

2016 User Experience & Design

Our Program Life Cycle

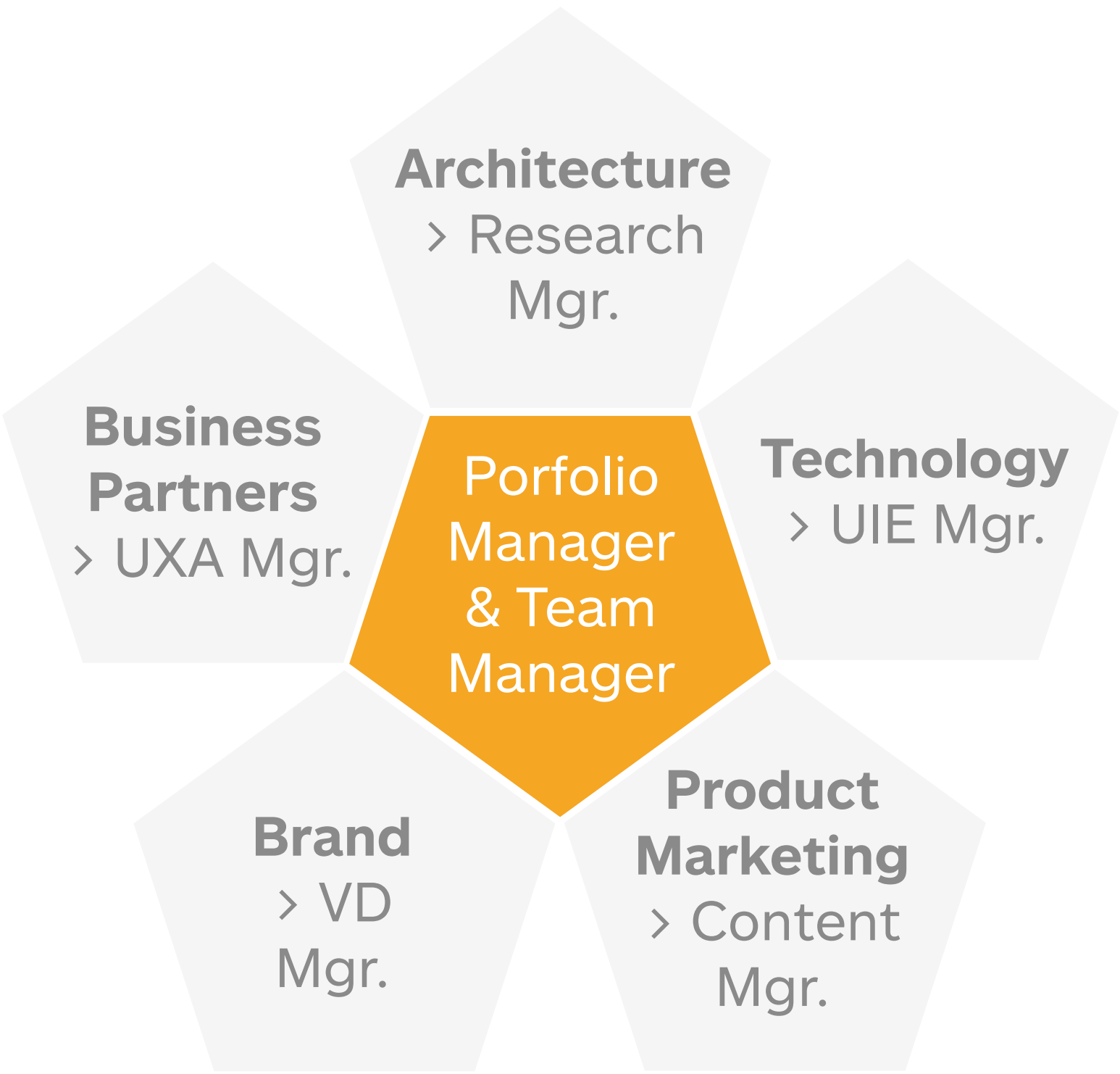
October 5th, 2016 | V1

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