

Otso Case Code Camp 2015 Fixurance Project Report

Group 2

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1 Introduction

Overall this document presents a project of Insurance Sales Tool that we called as Fixurance service in order to solve a business case with LTC-Otso in paving the future of customer management in paperless environment [1]. With the main objective of “Grow your money and gain knowledge” concept, this application is an attractive tool to estimate the insurance prices with minimum information for marketing purposes. It is specially designed for the mobile devices or tablet to support the mobility of sales representative in promoting insurance plans or as a stand-alone application to the prospect customers. This application is designed to improve the usability and user-friendly.

1.1 Idea and Motivations

The main idea of this tool is to: attract the customers as an attractive tool, estimate the insurance prices with minimum information for marketing purposes, support the mobility of Sales Representatives in promoting Insurance plans; and support the prospect Customers to explore the tool as a standalone application. However, there are several challenges to achieve the main goal. The challenges are: the difficulty to implement mobility in sales process, to support Partner Network Sales in any events and shopping malls and to create the more user-friendly and brief interactions with the prospect customers. In brief, the business case is in needed to fulfil all of these needs and usability as the main target.

In the following chapters first the technical implementation details are explained, after which there is a short chapter on possible use cases of the program and a short chapter on the development tools used. The technical implementation explains the details of GUI implementation, data structures and some finer details where necessary.

2 Service Description

Figure 1 describes how two forms of clients connect to an application service. All information (Collecting Customer Information, Retrieving Pricing estimation and Lead customers) are passed through the service from the clients or sales representatives. The service will provide the functionality of Fixurance tool by using any mobile devices capable of Wi-Fi, 3G or 4G.

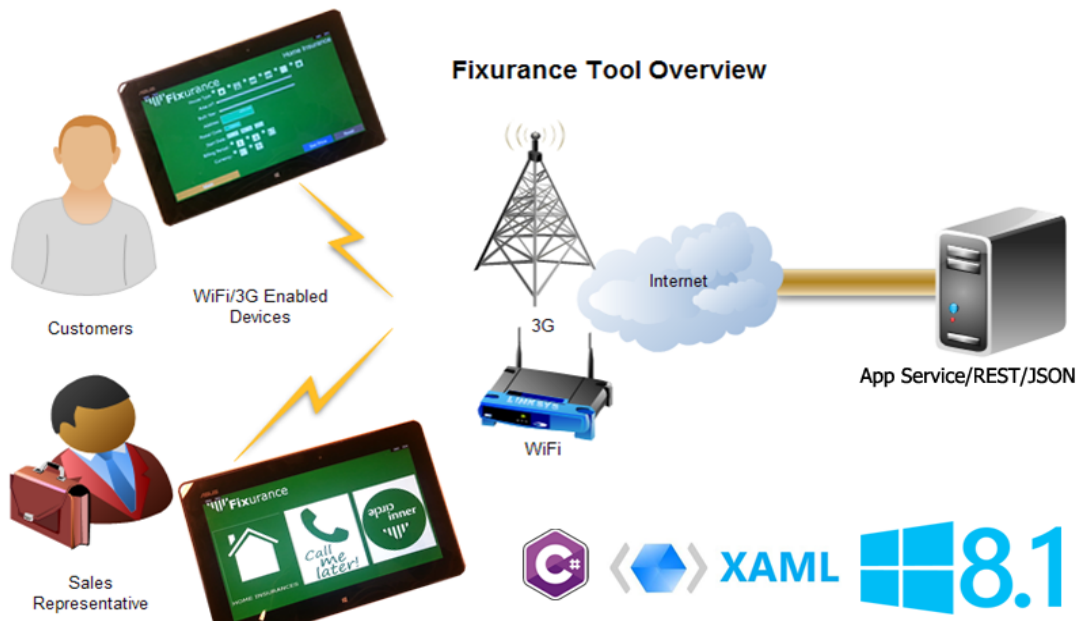


Figure 1 : The service overview of the Fixurance Tool

2.1 Service Audience

The service audiences are any users (Customers, Sales Representative etc.) who use the tool to determine the Insurance plans or quotations in real time by pricing estimations. Any users with mobile devices with Internet connectivity, 3G/4G or Wi-Fi enabled are the potential users. The customers have the opportunity to access from their own devices to use the services to retrieve information (Insurance price estimations, more insurance product or plan details and rewards). The types of audience are Customers, Sales Representatives and Regular users.

2.2 Development Technologies

For the code camp requirements, we have developed the application by using:

- The logic of the application using C#.
- The User Interface using XAML.
- Visual Studio 2013 as IDE.
- REST JSON to post and get the data (price) from the LTC-OTSO server.
- INKScape for drawing the icons.
- Adobe Photoshop for creating the poster.
- GitHub as versioning tool. The packages Git Linkit is at : <https://github.com/mdelsan/FixuranceProject.git>

2.3 Service Enhancing Technologies

The functionality than possible to enhance the service technologies as follows:

- Real-time mapping
- GPS position setting
- Different levels of service

2.4 Application Functionality

The application will be able to provide the capability of the business cases needs to:

- Implement mobility in sales process.
- Support Partner Network sales in malls or events.

