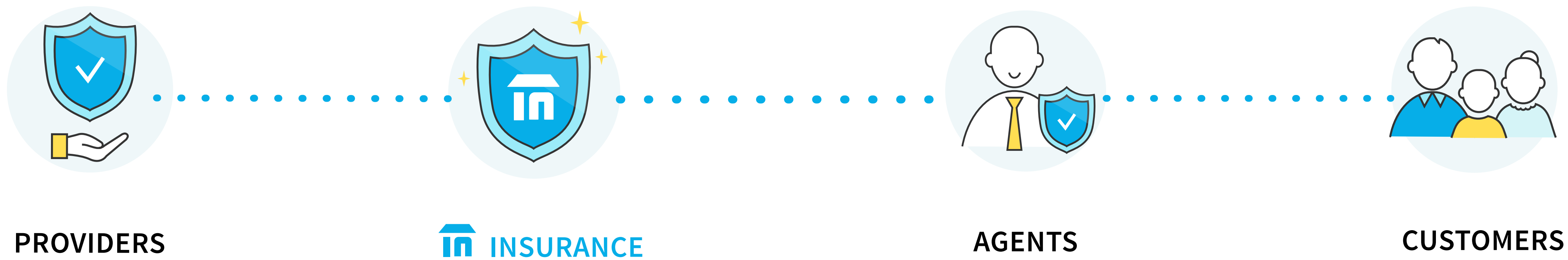




CLIENT BOOK

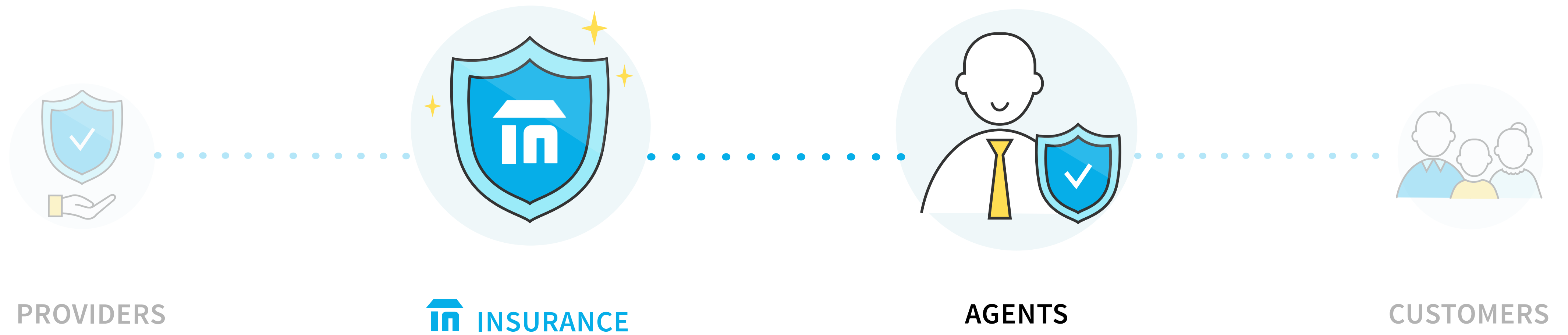
 **INSURANCE AGENCY LTD.**

As a young, ambitious and growing Chinese-Canadian insurance brokerage, In Insurance Agency Ltd. takes pride in its mission to foster the next generation of insurance brokers who will provide professional insurance consultation for the Chinese-speaking base here in the lower mainland.



THE INSURANCE NETWORK

In Insurance is apart of a larger insurance network that includes external agents, customers and providers. In working with agents, the two play an important role in the network to connect customers to insurance providers.



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THE INSURANCE PROCESS

In our research, we discovered the current insurance process between agents and the agency is made complex through an effort of trying to integrate three different file management systems into their workflow.



