

DESIGN PROJECT

Asmita Misra for BriteCore

04/03/2018

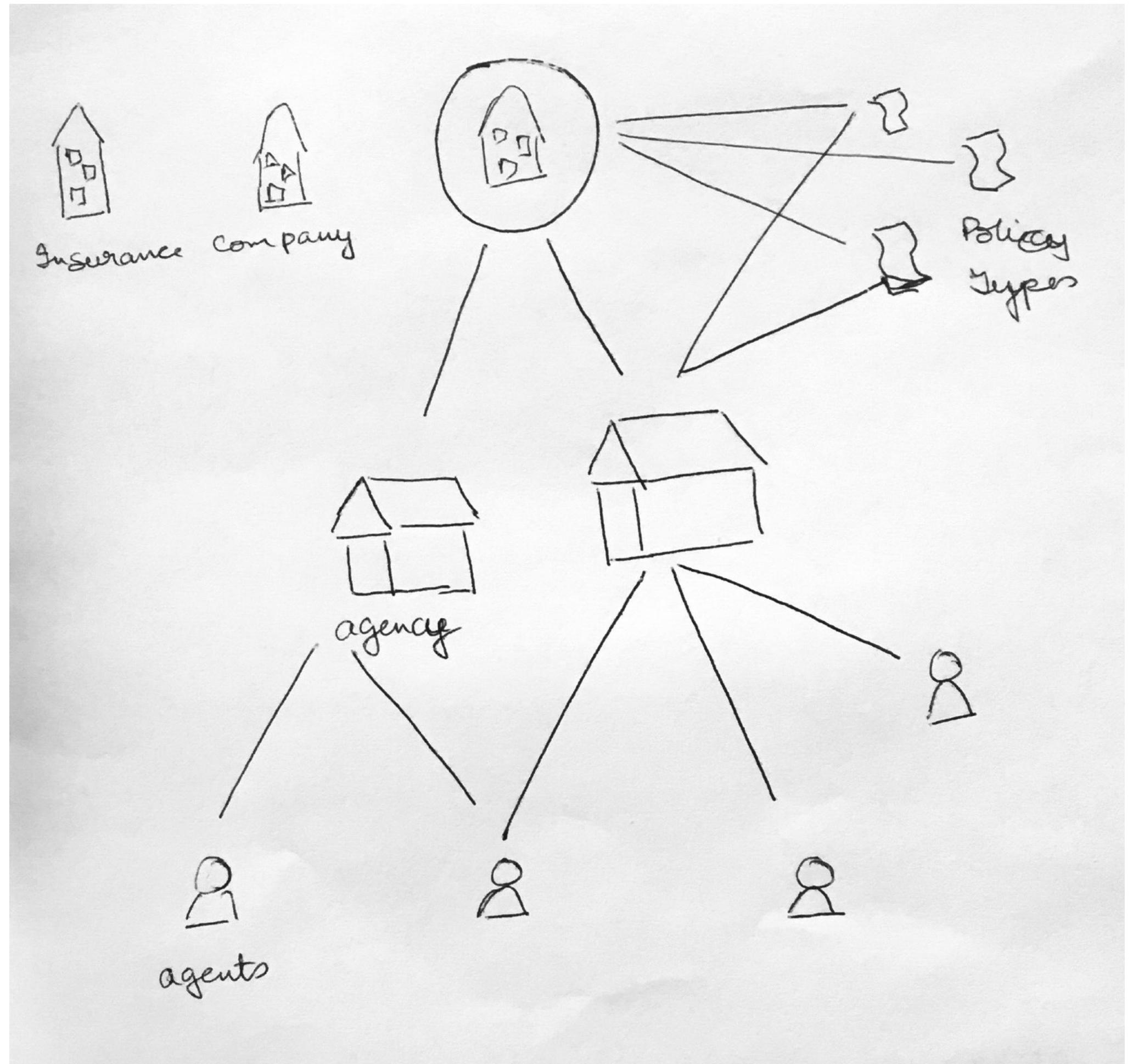


#1 THINKING OUT LOUD

Agents management for Insurance Carriers

UNDERSTANDING THE STRUCTURE

- Agents
- Agencies
- Carriers (insurance companies)
- Policy types
- Areas of operation



GOAL

- An *intuitive* platform design that incorporates advanced features for insurance companies along with the standard contact information that BriteCore already displays for agents and agencies.

