Design Review

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Problem Statement

- Our client operates in the realm of insurance
  - World wide insurance industry is multi trillion dollar market
  - Almost anything you can imagine can be covered by insurance
  - US laws impose that some forms of insurance coverage are mandatory, i.e Auto

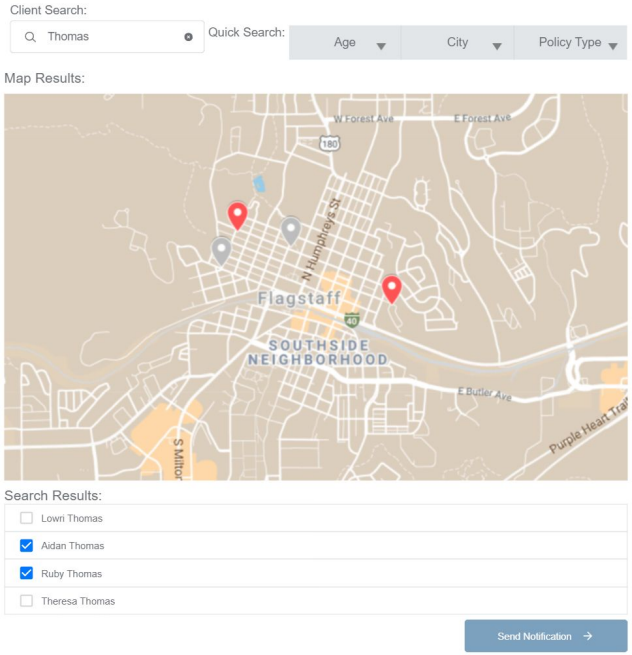
- State Farm is one of the largest insurance providers in the United States
  - Millions of clients across the nation with varying policies and needs
  - Tens of thousands of employees (Agents)
  - State Farm strives help more people, in more ways
  - Communicating with clients needs to be efficient and effective

Problem Statement

- Why were we hired?
  - Communication methods can be improved
  - Local agents have detailed knowledge of their respective regions
    - Local events, zoning or code changes, evolving weather conditions, and other events
  - Give agents an exceptionally flexible tool to manage and individually customize their client interactions
  - Enable Agents to be able to better serve their local communities

Solution Overview

- Alert system for communication between agents and customers
  - Uses text notifications and email
- Primary use case is for emergency communication
  - Can be used for more intuitive general communication via notification
- Emphasis on a location-based customer search
  - Map area outlining feature to select a region of customers
  - Quicker and more visual than current systems
- Searches can be done using other attributes
  - Insurance policy
  - Age



Key Requirements

- Requirements Acquisition
  - Meetings with clients

Domain Level Requirements

- Easy to use: Learn to use software in under 20 minutes
- Ability to perform most tasks in under 5 minutes
- Can handle a large agent user base of up to 20,000 agents
- Each agent should have their own user account

Functional Requirements

1. Dashboard view with access to all features
2. Ability to search and select clients based on location
3. Ability to re-execute and save previous searches
4. Ability to create subsets of clients
5. Ability to apply actions to client subsets
6. Notifications should have a priority level.
7. Ability for customer to choose notification types all/none/emergency
8. Ability to create “automations” for notifications
9. Integration with existing State Farm databases

Performance Requirements

- Page load times of less than 5 seconds
- Less than 10 second load times when using GIS and search interface

Environmental Requirements Brief

- Application uses a MongoDB database

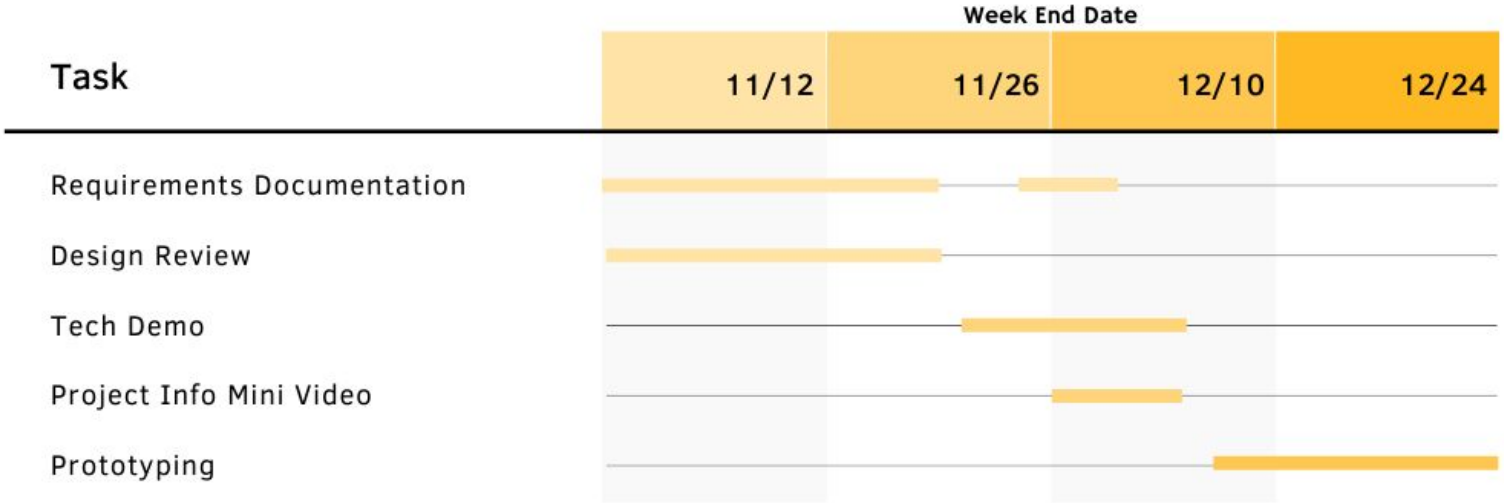
Key Requirement - Searching Ability

- System will allow the ability to search by:
  - Location
    - Uses an embedded GIS system that allows user to specify on map what area of customers to select
    - Can also search manually by county, city, state, etc
  - Attribute
    - Uses a simple interface for agents to specify fields as needed
    - Can search by any number or combination of attributes
      - Name
      - Insurance Policy
      - Phone Number

Risks and Feasibility

- Potential Risk and Feasibility
  - Customers not receiving notifications.
    - Required to OPT-IN, and allow OPT-OUT
  - Sensitive information goes to the wrong person.
    - Automated Notifications must be informative, however generic.
  - False alarm notifications/incorrect notifications.
    - Categorized by Geographical location, and can be modified.
  - Data Leaks.
    - Modern Internet Practices
    - Security Testing

Schedule


Week End Date
Task
11/12
11/26
12/10
12/24
Requirements Documentation
Design Review
Tech Demo
Project Info Mini Video
Prototyping

Conclusion

- Overall Situation
- Problem Statement
- Solution (Red Alert)
  - GIS mapping
  - Utilizing Features to send Notifications and messages to clients

- Like a Good Neighbor, Red Alert is there.

Red Alert

State Farm®