

CASE STUDY PRESENTATION - 2018

ClientDesk Inc.

About the company, roles, and branding

ABOUT

A leading software platform for independent insurance brokerages that powers core functions of the digital insurance experience such as Engagement, Self Service, and Claims Management.

Providing web portals and mobile apps for policyholders and front-line staff such as brokers and CSR's.

TECHNOLOGY

The platform can be integrated with legacy policy administration systems through web service calls, enabling the real-time transfer of policy data and activity logs.

ROLE

UX/UI Designer: discovery, ideation, user research, interaction design, branding

TEAM:

Co-Founder/Head of Product, Sales, Engineering

TIMELINE

3 months

BRAND PALETTE



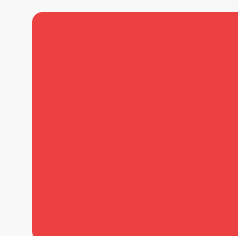
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PRIMARY



#016837
SUCCESS



#F8CB81
WARNING



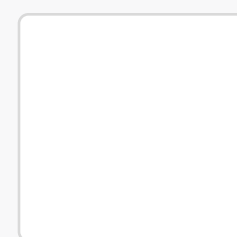
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ALERT

ACCENT



#466A79

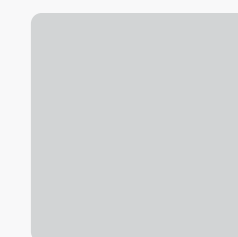
NEUTRALS



#FFFFFF



#787E80



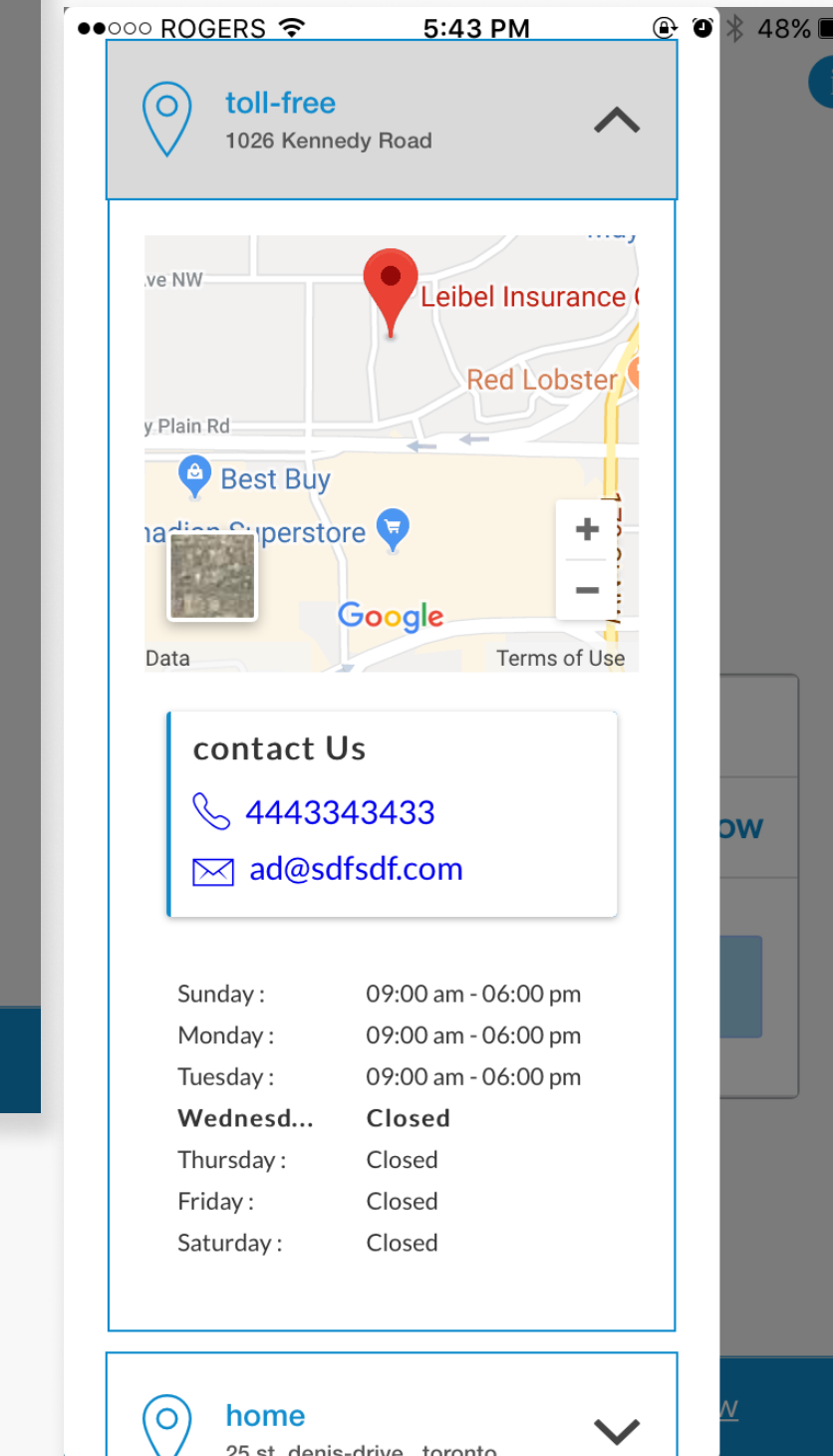
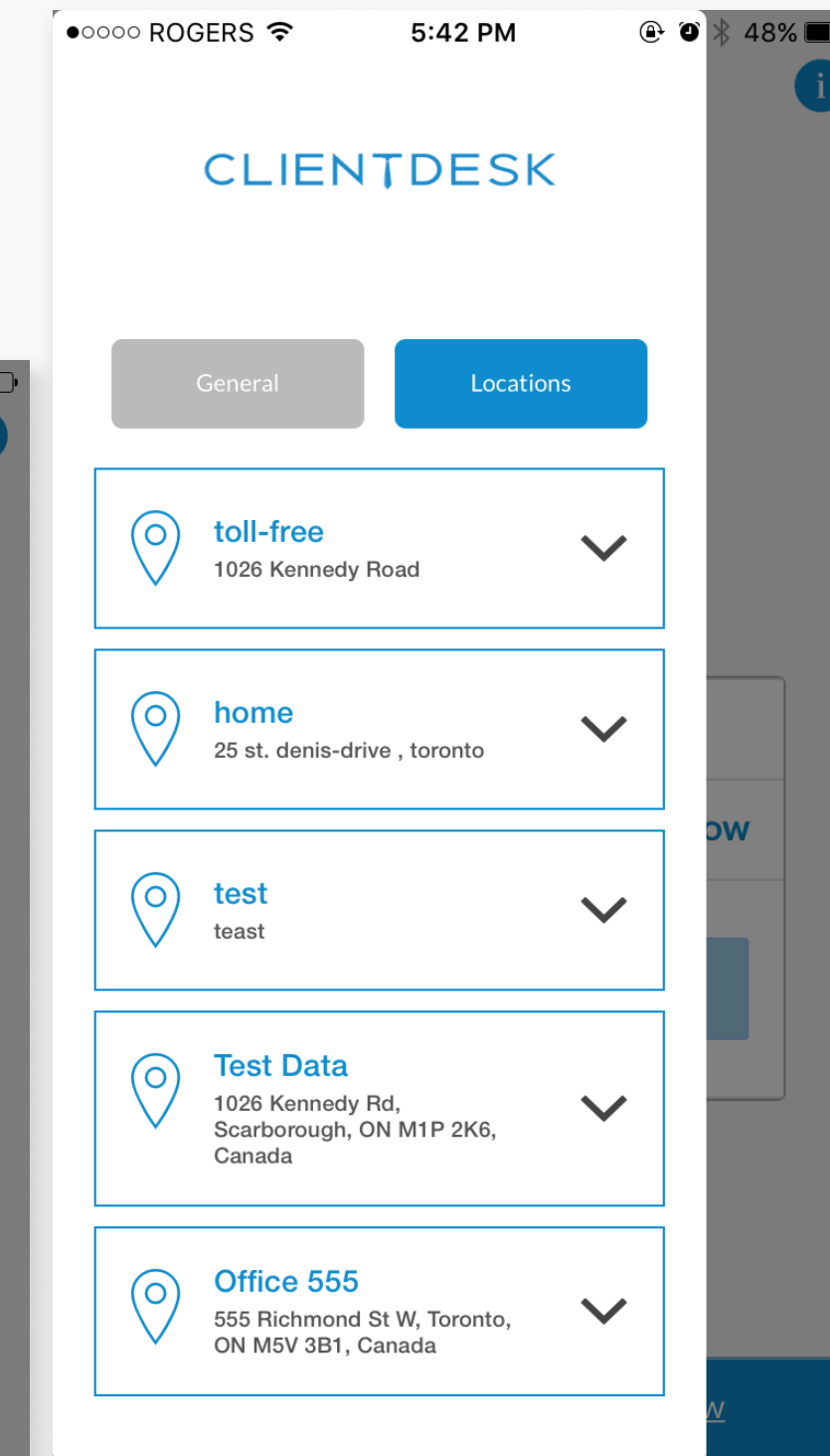
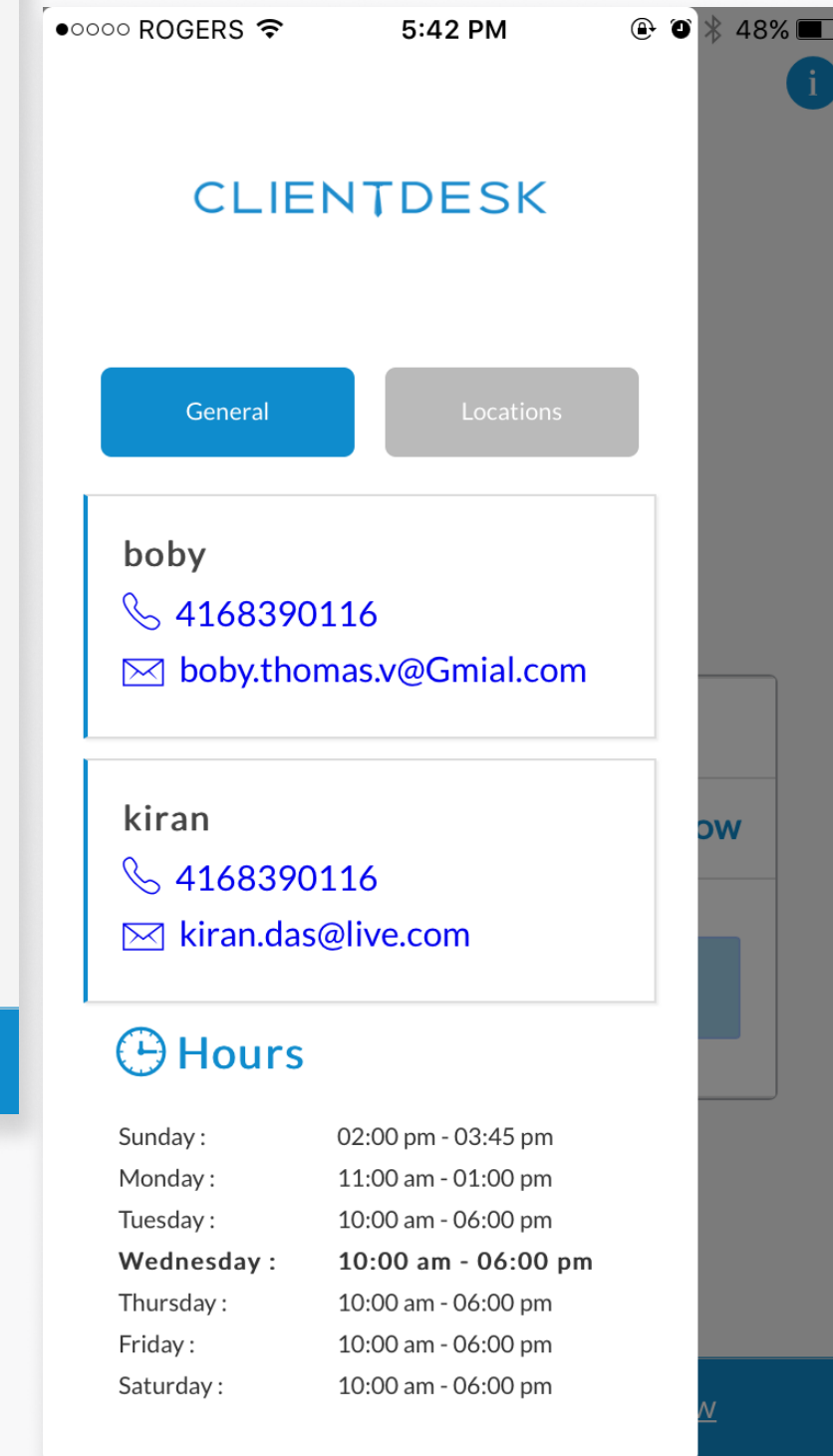
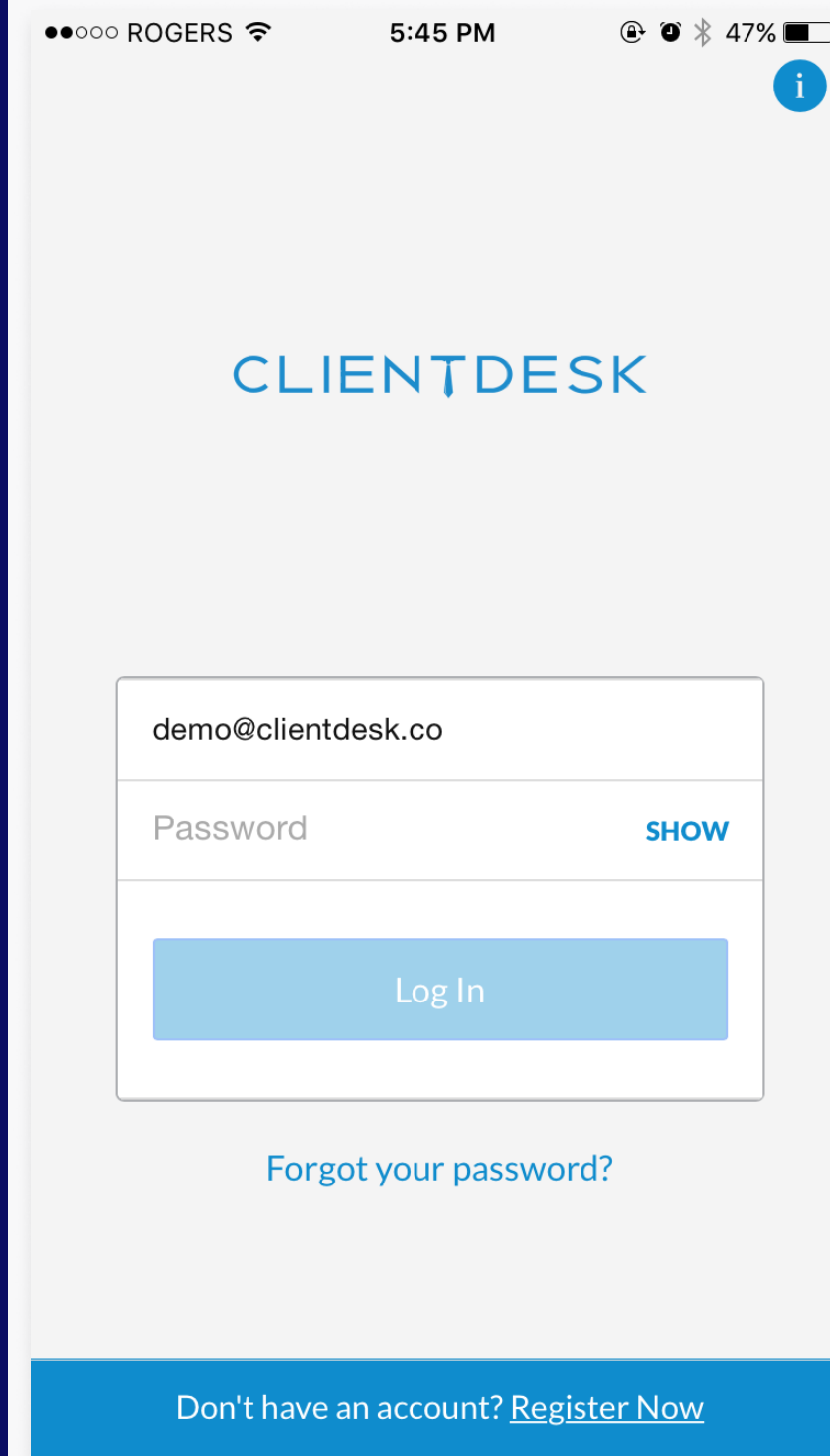
#D2D4D5

