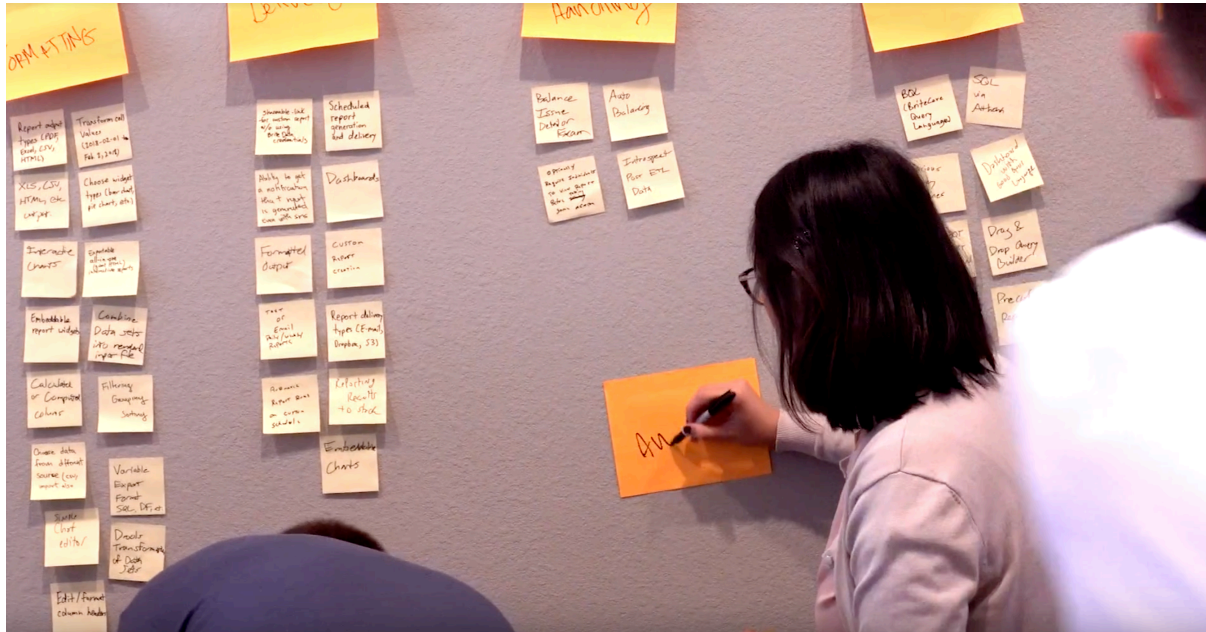**Product Development Summit**

# BriteCore Design Ideation Sessions

Overview

Last week, the product development teams came together in Springfield for a multiple day "Product Development Summit". Multiple teams presented what they were working on. As part of this event, the Design Team put on a wide-ranging ideation session, where we brainstormed features for 4 new modules, including:

- **BriteClaims** - Rebuilt claims module, which is already underway.

- **BriteTasks** - Will allow users to assign and complete work items.

- **BriteData** - Reporting module with a focus on running reports faster.

- **BriteQuote** - A new quoting interface being built to support our more flexible lines rating engine.

BriteClaims – Rose, Thorn & Bud   By Mac McCormick
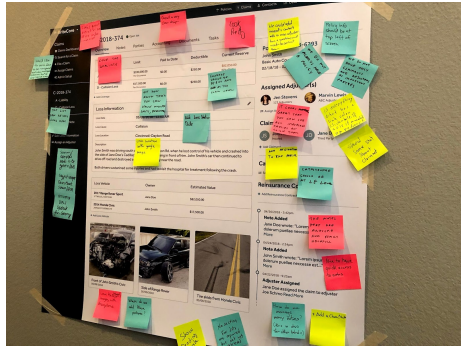
For the BriteClaims session, we tested one of our in-progress mockups using a design methodology called Rose, Thorn & Bud. This tool provides a framework to give feedback on a design by labeling each comment as something positive *(rose, pink post-its)*, something negative *(thorn, blue post-its)* or something where an opportunity exists *(bud, green post-its)*.

And here is an image of the design without notes, so you can see it:

Roses - Common Themes

A few patterns emerged in reference to positive feedback participants had.

