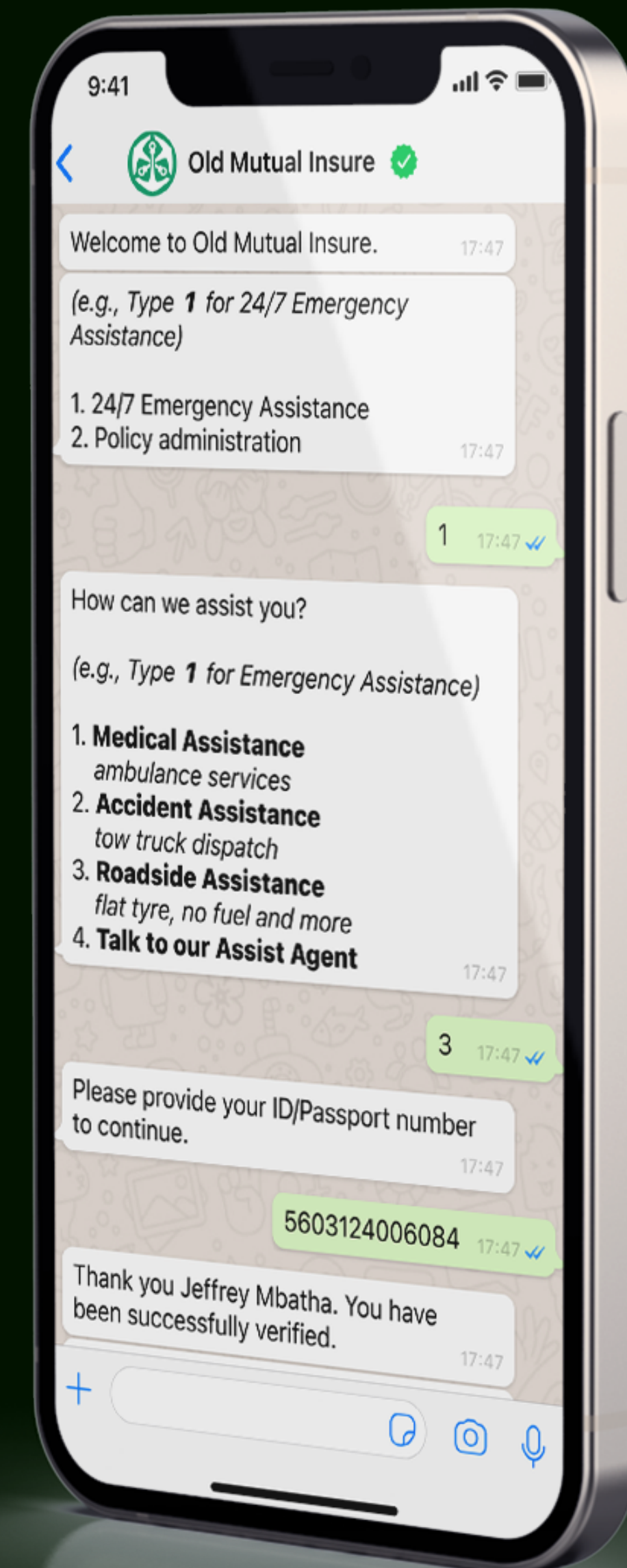


OMI WhatsApp Channel

Case Study: **When Design goes beyond what you see**

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Please Note: This case study is optimised for reading. If you can, have a cup of coffee to enjoy as you read.



Executive Summary

Problem Definition

Old Mutual Insure was looking to launch a WhatsApp channel to engage its customers and brokers. The main goal of the channel was to launch some features that already exist on other platforms onto WhatsApp. Despite going ahead with development, little research was done on how the introduction of this new channel could have an impact on customer experience. Along with that, user experience design was not done on the feature designs thus relying on business and developers to try to design these features themselves. Due to a lack of knowledge, there were no heuristic standards followed in the design of the features and the copy, no user goals clearly articulated, and interaction design not taken into consideration to ensure efficiency. Collaboration was also difficult to coordinate amongst stakeholders.

