



Improving Agent Engagement with the American Family Insurance Brokerage & Alliance Group

Project Sponsor

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Executive Summary

The goal of this UW-Madison student-team project was to help American Family Insurance's Brokerage and Alliance (B&A) group enhance awareness and usage of B&A products by agents. The focus of the project was on identifying improvement ideas for the website and other means by which the B&A group engaged the agents.

The first step in the project was to gather information from the agents and the sales consultants. The team determined that the best way to achieve this was by creating and distributing a survey to both parties to gain an overall understanding of the perspectives and feedback from the team itself. The team created two surveys, one targeted towards the agents and one towards the sales consultants and/or specialists. Included within the survey was a question inquiring whether or not the respondents would be willing to participate in a follow up interview once the surveys were completed. The team received survey responses from 43% of agents and 100% sales consultants, with interest in interviews expressed by 40% of the surveyed agents and 75% of the sales consultants and specialists. During the interviews conducted, the team integrated a usability test in which the participant would demonstrate different ways they would access information and navigate the website. This process was very helpful in demonstrating the agents' true understanding of the website and ease of use regardless of the initial survey responses and feedback on the website.

Based on the data the team collected from both the surveys and the interviews, the team then integrated the data with the initial website analysis in order to develop recommendations to meet the goal of the project. The recommendation was in the form of a redesign of the website. The team designed various different website concepts before developing the final website redesign concept to the B&A team. In the UW team's final website design concept, all of the content remained the consistent with the current website, however the website design was updated, re-organized, and there were some innovations integrated into the site to further achieve the goal of engaging agents and increasing overall ease of use of the website itself. One of the key innovation items recommended on the revised website was a training page. This page could be used for hosting a website navigation video, basic training videos to further increase knowledge of B&A products and services on-demand, and also sample forms in order to simplify the quoting process for new B&A quotes. The team also recommended a live chat feature, which would be used to answer simple questions regarding the content of the website, and the chat could be managed by sales specialists and/or other team members who may not have full knowledge of the B&A products and services but have an understanding of the layout and navigation of the website. Another website feature recommendation the team proposed was a product or form browser. This feature was designed to be similar to the concept of navigation within iTunes and would help the agents locate a form more easily by including additional categories. The team compiled all of the recommendations and integrated them into a full website re-design concept which was then presented to the B&A team.