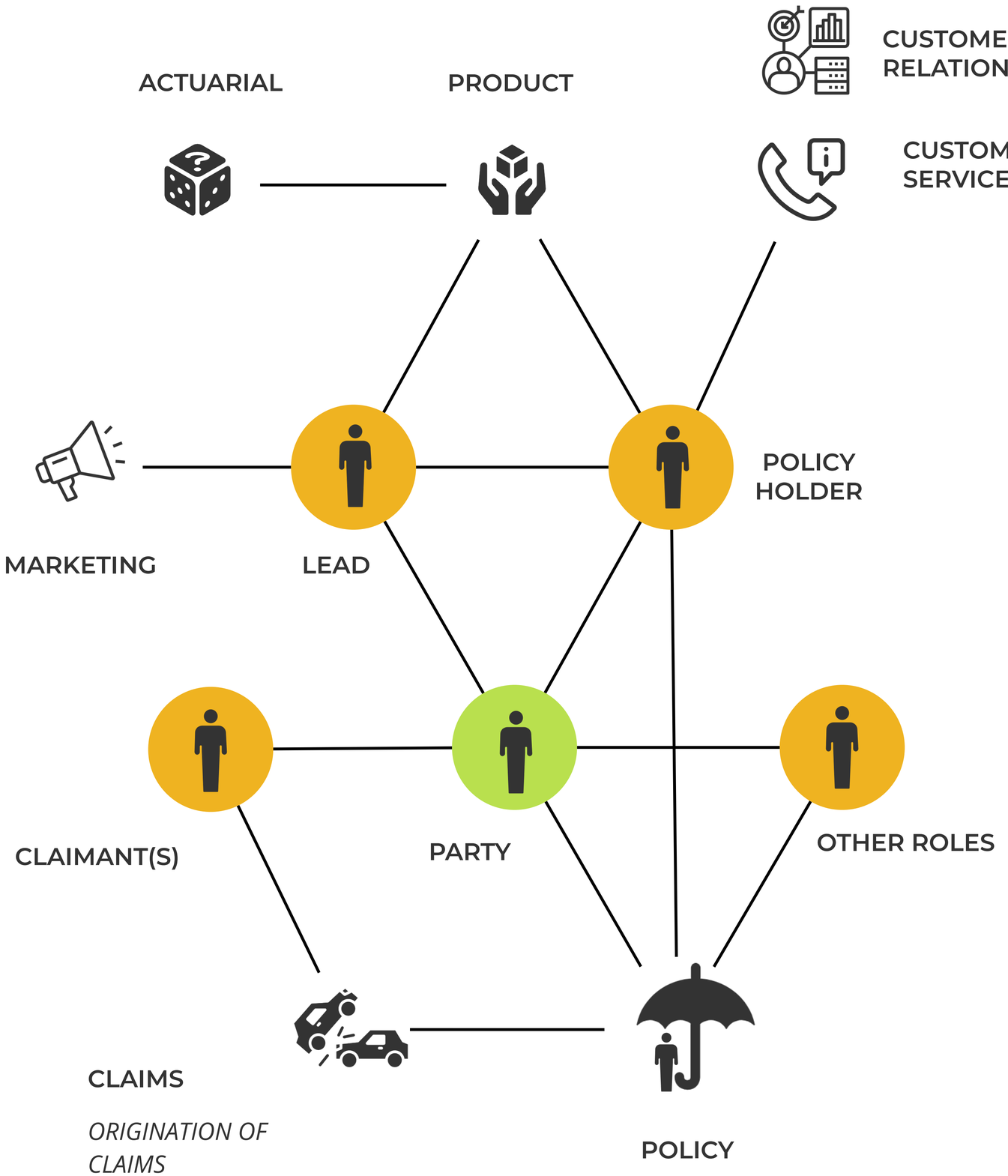
SAMPLE 1

data		A customer **billing statement**
information		A dashboard of **billing history & payments trends** of the customer. Overall revenue on a CL account / pool performance.
insight (usually I address this layer as knowledge)		Is she/he **likely to miss payments** again based on current schedule & trends? Is the CL account profitable? Is this pool profitable?
wisdom/experience		Should we, as a company, **write off this account**? Is it worth going after this? *Does get influence from branding drivers. Gets into soft side of data.*



ORIGINATION OF CLAIMS

SUBJECT AREA MODEL : BUSINESS FUNCTIONS / PARTY / ROLE

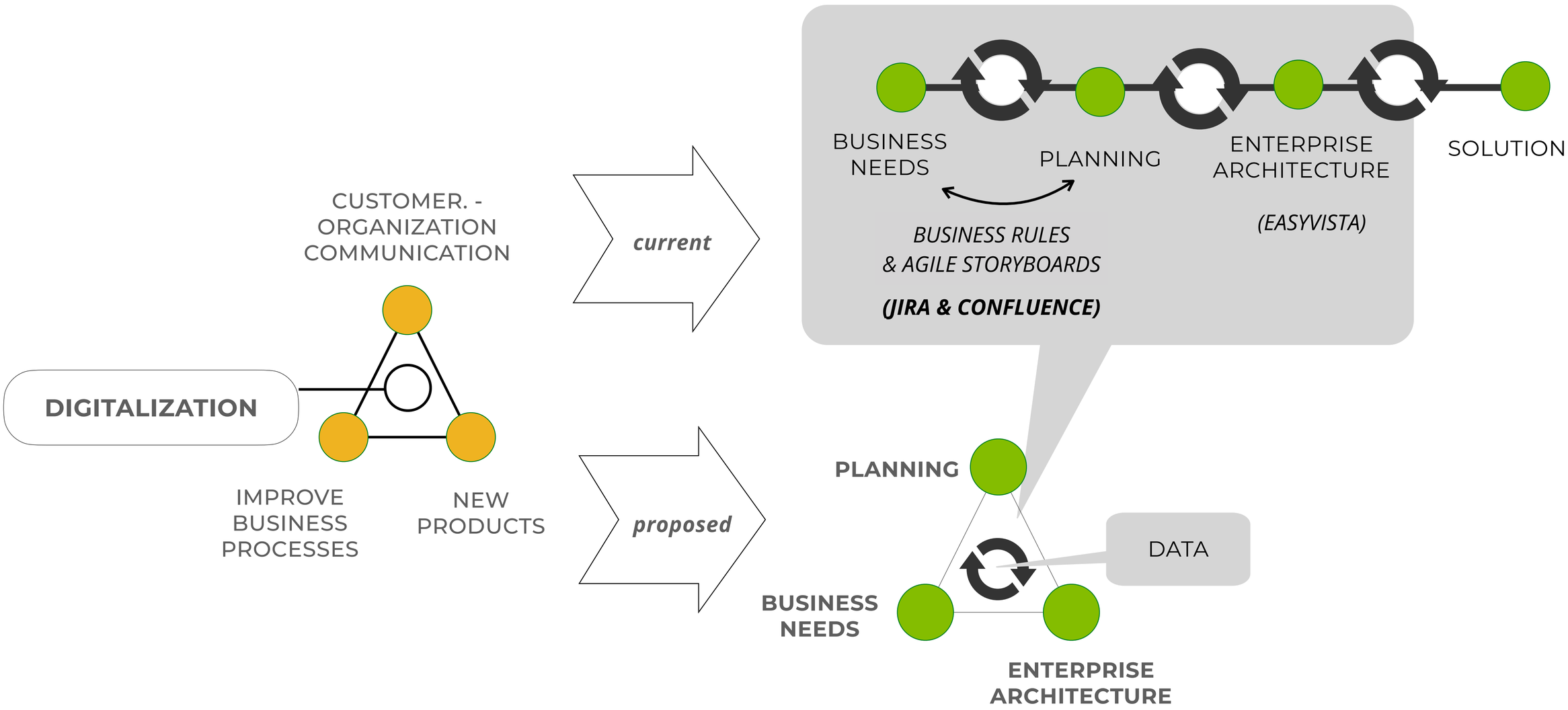
SUBJECT AREAS / CONCEPTUAL MODEL WIP - SDAS

