



# CGU Wireless Pilot

*CGU Wireless Using  
Isovia Mobilization Platform*

***Phase 1***

***Assessment Proposal***

21 November 2000



## TABLE OF CONTENTS

<b>INTRODUCTION.....</b>	<b>3</b>
<b>BUSINESS BACKGROUND.....</b>	<b>3</b>
<b>PROJECT MISSION AND OBJECTIVES.....</b>	<b>3</b>
<b>STATEMENT OF WORK.....</b>	<b>4</b>
SCOPE.....	4
DELIVERABLES.....	6
SCHEDULE.....	6
ASSUMPTIONS.....	6
CONSTRAINTS.....	7
CLIENT OBLIGATIONS.....	7
STAFFING PLAN.....	7
PROJECT BUDGET.....	8
<b>PROJECT PERFORMANCE APPROACH.....</b>	<b>9</b>
PROJECT PLANNING.....	9
PROJECT EXECUTION.....	9
CHANGE MANAGEMENT.....	9
CHANGE IMPACT ANALYSIS.....	9
ISSUE MANAGEMENT.....	10
PROGRESS MANAGEMENT AND KNOWLEDGE TRANSITION.....	10
<b>PROPOSAL ACCEPTANCE.....</b>	<b>11</b>

## INTRODUCTION

The purpose of this document is to define the scope of Phase I (Pilot Implementation) of the CGU Wireless Initiative. This document builds on the Discovery Session facilitated by Isovia at CGU on November 14<sup>th</sup>, 2000. In addition to background information, this document describes the Statement of Work and the Project Plan for Phase I.

During the Discovery Session, Isovia determined the CGU Architecture is sufficiently robust and scalable to support wireless initiatives. The robust and scalable design of the CGU Architecture provides multiple options for future wireless initiatives. Phase I will help CGU determine the scope of future enterprise wireless implementations.

## BUSINESS BACKGROUND

CGU, headquartered in Boston, Massachusetts, operates in all 50 states and is supported through 44 offices in 13 regions. The 16th largest insurance group in the United States, CGU has more than \$4 billion in property/casualty premiums. CGU offers a wide range of personal, commercial, specialty, and life products and services, which are sold exclusively through more than 7,100 property/casualty and 7,500 life independent producers.

CGU is owned by CGU PLC, headquartered in London, England, with operations in more than 60 countries throughout the U.K., Europe, North America and Asia. CGU is one of the largest life and general insurers in the U.K. and one of the largest insurance groups in the world, with global revenues in excess of \$26 billion.

CGU is requesting a wireless solution be developed that will enable remote access to its private insurance data by third parties. CGU has a pre-existing application environment that it wishes to leverage in this endeavor. Utilization of this environment will also serve as a 'proof of concept' for the robustness and flexibility of the current architecture.

The first wireless application will be Claims Inquiry. This application will allow remote users the ability to use any of several wireless devices to access the system and drill down to the 'feature' level of the current web application that CGU developed.

## PROJECT MISSION AND OBJECTIVES

In order to accomplish the objectives of this project, the CGU wireless initiative will be addressed in a phased approach as follows:

Phase 0 - Discovery process-Isovia has successfully completed this process.

Phase 1 - Pilot wireless application development

Phase 2 - Development of a wireless roadmap for merging current CGU applications to wireless solutions strategic assessment of CGU infrastructure for future enterprise wireless development.

Phase 3 - Development of additional wireless integration.

## STATEMENT OF WORK

### Scope

The initial phase of the project is to develop a pilot application for Claims Inquiry, which a select number of users can access using a wireless device. The particular application will support 3 types of claims inquiry:

1. Search by Claim Number
2. Search by Claimant Last Name
3. Search by Insured Last Name

The application will provide a Search Results page for each of the second and third types of claims searches. Upon selection of a particular claim the application will provide a Feature Page with specific information about the claim. The claims search will go directly to the appropriate Feature Page without a Search Results page.