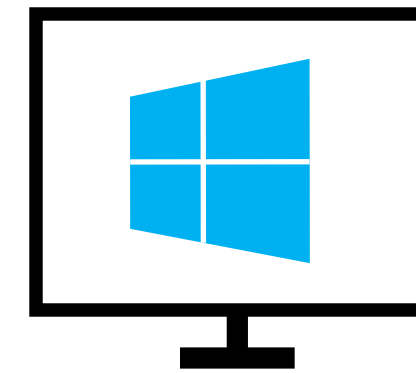
Wechat / Email System

Communication & transfer of files between agents and brokers



Physical File Management System

Agency's method of storing client information and documents



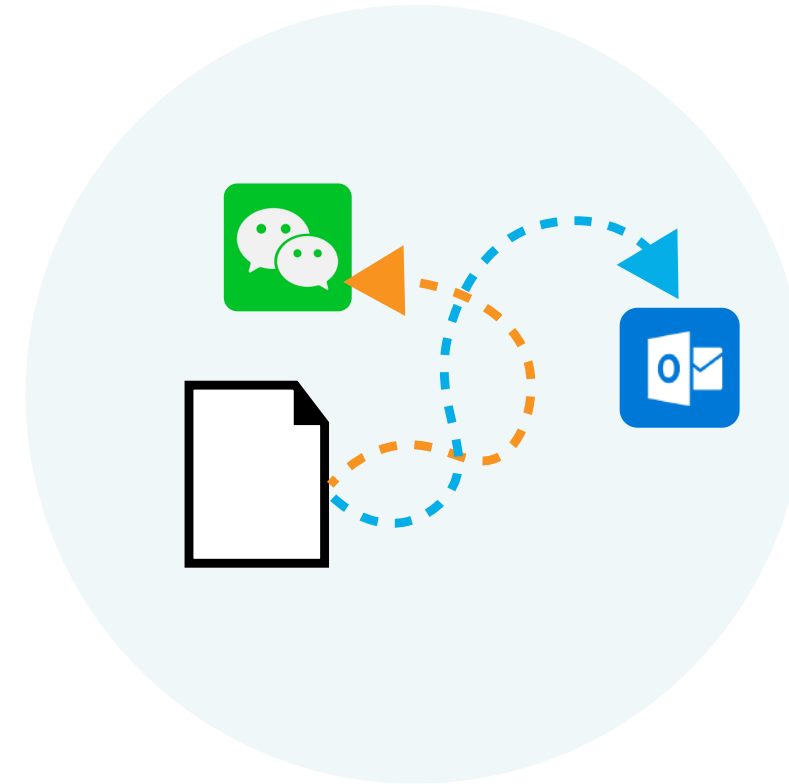
Windows File Management System

Personal method of storing client information and documents

PROBLEMS IDENTIFIED



Misplacement or lost of important files and documents



Messy process for the transfer of files between brokers and agents



Heavy reliance on personal behaviours for the organization of important client information

