



Conversational UI for Insurance

The image displays three devices (a desktop monitor, a tablet, and a smartphone) illustrating Aviva's conversational user interface for insurance claims. All devices feature a yellow header bar with the Aviva logo.

Desktop Monitor View:

- Header:** Hi Samantha, please tell me what type of incident occurred?
- Content:** A grid of icons representing different types of incidents: Something Damaged, Something Lost, Something Stolen, Drainage & Plumbing, There's been a leak, and Storm Damage. Each icon has a corresponding text label below it.
- Buttons:** A "Next" button at the bottom center.

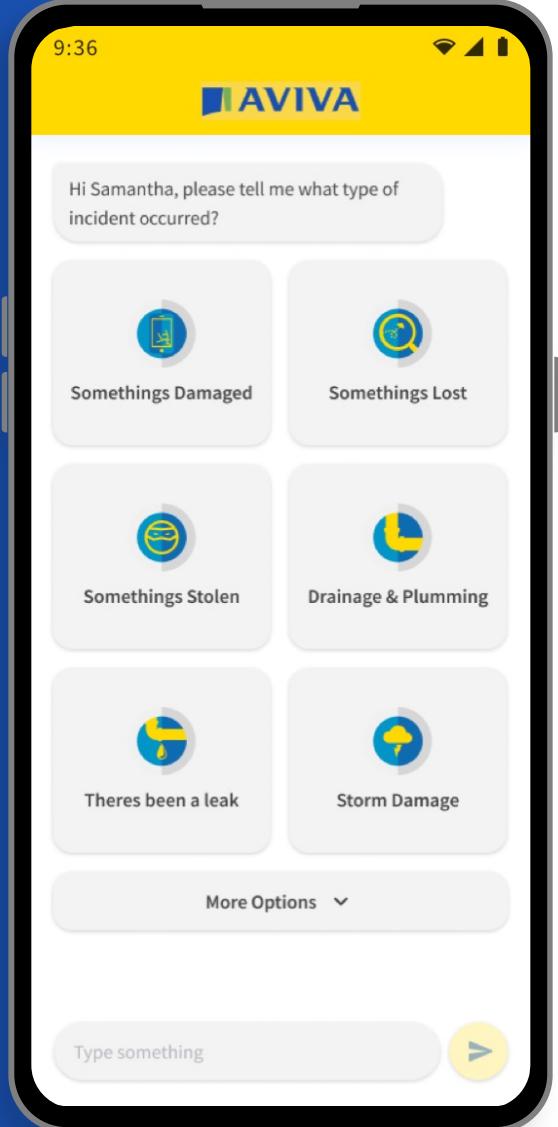
Tablet View:

- Header:** Hi Samantha, please tell me what type of incident occurred?
- Content:** A grid of icons representing different types of incidents: Something Damaged, Something Lost, Something Stolen, Drainage & Plumbing, There's been a leak, and Storm Damage. Each icon has a corresponding text label below it.
- Buttons:** A "Next" button at the bottom center.

Smartphone View:

- Header:** Hi Samantha, please tell me what type of incident occurred?
- Content:** A grid of icons representing different types of incidents: Something Damaged, Something Lost, Something Stolen, Drainage & Plumbing, There's been a leak, and Storm Damage. Each icon has a corresponding text label below it.
- Buttons:** A "More Options" dropdown menu at the bottom right.

Input Field: A "Type something" input field with a yellow send arrow icon is located at the bottom of each device screen.

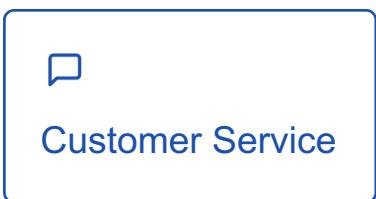


Project Background

A Guidewire's customer needed a conversational UI for their portal where users can come and file their claim without talking to Claims Agents.

Our team worked with the customer to ideate 3 key use cases for the CUI and produced the given feature for them.

3 Use Cases:



Team

1 UX Designer, 1 Product Manager, Sales Team, 2 Partner Customers

Process

The UX for this project was done in an agile environment

Project Scope

Identify the needs and setting up the scope of project.

User Flow

Ideate the key use cases and user flows.