ASSUMPTIONS

- User is “Admin” and has access to all details about every Agency, Agent
- User is monitoring Agents, Agencies to make sure their info is updated
- License Data is added/edited in this tool and not uploaded/synced from elsewhere
- Companies typically have a large number of agencies signed on with many agents in them rather than individual direct agents (if any)

EMPATHY MIND MAP OF A USER OF BRITECORE

- Primary Goals:
 - I want a dashboard that shows me how my agents/agencies are performing, how many claims I have settled this year and how many are pending. (other aims..?)
 - Add, edit, view my lines of business
 - Add, edit, view the agencies and agents signed on with me and their licenses. (contacts)

CONTACT PAGE

- An expandable list of agencies along with a snapshot of some of the details:
- performance score (or claims processed? - inversely proportional)
- no of lines of business authorized for
- no of states operating in
- no of agents signed on
- contact information of the agency

BRITE CORE

xxxx	xxxx	CONTACTS	xxx	xxx	xxx																																										
ADD AGENCY																																															
ADD AGENT																																															
xxxx	xxxx																																														
LICENSE INFO																																															
ADD EDIT																																															
<table border="1"> <thead> <tr> <th>AGENCIES</th> <th>PERFORMANCE Score</th> <th>AUTHORIZED LINES</th> <th>AUTHORIZED No of STATES</th> <th>No of Agents</th> <th>Contact Located</th> </tr> </thead> <tbody> <tr> <td>□ JACK PARTNERS</td> <td>98</td> <td>7</td> <td>25</td> <td>134</td> <td>TENNESSEE</td> </tr> <tr> <td>□ JANE PARTNERS</td> <td>76</td> <td>6</td> <td>20</td> <td>111</td> <td>WASHINGTON DC</td> </tr> <tr> <td>□ JILL PARTNERS</td> <td>75</td> <td>6</td> <td>13</td> <td>67</td> <td>ATLANTA</td> </tr> <tr> <td>□ JUNE VENTURES</td> <td>66</td> <td>5</td> <td>5</td> <td>85</td> <td>SAN FRANCISCO</td> </tr> <tr> <td>□ PEACH PEOPLE</td> <td>63</td> <td>4</td> <td>8</td> <td>81</td> <td>DELAWARE</td> </tr> <tr> <td>:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>						AGENCIES	PERFORMANCE Score	AUTHORIZED LINES	AUTHORIZED No of STATES	No of Agents	Contact Located	□ JACK PARTNERS	98	7	25	134	TENNESSEE	□ JANE PARTNERS	76	6	20	111	WASHINGTON DC	□ JILL PARTNERS	75	6	13	67	ATLANTA	□ JUNE VENTURES	66	5	5	85	SAN FRANCISCO	□ PEACH PEOPLE	63	4	8	81	DELAWARE	:					
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Tabbed navigation, (but would like a dedicated left side nav - expandable)

Section meta actions nested on left panel

Not sure why I made it into a checkable list, not sure if list actions are available

BRITE CORE																																																	
xxxxx	xxxxx	CONTACTS	xxx	xxx	xxx	xxx																																											
ADD AGENCY		AGENCIES																																															
ADD AGENT		PERFORMANCE AUTHORIZED Authorization of No of Contact Score LINES STAFFS Agents Located																																															
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List of agencies with snapshot of info for each

List of agents with snapshot info (yet to decide between changing column info alignment to keep similar to agency or differentiating enough to not confuse user)

AGENCY PAGE

- Detailed view of an agency
 - Detailed contact info of representatives and agency.
 - Segments or tabs of Authorized lines, Authorized state wise licenses and a list of agents.
 - (can the Lines and Statewise Licenses be mapped into a single info block? would it be too overwhelming?)
 - Do authorized lines also have dates of issue and expiry?

