

UX Case Study Portfolio

User Experience Design considers the needs, behaviors, and frustrations of those who use the product, whether digital or physical, to accomplish a larger goal. This portfolio tells the story of several projects that Grant Baker has completed in recent years.

Re-aligning a Redesign

Mutual of Omaha's life insurance section was a hodgepodge of upwards of 40 individual web pages still locked in a non-responsive template. Worse, the pages were put together from a product perspective and made little sense to real people depending on the information to make a life insurance decision.

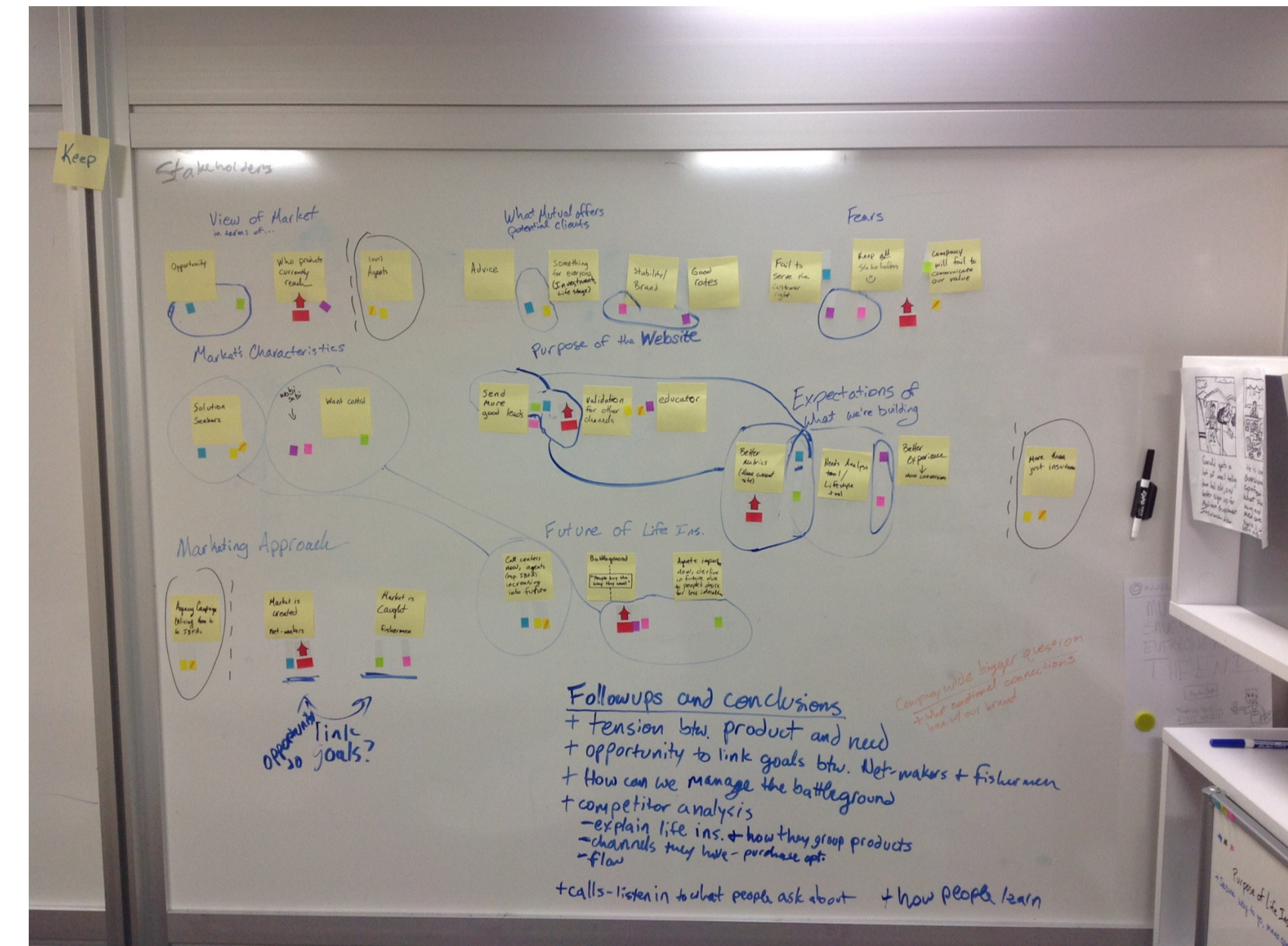
The Redesign

In an effort to provide a streamlined experience, the team launched a redesign campaign. Turf wars between distributions and mixed messages from stakeholders slowed development to a crawl. Without the benefit of strong design leadership uniting the project team around user needs, the site launched with significant usability issues owing to compromises to fulfill stakeholder requirements.

Understanding the Problem

When my pair design partner and I first came on board the project, we interviewed stakeholders individually. Discovering a disparity in what we were hearing, we hosted a participatory workshop to help align the stakeholders' visions. One participant, initially skeptical, shared afterwards that it was the most useful meeting he had been to in quite awhile.

UX design's benefit derives from focusing on user needs. One of the big problems that the team ran into during the first wave of the redesign was an over-reliance on assumptions rather than user research. To address this problem, we conducted interviews with both recent life insurance purchasers and those researching a policy to understand their goals, needs, behaviors and frustrations. This was the data we needed to focus the design team on solving the user's problems.



Understanding stakeholder feedback from was critical to the success of getting the re-design back on track. By using UX methods to uncover latent needs, we were able to better understand how to structure the product pages.

Re-aligning a Redesign

Communicating the Vision

We next synthesized the data into goal-based personas to keep the entire project team focused on the most important problems and see life insurance from a consumer perspective. We also wrote scenarios to extract features users actually needed to help them understand life insurance.

