



# Insurance Exchange Platform

A UX/UI case study by **Kesava Rao** — Senior UX/UI Designer with 10+ years of experience designing complex B2B SaaS products that simplify decisions and drive real business outcomes.

B2B SAAS

UX CASE STUDY

INSURTECH

# The Problem: A Fragmented Workflow

Insurance agents juggle multiple disconnected tools — one for leads, another for providers, another for communication. This fragmentation creates three critical breakdowns:

## Lost Leads

Delayed follow-ups cause prospects to fall through the cracks

## Provider Confusion

No easy way to compare providers, products, or performance

## Blind Pipeline

Zero visibility into performance metrics or deal progress

📌 **Design Challenge:** How might we create a unified platform that helps agents make faster decisions and close more deals?



# Users & Context



## Who Are We Designing For?

Agents need **quick access to data**, clear next steps, and minimal cognitive load. Every design decision was grounded in reducing friction for this core user.

1

### Insurance Agents

Primary users — busy, multitasking, and data-driven

2

### Sales Managers

Secondary users — monitoring team performance and pipeline

3

### Admin Teams

Tertiary users — managing accounts and compliance

# My Role & Design Approach

## Responsibilities

### End-to-End UX

From discovery through delivery

### Information Architecture

Structuring complex data hierarchies

### Interaction Design

Micro-interactions and actionable flows

### UI System Design

Scalable, consistent component library

## Structured Design Process



Understand  
Goals

Map  
Workflows

Find Friction

Design  
Solutions

Closely aligned with stakeholders throughout to ensure business goals and user needs moved in the same direction.

# Key UX Challenges

Three interconnected challenges shaped every design decision made in this project.

## Information Overload

Agents process enormous volumes of data – providers, quotes, customers, and performance metrics – all simultaneously. The interface needed to surface the right information at the right moment without overwhelming the user.

## Decision Complexity

Comparing insurance providers across products, ratings, and pricing is inherently complex. The design needed to reduce cognitive effort and make comparison feel intuitive, not exhausting.

## Workflow Fragmentation

Communication, tracking, and conversion actions lived in separate systems. Agents lost context switching between tools – unifying these into one cohesive flow was essential.

# Solution: A Modular Dashboard System

To address all three challenges, I designed a **unified, modular platform** — four tightly integrated modules, each solving a distinct workflow problem.



## Dashboard

Real-time insights & performance metrics



## Quotes Management

Stage-based pipeline from lead to closure



## Providers

Centralized comparison & decision-making



## Contact Center

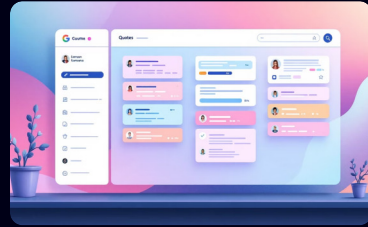
Unified communication & follow-up tracking

# Module Walkthrough



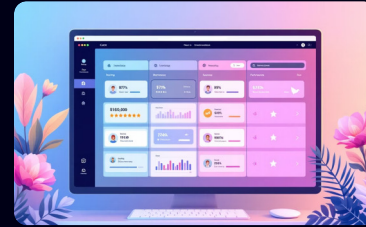
## Dashboard — Instant Visibility

Key metrics like transactions, volume, and sales surface at the top. Visualizations help agents identify trends at a glance, **reducing decision time dramatically.**



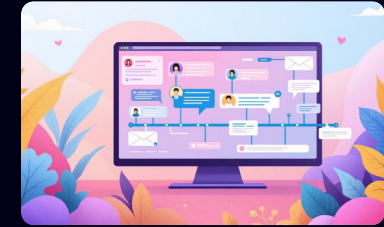
## Quotes — Pipeline Control

A stage-based pipeline moves leads from inquiry to closure. Each card carries actionable insights so agents can **prioritize and act immediately.**



