

UI/UX Design + CRM

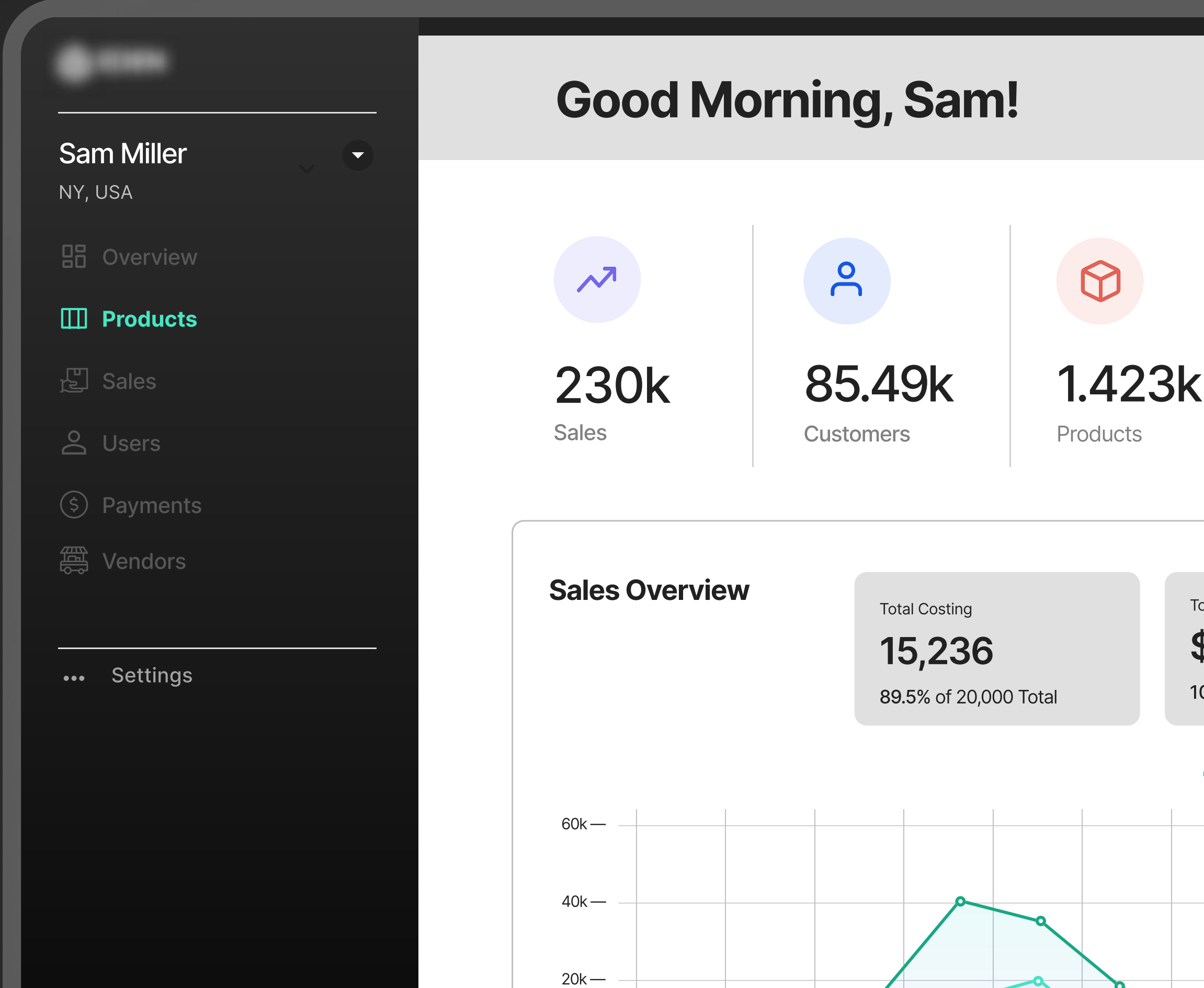
We collaborated with an insurance firm that offers multiple insurance products to consumers & business across various verticals. We assisted them in streamlining their sales process within their CRM and streamline the aesthetics with intuitive analytics & collaboration for all their products and services.

