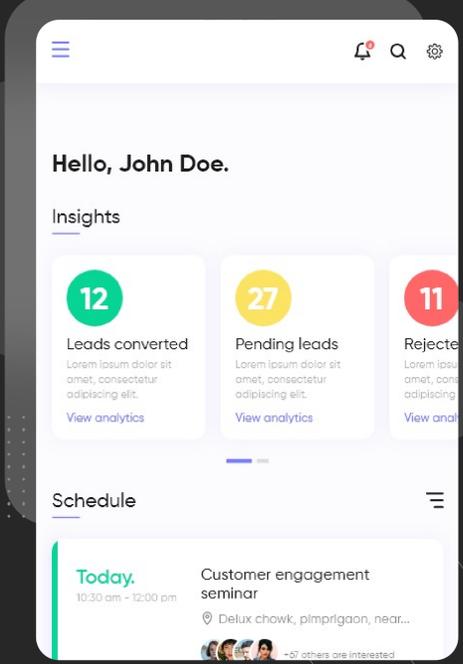


Mobile App



# Keep yourself informed and updated with your daily work goals.

Mobile app design for Insurance agents to keep track on their daily meets, making easy to carry and put up data and analyze their status.



## The challenge

As an insurance agent, sometimes it gets harder to keep track of everything work related like organizing leads, gaining points, keep reminders Etc.

Old methods were useful but not anymore since data inputs has been increased and achieving goals with balancing work schedule has become hectic. The challenge was to come up with the unique idea which will summarized all the necessary things and make it easier to handle for an insurance agents.



## Project Brief

1. Come up with a mobile dashboard page for an agent where he can see the total leads he/she created, pending leads, rejected leads and commission earned.
2. A page shows his total points (from each insurance sales/leads created) and monthly achievements (earned points through referral and others).
3. A Page to show training programs for agents/partners (this can be at Company Office or webinars which he can attend).
4. Show a company club/reward program where top performers can join based on the point system. (Assuming 1000pts are required to become a member. Show where the agents stand now and suggestions for securing the remaining points).

## Core goal

- Ease** Show dynamic as well as static data in such a way it will be easier to understand for the user.
- Clean** Design & choose each element such as icons, typography, colors etc according to the UI UX Laws and correspondence understandings.
- Clear** Clean & Polished Interface which will display each element used in the design as well as step cleanly visible and understandable as per human retina & behavioral perspectives.

## My Role

Hola! It's Hadi R. Shaikh here who learn/work as a UI UX designer from Pune, Maharashtra. OrbiUs Insurance is a mobile app to give ease to insurance agents during their daily work goals and my role was to create one easy-to-understand, clean and clear user interface which will organize, summarize their tasks and give ease to such agents.

## Research

Since the Covid-19 breakout, people are claiming life insurance as well as buying one in the vast majority also in most other cases as well. Most of the MNC's also provides Life Insurance to their employees.

To Understand the daily work life of an insurance agent, I had to meet and take an interview according to questionnaire I made.

## Questionnaire

01. Your name
02. Your age
03. What is your occupation?
04. Doing it as a part-time job or a full-time job?
05. How does it work?
06. What is the procedure to sell and insurance?
07. What are leads?
08. How do you pursue a lead to turn it into a client?
09. Do you use any mobile or desktop application to manage your Insurance selling work?
10. Can leads be divided into other sub-categories? If yes, then what are those?
11. What are the different types of Insurance policies that you provide?
12. Can one person or representative sell an insurance from multiple vendors or he/she can't? And if they can the how?
13. What information do you require from the potential client for create a lead card?
14. How many points do you get per lead?
15. Do different types of leads have different types of points?

## Objectives of the research

According to the questionnaire and the answers gotten through them, I got to understand the following parts:

There are two types of Insurance agents:

- 1) Independent Insurance Agents. (Who can sell many insurance policies from many vendors).
- 2) Captive Insurance Agents. (Insurance agent that works for only one insurance company).

