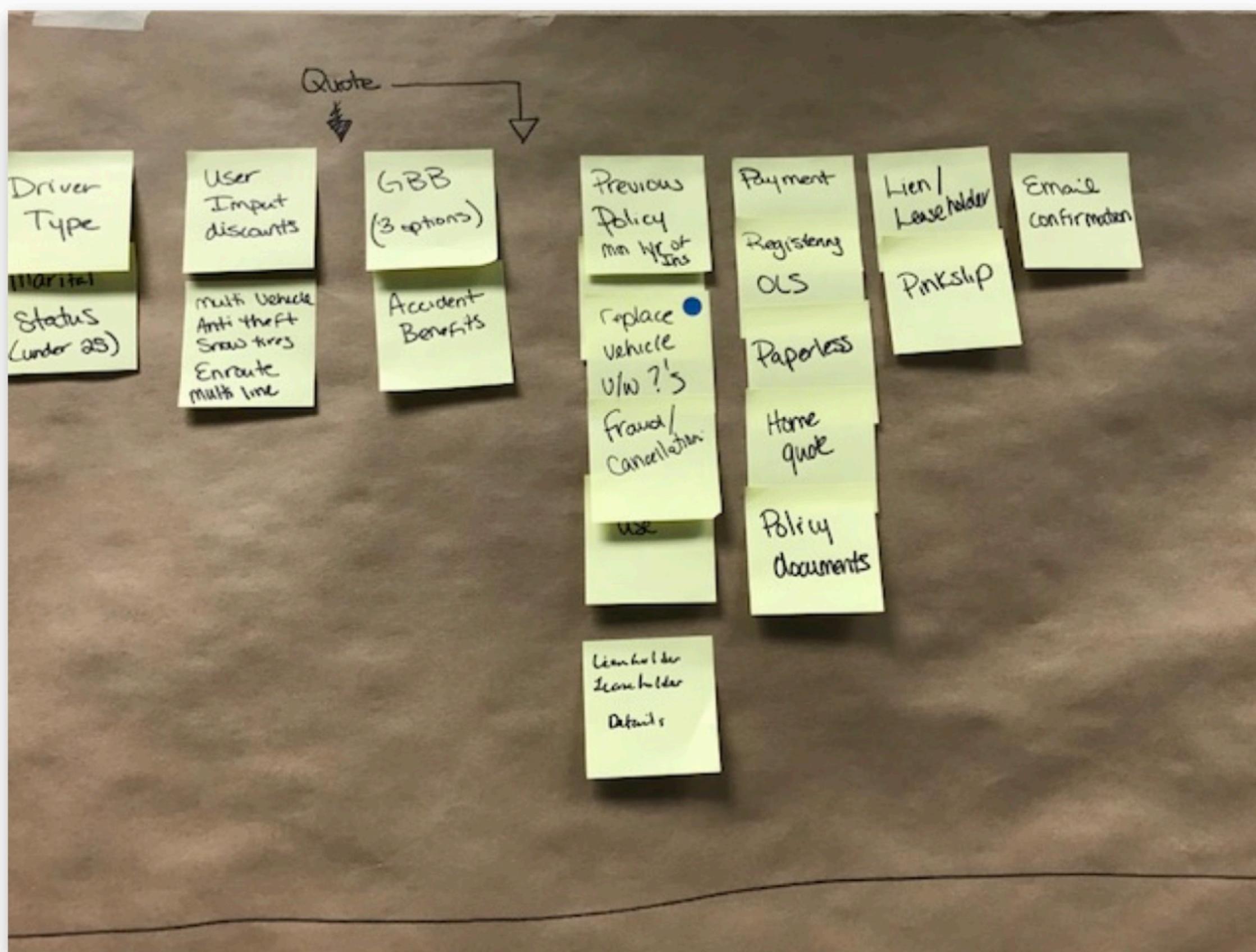


# QUOTE AND BUY

## UX Design: Layout Options

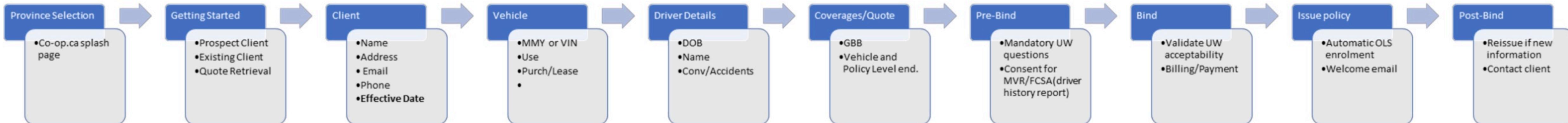
## Focus of the meeting:

- Layout = How the content is arranged on the page, composition
- Does it serve the desired experience ?
- Does it meet the business requirements ?
- Is it consistent with the brand ? etc.
- Not: copy, content, UI, colors, typeface, spacings, flows,...