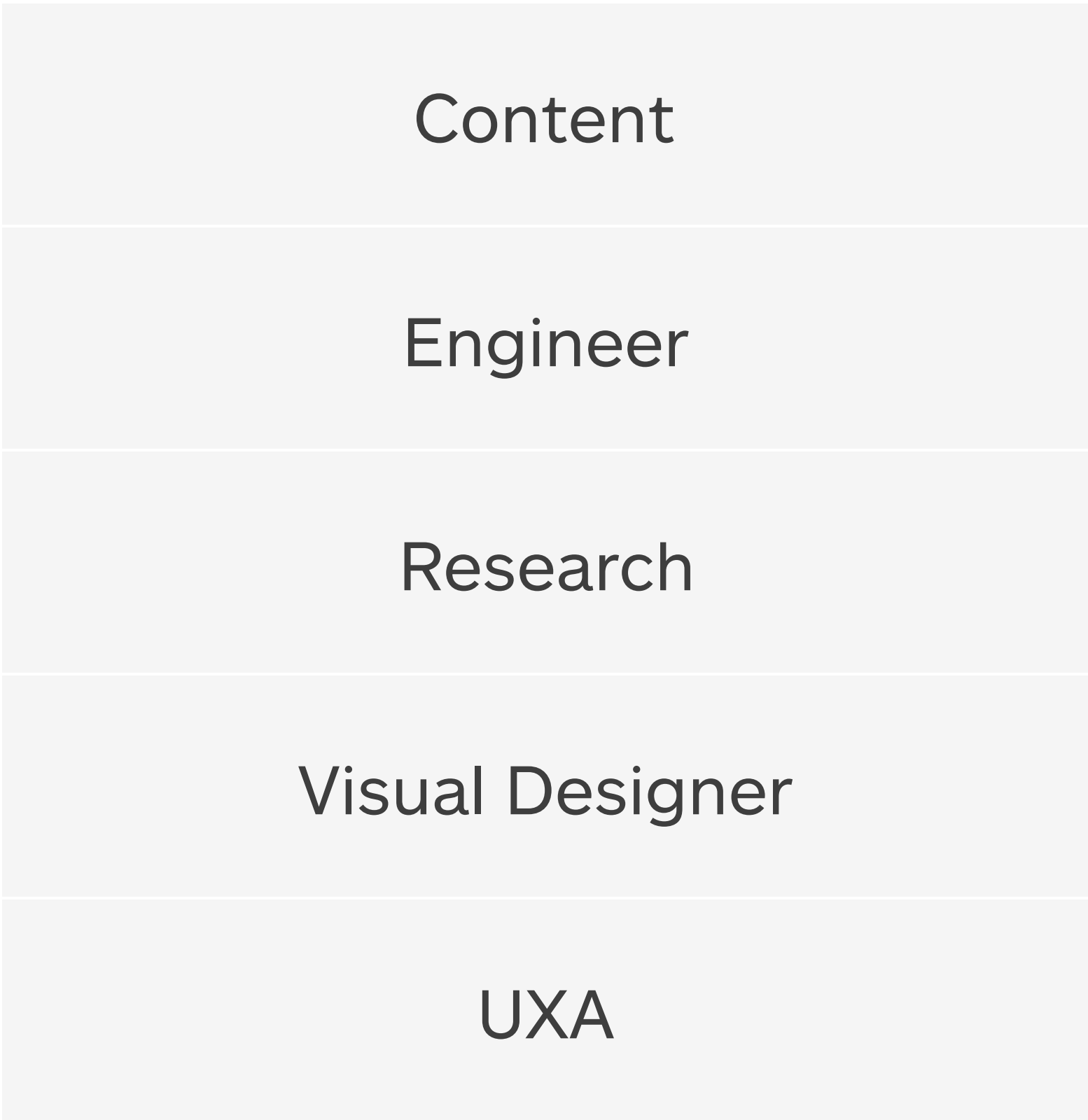
1. Current Roles & Responsibilities
2. Future Make-Up
3. Distribution
4. Project Make up

