



A Liberty Mutual Company

I worked as the UX lead on my team which supported SalesComp 2.0, an internal sales and compensation tool used by SafeCo Insurance agents.

A large part of my work was focused on improving the usability of the Rejected Transactions feature within SalesComp 2.0.

The Problem

The current view of the Rejected Transactions screen is unorganized, displays unnecessary information, and is out of date.

User Interviews

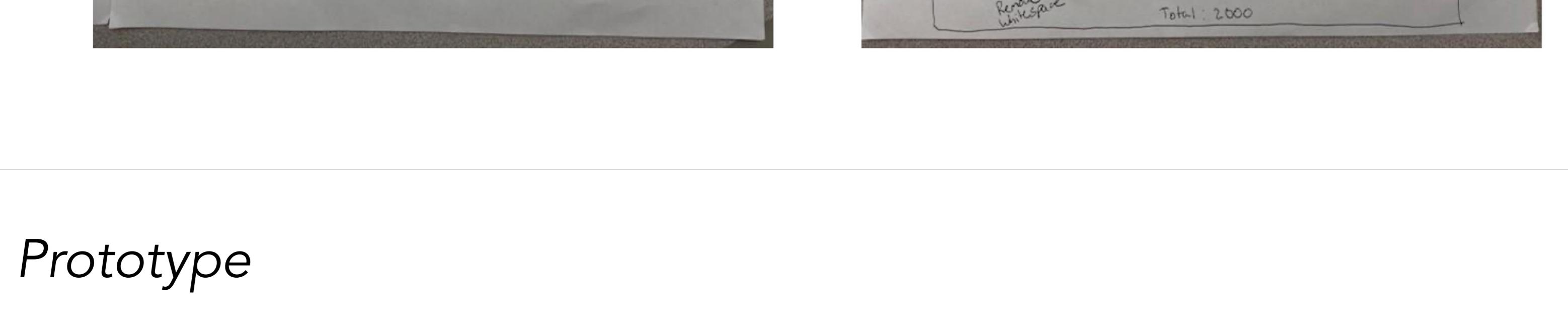
I conducted user interviews with Comp 2.0 stakeholders to identify the biggest issues with the current workflow and painpoints when using its features.

