PORTFOLIO
DANIEL TREUFELD
DESIGNER UX / UI

1. Allianz Health-App
2. Allianz Claims Navigator
3. Allianz Loyalty Program

ALLIANZ HEALTH-APP

iOS / Android

- The biggest challenge was developing the photo function in-house, as it is the main function of the app. Fileee's SPA was later integrated because it had significantly better edge detection
- I was significantly involved in the development of the information architecture, the GUI and the interaction concepts
- It was important to me to get a detailed insight into the end-to-end process. The exchange with the developers is also important in order to create the optimal balance between technology and usability
- Initially, I was able to prepare, lead, carry out and evaluate user tests - the findings were incorporated into further development

CHALLENGES, OBJECTIVES, EFFECTS

Allianz Health-App

User Problem

Users could submit their receipts online using a form. Previously, a photo of the receipt had to be taken and downloaded to the computer. There was no mobile version of the form. There were and are three different types of users when handling submissions:

1. Receipts are submitted immediately after the doctor's visit

2. Users submit receipts several times a year (e.g. monthly)

3. All collected receipts will be submitted at the end of the year

Users often create long Excel lists to calculate whether a submission is even worth it or whether to receive the bonus instead.

Many users submitted their receipts primarily by post. However, they had to buy extra stamps for this. The letter also has to be taken to the post office (time and financial effort).

The analog documents had to be digitized and forwarded to the respective departments by the clerk. Submitting by post took up a lot of time for users and clerks.

The users had no insight into the process during the processing time (What happens when and why? Can they speed up the process themselves?). They didn't know when they would receive their money. There were no status reports. Most of the time, users called after a week to check the status. Allianz incurred additional costs for each call.

Only after completing the entire process did the user find out why, for example a receipt was not refunded. This leads to frustration. Users wanted to speed up the process so they could get their money quicker.

Business goals

- Expanding the user base (old app had 62K)
- By the end of 2016, 20,000 additional users should install the new app and complete registration
- Brand is perceived as digital, fair, simple
- Reducing costs by reducing calls to the service center by 60%

Produkt goals

- More than 100,000 installs in the Apple App Store and Google Play Store
- Rating in the Apple App Store 4.7 and Google Play Store 4.6 after the relaunch
- Most users found the app to be simple
- The number of calls from users to the service center has been significantly reduced

Achieved goals

- Mehr als 100.000 Installationen im Google Play Store und App Store von Apple
- Bewertung Google Play Store 4.6, App Store 4.7
- Die meisten Nutzer empfanden die App als einfach
- Die Anzahl der Anrufe von Nutzern im Servicecenter wurde stark reduziert

INSIGHTS, USER FEEDBACK, SOLUTIONS

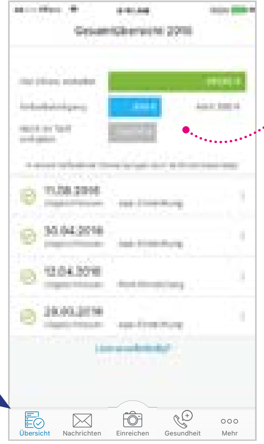
Allianz Health-App

Tests Findings:

„What does the sign mean? It's very small and faint."

The photo function competes too strongly in color with the other areas, even though it is not the main function.
Color contrast is very low and hardly recognizable for people with visual impairments.

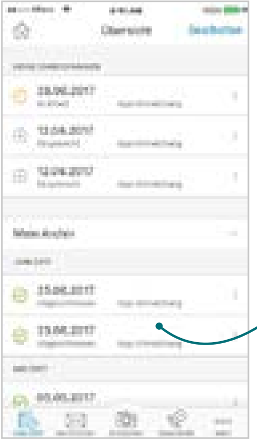
Solution:
Clearer icons, higher contrast
„General Overview 2016" wording.
The main focus is no longer on the photo function.



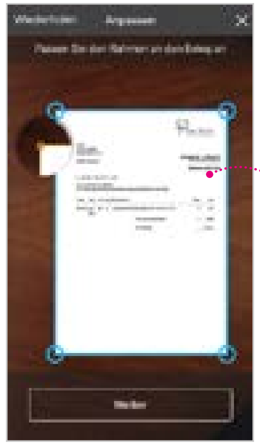
Tests Findings:
Bar charts are not understandable.

„Where are the remaining information (taxes, etc.)?"

Interim Solution:
No bar chart, as a comprehensive list of data is sent to the customer by post (later by email).
Formulation „Overview". In the overview, the user finds all submissions from the last 3 years.
New sorting into applications in progress and archive with already completed applications.



Feedback after another user test:
The summary of all submissions is perceived as clear.



Solution:
Fileee SPA with automatic detection of paper outlines and QR codes. QR codes require a separate process that is automatically detected and initiated.

