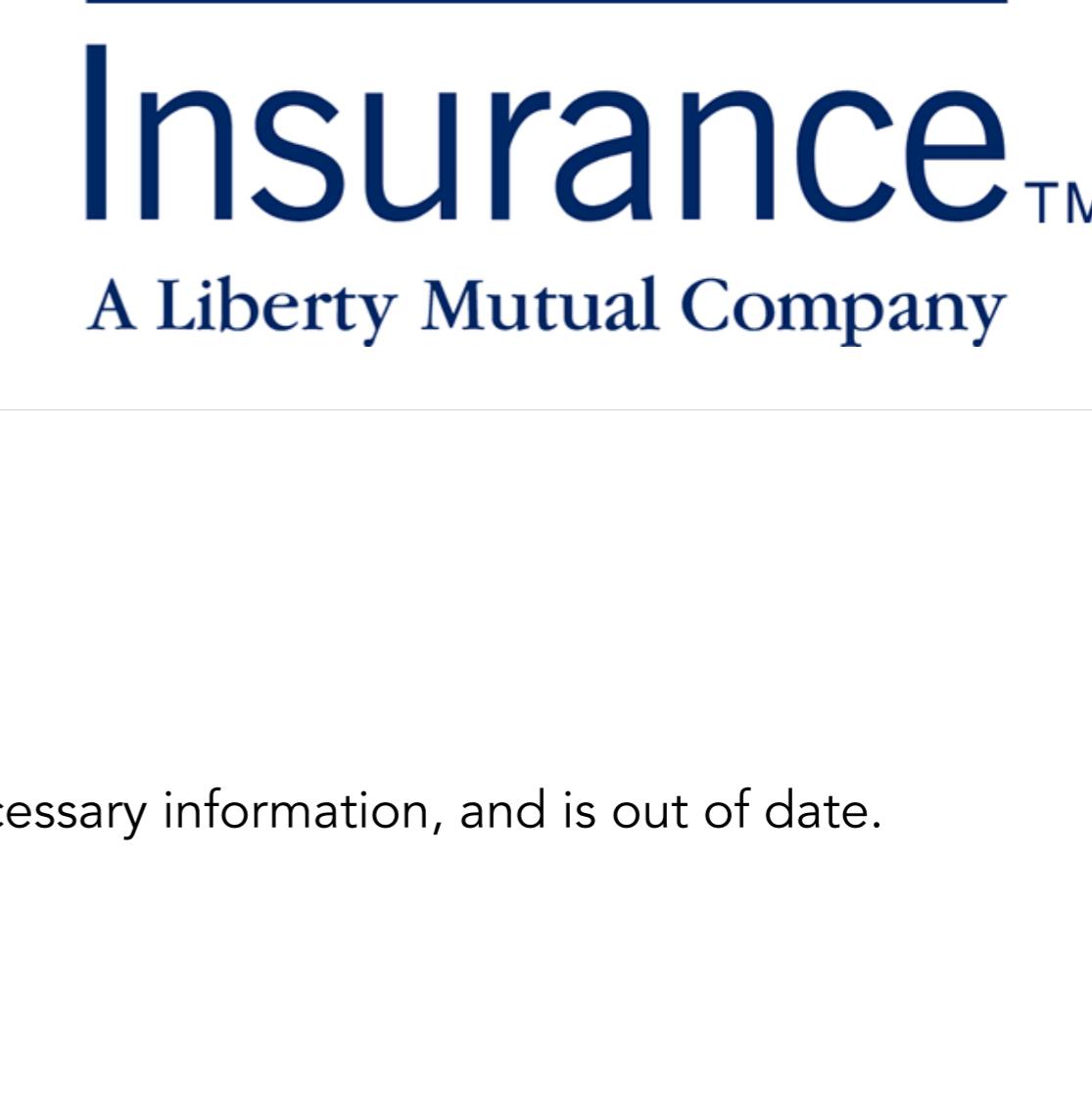


# Liberty Mutual

## SalesComp 2.0

I worked as the UX lead on my team which supported SalesComp 2.0, an internal sales and compensation tool for 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The current view of the Rejected Transactions screen is unorganized, displays unnecessary information, and is out of date.

"...Pertinent info is policy number, name, and missing field --> never touch agent number, policy number, status, and system of origin

Rejected reasons block is too small, if there are more than one you can't see it.  
Should display if there are multiple things to fix.  
Making error reasons clearer: policy inception date is invalid is NOT a correct error message to display when the agent number has not been loaded into comp2  
Successful push of corrected transactions is also in red, which is counterintuitive..."