Design

Design wireframes and high-fidelity mockups for multiple platform.

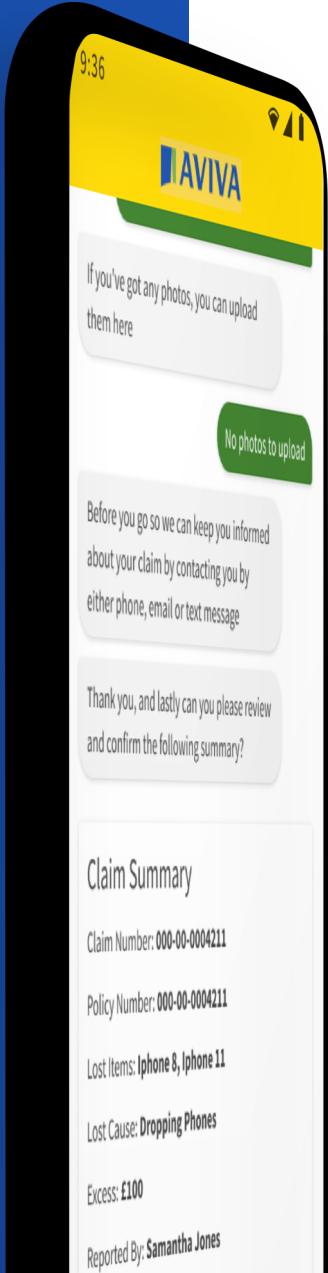
Review

Review flows and design. Gather feedback and design reiteration.

Deliver

Deliver design specifications and guidelines.





Project Scope

Members Involved: 1 Product Manager, 1 UX Designer, 2 Developers

⚠ Problem

Claims Adjuster are usually very busy due to manual assessment of every claims case regardless of complexity of case.

⌚ Need

Straight-forward processing of claims for simple cases without a need of Claims Adjuster involvement.

❓ Goal

Create a robust experience which can be reused for multiple use cases other than claims and therefore reduce the human touch points.

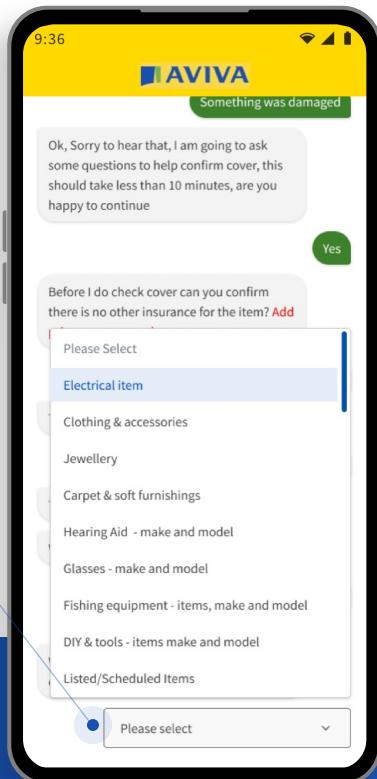
Scenarios

The customer required to support following 2 scenarios for the conversational UI.

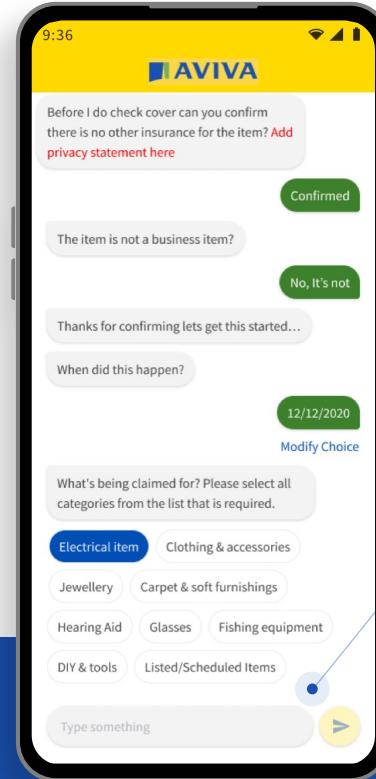


Guided Process

Users are given different UI inputs to interact with based on previous selections.