Impact On The Business

Despite having created basic designs for these features, the lack of research done on the customer experience and user experience was creating a risk that there would be a launch of a new platform with little knowledge of how customers and brokers would react to it. The solution risked not being user-centric, which potentially risked a bad user experience overall. Developers and business designing the solution themselves created back and forth of design without reaching finality thus delaying the launch of the channel. With little coordination of clear standards to follow and consider when designing the features, the experience in the WhatsApp channel risked being inconsistent amongst the features.

Solution

As the priority was to launch the channel as soon as possible, I negotiated that we start with conducting customer and user experience research in collaboration with the CX team while simultaneously working on the redesign of the existing chatbot features. The research focused on understanding current perceptions of the business by customers and brokers, and how the development of the WhatsApp channel would impact them. The redesign of existing features and new features focused on user-friendliness, conciseness, and clarity.

Toolkit & Activities

Toolkit Used

Microsoft Word — Recording requirements and insights from user interviews in Discovery. Working on the User story documentation with the Business Analyst.

Miro — Ideation, solutioning, Copywriting and walkthroughs with Stakeholders

Figma — Wireframing and prototyping of final solution mockup screens

Key Activities

Requirements Gathering

Approach

Competitor Analysis

Formulating a working agreement

Feature Planning

Interaction and Copy Design

Technical Walkthroughs

My Approach

I approached the project by following these steps:

Conducted customer and user experience research: I worked with the CX team to conduct research and understand the current perceptions of Old Mutual Insure by customers and brokers, and how the development of the WhatsApp channel would impact them.

Redesigned existing features: I redesigned the existing chatbot features to make them more user-friendly, concise, and clear.

Designed new features: Based on the research findings, I designed new features for the WhatsApp channel that were user-centric and met the needs of customers and brokers.

Engaged stakeholders: I engaged with stakeholders from different teams who owned different features on the platform, to ensure that everyone was aligned on the goals and objectives of the project.

Coordinated discussions: I facilitated discussions between developers and business to ensure that the designs were technically feasible and met the business requirements.

Set clear standards: I worked with the stakeholders to set clear standards for the design of the features, including heuristic standards, user goals, and interaction design.

Ensured consistency: I ensured that the experience in the WhatsApp channel was consistent amongst the features to provide a seamless experience to users.

By following these steps, I was able to ensure that the launch of the WhatsApp channel was user-centric and met the needs of customers and brokers.

Competitor Analysis

Activity Summary

As part of my research, I conducted a competitor analysis on insurance company chatbots. I was looking for the following:

1. **Features offered:** I analysed the features offered by the chatbots, including policy management, claim submissions, and customer support. I also looked at how these features were designed and how they impacted the user experience.
2. **User experience design:** I evaluated the user experience design of the chatbots, including the navigation, and accessibility. I also assessed the copywriting and how well the chatbots met the needs of customers and brokers.
3. **Customer and broker engagement:** I looked out for how the chatbots were used to engage customers and brokers, and if there was a difference in how they were addressed. To be honest, I could not find a chatbot that addressed brokers directly.
4. **Integration with other channels:** I looked at how the chatbots were integrated with other channels, such as websites, mobile apps, and call centers, and how this impacted the user experience, especially when a user was looking to complete a goal.
5. **Personalisation and customisation:** I analysed how the chatbots were personalised and customized to meet the needs of individual customers and brokers.
6. **Ease of use:** I assessed the ease of use of the chatbots, including the level of technical proficiency required and the availability of help and support in the event that a user got stuck.

