

For confidentiality reasons, I am unable to present the completed project. I have created this document to demonstrate my Design Thinking process. If you would like to know more about my experience and my learnings, I am more than happy to discuss.

Project Overview

Annuity Payout Center

"Company provides an ability for the end customer to re-invest (via Annuities) their money within the company. And provides feature to test their investments for maximum 2 years."

My Role

The only designer on the project.
Brainstormed design ideas and streamlined the work-flow with my product manager.
Created wireframes, final screens, visual assets and animations.

Tools

Illustrator, Axure, Visio, Paper & Pencil

Problem Statement (Customer)

To re-invest money, clients have to fill 24-page paper form and send it to TIAA. In that process TIAA employees facing significant challenges to process the application for example: difficult to understand handwriting, missing pages, Missing information, missing documents. For 3 types of annuities, there are 4 kinds of applications. Each application has more or less 24 pages. If the client wants to apply for 2 annuities, He/she will have to fill between 3 to 8 forms depending on the scenario.

Problem Statement (Consultant)

In order to process an application from the clients, internal users are using legacy systems which is over 20 years old. In this practical world the minimum time to complete the process is 40-50 days.!

Creating a Vision

" Design Digital Experiences that helps end customer and Internal associates without Relying on Paper forms."

Design Goals

#1

Simplify the process, build single seamless experience for end customers and all internal associates.

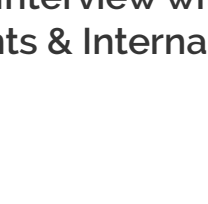
#2

Design service to Reduce the number of touch points in the process.


#3

Transform all paper forms into a single usable digital experience.