REFRAMING

How might we tighten the insurance network that In Insurance Agency Ltd. shares with its partners and clients?

REFRAMING

How might we mitigate some of the existing problems that lie in the agency and agent relationship and improve the interactions they share in the insurance consultation process?

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REFRAMING

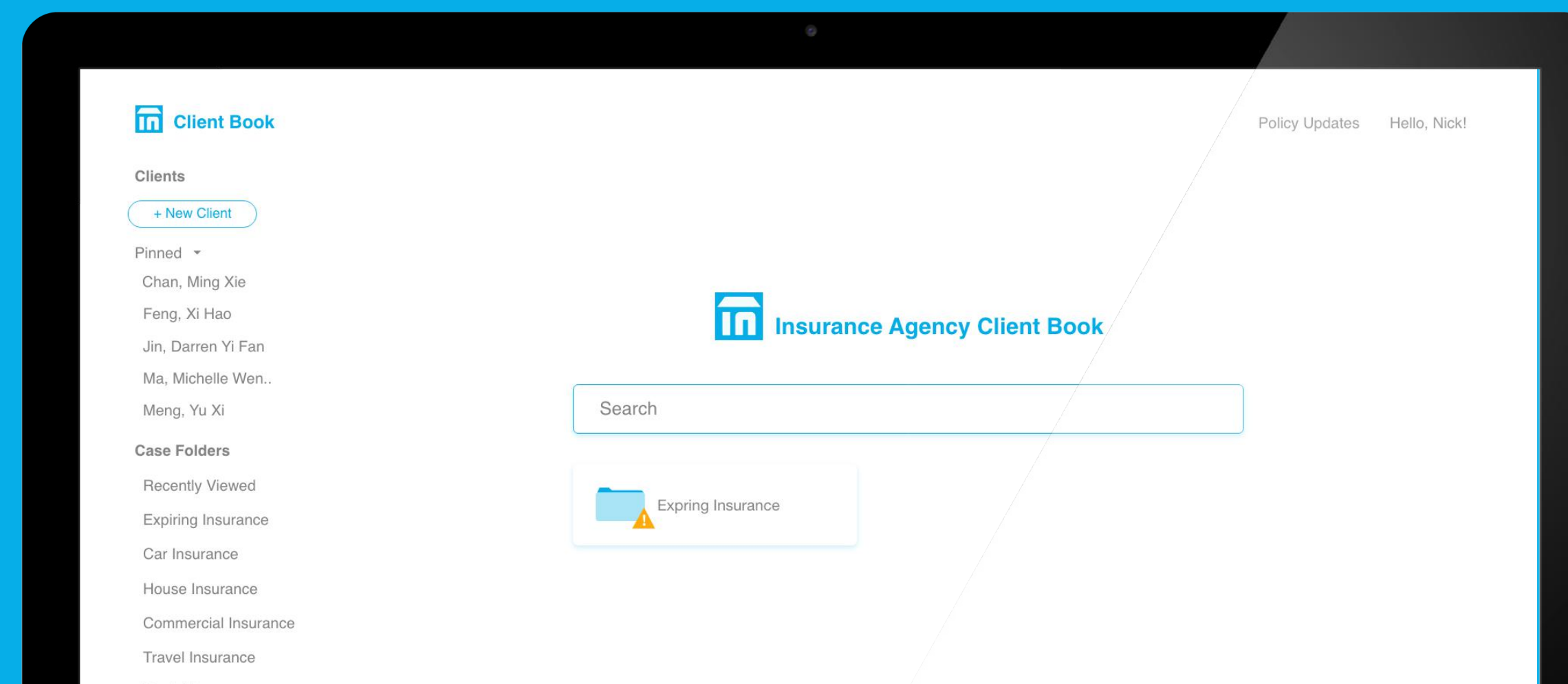
How might we utilize these findings to develop a viable, long term, and trust strengthening solution for the agency?