1 DRIVER	Hide/Show	Quick	Default Value	Input Type	Reccomended Type	Notes
License Type	H	N	Canada Permanent	DD		Could be multiple
Motorcycle Training	H	N	No	Radio		
<b>SUBSTEP 1: WHO ARE YOU?</b>						
First Name	S	N		Text		First driver pre-populated
Last Name	S	N		Text		First driver pre-populated
Date of Birth	S	Y		Date		
Gender	S	Y		DD		
Marital Status	S	Y		DD		
Occupation	S (QC)	N		Text		Multi-fields in modal
Relationship to PolicyHolder	S	N		DD		Not for first driver
<b>SUBSTEP 2: LICENSES &amp; TRAINING</b>						
License Class	S	Y		DD		Could be multiple
License Date	S	Y		Date		Could be multiple
Previous Insurance	S	N	Yes	Radio		
Auto Training	S	N	Yes	Radio		
<b>SUBSTEP 3: HOW'S YOUR DRIVING?</b>						
Minor Convictions	S	Y	0	Text	DD-Ranges?	
Major Convictions	S	Y	0	Text	DD-Ranges?	
Serious/Criminal Code Convictions	S	Y	0	Text	DD-Ranges?	
Suspensions	S	Y	0	Radio		
At Fault	S	Y		Radio		
Loss History	S	N		Radio		
Loss with Claim or no Claim	S	N		Radio		

DATA MAP Getting Started 1 Driver 2 Vehicle 3 Coverage 4 Addtl Info 5 Review All



# 01. Left Rail/ Right Rail

This layout displays the most important information and actions on a card on the left ("F" shaped reading pattern). Narrower cards on the right provide supporting and in-context information. It was implemented for the Online Services and has been successfully tested with users multiple times.

## Inspiration:

The screenshot shows a web page from [cooperators.ca](https://cooperators.ca) titled "Add/Sub a vehicle". The top navigation bar includes links for "Contact us", "Français", and "Sign out". Below the navigation is the "the co-operators" logo. The main content area has a blue header bar with tabs: "Accounts" (selected), "Financial Advisors", "Profile & Preferences", and "Documents". A progress bar at the top of the main form indicates five steps: 1. Details (checkmark), 2. Financials (selected), 3. Coverage, 4. Confirm, and 5. Review. The "Financials" step is currently active, containing questions like "Is the vehicle new?", "Does your Bill of Sale show the vehicle had less than 5000 km upon purchase?", and "Is there a lien on the vehicle?". To the right of the main form is a sidebar titled "Financial Advisor" which lists "Darrel Houghton" from "Insurance Agency Limited" with contact information: PO Box 722, Greenwood, NS, B0P 1N0, phone number 902-765-3334, and email agency\_email\_address. At the bottom of the form are "BACK" and "CONTINUE" buttons.

## Pros:

- Consistent with OLS
- Additional, in-context information on the right rail
- Strong layout, tested with users
- Fast to build ? (OLS components)

## Cons:

- Narrow left rail
- Inconsistent with public website
- Might not be the most suitable layout for this particular, new scenario.

