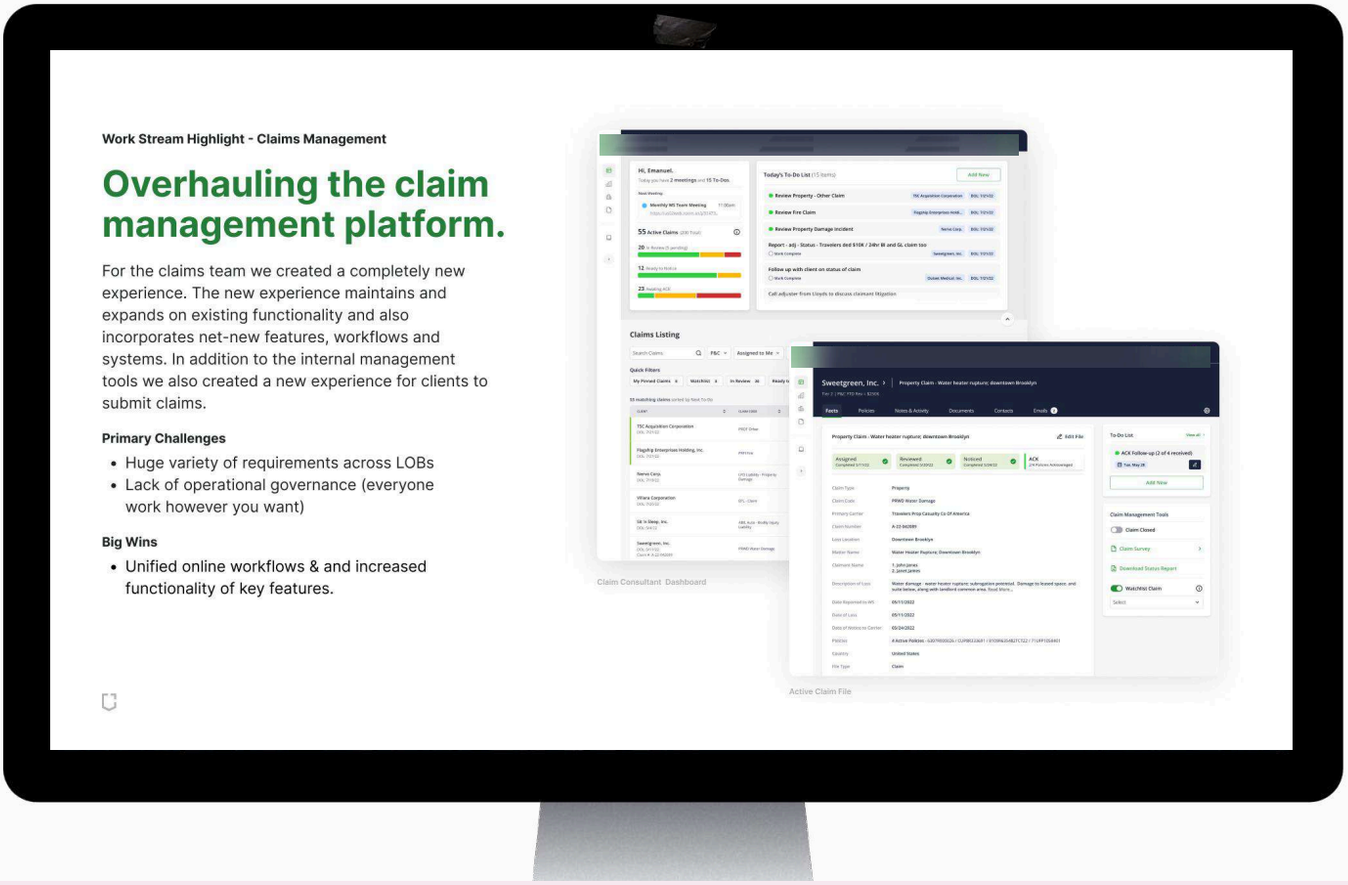
Case Study
Claim Management System



Product Overview

Claims Management System includes details on how the system handles various types of claims, such as property & causality claims, management & liability claims and worker compensation claims. It includes different workflows, automation capabilities, integration with other system, reporting tools and client support. Additionally it highlights the benefits of using the claims product, such as improved efficiency, reduced processing times, increased accuracy and enhanced customer satisfaction.

Responsibility

- Design Strategist
- User Research
- Design
- Validate

Tools

- Figma
- Miro
- Adobe Acrobat
- Microsoft Excel

Problem Statement

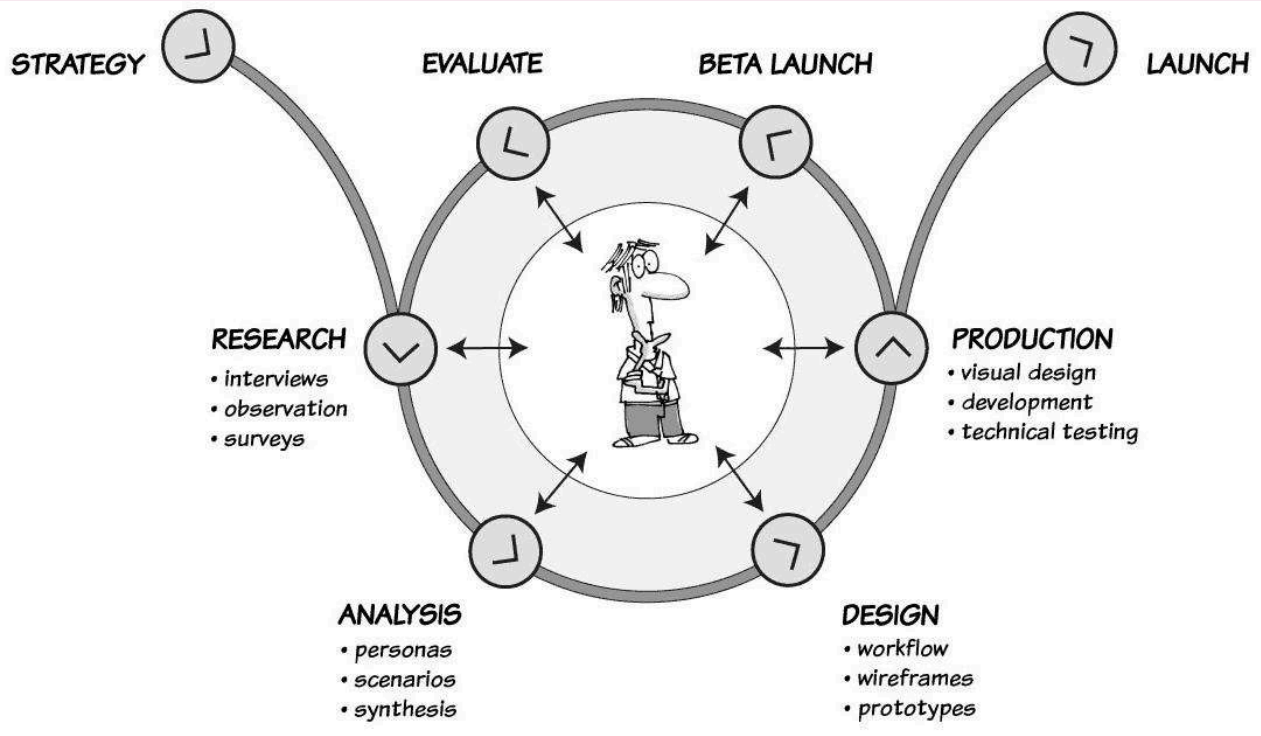
There was need of revamping the existing application due to lack of efficiency, productivity and outdated interface. It was noticed that existing claims management system was outdated and inefficient, leading to bottlenecks, errors, and dissatisfaction among the users. The system lacks modern features, automation capabilities, and scalability., hindering the ability to process the claims effectively and meet the evolving needs of our users and stakeholders.

Goals

- Enhanced User Experience
- Meeting Business Expectations
- Improved Efficiency
- Competitive Advantage
- Scalability & Flexibility
- Integration

Design Process

A UX design process is an iterative, step-by-step methodology UX design teams use to complete projects. While specific methods and steps can vary between projects and organizations, a typical UX design process often includes applying various research methods, defining project scope, using prototyping tools to create a solution and iterate on it until UX teams perfect it for real world scenarios.



Design Strategy

As we were revamping the existing system hence we had the data with us also had an opportunity to reach out to different user segment who were our potential users.

Executive Intent	In order to craft a plan for how to get somewhere, you first have to know where you're going and why. Our primary goal is to redefine the existing system and create completely new experience with addition to includes net new features, workflows and systems.
Market Segment	Internal Employees who are using claims management system.
General Tasks	Claims Listing, Claim Creation, Claim Overview, Document Management, Contact Management, Outlook Integration, Workflow & Tasks Management
Technology (or other) Constraints	Integration with Existing system, Outlook
Goals	Enhanced User Experience, Improved Efficiency, Scalability & Flexibility, Integration
Critical Success Factors	To provide unified seamless claims management experience across different teams.

User Profile

User profiling done at the initial level to understand the users and their roles within claims team.

Characteristic	Co-ordinator	Consultant	Coverage Manager	Service Team
Language	English	English	English	English
General Education	Graduate	Post Graduate	Post Graduate	Graduate
Domain Expertise	Insurance	Insurance	Insurance	Insurance
General Computer Experience	Proficient	Expert	Expert	Competence
Age/Gender	24-60/Male-Female	30-55/Male-Female	30-60/Male-Female	24-40/Male-Female
Expectations	Able to create claim, send notices and perform other claims related activities like upload document, see insurer data, analytics etc	Primary expectations is to complete review, send acknowledgement, create claim, generate claim reports, add policies, insurers contacts, document and other common claim features	To Review Complex Claims, Create claim when required also have the access of all coverage issues related to claims.	View assigned claim and check status of the claim file.

