

PolicyBound

Chandu Majeti



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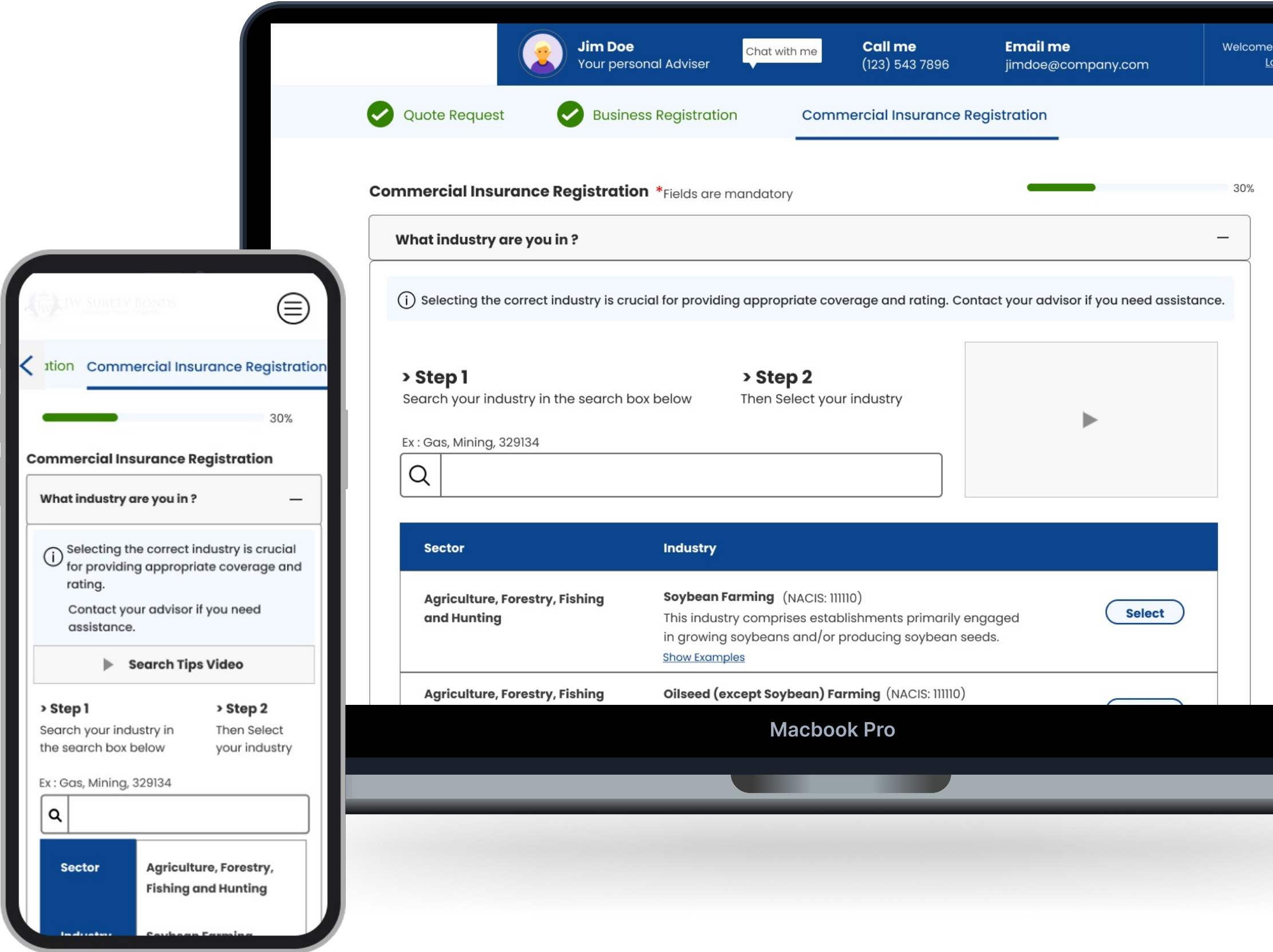
Project Overview

Product

PolicyBound helps insurance brokers thrive in the digital age by leveraging technology to enhance client engagement and secure competitive advantages that were once reserved for an elite few.

Project duration

Worked 3 years in this project.
Oct 2020 - Jan 2024



Project Overview



Problem

Bond/Industry selection flow : The application flow has navigational and user interface issues, preventing users from completing the coverage process.