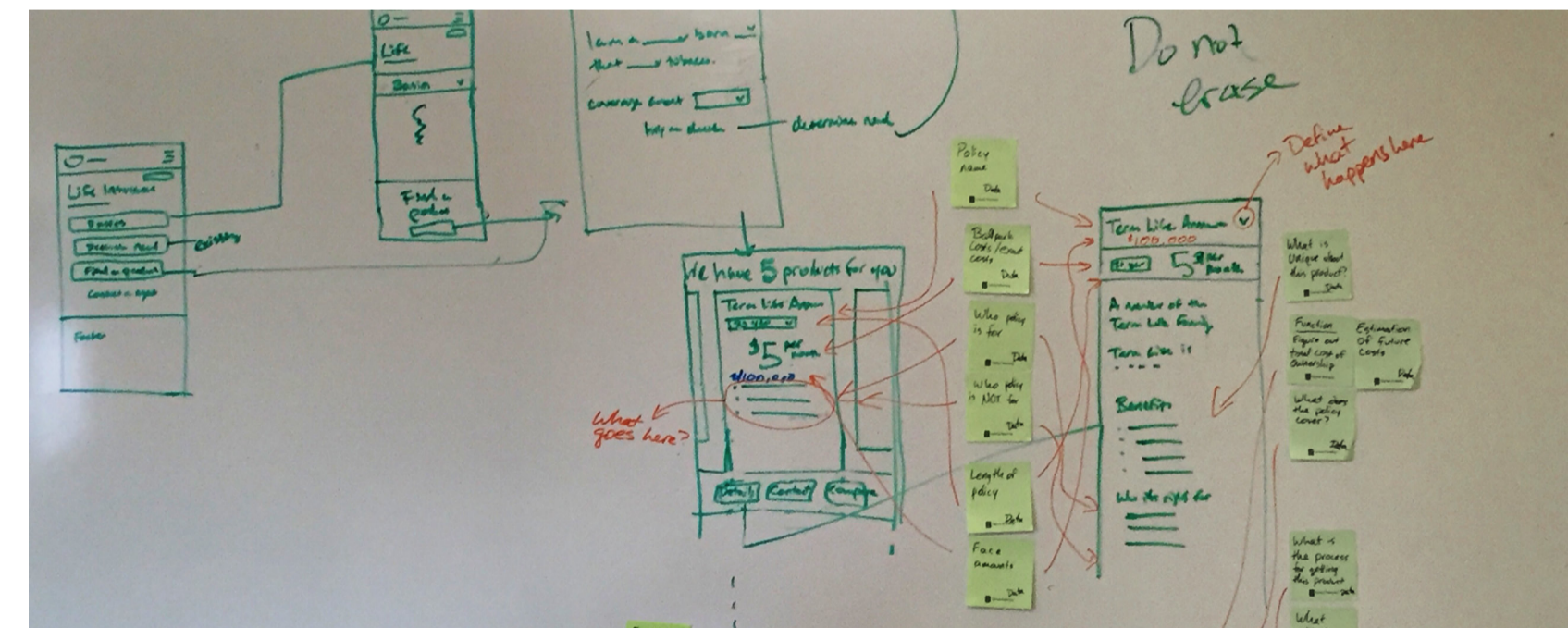
Getting the Redesign Back On Track

Focusing on the user enabled us to balance competing agendas and design what was truly needed. During this process, we identified a major problem for customers was understanding what strand of life insurance was a best fit for their needs. When we went to design the flow of the section, we paid special attention to describing who each product is built for and how each one works. Not only that, but we were able to address each stakeholder's concern and get their buy-in for the project.

This project paved the way for a new, structured approach to product content and is now the standard for our product pages. We used the personas and other artifacts from this project