Controlled Experience



Natural Language Processing



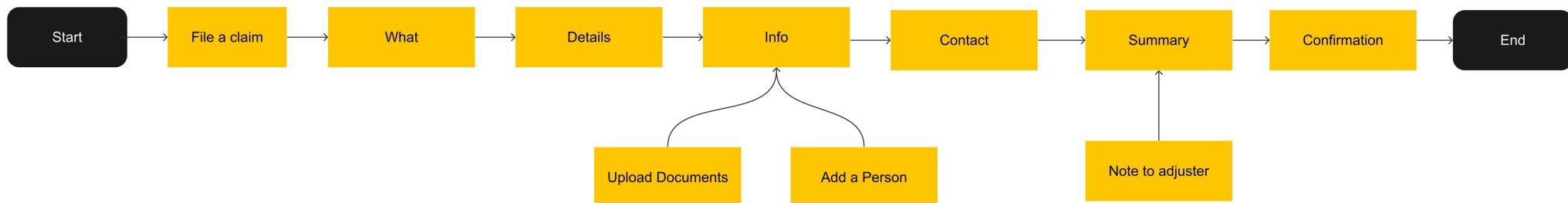
Dynamic Process

Users can use chat box to type in their response or select from provided options.

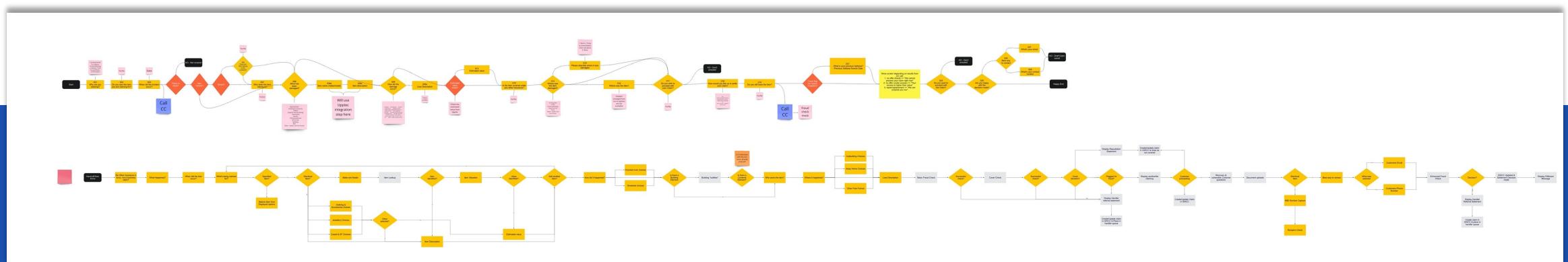
User Flow

The key user flows were designed for a mobile first, and later was adopted for desktop and tablet.

The flows were reviewed and reiterated along with customer and developers.



Detailed User Flows



Initial Work

Market Research

Looking for the market trends and performing competitive analysis.

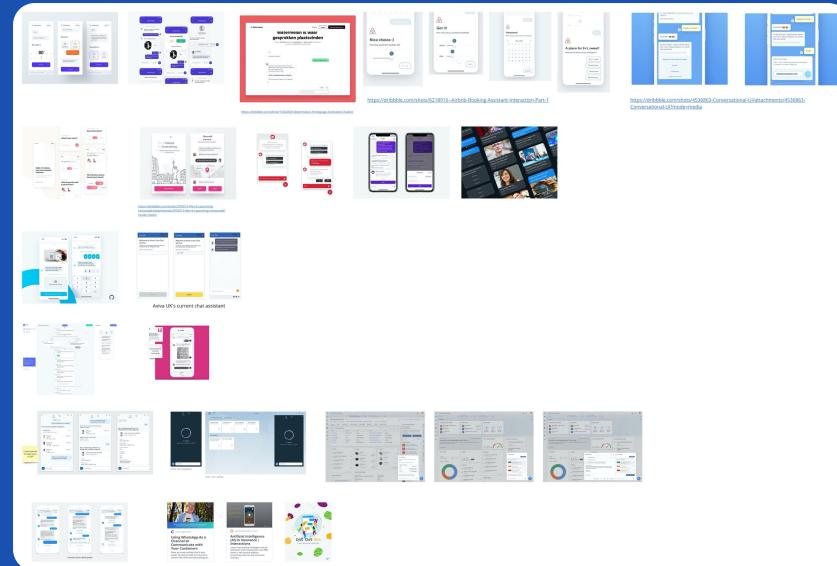
Information Architecture

Breaking down the user flows and creating an information architecture based on it.