Test Findings:
Zooming or using the frame to adjust the photo is rarely used.

„Why don't the doctor's bills come in digital form?"

Concept for new submission process

Feedback after another user test:

„Oh, this is easy to use. I just have to hold the camera over it."

Tests Findings:

„I can barely see the close button."

(It is likely that the flash on and off function was not perceived either.)

„How many pictures have I taken?"

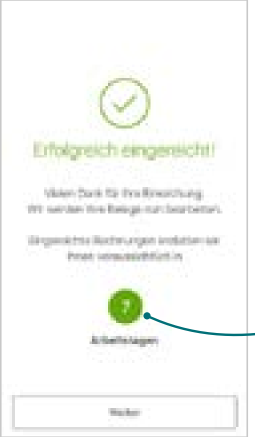
Solution:
Higher contrast for the icons.
Marking of the photos already taken.
Trigger button adapted to the native app.
Explanation of what to consider at the beginning and during the process.
New submission process.

Feedback after another user test:
The process is generally perceived as simple. There were no further indications of missing the number of images or the ability to turn the flash on and off, or to complete the process.

Test Findings Solution Feedback after another user test

INSIGHTS, USER FEEDBACK, SOLUTIONS

Allianz Health-App

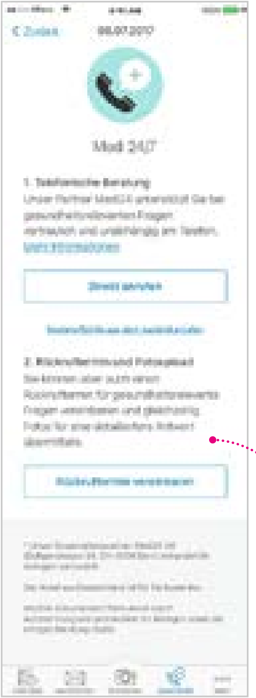


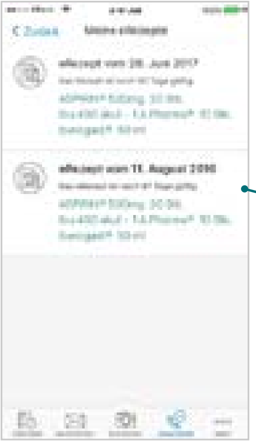
Feedback after another user test:

„Only 7 days? Nice that you are informed about how long the processing of your request takes. The processing time is significantly shortened"

The processing time can actually vary depending on the case. In most cases, everything is completed after 3-6 days. Displaying „7 days" avoids calls and thus saves costs.

First rough concept for health area, remote diagnosis, ePrescription and their submission process.



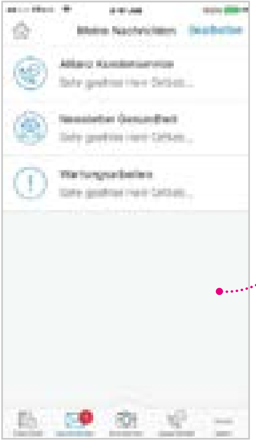


Feedback after another user test:
An eRecipe is not expected after the request. It is also not expected to be provided free of charge by Allianz. Nevertheless, positive feedback for this offer.

Test Findings:
First skeptical look at the doctor's help (Is it even possible to make a good diagnosis over the phone?)
It is suspected that an Allianz employee is on the other end (better clarification necessary)
Medi24 partner's location in Switzerland, connection with „Paid from abroad" and „Call free of charge" not quite understandable.

Solution:
No further tests for this MVP for the time being.

Erstes Konzept für den Informationsteil



Test Findings:
Users complained that they cannot immediately see all the possibilities of the app and to be able to contact Allianz from the app.

Solution:
Welcome email with all information about the app appears first in the mailbox (not tested).
Furthermore, the option was installed to send a message to Allianz (not tested).

Onboarding

Test Findings:
Onboarding process: Especially older test subjects try to tap the icon to start the recording. They perceive the icon in link color as a button.

Solution:
Clearer marking as an illustration

Feedback after another user test:
The illustration is no longer perceived as clickable. This puts more focus on the buttons and the information.