LEGEND

ROLES

BUSINESS FUNCTIONS

SUBJECT AREAS / CONCEPTUAL MODEL WIP
*CRITICAL **PARTY** ELEMENTS*
BUSINESS RULES ...


CUSTOMER. -
ORGANIZATION
COMMUNICATION
DIGITALIZATION
IMPROVE
BUSINESS
PROCESSES
NEW
PRODUCTS
current
proposed
BUSINESS
NEEDS
PLANNING
ENTERPRISE
ARCHITECTURE
SOLUTION
BUSINESS RULES
& AGILE STORYBOARDS
(JIRA & CONFLUENCE)
(EASYVISTA)
PLANNING
DATA
BUSINESS
NEEDS
ENTERPRISE
ARCHITECTURE

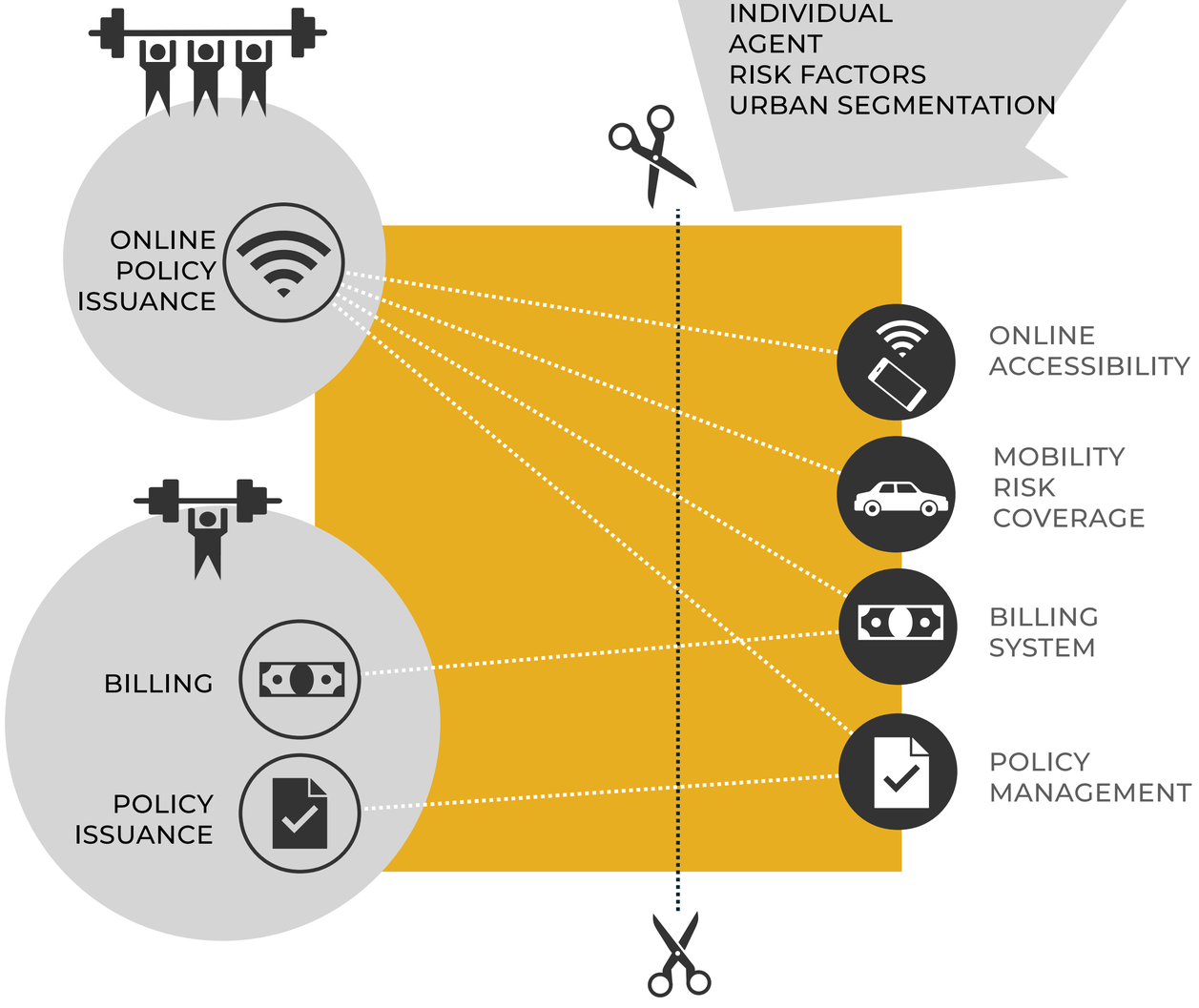
EXAMPLE

AN EXAMPLE TO HIGHLIGHT LINEAGE OF CAPABILITIES TO APPLICATION. IMPACT OF BUSINESS ENTITIES TO OPENING UP PLANNING, ARCHITECTURE & SOLUTIONS LINEAGE.

Establish Common Denominator Between Application Assets & Enterprise Capabilities
*-**Business Entities***

BUSINESS ENTITIES

LEGAL ENTITY
INDIVIDUAL
AGENT
RISK FACTORS
URBAN SEGMENTATION



APPLICATIONS

DEPARTMENTAL CAPABILITIES

CROSS FUNCTIONAL CAPABILITIES

BUSINESS ENTITIES

THINGS THAT A BUSINESS INTERACTS WITH TO MEET ITS OBJECTIVES

DATA

BUSINESS ENTITIES ARE REPRESENTED BY DATA.

CUSTOMER, POLICY CONTRACT, BILL ARE EXAMPLES OF BUSINESS ENTITIES.

