# Data Analysis Project

## Data Analyst: (You)

## Client/Sponsor:

Investor, President, BoD, Executive Department, Operation Department of Medici Insurance

## Purpose:

*Write a brief description of why this project is happening below. Why is this project happening? What are the goals?*

The purpose of this project is to conduct a comprehensive study of the agency management process at Medici Insurance. The primary goals are to identify the top 10 "hotspot" processes within the agency resource attraction, onboarding, and hierarchy management. The aim is to update and optimize these processes, ultimately enhancing the efficiency of human resources within the Insurance Agency. This optimization is expected to contribute to the improvement and increase in revenue from insurance contract sales.

## Scope / Major Project Activities:

*What are the major parts of this project? List out the high-level steps, activities, or stages of the project, and give a brief description for each.*

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| --- | --- |
| Activity | Description |
| Data collection | * Agency data of InsurTech platform on AWS RDS * User actitivies on Google Firebase * Web, mobile Applications log on AWS CloudWatch * Agency recruitment Survey responses on Google Survey |
| Process Study | * Analyze the current agency management processes. * Identify key areas related to resource attraction, onboarding, and hierarchy management. |
| Hotspot identification | * Analyze the current agency management processes. * Identify key areas related to resource attraction, onboarding, and hierarchy management. |
| Agency Resource Attraction Analysis | * Conduct an in-depth analysis of current processes related to attracting new agency resources. * Identify bottlenecks and inefficiencies in the resource attraction phase. |
| Onboarding Process Evaluation | * Evaluate the current onboarding process for new agents. * Identify areas for improvement in onboarding to enhance the efficiency of bringing new agents into the system. |
| Hierarchy Management Assessment: | * Analyze the existing hierarchy management processes within the agency. * Identify any issues or gaps in the current hierarchy structure and propose optimizations. |
| Document & presentation | * Document findings, recommendations, and the updated processes. * Create a comprehensive report outlining the analysis and proposed improvements. * Present the findings and recommendations to key stakeholders. * Address any questions or concerns from the client. |

## This project does not include:

*Specify the things that this project isn’t responsible for doing (out of scope). For instance, “this project does not involve a summation of 2019 data analysis”*

* Summation of 2018, and 2019 data analysis (the period beginning of opening the insurance agency, the tech platform is in developing-phase)
* Implementation of software or tools without further analysis.

## Deliverables:

*A specific list of things that your project will deliver.*

|  |  |
| --- | --- |
| Deliverable | Description/ Details |
| Data collection | Using Apache Spark/AWS EMR to stream data from RDS  Export and summerize data on Firebase to expect format  Collect survey responses based-on 5 main information points related to Agency concerns  Query and export log to AWS S3 by some popular format that is easy to analyze |
| Process Study | Detailed analysis of current agency management processes.  Identification of key areas for improvement. |
| Hotspot Identification Report | List of the top 10 critical processes affecting agency performance.  Prioritization based on impact. |
| Resource Attraction Analysis Report | A detailed report outlining the analysis of the current agency resource attraction process.  Recommendations for optimizing the resource attraction phase. |
| Onboarding Process Improvement Plan | A plan detailing proposed improvements to the onboarding process.  Clear steps for implementing the suggested enhancements. |
| Hierarchy Management Optimization Proposal | A proposal outlining suggested optimizations for the agency's hierarchy management processes.  Recommendations for creating a more efficient hierarchy structure. |

## Schedule Overview / Major Milestones:

*The expected schedule for the project. This can be defined by milestones (e.g. “all data is cleaned and processed”), periods of time (“Week 1 / Week 2”), or other ways based on the needs of the project.*

|  |  |  |
| --- | --- | --- |
| Milestone | Expected Completion Date | Description/Details |
| *Data collection* | *2023-11-20* |  |
| *Process Study* | *2023-11-25* |  |
| *Hotspot Identification Report* | *2023-11-30* |  |
| *Resource Attraction Analysis Completion* | *2023-12-10* | Completion of the analysis phase for agency resource attraction. |
| *Onboarding Process Evaluation Completion* | *2023-12-25* | Completion of the evaluation phase for the onboarding process. |
| *Hierarchy Management Assessment Completion* | *2023-12-30* | Completion of the assessment phase for hierarchy management processes |

## \*Estimated date for completion:

*This is my “if all goes well and I have everything I need, this is when I’ll be done” date.*

2024-01-10: This is the estimated date for overall project completion, considering successful execution of all activities and milestones.