Goal

Users can easily navigate the coverage process and smoothly complete the coverage flow, which also helps businesses increase their conversion rates.

Project Overview



My Role

UX Architect

Responsibilities

- I was the UX lead and interacted with CEOs to understand their pain points and needs.
- Created one persona.
- Conducted expert reviews on potential existing screens.
- Created wire-frames and concept sketches.
- Designed all the visual designs.
- Provided style guides to development team.

Don't jump into design first.

Understanding the user

User research

Persona

SME- Walk thru the application & provided screenshots

Expert review

User research

Interviews

- Interacted with SME to understand needs and pain points in the screen.
- Due to existing project asked the client team to walk thru of the application flow/ screenshots.

The collage displays five screenshots from the JVI Surety Bonds website, illustrating the application flow:

- Top Left:** A 'Questionnaire' form with a progress bar and sections for 'Where is the home office of SET?', 'Answer on behalf of SET', and 'Answer on behalf of all owners and SET'.
- Top Center:** A 'Who owns SET?' form with fields for 'Owner Type', 'Title', 'First Name', 'Last Name', 'DOB', 'SSN', 'Date of Birth', 'Address 1', 'Address 2', and 'City/State'.
- Top Right:** A 'Have Questions or Need Help?' section with a 'Call us at 1-800-333-3333' button and a 'Call your representative' link.
- Bottom Left:** A 'License & Permit / Misc. Bond Request' form with a progress bar and a 'Confirm Your Bond Selection' section.
- Bottom Center:** A 'How To Select Your Bond Form' section with a table of bond types and amounts.
- Bottom Right:** A 'Have Questions or Need Help?' section with a 'Call your representative' link and a 'License & Permit / Misc. Bond Request' section.

The website features a blue header with the JVI Surety Bonds logo and navigation links. The application process is guided by progress bars and clear call-to-action buttons.

User research

Persona

Problem statment

Mike, a customer who needs to secure his business, requires a straightforward and user-friendly application to easily purchase coverage.



Name

Mike

Language

English

General Education

Degree/ Higher education

Domain Expertise

High

General Computer Experience

High

Goals

> Goal is to maximise application completion conversion %

Needs

> Add commercial insurance line coverage requests.
> Increase application completion conversion rate

Pain points

>Managing the sales pipeline using the SC inbox is cumbersome and does not incorporate any automation.

Technical

Aware of excel, word, PPT, etc

User research

Expert review

1. Navigation is unclear: Users are unsure of their current location and how to proceed.
2. Excessive visual cues create confusion.
3. Difficulty returning to the previous screen.
4. Poor color contrast affecting readability.
5. Multiple action items are cluttered on a single page.
6. The bonds table is cluttered, making search and selection challenging.
7. Incorrect placement of action items.

How To Select Your Bond Form

- Select the bond form from the list below if it exists in the library.
- If the bond form does not exist, click the button below the list labeled "MY BOND FORM IS NOT IN THE LIST".

Country of Bond: ✓

Location of Bond Requirement: ✓

Find the bond you need:

Enter bond name here...

Surety Bond	Required By	Version	Amount	Get Bonds
Agent's Bond (Individual)	Commission on Proprietary Schools and College Registration	CPSCA Form 3 (2019)	10,000	Select Bond
Apprenticeship Bond (SEW 666)	International Brotherhood of Electrical Workers			Select Bond
Appraisal Management Company Bond	Department of Professional and Occupational Regulation	(2/1/15)	100,000	Select Bond
Attorney Settlement Agent Bond	Bureau of Insurance		200,000	Select Bond
Auctioneer Bond (DPOR)	Department of Professional and Occupational Regulation	2905_07BO ND (4/16/10)	10,000	Select Bond

Have Questions or Need Help?

Call your representative:

Agency: JW Bond Consultants, Inc.
Main Line: (888) 592-6631

License to Submit Bonds:

Agency Rep: [Call Me Please](#)
Direct: (267) 355-1111

Instructions:

- Choosing the correct bond form is imperative.
- Selecting an incorrect form will require your bond to be re-quoted.

Can't find your bond form?

It's possible that we don't have your bond form in our library yet. If you cannot find your form, use the orange button below.

[MY BOND FORM IS NOT IN THE LIST](#)

Design

Digital wireframes

Design solutions

Visual designs

Testing with users

Design - Wire frames

The 'Select Bond' and 'Select Industry' page is a key area that has many UX and UI issues, as discussed in the problem statement.