OPERATIONAL HIERARCHY

- Translation ID
- Translation Parent ID
- Translation Child ID
- Version ID

ORGANIZATIONAL OWNERSHIP

- ORGANIZATION ID
- CERTIFICATION ID
- VERSION ID

IDENTIFICATION MASTER

SCHEMA OWNER

IDENTIFICATION SCHEMA

IDENTIFICATION

FUNCTIONAL OWNERSHIP

- Function ID
- Function Descriptor
- Version
- State
- Application ID
- Translation ID
- Version ID

NAME

NAME ROLES

ADDRESS ROLES

ADDRESS

GEOPOLITICAL LOCATION

VIRTUAL LOCATION

ADDRESS TYPE

HOUSEHOLD

ENTITY

BUSINESS ENTITY

INDIVIDUAL

PRIORITIZATION

- ✓ Claims
- ✓ Billing
- ✓ Policy Center
- ✓ CSR
- ✓ GainWeb 2.0

- ELECTRONIC MEDIA
- TELEPHONIC MEDIA
- SOCIAL MEDIA
- PHYSICAL MEDIA

PRODUCT

MARKETING DEFINE MARKET & CAPITALIZE MARKET FORCES

CUSTOMER SERVE **CUSTOMER** NEEDS & ATTEND TO THE RELATIONSHIPS AT LARGE

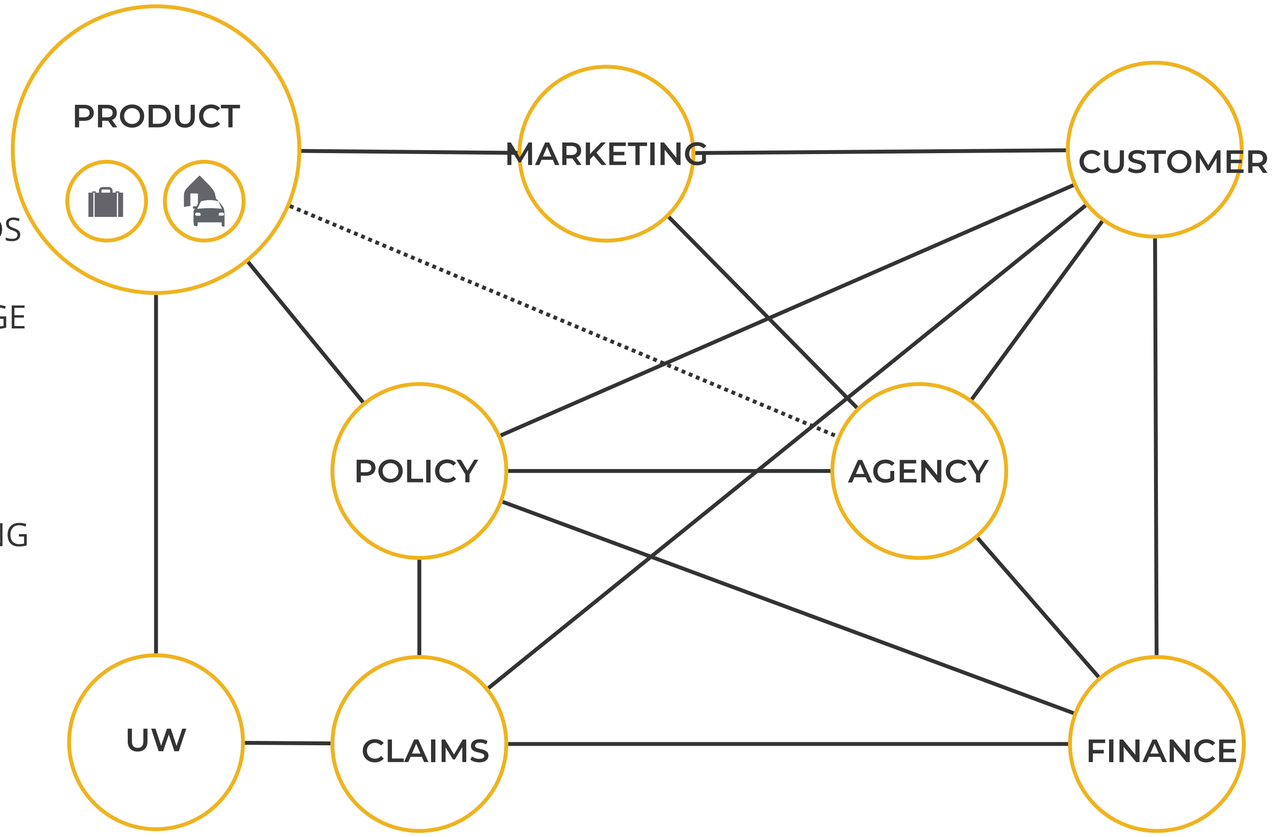
FINANCE MANAGE BILLING AMONG *OTHER* FUNCTIONS

AGENCY

POLICY MANAGE POLICY LIFE CYCLE

UW MANAGE PRODUCT & CLAIMS UNDERWRITING

CLAIMS MANAGE LOSS COVERAGE SLA



MORE TO CONVERSE ▶ LEGAL

CORE SUBJECT AREAS SUBJECT AREA VIEW WITHOUT OVERLAY OF CUSTOMER FOCUS.

LEGEND

THIS ARTIFACT IS AN AID FOR DISCUSSIONS ALONG THE LINES OF SUBJECT AREAS.

A CURRENT STATE IS START OF DISCUSSION. AS WE ALL REFLECT ON THIS MAP, WE CAN MOVE TOWARDS A TARGET STATE

OPEN QUESTIONS: MARKETING I AGENCY INTERCONNECTION. NOT IN CONTEXT OF CURRENT CIF PROJECT. WORTH EXPLORING FOR LARGER CONTEXT.

LEGAL SUBJECT AREA TO BE CONSIDERED.