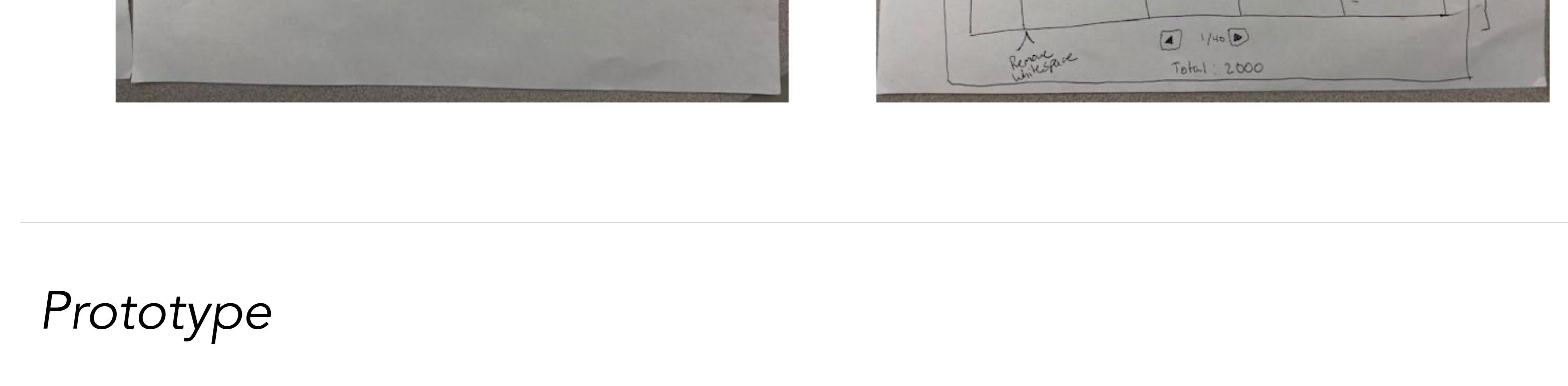
### User Interviews

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