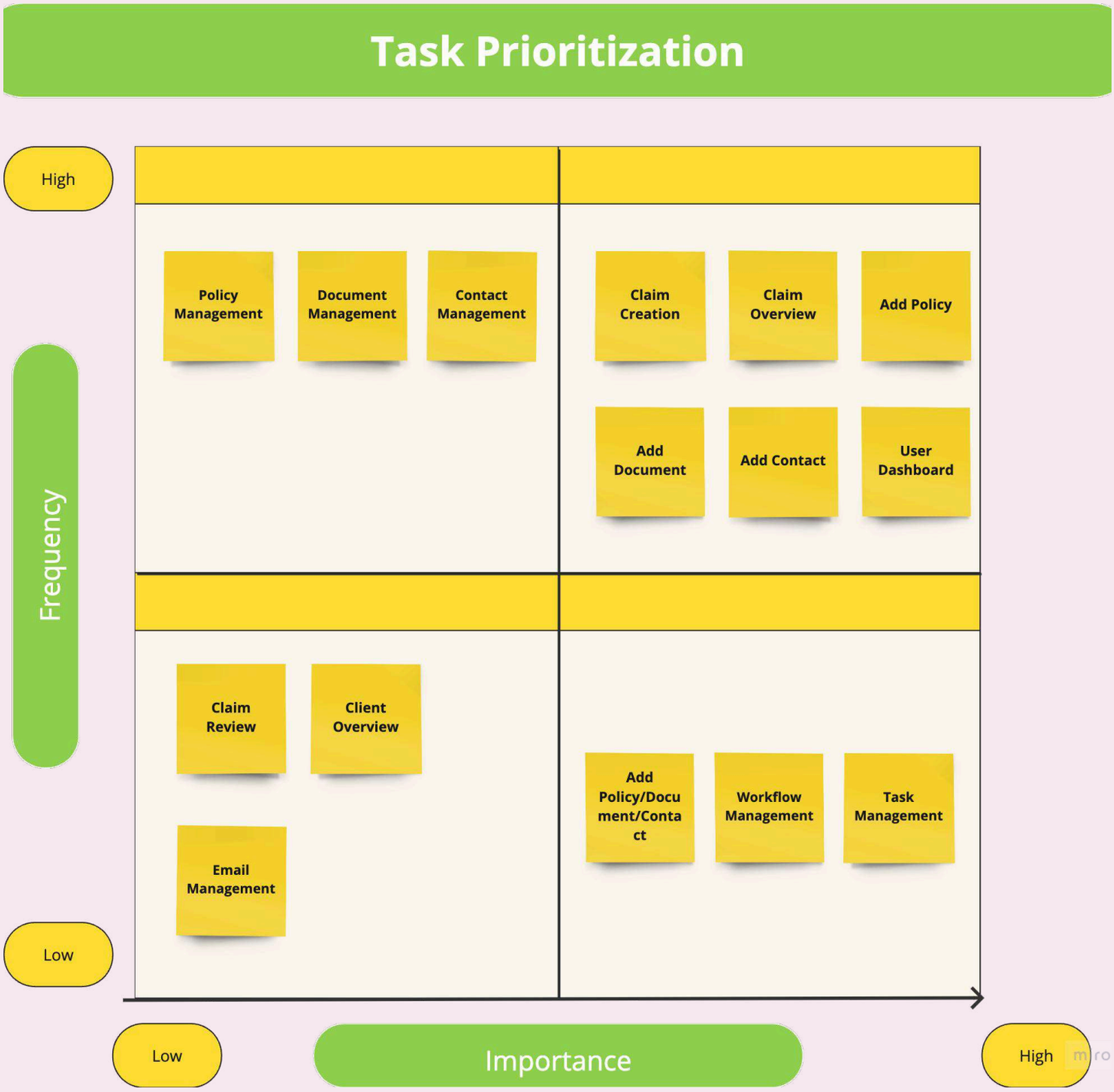
Task Profile

Based on users we have differentiated with types of tasks user does as per their roles

Tasks	Co-ordinator	Consultant	Coverage Manager	Service Team
Claim Creation	Yes	Yes	Yes	No
Claim Overview	Yes	Yes	Yes	Yes
Review Claims	No	No	Yes	No
Add Policies	Yes	Yes	Yes	No
Add Contacts	Yes	Yes	Yes	No

Add Document	Yes	Yes	Yes	No
Task Management	No	Yes	Yes	No
Shared Email Inbox	Yes	No	No	No
Client Access	Yes	Yes	Yes	No

Prioritize The Tasks



User Persona - Created Before User Interview

Demographics	Name: **Jack Ray** Gender: **Male** Age: **37** From Location: **New York** Lives In: **New York** Marital Status: **Married**	Income Range: **$60K** Education: **Post Graduate** Occupation: **Claim Consultant** Years of Working: **12** Language Spoken: **U.S. English**	
Situation	As a claim consultant, Jack is tasked with navigating and managing complex claims management system on behalf of clients or within organization.		
Quote	It doesn't matter how much you want. What really matters is how much you want it. The extent and complexity of the problem does not matter was much as does the willingness to solve it.		
Things user wants to know	How we can reduce the complexity in claims workflow? Is there any possibilities to have an integrated solution? Is there any way to search for claims of different consultants/LOBs? How to add custom policies within claims? Is there any way to show up the holistic view of the clients?		
Things user wants to do	Simplify Processes, Improve user interface, Implement Automation.		
Psychographics Core Values	Professionalism, Problem-Solving, Empathy, Client-Centricity, Team Collaboration, Continuous Learning, Result Oriented		

User Persona

Demographics	Name: **Sammie Roslyn** Gender: **Female** Age: **32** From Location: **Texas** Lives In: **San Francisco** Marital Status: **Un-Married**	Income Range: **$40K** Education: **Graduate** Occupation: **Claim Co-ordinator** Years of Working: **6** Language Spoken: **U.S. English**	
Situation	She involves in managing a diverse range of claims, conducting through assessments and investigations, communicating effectively with stakeholders to ensure efficient and effective claim handling.		
Quote	"You can do two things at once, but you can't focus effectively on two things at once." - Gary Keller.		
Things user wants to know	How to get customization and flexibility? Feasibility to integrate with external data? Real time updates? How seamless experience would be?		
Things user wants to do	Expect a streamlined process that allows them to quickly and efficiently navigate through the system to submit and process claim. Possibility of Comprehensive data gathering.		
Psychographics Core Values	Responsibility, Empathy, Trustworthiness, Problem-Solving, Customer-Centricity, Resilience		

User Interview

User Interview

Welcome to the User Interview!

Opening (Ice breakers):

- How are you doing?
- What's your typical day like?
- How has your day been like today?

Warm-up Questions (1-2 mins):

- What is your roles and responsibilities within this team?
- How long you have been working as a claim consultant?
- Have you ever used some other tools/system in your previous organizations?

Note: We are doing a research on re-designing of claims management system and would like to have your inputs and feedback on your ongoing experience with current claims management tool.

Main Questions (5-6 mins):

- Can you share your experiences with the current claims system?
- How do you think the current claims system could be improved?
- In your opinion, what are the most critical features or functionalities that is missing?
- Have you encountered any specific pain points or inefficiencies in the current system that you believe could be addressed through redesign?
- Are there any industry trends or emerging technologies that you believe could be leveraged to improve the experience?

User Interview - Data Gathering

July 17, 2023, Jack Ray

Jack has background in insurance domain.

User persona (Jack Ray is a Claim Consultant)

Questions	Answers
Can you share your experiences with the current claims system?	Current experience is not so great as many things are fallen in different places which is hard to get into and find the proper process to submit or tack claim file.
How do you think the current claims system could be improved?	By enhancing the user experience, workflows, having integrated solutions.
In your opinion, what are the most critical features or functionalities that is missing?	Ability to track the claim file, See the insurer contacts, Email integration, Client visibility.
Have you encountered any specific pain points or inefficiencies in the current system that you believe could be addressed through redesign?	Ineffective search functionality, Manual effort in managing insurer contacts, Collaboration, Automation capabilities

Pain Points

User Persona - Post User Interview

Demographics	Name: **Jack Ray** Gender: **Male** Age: **42** From Location: **New York** Lives In: **New York** Marital Status: **Married**	Income Range: **$60K** Education: **Graduate** Occupation: **Claim Consultant/Claims Coverage Manager** Years of Working: **12** Language Spoken: **U.S. English**	
Situation	As a claim consultant, Jack is tasked with navigating and managing complex claims management system on behalf of clients or within organization. Along with this Jack is also responsible to review the complex claims of other consultant.		
Quote	It doesn't matter how much you want. What really matters is how much you want it. The extent and complexity of the problem does not matter was much as does the willingness to solve it.		
Things user wants to know	How we can reduce the complexity in claims workflow? Is there any possibilities to have an integrated solution? Is there any way to communicate with consultant via application? How to add custom policies within claims? How to add contacts for different insurers?		
Things user wants to do	Simplify Processes, Improve user interface, Implement Automation.		
Psychographics Core Values	Professionalism, Problem-Solving, Empathy, Client-Centricity, Team Collaboration, Continuous Learning, Result Oriented		

User Scenario

Scenario 1 - Jack Ray	The claim consultant needs to review the status of specific claim and gather relevant information for an update meeting with a policyholder. However, the system's convoluted navigation makes it challenging to locate the claim within the interface. Despite several attempts, the claim consultant struggles to find the necessary information, wasting valuable time and causing frustration.
Scenario 2 - Sammie Roslyn	Sammie, a first notice of loss (FNOL) user is tasked with creating a claim file for a new incident reported by a policyholder. As Sammie filled up all required data which is needed to log a claim file after facing systems usability issues she has noticed that there is no way to get the status of the claims processing. For noticing the claim she needs to get in touch with the consultant and ask them to process the claim so she can update back to policyholder on time.