Working Model | UX & Design Team

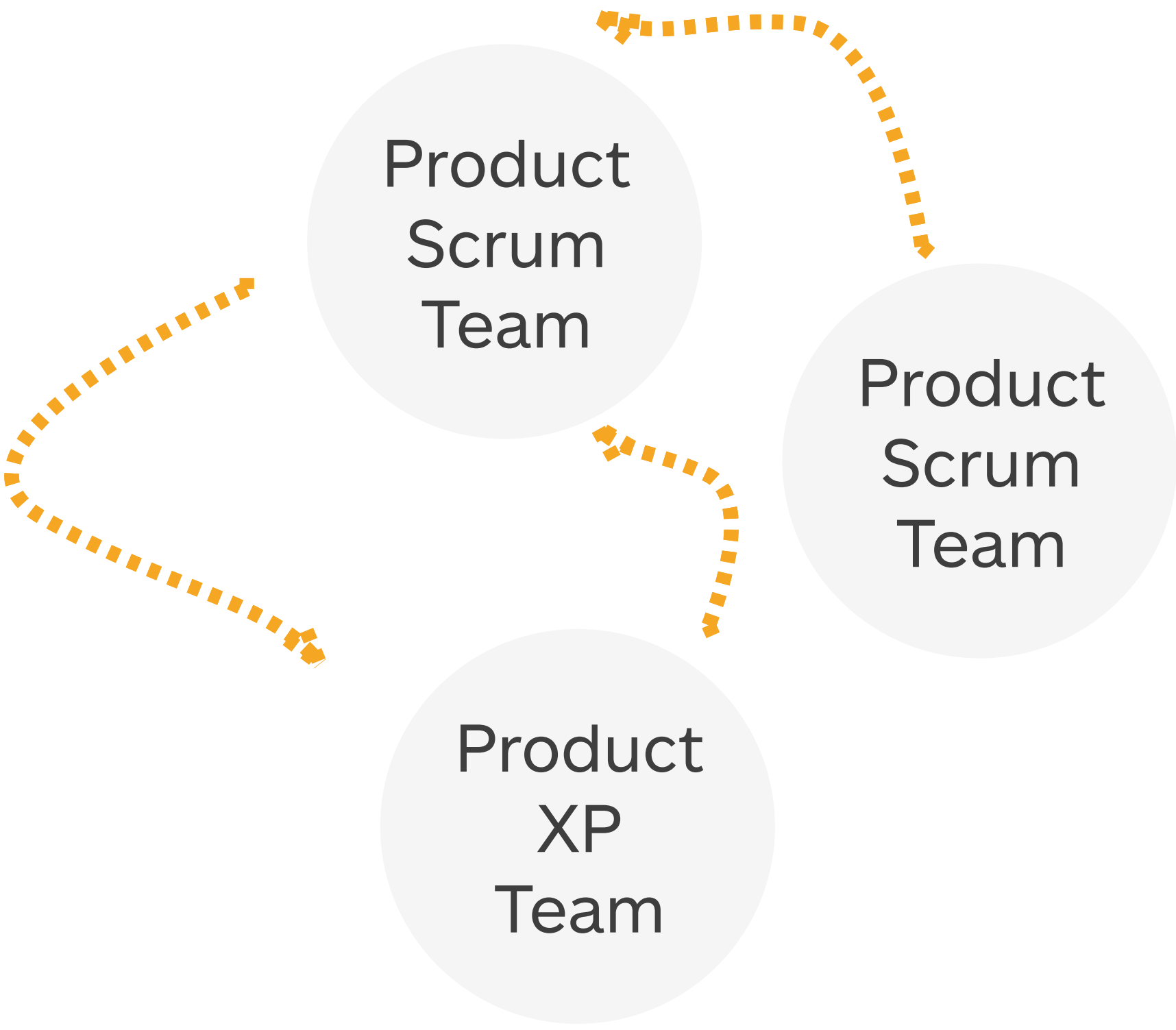
Stage 1 | Strategic Partnership



Stage 2 | Design Makes Strategy Concrete



Stage 3 | Design Supports Delightful Experience



Business Partners & Stakeholders

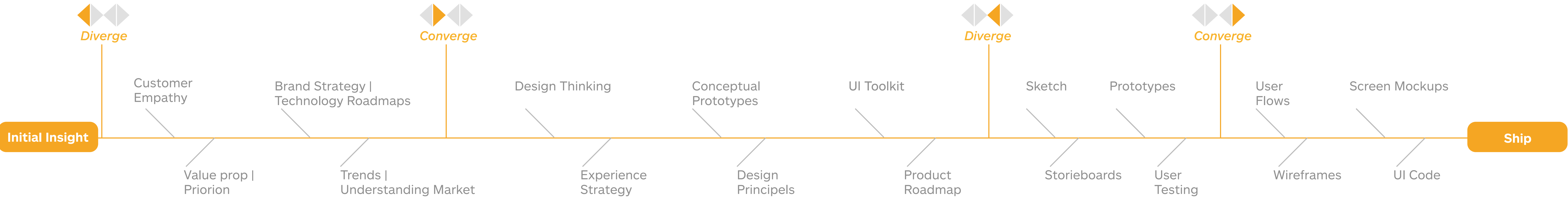
Discipline specific point of contact (POC) works with Portfolio Manager as single point of contact for AOR (i.e. UXA > Business; UIE > technology)