BRITE CORE				
xxxx	xxxx	CONTACTS	xxx	xxx
AGENCIES → JACK PARTNERS				
B TERRY TOMAS OR REPRESENTATIVE +1 906 600 3482		JACK PARTNERS 210, 7 TH ST TENNESSEE - 1000		
AUTHORIZED LINES	ISSUED	EXPIRY	MODIFY	
HOMEDOWNERS				
FARM OWNERS				
COMMERCIAL				
DWELLING FIRE POLICIES (RENTAL)				
LIABILITY PROTECTION				
AUTOMOTIVE				
INDUSTRIAL				
AUTHORIZED STATES WISE LICENSE				
LINES OF AUTHORITY	CLASS	ISSUED	EXPIRY	MODIFY
NORTH CAROLINA				
ACCIDENT, HEALTH & KNESS	INSURANCE PROVIDER	05/12/2014	05/11/2020	<input checked="" type="checkbox"/>
PROPERTY	INSURANCE PROVIDER	07/01/2016	07/01/2022	<input checked="" type="checkbox"/>
—				
—				
+ ADD NEW LICENSE				
SOUTH DAKOTA				
HAIL ADJUSTER	HAILADJUSTER	11/13/2013	11/12/2019	<input checked="" type="checkbox"/>
—				
—				
+ ADD NEW LICENSE				
AGENTS				
	LICENSE STATUS	ISSUED	EXPIRY	MODIFY
TAMES POTTER	<input checked="" type="checkbox"/>	05/05/2013	05/05/2016	<input checked="" type="checkbox"/>
TINA FEY	<input type="checkbox"/>	03/25/2013	03/24/2016	<input checked="" type="checkbox"/>
—				
—				
—				
—				
+ ADD NEW AGENT				

Breadcrumb navigation
into a specific agency

Representative and
contact info details

List of Authorized
Lines of Policy with
issue date, expiry date
and edit options

BRITE CORE		xxxx	xxxx	CONTACTS	xxx	xxx	xxx
AGENCIES → JACK PARTNERS							
8 TERRY TOMAS OR REPRESENTATIVE +1 906 600 3482				JACK PARTNERS 210, 7TH ST TENNESSEE - 10001			
AUTHORIZED LINES	ISSUED	EXPIRY	MODIFY				
HOMEOWNERS							
FARM OWNERS							
COMMERCIAL							
DWELLING FIRE POLICIES (RENTAL)							
LIABILITY PROTECTION							
AUTOMOTIVE							
INDUSTRIAL							

AUTHORIZED STATES W/ LICENSE

LINE OF AUTHORITY	CLASS	ISSUED	EXPIRY	MODIFY
ORTH CAROLINA				

Maybe top tabs here
with the following 3
sections

List of Licenses
currently held by the
agency

List Segregated by
State

Contextual ability to
add new license per
state

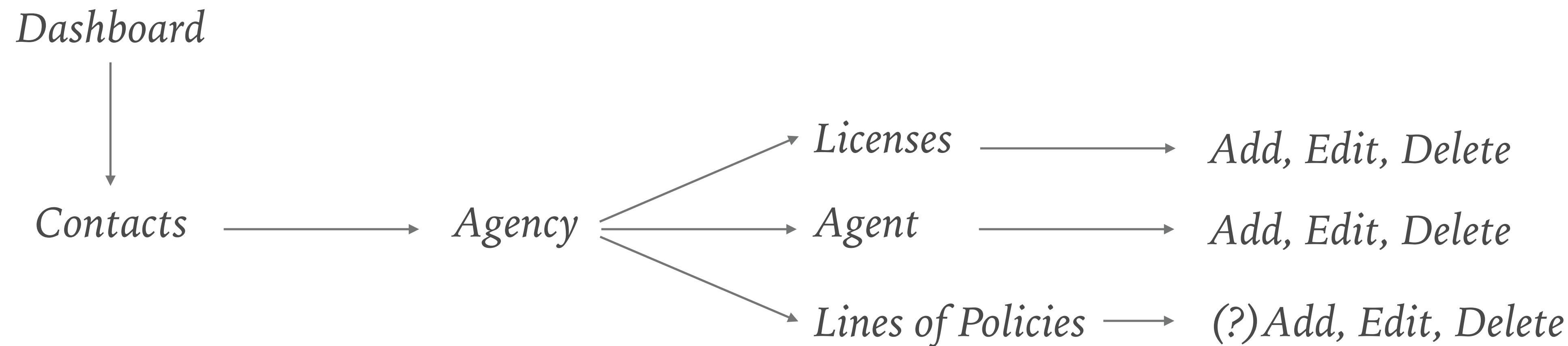
AUTHORIZED STATES WKE LICENSE				
MANAGEMENT				
LIC OF AUTHORITY	CLASS	ISSUED	EXPIRY	MODIFY
NORTH CAROLINA				
ACCIDENT, HEALTH & LIFE	INSURANCE PROVIDER	05/12/2014	05/11/2020	<input type="checkbox"/>
PROPERTY	INSURANCE PROVIDER	07/01/2016	07/01/2022	<input type="checkbox"/>
ADD NEW LICENSE				
SOUTH DAKOTA				
HAIL ADJUSTER	HAILADJUSTER	11/13/2013	11/12/2019	<input type="checkbox"/>
ADD NEW LICENSE				