Old Screen

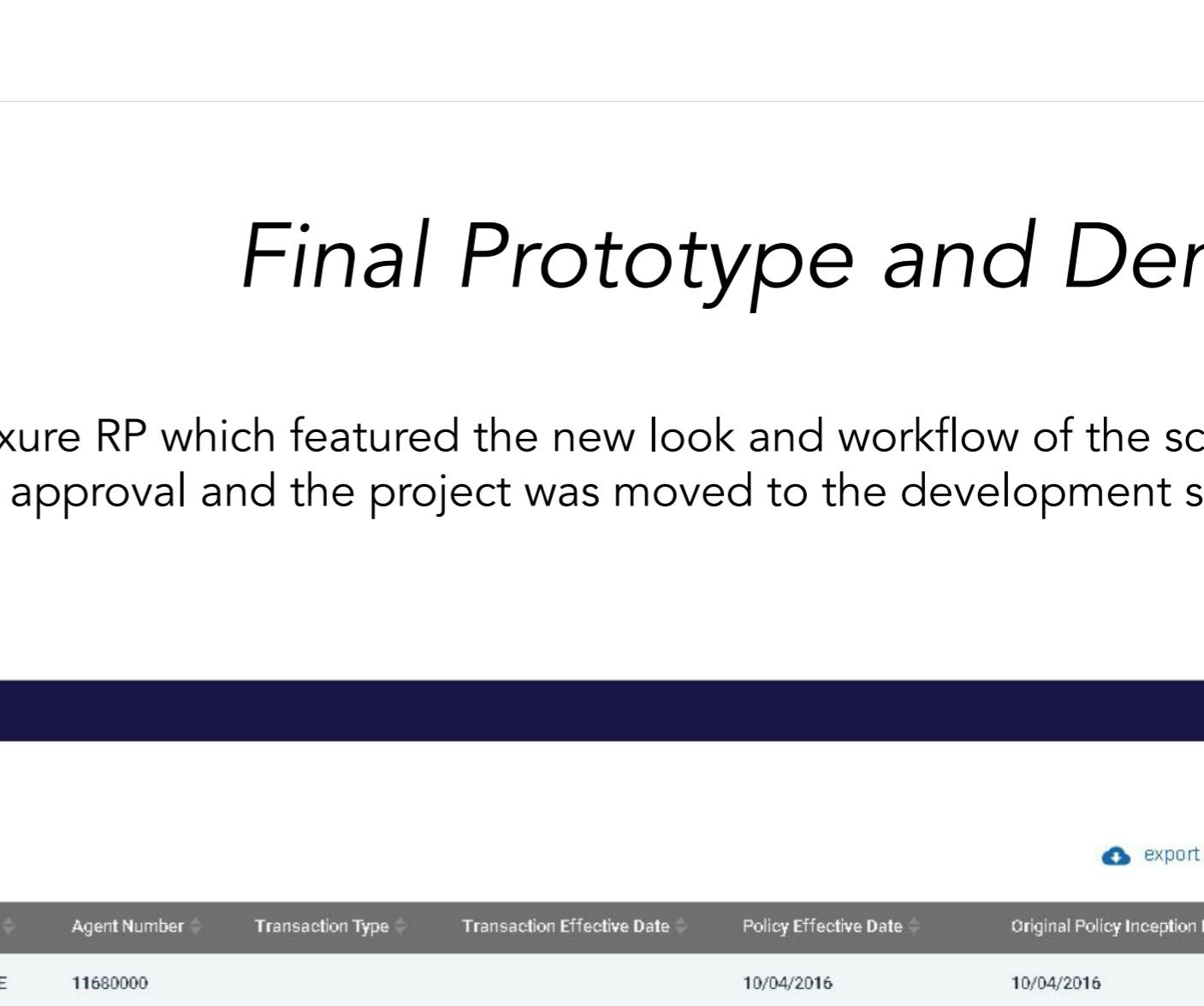
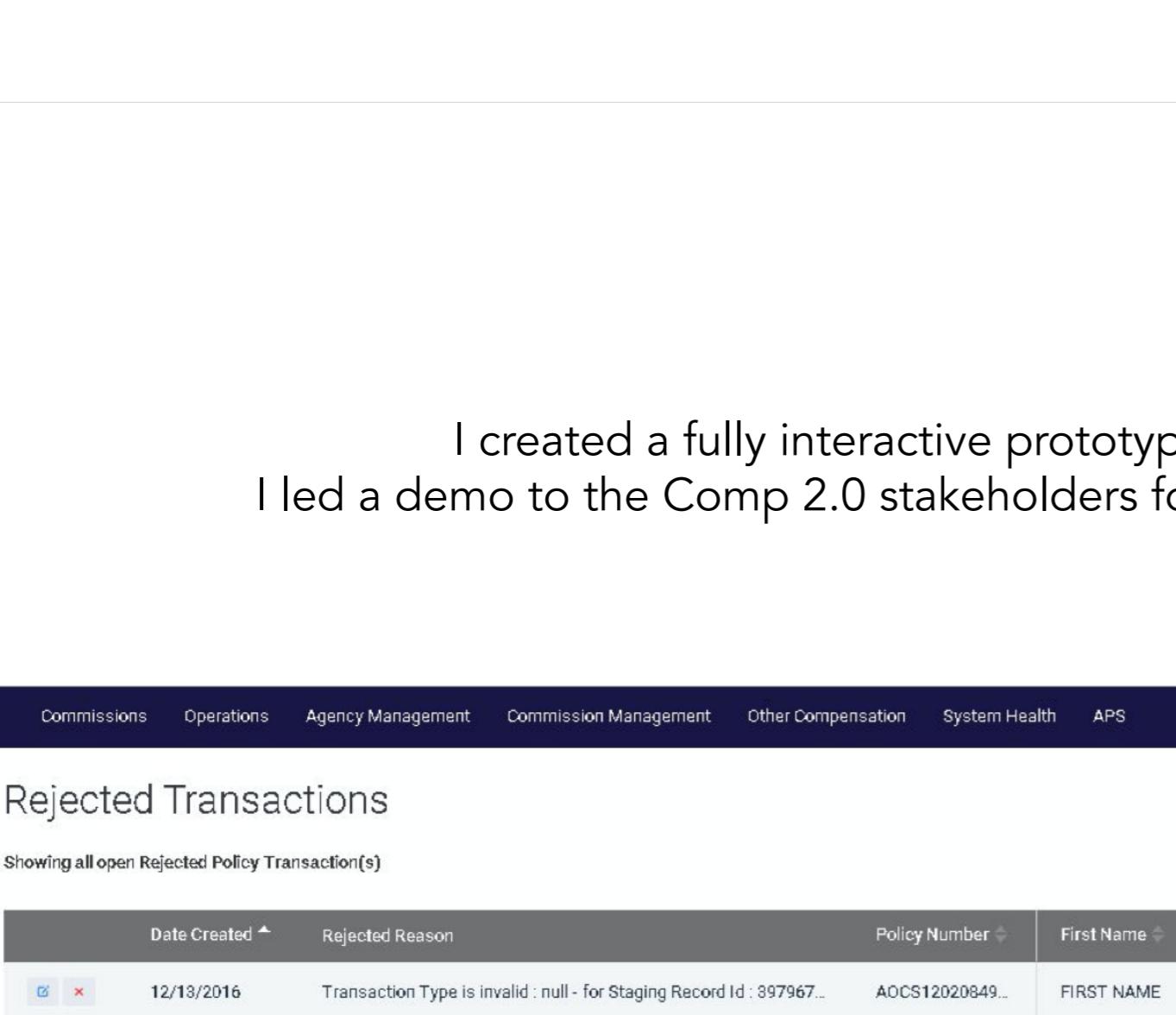
Rejected Transactions											
Date Created	Rejected Reason	Policy Number	Insured First Name	Insured Last Name	Agent Number	Transaction Type	Transaction Effective Date	Policy Effective Date	Original Inception Date	Line of Business	Coverage Type
12/12/2018	Agent number does not exist.	UH6470007	SARA	TYSON	19-174607	KLC-INS	10/26/2019	10/26/2019	02/02/2018		
12/12/2018	Agent number does not exist.	UH6470007	ROBERT	GRAHAM	19-174607	KLC-INS	10/27/2019	11/09/2018	01/01/2017		
12/12/2018	Marital status is invalid.	UH581118	SARA	SMITH-JONES	19-174607	KLC-INS	11/21/2018	11/09/2018	02/02/2018		
12/12/2018	Company code is invalid.	UH6470007	GENE	TYSON	19-174607	END	10/27/2019	11/09/2018	01/01/2017		
12/12/2018	Agent number does not exist.	UH6470007	JESSICA	DILL	19-174607	KLC-INS	10/26/2019	10/26/2019	02/02/2018		
12/12/2018	Agent number does not exist.	UH6470007	ALBERT	BUCKLY	19-174607	END	10/26/2019	11/09/2018	01/01/2017		
12/12/2018	Agent number does not exist.	UH6470007	DAVOTA	GREENE	19-174607	END	10/27/2019	11/09/2018	02/02/2018		