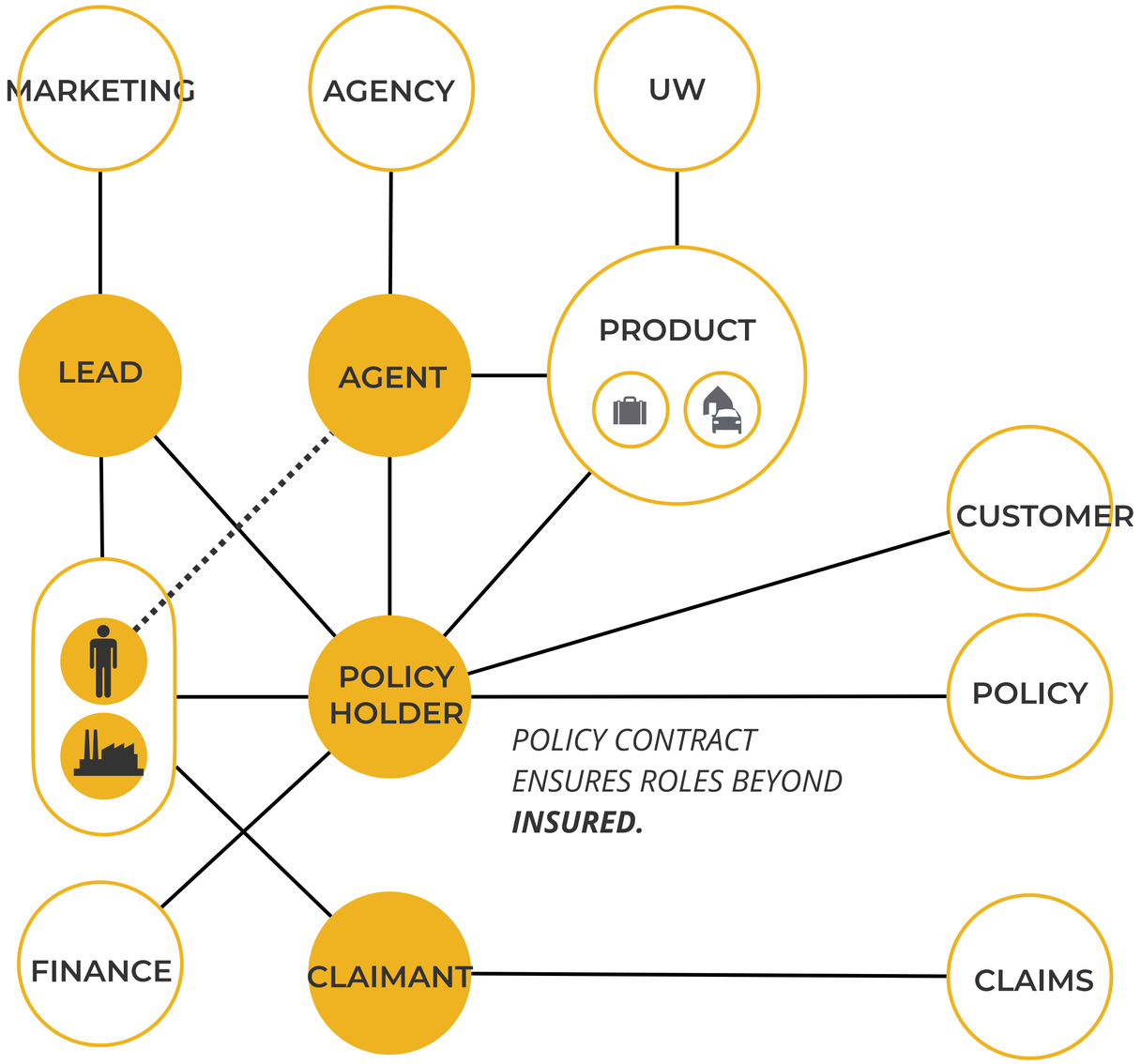
SUBJECT AREA — HIGHEST LEVEL SEGMENTATION - INCLUDES INFORMATION, OWNERSHIP, POLICIES, ACTIVITIES.

..... OPEN TO DISCUSSION

SUBJECT AREAS / CONCEPTUAL MODEL
WIP
CURRENT STATE *VERSION 0.8 SDAS 12/08*

THIS ARTIFACT IS AN AID FOR DISCUSSIONS ALONG THE LINES OF SUBJECT AREAS, BUSINESS TOUCH POINTS, AND DATA WITH A SINGULAR OBJECTIVE OF CUSTOMER. ANOTHER INITIATIVE OR FOCUS, WOULD PERHAPS INCLUDE MORE SUBJECTS TO THIS ARTIFACT.

A **CURRENT STATE** IS START OF DISCUSSION. AS WE ALL REFLECT ON THIS MAP, WE CAN MOVE TOWARDS A TARGET STATE.



*POLICY CONTRACT ENSURES ROLES BEYOND **INSURED.***

MORE TO CONVERSE

ACTUARY | REGULATOR | CLAIMS REP | ADJUSTER | CUSTOMER SERVICE REP | UNDERWRITER | LEGAL

CURRENT STATE SUBJECT AREA INTERACTIONS WITH PEOPLE & ORGANIZATION SPECIFIC TO CUSTOMER FOCUS

LEGEND

INDIVIDUAL

ORGANIZATION

WHO CAN INTERACT - AS A POLICY HOLDER, OR A CLAIMANT OR OTHERS RELATED TO PL/CL PRODUCT LINES.

AN **AGENT** IS LIKELY TO BE AN **INDIVIDUAL,** AS SHOWN BY THE RELATIONSHIP

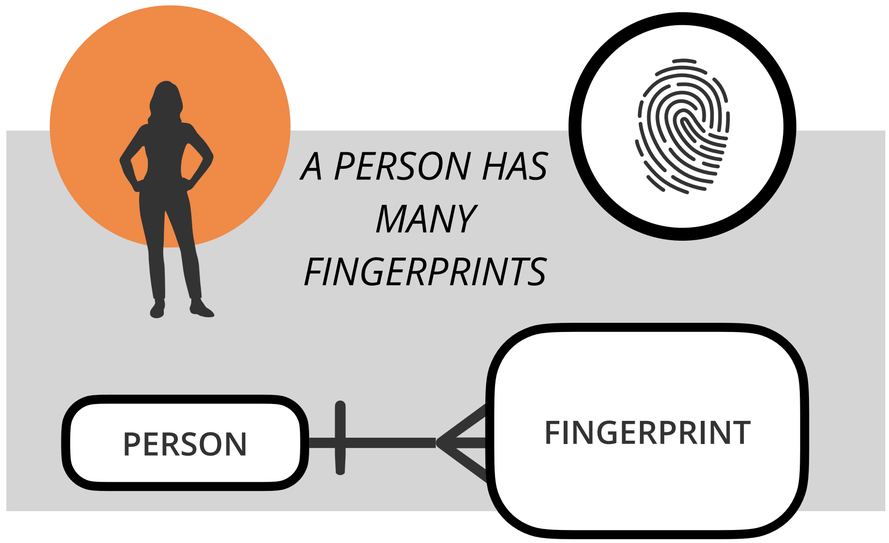
ROLES THE INDIVIDUAL OR ORGANIZATIO N PLAYS WITHIN THE BUSINESS MODEL.