- User-friendly UI and brief interactions with the prospect customers.

2.5 Justification for the aforementioned choices

The development tools can be considered as easy to learn and improved technology especially in the design issues. This tool capable to provide multiple functions, easy to use and learn with interface supports. The tablet, a mobile device can provide multiple uses especially in usability, availability and economical access to equipment.

3 Technical Specifications

3.1 Business Cases

In the LTC-Otso business cases, there are three use cases in priority are presented as below:

Priority 1 – Home Insurance (Highest priority)

Collect minimum information to estimate the insurance plan when customer has time.

Priority 2 – Collecting Sales Leads (Medium priority)

Collect minimum information to call back later function when the customer is in hurry. Which the sales representative will call back based on the information of hours and time to contact and insurance needs (Home, Health, Vehicles, Life, Infant and Pets)

Priority 3 – Customer Loyalty Programme (Lowest priority)

Offer loyalty program or rewards package for the registered customers.

3.2 Goals

The main goal was to develop simple form through which the customer or a sales representative is able to calculate the insurance price for a house. In addition, a simple form is developed to be contacted later by a sales representative and be informed about the products.

S/N	GOAL	Implemented
1	Main GUI prototype	Yes
2	Show the pricing estimations using REST	Yes
3	Call me later feature	Yes
4	Inner Circle (loyalty program)	Yes
5	Application prototype	Yes

Table 1: The Goals of Fixurance Tool

3.3 The Use Cases

Fixurance tool has only one user group that consists of the Prospect Customers and Sales Representative. The use cases are available in Appendix I.

4 Implementation Plan

Considering the complexity and the time constraint, the following features were developed by phases (features) until the last day of coding period during code camp and the extra time 7 days after our presentation.

4.1 SCRUM Development Process

We are using SCRUM development process as shown in Picture 1. One of the key factors to make sure this project successful is by defining work distribution. This means each members of the team had his own area to focus at. Of course these responsibilities might be overlapping because not all of the members have enough time to study the method especially in coding part.

TUESDAY 26 th MAY		
	Name	Estimated
Do the icons (inkscape)	M	5h
Do the main interface	N	2h
Do house interface	N	2h
Do estimation interface	A	2h
Logic for calculating price	A	3h
Do acceptance interface	M	1h
SET UP THE PROJECT (GIT)	MAN	1h
create basic template	AN	3h

Picture 1: The example of the Task Division in developing Fixurance Tool

4.2 The features

The main features of the tool and their priorities are as shown in the table 2 below. The screenshots are shown in Appendix II.

S/N	FEATURES	Priority
1	Main Page	5
2	Collecting information GUI	5
3	Coding calculations	4
4	Show the pricing estimations	5
5	Creating schedule appointment	5
6	Call me later page	2
7	Call me later database	2
8	Creation of icons and layouts	5
9	Fixurance Inner Circle Page	1
10	Fixurance Inner Circle Database	1
11	Fixurance Inner Circle Database REST	1
12	Sharing buttons of Fb, Twitter, Ig, WhatsApp	1
13	Idea of attracting Customers	1

* 5 = most critical or 1 least critical features

Table 2: The Features of Fixurance Tool

4.3 The difficulties and features for future improvement

- We did not have time to create the Lead program (Inner Circle feature). This feature would consist on asking the ID to the customer and suggest him how to reduce the price of his insurance.
- Facebook and Whatsapp share buttons.
- RFID reading.
- Create one new feature where the client/sales representative receives an accurate price depending on the client's necessities.
- Contracts can be digitally signed with digital signature.
- GPS Setting/Geolocations address mapping
- Introductory multimedia or games to attract customers