How might we tighten the insurance network that In Insurance Agency Ltd. shares with its partners and clients?

How might we mitigate some of the existing problems that lie in the agency and agent relationship and improve the interactions they share in the insurance consultation process?

CLIENT BOOK

An online cloud-based file organization system personalized for the agency to better manage of client information and files in a single centralized location while also providing a platform for collaboration with insurance agents and customers.

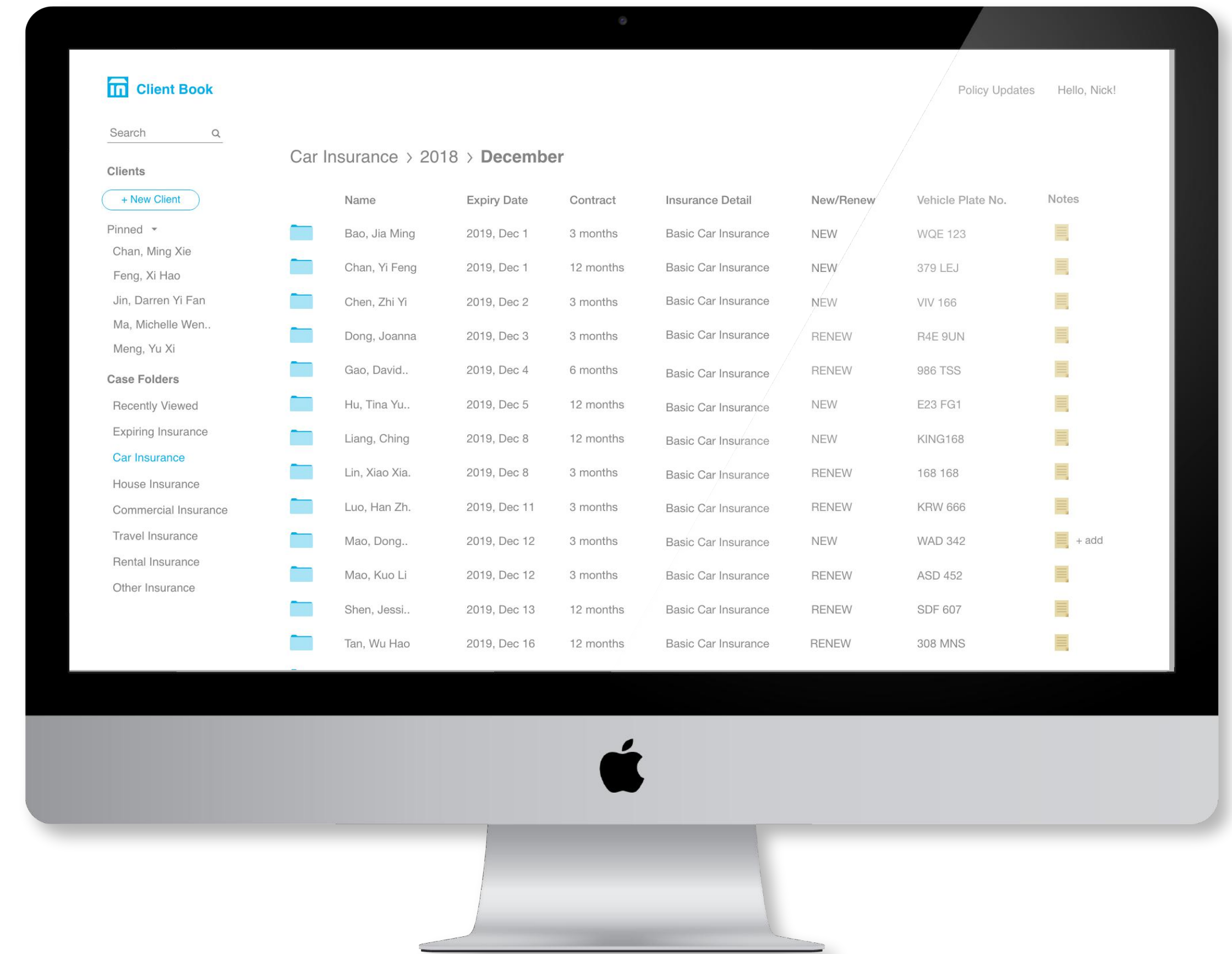


DESIGN CONSIDERATIONS

Mimic windows software for application so it is easy to use

“We use windows software to manage our files digitally because it is easy to use and it doesn’t require additional training for the brokers. Other application are too complex, for us as brokers, we only need to scan documents and file them in folders on our desktop”

— extracted from interview with **Micheal** (Manager at In Insurance)