Core Team

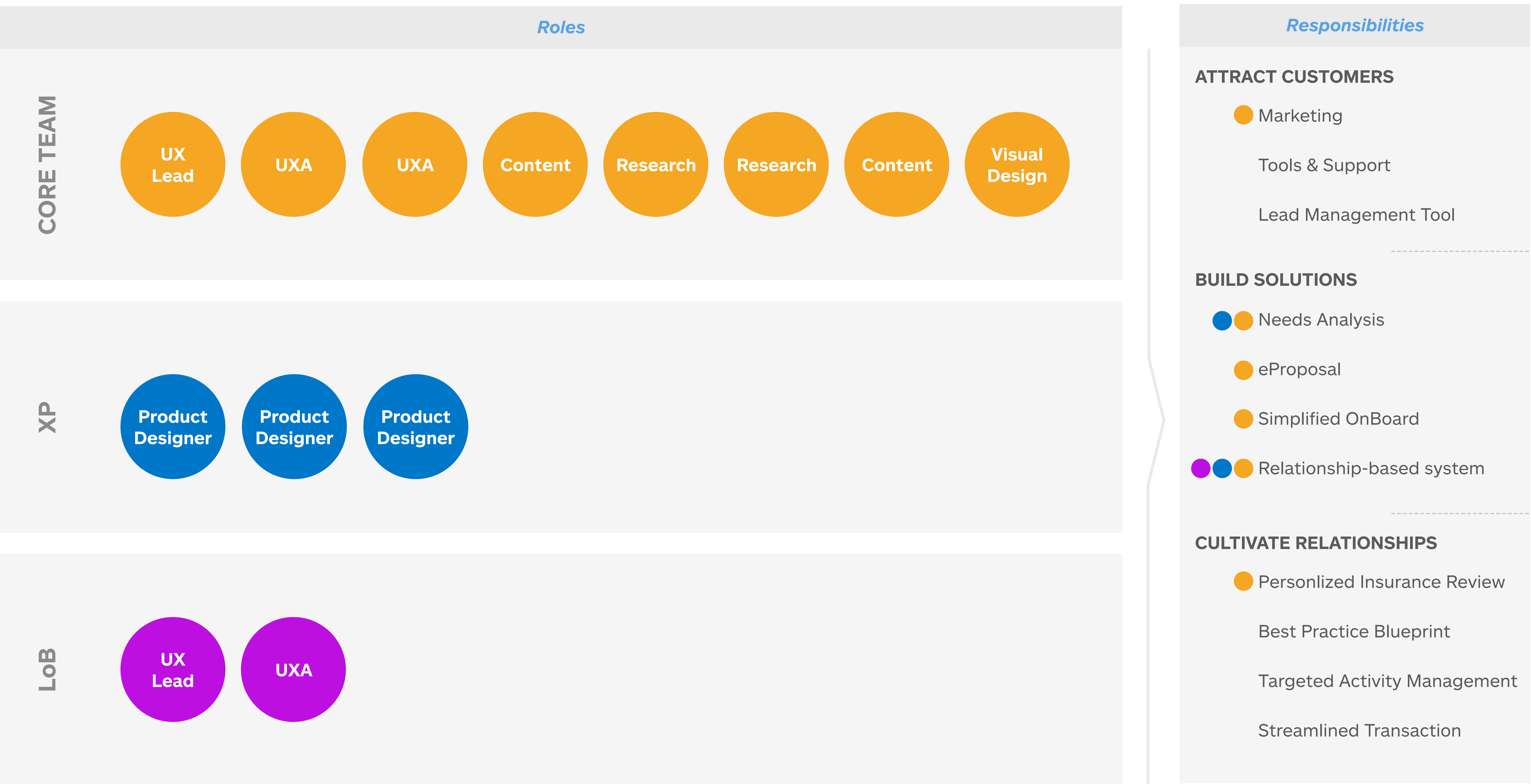
Multidisciplinary team of User Experience & Design members supporting multiple Product Scrum/XP teams. Managers align and drive vision for Product Teams

Product Teams

Scrum teams: Blended team of User Experience & Design members supporting two concurrent tracks.
XP teams: Each have two Product Designers.