Competitive and SWOT Analysis

	Paradigm	ABD	Vita	Your company
Product overview	Employee Benefit Service, Property and Causality	Insurance Brokerage	Employee Benefits and Personal Financial Planning	Management Liability, Personal Financial Planning, Employee Benefits
Positioning/ Category	Insurance Broke	Insurance Broker	Insurance Broker	Insurance Broker
Pricing	High	Low-Medium	Medium	Medium - High
Core feature comparison				
Claims Submission	✓	✓	✓	✓
Integrated Solution	✓	✗	✗	✓
Workflow Management	✗	✗	✗	✓
Client Management	✓	✗	✗	✓
Insurer Management	✗	✗	✗	✓

Strengths	Opportunities
• Integrated EPIC System • Legacy Claims Data • Client and Insurer Data	• Streamline the Contact • Streamline Workflows • Integrated Solution with Outlook • Streamline Worker Compensation • Increased Functionalities of key features
Weaknesses	**Threats**

- Too many complex flows in the existing system
- Huge variety of requirement across LOB's
- Lack of Operational Governance

- Technical Constraints on implementation of design requirements
- Setting up rules to make workflow functional
- Unified Contact Database

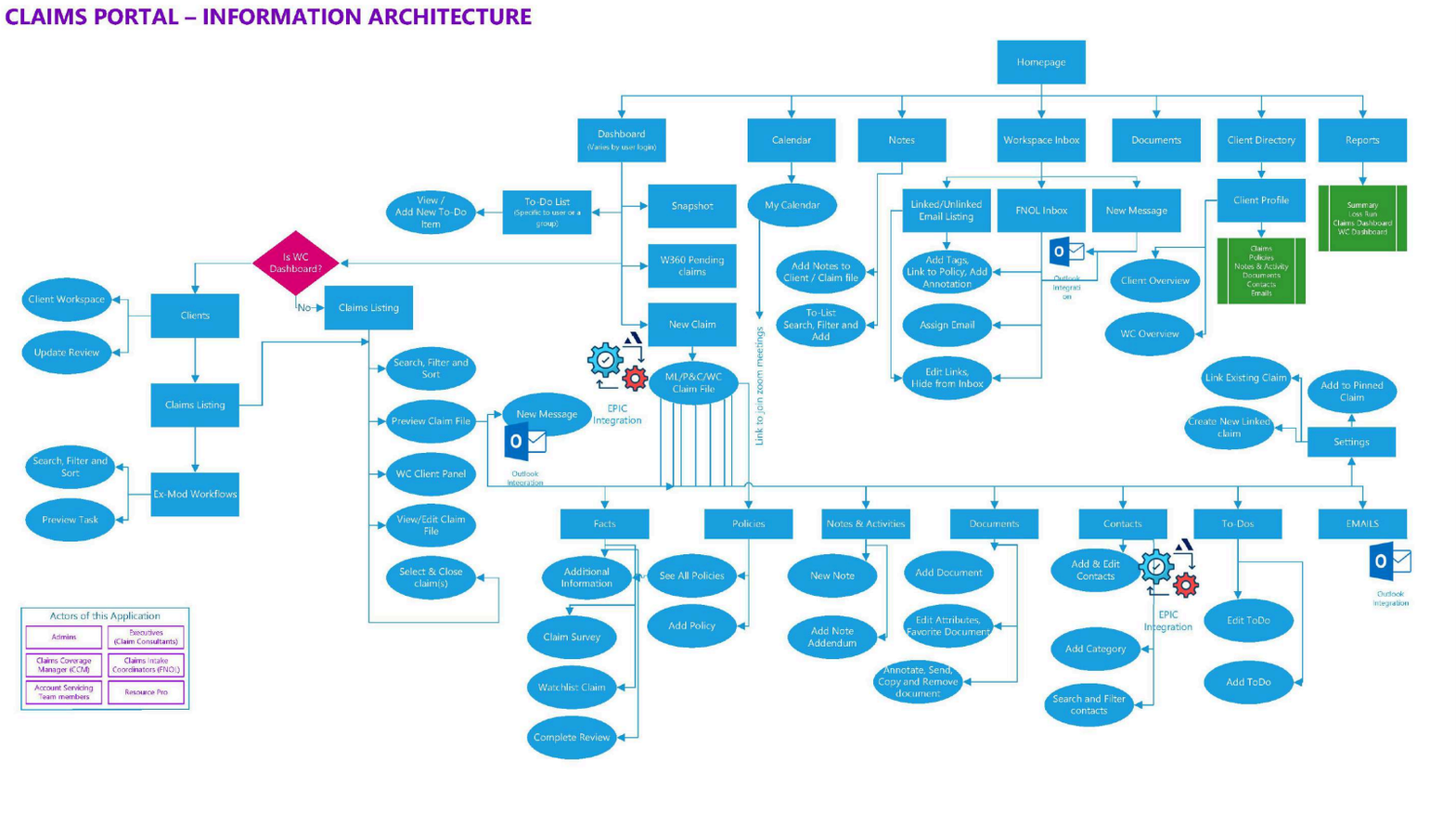
Unique Features

- Integrated Solution
- Insurer Page & Contacts
- Client Prioritization
- Workflow & Tasks Implementation

Method Used to get insights of Existing System

- Remote Testing method to analysis the user completing set of tasks.
- Card Sorting allows users to group and sort a site's information into a logical structure that will typically drive navigation and the site's information architecture.
- Task Analysis
- Heuristic Evaluation on Existing system to work on common missed experiences.

Information Architecture/User Flow



Claim Experience - Existing vs New System

Existing System - Claims Dashboard

Home | Reports | Forms | Claims Wiki | Alec Hogstad

INVITE AND MANAGE USERS | REPORT MODE | PENDING CLAIMS(21) | ADD CLAIM

Search

Claim Year: 2022 | WS Practice: ALL | Claim Intake Status: Open | CCM Review Status: ALL | File Assigned To: Please Select

Display Auto Claims | CLAIMS DASHBOARD REPORT | RESET | SEARCH

* Temporary Claim File — Ready | Due | Late | Done

Client Name	Claimant / Matter	Claim Code	WS Consultant	DOL	Complex	Date Created	File Assigned	CCM Review	Noticed	ACK	Claims Intake Notes
Amazon.com, Inc.		EOCI EO - Circumstance	Shankar Narayanan	03/01/2022	N	03/16/2022	3/16/2022		Click for notes		
The Container Store Group, Inc.	Marcus North	DOSC DO - Claim--- Securities Claim	Daniel Mahar	03/14/2022	Y	03/14/2022	3/15/2022	3/15/2022	Click for notes		1
Amazon.com, Inc.	Balasubramani	DOCI DO - Circumstance	Daniel Mahar	01/12/2022	N	03/07/2022	3/7/2022		Click for notes		
Coherent, Inc.		LPD Liability - Property Damage	Shankar Narayanan	03/01/2022	N	03/01/2022	3/1/2022		Click for notes		
The ADCO Group		FIDCI Fiduciary - Circumstance	Jesse Attix	03/01/2022	N	03/01/2022	3/1/2022		Click for notes		
SanDisk Corporation		CRCL Crime - Claim	Jesse Attix	03/01/2022	N	03/01/2022	3/1/2022		Click for notes		
Anvil Builders Inc.		EPLCI EPL - Circumstance	Daniel Mahar	03/01/2022	N	02/28/2022	3/10/2022		Click for notes		
Villara Corporation		CRCL Crime - Claim	Daniel Mahar	02/28/2022	N	02/28/2022	2/28/2022		2/28/2022		
SanDisk Corporation		DOCI DO - Circumstance	Daniel Mahar	02/16/2022	N	02/23/2022	2/23/2022		Click for notes		
SanDisk Corporation		EPLCI EPL - Circumstance	Daniel Mahar	02/15/2022	N	02/22/2022	2/22/2022		Click for notes		
Villara Corporation	James Martin	CRCL Crime - Claim	Daniel Mahar	02/22/2022	N	02/22/2022	2/25/2022		Click for notes		

New System - Claims Dashboard

EE

Hi, Emanuel.

Today you have **2 meetings** and **15 Tasks**.

Next Meeting:

Monthly WS Team Meeting 11:00am
https://us02web.zoom.us/j/31473..