List of Agents
Associated with this
agency along with
license status and
related data

AGENTS		LICENSESTATUS	ISSUED	EXPIRY	MODIFY
JAMES	POTTER	<input checked="" type="checkbox"/>	05/05/2013	05/05/2018	 
TINA	FETT	<input type="checkbox"/>	03/25/2013	03/24/2018	 
-	-	-	-	-	-
-	-	-	-	-	-
 + ADD NEW AGENT		-	-	-	-

Contextual ability to
add new agent per
agency

PRODUCT FLOW



QUESTIONS

- How is the typical agent workforce for an insurance company structured? Does a company have more number of agencies representing a vast number of agents? Or do they more number of directly employed agents?
- Does an Agent have a single license, that makes him/her eligible to represent all of the company's products? Or does he/she have multiple licenses, each aimed at certain product?
- Is there any way of mapping the licenses per state that an agency has to the different policy lines they can represent? Would this be valuable to the person using this tool?

ANSWERS

- How is the typical agent workforce for an insurance company structured? Does a company have more number of agencies representing a vast number of agents? Or do they more number of directly employed agents? More agencies than agents
- Does an Agent have a single license, that makes him/her eligible to represent all of the company's products? Or does he/she have multiple licenses, each aimed at certain product? Yes, multiple licenses but at the moment showing only 1.
- Is there any way of mapping the licenses per state that an agency has to the different policy lines they can represent? Would this be valuable to the person using this tool?
- illustrated on next slide for seeking answer

AGENCIES → JACK PARTNERS

A TERRY TOMAS SR. REPRESENTATIVE +1 106 600 3482	JACK PARTNERS 210, 7 th ST TENNESSEE - 10001
--	---

LINES & LICENSES

AGENTS

Segregated by
states

NORTH CAROLINA

✓ HOME OWNER'S POLICIES	✓ INSURANCE PROVIDER - PROPERTY, ✓ INSURANCE PROVIDER - LIFE, ✓ LIMITED REPRESENTATIVE - OTHER LIMITED LINES, ✓ HAIL ADJUSTER - HAIL ADJUSTER	EDIT DOWNLOAD xxx
	✓ XXXXX ✓ XXXXX	
✓ XXXXXXXX XXXAxx	✓ XXXXX	

SOUTH CAROLINA

✓ XXXXXAxx

AGENCIES → JACK PARTNERS

A TERRY TOMAS SR. REPRESENTATIVE +1 106 600 3482	JACK PARTNERS 210, 7 th ST TENNESSEE - 10001
--	---

LINES & LICENSES

AGENTS

HOME OWNER'S POLICY

OR

Segregated by lines
of policy

NORTH CAROLINA	✓ INSURANCE PROVIDER - PROPERTY, ✓ INSURANCE PROVIDER - LIFE, ✓ LIMITED REPRESENTATIVE - OTHER LINES, ✓ HAIL ADJUSTER - HAIL ADJUSTER	ACTION 1 ACTION 2 ACTIONS
	✓ XXXXX ✓ XXXXX	
SOUTH CAROLINA	✓ XXXXX ✓ XXXXX	:
	!	

FARM OWNER'S POLICY

!

VXXXXAxx

AGENCIES → JACK PARTNERS

A TERRY TOMAS SR. REPRESENTATIVE +1 106 600 3482	JACK PARTNERS 210, 7 th St TENNESSEE - 10001
--	---

LINES & LICENSES

AGENTS

Segregated by
states - works!