FONT

Primary: Raleway

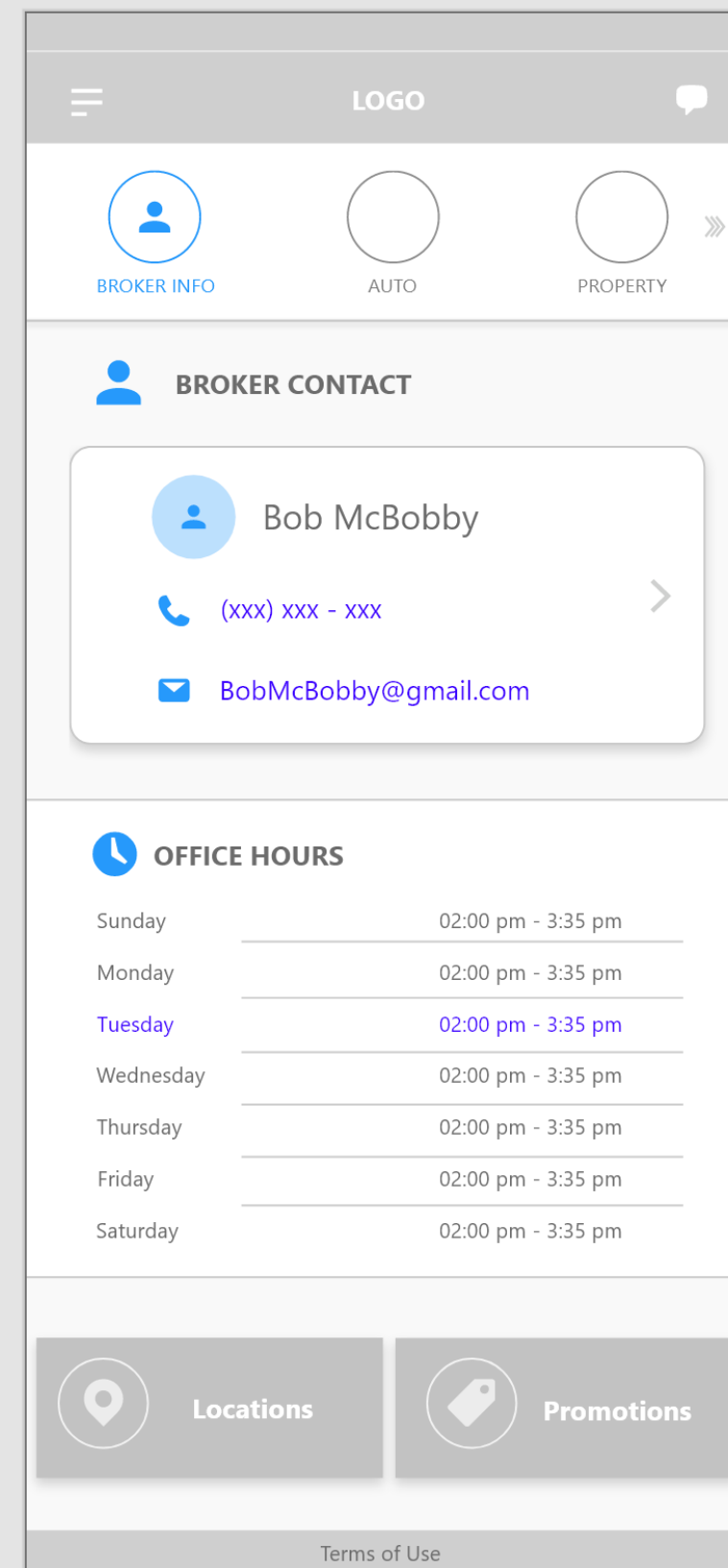
Secondary: **Slabo**

Pre-Redesign



Wireframes

iPhone X – 1 - Homescreen - Broker Info



Broker Contact Screen

Top Nav

Will be highlighted in different colour to indicate it is active

Empty Circles to be filled with icons

Double Right Arrows are swipe right to scroll through options

Contact Card

Clickable text will be highlighted in different colour and will pop up 'call now' or email specified email address