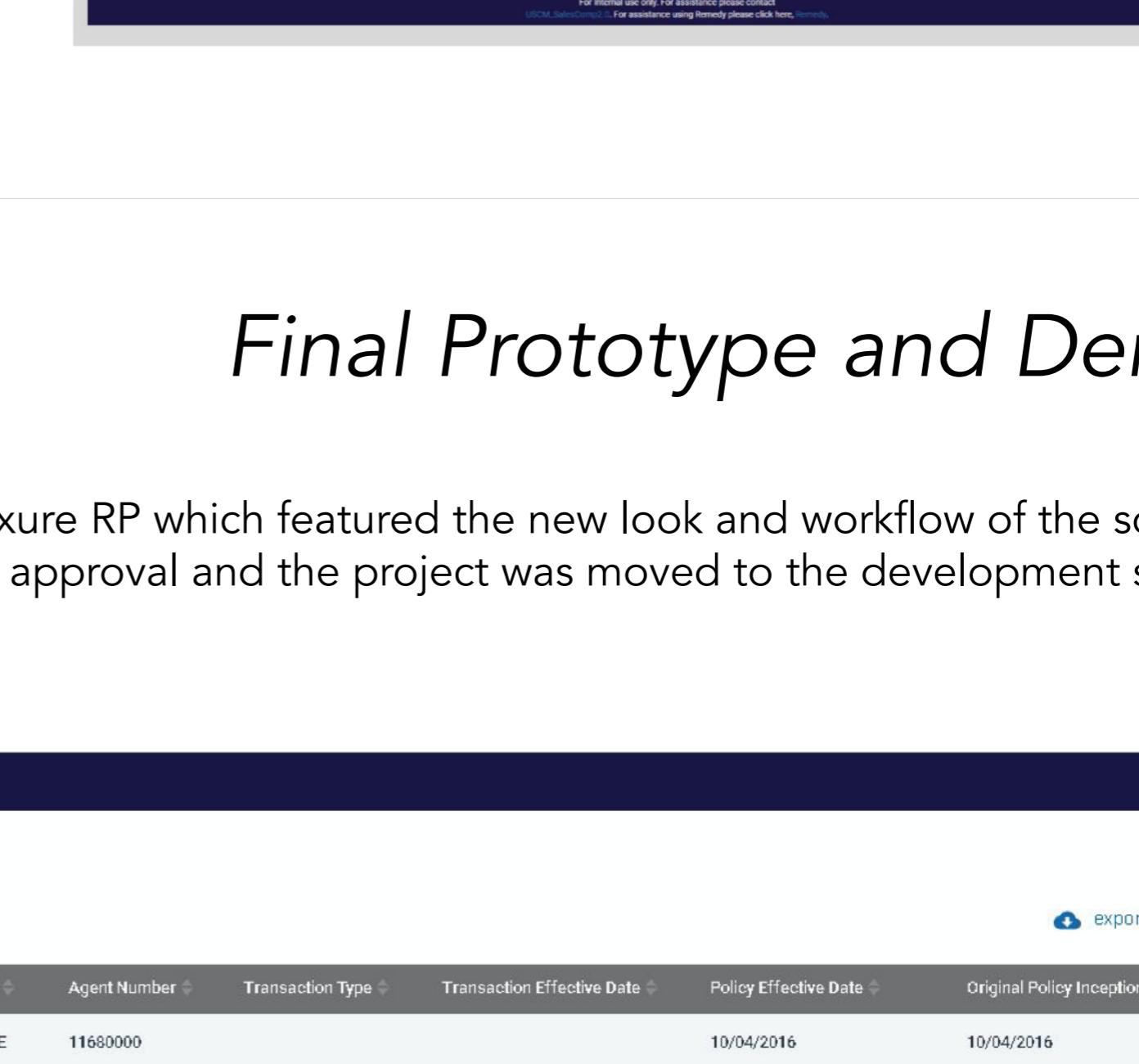
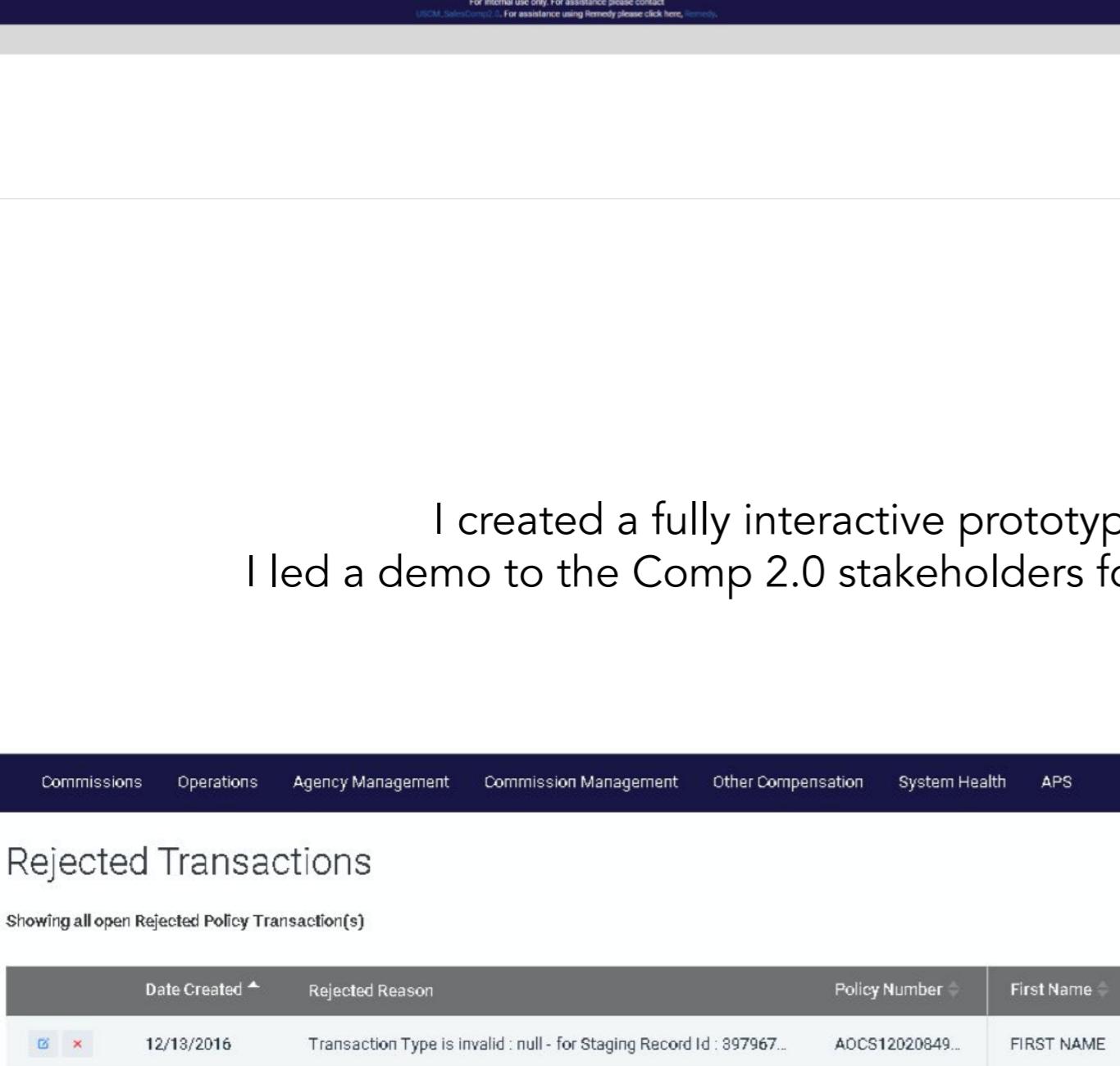
#### Old Screen

### 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.