NORTH CAROLINA

✓ HOME OWNER'S POLICIES	✓ INSURANCE PROVIDER - PROPERTY, ✓ INSURANCE PROVIDER - LIFE, ✓ LIMITED REPRESENTATIVE - OTHER LIMITED LINES, ✓ HAIL ADJUSTER - HAIL ADJUSTER	EDIT DOWNLOAD xxx
✓ xxxxxxx xxx1x	✓ xxxx ✓ xxxx	

SOUTH CAROLINA

✓ xxxx>x	

AGENCIES → JACK PARTNERS

A TERRY TOMAS SR. REPRESENTATIVE +1 106 600 3482	JACK PARTNERS 210, 7 th St TENNESSEE - 10001
--	---

LINES & LICENSES

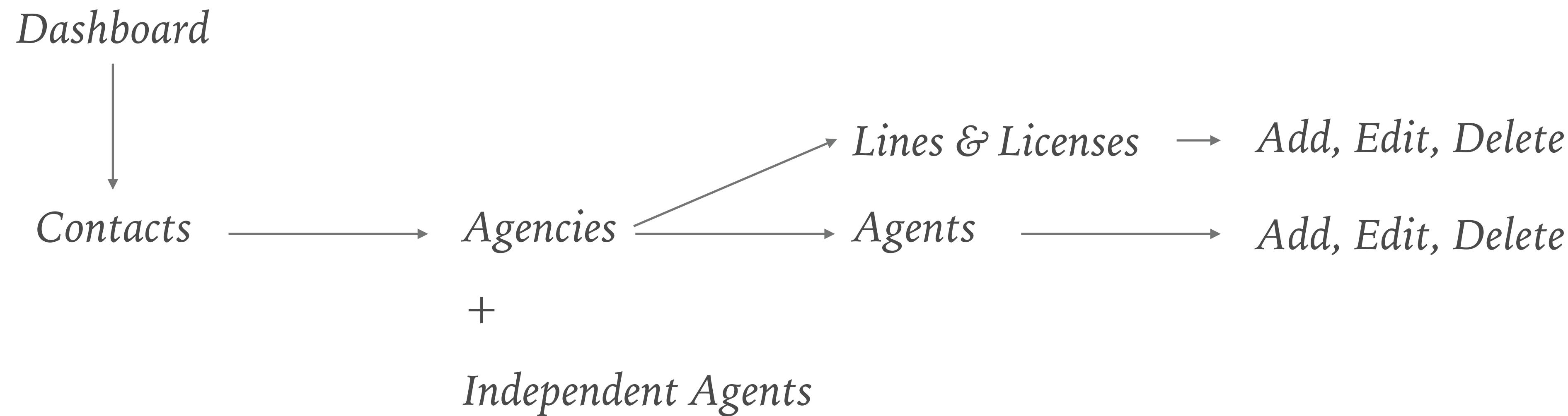
AGENTS

HOME OWNER'S POLICY

NORTH CAROLINA	✓ INSURANCE PROVIDER - PROPERTY, ✓ INSURANCE PROVIDER - LIFE, ✓ LIMITED REPRESENTATIVE - OTHER LINES, ✓ HAIL ADJUSTER - HAIL ADJUSTER	ACTION 1 ACTION 2 ACTIONS
	✓ xxxx ✓ xxxx	
SOUTH CAROLINA	✓ xxxx ✓ xx	:

FARM OWNER'S POLICY

REFINED PRODUCT FLOW



UX DESIGN PRINCIPLES EMPLOYED

- Incorporating collapsed left side navigation keeping in mind wide screen monitors used by most desk employees. limiting to two levels. if third level of nav needed then it would be used either as tabs or breadcrumb in the body page.
- Including a global search
- contextual help which may provide tips on what all can be accomplished in each page - will also be useful when introducing new features nested in deep inside the nth page & on boarding new users.
- Progressive Disclosure - for forms specifically

WIREFRAMES - CONTACTS

The wireframe shows a navigation sidebar on the left with options like Main Menu Option 1, Main Menu Option 2, Contacts (selected), Add New Agency, Add New Agent, Modify License Info, Sub Menu 4, Main Menu Option 4, and Main Menu Option 5. The main area displays a contact board with a search bar, a user dropdown (Jason O'pal), and a table of agencies and their details. A secondary table at the bottom shows direct agent information.

Agencies	Office	Ratio ▲	Lines	States	Agents
Jack Partners LLC	Washington	12	7	14	134
Intellisurance Inc	Tuscon	13	6	11	111
Insure-sure LLC	Atlanta	17	8	13	109
Brandon Partner LLC	New York	19	8	13	175
Dynamic Secure Inc	California	24	5	13	97
Differential Insurance Inc	California	36	2	5	45
Brave Insure LLC	North Carolina	39	5	12	59
Differential Insurance Inc	Idaho	42	3	7	77

Direct Agents	State	Ratio ▼	License Issue	License Expiry
Allison Smith	Washington	23	02/02/2001	02/01/2019

Use Case: View all the agencies and agents in the client's contact board.