Roles & Responsibilities



Team Make-up | UX & Design Team

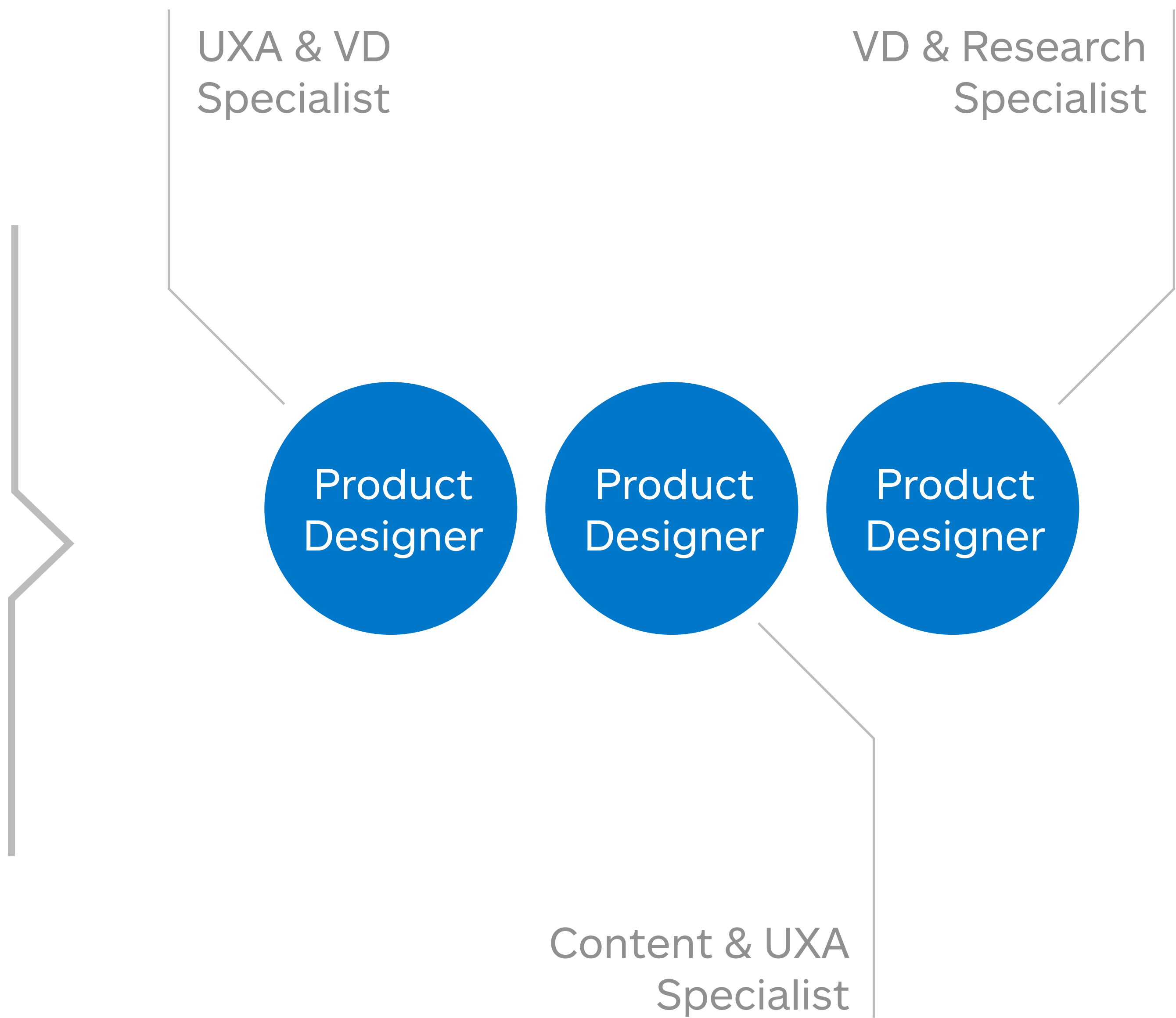
CORE UX TEAM

Multidisciplinary team of User Experience & Design members supporting multiple Product Scrum/XP teams.