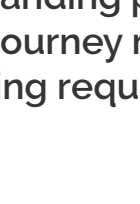
USER RESEARCH & EMPATHY DEVELOPING



Interview with Participants & Internal Associates

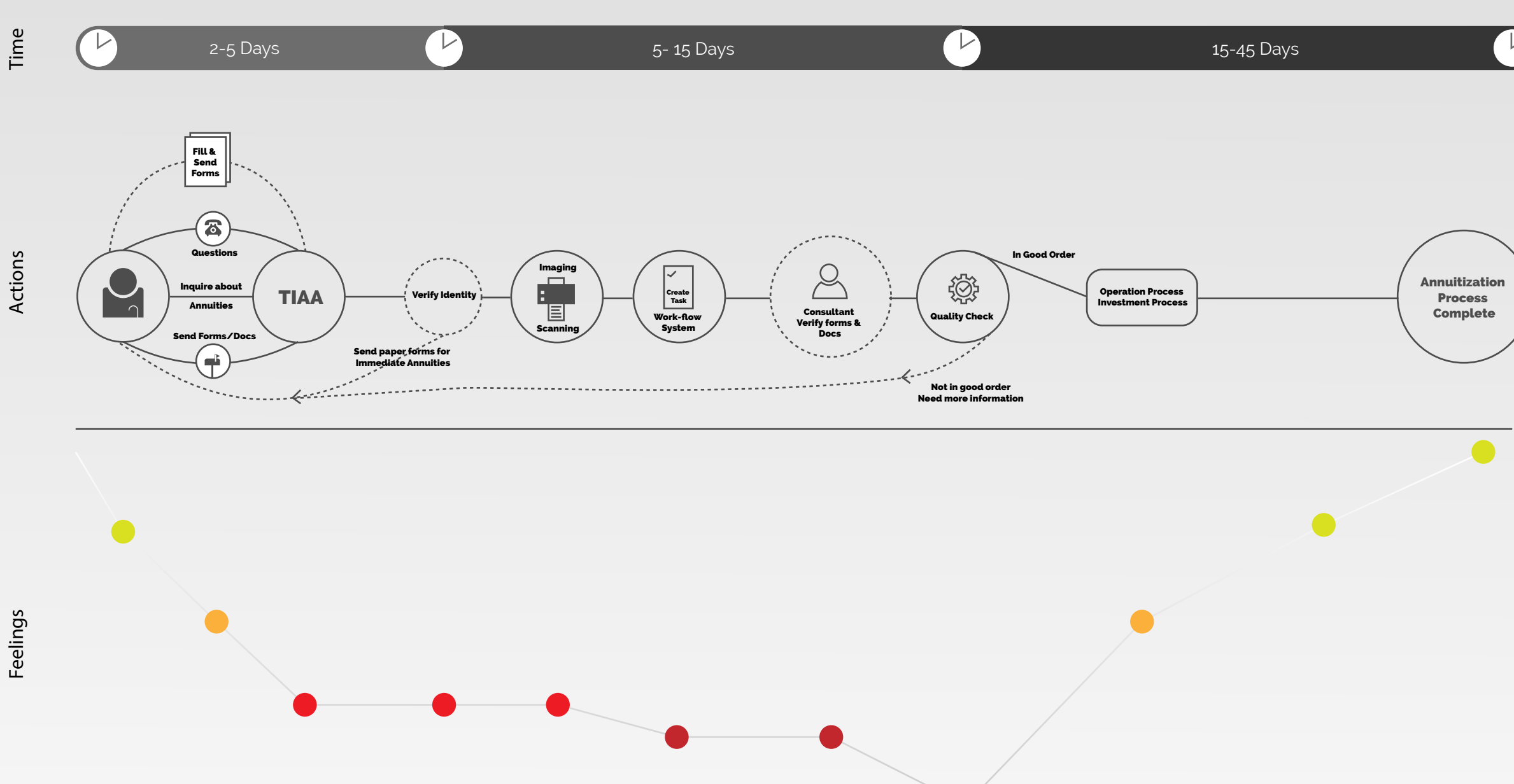


Listen to Call center Recordings

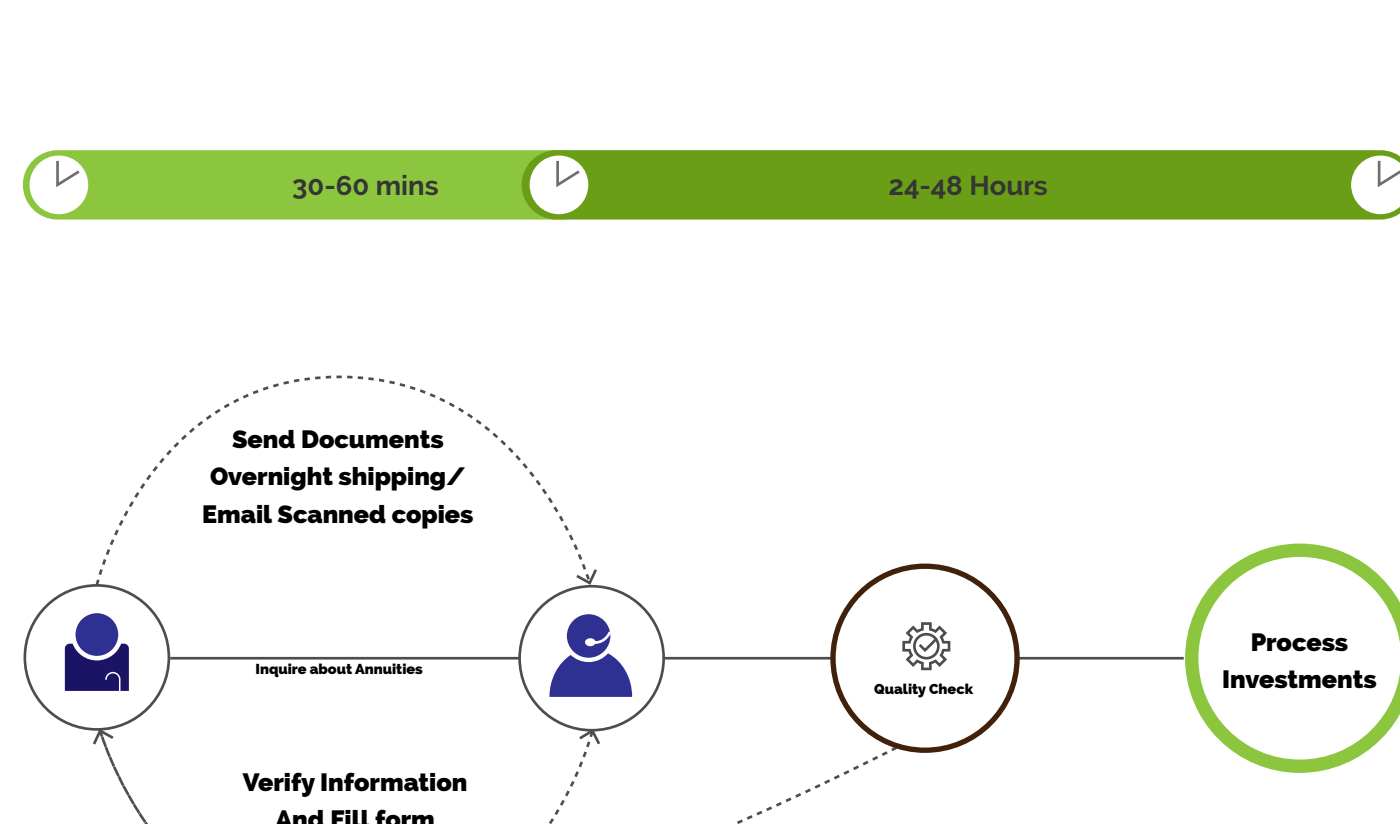


Understanding pain-points, User journey