Scope of Work

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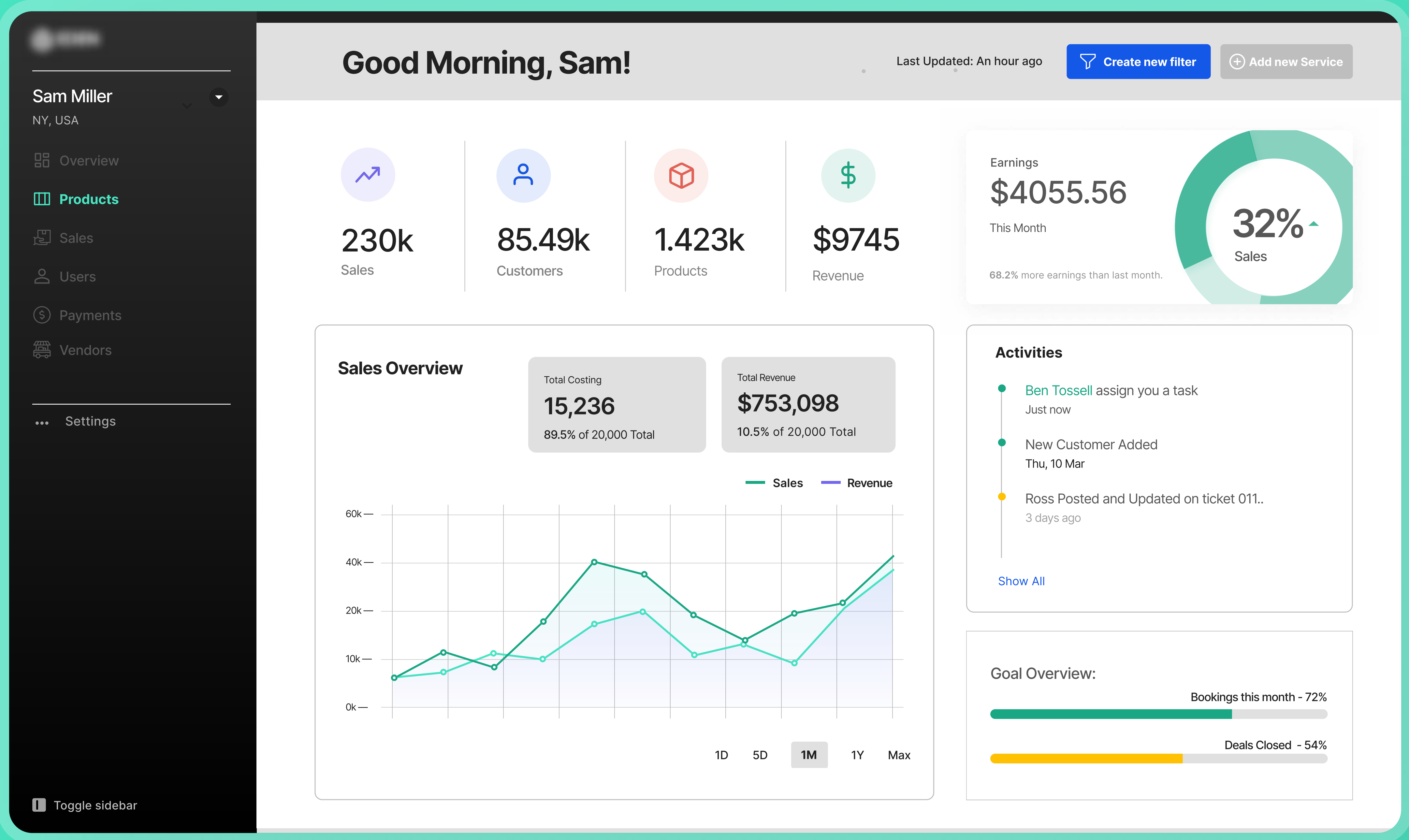
UX/UI
- +

