Chubb Target Audience Needs

by Stu Young 7/28/09

Target Audience Group	Page	Main reason for coming to this page	Key Information target audience needs on this page					Information target audience does not need on this page
			Most important info	2nd most important info	3rd most important info	4th most important info	5th most important info	
Branch Underwriters	home page	This will be the page where the users will come first and get a snapshot of all the information that is necessary for them to do their job.	To dos and action items -- these can be things that they assign themelves, or are assigned to them by their managers and peers, or through the workflow. Each action will contain links to the	Their Alerts -- things that they need to be notified about, but do not necessarily need any actions to be taken by them.	Ability to have quick access to the tools that they will need to do their jobs -- tools such as calculators, links to corporate Intranet tools, company websites	Information about their portfolio of accounts and agencies -- a summary of information about their customers	Information about specific Bonds that they are interested in without having to open up each individual bond or account profile information across their portfolio	Bond level information and account level information
	Accounts	This will be the page where the users will be able to view their portfolio of accounts and agencies. Should contain a summary of portfolio level information across their accounts	Number of accounts, top producers, most profitable accounts, accounts that need an action to be taken	Ability to search and get to account level information quickly	Alerts on the account level such as Claims, action needed because of Bond activity			
	Specific Account	To look at a specific account information and be able to drill down to Bonds by Account	Information about update to accounts (such as Service Authority expiring/ Claims activity) and actions due to be taken on accounts.	Ability to request a Bond, with access to underwriting tools such as Rate Calculator, PEL, ICR, RiskCalc, Exposure	Documents and attachments that are available for the account, categorized by the type of document (Financials, indemnity, collateral, corresppondence etc.	Access to all Bond Requests for the account	Account Profile -- how the account is set up, principals, ~~Last review of the account,~~ largest job done, Exposure, PAR, link to Financials, WIP. etc. and Service Profile	
	Bonds	To look at a specific Bond information	Search and retrieve specific Bonds	Data abolut the Bond itself with a link to the actual Bond Document, correspondence				