mapping, Defining requirements

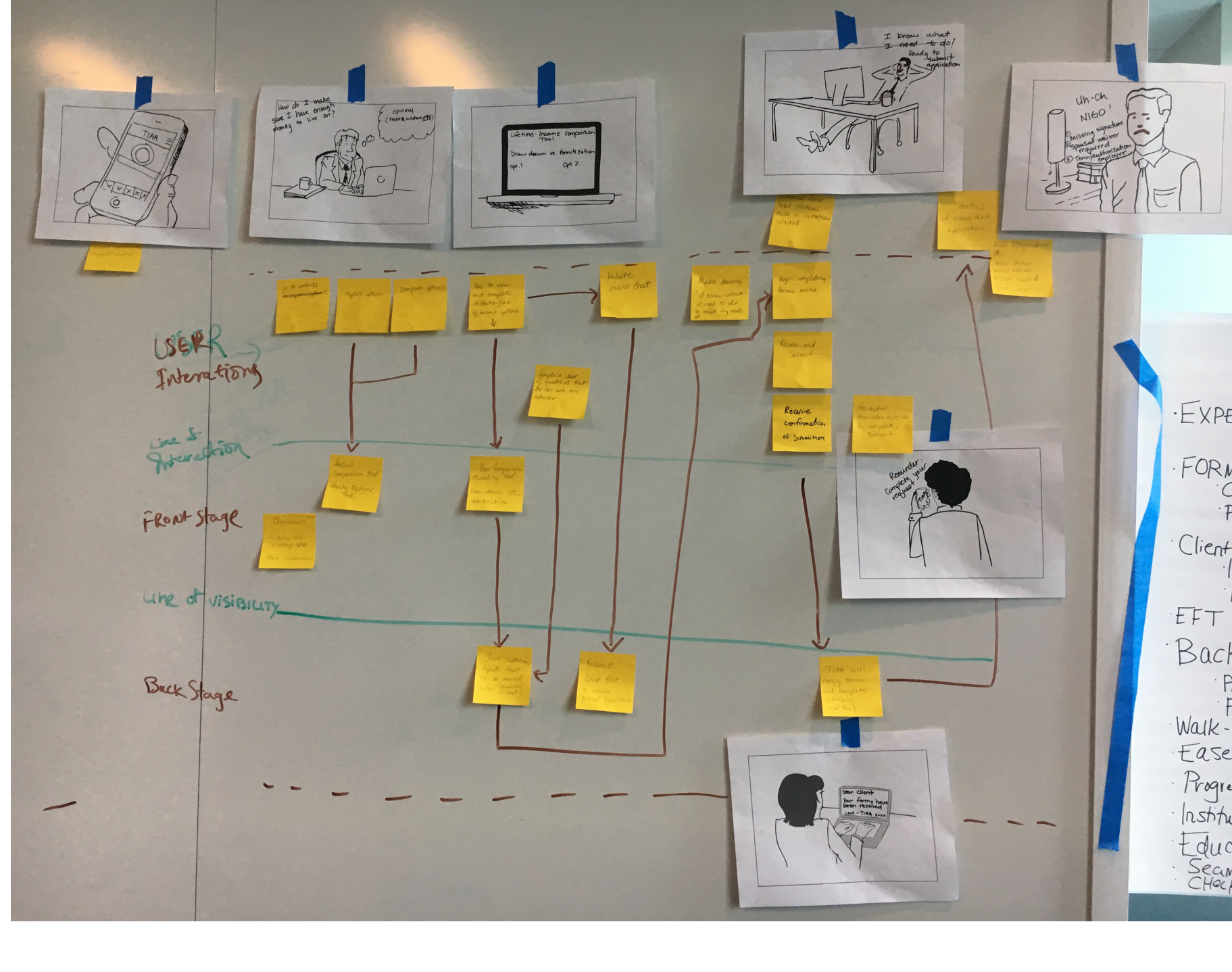
Current State End customer&Consultant use case mapping for Annuization