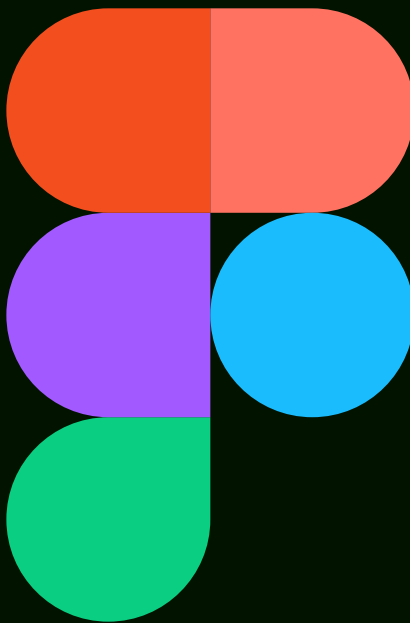
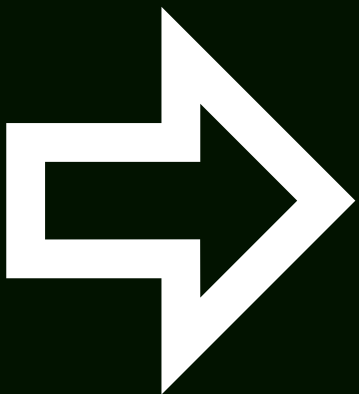
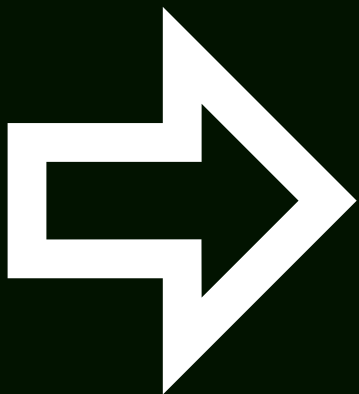
Key Takeout

By analysing these aspects of insurance company chatbots, I was able to gain a deeper understanding of how brokers and customers were catered for and identify best practices and areas for improvement in the design of the WhatsApp channel. Key to highlight though is that I found it difficult to continue in journeys that required policies.

Formulating a Working Agreement

Understanding how the team works for context

Previously, stakeholders were designing the WhatsApp chatbot flows on Figma, but this process was **inefficient** because any design change would require **multiple screen updates**. Given the tight timelines, my aim to find a more **efficient collaboration methods**. I worked with my business analyst and technical lead to come up with a new approach. We agreed to use **Miro** for ideating, designing the flows and iterating, and then documenting them in a user story format for sign-off. This **streamlined the design process**, as changes could be made in one place, and only the final approved user story document would need to be updated. This new approach improved collaboration, **reduced errors**, and allowed us to meet our tight deadlines. Only once designs finalised would they put onto Figma as a mockup for demonstration and testing.



Collaboration
Ideation
Technical Walkthroughs
Iterations

User story documentation
Stakeholder sign-off

Mockups
Prototype
User testing

Formulating a Working Agreement

Understanding individual needs is key to success

Working with my business analyst and technical lead was key to the success of this project. I recognized that their perspectives were different and that each had their own priorities. I made it a point to understand what each of them was concerned about, and then incorporated their concerns into the working agreement.

The technical lead was most concerned about minimizing errors in the design process. They wanted to ensure that the designs were technically sound and would not require extensive revisions or updates later on. To address this concern, I emphasized the importance of clear communication and collaboration between all stakeholders, and ensured that the design process was well-documented and reviewed regularly as well as ensuring that there was accurate versioning on the Miro board.

The business analyst was focused on meeting the requirements set out by the stakeholders. They wanted to ensure that the designs met the goals and objectives of the project, and that the end result would be in line with the expectations of the stakeholders. To address this concern, I engaged in regular meetings with the business analyst and worked closely with them to ensure that the requirements were being met throughout the design process.

For me, the most important thing was ease of collaboration and putting the user's needs at the center of all designs. I wanted to ensure that all stakeholders were on the same page and that the design process was as seamless and efficient as possible. I brought my design expertise to the table and worked closely with the business analyst and technical lead to ensure that the designs were user-centric and met all the requirements. In the end, our collaborative approach allowed us to launch the WhatsApp channel efficiently and with a strong focus on the user experience.