Pros:

- Snapshot of info
- Sort by feature - applicable to any column head
- Scrollable list
- Left side navigation

Cons:

- Longer list of agencies will hide agents' list

CONTACTS

The screenshot shows a user interface for managing contacts. At the top right is a user profile for "Jason O'pal". Below it is a search bar with placeholder text "Search Anything". On the left, a sidebar lists main menu options (1-5) and a "Contacts" section with sub-options (Add New Agency, Add New Agent, Modify License Info, Sub Menu 4). The main content area displays two tables: one for "Agencies" and one for "Direct Agents".

Agencies	Office	Ratio ▾	Lines	States	Agents
Jack Partners LLC	Washington	12	7	14	134
Intellisurance Inc	Tusco	Jack Partners LLC	11	111	
Insure-sure LLC	Atlan	Address 2125, 14th Ave S Seattle 98200 Washington	13	109	
Brandon Partner LLC	New York	19	8	13	175
Dynamic Secure Inc	California	24	5	13	97
Differential Insurance Inc	California	36	2	5	45
Brave Insure LLC	North Carolina	39	5	12	59
Differential Insurance Inc	Idaho	42	3	7	77

Direct Agents	State	Ratio ▾	License Issue	License Expiry
Allison Smith	Washington	23	02/02/2001	02/01/2019

Use Case: View Agency contact details. Hover on each cell to reveal necessary details without having to click

Pros:

- Reducing clicks for some info

Cons:

- May lead to unnecessary pop ups - especially while scrolling

AGENCY DETAILS - LINES & LICENSES V1

Main Menu Option 1
Main Menu Option 2
Contacts
Add New Agency
Add New Agent
Modify License Info
Sub Menu 4
Main Menu Option 4
Main Menu Option 5

Agencies > Jack Partners

Terry Tomas
Sr Representative
+1 106 800 3488

Jack Partners LLC
2125, 14th Ave S
Seattle 98200
Washington
+1 205 777 5468
Member since 08/24/2009

Loss Ratio
\$2500000 Written Policy Premium
\$300000 Amount Paid Out

Lines & Licenses Agents

North Carolina

Policy Type	Insurance Types	Action Buttons
HomeOwner's Policy Effective: 04/04/2013 Expiry: 04/03/2019	✓ Insurance Provider - Property ✓ Insurance provider - Life ✓ Limited Representative - Other Limited Lines ✓ Hail Adjuster - Hail Adjuster	View & Modify Add New Deactivate Line
FarmOwner's Policy Effective: 04/04/2013 Expiry: 04/03/2019	✓ Insurance Provider - Property ✓ Insurance provider - Life ✓ Limited Representative - Other Limited Lines ✓ Limited Representative - Farm Animals ✓ Hail Adjuster - Hail Adjuster	View & Modify Add New Deactivate Line

South Carolina

Policy Type	Insurance Types	Action Buttons
HomeOwner's Policy	✓ Insurance Provider - Property ✓ Insurance provider - Life ✓ Limited Representative - Other	View & Modify Add New

Use Case: Manage which states the agency can quote in

Pros:

- Agency and representative info
- Visualization of performance score with details
- Line & licenses merged into a single understandable list

Cons:

- License expiry not visible immediately

AGENCY DETAILS - LINES & LICENSES - MODIFY

The screenshot shows a software interface for managing agency details. At the top, there are navigation icons and a user dropdown labeled "Jason O'pal". Below this, the path "Jack Partners LLC > North Carolina > HomeOwner's Policy" is displayed. A sub-header "Select which licenses to modify" is followed by a table listing four licenses:

License Name	Issue Date	Expiry Date
Insurance Provider - Property	02/28/2012	02/27/2019
Insurance Provider - Life	11/23/2016	11/23/2022
Limited Representative - Other Limited Lines	12/14/2017	12/13/2022
Hail Adjuster - Hail Adjuster	01/12/2018	01/11/2025

A button "+ Add New" is located at the bottom left of the list. At the very bottom of the screen, there are buttons for "Modify" (highlighted in grey), "Delete", and "Deactivate Line". The status bar at the bottom shows "FarmOwner's Policy" and "Effective: 04/04/2013".