12/12/2018	Agent number does not exist.	UH6470007	ALBERT	JACOBSON	19-174607	KLC-INS	11/21/2018	10/26/2019	01/01/2017		
12/12/2018	Agent number does not exist.	UH6470007	GENE	BROOKES	19-174607	KLC-INS	11/21/2018	10/26/2019	01/01/2017		
12/12/2018	Agent number does not exist.	UH6470007	ROBERT	SMITH	19-174607	KLC-INS	10/27/2019	11/09/2018	02/02/2018		
12/12/2018	Agent number does not exist.	UH6470007	MARGARET	DAVOTA	19-174607	KLC-INS	10/27/2019	11/09/2018	01/01/2017		
12/12/2018	Agent number does not exist.	UH6470007	ALBERT	BROWN	19-174607	KLC-INS	10/27/2019	11/09/2018	02/02/2018		
12/12/2018	Agent number does not exist.	UH6470007	DAVOTA	JAMES	19-174607	END	10/27/2019	11/09/2018	03/01/2018		
12/12/2018	Agent number does not exist.	UH6470007	GENE	BROWN	19-174607	END	10/27/2019	11/09/2018	01/01/2017		
12/12/2018	Agent number does not exist.	UH6470007	ROBERT	GREENE	19-174607	KLC-INS	11/21/2018	10/26/2019	01/01/2017		
12/12/2018	Agent number does not exist.	UH6470007	JAMES	JOHN	19-174607	KLC-INS	11/21/2018	10/26/2019	02/02/2018		
12/12/2018	Agent number does not exist.	UH581118	ROBERT	TYSON	19-174607	END	10/27/2019	11/09/2018	01/01/2017		