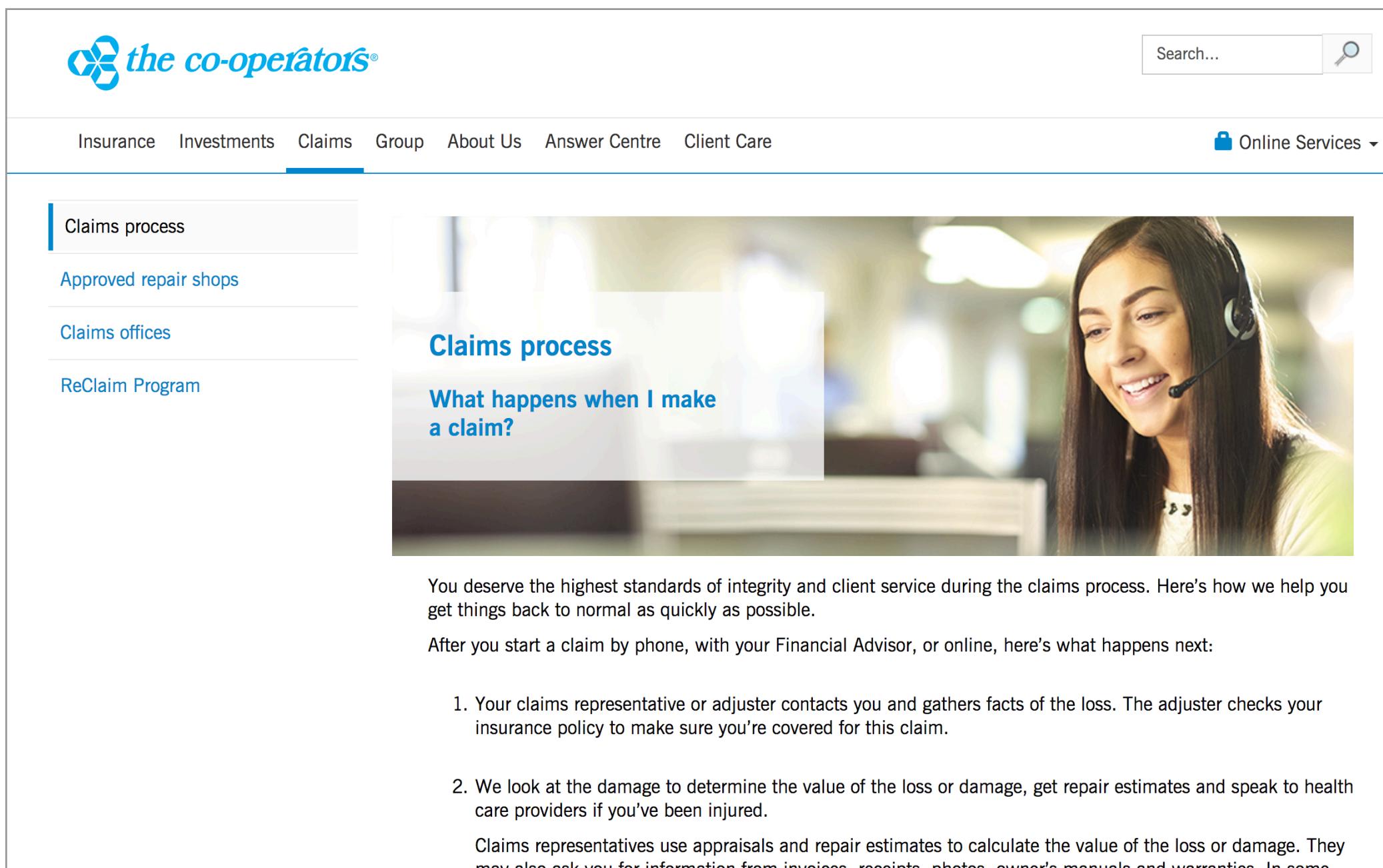
The screenshot shows a web page for 'the co-operatos'. At the top, there are navigation links: Contact Us, Find a Financial Advisor, Get a Quote, and FR. The main header features the logo 'the co-operatos' and a search bar with a magnifying glass icon. Below the header, a horizontal menu includes Insurance, Investments, Claims, Group, About Us, Answer Centre, Client Care, and Online Services.

The main content area is titled 'Get an auto quote' and contains a progress bar with steps 1 through 6, where step 1 is checked. The form is divided into sections: 'Vehicle Details', 'Annual mileage (in km)', 'Vehicle primary use', 'Commute distance (one way, in km)', 'Do you own four snow tires for this vehicle?', 'Is there an anti-theft device in this vehicle?', 'Is the vehicle owned or leased?', 'Purchase price', 'Purchase date' (set to July 11, 2018), and 'Would you like to add another vehicle?'. Buttons for 'CANCEL' and 'CONTINUE' are at the bottom. To the right of the main form, there are two sidebar boxes: one for 'Where can I find my VIN number?' with placeholder text and a 'SHOW ME' link, and another for 'Need help with your quote?' with contact information (1-877-682-5246 and email client\_service\_support@cooperators.ca) and a 'GET A HOME QUOTE' button.