Content



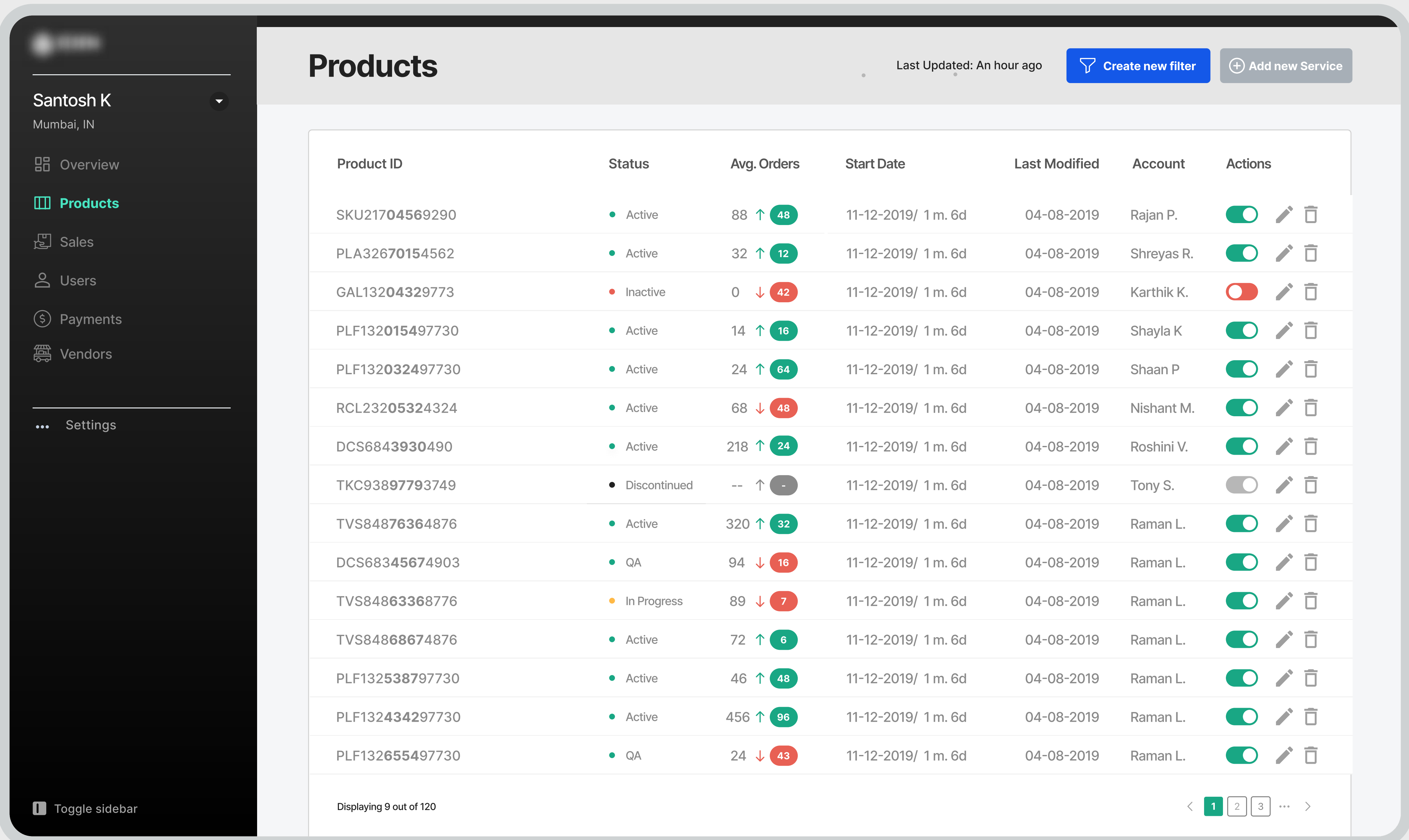
A Unified Source of Truth

A CRM has extensive capabilities we were assigned to take it to the next level so we did what we do best, conducted extensive user-testing and UX research. We uncovered that there is discrepancies and blockages across the Finance, Sales and Product teams were. We figured most of the problems could be solved and improve efficiency if only there was a source of truth - So We built one.



