Team Red Alert

Team Members: Sal Galan (lead), Calvin Harper, Myles Dailey, Nick Nannen

Mentor: Han Peng

The Big Picture

Connectivity between businesses and clients has always been a focus of most companies

- Customer service based companies especially

Customer service representatives are responsible for a subset of customers

- Need reliable, quick, and easy to use methods of contact to reach them

Software that allows agents to do this are viable, but could use some improvement

Our Client

State Farm Insurance

- Glenn Austin : Technology Analyst - IT Operations
- Hans Yeazel : Technology Manager - Infrastructure & Technical engineering

Providing a variety of insurance services to a vast number of clients

- Need to reach out and connect quickly with clients in cases of house fires, car accidents, etc.

The Problem

State Farm agents have to manually look through a list of their clients and their characteristics to identify clients they need to communicate with.

Why is it difficult for agents to send notifications to groups?

- Agents can't filter clients based on characteristics such as age, location, or policy type.
- Messaging a group of clients must be done manually. Messaging more than 20 clients with the same message is not trivial when the agent has to input client emails by hand.

Step 1

Locate a client with a specific policy type.

Step 2

Manually enter the clients email address into the email to be sent

Step 3

Repeat steps 1-2 until all clients have been accounted for.

Step 4

Type in a message and send the email.

Current Problematic Workflow

Our Solution

Create a web app that will allow State Farm agents to easily send notifications to groups

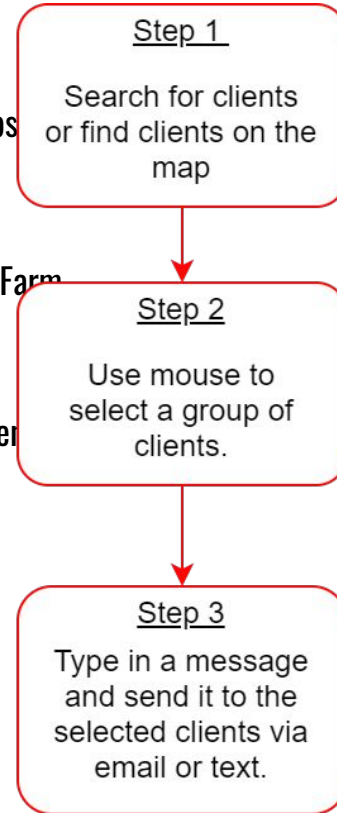Searching For Clients With Specific Traits

- Age, address, policy type and any other type of client trait available from State Farm

Selecting Clients Based on Location

- Use an existing digital mapping system such as google maps to display each clien

Send Notifications to Clients

- Based on search results, create groups of clients to send a notification to.
- Create recurring notifications to send to clients.

Step 1

Search for clients or find clients on the map

Step 2

Use mouse to select a group of clients.

Step 3

Type in a message and send it to the selected clients via email or text.

Proposed Workflow for Our Solution

Development Plan

- Requirements Acquisition/Refinement
  a. Team Meetings
  b. Meeting Structure (Standards Document)
- Technical Investigation
  a. GIS Mapping
  b. Framework for creating User Friendly UI
  c. Integration and quick on boarding
- Issues
  a. Simple and quick for agents to learn
  b. Security issues with State Farm data