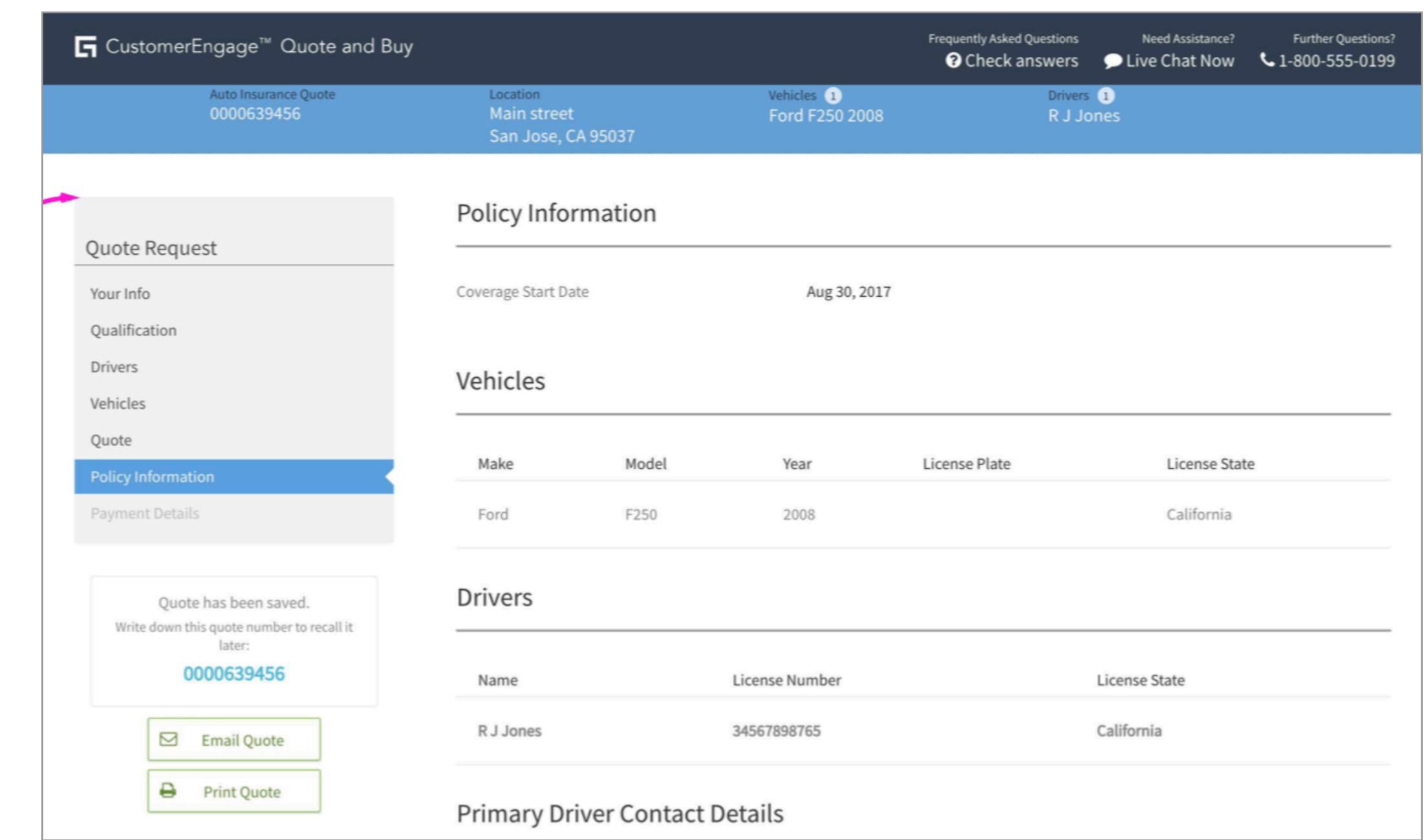
# 02. Public Website

The layout, grid and background color, among others, are different on the public website than on the Online Services. Guidewire ("out of the box") actually follows a layout that's close to the public website one.