Use Case: Manage license details, add/edit

Pros:

- License wise issue and expiry date visible

Cons:

- Multi step edit: first select the license(s) then click on modify. Need to shorten
- Multi select not relevant

AGENCY DETAILS - LINES & LICENSES - MODIFY - V2

The screenshot shows a modal window titled "Select license to modify". The window has a header bar with a close button and a user profile "Jason O'pal". The main content area displays a table of licenses:

License Name	Issue Date	Expiry Date
Insurance Provider - Property	02/28/2012	02/27/2019
Insurance Provider - Life	11/23/2016	11/23/2022
Limited Representative - Other Limited Lines	12/14/2017	12/13/2022
Hail Adjuster - Hail Adjuster	01/12/2018	01/11/2025

At the bottom of the modal, there is a link "+ Add New". Below the modal, the main application interface shows a "FarmOwner's Policy" tab with the text "Effective: 04/04/2013" and a "Deactivate Line" button.

Use Case: Manage license details, add/edit

Pros:

- Single select leads to edit screen

Cons:

- Still too many steps

AGENCY DETAILS - AGENTS V1

This wireframe shows the initial design of the Agent Details page. It features a header with a search bar and user dropdown, followed by a breadcrumb navigation. On the left is a vertical sidebar with various menu options. The main content area displays agency and agent details with inline expandable sections. Below this is a table for managing direct agents.

Agency & Agent Details:

- Terry Tomas, Sr Representative, +1 106 800 3488
- Jack Partners LLC, 2125, 14th Ave S, Seattle 98200, Washington, +1 205 777 5468, Member since 08/24/2009
- Loss Ratio: 12
- Written Policy Premium: \$2500000
- Amount Paid Out: \$300000

Table Headers: Lines & Licenses, Agents

Table Data:

Direct Agents	State	Ratio ▾	License Issue	License Expiry
Betty Johnson	Washington	23	02/02/2001	02/01/2019
Corey Adams	Washington	24	04/03/2011	04/02/2029
Betty Johnson	Washington	23	02/02/2001	02/01/2019
Corey Adams	Washington	24	04/03/2011	04/02/2029

This wireframe shows the revised design of the Agent Details page. The layout is similar but includes a more integrated sidebar and a simplified table structure. The agency and agent details remain the same, but the table is designed to look like a standard grid.

Agency & Agent Details:

- Terry Tomas, Sr Representative, +1 106 800 3488
- Jack Partners LLC, 2125, 14th Ave S, Seattle 98200, Washington, +1 205 777 5468, Member since 08/24/2009
- Loss Ratio: 12
- Written Policy Premium: \$2500000
- Amount Paid Out: \$300000

Table Headers: Lines & Licenses, Agents

Table Data:

Direct Agents	State	Ratio ▾	License Issue	License Expiry
Betty Johnson	Washington	23	02/02/2001	02/01/2019
Corey Adams	Washington	24	04/03/2011	04/02/2029

Use Case: Manage agent license details, add/edit

Pros:

- Inline expansion to see details

Cons:

- Inconsistent table design

REDESIGN - LINES & LICENSES V2

Main Menu Option 1
Main Menu Option 2
Contacts
Add New Agency
Add New Agent
Modify License Info
Sub Menu 4
Main Menu Option 4
Main Menu Option 5

Agencies > Jack Partners

Terry Tomas Sr Representative +1 106 800 3488	Jack Partners LLC 2125, 14th Ave S Seattle 98200 Washington +1 205 777 5468 Member since 08/24/2009	12 Loss Ratio \$2500000 Written Policy Premium \$300000 Amount Paid Out

Lines & Licenses		Agents	
Policy Lines	License Type	License Issue	License Expiry
North Carolina			
HomeOwner's Policy Effective: 04/04/2013 Expiry: 04/03/2019	Insurance Provider - Property Insurance provider - Life Limited Representative - Other Limited Lines Hail Adjuster - Hail Adjuster	02/02/2001 02/01/2019 04/03/2011 04/02/2029 02/02/2001 02/01/2019 04/03/2011 04/02/2029	
FarmOwner's Policy Effective: 04/04/2013	Insurance Provider - Property Insurance provider - Life Limited Representative - Other	02/02/2001 02/01/2019 04/03/2011 04/02/2029 02/02/2001 02/01/2019	
Expiry: 04/03/2019	Limited Lines Limited Representative - Farm Animals Hail Adjuster - Hail Adjuster	04/03/2011 04/02/2029 04/03/2011 04/02/2029 04/03/2011 04/02/2029	
South Carolina			
HomeOwner's Policy Effective: 04/04/2013	Insurance Provider - Property Insurance provider - Life	02/02/2001 02/01/2019 04/03/2011 04/02/2029	

Use Case: Manage which states the agency can quote in

Pros:

- Directly view license expiry dates

Cons:

- Too much info perhaps?