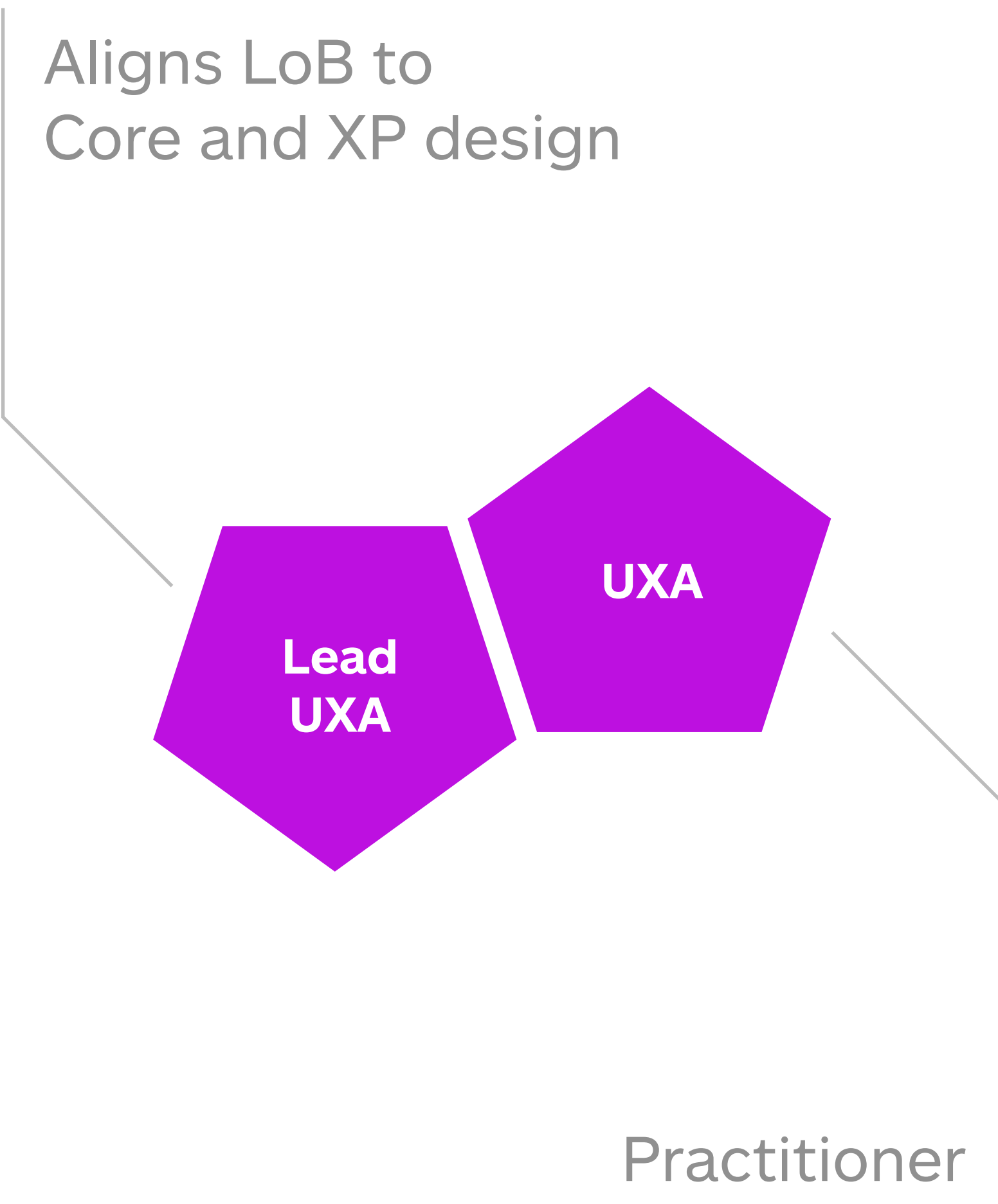
COMPOZED XP DESIGN TEAM

Team of three Product Designers supporting each phase of the User Experience & Design lifecycle.



LoB UX TEAM

An extension of the Core Team made up of a UXA lead and a UXA practitioner for each LoB.





CORE UX TEAM RESPONSIBILITIES ON ABD PROGRAM

Identifying goals and surfacing varying project objectives to align LoB and XP tracks of work. Developing an understanding of user needs and context, and establishing the conceptual models of workflow, behavior, and relationships that lead to informed design.