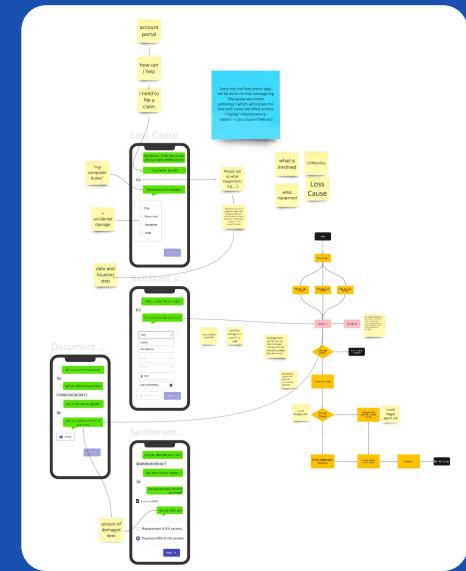
Component Design

Setting up component library to maintain consistency in all screens.

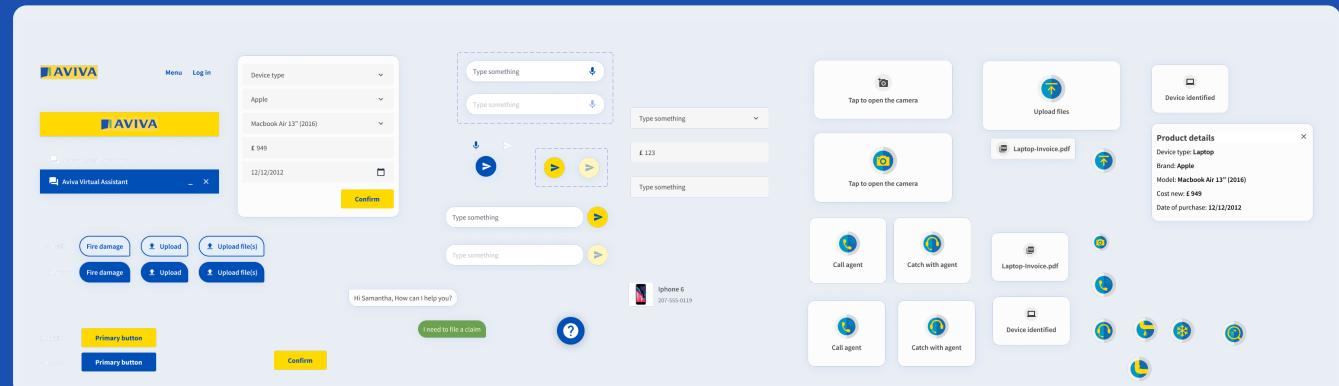
Market Research



Ideation Board



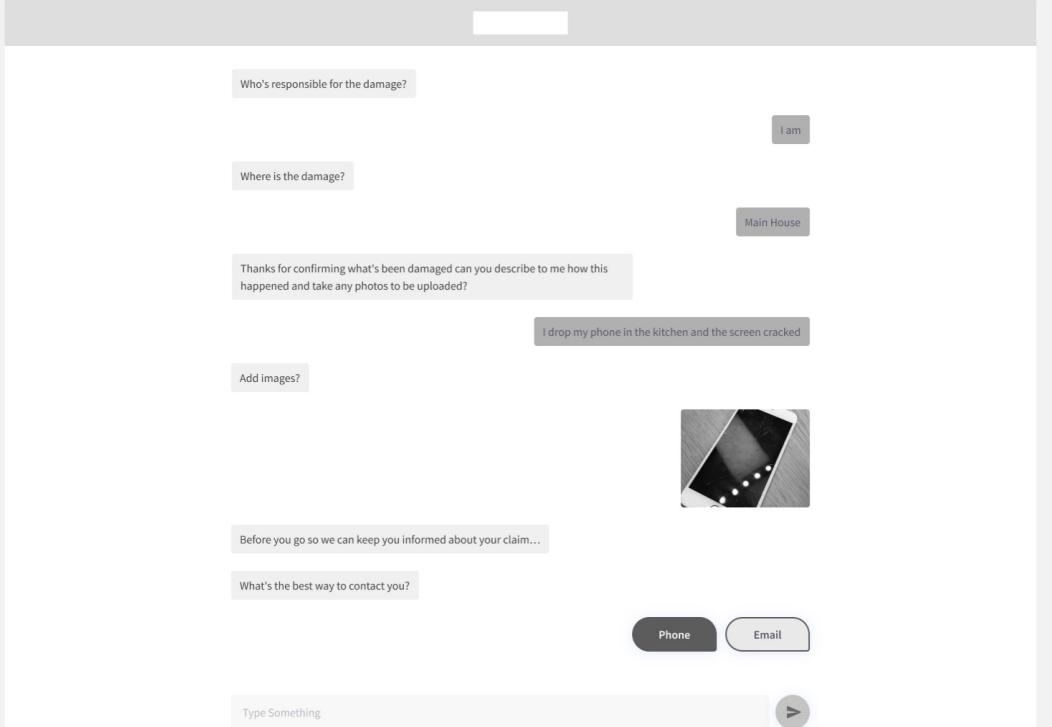
Component Library



Wireframes



The wireframes and ideations were done using Miro and Figma.



Wireframes

💻 Desktop

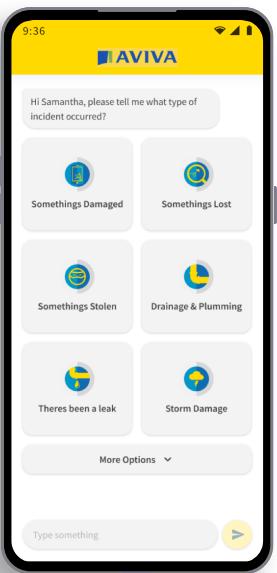