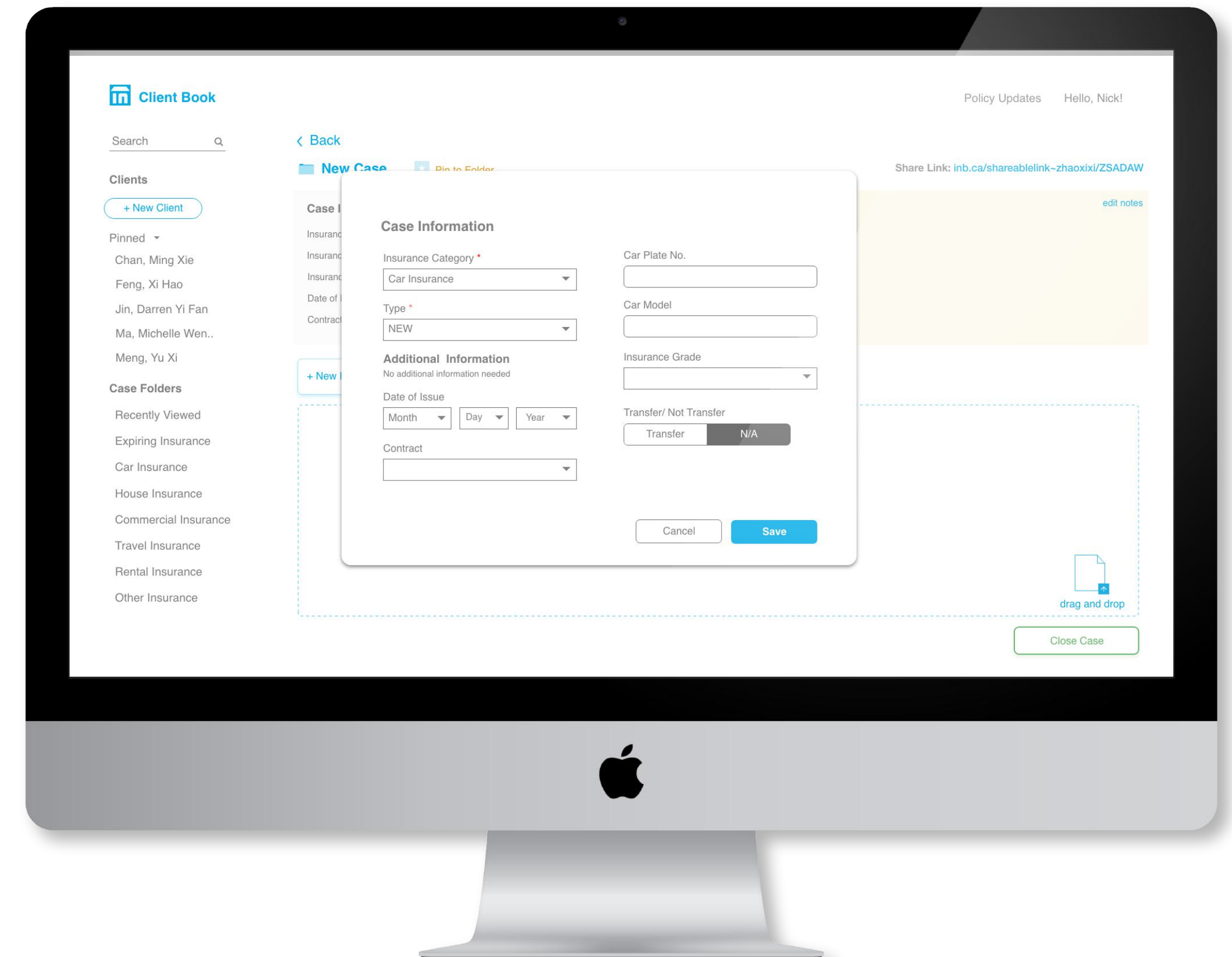


DESIGN CONSIDERATIONS

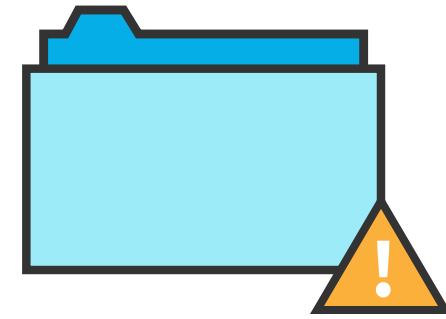
Flexibility in accommodating various insurance type

“In addition to insurance categories which also should include commercial insurance, there are also transfers and renewals which should be used to identify insurance cases”

— extracted from user tests of **Lauren & Travis** (brokers at In Insurance)

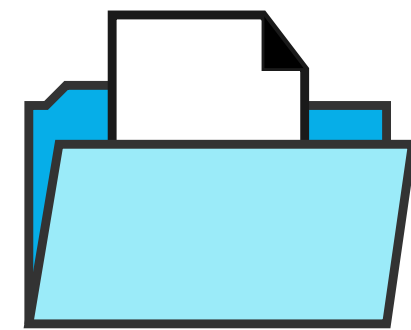


FEATURES



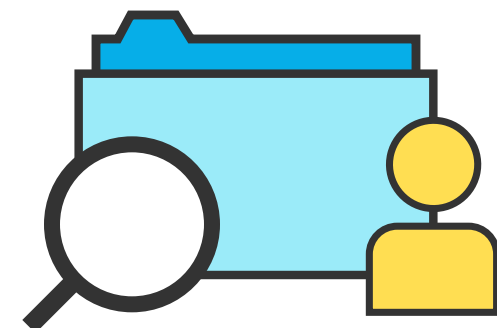
Expiring Cases Folder

Get notified and keep updated on upcoming expiring insurance



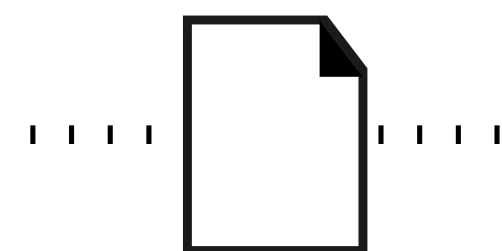
Automated Case Filing System

cases are automatically filed into folder based on their insurance category and expiring date



Search and Sort for Cases and Clients

Find a customer profile or case within the system quickly



Secure Network for Agents to Transfer Files

reduce the need to search for file by organizing the transfer of files into the system.

PITCH VIDEO



<https://youtu.be/7YtC6FcGdec>

FUTURE CONSIDERATIONS

With In Client Book, the connection between the agency and its primary clients is strengthened with a platform to build long term relationships with customers and better collaborate in the insurance process with agents. By providing a better file management and client documentation system for the agency, it utilizes technologic capabilities to solve the stresses of physical documentation and filing.