

Problem Statement

In the Insurance industry Risk Managers can not evaluate global enterprise-wide exposure across different datasets.

Objective & Goals

Creating a scalable cloud-native solution that enables Risk Managers to have an improved understanding of global exposures and insights into portfolio-wide risk accumulations to enable better-informed business decisions.

Business Challenges

Managing and manually handling that massive amount of data is the main challenge. Data infrastructure needs to get connected to analytics calculations and UI from different companies and provide a seamless User Experience.

Team

Primary team was composed of a SME, the Engineering Manager, the Product Owner and myself as the Product Designer.

Process

First round of iterations were about creating a shared understanding about the project, the datasets nature, the capabilities the product might have and the technology behind the scenes. The parts that would be directly affecting the User Experience are Data Entry and Visualisation, which are defining my scope within the project.

As a first understanding of things I drew a basic visual relationship between objects within the system and how they evolve across time.

Data Entry journey started off with a very low set of wireframes to depict the process, splitted up into 6 steps which were meant to pick and connect very small items to each other.

After a few iterations we ended up improving these steps into only three as we switched the mindset from having lots of independent objects at the same level to pick one kind of primary object that would rule the whole process and focus the user interactions around it, this way we were able to improve the process in order to set up the primary object context for users focus within each selection they make, instead of switching the primary object context within each step of the process.

Data connections are really complex and we couldn't get rid of a big amount of manual process. Nevertheless we'd suggested improvements from the input data in order to provide automatic connections or at least suggestions for users to make this process faster. When we had this Data Entry process as much refined as we could, Error Management came into the game and status, validations, notifications, error preventing and recovering from errors.

The visualisation part got to be implemented within an external service, and after running some proofs of concept with Power BI and Sisense we decided the latter, because of functionality and ability to customise reasons. Dashboard widgets got really similar to the ones I've designed