Enthusiasm for the aesthetic

There were a handful of positive references to the look and feel of the design. A few words used commonly were "Clean" "Simple" and "Pretty". This lets us know that simply updating the interface visually already adds value.

Visuals

The photos, colors, UI elements, etc. were called our various times as a positive aspect of the design. Having both data about the loss and visuals representing the loss will make our module more inclusive for users with various learning and comprehension styles

Activity Feed

The activity feed in the bottom right of the design was also seen positively by a handful of different participants.

Thorns - Common Themes

Patterns also arose around the negative aspects of the design.

Flexibility

Many thorns were associated with questions of, "What If?" The design will need to be flexible enough to handle the simplest claim and also the most complex claim. Participants noted that some of the components on the page wouldn't scale well at the most complex levels, leading us to continue thinking through how to achieve that flexibility while still retaining a clean aesthetic and usability.

Data Misplaced / Missing

Another thorn that came up was the placement of certain pieces of data. The question of where to put different pieces of data and where they will be actionable is going to be a key consideration as we continue to design.

Data Density

We had some thorns complaining that there was too little data displayed and some stating there was too much. This goes back to the flexibility idea. We want this design to have the right amount of data for each user.

Actions

There was confusion about where each action would take place and how those actions need to be prioritized. We can continue to discuss with our users what the most important actions they need to do are and how they prefer to do them to better address this issue.

Buds - Common Themes

There were also a handful of different opportunities we could explore.

More Visuals

The participants responded positively to most of the visual representations we included and suggested more such as a map for the loss location, visual representation of the loss and other ways to display more images.

Educational Aspects

Other participants suggested using some kind of hover actions or tooltips to better educate users on different parts of a claim they are looking at.

Handling Data

Participants also had a few other suggestions to how we could handle data such as using "Read More" links in more places or utilizing Markdown for formatting.

Additional Resources

[Raw Result Spreadsheet](#)

BriteTasks – Concept Poster By Tyler Lindo
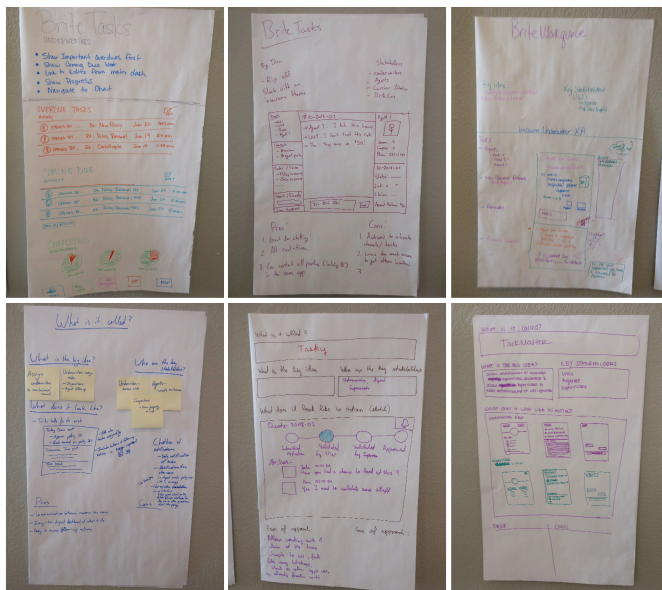
Concept posters are a fun way to generate visual representations of ideas stakeholders might have for projects. The activity helps ensure that everyone has a chance to share their thoughts in a clear way. It can also help foster discussion around different approaches, gain buy in from decision makers, and form a clearer path moving forward.

At the summit, each participant created a concept poster for BriteTasks, and they had to create their concept as a "Chat App". Once the posters were complete, participants shared them with the group and had 30 seconds to pitch their idea.

