



TribeAgency defines a more usable intranet for Bankers Life and Casualty



Opportunity

Established in 1879, Bankers Life and Casualty Company is today one of the largest and most respected insurance companies in the United States focused exclusively on the needs of senior Americans. Bankers Life and Casualty Company is located in Chicago, Illinois, and licensed in every state and the District of Columbia except New York.

Bankers called upon TribeAgency to review their existing intranet site and make usability recommendations to assist Bankers personnel in conducting their daily business more efficiently, resulting in quicker application processing time, improved communication between agents, managers, administrators, and the Home Office, along with an overall increase in sales and decrease in business expenses.

Solutions

To launch the strategic process, TribeAgency recognized the need to gather and analyze feedback from Bankers personnel who interact with the BSPN site on a daily basis. TribeAgency's three pronged research approach began with telephone interviews of Bankers field personnel located in offices across the U.S. After establishing an initial overview of user impressions and frustrations, TribeAgency engaged in on-site office usability testing in three field offices. The bulk of TribeAgency's research focused on communications with agents, managers, and administrators. The research process culminated in the development and deployment of an online survey, reaching a large breadth of field personnel.

Market Outlook

In the insurance industry, agents are relying increasingly on technology to supplement their daily business accomplishments. While agents still focus predominately on face to face sales, it is important for them to have access to reporting tools, product information and marketing materials to serve their customer base. Since agents want to maximize their time working directly with clients, technology must be quick and convenient in order to be useful. Insurance companies want to provide their agents with as much support as possible, but they must find a way to empower agents with a wide range of technological skill, while avoiding interference with the sales process.



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