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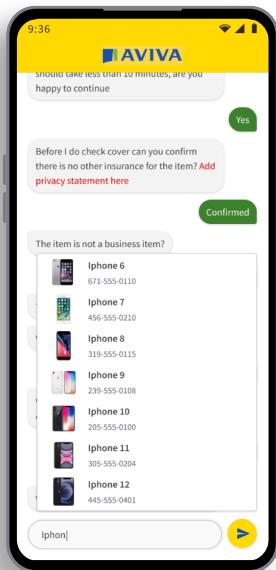
Mobile Design

Some key screens from the user flow

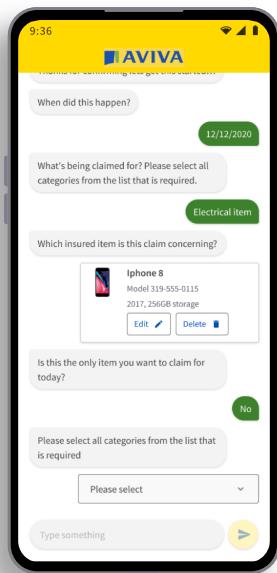
Select a reason



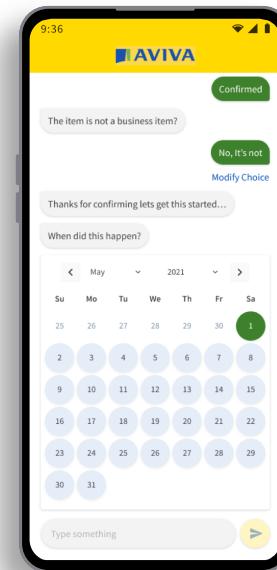
Select an item



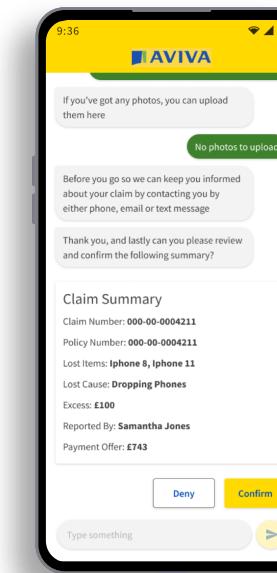
Confirm items



Date of incident



Review summary



Thank You