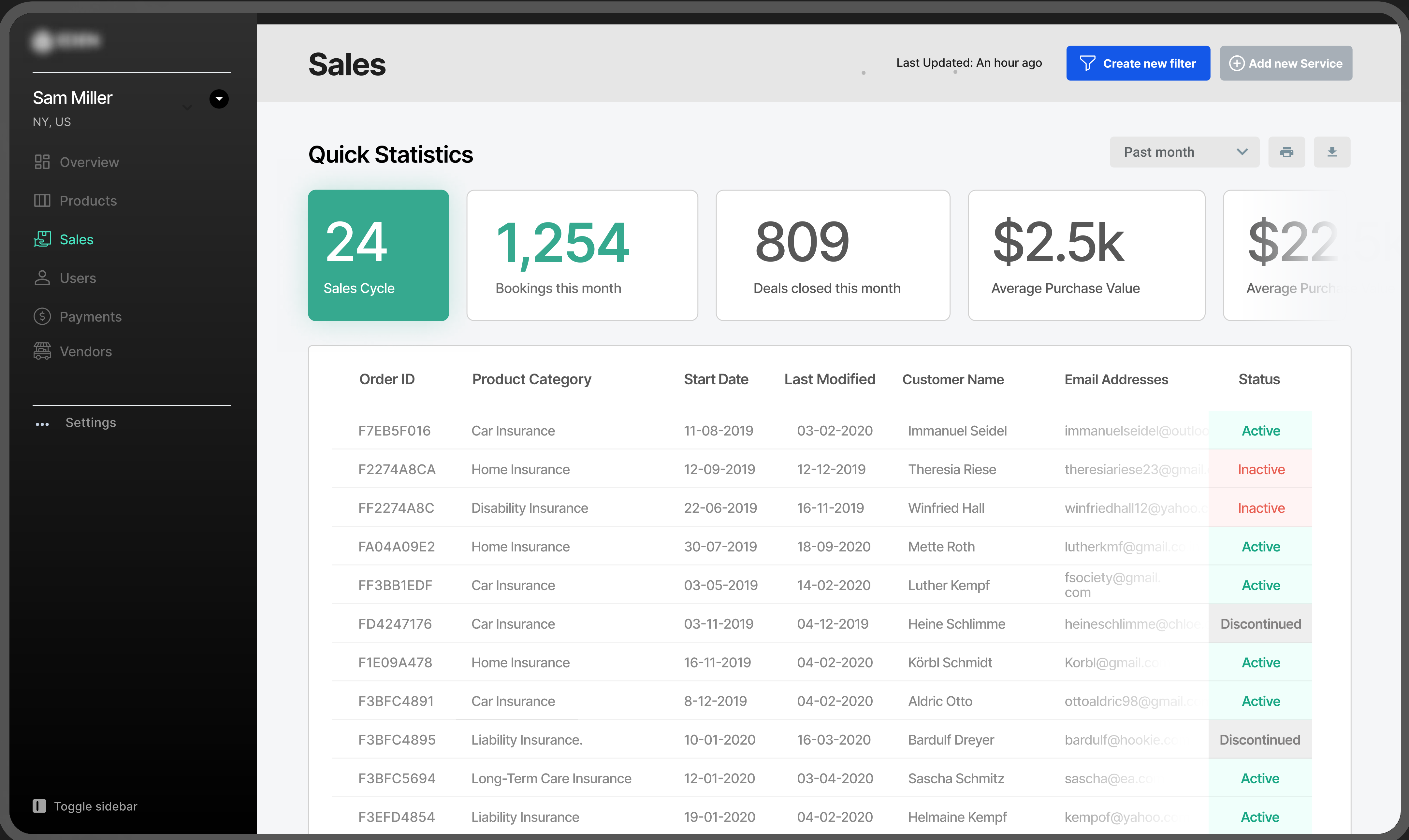
Product Catalog + Order Management

The key objective was to optimize the journey from innovation to optimize innovation. Instead of separate tools for each, we built one - that works for all - from reps to management to stakeholders. The Products tab act as a Catalog, a Data Mine and also a Sales CRM. With real-time data updates from CRMs, a mix of Enterprise tools, and Custom APIs.



Sales + Earnings & Revenue

The Sales Tab acts as a Financial Dashboard for increasing financial efficacy. Also, as a Sales CRM for Reps for increasing Sales efficiency. A Data Mine for the Product team to optimize products and innovate more feasible solutions on the go.



Looking for a Custom Product?

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