55 Active Claims (200 Total)

20 In Review (7 not ready to notice)

12 Ready to Notice

23 Awating ACK

Today's Tasks (16) — Add New

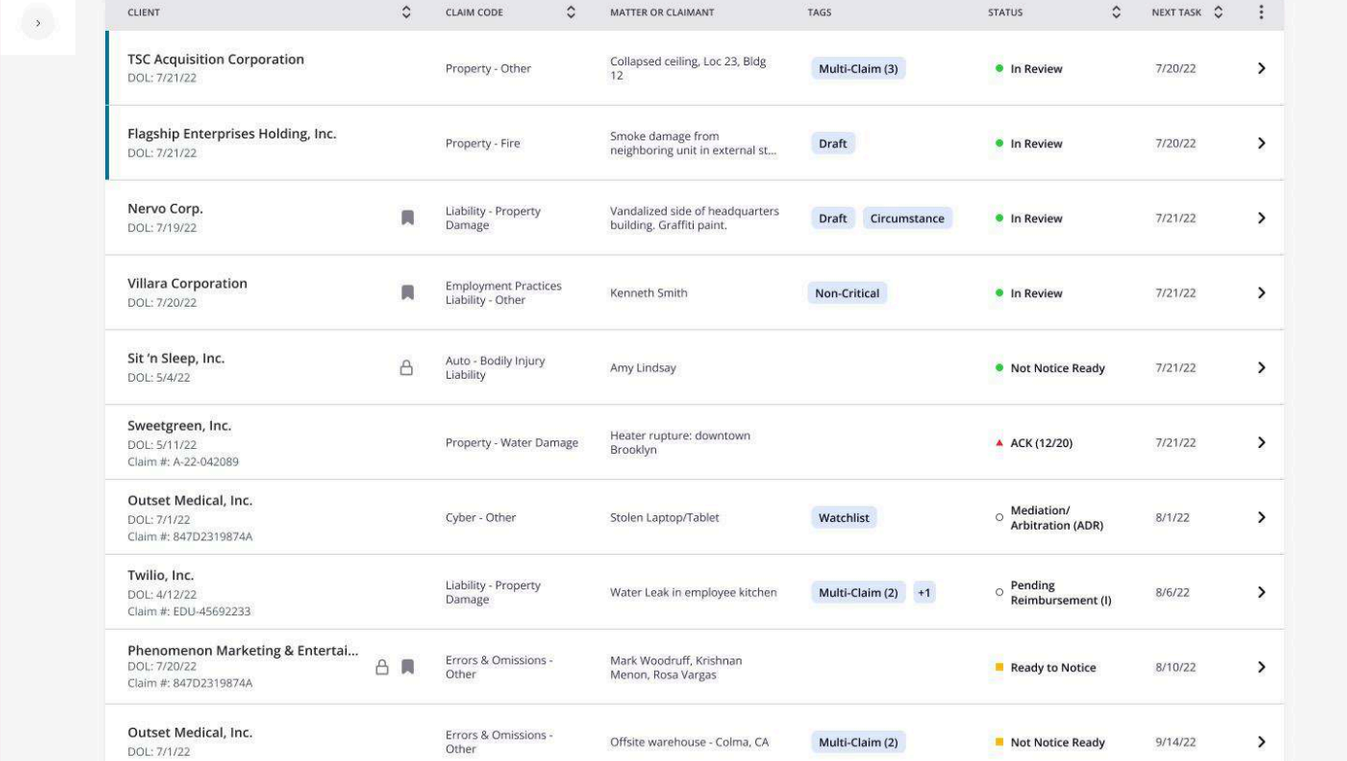
- Review Property - Other Claim — 7/29/22 • Off Track — TSC Acquisition Corporation — DOL: 7/21/22
- Review Fire Claim — 7/29/22 — Flagship Enterprises Holding — DOL: 7/21/22
- Review Property Damage Incident — 7/29/22 — Nervo Corp. — DOL: 7/20/22
- Report - adj - Status - Travelers ded $10K / 24hr... — 7/29/22 — Sweetgreen, Inc. — DOL: 6/30/22
- Follow up with client on status of claim — 7/29/22 — Outset Medical, Inc. — DOL: 6/25/22

Claims Listing — New Claim +

Search Claims | My Claims | FNOL | Client | DOL | Status | Code | LOB | Tag

Bookmarked 3 | Watchlist 5 | In Review 20 | Not Notice Ready 7 | Ready to Notice 12 | Awaiting ACK 23

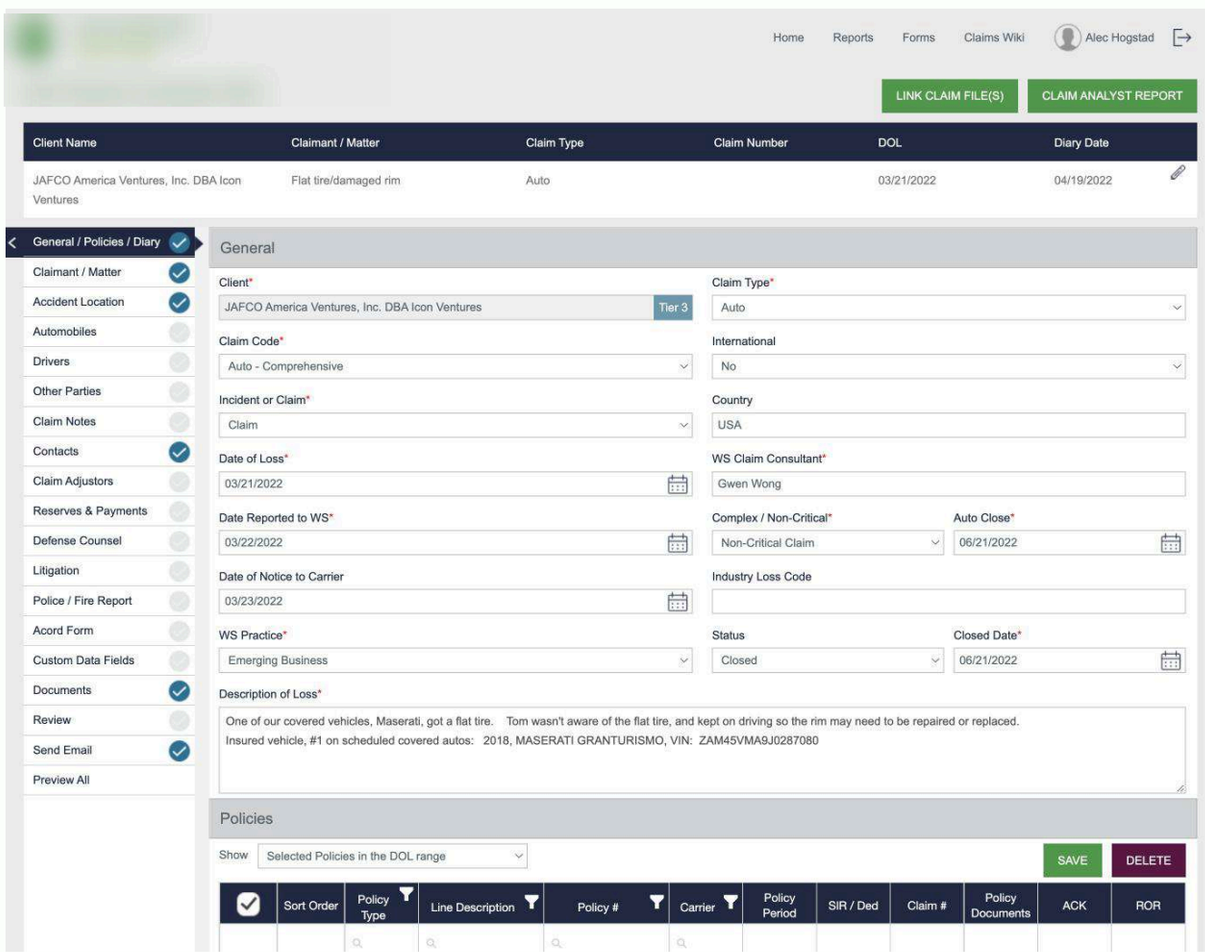
55 matching claims — Refresh Data



CLIENT	CLAIM CODE	MATTER OR CLAIMANT	TAGS	STATUS	NEXT TASK
TSC Acquisition Corporation DOL: 7/21/22	Property - Other	Collapsed ceiling, Loc 23, Bldg 12	Multi-Claim (3)	In Review	7/20/22
Flagship Enterprises Holding, Inc. DOL: 7/21/22	Property - Fire	Smoke damage from neighboring unit in external st...	Draft	In Review	7/20/22
Nervo Corp. DOL: 7/19/22	Liability - Property Damage	Vandalized side of headquarters building. Graffiti paint.	Draft, Circumstance	In Review	7/21/22
Villara Corporation DOL: 7/20/22	Employment Practices Liability - Other	Kenneth Smith	Non-Critical	In Review	7/21/22
Sit 'n Sleep, Inc. DOL: 5/4/22	Auto - Bodily Injury Liability	Amy Lindsay		Not Notice Ready	7/21/22
Sweetgreen, Inc. DOL: 5/11/22 Claim #: A-22-042089	Property - Water Damage	Heater rupture: downtown Brooklyn		ACK (12/20)	7/21/22
Outset Medical, Inc. DOL: 7/1/22 Claim #: 847D2319874A	Cyber - Other	Stolen Laptop/Tablet	Watchlist	Mediation/ Arbitration (ADR)	8/1/22
Twilio, Inc. DOL: 4/12/22 Claim #: EDU-45692233	Liability - Property Damage	Water Leak in employee kitchen	Multi-Claim (2) +1	Pending Reimbursement (I)	8/6/22
Phenomenon Marketing & Entertai... DOL: 7/20/22 Claim #: 847D2319874A	Errors & Omissions - Other	Mark Woodruff, Krishnan Menon, Rosa Vargas		Ready to Notice	8/10/22
Outset Medical, Inc. DOL: 7/1/22	Errors & Omissions - Other	Offsite warehouse - Colma, CA	Multi-Claim (2)	Not Notice Ready	9/14/22

Claim Experience - Existing vs New System

Existing System - Claims Internal Screen



New System - Claims Internal Screen

Property - Water Damage: heater rupture; downtown Brooklyn

Facts | Policies | Notes & Activity | Documents | Contacts | Emails 2

Property - Water Damage: heater rupture; downtown Brooklyn Draft

Edit Section

Assigned 5/11/22 | In Review | Notice | ACK

Claim Type	Property
Claim Code	Water Damage
Primary Insurer	---
Claim Number	---
Loss Location	Downtown Brooklyn
Matter Name	Heater Rupture; Downtown Brooklyn
Claimant Name	1. John Jones 2. Janet James
Description of Loss	Water damage - Heater rupture; subrogation potential. Damage to leased space. and suite below, along with landlord common area. Read More...
Date Reported to WS	05/11/22
Date of Loss	Required for Notice
Date of Notice to Insurer	---
Policies	---
Policy Period	---
Country	United States
File Type	Claim
File Classification	Standard
Source	Email - Client
WS Practice	P&C
Intake Coordinator	Susan Smith
Consultant	Emanuel Enes
CCM Review	---