Right arrow to click to next contact card

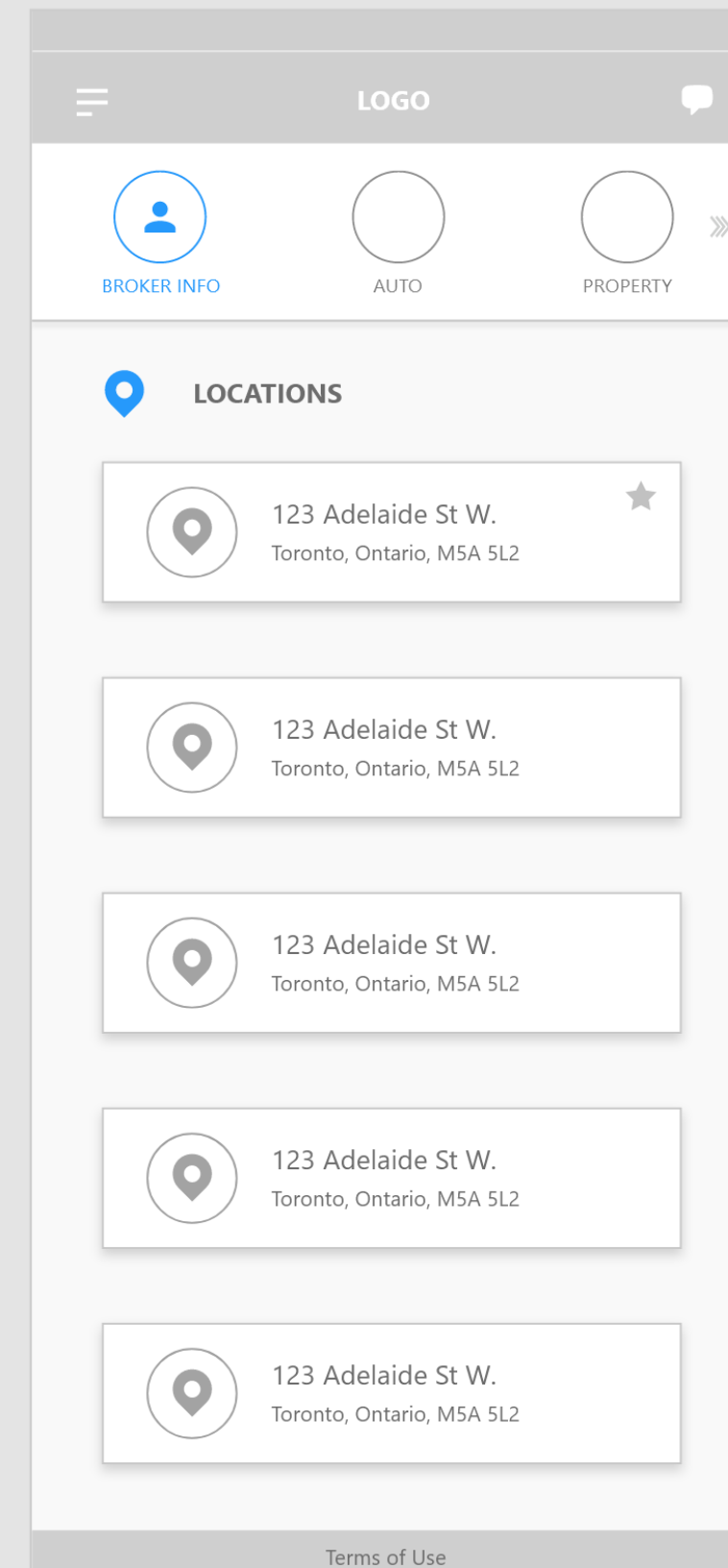
Office Hours

Keep the same style of identifying the current day of the week

Promotions

If there are no promotions this button can be

iPhone X – 1 - Locations



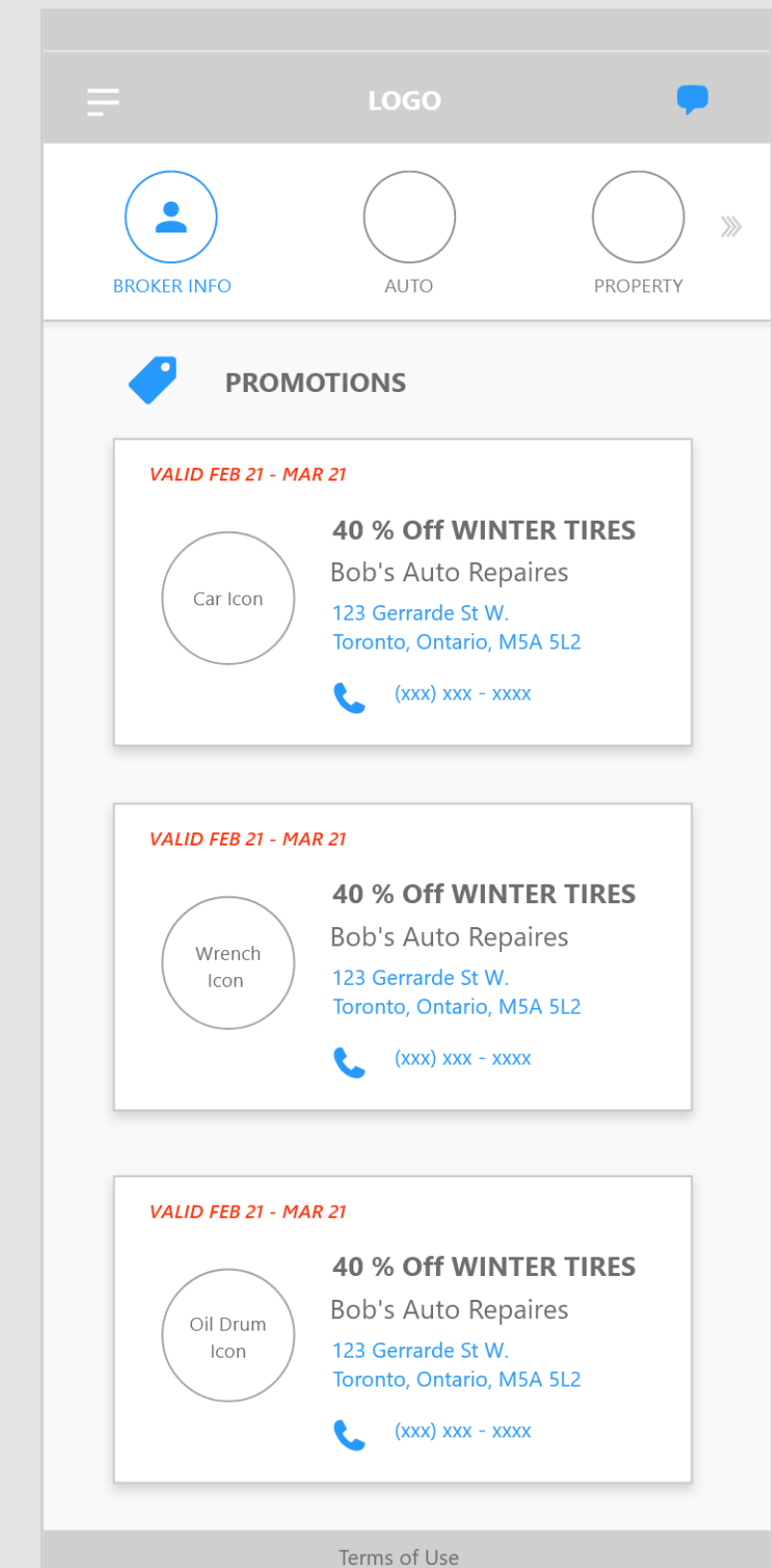
Locations screen

Clicking on one of the locations will result in a prompt to take you to a maps app or browser or download their maps app.