Version 1

Based on initial discussions, this is a separate page. Clearly provides a search function and video help for first-time users. It includes a list of bonds with properly labeled buttons, such as 'Select Bond' and 'View Bond Form.'



Jim Doe
Your personal Adviser

Chat with me

Call me

(123) 543 7896

Mail me

jimdoe@company.com

Need Help

License & Permit / Misc

License & Permit / Misc

Location of Bond

Select your bond form in the below list

If you can't find your form in the below list,
[Click Here](#)

Search your Bond Name Here

First Previous 1 2 3 4 5 Next Last

Show 5 Entries

Surety Bond	Required by	Version	Amount	Get Bonds
Agent's Bond	Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form Select Bond
Agent's Bond	Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form Select Bond
Agent's Bond	Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form Select Bond
Agent's Bond	Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form Select Bond
Agent's Bond	Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form Select Bond

Bond Amount

+

Additional Coverages

+

Supportive Documents

+

Version 2

Later, the flow was divided into three steps: Registration Flow, Bond Flow, and Exit Flow. Based on this structure, tabs were added in this section.

Jim Doe
Your personal Adviser

Call me
(123) 543 7896

Mail me
jimdoe@company.com

Chat with me

Business Registration

License & Permit / Misc

Bonding Profile

License & Permit / Misc

Select your bond form in the below list

If you can't find your form in the below list,
[Click Here](#)

Search Your Bond Name Here

Surety Bond	Required by	Version	Amount	Get Bonds ▾
Agent's Bond	Alabama Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form <button>Select Bond</button>
Agent's Bond	Alabama Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form <button>Select Bond</button>
Agent's Bond	Alabama Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form <button>Select Bond</button>
Agent's Bond	Alabama Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form <button>Select Bond</button>
Agent's Bond	Alabama Commission on Proprietary Schools and College Registration	CPSCR Form3	10,000	View Bond Form <button>Select Bond</button>

Show Entries

First Previous **1** 2 3 4 5 Next Last

Bond Amount +

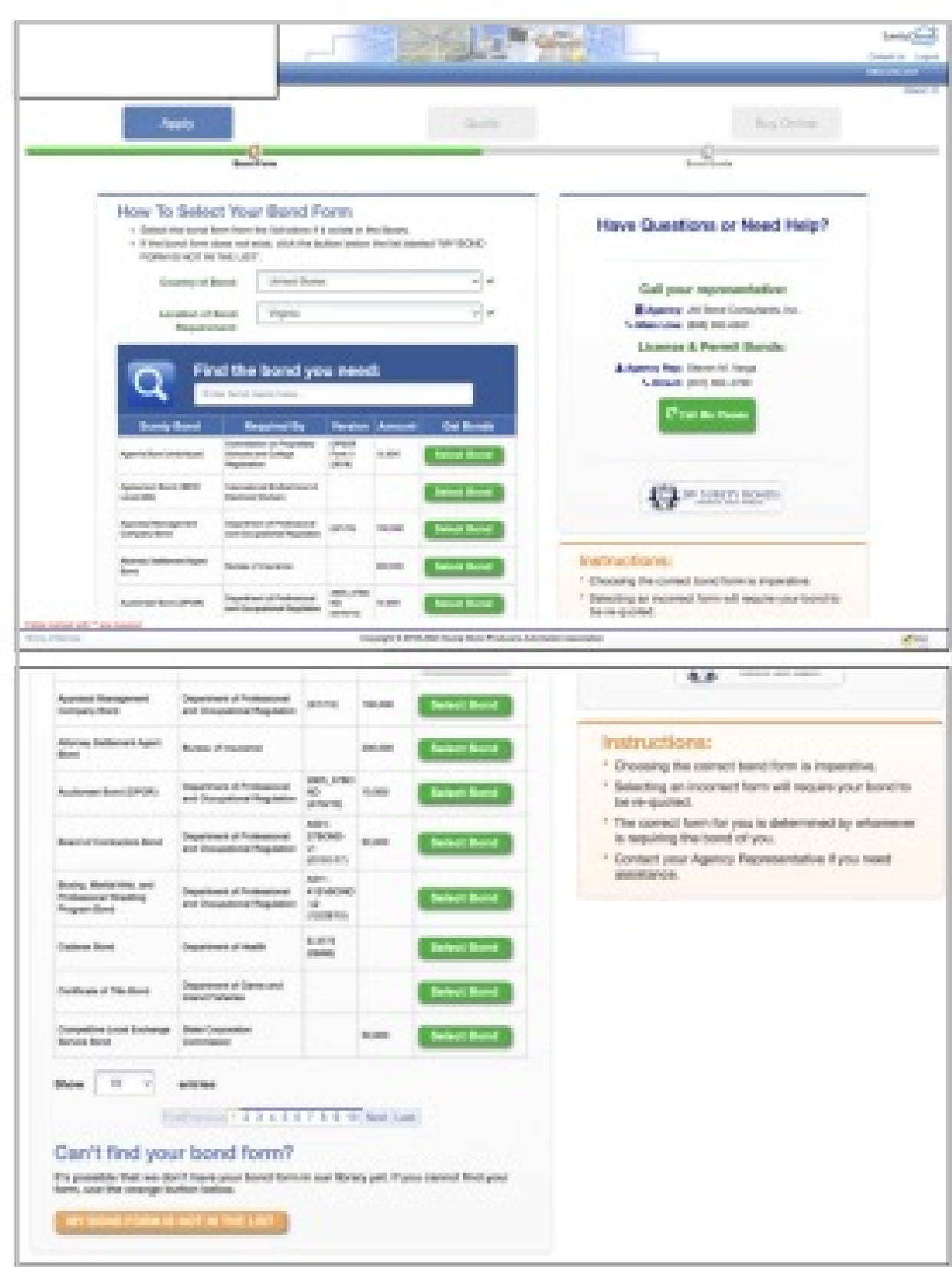
The 'Select Bond/Industry' page is a key component of this flow.