Additional Information — Add Information

Matter — Details

Claimant — Details

Loss Location — Details

Claim Tasks

Review Property - Water Damage 5/12/22 EE

Review Property - Water Damage 5/12/22 CF

Add New

Claim Management Tools

Complete Review

Claim Survey

Download Analyst Report

New Coverage Issue

Claim Closed

Watchlist Claim

Claim Experience - Existing vs New System

Existing System - Document Management

Home | Reports | Forms | Claims Wiki | Alec Hogstad

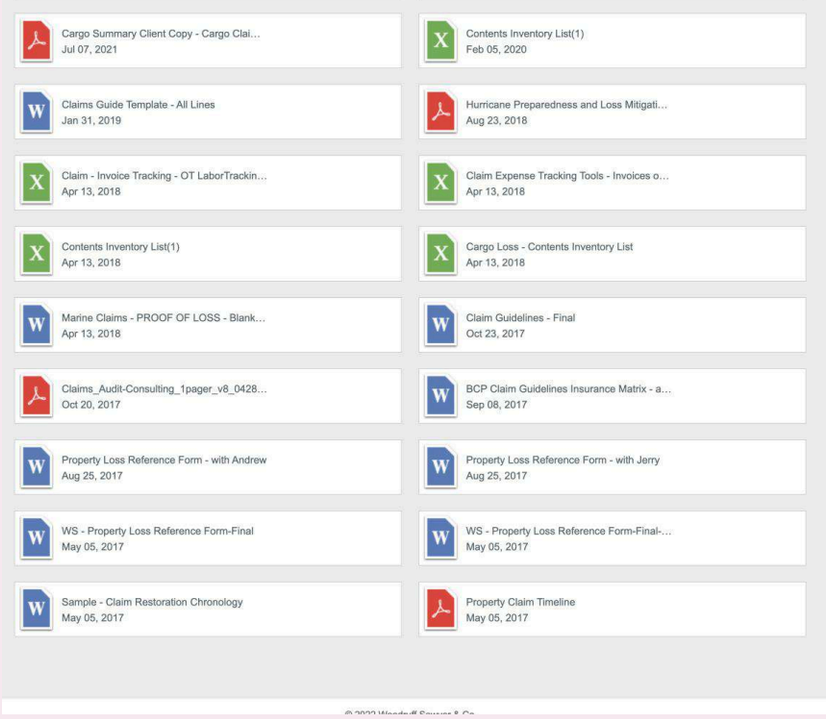
Forms — SORT BY | SEND EMAIL

Emanuel-Shelley-Prop and Cargo Claims -... Mar 11, 2022

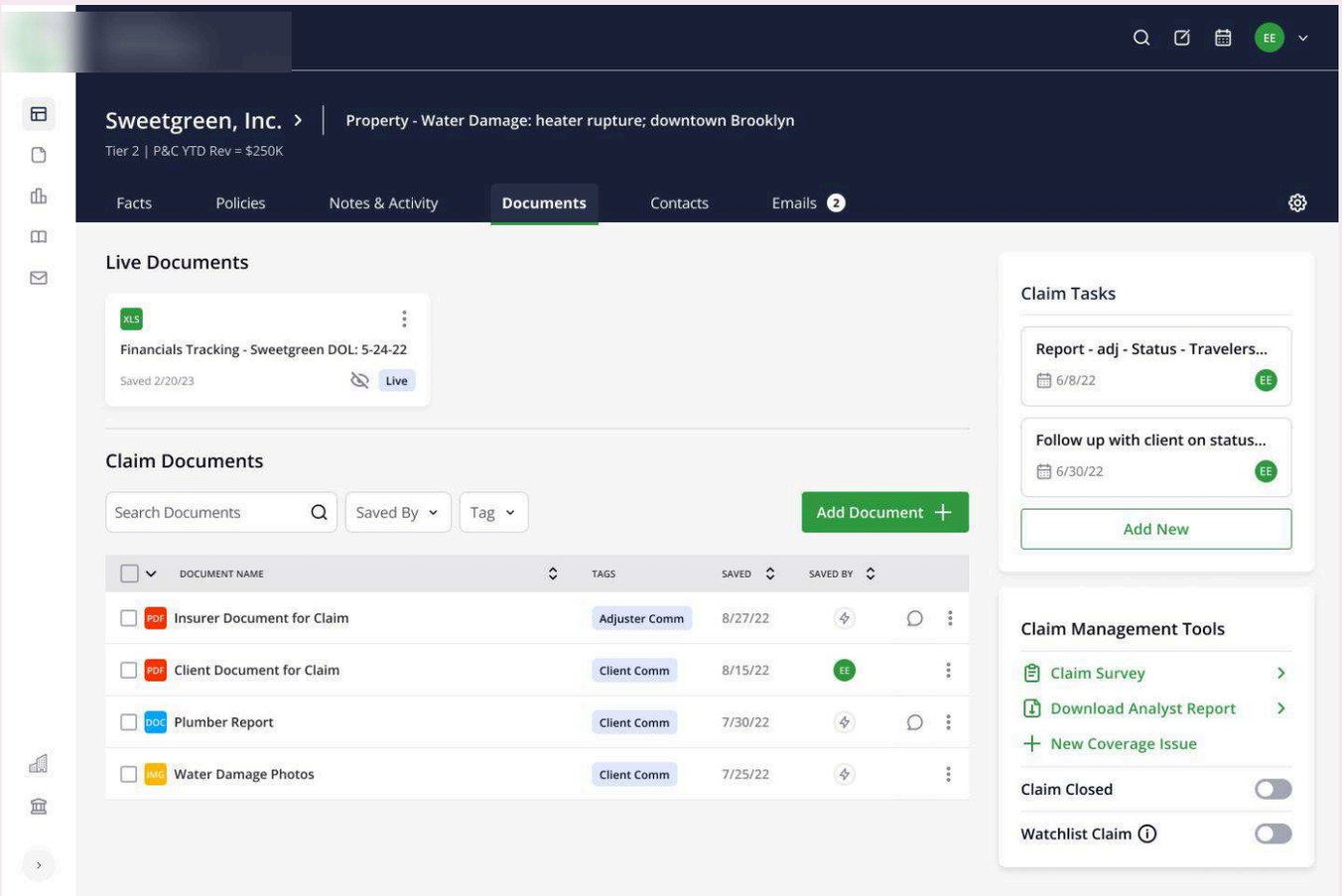
Property Losses Claim Guidelines 2021 Oct 22, 2021

Incident Reporting Form - Client(1) Jul 27, 2021

Guide to Reporting Cargo or Transit Insura... Jul 07, 2021



New System - Document Management



Claim Experience - Existing vs New System

Existing System - Insurer Contacts

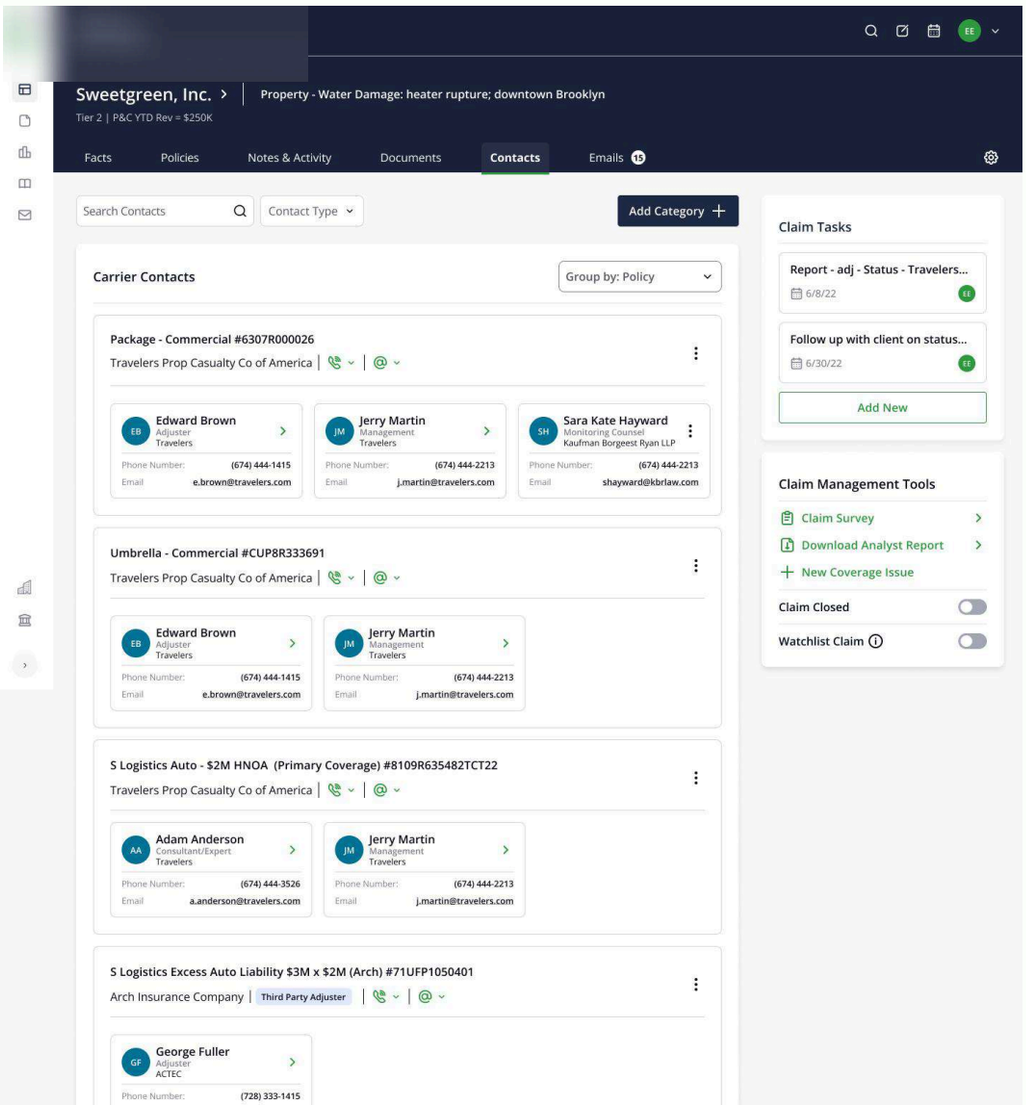
Excel Carrier List_Master_WithFNOLtab_04_08_2022_Excel - Saved

