

IN INSURANCE AGENCY PARTICIPATORY WORKSHOPS

Redefined Design Problem

Strengthen relationships between In Insurance Agency and its clients (customers, agents, and insurance providers) by building long-term trust.

Participant Workshop Plan

Reflection Worksheet: two days prior to the workshop
“My Ideal Agent” Graphic Wall: at workshop
“My Ideal Day” Dice Story: at Workshop



IMMERSION REFLECTION WORKSHEET



MEMORIES + DREAMING + EXPRESSION “MY IDEAL AGENT” GRAPHIC WALL



MEMORIES + DREAMING + EXPRESSION “MY IDEAL DAY” DICE STORY

PURPOSE

This activity was proposed to get participants to **analyze and reflect on their day**.

METHOD

Participants were instructed to fill out a worksheet with six questions we created. The worksheet was given to participants **two days before our participant workshop**.

KEY INSIGHTS

- “Could not get documents back from clients”
- “Mis-communication between clients and brokers”
- “Rushing for the deadline, when there is not enough time”
- “Trying to help staff with issues on losing physical files”

RESULTS

From the feedback we received from the brokers' daily routine, most of them wrote that the **most challenging tasks** they have is **getting responses from clients or agents** to complete insurance requests. For the management team, the challenge they encountered was handling issues regarding the **misplacement or loss of physical files**.

PURPOSE

This activity was proposed to **identify the different characteristics** which brokers and customers look for in an agent.

METHOD

Participants were instructed to write their thoughts on **sticky note** and paste it on our ideal agent poster. Participants could also use the **suggested questions** we created to help them in their brainstorming.

KEY INSIGHTS

- “Has all info ready”
- “Good communication skills between clients and brokers”
- “Responds instantly”
- “Keep up to date on new policy or change in policy”
- “Personal touch and approachable, not too aggressive in selling”

RESULTS

Most of the customers expect that the ideal agents they will want to work with should have the **strong knowledge on insurance**. For brokers, they expect that the ideal agent to be active on **following up the process** between customers and agents.

PURPOSE

This activity was proposed to identify how **different factors play in the satisfaction** of our participants.

METHOD

Participants were instructed to **roll a 6-sided dice with a keyword on each of its side**. They were then instructed to use that keyword they rolled to **describe their ideal day**. We **recorded** their stories as they told it.

KEY INSIGHTS

- “Whenever agent calls in and they have all the info ready”
- “Documents have already been organized”
- “The broker staff asks for the phone number and email address of the client to follow up”
- “Less email to reply related to work”

RESULTS

By asking the brokers what is their ideal day at work like, basically all of the brokers who participate in the workshop mentioned that they wish the **information had been organized and prepared** to speed up their workflow.