The Star indicates their preferred location

Require Swipe Back to get back to previous Screen

iPhone X – Promotions

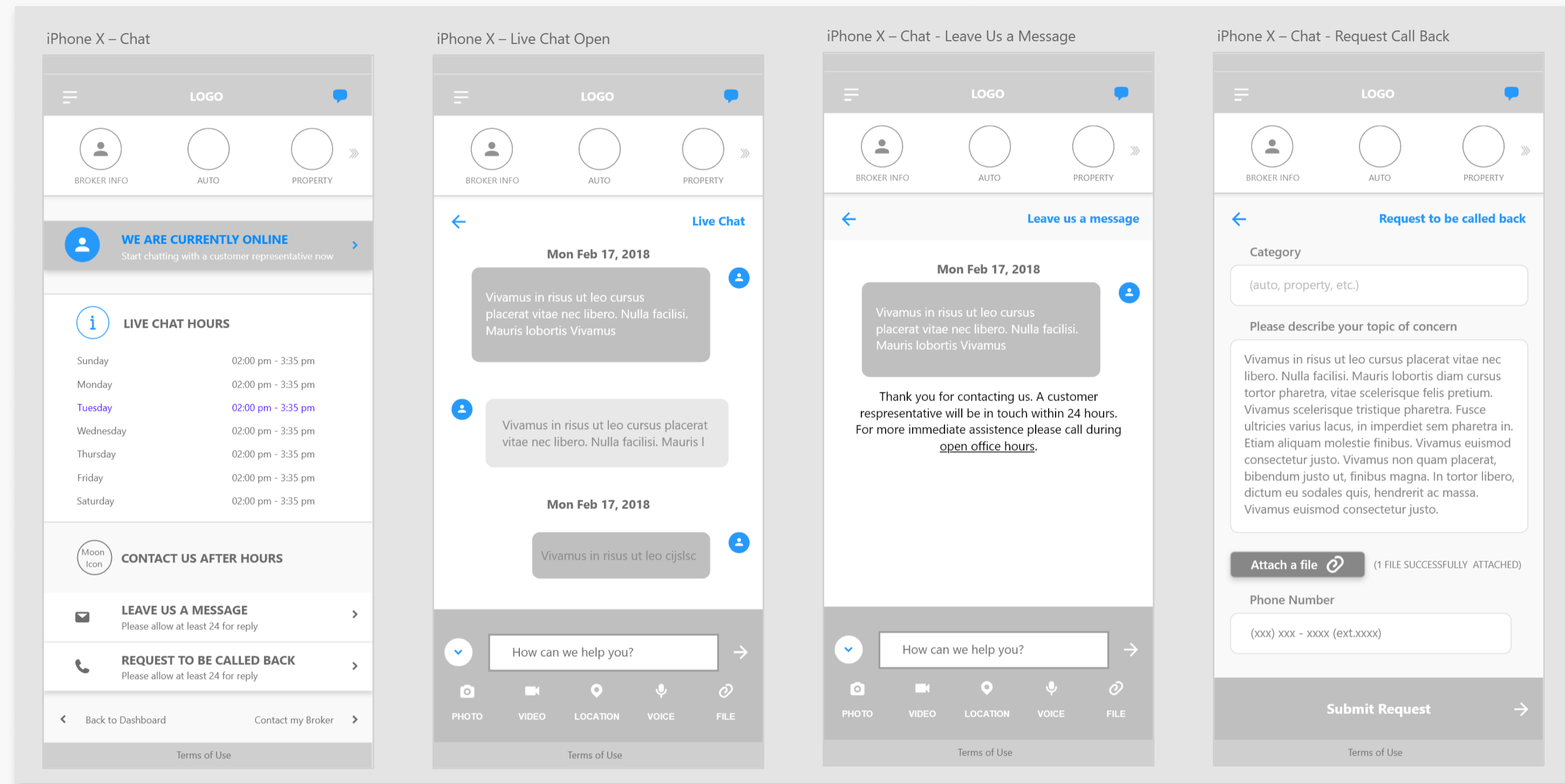


Promotions Screen

Clicking the promotions will pop up 'call location' window

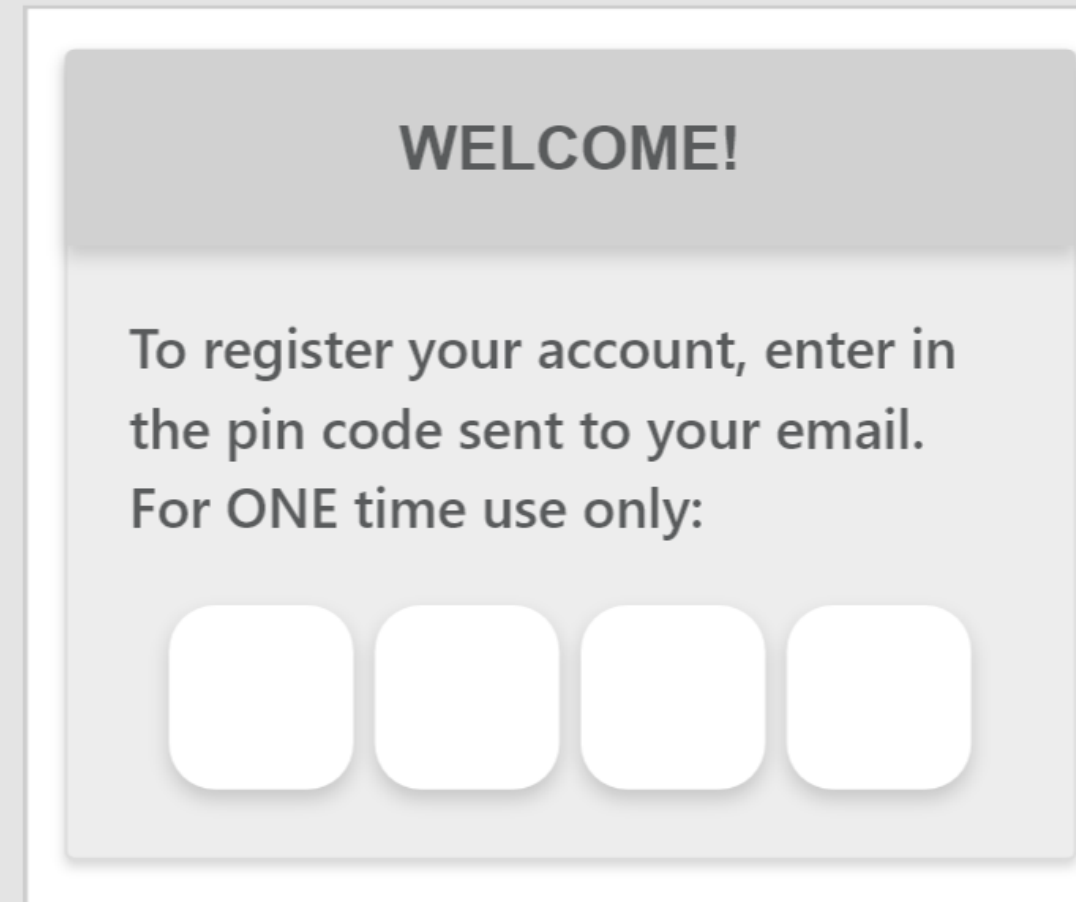
Swipe Back to get to Previous Screen

Wireframes



Wireframes

iPhone X – New User Pop-Up



Login Screen UXs

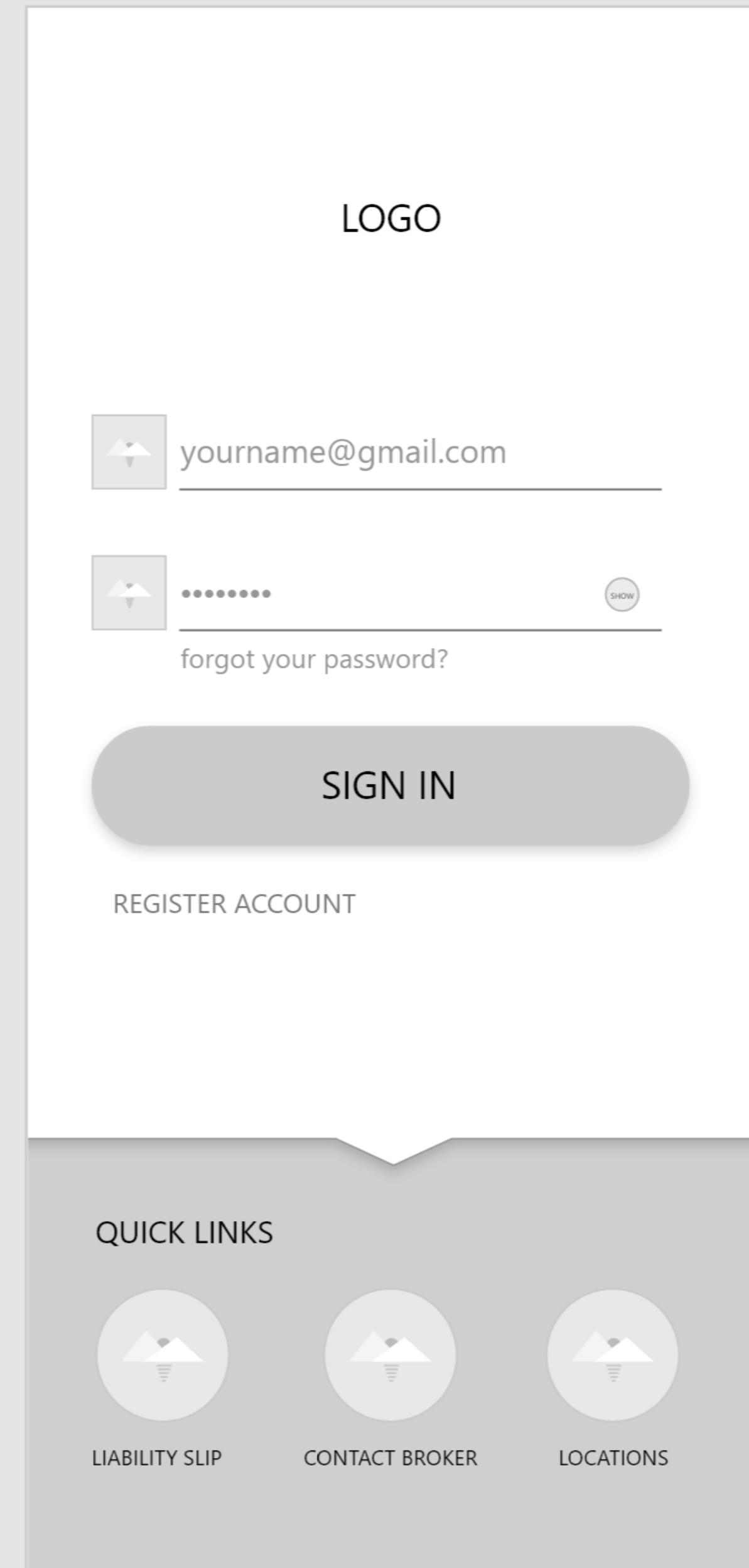