SUBJECT AREA

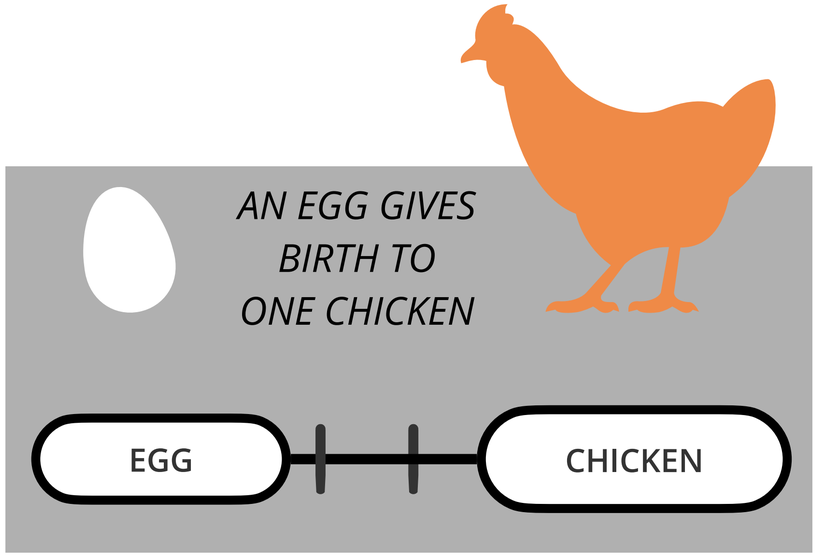
BUSINESS FUNCTIONS

OPEN TO DISCUSSION

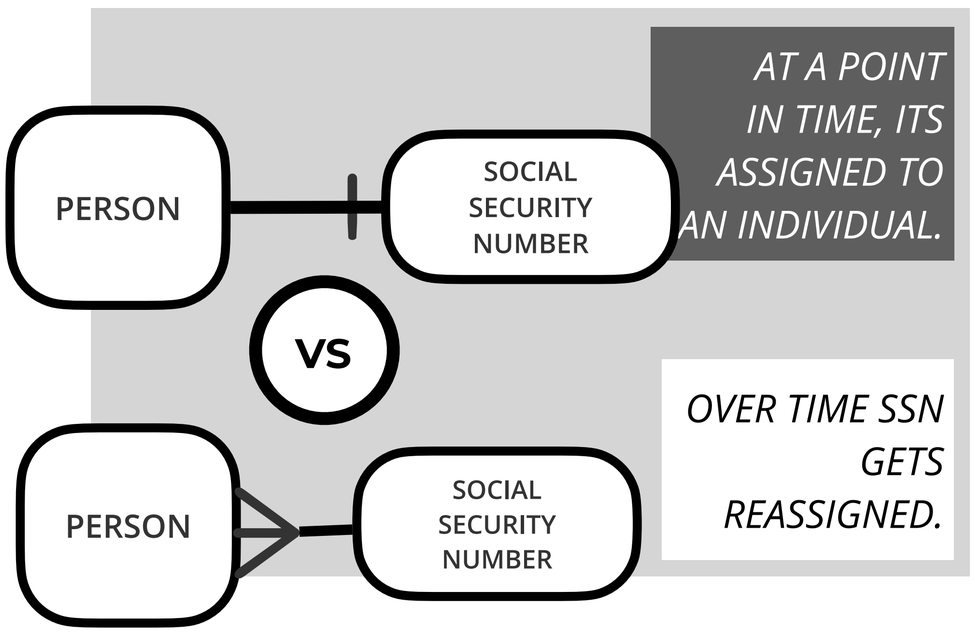
SUBJECT AREAS / CONCEPTUAL MODEL
WIP
***CURRENT STATE** VERSION 0.8 SDAS 12/08*



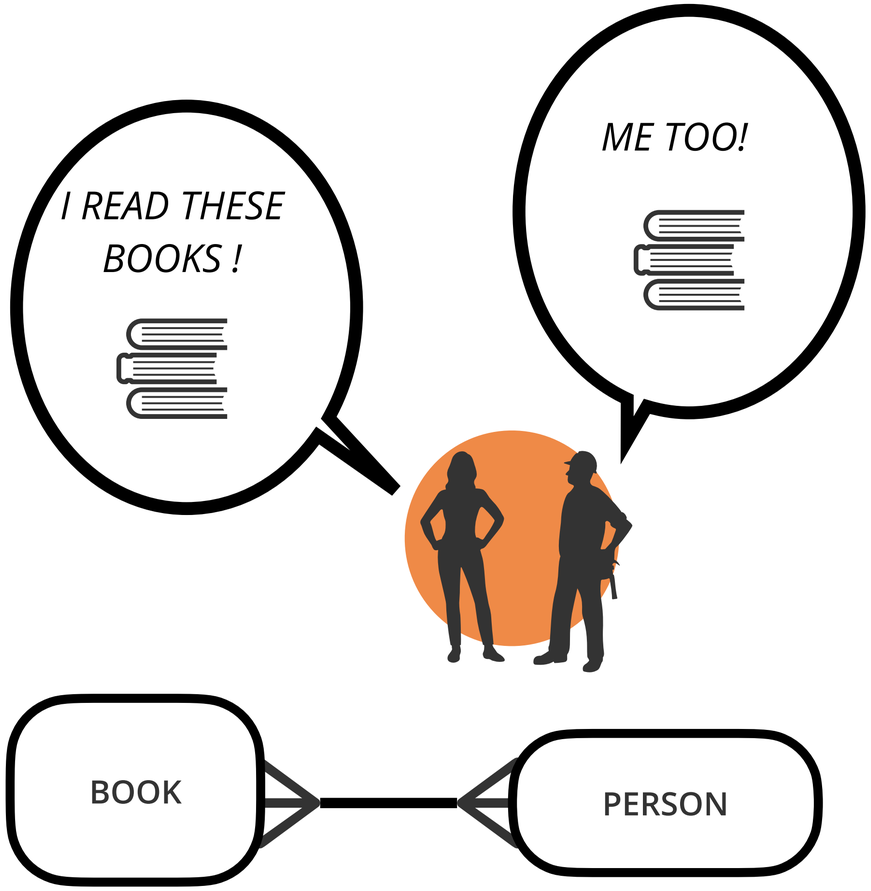
Street name "One to Many"



Street name "One to One"



Time sensitivity of information depiction



Street name "MANY to Many"