## Inspiration:



The screenshot shows the Co-operators public website. The navigation bar includes links for Insurance, Investments, Claims, Group, About Us, Answer Centre, and Client Care. A search bar is at the top right. The main content area features a large image of a woman wearing a headset, smiling. To her left, a sidebar lists 'Claims process', 'Approved repair shops', 'Claims offices', and 'ReClaim Program'. The 'Claims process' section contains a heading 'Claims process' and a sub-section 'What happens when I make a claim?'. Below this is a paragraph about integrity and client service, followed by a list of steps and a note about claims representatives. At the bottom, there is a small note about warranties.



The screenshot shows the CustomerEngage™ Quote and Buy page. The header includes links for Frequently Asked Questions, Need Assistance?, Live Chat Now, and Further Questions?. It also shows an Auto Insurance Quote (0000639456), Location (Main street, San Jose, CA 95037), Vehicles (1 Ford F250 2008), and Drivers (1 R J Jones). The main form is titled 'Quote Request' and includes sections for 'Your Info', 'Qualification', 'Drivers', 'Vehicles', 'Quote', and 'Policy Information'. A blue ribbon highlights the 'Policy Information' tab. A message box says 'Quote has been saved. Write down this quote number to recall it later: 0000639456'. Buttons for 'Email Quote' and 'Print Quote' are at the bottom. The 'Policy Information' section is expanded, showing coverage start date (Aug 30, 2017), vehicles (Ford F250 2008, license plate 34567898765, California), drivers (R J Jones, license number 34567898765, California), and primary driver contact details.