Feature Planning

Joining a moving train and trying to influence its direction

When I joined the team, the project was already underway, but there was a lack of clarity around the roadmap for the WhatsApp features. Stakeholders had differing expectations about which features should be prioritised and when they should be launched, and there was growing frustration about the slow pace of development.

My goal was to bring a sense of order and structure to the project so I could be effective in my role as a designer. I aimed to create a clear roadmap for the WhatsApp features and prioritise the most important ones so that we could focus our efforts and time effectively. To achieve this, I engaged with the stakeholders to understand their expectations and priorities, and worked closely with the development team to assess the feasibility of each feature. Through this collaborative effort, I was able to ensure that the project was moving in the right direction and that the most essential features were given the attention they deserved.

A good track record creates trust and better collaboration

As a result of the careful planning and improved collaboration, we were able to deliver the features much more quickly than expected. The increased pace was met with great satisfaction from the technical lead, business analyst, and other stakeholders, who were used to the slower pace. This, in turn, further improved collaboration within the team, as everyone was working together more effectively towards a common goal.

The perception of the team also changed dramatically. We were no longer seen as the slow-moving, inefficient group that we had been before. Instead, we were now viewed as a highly productive, effective team that was capable of delivering high-quality results quickly and efficiently. This improved perception of the team created a positive feedback loop, as stakeholders became more and more confident in our ability to deliver, leading to even greater collaboration and even more impressive results.

Interaction and Copy Design

Adapting my skills as a UX designer to copy design

As a UX designer, I was already familiar with creating visually appealing and user-friendly interfaces. I **applied my experience to designing copy** for a chatbot by considering the tone and language that would resonate with the audience, which in this case were customers and brokers of an insurance company. I understood that the users would be engaging with the insurance company to perform administrative tasks, to address problems, or to reduce risk, making **insurance a "grudge purchase"** for them. This meant that their mental model while using the platform was centered around efficiency, as they wanted to complete their tasks as quickly as possible.

When it came to designing the copy for the chatbot, I faced the challenge of combining the technical aspects of **interaction design** with the flows and copy. My approach was to clearly **map out the user's goals** for each flow and prioritise them. I then applied usability principles to ensure that the chatbot was **user-friendly** and efficient in achieving its intended purpose.

One of the key principles I applied was **clarity**. I made sure that the language used in the chatbot was straightforward and easy for users to understand. This involved choosing concise language, **avoiding technical jargon**, and ensuring that the information presented was relevant to the **user's needs**.

Another principle I applied was **consistency**. I made sure that the overall experience of the chatbot was consistent, with similar language and interaction patterns used throughout. This helps users to quickly understand how to use the chatbot and feel confident in their interactions with it.

I also paid close attention to the **flow of the conversation** in the chatbot. I made sure that the flow was logical and easy to follow, taking into consideration the order in which users would expect to receive information and interact with the chatbot.

Finally, I made sure that the chatbot was **accessible and usable** by a wide range of users. This involved considering factors such as the chatbot's responsiveness, readability, and the use of accessible language.