IDENTIFICATION

FIRST NAME

LAST NAME

MIDDLE INITIAL

SUFFIX

SALUTATIONS

GEO-POLITICAL LOCATION

ADDRESS 1

CITY

STATE

COUNTRY

GEOPOLITICAL CATEGORIES

VIRTUAL LOCATION

PHONE

EMAIL

HOMEPAGE

SOCIAL MEDIA

FACEBOOK

TWITTER

OTHER

PRIORITY

FUNCTIONAL CONSTRAINT

LOB

PRODUCT

REGULATORY IMPACTS

AGENCY

- AGENCY NAME

AGENT

HIERARCHY

CONTRACTS

MKT & SALES

CAMPAIGNS

SALES FUNNEL

BEHAVIOR DATA

URBAN SEGMENTATION

FUNCTIONAL ALERTS

SYSTEMIC ALERTS

FUNCTIONAL STATUS

- BILLING
- CLAIMS
- POLICY

FUNCTIONAL EVENTS

SALES

POLICY

CLAIM

FINANCE

LEGAL ENTITY ROLES

LEAD

PROSPECT

INSURED

CO-INSURED

PAYOR

BENEFICIARY

CLAIMANT

3RD PARTY CLAIMANT

DRIVER

PASSENGER

PREFERENCES

CONTRACT

PAPERLESS

RENEWAL DATE

COMMUNICATION

CHANNEL ENGAGEMENT

BILLING PREFERENCE

- EFT
- ALERTS

IDENTIFICATION

LOCATION

- DATE OF BIRTH
- GENDER

IDENTIFICATION SCHEMAS

DRIVING LICENSE
SOCIAL SECURITY #

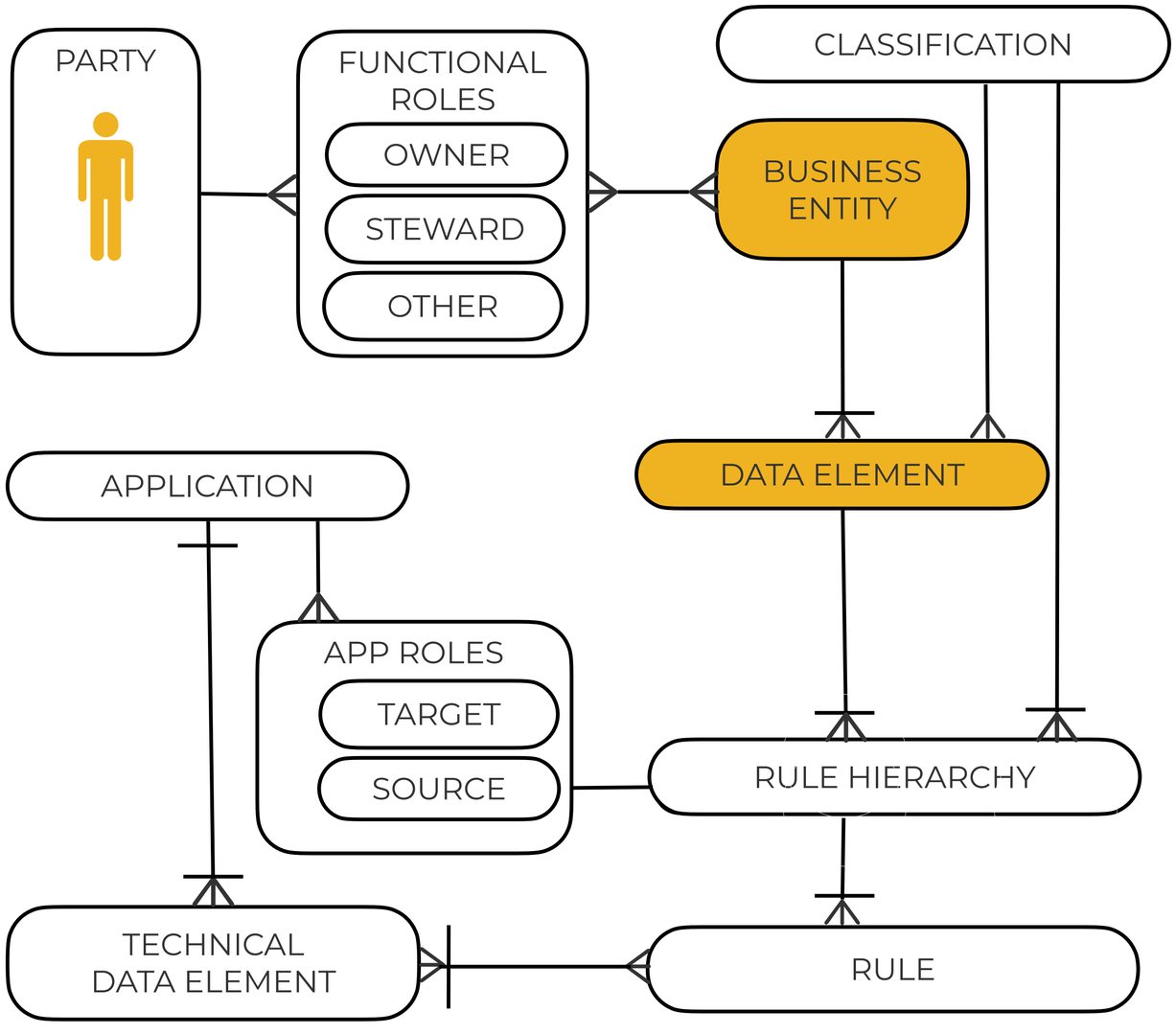
IDENTIFICATION ROLES

- POLICY IDENTIFIER
- CLAIMS IDENTIFIER
- BILLING IDENTIFIER

GEO LOCATION ROLES

- BILLING ADDRESS
- PRIMARY PHONE
- PRIMARY EMAIL
- SEASONALITY PARMS
- CLAIMS OVERRIDES

A SUGGESTED CONCEPTUAL VIEW OF THE CUSTOMER



Primary

Digital-Green
#2E7D32

Dark-Green
#005005

Light-Green
#84BD00

Gold
#F0B323

CONCEPTUAL RULES & RELATIONSHIPS V0.5 SDAS 1/6/21

MDM WORKFLOWS ARE MEANT TO SCAN THE REGISTERED SOURCES TO SEE IF THE ATTRIBUTES ARE COMPLIANT TO DATA RULES.

IF THIS IS CUSTOM OR MDM SUPPLIED, THOSE RULES WILL BE IMPLEMENTED.

IN THIS CASE, AN OPT-OUT FLAG WOULD PROMPT DELETION OF THE CUSTOMER BASED ON THE CHOICE OF THE CUSTOMER.

DATA STEWARD

OR AN UPDATE FROM CUSTOMER SERVICE REP OR CRM UPDATES THE FLAG

“OPT ME OUT” FLAG

THIS STATES IF CUSTOMER OPTED FOR “OPT OUT”?