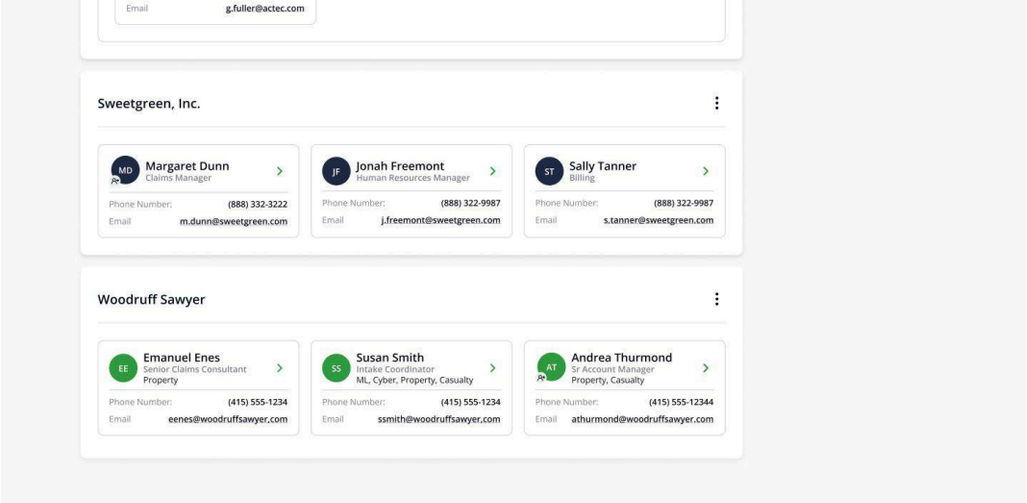
Master Carrier List (Updated as of 10/11/2021)

Carrier	Phone	Email
AAA	800-672-5246 Claims: 800-922-8228	
ACE/CHUBB	800-433-0385 or 877-267-4316 800.444.6161 - Personal Auto / private risk serv.	aceclaimsfirstnotice@chubb.com
ActecSystems (claim reporting)	800-862-2832	claims@actec.net
Admiral	856-429-9200 - 3	admclaims@Admiralins.com
Admiral (Policies beginning with "BEX")	855-597-7616	claims@berkleycustom.com
Affiliated FM (FM Global)	LOOK FOR EMAIL ACK, no ack, email Deborah Bailey at 'deborah.bailey@fmglobal.com' New Loss - 877-639-5677	newlosssanfrancisco@fmglobal.com LAclaimsnewloss@fmglobal.com
Affinity Insurance		affinityinsuranceclaims@tnwinc.com
AGCS Marine Ins (Allianz/FFIC)		See Allianz
AIG Aviation	877-730-1853	aviationprg.claims@aig.com
AIG / AIG Excess/National Union Fire	877-399-6442 - 1 - 2 - 3 866-473-0756 (XS Dept)	excessfnol@aig.com JSX property claim: CLPrivacy@aig.com Cliam Intake: renee.reddick@aig.com 770-870-2294
AIG Financial Lines	888-602-5246 Cust Svc 913-495-6009 (Megan Ille)	
AIG Private Group	888.724.8883, 888.760.9195	afterhours-group@aig.com
AIG World Source for foreign auto claims	866-979-2790	

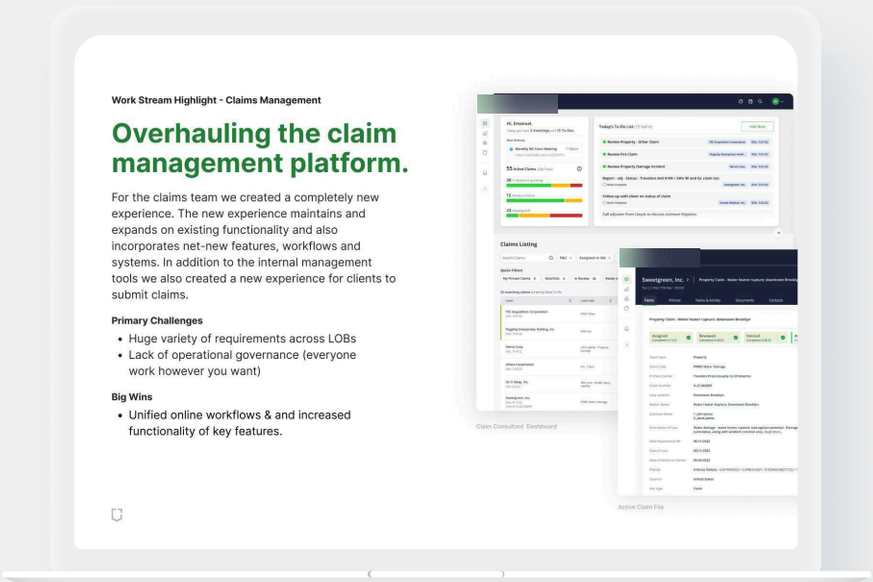
FNOL Master Carrier List | Master Carrier List

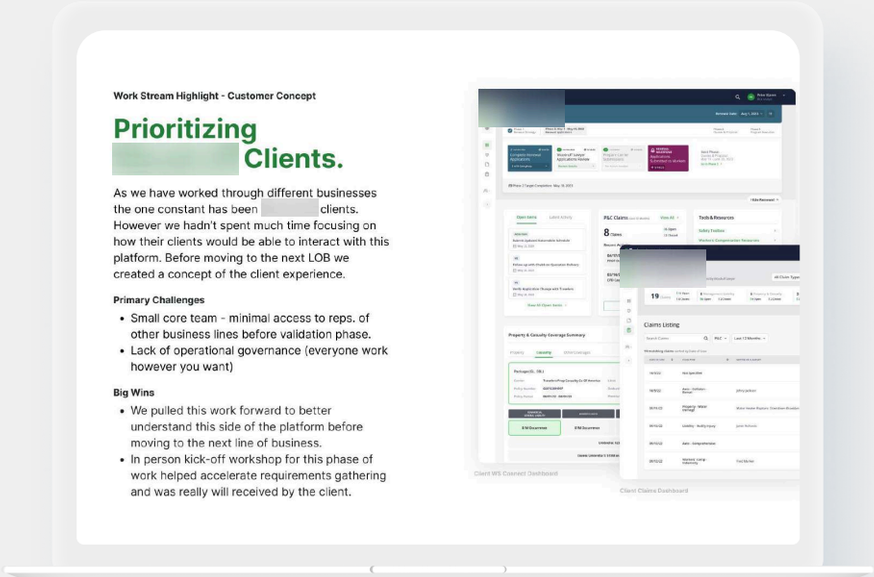
New System - Contact Management





Enhanced Experience



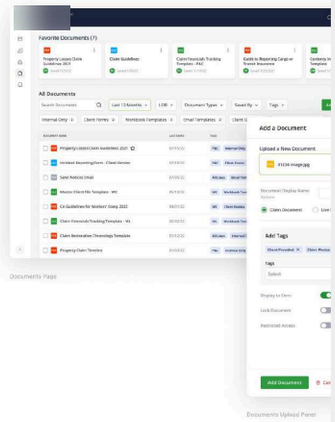


Common Core Modules

Document Management

Capability Highlights

- Auto-extract and save documents from email
- Link to clients and lines of coverage
- Select attributes to define naming & storage
- Add tags and annotations
- Toggle client visibility on/off
- Restrict access to defined client users
- Lock document to internal users
- Enable live documents for collaboration

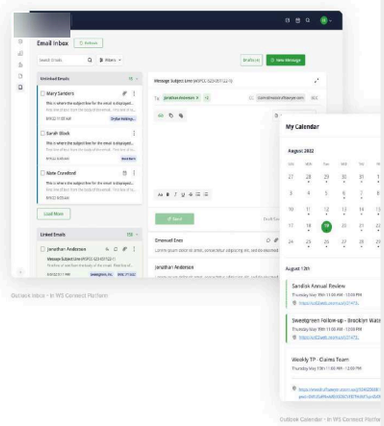


Common Core Modules

Integrated Outlook

Capability Highlights

- View user's outlook inbox
- Link emails to client and lines of coverage
- Add attribute tags and annotations
- Auto-extract and save documents
- Send and receive auto-linked emails
- View user's outlook calendar



