



# Visualization

Design Document

firelight

## **VISUALIZATION**

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# Design Approach – Visualization

## Project Overview

The new visualization feature optimizes the use of the viewable area for the graphical presentation of policy values in individual product and product comparison scenarios to enhance communication in the sales process and facilitate client decision-making.

## Impact

- Enhance sales experience as agents can move seamlessly within FL, into the embedded product library/ Proposal builder on the FL homepage.

## Benefits

- Enhance agent-client communication by leveraging graphical representation to present policy values, ensuring a clearer understanding of product offerings and their associated benefits.
  - Visualize a graphical illustrations of Products in Charts
  - Compare multiple Scenario
  - Compare multiple products
  - Create a Proposal

## Product Library

The product library serves as a comprehensive display of our complete range of available offerings, encompassing details about products, lines of business, product types, available carriers, features, and demographic information such as age, gender, and state availability.

Users can employ this information as a filter, enabling them to refine their search and focus on specific desired products. The state availability option serves as a filter to narrow down products based on preferred jurisdictions.

Search by product or carrier...

87 Available Products

## Product Details

## Lines of Business

Annuity ▼

## Product Types

Any ▼

## Product Sub-Type

Any ▼

## Carriers

Athene, Jackson National... ▼

## Features

5 Selected ▼

## Demographics

## Age

45

## Gender

Male ▼

## State Availability

Any ▼

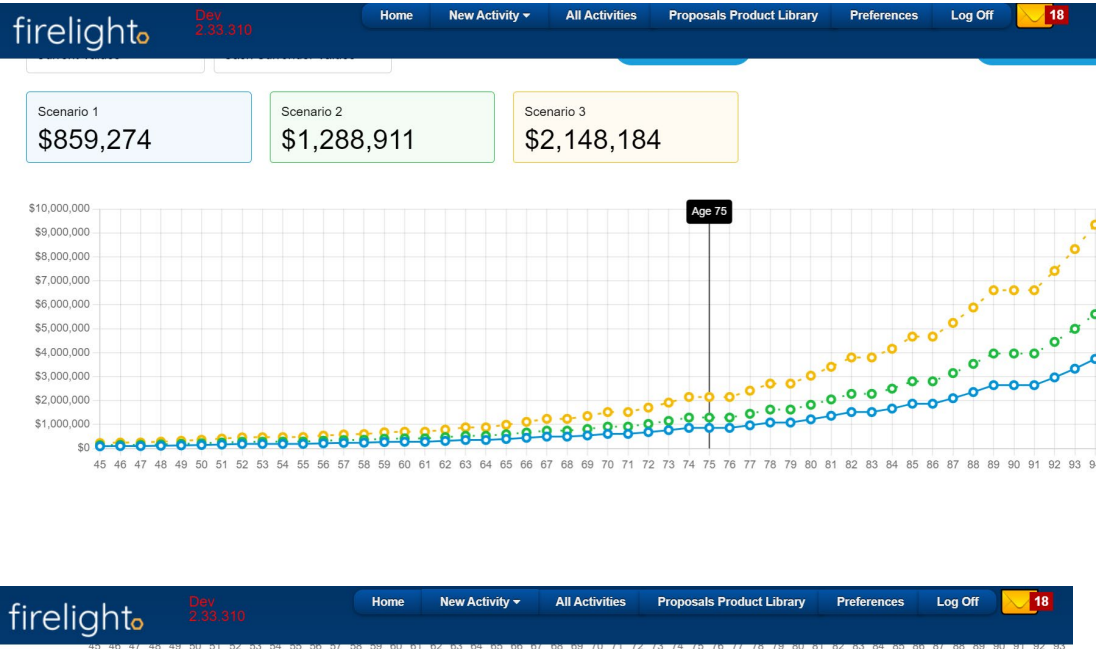
**AG Choice Index 10***American International Group, Inc***American Pathway Fixed 4***American International Group, Inc***American Pathway Fixed 4 - NY***American International Group, Inc***American Pathway Fixed 5***American International Group, Inc***American Pathway Fixed 5 NY***American International Group, Inc***American Pathway Fixed 7***American International Group, Inc***American Pathway Fixed 7 NY***American International Group, Inc***Acceptance Criteria**

- Product details are available on the left-hand side
- The following product filters are available underneath the 'Product Details'
  - Line of Business
  - Product Type
  - Product Sub-Type
  - Carriers
  - Features
  - Demographic

# Visualization

Visualize allows users to compare multiple product options seamlessly, providing clear and intuitive visuals, representing various product scenarios, and enabling clients to make informed decisions confidently.

This new feature allows you to compare up to three different premium scenarios for the selected product. Users can dynamically adjust visually represented data values in real time, facilitating comparisons of even the most intricate products.