ABCs of ABD | * Core team current focus and responsibilities

ATTRACT CUSTOMERS

Marketing *

Tools & Support

Lead Management Tool

BUILD SOLUTIONS

Needs Analysis *

eProposal *

Simplified OnBoard *

Relationship-based system *

CULTIVATE RELATIONSHIPS

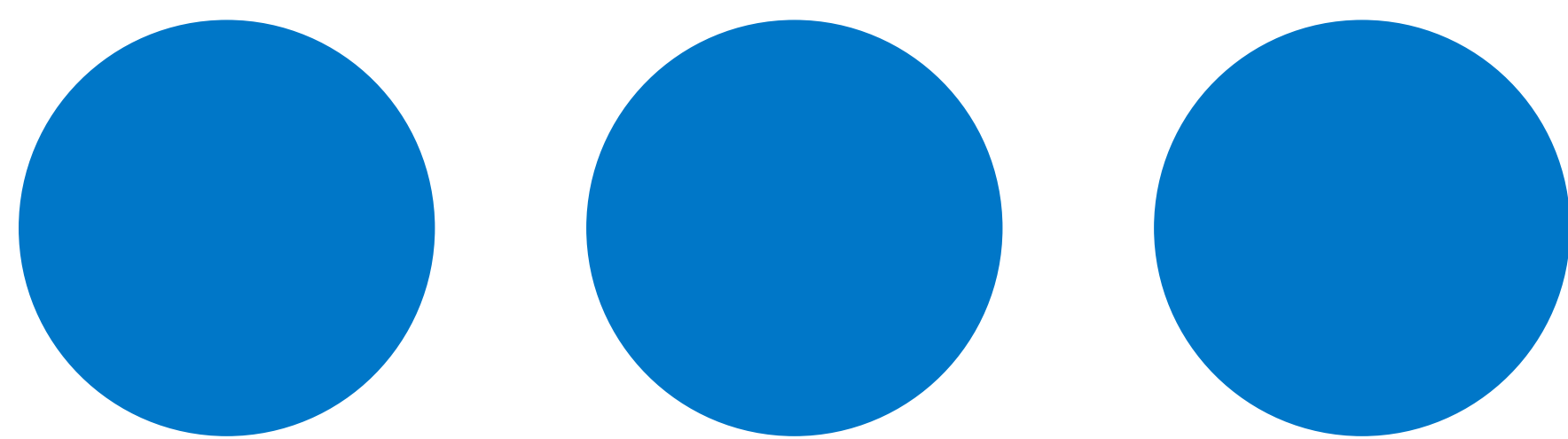
Personalized Insurance Review *

Best Practice Blueprint

Targeted Activity Management

Streamlined Transaction

Customer Self Service



CompoZed XP TEAM RESPONSIBILITIES ON ABD PROGRAM

Understand user needs and design iterative wireframes / prototypes for user feedback that will validate the teams hypothesis.

ABCs of ABD | * XP team current focus and responsibilities

ATTRACT CUSTOMERS

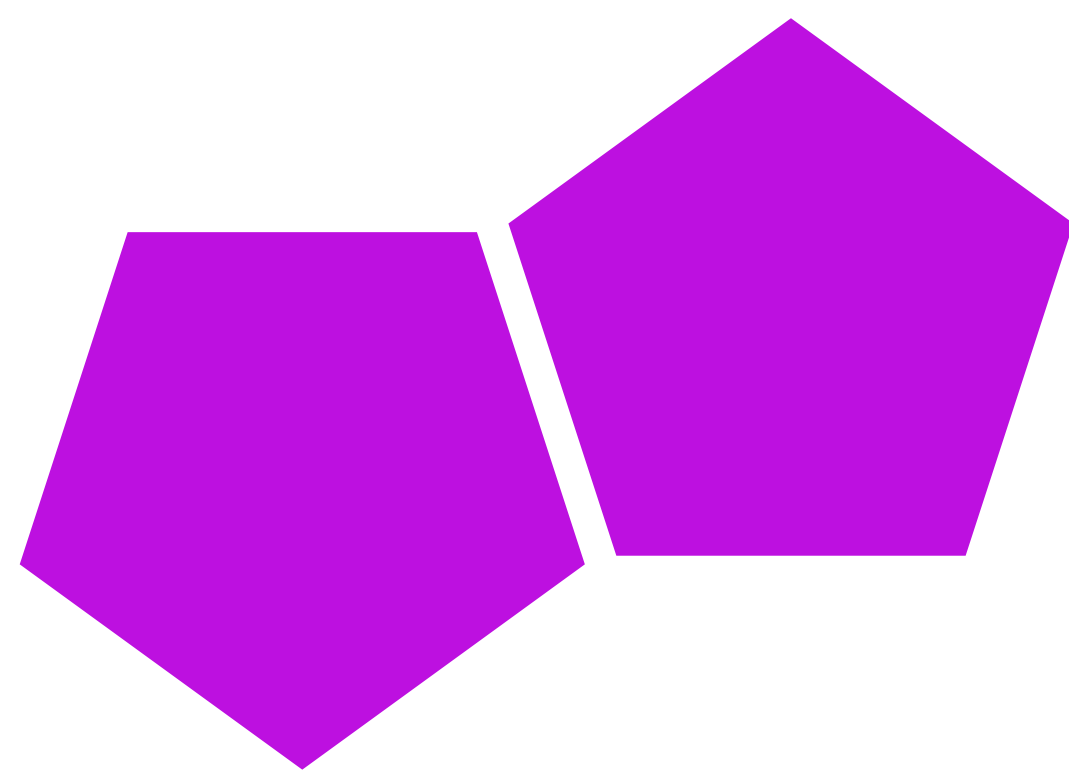
- Marketing *
- Tools & Support
- Lead Management Tool

BUILD SOLUTIONS

- Needs Analysis *
- eProposal *
- Simplified OnBoard *
- Relationship-based system *

CULTIVATE RELATIONSHIPS

- Personlized Insurance Review *
- Best Practice Blueprint
- Targeted Activity Management
- Streamlined Transaction
- Customer Self Service



LoB TEAM RESPONSIBILITIES ON ABD PROGRAM

Align to XP and Core team strategy and vision. Detailed design of LoB requirements working closely with business SME knowledge. Design components that fit into the larger ecosystem of the Relationship Platform