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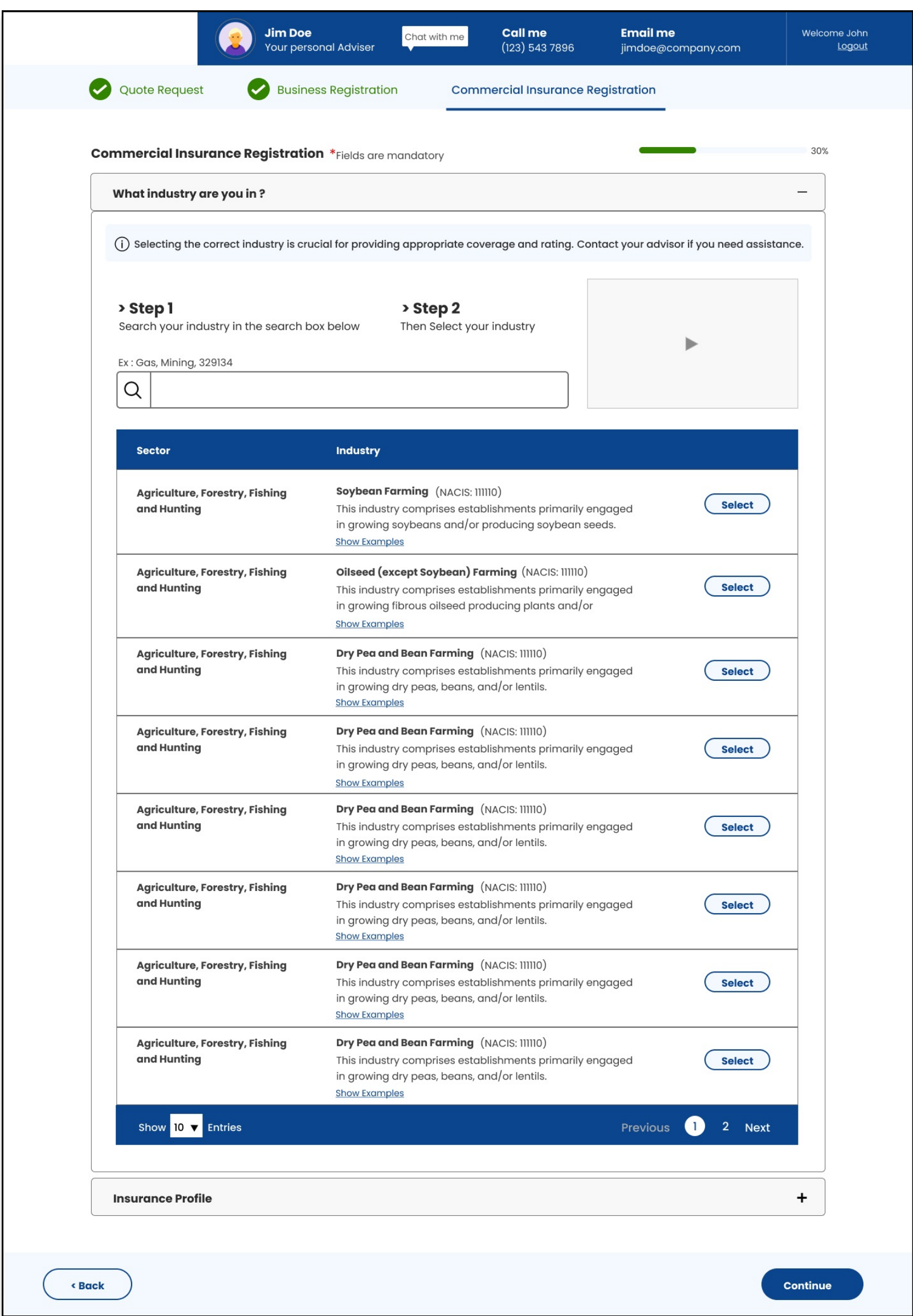
↓
Scroll down