MASTER DATA SYSTEM

CRM

GUIDEWIRE

BILLING

DOESN’T EXIST

Primary

Digital-Green #2E7D32

Dark-Green #005005

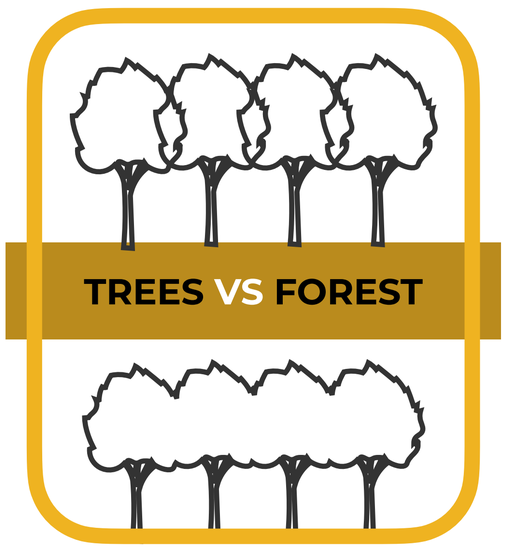
Light-Green #84BD00

Gold #F0B323

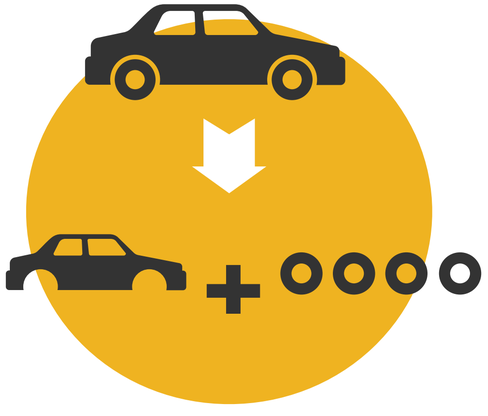
SKILLSET OVERVIEWS

TRANSLATION

ANALYTICAL



ABSTRACTION



DECOMPOSITION

ENGINEERING
HEAVY LIFTING

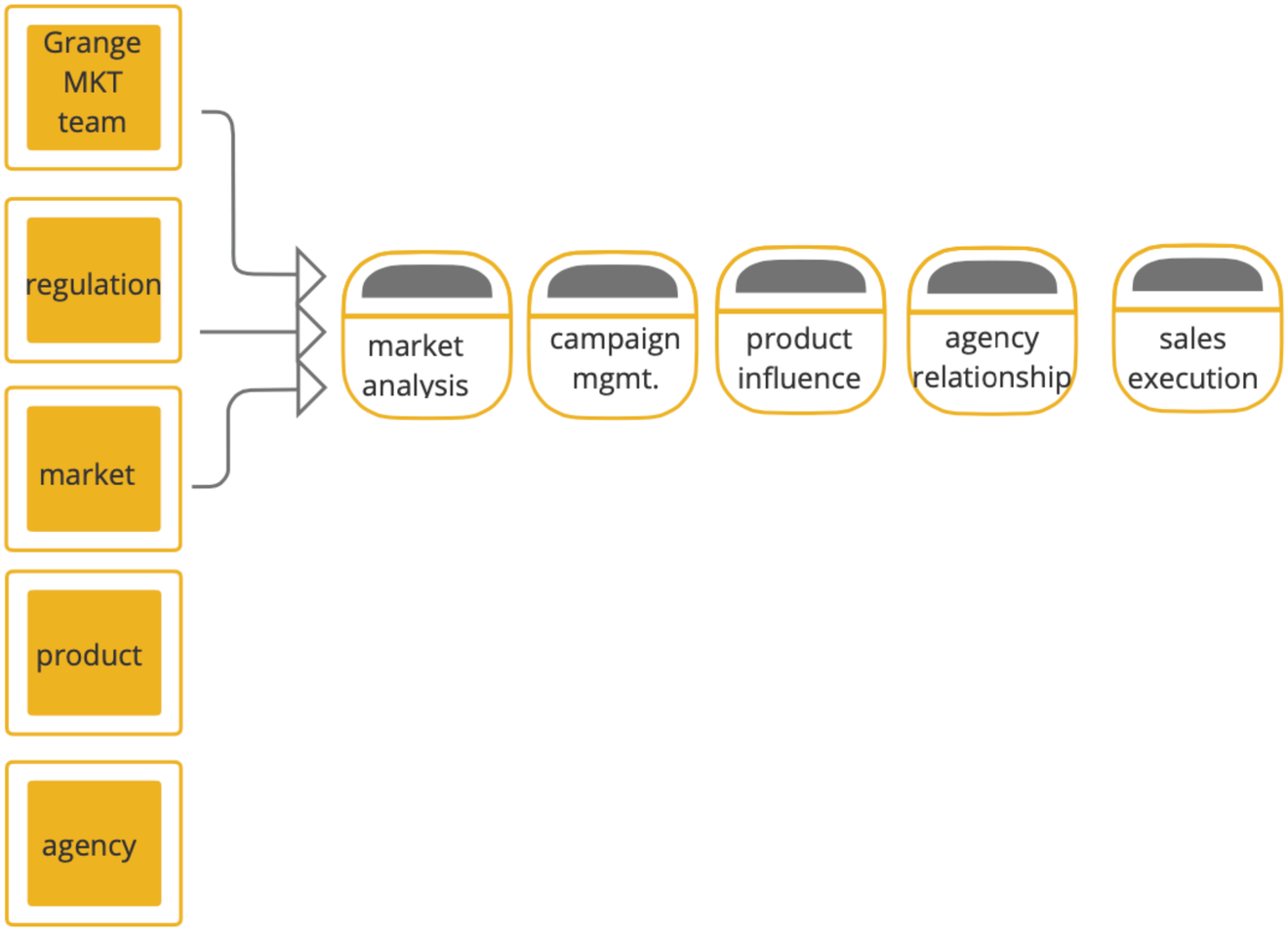
SALES & MARKETING

Policy

Marketing

Customer

EXAMPLE
AN EXAMPLE TO HIGHLIGHT CAPABILITIES TIED TO EXTERNAL ENTITIES.



Departmental or Complex Capabilities

Whats happening?

entities the process interacts with.

what do we keep so that we may use again.

what information is flowing?

- Cross functional Capabilities
- Departmental Capabilities
- Departmental Functions
- Processes. #**Nomenclature**

This set of decks are to showcase relationship of Subject Areas - thru journey of Capabilities & Processes to data assets.