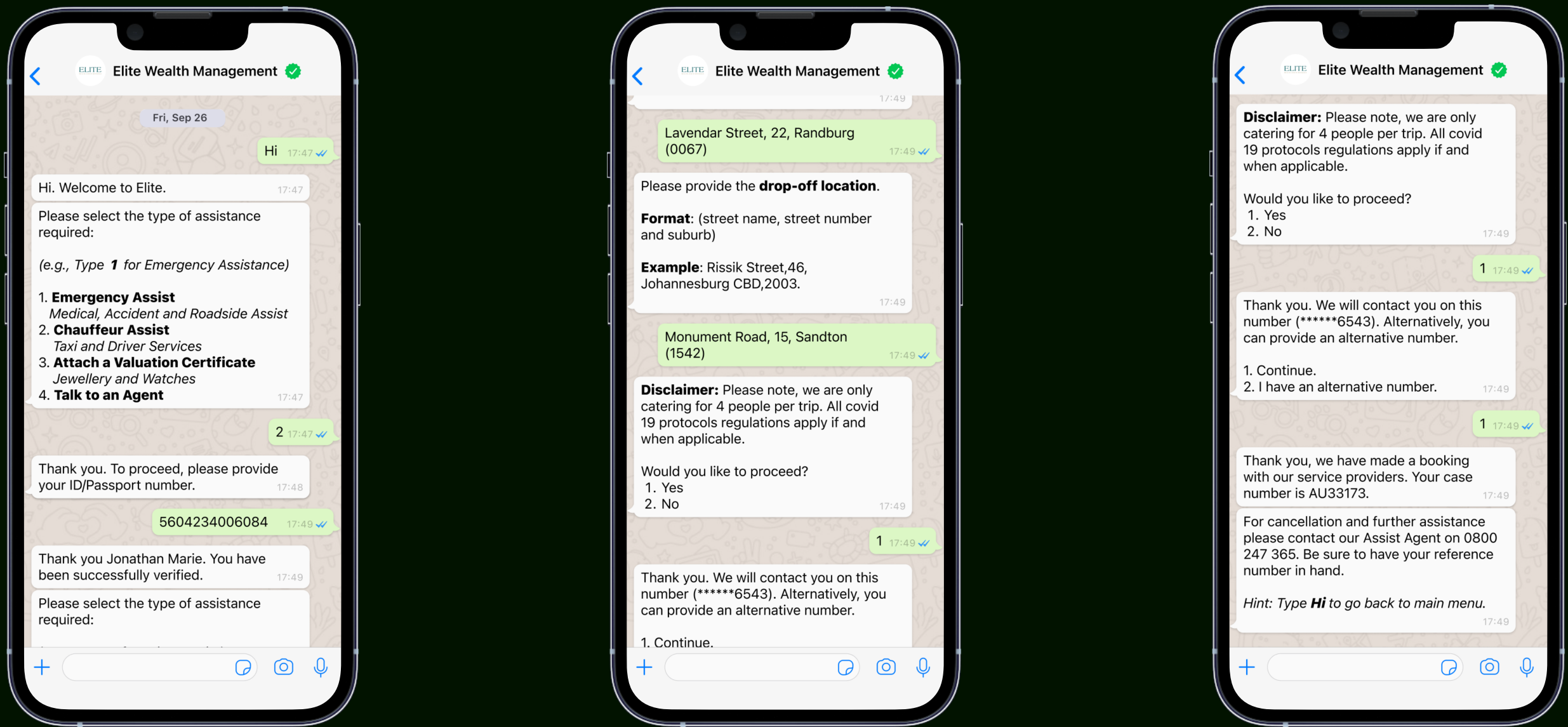
By applying these usability principles, I was able to design a chatbot that was user-friendly and efficient in achieving its intended goals. This helped to improve the overall experience of using the chatbot and **increased user satisfaction**.

Interaction and Copy Design

Keeping in mind that insurance is a grudge purchase

When designing the copy for a chatbot for an insurance company, it was important to keep in mind the nature of the audience's engagement with the company. Insurance is often viewed as a grudge purchase, meaning that people typically only engage with insurance companies when they are in trouble or need to complete administrative tasks. Given this, it was crucial to optimize the chatbot's copy for clarity and succinctness, as the satisfaction of the user was closely tied to their ability to efficiently complete their desired task.

To achieve this, I applied principles of interaction design to the design of the chatbot's flows and copy. This involved mapping out the specific goals that the user had to achieve, and prioritising these goals to ensure that they were addressed in the most effective way. Additionally, I considered the mental model of the user and the fact that they are engaging with an insurance company under less-than-ideal circumstances. This required me to use language that was clear, concise, and empathetic, while still communicating the necessary information efficiently. By doing so, I aimed to create a chatbot experience that was as smooth and stress-free as possible for the user.