Final Design

Before



After



↓
Scroll down

Simple, clean and easily selecting the bond/Industry

- The agent help feature is now fixed and always visible in the top bar.
- Process steps are clearly differentiated.
- A status bar has been added to help users easily understand the completion time.
- Steps for industry/bond selection are clearly outlined to guide the user.
- A video tutorial is provided on how to select a bond or industry from the list.
- Clutter has been removed from the entire industry/ bond selection page.
- Pagination and clear action items for next steps have been added.

Design Guidelines

Clearly defined all the visual styles, delivered to development team

Colors

PRIMARY COLOURS

#0A458E

#2B2B2B

SECONDARY COLOURS

#F4F9FF

#F8F8F8

TEXT COLOURS

#2B2B2B

#3C3C3C

#707070

#FFFFFF

OTHER COLOURS

#338401

#F4FFED

#B75928

#FFF7F4

#AF3030

Typography

Poppins

Body, Input labels, form fields
16px Regular/Medium/semibold
Based on context/priority

Headings/subheading
20px/18px Regular/Medium/semibold/bold
Based on context/priority

FORM elements look and feel

Textbox, Dropdown, Radio, Checkbox & Text area

Label Name

Label Name

Label Name

▼

Label

Label

✓

Label

Label

Reminder

Buttons

Primary Action Button

Label name

Secondary Action Button

Label name

Tertiary Action Button

Label name

Other styles
Based on context/priority we used other styles.

Search Client's Tasks

View & Edit

Tabs

Jim Doe

Your personal Adviser

Chat with me

Call me

(123) 543 7896

Email me

jimdoe@company

Guide me by asking questions

I want to select coverages

✓

Quote Request

✓

Business Registration

Commercial Insurance Registration

All (28)

Commercial Insurance (19)

Fidelity Bonds (3)

Surety Bonds (6)

Client Profile

Quotes

Policies

Questionnaires

Attachments

Account Notes

Discussions

Request

Market Placement

Underwriting

Issuance

Delivery

Policy Management

Dashboard

Opportunities

Tasks

Accounts

Sub-Brokers

Settings

My Tasks

Unassigned

All (24)

Due Date(10)

Status (14)

Incomplete(4)

Pending Approval(4)

Approved(4)

Terms Sent(1)

Binding(1)

Takeaways

Impact

- 40% Reduced time.
- 60% increased efficiency.
- 100% Client satisfaction.

Learnings

- Resolving responsive design (RWD) issues.
- Improving form usability.
- Enhancing accessibility.



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Client says -

Linkedin comments



Mike Weisbrot - Founder & CEO of Policybound

Chandu is a master at creating intuitive and beautiful U/X designs. He can take complex functionality requirements and turn them into a design that needs little to no instruction for the user. It's an honor to work with such a skilled professional!



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Brief about my journey in this project

When I began this project, it felt like a blank slate. To be honest, I didn't know where or how to start. I took a moment to calm myself and approached the situation with empathy, which I believe is a crucial step in any project.

Given that this was my first time working in the insurance domain and on such a large project, I began by familiarizing myself with essential terms like 'policy' and 'bonds' from the provided documents. This initial step helped me build a foundational understanding and gain confidence in the project.



Thank you for your
patience in reviewing
this case study.

-Chandu Majeti