Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

- Conducted detailed discussions with mentors and peers to identify main points in insurance operations.
- Collected requirements for managing Customers, Policies, Claims, and Mentors/Agents.
- Key requirements identified:
    - Efficient customer data management
    - Policy creation, renewal tracking, and coverage monitoring
    - Smooth claim submission and multi-level approval process
    - Automated notifications and reminders
    - Role-based access for Admin, Agents, and Manager

Stakeholder Analysis

- Identified primary stakeholders:
    - Customers: Need quick access to policy and claim status.
    - Agents/Mentors: Manage assigned customer portfolios efficiently.
    - Managers: Require dashboards and reports to monitor claims, policies, and approvals.
    - Admin: Manages overall system configuration, security, and approvals.
- Understanding stakeholder needs ensures the system addresses real-world challenges effectively.

Business Process Mapping

- Mapped existing insurance workflows:
    i. Customer purchases policy → Policy details recorded
    ii. Claims submitted → Reviewed by agent → Approved/rejected by manager
    iii. Manual notifications/reminders → Often delayed
- Identified bottlenecks and inefficiencies in manual processes.
- Proposed automated workflows and approval processes to streamline operations.

Industry-specific Use Case Analysis

- Analysed common insurance use cases relevant to the project:
    - Policy issuance and renewal tracking
    - Claim processing with multi-level approvals
    - Customer self-service for policy status and notifications
    - Compliance and reporting requirements
- Ensured Salesforce implementation aligns with insurance industry standards and best practices.

AppExchange Exploration

- Explored Salesforce AppExchange to check for existing solutions or templates.

- Evaluated pre-built apps for policy management, claim tracking, and dashboards.

- Decided on custom implementation to meet project requirements and provide flexibility.