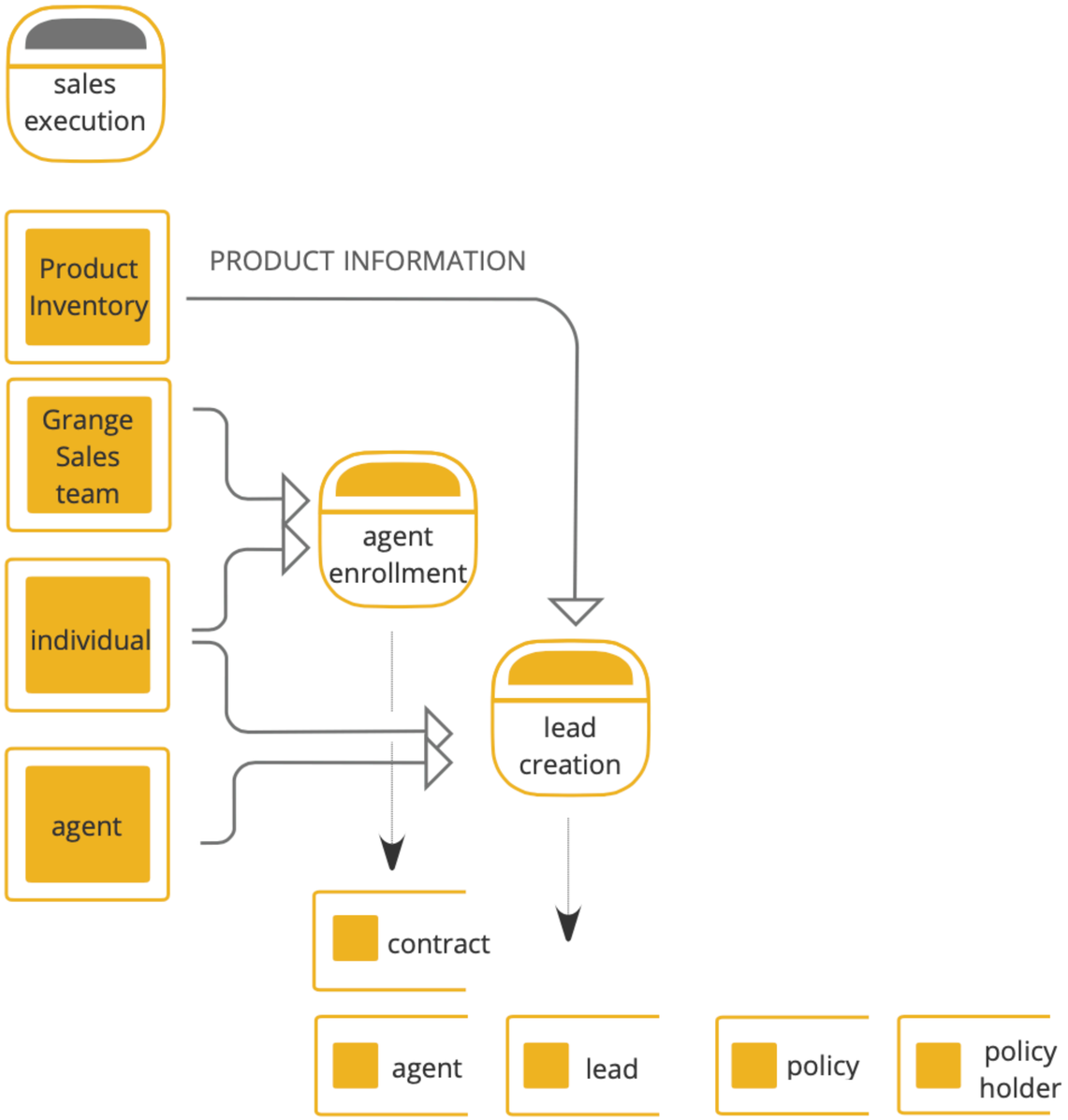
SALES & MARKETING

Policy

Marketing

Customer

EXAMPLE
AN EXAMPLE TO HIGHLIGHT CAPABILITIES TIED TO EXTERNAL ENTITIES.



- Cross functional Capabilities
- Departmental Capabilities
- Departmental Functions
- Processes. #**Nomenclature**

This set of decks are to showcase relationship of Subject Areas - thru journey of Capabilities & Processes to data assets.

Current State Subject Area Interactions with Process specific to Customer Focus

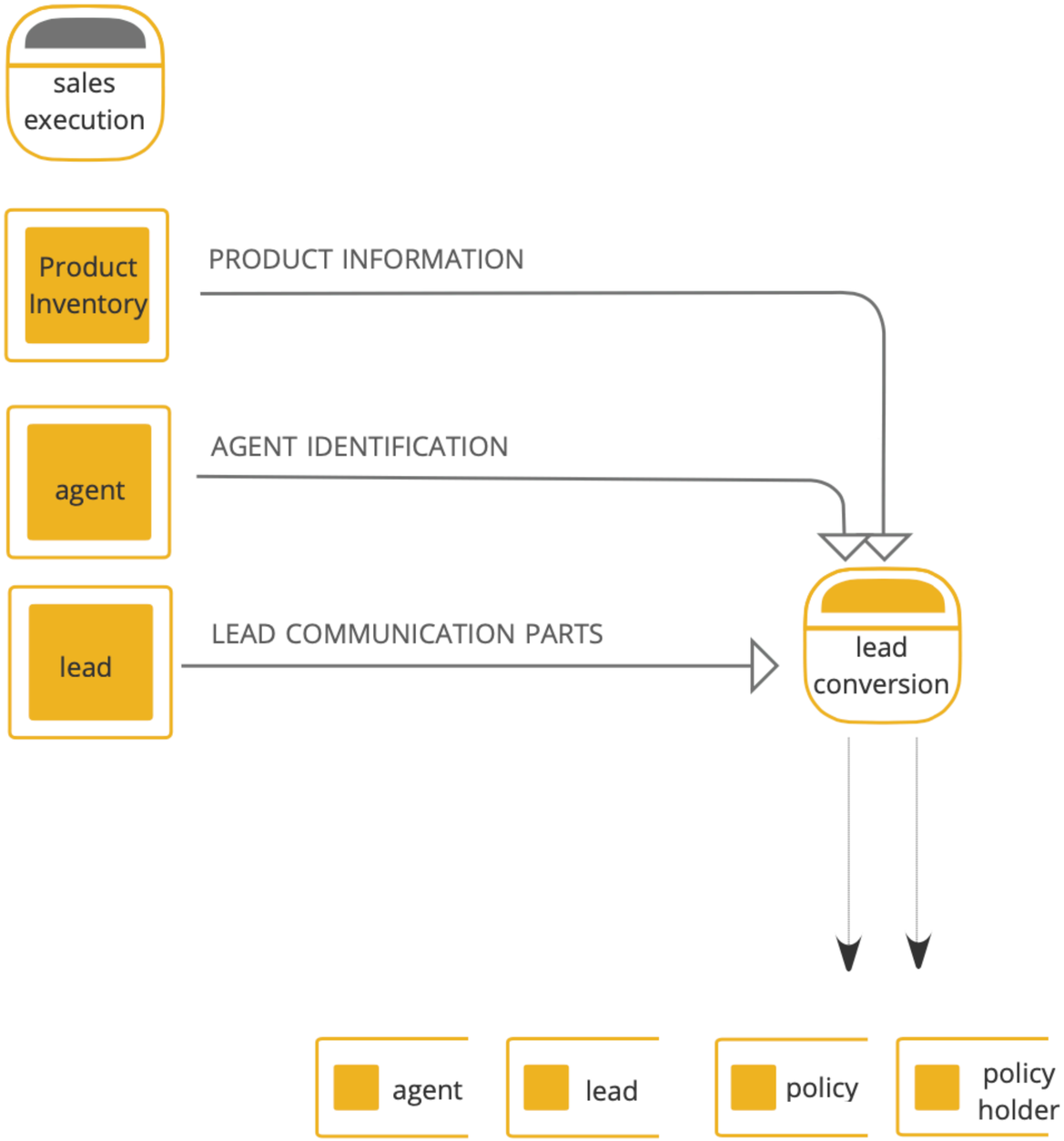
SALES & MARKETING

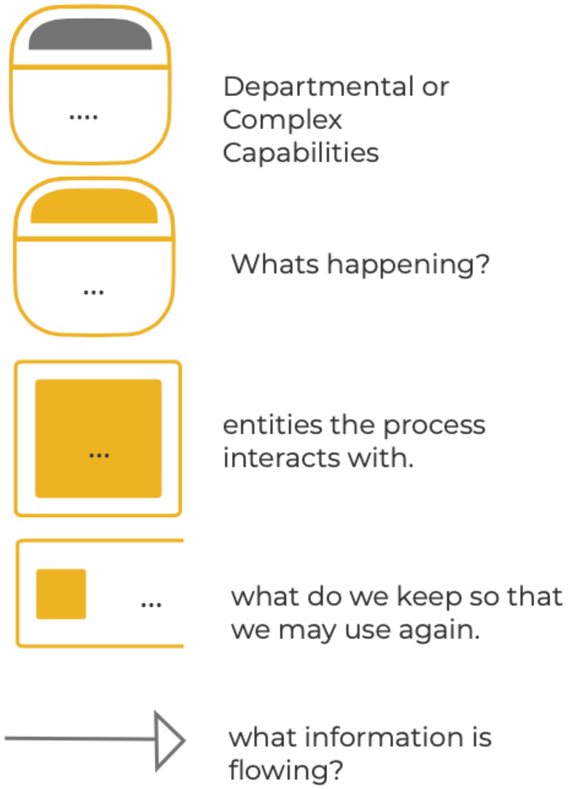
Policy

Marketing

Customer

EXAMPLE
AN EXAMPLE TO HIGHLIGHT CAPABILITIES TIED TO EXTERNAL ENTITIES.





Current State Subject Area Interactions with Process specific to Customer Focus

Subject Areas decomposition 0.5 SDAS 12/17