First-time registration

- new user pop-up pops up when new user detected
- if there is no pop-up for new user, they have the option to click 'Register Account' under the 'SIGN IN' button

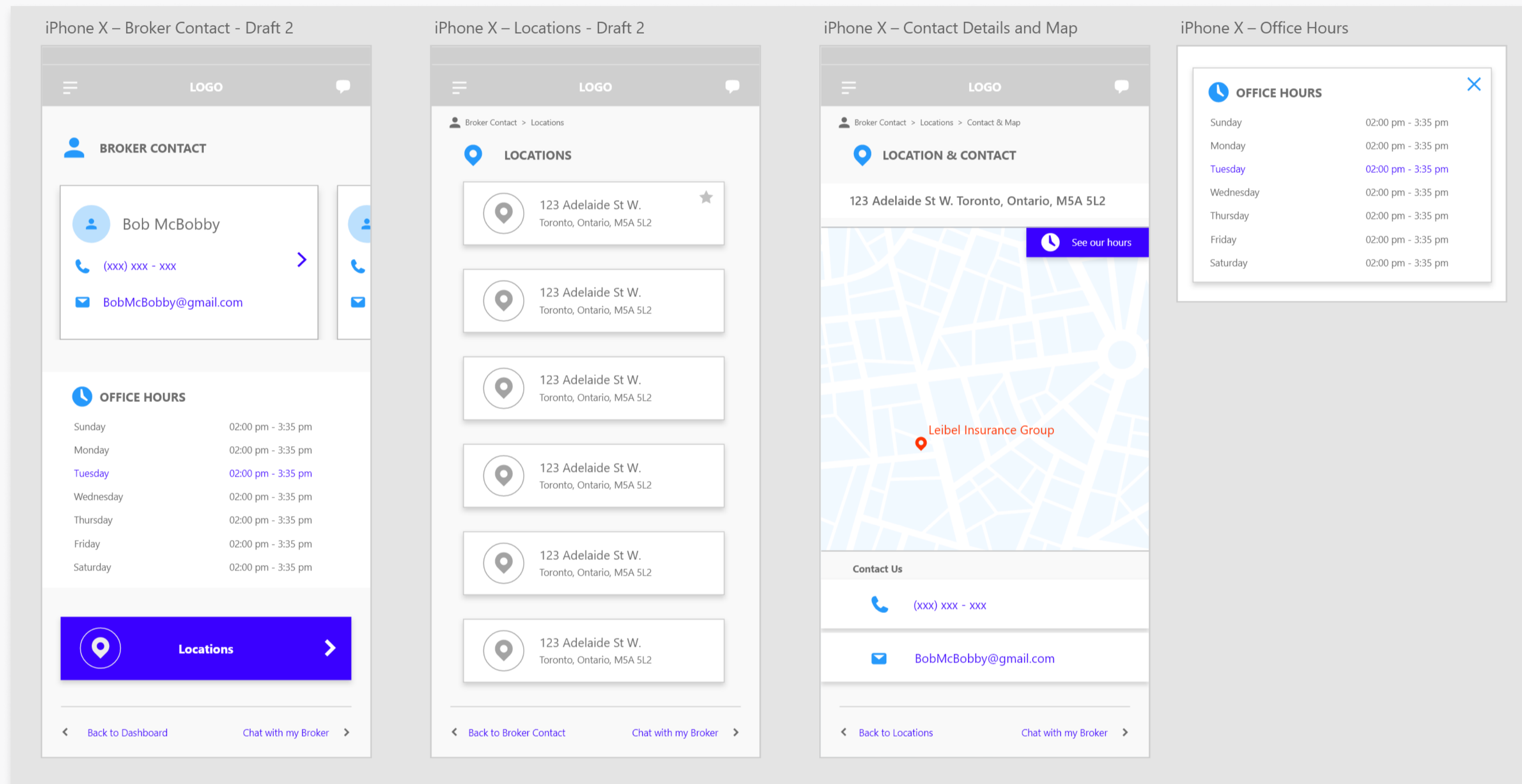
Touch ID Options

- If an existing user is logging in and they authorize Touch ID, the Touch ID pop-up window should appear when they touch the EMAIL ADDRESS fields, AND bottom panel QUICK LINKS