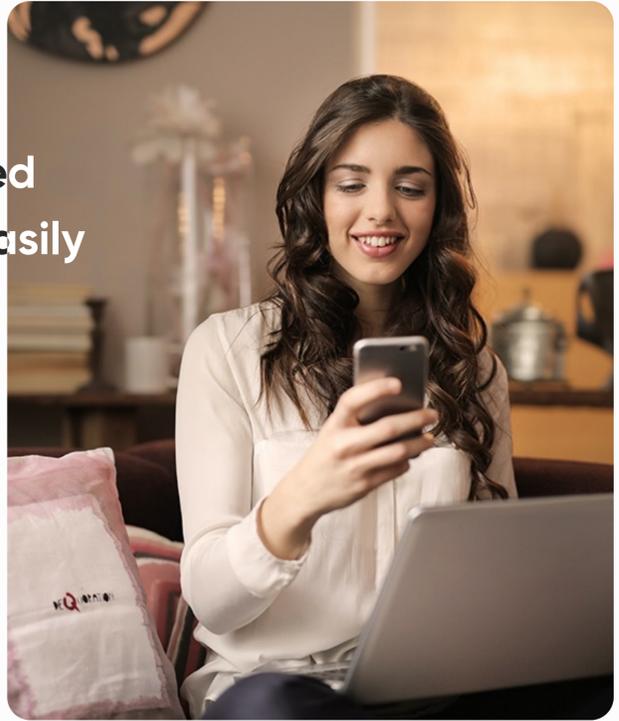


## Easy to use from anywhere.

Design a platform which can be easy to use from anywhere, anytime with hassle-free time to maximize your sells productivity.

## Get all required info quick & easily

The user should not have to search through tons of load of an information to acquire it.

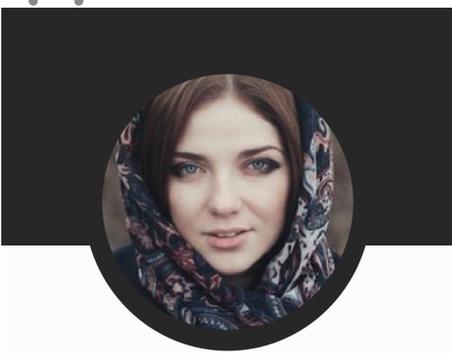


## Organize tasks no matter where you are.

Build the easy communication between the app and a user through clean, clear & sorted design interface.



## User persona



### Mrs. Mirza

Age	--
Profession	Housewife
Location	Nashik, MH.
Marital Status	Married

#### Description

Mrs. Mirza is a housewife from Nashik. She loves to take care of her family. Due to household-chores, she gets little time for herself but she enjoys most of it. She also loves to listen to songs in spare time as well

#### Technographics

Smart Phone	: Android
Other Devices	: None
Tech friendly	: Moderate

#### Brand Affinity

Coca Cola	Samsung
Reebok	Apple
Adidas	



#### Pain Points

Mrs. Mirza loves to help in expenses to her husband. But because of family's responsibilities & also because she has a reserved nature, she couldn't go out for a job that's why she chose to be an independent LIC agent where she can work from anywhere. But since she is a moderate tech woman, she sometimes gets trouble dealing with complicated mobile apps which mostly results into losing a lead or her clients switching to other insurance agents.



#### Needs & Goals

She wants a trustable source which is easy to manage & organize her tasks without stumbling upon any tech difficulties. A clean clutter-free mobile app which will make her work easy, keep her updated during her other activities as well and manage tasks in order to generate more leads & also create an impression on her leads to turn them into clients.



# User journey map



Mrs. Mirza

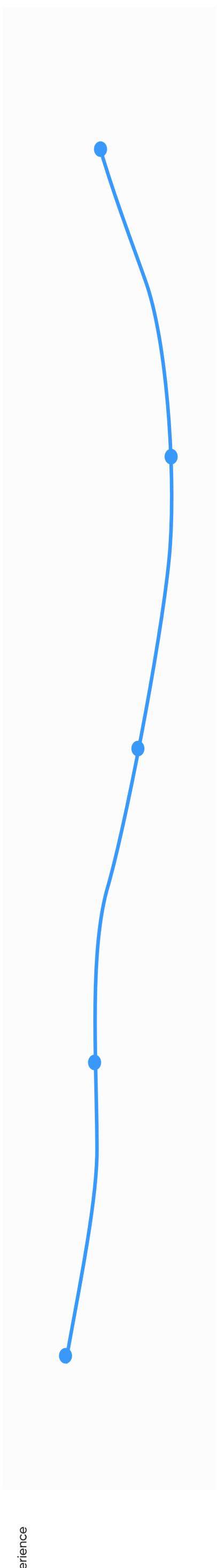
## Scenario

Mrs. Mirza finishes her household work & decides to start soon to get as much leads as she can.