Data			
AGE	SOLVE SCENARIO 1	SOLVE SCENARIO 2	SOLVE SCENARIO 3
45	\$90,000	\$135,000	\$225,000
46	\$98,388	\$147,582	\$245,970
47	\$99,352	\$149,028	\$248,379
48	\$112,604	\$168,906	\$281,510
49	\$127,612	\$191,418	\$319,030
50	\$144,607	\$216,911	\$361,518
51	\$163,851	\$245,777	\$409,628

The illustrated products are also compared in a table which is shown below the charts above.

## Acceptance Criteria

- The Solve Data modal collects user inputs or updates previously captured information from the product library filters.
- Users can compare a maximum of three scenarios.
- The graph becomes interactive when hovered over on the age axis.

## **Solve Data**

Solve data is a Dialog modal on the left-hand side, used to collect user input in the workflow this includes:

- State Availability
- Gender
- Age
- Premium

In this current release, our initial offering focuses on calculating premiums specifically tied to income, which serves as the singular default value for this stage of the release.

## Solve Data



State

Alabama ▼

Gender

Male ▼

Age

45

Solve For

Income, based on premium ▼

Premium

Premium Mode

Annual ▼

Add New Scenario

Apply Changes ✓

In Visualize, the default settings feature solving for income based on premiums and premium mode, aligning with the current offering. However, within the Proposal builder, there's no premium mode available, yet the solve-for-income feature based on premiums is also defaulted.

### **Acceptance Criteria**

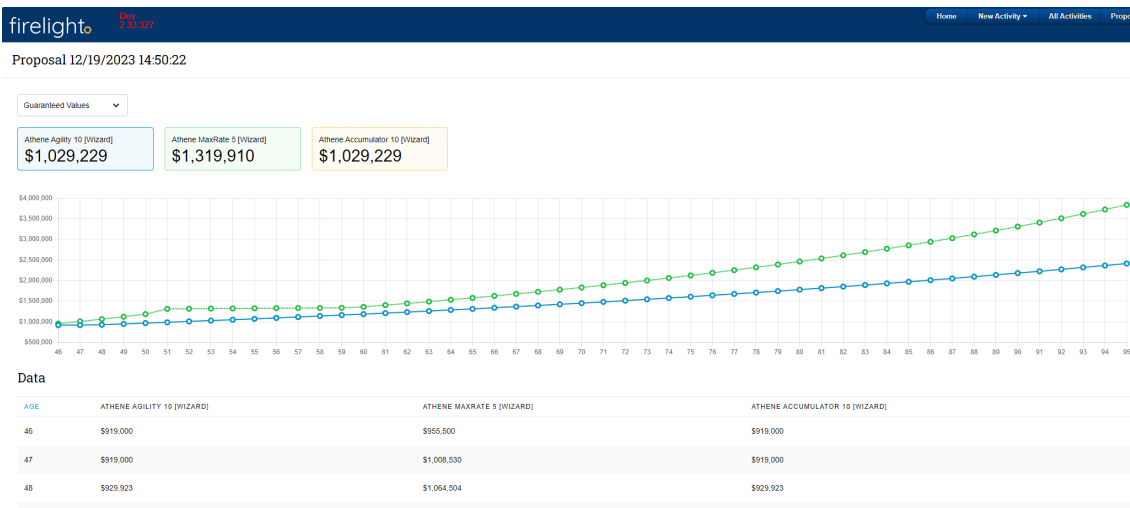
- The Dialog Modal remains open until all inputs are gathered and changes are applied.



# Proposal Builder

In the proposal builder users can compare up to three different products and view the illustrated data in a graph.

Positioned at the top of the graph chart is a dropdown menu, that provides options to view either current values or guaranteed values of the illustrated product.



Certain data might not be accessible for carrier products, and for such unavailable data, you'll receive the response shown in the image below, given that we're currently in the MVP development stage.

We have a strategy in progress to address this issue, aiming to offer more comprehensive data to assist our users in making informed decisions.

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Days 12/19/2023

HomeNew Activity

Proposal 12/19/2023 14:50:22

Current Values

Athene Agility 10 [Wizard]  
Data for this product is currently unavailable

Athene MaxRate 5 [Wizard]  
Data for this product is currently unavailable

Athene Accumulator 10 [Wizard]  
Data for this product is currently unavailable

Oops! Something went wrong

We are having an issue pulling proposal data and were unable to calculate your solve scenario.

- Data for Athene Agility 10 [Wizard] is currently unavailable
- Data for Athene MaxRate 5 [Wizard] is currently unavailable
- Data for Athene Accumulator 10 [Wizard] is currently unavailable

Once these issues have been addressed, try running the proposal again.

## Add Pages

Below the solve data section, and selected list of products, there are additional pages titled "Add Pages." These pages offer specific views of the graphically illustrated data and can be selected accordingly.

Add Pages

(Esc) X

Illustration Views

Cumulative Premiums

This perspective offers a year-to-year comparison of the accumulated expenses. It is beneficial for assessing the total cost of ownership over time.