## Providers — Smarter Decisions

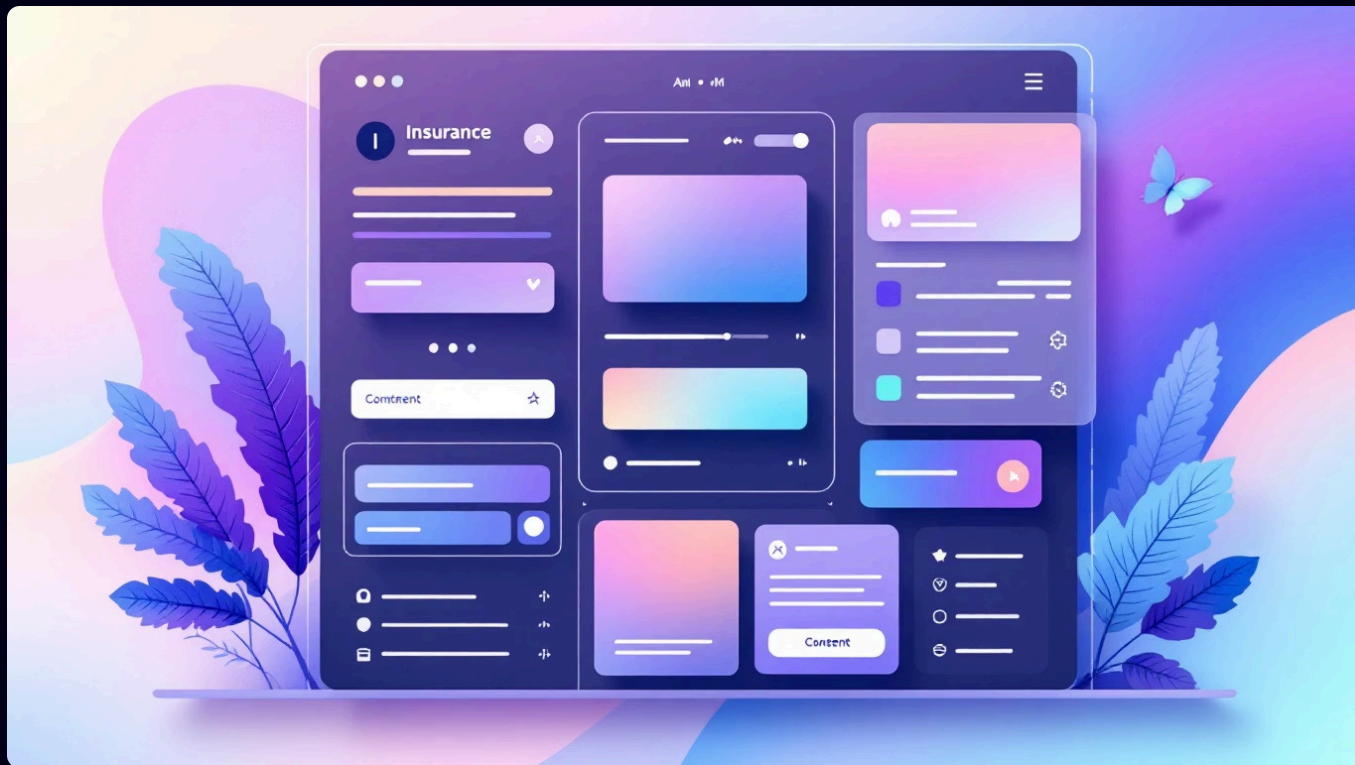
All provider data is centralized — ratings, performance, product types. No more tool-switching. Agents **compare and decide faster**, with less cognitive fatigue.



## Contact Center — No Lead Left Behind

A timeline-based communication log with quick-action buttons. Agents respond instantly and **every follow-up is tracked**, ensuring nothing is missed.

# Key Design Decisions



## Principles Behind Every Choice

### → Card-Based Layouts

Chunked information into scannable cards – reducing time to locate key data and supporting faster decisions

### → Clear Visual Hierarchy

Typography, color, and spacing guide agents to the most critical actions without cognitive strain

### → Actionable Insights First

Prioritized *what to do next* over raw data – every screen surfaces a clear next action

### → Cross-Module Consistency

A unified design system ensures agents feel at home in every module, reducing learning curve

# Impact & Future Vision

## Projected Outcomes

~30%

### Fewer Follow-up Delays

Through unified communication tracking



### Conversion Rates

Quote-to-policy improvement via pipeline clarity

1x

### Unified Workflow

All tools consolidated into a single platform

## If I Had More Time...

These enhancements would push the platform even further:

- **AI-driven insights** — Predictive recommendations based on agent behavior and historical performance
- **Automated follow-ups** — Smart triggers to eliminate manual tasks and reduce drop-off
- **Personalized dashboards** — Adaptive views that evolve with each agent's priorities and workflow patterns



# Thank You

This project demonstrates my ability to **navigate complexity, design for real business impact**, and balance user needs with organizational goals — end to end.

## Complex Systems

Designed at scale for B2B SaaS environments

## Business Impact

Every decision tied to measurable outcomes

## User-Centered

Always anchored in real agent needs and workflows

*I'd be happy to walk deeper into any module, design decision, or process. Let's talk.*