to inform the MutualofOmaha.com redesign. What made it all possible was a laser-focused approach on helping users accomplish their goals.



I chose to run an experience workshop to better understand stakeholders' vision for the life insurance product line.



With the scenarios defined, we were able to identify and design the features our personas would actually use.

Organizing Chaos

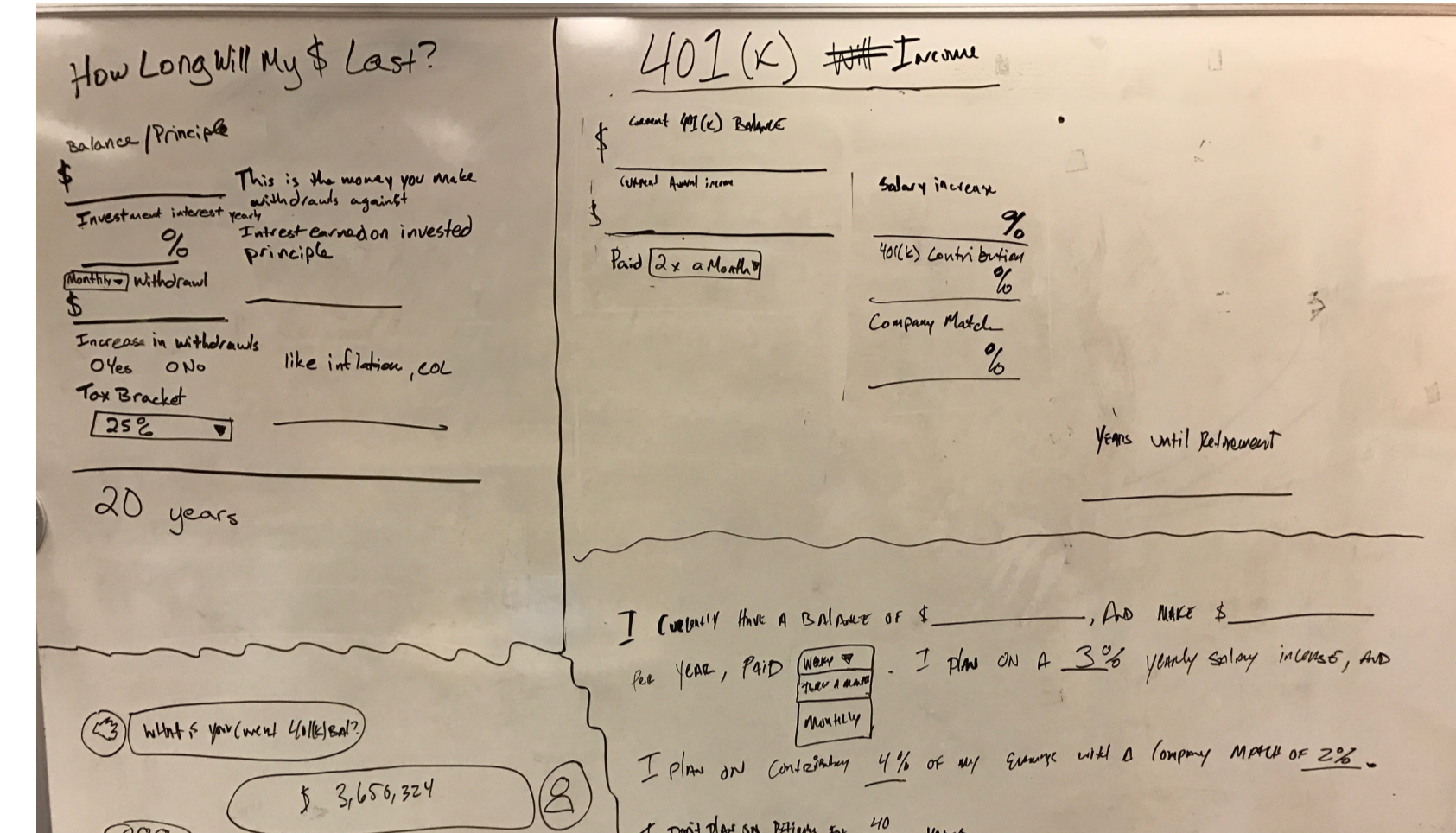
Mutual of Omaha's website had outgrown itself. Demands on the team's time led to a mix of up-to-date product sections side by side with sections that weren't even responsive. Content was inconsistent, it had little support for the company's omni-channel initiatives, and the launch deadline was an aggressive 9 months.