ABCs of ABD | *** XP team current focus and responsibilities**

ATTRACT CUSTOMERS

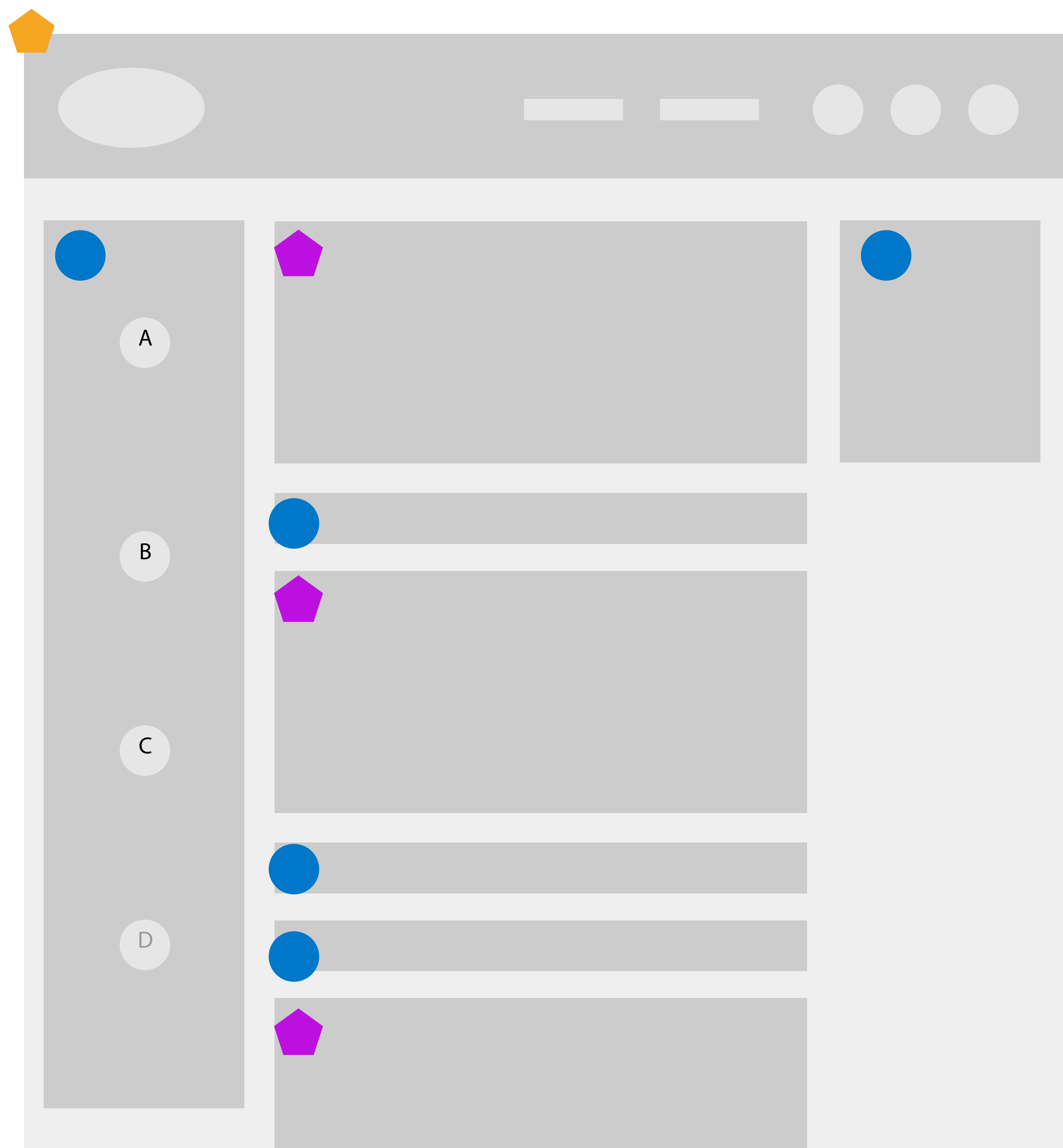
- Marketing *
- Tools & Support
- Lead Management Tool

BUILD SOLUTIONS

- Needs Analysis *
- eProposal *
- Simplified OnBoard *
- Relationship-based system ***

CULTIVATE RELATIONSHIPS

- Personlized Insurance Review *
- Best Practice Blueprint
- Targeted Activity Management
- Streamlined Transaction
- Customer Self Service



Core Team

Understands the entire ABD Trusted Advisor strategy to ensure multiple projects are aligned to the future sucess of our agents new ecosystem.

- Oversight of;
- Relationship Platform
 - Needs Analysis
 - LoB's
 - Life Sales Central
 - iVantage

CompoZed Designers

Understands the vision of Relationship-Based System. Strategy and validated feedback on intertwining Multiple LoBs into Needs Analysis to ensure a cohesive user experience of a new Relationship Platform

LoB UXAs

Detailed design of quoting, coverages and LoB specific business requirements.