## Pros:

- Consistent with the public website (+Header/Footer)
- Fast to build ? (Guidewire)
- Less “cluttered”, but still space for extra information (+ Progress Menu)

## Cons:

- Reading Patterns ?
- “Too similar” to the public website?
- Few opportunities to introduce OLS patterns

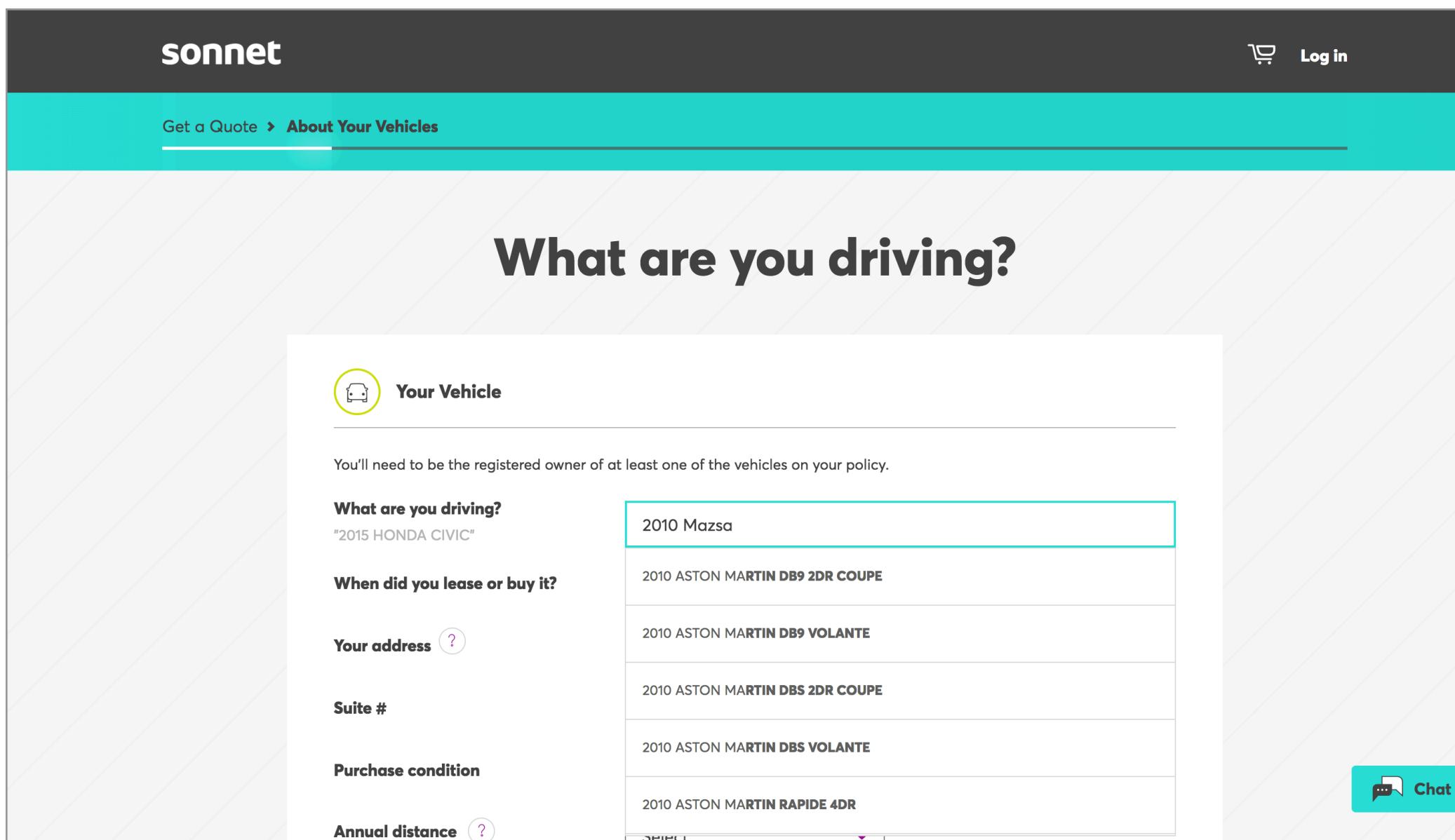
The screenshot shows a web-based insurance application form for 'the co-operators'. At the top, there are navigation links: Contact Us, Find a Financial Advisor, Get a Quote, and a language selector (FR). Below the header is the company logo and a search bar. The main content area has a title 'Let's get started. Tell us about yourself' and a sub-section 'What's your driver's licence number?'. A placeholder value 'X0000-00000-00000' is entered in the input field, with a note below stating 'After you enter your driver's licence number, some of your information will be filled automatically'. The 'CONTINUE' button is located to the right of the input field. The next section, titled 'Driver's Information', contains fields for First Name, Last Name, Date of Birth (with dropdown menus for Month, Day, and Year), Address, Gender (Female or Male), Marital Status (Single, Married, or Common-law), and Email address. Each field has a placeholder text. The 'CONTINUE' button is at the bottom right of this section. The footer features the company logo and social media links for Facebook, Twitter, LinkedIn, YouTube, and Instagram.