Preparing for Change

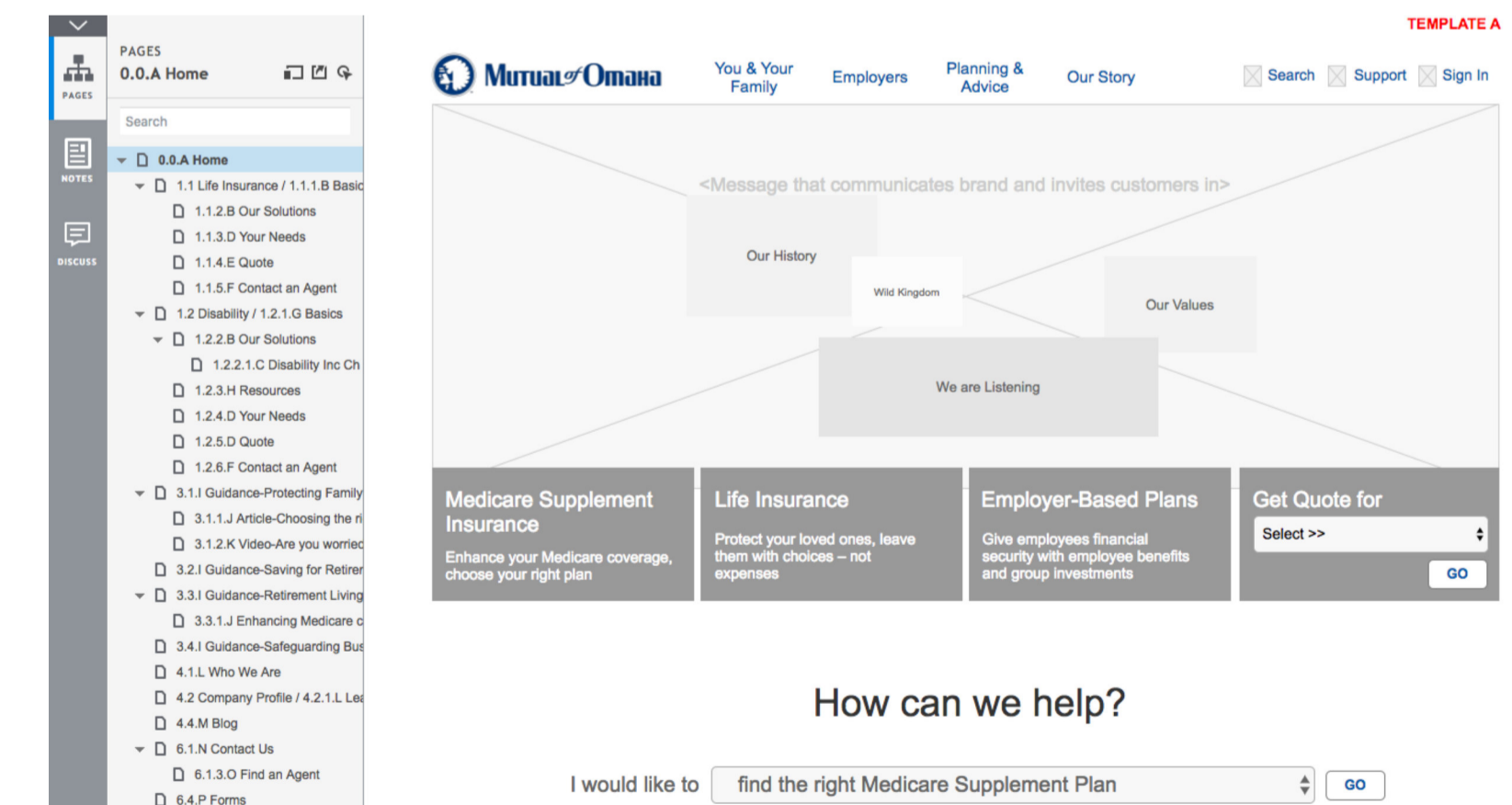
For a project this large, our design team took on the role of managing several agencies in addition to leading the way on the redesign. One of our first steps was stakeholder interviews. This project would touch every division in the company, so we interviewed everyone from managers in every product line to the CEO and others in the C-suite. We worked with our partner agencies to develop an information architecture that would both fit the content we had today and allow for expansion. Usability and tree testing allowed us to verify our architecture and content design. Finally, we relied on work I had done previously in the life insurance section to help us organize product content.