Common Poster Themes

Inline Actions

Tasks can be worked on directly from a central dashboard. For example, if a task pops up in a list or chat window, the user is given enough context to know what it is, it's state and what needs to be done. This approach helps keep users in context, eliminating the need to navigate between separate pages to complete one task.
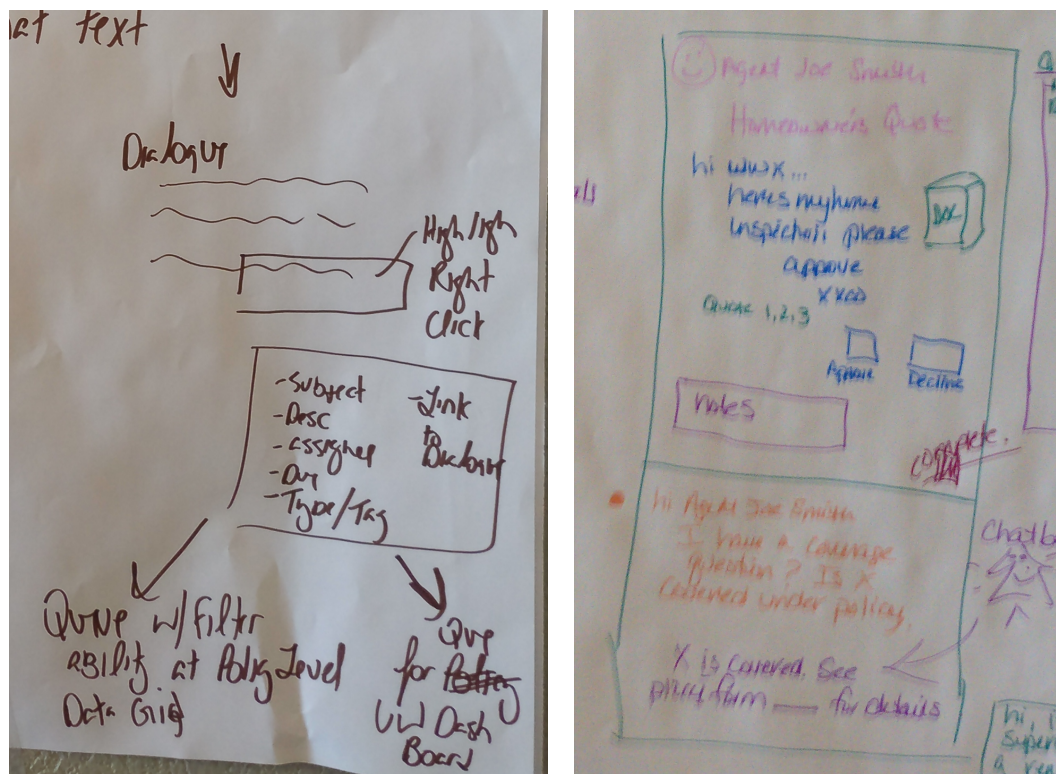
Automation

Workflows such as renewals could be surfaced in a timely manner and streamlined with underlying logic. For example, Credit scores, Google images, reports, loss history could all be pulled into one document for review, eliminating manual hunting and sorting that happens now.
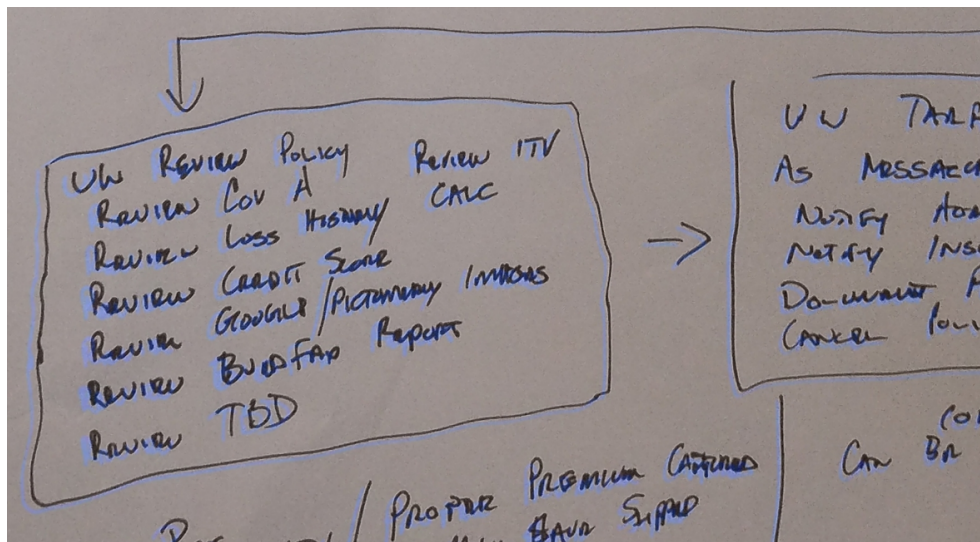
Conversational commands & chat bots