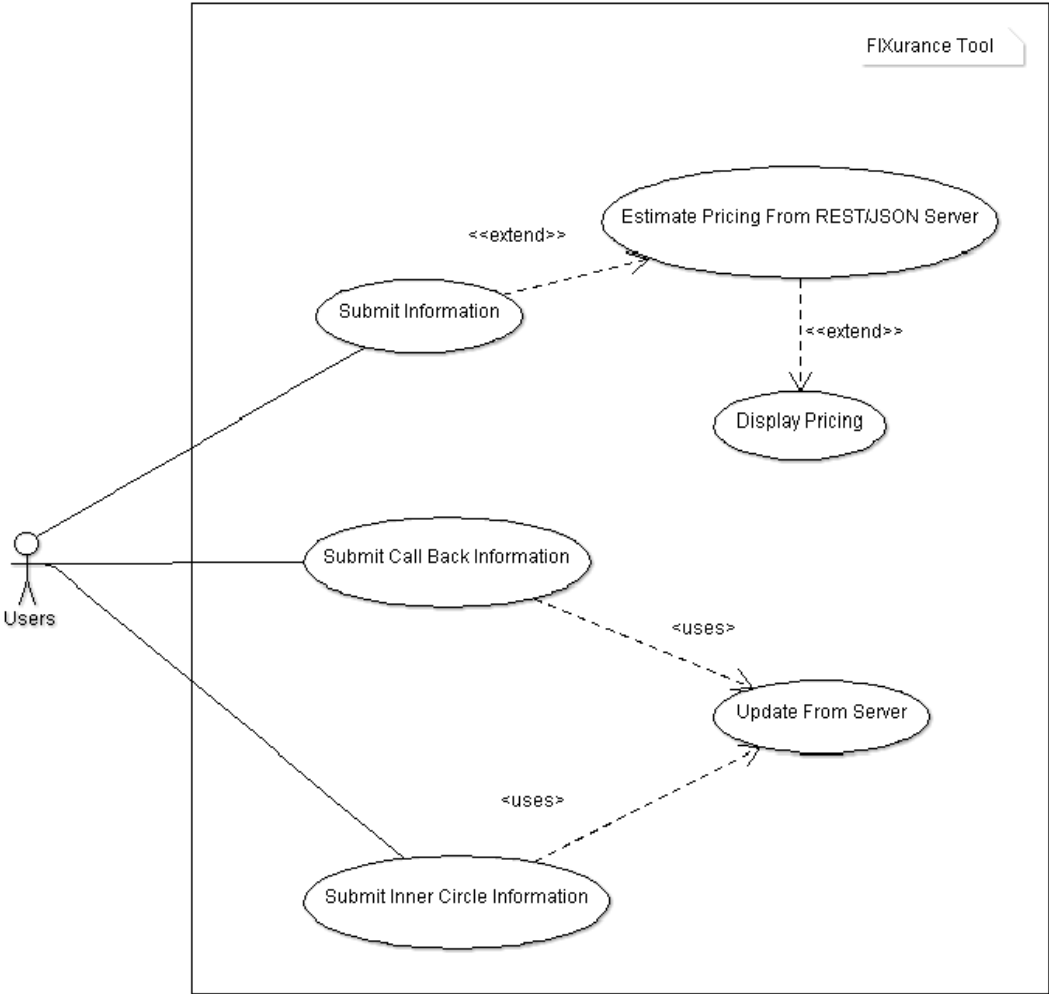
5 Roles of the Team Members

Considering the complexity and the time constraint, the following features were developed by the task divided among the team members using SCRUM methodology. We have a great experience and code camp spirit even though we were from different backgrounds and skills. It was our first experience with Microsoft Visual Studio 2013 using C# and XAML. The environment is intuitive and easy to configure and learn. We learned and explored a lot in using the tools and techniques for the project with the support from the instructors and internet browsing. However, the learning curve has been exponentially and we reached the goal in completing the code camp requirements and the business case challenges. Fixurance application could be improved and developed to the real software for future purposes such as adding more fun and interactive interactions such as games and multimedia to attract the customers to buy the product. We also have been thinking to add geolocation features but not implemented it due to lack of time. We have an enjoyable time in this code camp and learnt a lot even though we have just known each other for few days during code camp.

References:

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Appendix I: The use case overview of the Fixurance Tool



Appendix II: Screenshots of the tool features

1. Main page



2. House form to get a price estimation.

The screenshot shows the house form for getting a price estimation. The form includes the following fields and options:

- House Type: House Apartment Office Shop Warehouse Other
- Area m²:
- Built Year:
- Address:
- Postal Code:
- Start Date:
- Billing Period: 1 4 12
- Currency: € \$

Buttons: Main, Get Price, Reset

3. Price screen.

The screenshot shows the price screen displaying the estimated price. The price is 224.59 €. Below the price, the input fields are summarized:

House Type	61.0	1992
Postal Code	Punkkerikatu 7 B	
Start Date	12	

Buttons: Main, Agree, Modify

4. If the user agrees to be contacted later, he (or the sales representative) can fill in the form.

The screenshot shows a green-themed web form titled "Data of the client" for Fixurance Home Insurance. The form includes input fields for "First Name" (Manuel), "Last Name" (Dejaco), "Email" (myemail@lut.fi), and "Phone" (04691234567). Below these are radio button options for "Contact Hour" and "Preferred Time", each with three icons representing different time slots. At the bottom, there is an orange "Main" button, a blue "Send Data" button, and a grey "Reset" button.

5. Confirmation page of the data.

The screenshot shows a confirmation page with a green background. It displays the text "Thank you for your interest Manuel" and "Here are your details". Below this, the user's information is shown in white boxes: the phone number "04691234567" and the email "myemail@lut.fi". There are also two icons representing the selected contact and preferred times. At the bottom, there is an orange "Main" button.

6. Call me later! feature. The client can indicate what he is interested in and the data will be recorded. A salesman can use that information later.

This screenshot shows the same "Data of the client" form as in step 4, but with an additional "Interested in" section. This section contains several icons representing different services or products, each with a checkbox. The checkboxes for the first three icons are checked. At the bottom, the orange "Main" button, blue "Send Data" button, and grey "Reset" button are visible.

7. Call me later! feature. Confirmation page.

Thank you for your interest in our insurances, Manuel

Here are your details

04123456789	mymail@lut.fi		
			
			