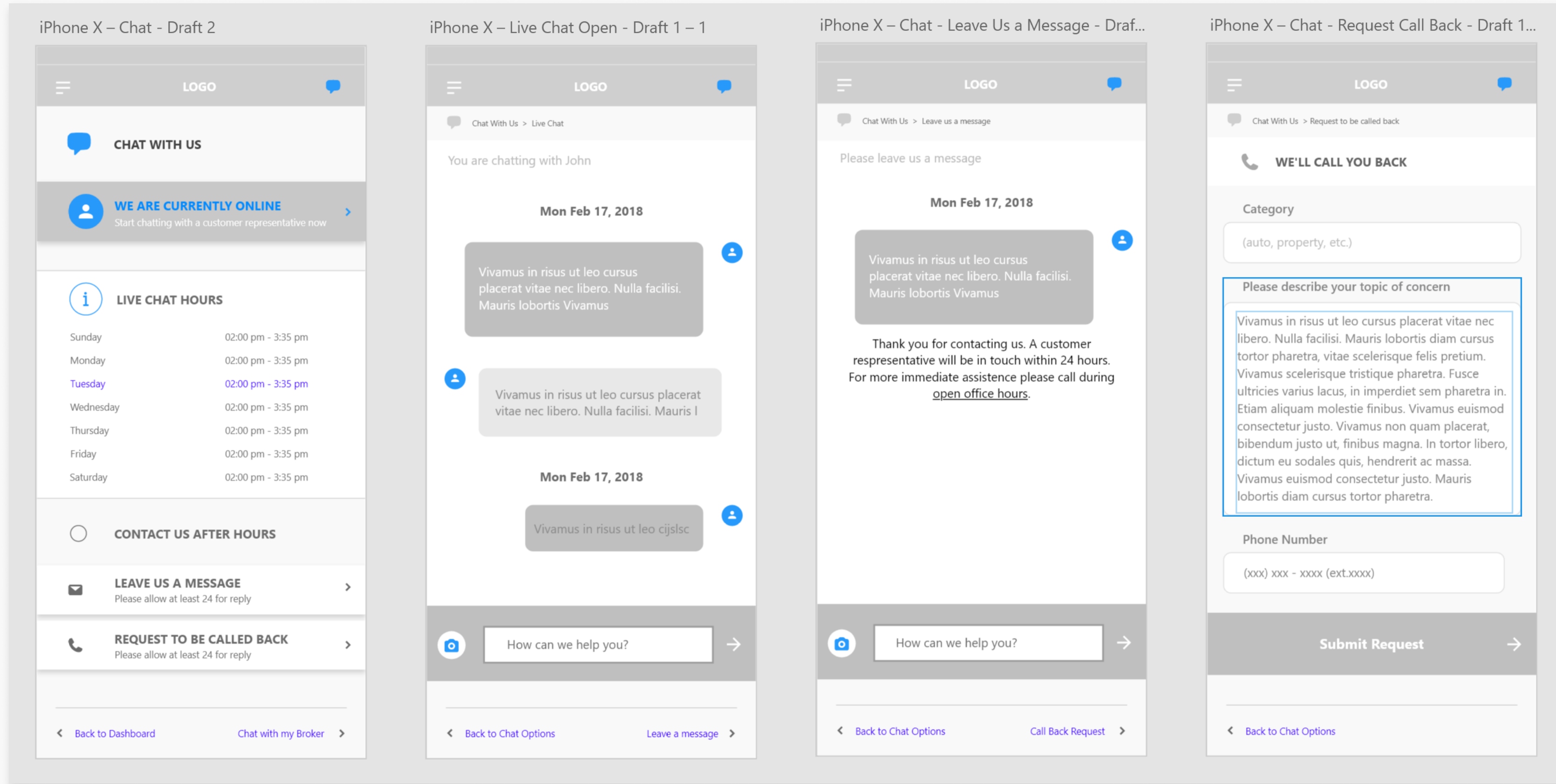
iPhone X – 1 - Login - Sign in



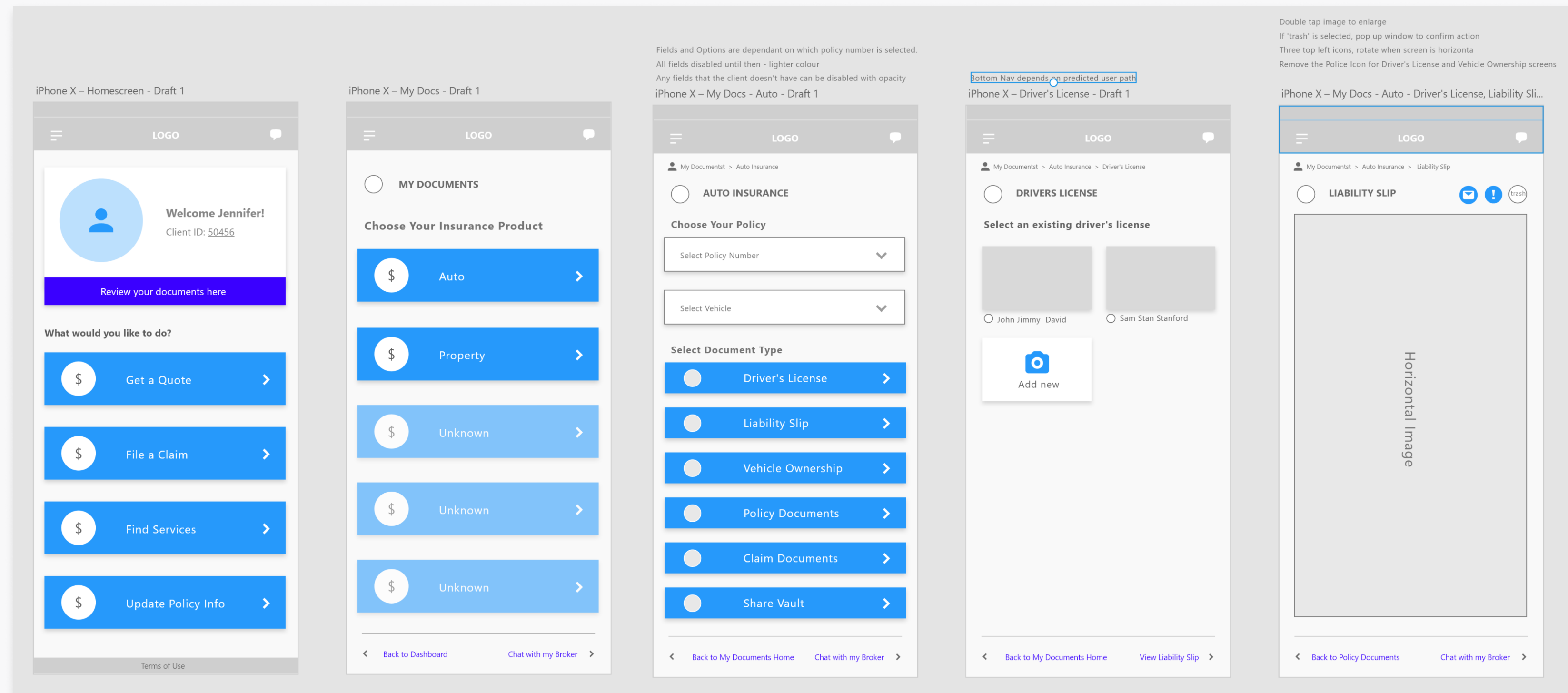
Mid-Fidelity Mockups



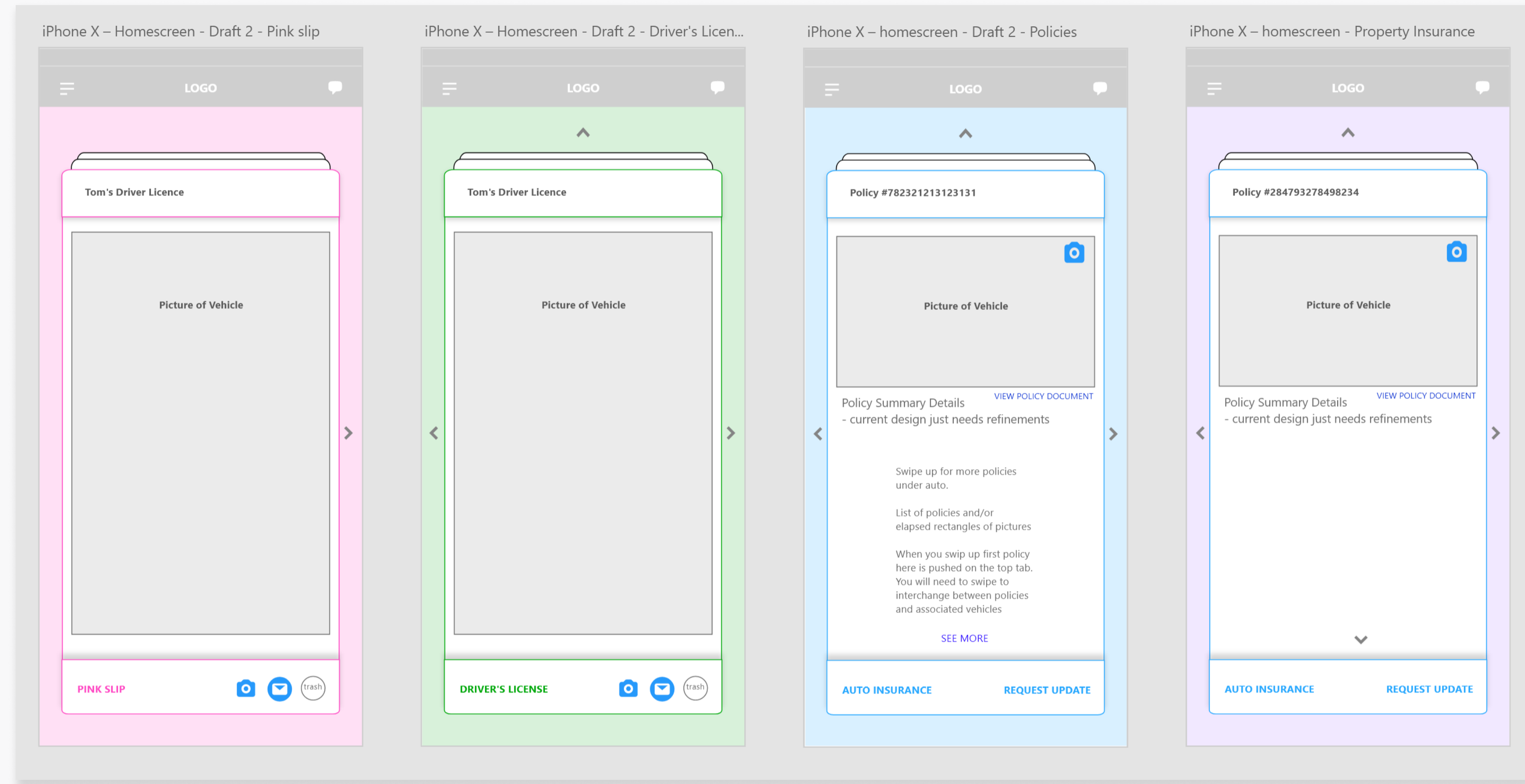
Mid-Fidelity Mockups



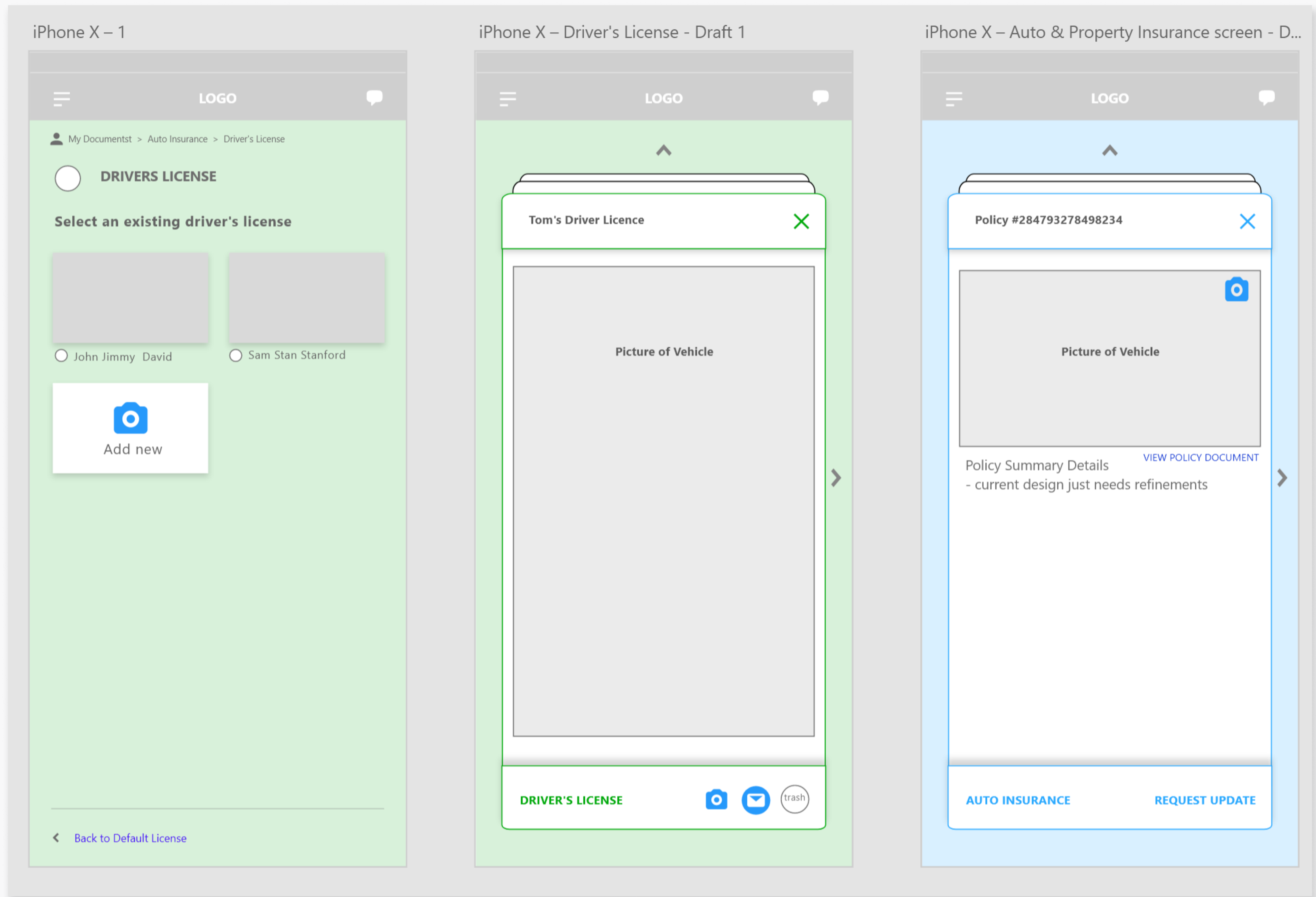
Mid-Fidelity Mockups



Mid-Fidelity Mockups: Card Swiping & Gamification




Mid-Fidelity Mockups: Card Swiping & Gamification





High-Fidelity Mockups

Phone X – Mockup 1 - Login

CLIENTDESK

 Email Address _____




 Password _____ 

Remember Me [Forgot Password](#)

SIGN IN

[Register Account](#)

QUICK ACCESS

 Files  Contact Broker  Locations

[Terms of use](#)

iPhone X – Mockup - First Time LN

CLIENTDESK




WELCOME

To register your account, enter in the pin code sent to your email. For ONE time use only:

SIGN IN



[Register Account](#)


QUICK ACCESS


 Files  Contact Broker  Locations



[Terms of use](#)


iPhone X – Mockup - Homescreen

 **CLIENTDESK** 

 Swipe left or right to select your insurance product

 **NIMA 012345678**




2015 Chevrolet Malibu 4DR 

Insurer **Economical Select**

Expiry **2018-05-28**

Premium **\$885.00**

SELECT YOUR DOCUMENT

 Policy Docs  Pink Slip  Driver's License

version 2.52

OUTCOME & LEARNINGS

Business & Product

- The redesigns were launched about a month after the contract ended
- Within the next year, ClientDesk was bought

Learnings

- At the end of the 3-months, I was asked to extend my contract but declined, seeking to continue my career growth elsewhere
- As the only designer for a small startup, I learned a lot from a team of 5 engineers, and the importance of communication throughout the design process
- My ability to quickly design various iterations, helped to solidify product vision, design decisions, and enabled teams to roadmap more efficiently
- I learned a great deal about the insurance industry, and continue to apply these learnings in my daily life

CLIENT TESTIMONIAL

It was a great pleasure working with Amanda. Her charisma to learn and build on her assets to not only better herself but to deliver out a complete project was impressive! Amanda, within 4 weeks, connected with the right business stakeholders and client-facing team members to learn more about the product and current customer experience to pump out wireframes in just a few days of taking on the project. By the second week, our team had a full UI/UX canvas ready to discuss and provide feedback for the new app. By the third week, our team was excited to get hands-on with the latest mocked designs to get started with product development.

Her ability to filter the business needs and understand the consumer "wants" of an industry she has never worked with before only proves her willingness to learn and energy to deliver is applaudable.

I wish her good luck with her future endeavours and hope to work with her again!

AMANDA CHIU