Account Value

This perspective offers a comparison of the overall cash value within the agreement. This comparative analysis can assist in evaluating its relative performance.

Cash Surrender Values

The Surrender Value represents the sum accessible when terminating the contract. Comparing the cash surrender value can aid clients in comprehending the amount they can withdraw or receive upon contract surrender.

Add Pages To Proposal

The screenshot displays a user interface for configuring a visualization tool. At the top, there is a blue button labeled "Apply Changes" with a checkmark icon. Below this, a section titled "Products (3)" with an upward arrow contains three selectable items, each in a light blue box with a checkmark icon: "Athena Agility 10 [Wizard] Athena", "Athena MaxRate 5 [Wizard] Athena", and "Athena Accumulator 10 [Wizard] Athena". A second section titled "Pages (3)" with an upward arrow contains three selectable items: "Cumulative Premiums", "Account Value", and "Cash Surrender Values" (which has a red minus icon). At the bottom of the "Pages" section is a blue button labeled "Add Pages" with a plus icon.

### ***Acceptance Criteria***

- Users can choose one or multiple specific pages for illustration within the "Add Page" section and can easily switch between these pages.
- Before adding pages, users need to select the available products from the options listed below the solve data section.
- Note that due to the uniqueness of data associated with each product, certain product-specific data illustrated pages may not be available for all products.

### **Additional functionalities offered within the Visualization tool**

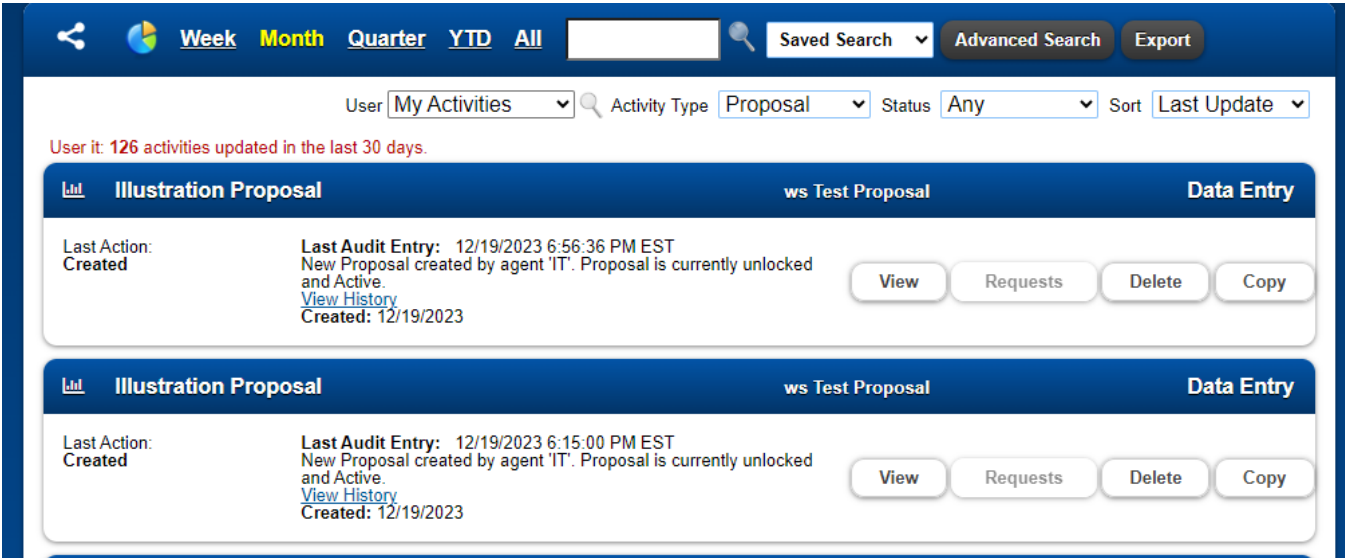
- Save
- Present
- Download



The above-mentioned functionality is positioned at the top-right corner of the integrated application.

### Save

Saved proposals are available and accessed within FL in all activities Tab.



### Acceptance Criteria

- Saved Proposals can be viewed, deleted, and copied as is.
- Access to saved proposals is limited to authorized users, ensuring the privacy and confidentiality of client data.
- Logged-in users can assign a name or title to the saved proposal.
- Users can access their saved proposals anytime for viewing, editing, and downloading purposes.

### Download

A proposal can be downloaded as a PDF and saved to the user's available device.

Sample [proposal \(1\).pdf](#)

### Acceptance Criteria

- The PDF downloads are created dynamically in real-time, meaning that the data within them might be subject to change.

## Disclosure

At the bottom of all illustrated graphical data, disclosure messages are presented to inform users that the displayed values are not binding.

Disclosures: This visualization rendering is a projected estimate based on current market conditions and is subject to change. All proposals are non-binding and are only official once a policy has been approved and executed. Once a product is selected, a full illustration can be utilized to highlight all features and benefits of the product.

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