## Expectations

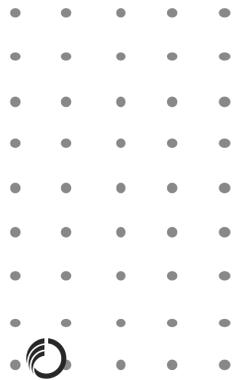
Be easy without any hassle & time saving so that more leads and clients can be earned without any errors.

Phase	Know client needs	Identify Solutions	Propose Plans	Application	Accenptance
Goal	Understand client's requirements and budget to get to know which policy suits them the best and then prepare her recommendations	Identify what the best fit for her client's profile, requirements or budget.	Shows the best fit plan or solutions to the client	Before submitting, go through client's entire profile to create genuine and validate their data.	She makes sure that her lead or the contact knows and aware of all the detailed information of the contract.
Process	She keeps herself in the contact with her clients to make her client's understand the their goals, their budget and assets they carry.	She take out some time to understand her client's needs better to come up with best plans or solutions furthermore to that she ask question before proposing the best plan.	She either talks over the phone or arrange a meeting to present solutions as well as to provide respected material to clients to having them explore it in-depth.	She submits an online application. She also keeps her clients well connected to ensure that all the documents they provide are valid and genuine.	Once the application is fully filled, she submits the application and let her clients knows about it.



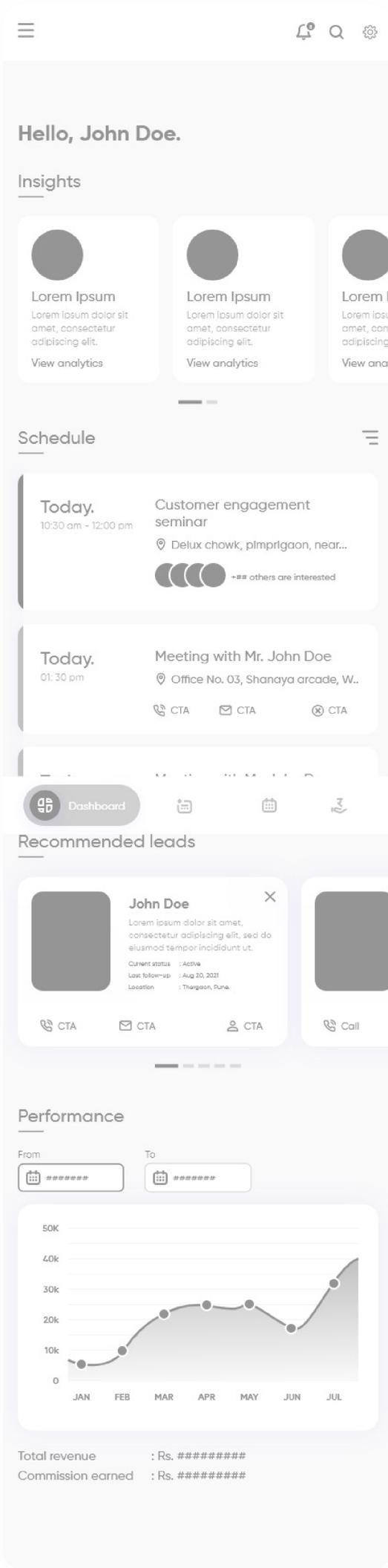
Pain Points	Due to not available all the time format, she sometimes miss getting in contact with a lead or her clients.		Insurance documents or proposal materials contains terms which cant be understood to a normal person. And too many documents present at the time make is longer to search for the right document for the query the client asks.	Application forms are lengthy & has too many steps to fill which takes too much of time. She has to wait longer several days get the application accepted & through online process too many step slow down the submitting process.	Clients or leads gets irritated if the beforehand process is long and time consuming. Frustration of long lasting process and not knowing the data which they input.
Opportunities	Create an option like make it available to her or her clients to leave a message incase of not contact could be done.		Make is simple. Using simple understandable language or material for a common human would be useful. A Search option would be helpful.	Reduce the steps by for personal information, a photo or an UID number of an any respective ID card of the client can be used to fetch data & fill it directly into the form.	If in the beforehand process, step gets reduced, it will be much easier for the client as well as for her to keep patience and complete the task.