The Search Results page will contain the following seven data fields:

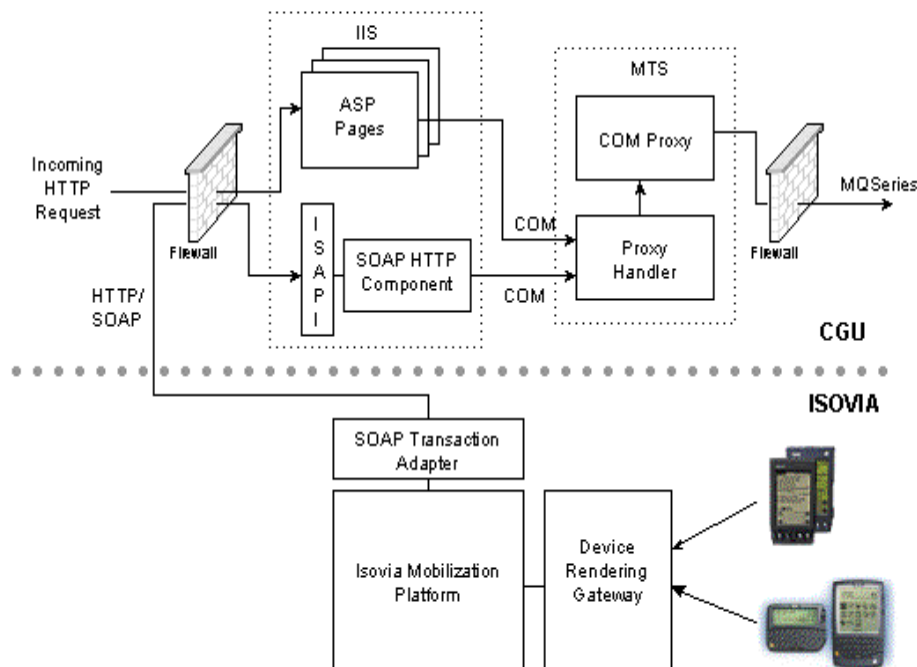
1. Claim number (with link to Feature Page)
2. Name
3. City / State
4. Policy number
5. Policy period
6. Loss date
7. Claim status

The Feature Page will be accessed directly from the claim number search, or by link from the Search Results page. The Feature Page will contain the following pieces of data:

1. Insured's name
2. Loss date
3. Contact date
4. Policy number
5. Policy period
6. Case status
7. Adjuster name
8. Adjuster phone
9. Date closed
10. Appraiser name
11. A listing of associated features, including for each where appropriate:
  - a. Claimant
  - b. Feature
  - c. Last payment
  - d. Amount
  - e. Total paid
  - f. Available reserve
  - g. Claim status

The application will be developed for 3 different types of wireless devices. The exact devices will be determined during the initial week of the pilot phase, but may include the following: Palm VII, RIM Blackberry, Windows CE device, WAP enabled phone.

The system integration will be enabled using a SOAP component functioning with the proxy handler. A 'spoofer' of the current environment at CGU will be used for the purposes of Phase 1. This will consist of several dll's that will provide proxy handler functionality and the use of an Excel spreadsheet for a dummy data source. The following diagram outlines the system integrations architecture:



Additional functionality outside the scope of the current proposal may be added for an additional cost. Such additional functionality may include:

1. Capability to send email directly to the adjuster listed in the Feature Page from the wireless device
2. Additional devices beyond the initial three agreed to at the beginning of the project

## **Deliverables**

The following deliverables will be provided:

1. Recommended device list
2. Formalized list of supported devices
3. Initial mock-up of screens for each supported device
4. Prototype screens for each supported device
5. Production screens and specs
6. Interface specification and architecture diagram
7. User Manual
8. Hosted application

## **Schedule**

Schedule of deliverables:

	<b>Activity</b>			<b>Estimated Start Date</b>	<b>Estimated Finish Date</b>
	Start of project			12/4/00	
	Analysis and discussion of devices			12/4/00	12/6/00
	Recommended device list			12/8/00	
	Discussion on devices			12/11/00	12/12/00
	Formalized list of devices			12/12/00	
	Initial mock up of screens for each device			12/18/00	
	Iterations and discussion on screen design and layout			12/18/00	12/22/00
	Prototype of screens for each device			1/2/01	
	Data specs for each screen			1/8/01	
	Integration spec and architecture diagram			1/15/01	
	Beta version available for testing			1/29/01	
	Delivery of production application			2/15/01	
	User manual			2/15/01	

## **Assumptions**

As this project is in its very early stages, certain necessary assumptions were made to complete this statement of work.