Instead of routing through reports and policies to understand what needs to be done, a simple question could be posed to the system. The system would then immediately response with relevant information – in this example, surfacing urgent tasks. These conversational commands could also port well to voice-only services like Alexa and Google Assistant.
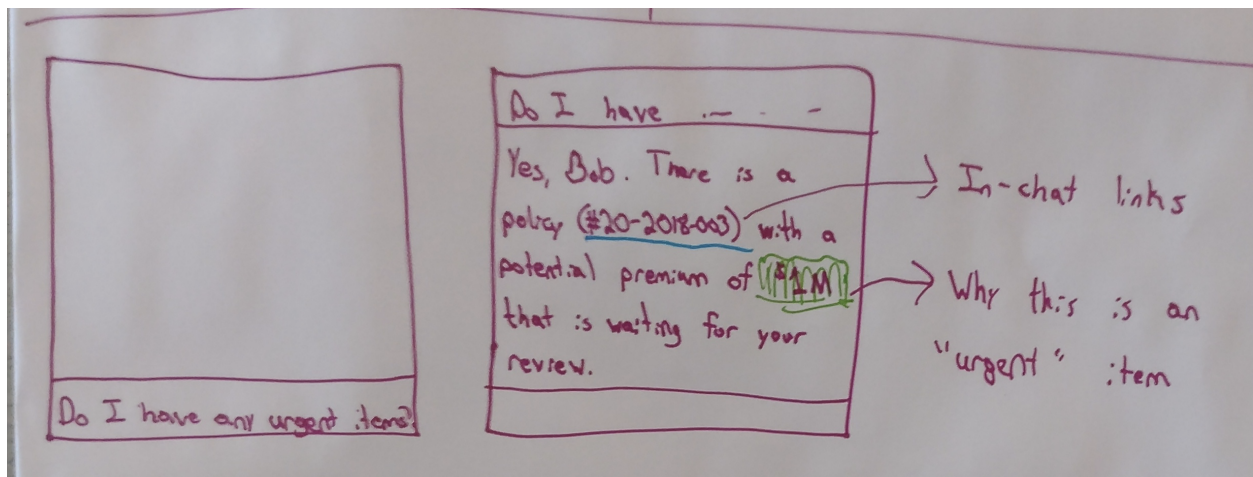
Additional Resources

In total, around **30 posters were created by the PD team** in the span of 2 hours!

BriteData – Affinity Mapping   By Jessica Sunga

Affinity Mapping is a technique that helps take large amounts of data and discovers any natural connections between them. To do this, each person generated as many ideas as they could, and then spent time trying to create groupings between them.
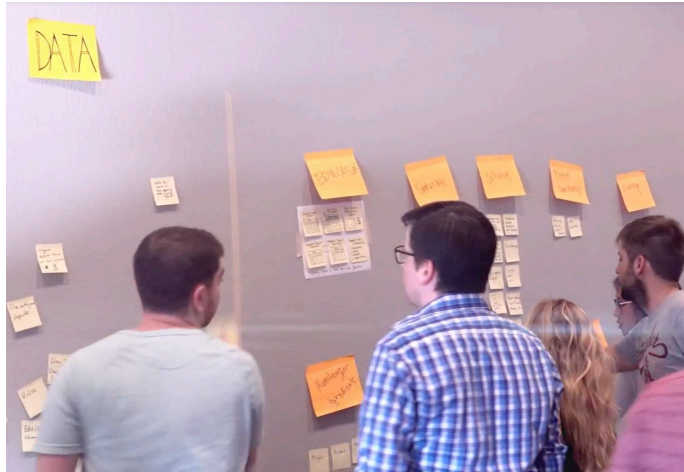
Key Findings

Groupings: An insight to how people understood their ideas
It was interesting to watch as each session grouped their ideas, and it gave us insight into how people thought about and communicated them. While the categories differed from group to group, there were some common themes. We can interpret these to be important items to hit for making a successful product:

- External Sources
- Analytics
- Error Handling
- Visualizations
- Reports

Other groups were only listed once, but still remain highly relevant. Most of these suggestions came from people with more in-depth knowledge of improving speed and efficiency of the system:

- Business Intelligence
- Query
- Automation
- Optimization
- Realtime
- Machine Learning
- Formatting

Finally, these categories were unique groupings, and something that could be further entertained to improve the product, so that users with little in-depth data and report knowledge can use it effectively:

- Education
- Client Reporting Services

Individual Ideas: Major Insights

The first takeaway from this ideation session was how much more I learned about the data project from other people, as different groups offered insights and ideas based on their expertise. Each idea reflected someone's role in company – something that is valuable as a designer trying to merge different perspectives to accurately communicate and present ideas.