Interaction and Copy Design

Relating designing screen-based and text-based interactions

Designing copy for a chatbot can be a challenge compared to traditional screen designs. Unlike screen designs, **chatbots rely heavily on text-based interactions** with the user, making it crucial to communicate information clearly and efficiently. Each message in a chatbot serves as its own "screen," with its own set of **affordances and signifiers** that the user needs to understand. This means that I would need to think carefully about how I can use **visual cues within the text** to clearly communicate the available actions to the user.

As a designer, I realised that I had to approach the design of chatbot copy differently compared to screen designs. **Instead of relying on traditional visual elements**, I needed to make use of **alternative techniques** to make the affordances clear to the user. This is where my learnings from **human-computer interaction design** became useful. I decided to use bolding, italics, and spacing as visual cues and guides to help convey the necessary information in a clear and concise manner.

Step 2 of 2:

Please enter your **FAIS number** for confirmation.

17:49

Example: I would **bold the main affordance** in each message so that users could quickly see what action they could take at a glance. Internal testing showed that this not only improved the overall user experience but also helped to **prevent errors**.

Please send your valuation certificate for upload.

Format: jpeg/png/pdf

Please note: *You can only attach one certificate at a time. If you have more than one certificate, you will be able to attach them in the next steps.*

17:49

Example: I would add **help text** in messages where there could be a possibility that a user may take action that would cause a system error or where there is a possibility of confusion about what is required of them.

Technical Walkthroughs

When designing for technical constraints, be ready to learn

As a designer, my primary focus was on creating a seamless user experience for the chatbot. However, I soon realized that the design of the chatbot was heavily influenced by the technical landscape of the organisation. The chatbot, which may seem simple on the front-end, in reality, relies on a number of services and APIs within the company's technical infrastructure. This posed a significant challenge for me as a designer and put constraints on the design.

To overcome these challenges, I knew I had to step out of my comfort zone and learn more about the technical aspects of the chatbot. I worked closely with the developers and learned about APIs, services, and how they impacted my designs. For instance, I learned that certain services had to be called before others could be used. This required me to show a willingness to learn, develop a working relationship with the developers, and understand how they approached the technical development of the chatbot. A lot of these constraints would be apparent when sitting down with the developers to assess the feasibility of the designs. I would then iterate on designs based on the feedback and new learning gained from technical session.

I also used these sessions to help the developers understand my design decisions from an experience point of view, which would then prompt them to try to find other ways of achieving goals when the processes would be frustrating to user goals. My willingness to learn was reciprocated by the developers in that they would be willing to compromise and find different ways of developing the chatbot to be optimised for user goals.

Through this collaboration and learning process, I was able to develop a better understanding of the technical landscape of the organisation and adapt my designs accordingly. This allowed me to create flows and copy that were optimised for the technical constraints, while still providing a seamless and efficient user experience.

In conclusion

Being a designer goes beyond what people will see

In conclusion, my experience as a designer in the development of a chatbot for an insurance company was eye-opening and highly educational. I quickly learned that the design of a chatbot was not only about creating visually appealing user experiences, but it was also about understanding the technical constraints that came with the development of such a project. My role as a designer went beyond just designing, as I had to collaborate with my business analyst and technical lead to create a more efficient and effective process that would ensure all stakeholders' needs were met. This involved negotiation and learning about the inner workings of APIs and their impact on the design.

The team improved significantly after I joined, as I brought a fresh perspective and a willingness to learn. I was able to help the team come up with a clear roadmap for the development of the chatbot and prioritize the features based on their importance. The newly adopted processes and tools, such as using Miro for collaboration and user story documents for sign-off, greatly improved the speed of development and led to increased satisfaction among the stakeholders. The perception of the team changed from being slow-paced to a well-oiled machine that could deliver features quicker than expected.

In summary, my experience as a designer in the development of a chatbot for an insurance company showed me that a designer's job is not just limited to designing but also involves collaboration, learning, and adapting to the technical constraints of the project.

I hope there is still some coffee left in your cup, but this is the end.

Thank you for your time.