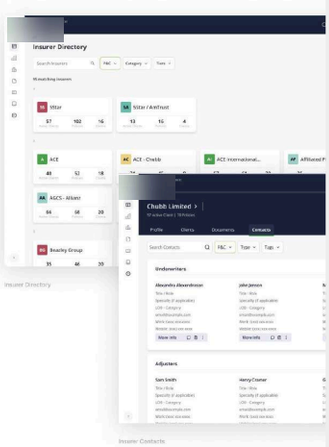
Enhanced Experience

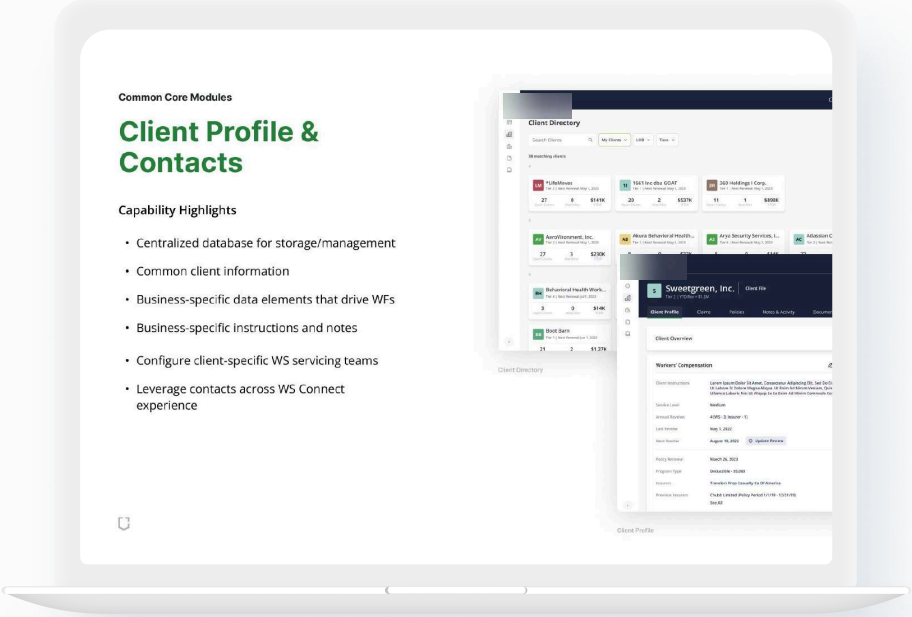
Common Core Modules

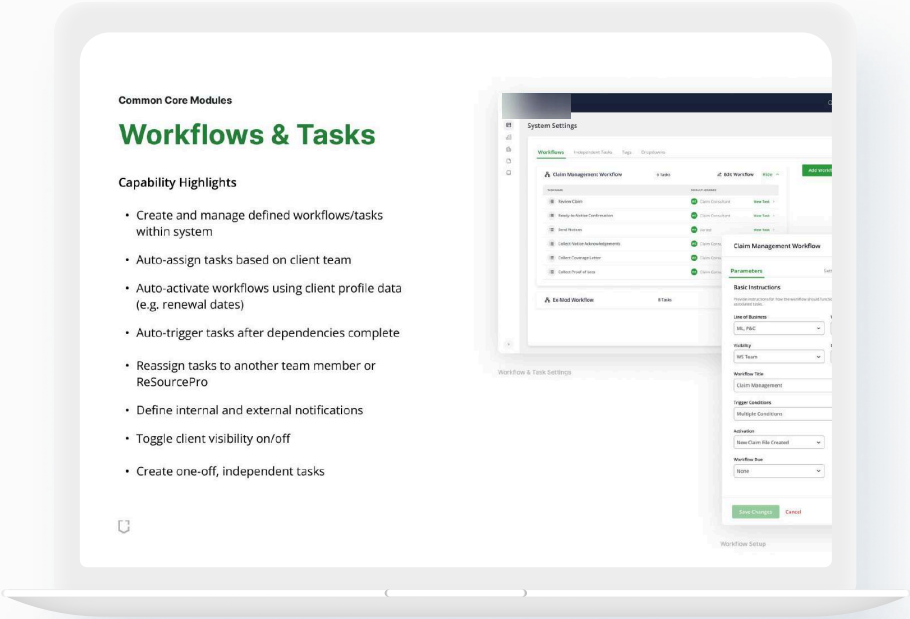
Insurer Page & Contacts

Capability Highlights

- Centralized database for storage/management
- Leverage contacts across WS Connect experience
- Add new contacts
- Edit contacts

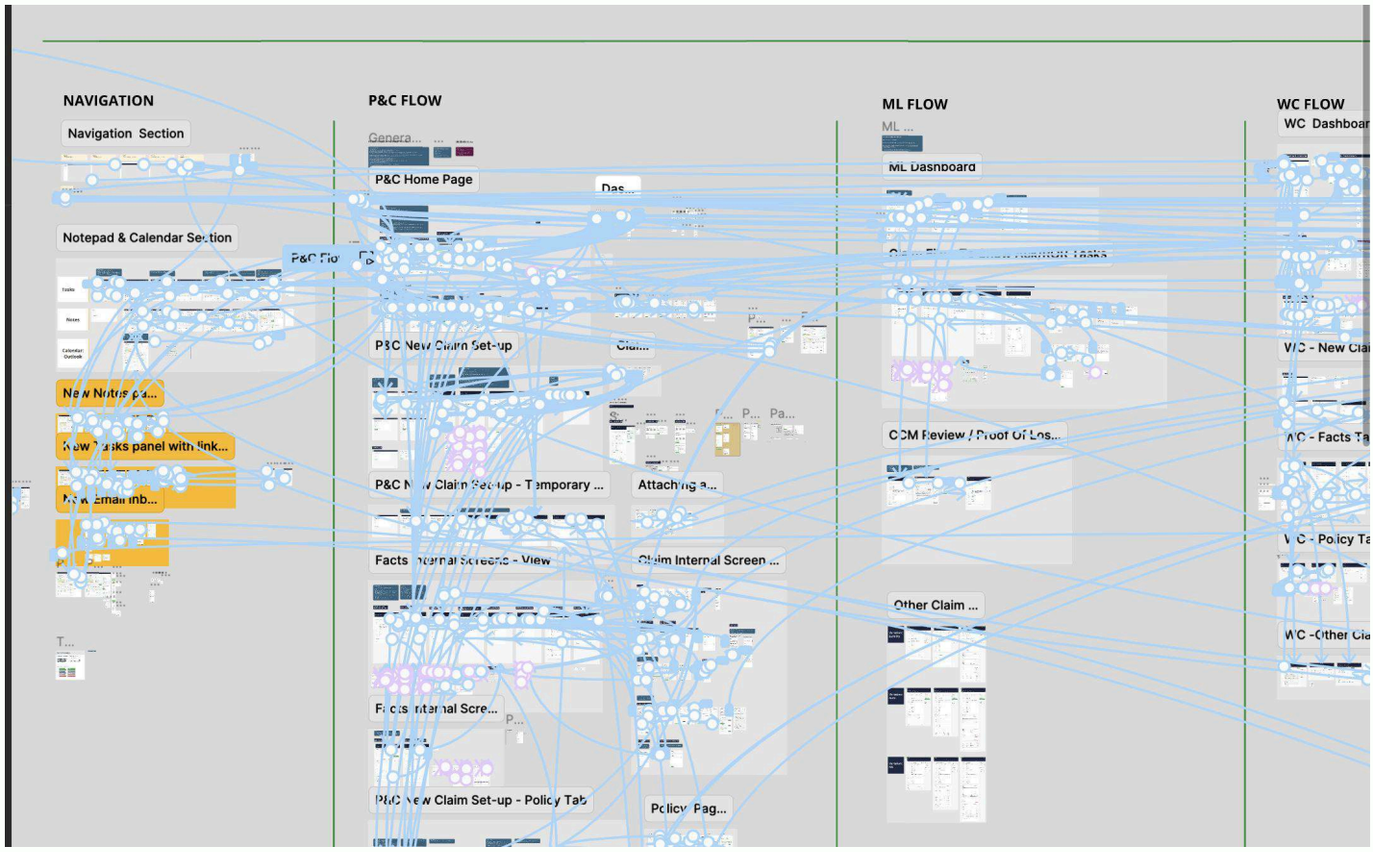






Prototype

Done the detailed level of prototype which includes the micro interaction to showcasing with Business leaders and Development team.



Remote Test - UnModerated

Conducted Remote Un-Moderated Testing session with the set of users. **Tool used - User Testing**

Remote Unmoderated Usability Test Example: Claims Experience

The following test was set up and run on UserTesting.com. The script and tasks were adapted from the in-person Usability test.

The purpose of Demographic screeners Is to focus on people who have the attributes of interest:
TARGET AUDIENCE:
6 computers Users, Age 18–65+

The following screeners filter for participants who have had recent and somewhat frequent travel experiences:

SCREENER QUESTION 1:
(Allow participants to select only one answer)

The last time I created a claim file was...
() I have never created claim file
() More than a week ago
() Between 4-5 days ago
() About 2-3 days ago
() Few hours back
() None of the above

Participants start at the New Claim Experience

START URL:

https://www.figma.com/file/HQ6HaDyEfJIJKGqXxNH4JP/Claim-Detailed-Prototype?type=design&node-id=434%3A91397&mode=design&t=ks5KVMmn8P66C6Y8-1

INTRODUCTION:
Imagine you are helping your consultant to create a claim file.

TASKS:
1. What frustrated you most about this site? What did you like the most about it? [Verbal Response]

2. What information is most important to you when you create claim? [Verbal Response]

3. Go to the dashboard and search a XYZ client after that create a new claim file for the same client.

4. Did you complete the task successfully? [Success: Yes, No]

5. Overall, this task was: [Rating Scale: Very Difficult to Very Easy]

6. Was the information provided not at all clear (1) or very clear (5)? [Rating Scale: Not at all clear to Very clear]

7. What, if any, additional information, tools, or features would have helped you to plan the flight? [Verbal Response]

Result

UserTesting Remote Testing

Ordered By Internal Company
Order Date Nov 10 2023, 5:03am PDT
Number of Participants 6

Need help? support@usertesting.com

Username	User1	User2	User3	User4	User5
Test ID #	2231796A	2231796F	2231796B	2231796C	2231796D
Completed Date & Time	Nov 10 2023, 7:42am PDT	Nov 11 2023, 4:23pm PDT	Nov 11 2023, 1:12pm PDT	Nov 11 2023, 1:23pm PDT	Nov 11 2023, 4:38pm PDT
Video	Play Video	Play Video	Play Video	Play Video	Play Video
Participant Demographics					
Device	Computer	Computer	Computer	Computer	Computer
Age	52	24	29	26	39
Annual household income	Less than $40,000	$100,000 +	$100,000 +	Less than $40,000	$100,000 +
Gender	Female	Male	Male	Male	Male
Country	United Kingdom	United Kingdom	United Kingdom	United States	United States
Web expertise	Average	Average	Advanced	Average	Advanced
Operating System	Windows 7 6.1	Windows 10 Home Single Language 10.0	Mac OS X 10.10.5	Windows 10 Home 10.0	Mac OS X 10.11.6
Web Browser	Chrome	Chrome	Chrome	Chrome	Safari
Social Networking	Google+, Linkedin	Google+, Pinterest, Twitter, Linkedin, Facebook	Pinterest, Twitter, Linkedin, Facebook	Facebook, Linkedin, Google+, Pinterest	Facebook, Linkedin, Twitter, Google+
Designation	Consultant	Account Executive	Consultant	Claim Coverage Manager	P&C Consultant
Screeners					
Question 1 The last time I used the existing claims application on?	Today	2 days back	About 4 hours back	2 hours back	Last week may be
Question 2 Typically, I check emails ...	4-6 times per day	4-6 times per day	4-6 times per day	More than 7 times per day	More than 7 times per day
Question 3 In daily work, do you log into epic system	Yes	No	Yes	Yes	Yes
Notes					
Tester System Info					
Browser Version	Chrome	Chrome	Chrome	Chrome	Safari