Other takeaways are related more to the product. I provided at least 5 ideas generated from the sessions to the general insights. Some ideas gave specific insights into what the product should offer, so they will be interesting to think of during the design process.

Using External Data Sources

Every client utilizes their own set of tools and workflows in order to get the job done. Thinking about including and integrating many external sources should help make BriteCore a top consideration in the user's workflow:

1. External Data Sources (APIs, databases, files in s3)
2. More flexibility in data choices
3. Support excel formulas
4. Pull in data from third parties
5. Connections to popular visualization/report software (ex: PowerBI)
6. Extensible delivery protocol with several common options

Analytics, and Analysis

Giving users the insight right into their data, without the hassle of creating it, will help them make more informed decisions for their business. *Note: Some sessions specifically labeled analysis as both interactive and predictive analysis.*

1. Auto-suggest relevant graphic format for selected data point (pie chart vs. bar chart)
2. Competitive analysis between last week/month/year through graphs
3. Identify weaknesses/strengths
4. Predict ideal rates
5. Next best action
6. Categorize data so that in the future it will be easier to build statistical modeling
7. Automated agent loss reports — Identify agents writing bad business

Report Building

There are big pain points and user needs in regards to the current BriteData and Reports interface. Some ideas generated for user experience and user interface will hit on existing problems while others extend the functionality and features.

1. Suggest related data points to the ones being used
2. Auto-save
3. Preview report before downloading
4. Explain how users can filter data to make it more insurance-user friendly
5. Allow users to create dashboards with drag and drop tools
6. Have ability to set defaults so report generated has one-click access
7. Quick action buttons— such as "Run Report" or "Export Results"
8. Shareable online reports
9. Data discovery – "What data do I have available?"


Data Automation

Realtime data and automation are key features to think about in order to help improve efficiency and to help handle a lot of data.

1. Auto generate a report with selected data points and the user can just drag and drop
2. Automatic report runs and custom schedule
3. Continuous data generation
4. Realtime error notification

5. Notifications and insights based on newly created data
6. Text or email daily/weekly reports

Additional Resources

For a more in-depth look into all of the great ideas that have been created, I've translated the post-its and groupings as it was organized during the summit into a digital version for easier viewing.
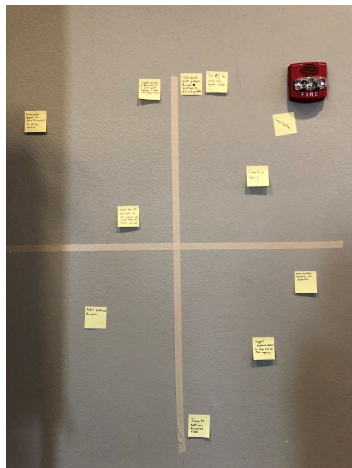

BriteQuote – Creative Matrix & Impact/Difficulty Chart   By Will Guldin

Our final brainstorming activity involved coming up with a range of feature ideas for our new quoting module. To scope the conversation, we used a creative matrix, which is a grid with several possible combinations.

		How Do We …?			
	Enable better decision making	Expand our target market	Make quoting more accurate	Empower Agents to close the deal.	Speed up the quoting process
Using gamification					
Using our API					
Using Mobile Apps					
Using BriteCore's UI					
Using emerging technology (VR, chat interfaces, AI)					

(Using …? label at left of rows)

Participants then used post-it notes to place ideas in different cells of the matrix. For instance, an idea to 'expand our target market' using 'our API', could be to support other kinds of insurance, like automobile policies.