# 03. Centered/ Full Page

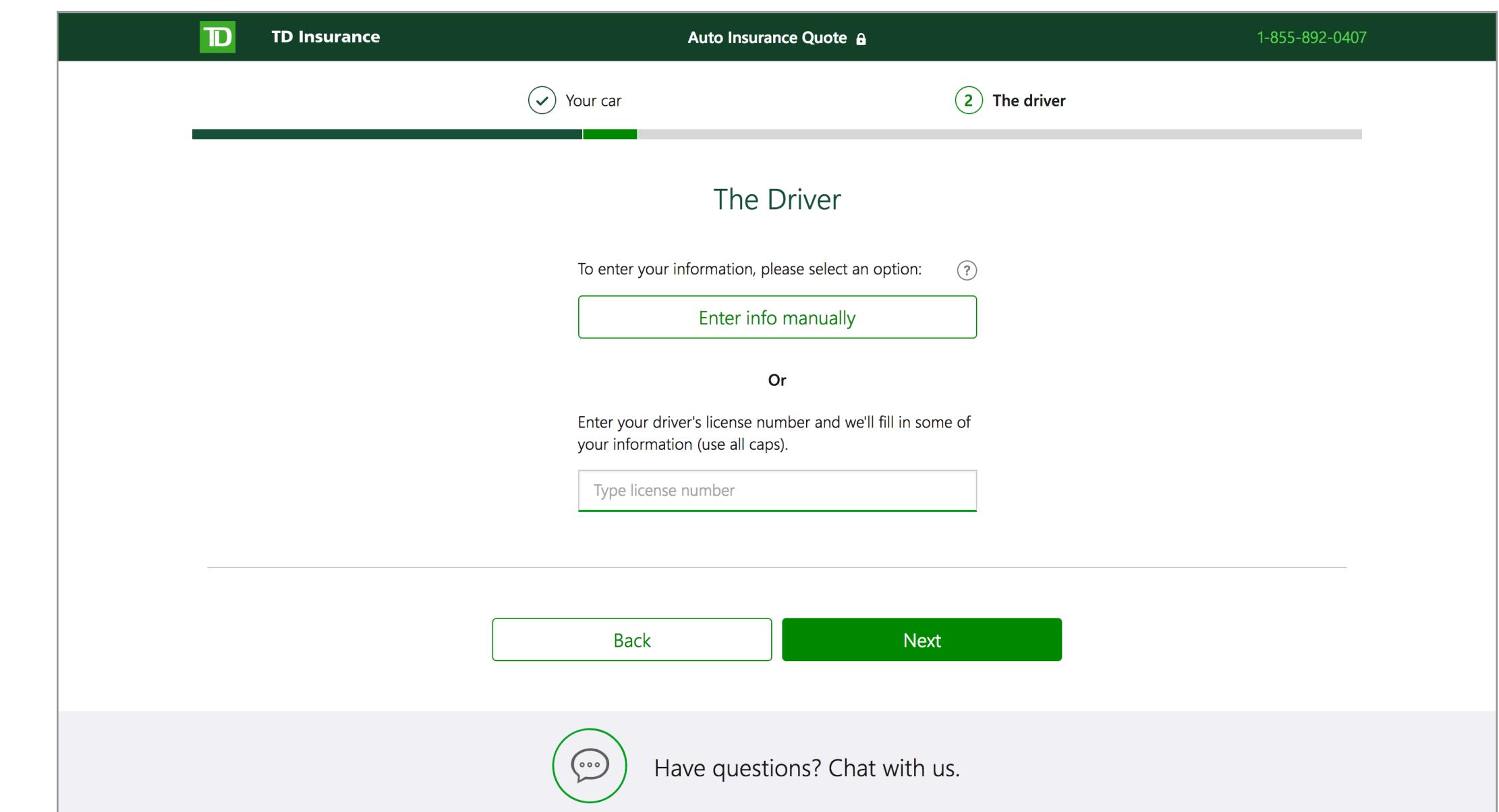
Many players in the online quote field started using a full page, centered layout, sending the user to a minimalist, app-like flow.

Note: Guidewire “Quick Quote” uses this layout too.

## Inspiration:



The Sonnet insurance quote form is a full-page, centered layout. It features a dark header with the brand name "sonnet" and a "Log in" button. Below the header, a teal navigation bar contains links for "Get a Quote" and "About Your Vehicles". The main content area is titled "What are you driving?" and includes a section for "Your Vehicle" with a dropdown menu showing options like "2010 Mazsa" and "2010 ASTON MARTIN DB9 2DR COUPE". Other sections include "When did you lease or buy it?", "Your address", "Suite #", "Purchase condition", and "Annual distance". A "Chat" button is located in the bottom right corner of the form area.



The TD Insurance quote form is a full-page, centered layout. It has a dark header with the "TD" logo and "TD Insurance" text, along with a "Auto Insurance Quote" link and a phone number "1-855-892-0407". The main content area is titled "The Driver" and asks the user to enter their information. It provides two options: "Enter info manually" (selected) and "Type license number". Below these options are "Back" and "Next" buttons. At the bottom, there is a "Have questions? Chat with us." button with a speech bubble icon.

## Pros:

- Focus on the quote process
- Enough space for all elements  
(progress bar, gbb,...)
- More possibilities for exploration
- User expectations + tested by others (?)

## Cons:

- On-brand ?
- Fully customized = more time to build

The screenshot shows a web page from [thecooperaors.com](https://www.thecooperaors.com) for getting an auto quote. At the top, there's a logo for "the co-operators" and a phone number "000-000-0000". Below the header, a progress bar indicates "1 The Driver" is active, followed by "2 The Vehicle", "3 Step Three", "4 Quote Options", and "5 Buy". The main content area has a heading "Get an Auto Quote" and a sub-section "Tell us about yourself.". It asks for a driver's license number, which is currently "X0000-00000-00000". A "CONTINUE" button is next to the input field. A note below says: "After you enter your driver's licence number, some of your information will be filled automatically. You can also enter your information manually." There are sections for "PERSONAL INFORMATION" and "OTHER INFORMATION", each with a collapse arrow icon. At the bottom, there's a "+2 ADD A DRIVER" link and another "CONTINUE" button. A dark footer bar at the very bottom contains the word "Footer".