AGENCY DETAILS - AGENTS V2

The screenshot shows a user interface for managing agency details. At the top right is a user profile for "Jason O'pal". The main content area displays agency information for "Jack Partners LLC" located at "2125, 14th Ave S, Seattle 98200, Washington" with a phone number "+1 205 777 5468". It also shows a "Loss Ratio" of 12, a "Written Policy Premium" of \$2500000, and an "Amount Paid Out" of \$300000. Below this, there are tabs for "Lines & Licenses" and "Agents", with "Agents" being the active tab. A table lists "Direct Agents" from the state of "Washington", showing four entries:

Agent Name	Ratio	License Issue	License Expiry
Betty Johnson	23	02/02/2001	02/01/2019
Corey Adams	24	04/03/2011	04/02/2029
Betty Johnson	23	02/02/2001	02/01/2019
Corey Adams	24	04/03/2011	04/02/2029

Use Case: Manage agent license details, add/edit

Pros:

- agents segregated into states thus eliminating a row
- Table design more consistent

Cons:

- If a single agent is working in more than 1 state then info will repeat - need more info to decide

UI DESIGN PRINCIPLES EMPLOYED

- Touch optimized targets created for touch enabled laptop devices
- 12 Column layout used for better responsive behavior
- Consistency & Closure
- Material UI
- Icons by Alexandru Stoica
- Color scheme: Dark - for ease of long durations of viewing
- Font: trial: rounded, readable in all sizes



Search for an agent, agency or license



Jason O'pal ▾



MENU

DASHBOARD

CONTACTS

ADD NEW AGENCY

ADD NEW AGENT

MODIFY LICENSE

POLICIES

CLAIMS

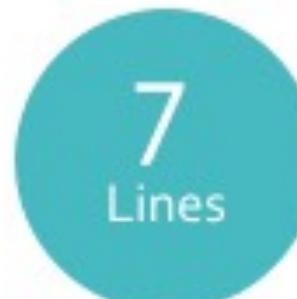
REPORTS

AGENCIES >

Jack Partners LLC

📍 2125 14th Ave S, Seattle, WA 98200

📞 +1 106 800 3488, Terry Tomas



LINES & LICENSES

AGENTS

NORTH CAROLINA

POLICY LINE

LICENSE TYPE

EXPIRY DATE

Insurance Provider - Property

02/01/2019

HomeOwner's Policy

Expiry: 04/03/2019

Insurance Provider - Life

04/02/2029

Limited Representative - Other Limited Lines

02/01/2019

Global search moved to the head of the page

Contact Card like agency info display

Agency non specific items grouped together

State wise segregated tables with column headers inside

Clicking anywhere in this block would take user to the modify overlay screen,

MUNICIPAL
Mutual Insurance Company of WV

Search for an agent, agency or license

Jason O'pal

5

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LINES & LICENSES

AGENTS

NORTH CAROLINA

POLICY LINE

HomeOwner's Policy

Expiry: 04/03/2019

LICENSE TYPE

Insurance Provider - Property

EXPIRY DATE

02/01/2019

Insurance Provider - Life

04/02/2029

Limited Representative - Other Limited Lines

02/01/2019

Hail Adjuster - Hail Adjuster

04/02/2029

Hail Adjuster - Hail Adjuster

02/01/2019

Insurance Provider - Animal Husbandry

02/01/2019

Limited Representative - Property

02/01/2019

Insurance Provider - Tools & Hardware

02/01/2019

SOUTH CAROLINA

POLICY LINE

LICENSE TYPE

EXPIRY DATE

User profile allows for personalization

Agency metrics displayed visually

Showing only expiry date as issue date is not relevant here

REFLECTIONS

- Still many questions wander around my mind, like which other piece of info is needed at this step. What is the aim of the user at this screen? what are his most frequent actions? Or which ones should we target?
- If I have more info on the product / user research I would be able to make better and more confident design decisions.
- But for now...

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