These assumptions are as follows:

- 1) Phase I will commence on December 4<sup>th</sup>, 2000 and will finish on February 15<sup>th</sup>, 2001.
- 2) The initial deliverable will be a wireless application allowing remote claims inquiry to the 'feature level' of the current web-based application developed by CGU. This wireless solution will be available on

three wireless platforms. Additional functionality will be addressed at a later date and is currently beyond the scope of this statement of work.

- 3) The ability to 'spoof' the local hub area of CGU's current application will allow seamless integration of the actual application once security permissions are granted.
- 4) Suzanne H. Walker of CGU will be available as a resource for the wireless effort as required.
- 5) CGU will provide an adequate replica of the local hub, which will allow integration with data provided by an Excel spreadsheet.
- 6) CGU will be able to provide the Excel spreadsheet for data mimicking.
- 7) Appropriate personnel resources will be provided by CGU for technical support of the current web-based application.
- 8) The wireless devices selected for Phase 1 of the project must contain wireless Internet browsers on the device capable of supporting the desired functionality.

### ***Constraints***

Constraints known at the writing of this document are as follows:

- 1) At this time, CGU has not purchased the wireless devices for the pilot users.
- 2) CGU has not identified a Project Manager for the pilot project.

### ***Client Obligations***

The following client obligations refer to the CGU facility at One Constitution Way, Foxborough, Massachusetts 02035-2661.

- 1) CGU will need to provide the required wireless devices for the pilot project.
- 2) CGU will need to provide access to the Claims Inquiry application.
- 3) CGU will need to provide answers to questions in a timely fashion.
- 4) CGU will need to provide workspace including conference rooms and access to CGU systems to Isovia team members as necessary.

### ***Staffing Plan***

The following roles will be required for the Assessment effort. They are being presented with the assumption that Isovia resources would be needed. However, there is a serious need for CGU staff to be closely involved. Phase I is very client intensive. Only CGU resources know the details of the business and the requirements, and only CGU resources can make judgments on scope, etc. For this reason, some time is budgeted during Phase I in order to reflect this reality.

#### CGU Project Manager

This will be a leadership person to coordinate all project activities that require involvement from CGU staff or resources. This person will also be needed to approve direction and assist with setting up internal meetings, in addition to contributing to the content of the planning effort. It is estimated that 4-8 days of

this person's time will be needed to allow for meetings, contributions to the planning and scoping, and to allow for some knowledge transfer from Isovia.

#### CGU Subject Matter Experts

As needed, and as determined by the CGU Project Manager, key resources within CGU will be required to provide input to the scoping and planning process. These are resources that will be either be interviewed or asked to attend facilitated sessions. It is estimated that a total of about 9 workdays of effort will be required from various CGU resources (in total, not from each resource).

#### Isovia Engagement Manager

This person is the Director of all solution delivery for the wireless pilot project. The Engagement Manager will be responsible for coordinating the efforts of the CGU Project Manager and the Isovia Project Manager. The Engagement Manager will work directly with CGU's executive sponsor to help ensure client satisfaction.

#### Isovia Project Manager

The Isovia Project Manager will be responsible for all of the day-to-day activities of the pilot project. This person will manage project plans, tasks, and milestones for the project. The Isovia project manager will be responsible for weekly status reports and client briefings.

#### Isovia Solutions Architect

The Isovia Solutions Architect will be responsible for the integration of CGU's Claim's Inquiry application to the Isovia Wireless Platform. This person will also be responsible for the task management of the Isovia Development Team.

#### Isovia Development Team

Technical staff responsible for development of software and integration of Isovia Wireless Platform

### ***Project Budget***

Isovia Wireless Platform Licensing	\$150,000
Professional Services:	\$80,000
Integration Team:	
• Isovia Engagement Manager	
• Isovia Project Manager	
• Isovia Solutions Architect	
• Isovia Development Team	

**TOTAL COST** **\$230,000**

The cost of additional functionality outside the current scope of this project can be negotiated. We have specified the cost of two possible requests:

- The cost for the capability to send email to the adjuster listed in the Feature Page from the wireless device will be \$20,000.
- The cost for the integration of a fourth wireless device will be \$15,000.

## PROJECT PERFORMANCE APPROACH

Isovia will be employing a modified version of a standardized project methodology for this wireless development project.

