



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.



BANKERS LIFE AND CASUALTY USABILITY REVIEW .CASE STUDY



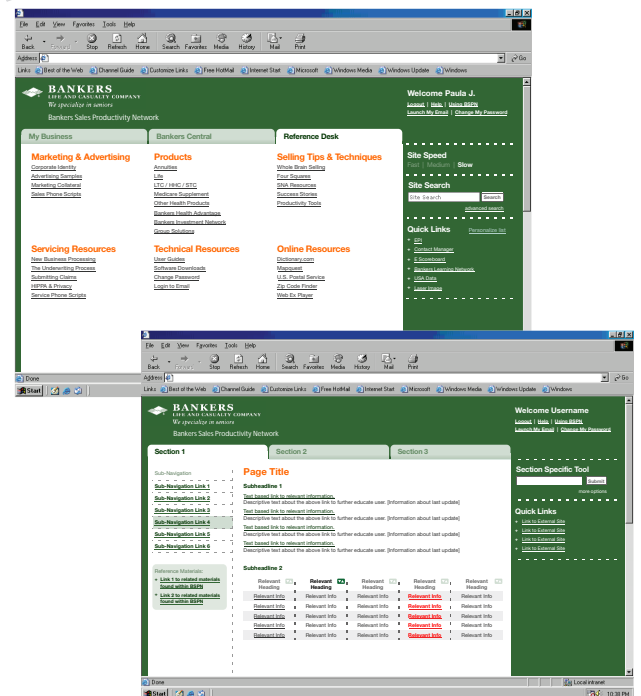
During the usability review presentation, **TribeAgency** provided documentation on all **architecture, functionality, and visual recommendations.**

Based on the feedback gathered from the usability testing, interviews, and online survey, TribeAgency created a written report offering suggestions for improvement of the existing site. TribeAgency extended the report to include “blue sky” suggestions, unencumbered by the possible limitations of Bankers technological capabilities. This creative “blue sky” thinking helped bring previously unimagined possibilities to the table, which stretched the role the intranet could play in agents and managers daily duties.

The recommendations led TribeAgency to rethink the organization of the site, constructing a new and more intuitive site architecture based on action items and the sales process. Using stack and flow chart documents, TribeAgency detailed out a new site organization which would accommodate all of the site’s existing information.

The final stage in the process involved putting a face onto the site architecture. TribeAgency’s creative team worked to make recommendations on how simple changes to the look and feel of the intranet could improve usability in significant ways. These recommendations included new layouts for report criteria pages, different site navigation areas, and regulations to standardize the treatment of like content across the entire site.

During the usability review presentation, TribeAgency provided documentation on all architecture, functionality, and visual recommendations. The documentation contained blueprint and wireframe documents of the site’s main sections, detailed diagrams to show user flow and functionality of new tools, and a complete written record of all findings throughout TribeAgency’s initial research phase.



Results

The Bankers team was very impressed with TribeAgency’s recommendations. After the final usability review presentation, Bankers was eager to begin the implementation stage based on TribeAgency’s suggestions. For implementation, Bankers will utilize TribeAgency’s consulting capabilities to ensure that the intranet meets the needs of Bankers personnel and leads to increased sales and cost savings.



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