Launch and Reception

The website launched to great acclaim. It took the whole team—I even jumped into the code to get it across the finish line. At last, we had a flexible, scalable platform ready for new growth. We brought consistency to the entire website, we had rewritten and reorganized content, and we supported all distribution channels. And it launched on schedule.



We discovered that the calculators were not optimized for clear inputs and outputs. We fixed that by first prototyping possible solutions at the whiteboard.



We worked with our agency partners to build and test an information architecture that really worked.

A Human-Centered Approach to Sales

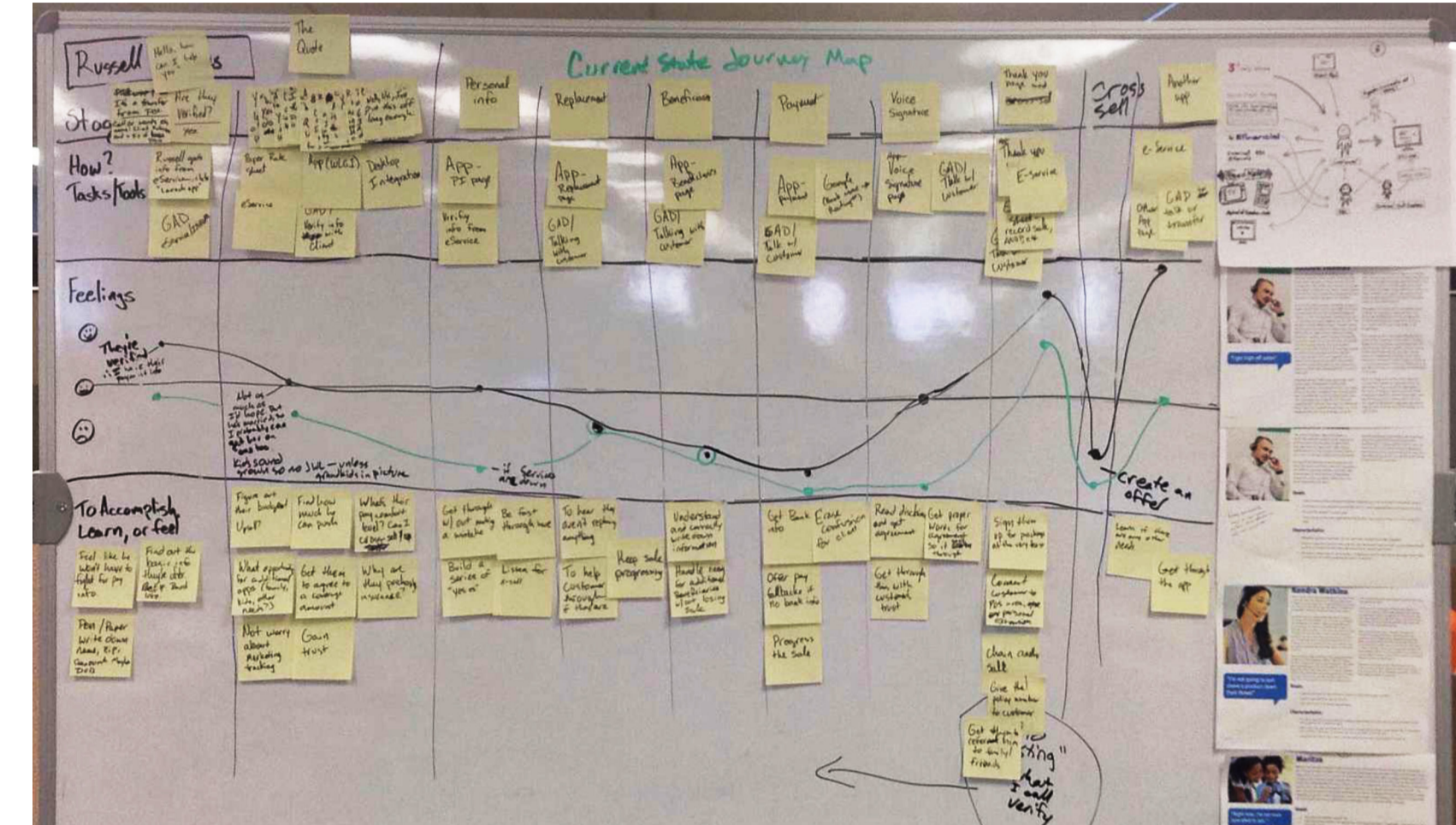
Mutual of Omaha had a multi-faceted problem. While an application was in place for our call-center agents, it had numerous usability problems and an aging infrastructure constantly requiring patches by our development team. Not only that, but the Direct to Consumer area wanted an application that worked for both phone agents and consumers.

Uncovering the Problem Behind the Problem

To tackle this tricky problem, I turned to ethnographic research. First, we sent the developer team to sit with our call-center agents after which I hosted a workshop to help make sense of their observations. I also headed into the field, spending 40 hours listening in and observing our phone agents at work. I interviewed others both in-house and remote third-party agents to dive deeper into what I observed. These helped us understand the systems they used and for what purpose. Something interesting we discovered was that most agents tracked their sales in a spreadsheet to double-check against their paycheck. But that information was scattered across multiple systems. To remedy this we added the information to a table at the thank you screen so they could just copy/paste directly into their spreadsheet and move on to the next call.

Putting the Data to Work

We encapsulated the data into goal-based personas and context of use scenarios to guide feature development. We used these to design prototypes which we tweaked through usability testing. Our work saved hours in training and sales process while fitting neatly into the ecosystem that our agents inhabit.