Favorites from this pool of ideas were then chosen, and they were then prioritized by their impact, and by how difficult they would be to do.
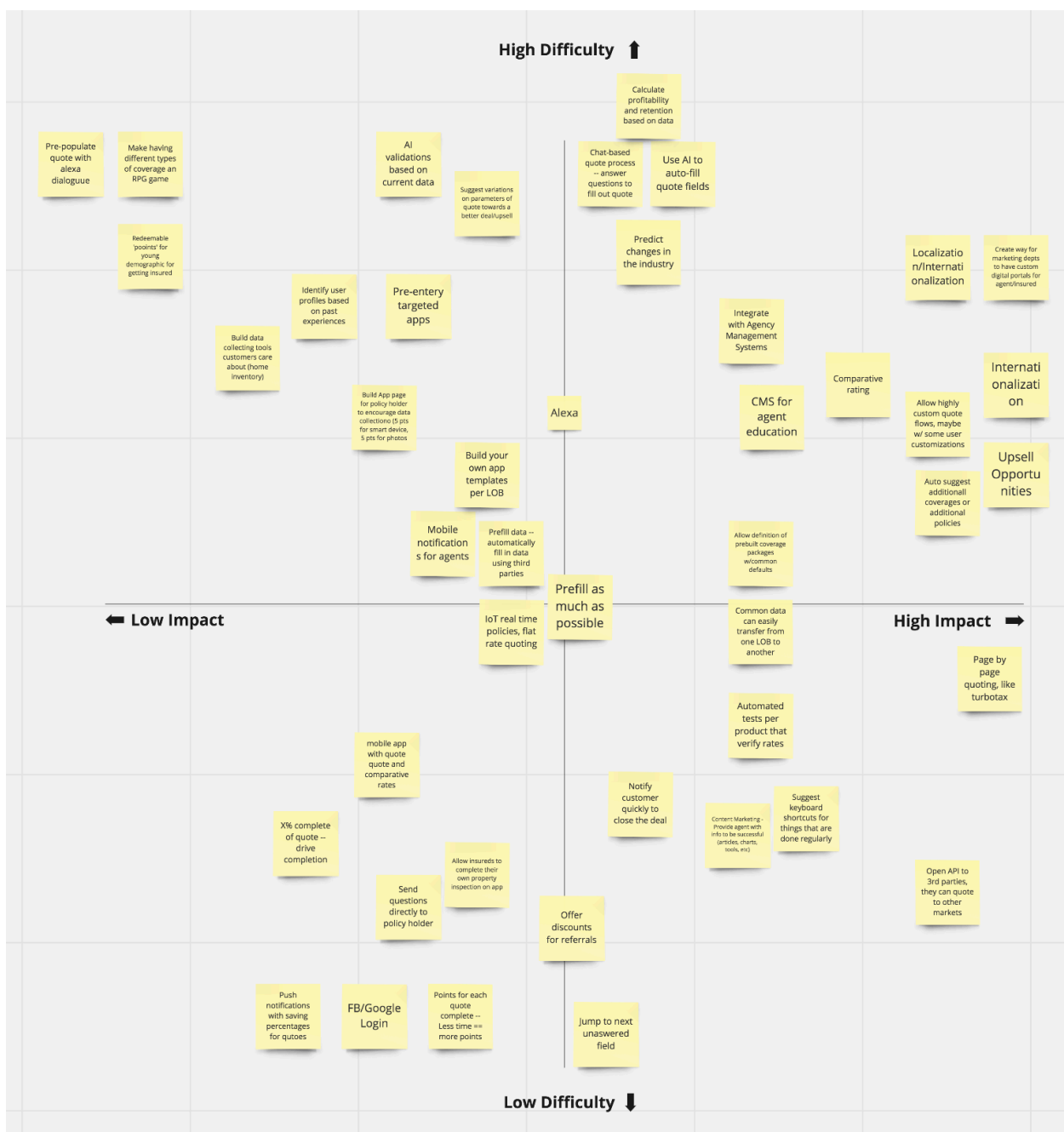
Findings

This exercise helps prioritize a wide range of ideas. Even though emerging technology concepts were popular, they were generally considered lower impact and harder to do than more foundational things, like a solid Quoting User Experience, or adding pre-built coverage packages to the system.

Additional Resources

[More than 150 ideas](#) were collected across the four sessions! Also, the [full version of the impact/difficulty chart](#) is on RealTimeBoard.