Project Management is an integral part of all project phases. Isovia has developed a Project Management framework that integrates critical project management components into any project without adding unnecessary overhead to the project's total effort. Isovia uses integrated and customized automated tools to help track, measure, and report on the critical activities that comprise the framework. A brief description of the framework follows:

### ***Project Planning***

The overall objective of the Project Planning process is to establish the resources, mechanisms and procedures that will facilitate management during the duration of the project.

### ***Project Execution***

The processes within Project Execution that are listed below apply to the four components of a project that are managed throughout the effort. These four components are:

- Content (what Isovia will deliver),
- Schedule (when CGU expects delivery),
- Resource (what (and whom) will be used to deliver the results) and
- Cost (budget constraints and maintenance).

### ***Change Management***

As time passes within the project, the knowledge of the project participants and project sponsors increases. This increased knowledge drives the request for changes. Isovia's Change Management process permits modification of deliverables after a baseline has been established. This baseline represents the products and/or services that would have been delivered per the schedule had no change occurred. Setting a baseline helps to control the impact of change. Setting the baseline occurs normally at the point the deliverable is required as input to another process (e.g., a specification is used to create a program). Prior to this point, the cost of change is minimal and can be encouraged in order to avoid later, more costly, modification. After this point change will still occur but its impact must be assessed and the client must agree to proceed with the change. If the change is approved then it must be understood that the baseline itself changes. Change also affects other components (Schedule, Resource and Cost) independently of the Content change.

Each change request will be maintained in a central tracking system that will be available to all CGU and Isovia team members. While a change log may be maintained in Word, Access or other desktop tool, the use of change management tools (such as PVCS Tracker) is recommended. A history of change requests will be maintained for the duration of the project effort. Any change request that will alter expectations or deliverables will be documented in writing following any verbal communication. The quality of the description plays a large part in analyzing impact and thereby the decision to approve or reject the change. The generating individuals may be members of the project team. All problems and requested improvements should be logged, even though the existence of a change request does not guarantee its completion.

### ***Change Impact Analysis***

Any change has some impact on the project plan (schedule) and budget. This change may be favorable in that it decreases the time and cost to deliver or it may increase the time and cost to deliver. The impact of the change request will be estimated to facilitate decision-making. The following items will be evaluated during the change impact analysis:

- Determine Feasibility of Change
- Estimate impact to the Schedule
- Estimate impact to the Cost
- Estimate impact to the Deliverables
- Estimate impact to the Resources
- Determine whether the impact affects the critical path of the project

Change requests will be reviewed by the project team (to determine feasibility) and by CGU to determine priority and cost effectiveness. A change may have two separate impacts on schedule and budget. One is the direct impact of the work and time required to implement the request. The second is the time delays introduced into the original schedule as the new change is assimilated into the project.

### ***Issue Management***

During the project execution, issues will arise. The issue management process defines a method to capture, track and maintain and facilitate issue resolution. Issues can surface as a result of a new business process or a change in business direction.

Each issue will be maintained in a central tracking system that will be available to all CGU and Isovia team members. The issues log may be maintained in Word, Access or other desktop tool however, PVCS Tracker is highly recommended to maintain this log if it is available. A history of issue resolution will be maintained for the duration of the project effort.

CGU is responsible for identifying a single point of contact to be responsible for issue management. The single point of contact may be a single person or a single committee. In either case, the designee should be someone with approval authority

### ***Progress Management and Knowledge Transition***

Project progress will be monitored throughout the project against the project plan and by means of periodic status reports and meetings. CGU personnel will be included in the project. Documentation and a repository will be developed so that continuous knowledge transfer is achieved.

## PROPOSAL ACCEPTANCE

We at Isovia Inc. thank you for giving us this opportunity. We look forward to a mutually beneficial and enduring relationship between our organizations, predicated on our understanding of the requirements for CGU.

Information contained in this proposal is the exclusive property of Isovia Inc. (Isovia). The material contained herein may not be disclosed or duplicated, in whole or in part, by other than CGU's personnel, who have a need to know, for other than evaluation purposes, without prior written approval of Isovia.

The proposal and pricing contained herein shall remain in effect for a period of thirty (30) days from the date of this proposal. All provisions and pricing are subject to change by Isovia if not accepted within the 30-day period.

We are prepared to commence this project on or about December 4th, 2000. To signify your approval of the content of this proposal and your authorization for us to proceed, please provide an authorized signature below and return one executed copy to our office.

---

Accepted for CGU Company

---

Date