Functional Requirements of Customer Lead Generation And Review System In Insurance

Objective

The objective of this project is to develop a customer lead generation and review system that will help the insurance company to identify and qualify potential customers, as well as to track and manage the progress of leads through the sales process. This system will improve the efficiency and effectiveness of the sales process by automating tasks and providing sales team with the information they need to close more deals. The system will also help the insurance company to improve its customer acquisition process, increase its sales efficiency, reduce its sales costs, and increase its revenue.

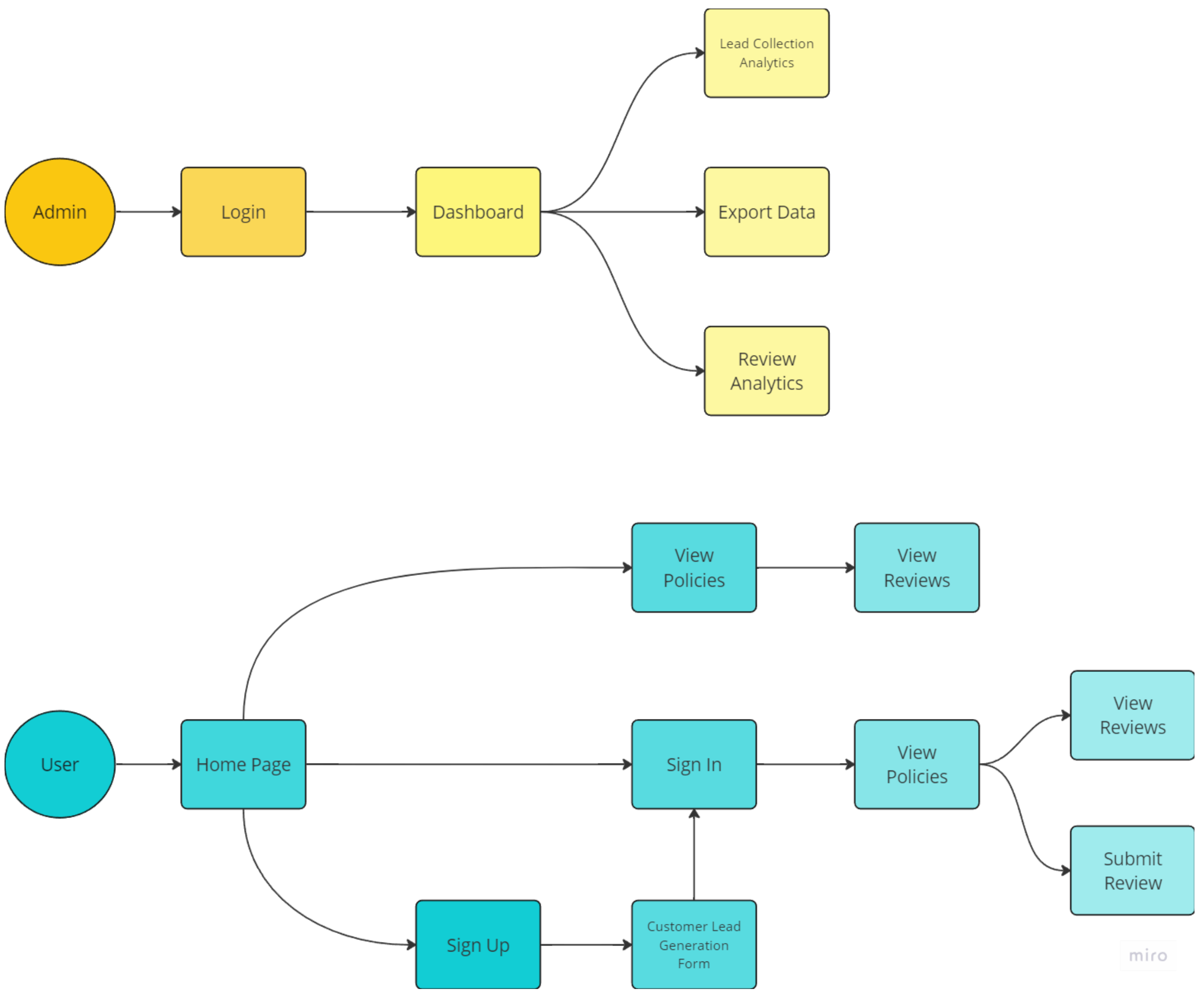
Features Supported in Application

Functions available for Admins are as follows:

1. Access to lead collection analytics
2. Export lead collection data into .csv file
3. Access to review analytics

Functions available for Users are as follows:

1. View policies
2. Submit review for a specific policy.
3. View others review
4. Access to customer lead generation form



Features for Admin:

Login > Dashboard > Views Lead Data Analytics

OR

Login > Dashboard > Views Lead Data Analytics >Export Data

OR

Login > Dashboard > Views Review Analytics

On the dashboard page provided for the admins to view a dashboard that provides information about the system, such as the number of users, the number of reviews, and the category chart with the number of leads.

Field Name	Description
Export Data	Allows the admins to export data into .csv file
Lead Data Analytics	Allow the admin to view analytics related to lead data collected
Review Analytics	Allow the admin to views analytics related to reviews collected

Admin Interactions:

1. To **Export Data**, select the **Leads** option in the dashboard.
   All the related fields will appear on the screen as a table which can be downloaded by clicking on **Export data** button.

2. To **View Lead Data Analytics**, select the **Leads** option in the dashboard.
   All the details will appear on the screen and at the top of the table Number of Leads is Shown.

3. To **View Review Analytics**, select the **Reviews** option in the dashboard.
   All the details will appear on the screen and at the top of the table Number of Reviews is Shown.

Click **Back to Dashboard** to navigate back to the dashboard

Features for Users:

Home Page >View Policies

OR

Home Page >View Policies > View Reviews

OR

Home Page > Sign In > View Policies > View Reviews >Submit Review

OR

Home Page > Sign Up > Customer Lead Generation form >Sign In > View Policies > View Reviews >Submit Review

When the opens the application, user will be displayed with the home page. From here user can find different policies available and can views details of a specific policy by navigating to it or also can view reviews if available.
From the home page user can sign in to submit reviews
From the home page if the user is new, he/she can sign up and fill the questionnaire so get personalized recommendation from the sales team.

Field Name	Description
View Policies	Display a list of available policies.
View Reviews	Displays all available reviews.
Policy Specific Page.	Display all the information about the policy.
Submit Review	Allows user to submit his/her reviews.
Customer Lead Generation Form	Allow user to file questionnaire using which user can get personalized recommendations.

User's Interactions:

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1. To **View Policies,** Open the application. This will take the user to dashboard, where list of policies available are shown.
2. To **View Reviews,** user can navigate to selected policy and can get a list of reviews.

3. To **View Policy Details**, Click the specific policy to View Detailed information about the policy.
4. To **Submit Review,** User my be signed in and can navigate to selected policy and can submit a review.
5. To **Submit Customer Lead Generation Form**, A new user must sign up and will be navigated to a questionnaire which the user must answer.

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Click **Back to Home** to navigate back to the Home.

Click **Logout** to logout.