Session Details | Metrics

UserTesting Remote Testing

Ordered By Internal Company
Order Date Nov 10 2023, 5:03am PDT
Number of Participants 6

Need help? support@usertesting.com

Notes					
Tester System Info					
Browser Version	Chrome	Chrome	Chrome	Chrome	Safari
Color Depth	32	32	32	32	32
CPU	Intel(R) Pentium(R) CPU B970 @ 2.30GHz	Intel(R) Core(TM) i3-5005U CPU @ 2.00GHz	Intel(R) Core(TM) i5-3210M CPU @ 2.50GHz	Intel(R) Core(TM) i7-6500U CPU @ 2.50GHz	Intel(R) Core(TM) i5-4258U CPU @ 2.40GHz
Free Disk Space	180268.54 MB	105325.91 MB	253024.35 MB	12228.73 MB	4616.47 MB
Free Memory (RAM)	823.19 MB	1465.14 MB	50.2 MB	3792.86 MB	28.04 MB
Operating System (OS)	Windows 7 6.1	Windows 10 Home Single Language 10.0	Mac OS X 10.10.5	Windows 10 Home 10.0	Mac OS X 10.11.6
Screen Resolution (in pixels)	1366 x 768	1366 x 768	1280 x 800	3200 x 1800	1280 x 800
Total Memory	4004.27 MB	4011.08 MB	4096.0 MB	8097.91 MB	4096.0 MB
Study Protocol					
Starting Url https://www.figma.com/file/HQ6HaDyEfJIJKGqXxNH4JP/Claim-Detailed-Prototype?type=design&node-id=434%3A91397&mode=design&t=ks5KVMmn8P66C6Y8-1					
Introduction Imagine you are going to create a new claim file					
Post-Test Questionnaire Question 1 What frustrated you most about this site? What did you like the most about it?	I was not able to locate what I wanted. It appeared that there was a time limit to enter an email address. It was frustrating that I couldnt find it later.	Nothing as such frustrated me about this website. I liked how informative the site was. I wasa given precise details about how to create a claim file	What frustrated me the most was not having all the information I needed on one screen without having to hover over tabs.	The most frustrating thing about this site was having too much information in one location. It created a hectic atmosphere that needs more simplicity and less of a "spread sheet" look to it.	I think sometimes a font color tweak car be helpful when you have a line like the search summary (that is editable, on the results page). I missed the class options on one of the tests as it wasn't really set off, so to speak.

Session Details | Metrics

Measuring Success

One of the more common metrics used in user experience is task success or completion. This is a very simple binary metric. When we run a study with multiple users, we usually report the success (or task-completion) rate: the percentage of users who were able to complete a task in a study.

Let's say, for example, that the users' task is to find a closed claim for specific client reported by the policyholder. True task success would mean just that: User able to find the closed claim for the right policyholder. If a test user leaves the site in a state where this event will occur, we can certainly score the task as a success. If the user fails to find the closed claim, we can just as easily determine the task a failure.

But there are other possibilities as well. For example, a user might:

- search all active claims of specific client and then chose for closed ones
- fail to navigate to closed claims option
- got the closed claim data but fail to match the policy holder

In the closed claim example, we might define several levels of success:

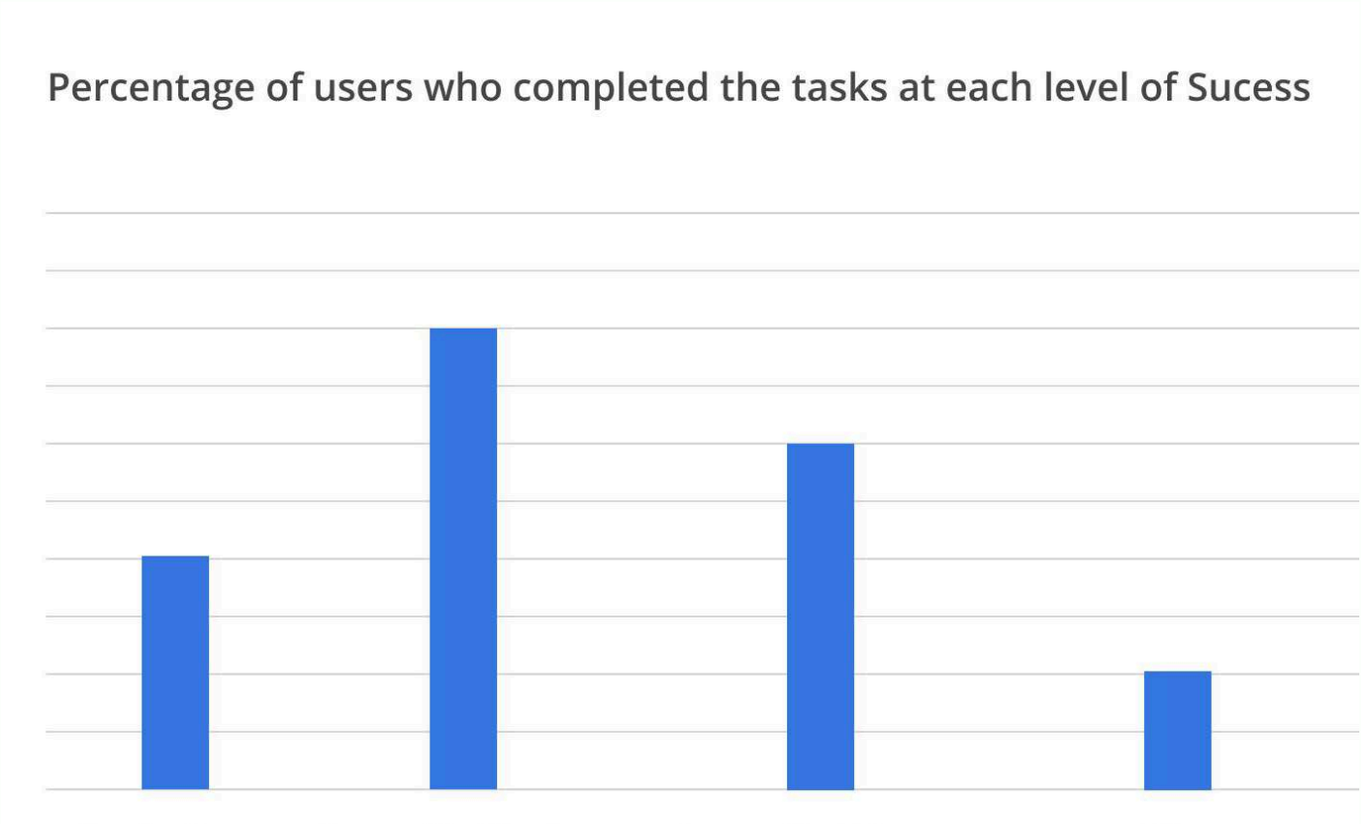
- **complete success:** the user able to find the closed claim for the right policyholder
- **success with one minor issue:** the user able to navigate to closed claim but after checking all the active claims for the policy holder
- **success with a major issue:** the user able to find the closed claim but performed too many steps in order to find
- **failure:** the user is not able to find the closed claim of specific client for the policy holder

Reporting Level of Success

To report levels of success, you simply report the percentage of users who were at a given level. So, for example, if out of 50 users, 20 completed the task with a minor issue, you would say that 40% of your users were able to complete the task with a minor issue. Like for any metric, you would have to report the confidence interval for that number.

Level of success	Number of users (out of 50)	How you report it
Complete success	10	20% of our participants were able to complete the task successfully with no error. Based on this result, we expect that between 11% and 33% (*) of our general user population will complete the task with no error.
Success with a minor issue	20	40% of our participants placed an order but had a minor issue. Based on this result, we expect that between 27% and 59% (*) of our general user population will complete the task with a minor error.
Success with a major issue	15	30% of our participants placed an order but encountered a major issue. Based on this result, we expect that between 19% and 43% (*) of our general population will complete the task with a major error.
Failure	5	10% of our participants were not able to place the order. Based on this task, we expect that between 4% and 21% (*) of our general population will not be able to place an order.

Note - (*) In this table, the ranges represent 95% confidence intervals calculated using the Adjusted Wald method.



Complete Success | Success with a Minor Issue | Success with a Major Issue | Failure

We can also use other metrics such as number of errors; for example, we could define different error types (e.g., wrong claims, wrong consultant) and track the number of people who made each of these errors. Doing so may actually give you a more nuanced picture than using levels of success because you might be able to say precisely which of the different errors is more common and, thus, focus on fixing that one.

Usability Key Performance Indicators

Measurable Performance	Usability Key Performance Indicators	User Segment
Efficiency	Easily navigate to claims file in less than 1 minutes	Consultant/Co-ordinator,Coverage Manager,Service Team
Effectiveness	More than 85% user able to create claim in new system	Consultant/Co-ordinator
Errors	Able to create a claim file without loosing a track	Consultant/Co-ordinator
Memorability	User able to perform complex tasks coming to system after long time	Consultant/Co-ordinator,Coverage Manager
User Satisfaction	Integrated Outlook, Insurer Contacts and Claim Track	Consultant/Co-ordinator,Coverage Manager

Key Takeaways

- User-Centric Design
- Simplified Navigation
- Streamlined Workflows
- Integration with External System
- Collaborative Solution
- Advanced Analytics and Reporting

BACK

FEEDBACK

Created with Figma

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