# User flow chart

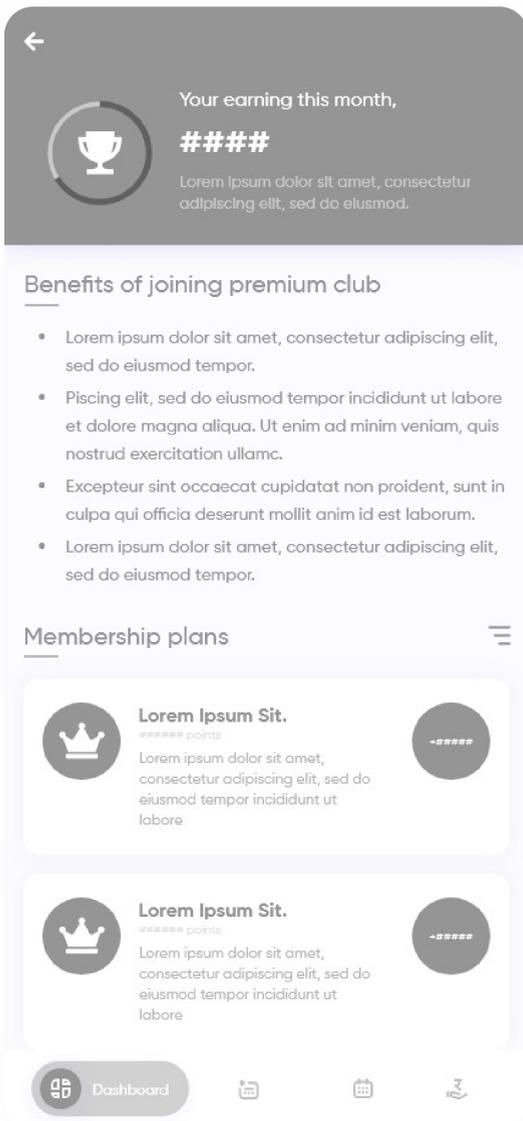


# High Fidelity Wireframes

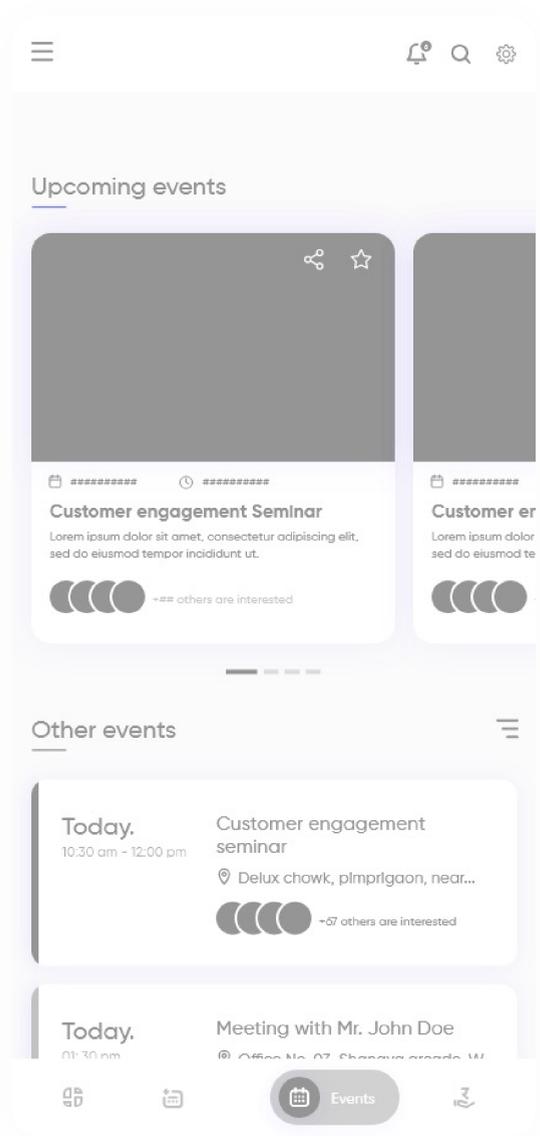
## Dashboard/Homescreen



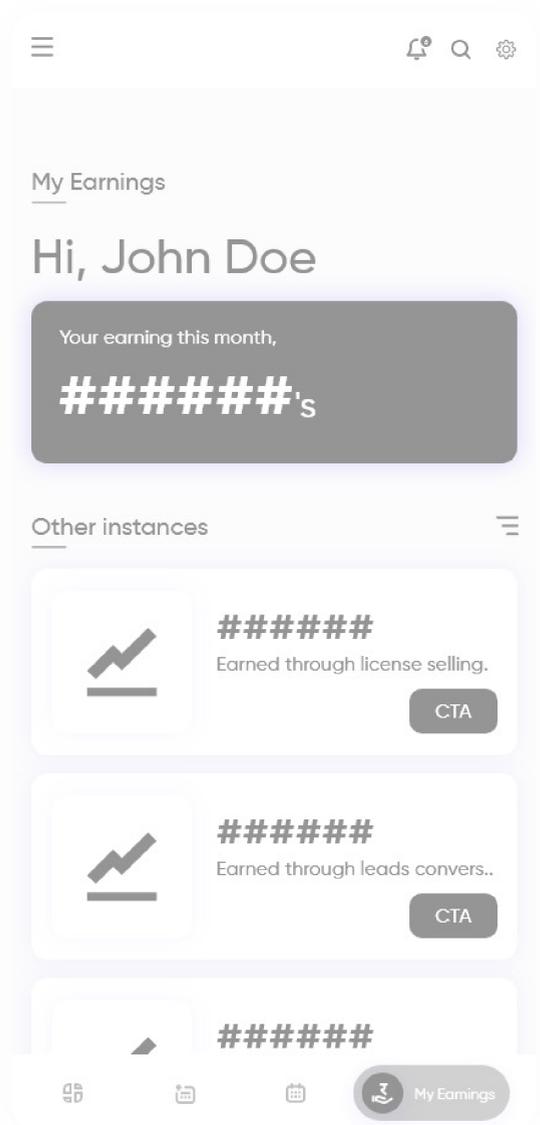
## Reward/Membership Screen



## Events Screen



## My Earnings Screen



# High Fidelity Wireframes

## Dashboard/Homescreen

Navigation icons: Home, Notifications, Search, Settings

### Hello, John Doe.

#### Insights

**12**

Leads converted

View analytics

**27**

Pending leads

View analytics

**11**

Rejected

View analytics

#### Schedule

**Today.** 10:30 am - 12:00 pm

Customer engagement seminar

Delux chowk, plmprigaon, near...

+57 others are interested

**Today.** 01:30 pm

Meeting with Mr. John Doe

Office No. 03, Shanaya arcade, W..

Call Message Cancel

**Today.**

Meeting with Ms. Lorrain Shaw

#### Recommended leads

**John Doe**

Current status : Active

Last follow-up : Aug 20, 2021

Location : Thangoon, Pune.

Call Message Visit

Call

#### Performance

From: March 02, 2020 To: Sept 02, 2021

Month	Value
JAN	~5k
FEB	~10k
MAR	~22k
APR	~25k
MAY	~25k
JUN	~18k
JUL	~40k

Total revenue : Rs. 11,200,365.  
Commission earned : Rs. 90,235.

Navigation: Dashboard, Home, Calendar, Profile

## Events Screen

Navigation icons: Home, Notifications, Search, Settings

### Upcoming events

Fri, Aug 13th 2021 10:30 am - 12:00 pm

**Customer engagement Seminar**

View analytics

Fri, Aug 13th 2021

**Customer er**

View analytics

#### Other events

**Today.** 10:30 am - 12:00 pm

Customer engagement seminar

Delux chowk, plmprigaon, near...

+57 others are interested

**Today.** 01:30 pm

Meeting with Mr. John Doe

Office No. 03, Shanaya arcade, W..

Navigation: Home, Calendar, Events, Profile

## My Earnings Screen

Navigation icons: Home, Notifications, Search, Settings

### My Earnings

# Hi, John Doe

Your earning this month,

## 1,25,035's

#### Other instances

**85,000**

Earned through license selling.

Know more

**15,124**

Earned through leads convers..

Know more

**07,108**

Navigation: Home, Calendar, My Earnings, Profile

## Reward/Membership Screen

Navigation icons: Home, Notifications, Search, Settings

### Your earning this month,

## 80,015

7,576 points more your reach to premium membership goal.

#### Benefits of joining premium club

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.
- Piscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamc.
- Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
- Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.

#### Membership plans

**Silver Membership**

1,85,511 points

~20,000

**Gold Membership**

1,85,511 points

~20,000

Navigation: Dashboard, Home, Calendar, Profile