Simplifying the Workflow

The current workflow included unnecessary required steps for the users that provided no functional purpose for the screen's use. I simplified the process to streamline the user's experience on the page.

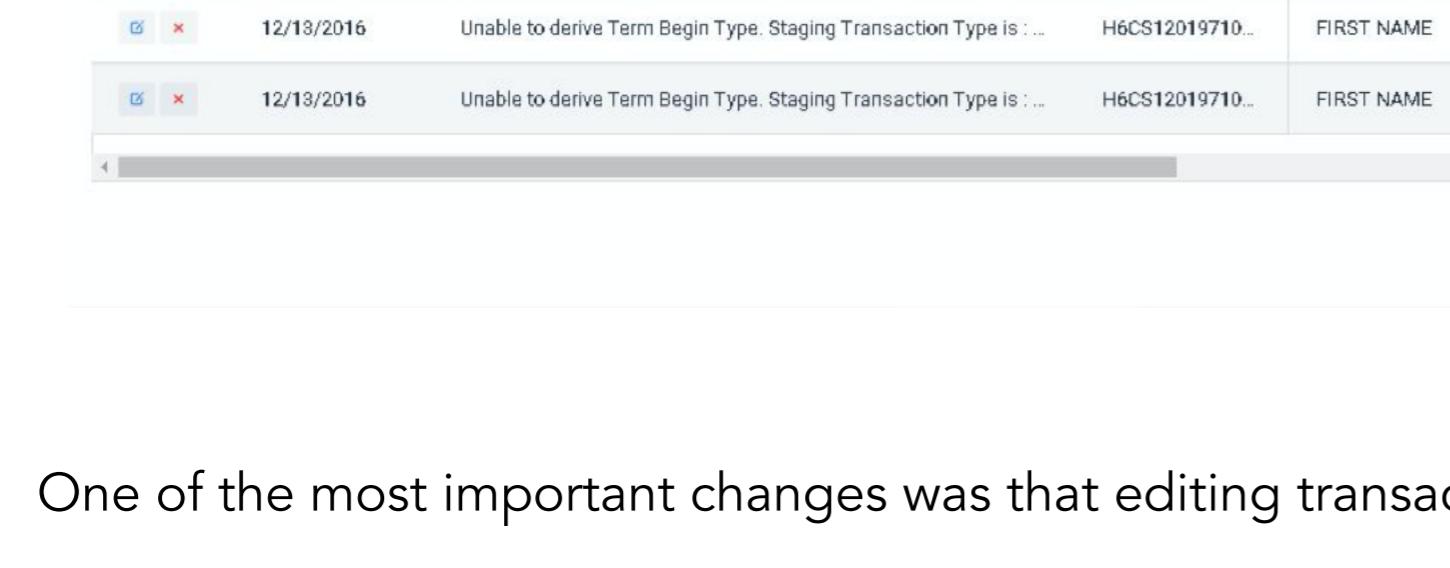


Sketches and Wireframes



Prototype

I took my ideas and created a first draft prototype for the new Rejected Policy Transactions screen. Next, I brought it to my team and got feedback from developers on what would be feasible given the current implementation.



Final Prototype and Demo

I created a fully interactive prototype in Axure RP which featured the new look and workflow of the screen. I led a demo to the Comp 2.0 stakeholders for final approval and the project was moved to the development stage.



One of the most important changes was that editing transactions was changed from inline to a pop up modal with field validation.