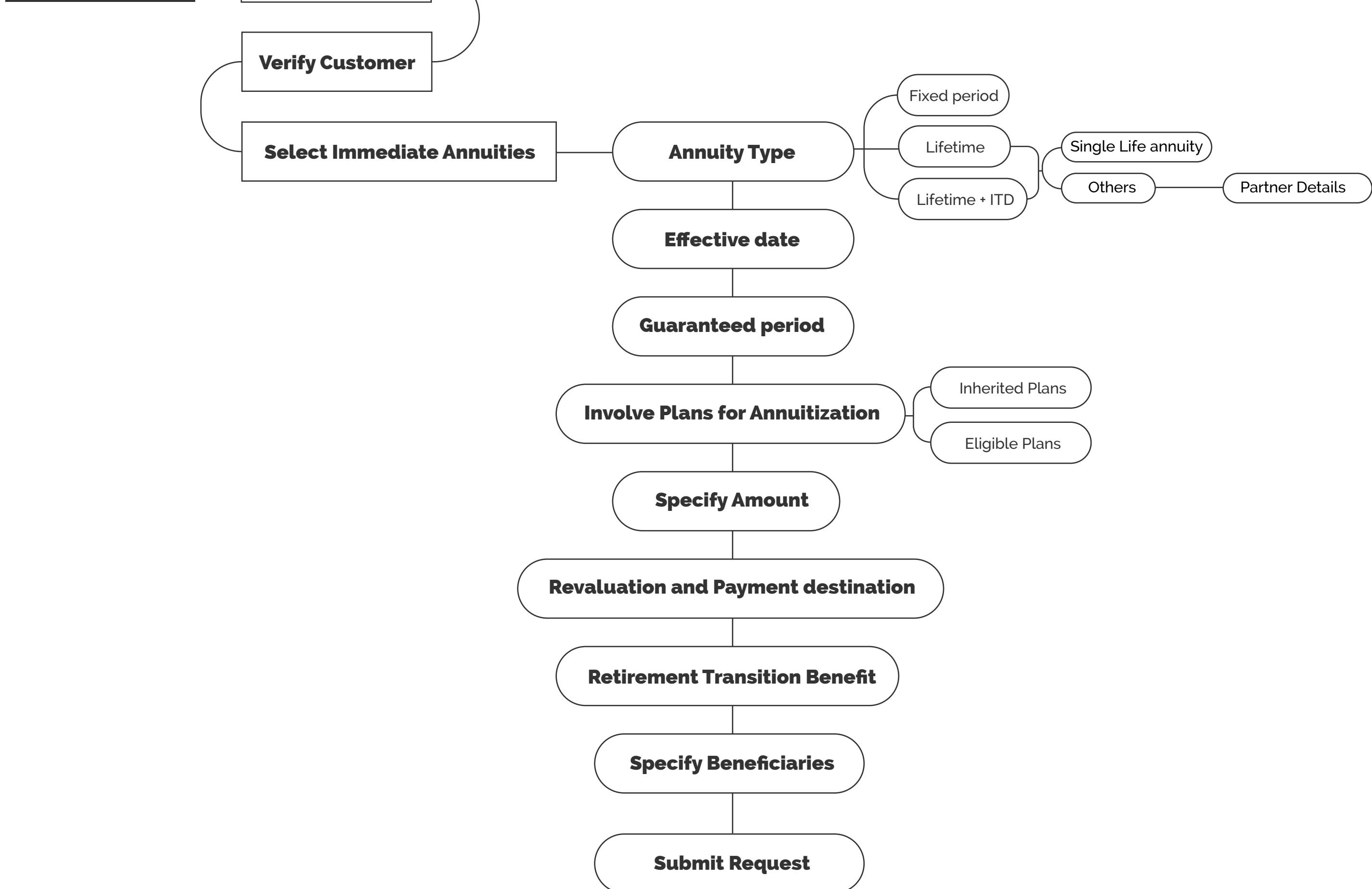
Future state Goal



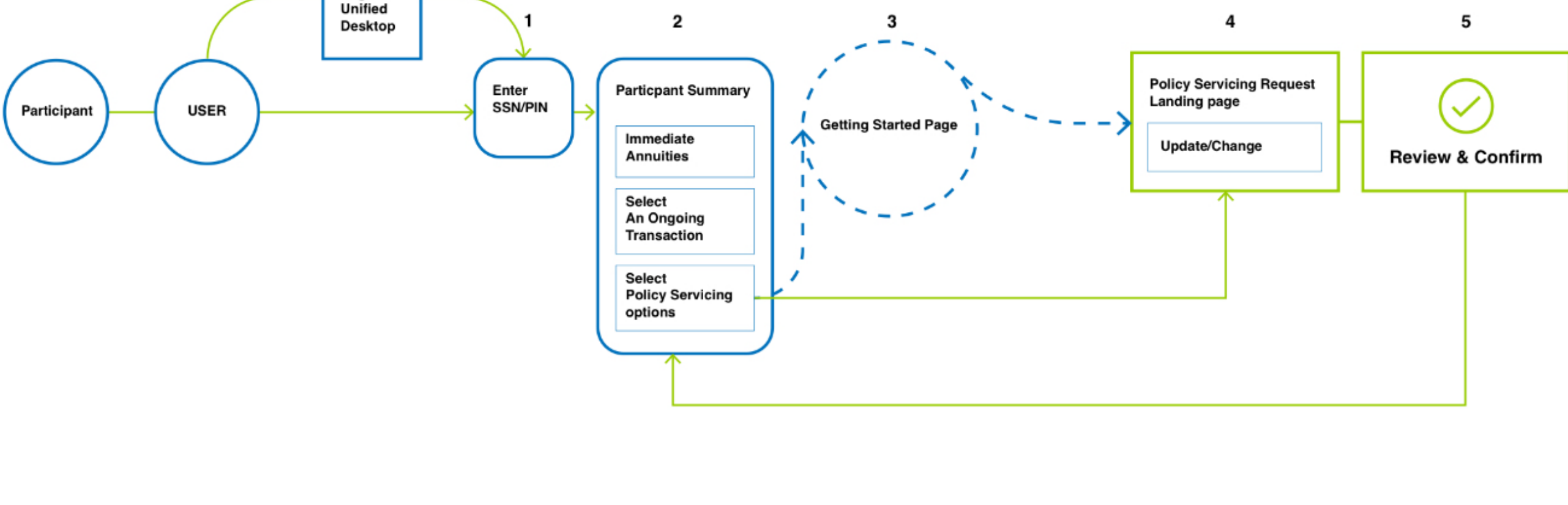
Brainstorm and Service blueprinting



Task-flow Creation for Annuity Request



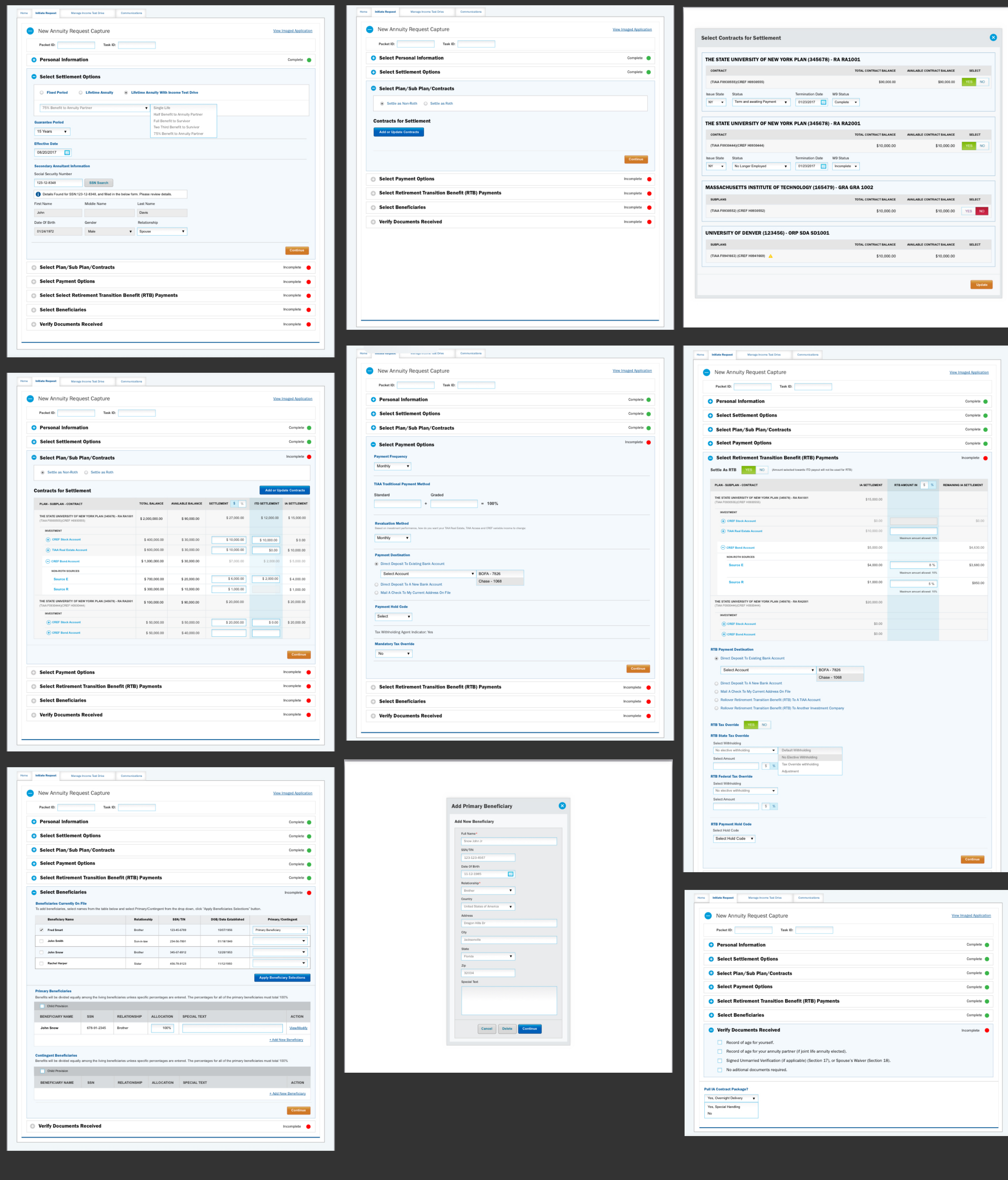
Task-flow Creation for Policy Management



Designing Digital Experience

Throughout the process, I was partnered with business analysts, iterated and gained insights internally and presented to stakeholders to expand the scope as it was necessary to build up customer journey. I tested with the internal users and iterated based on the feedback.

I generated 3 different ideas for UI, but I had to follow company internal branding and patterns to create the high fidelity designs. Below are examples of refined output.



Learnings & UX ROI

In the whole process, I developed an eye for higher standards, fortitude to defend my design with data and logical reasoning. And I am super excited to say that APC is making a positive impact to the lives of our end customers.

In terms of accomplishments, we successfully launched it in November 2017. Now more than 50 users using this application and serving 500,000 users. The impact of the project reduced lot of friction between customers and internal user. And increased number customers opting for Annuities.



I have analyzed the data from business to know how many applications are being processed before and after APC, the moment I realized that the numbers increased to more than 250%, that moment was so precious I was so happy.

HARD WORK PAID OFF!