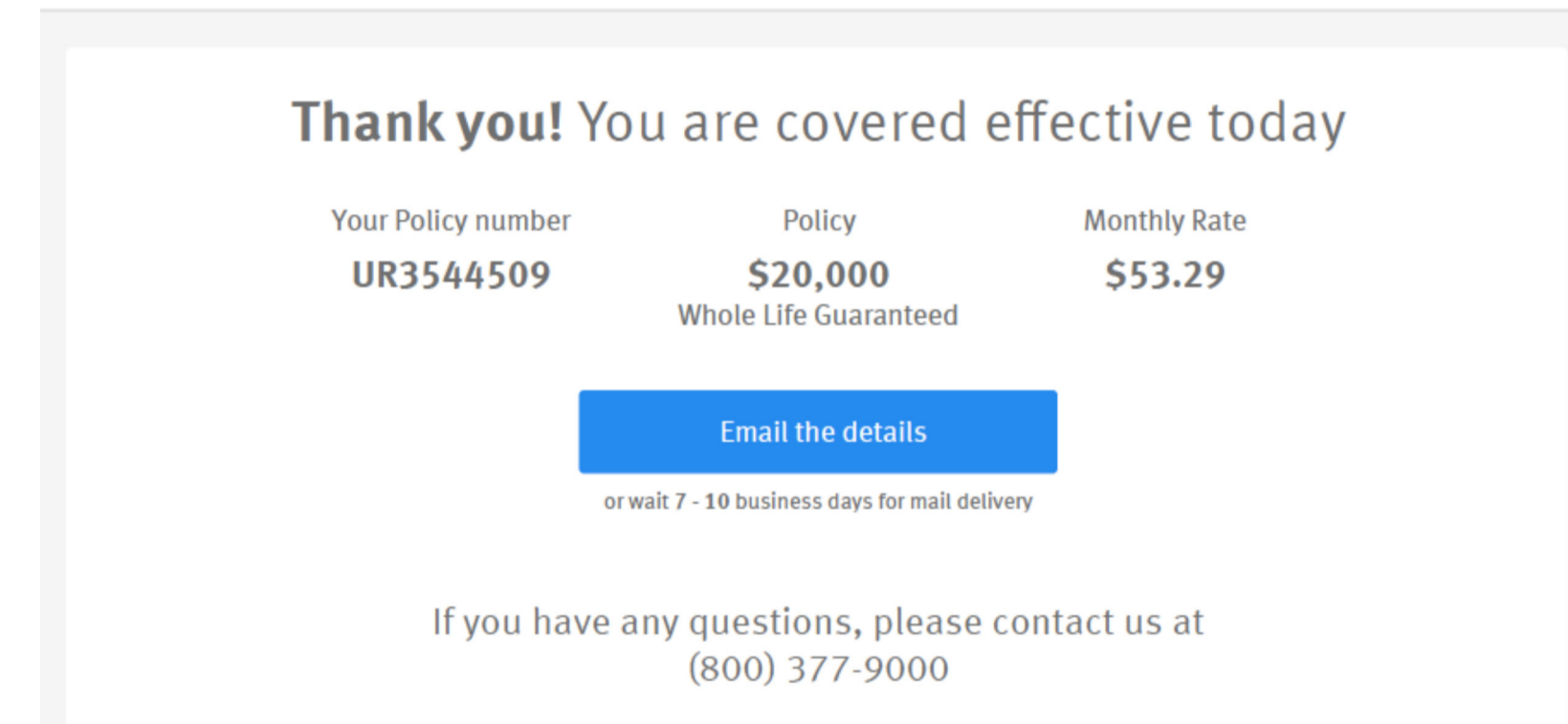
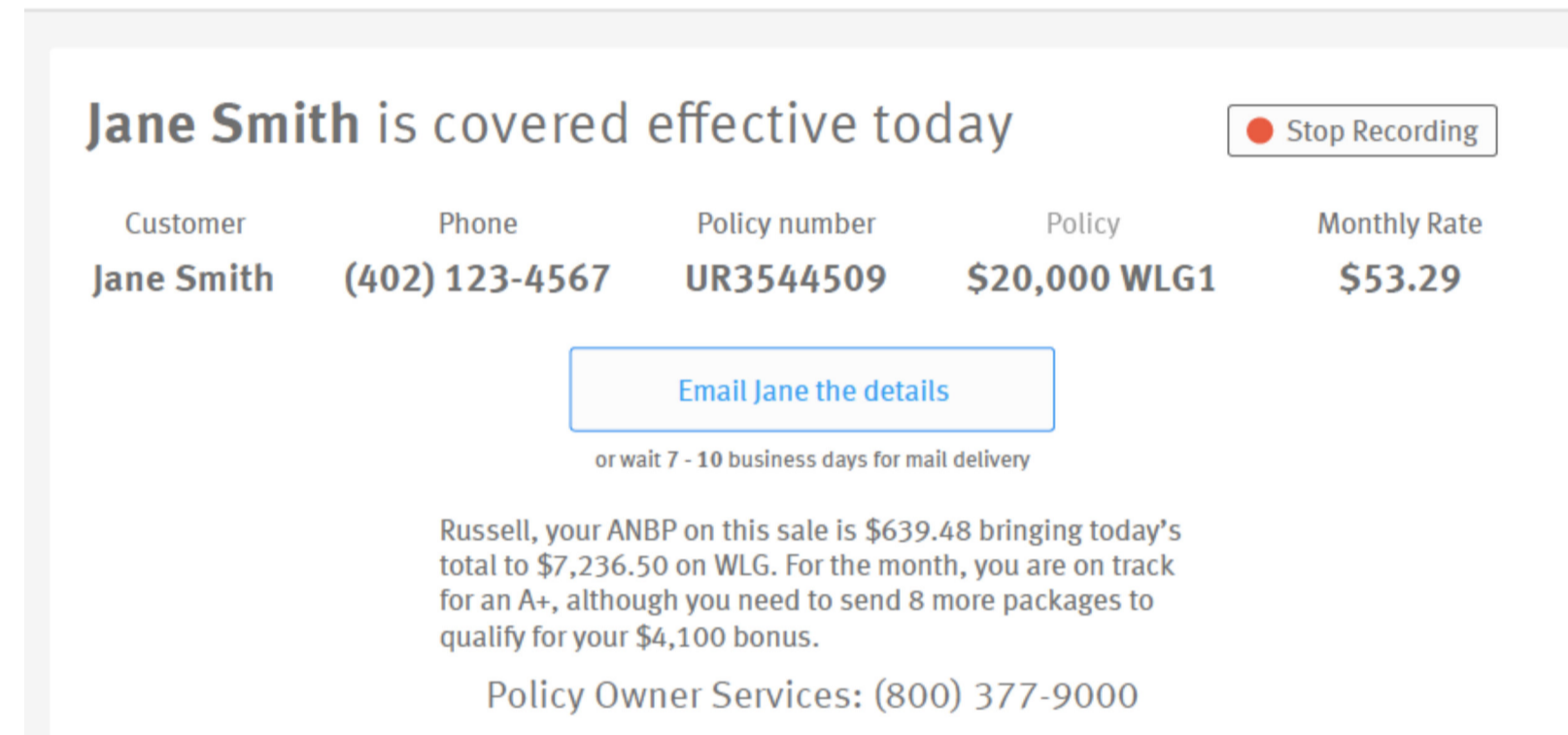
Once we had identified the personas, we mapped out a journey map for each one. This made it easy to see where we needed to focus our design efforts.

Entering beneficiaries had been a pain. We redesigned it so that the application aligns with how the agents work.

A Human-Centered Approach to Sales

Optimizing the Consumer Experience

On the consumer side, we had the personas and scenarios from the life insurance product page. These helped our team adapt the application for a consumer audience. One way we did this was the thank you screen. Each audience needed different information. While the agent needed a wide variety of information for both themselves and the client, the consumer view needed a receipt of the transaction.



Agents utilize a spreadsheet to double-check their paychecks. The information had been scattered throughout the application. We brought the elements they needed to one spot and made it easy to copy/paste that information. We also included information in the spec that would allow the agent to get a better picture of their performance.

Consumers needed more of a receipt and a way to contact a real person in case something went wrong. They needed to know their policy number, what kind of a policy they had just purchased, and what their monthly premium would cost. We made it easy to email themselves the details.

Outcome

Because of this approach, applying for insurance was finally a (mostly) painless experience not only for our phone agents, but our consumers as well. Our customers got easy to understand application they could do themselves. For the agents, we cut training time and gave them an application that worked with their sales process.