Test Findings   Solution   Feedback after another user test

ALLIANZ CLAIMS NAVIGATOR

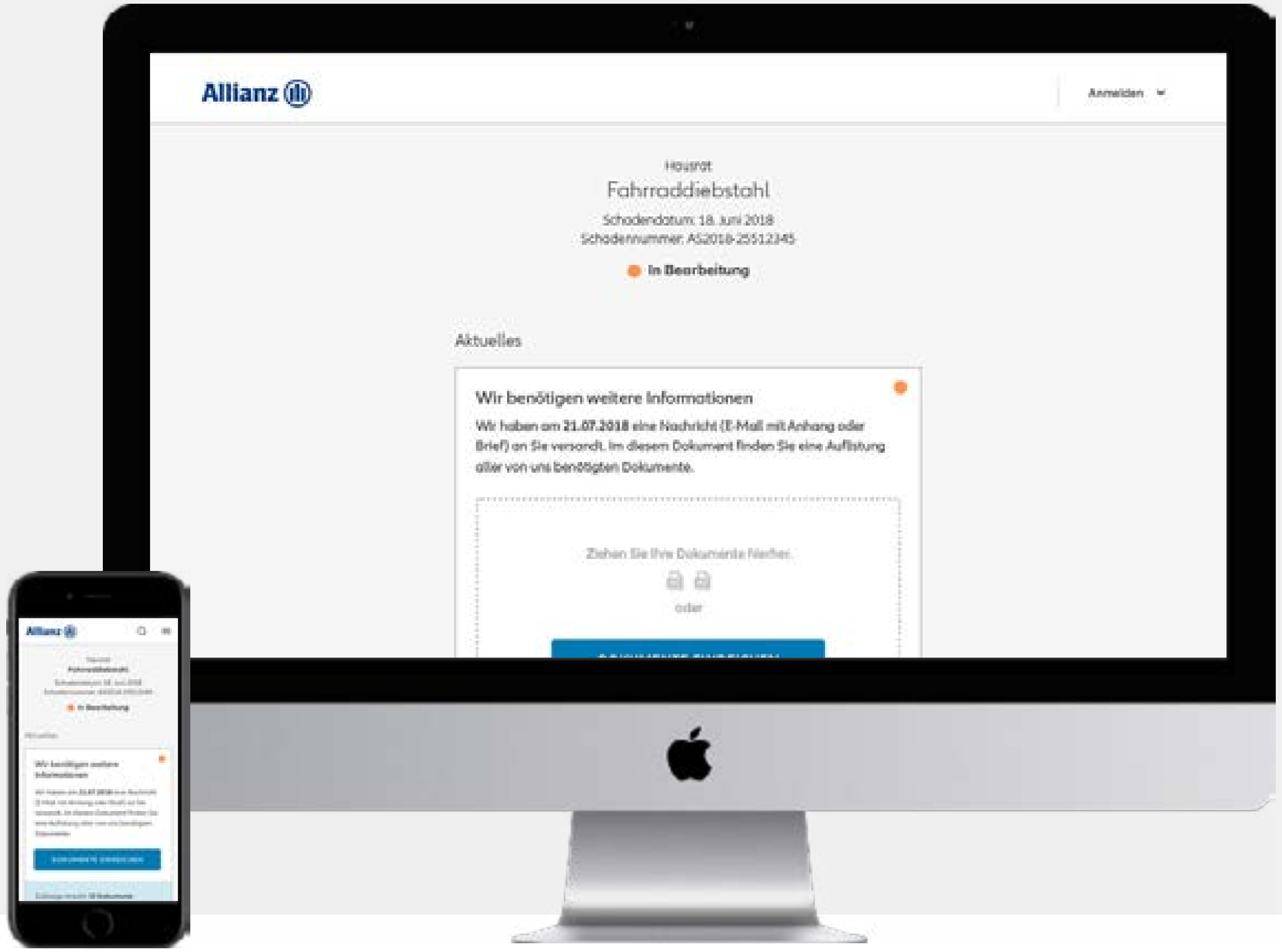
Web Application

- The biggest challenge was displaying the individual status messages, as there was no service yet. Only emails with a status were sent. For the interim solution, I had the idea of accessing the email IDs and connecting them to the damage report. This enabled us to provide the user with more precise information about the current status

- I was significantly involved in the development of the information architecture, the GUI and the interaction concepts

- It was important to me to get a detailed insight into the end-to-end process. The exchange with the developers is also important in order to create the optimal balance between technology and usability

- Initially, I was able to prepare, lead, carry out and evaluate user tests - the findings were incorporated into further development



CHALLENGES, OBJECTIVES, EFFECTS

Allianz Claims Navigator

User Problem

The customer faced similar challenges as with the Allianz health app. Many users of the app submitted their receipts by post. This resulted in a time and financial expenditure on the part of the customers and Allianz.

Users also had no insight into the process (What happens when and why? Can they speed up the process?).

While receipts for health insurance can be processed relatively quickly, the person responsible for property damage needs different amounts of time. Property damage up to a certain value, for example, is processed within a few days. Damage that requires legal input or more detailed examination by Allianz may take significantly longer.

Customers did not know when they would receive their money because there was insufficient status reporting during processing by the clerk. That's why users often called the service center a week after reporting the damage to find out how things were going. Every call cost Allianz a lot of money. One goal was therefore to reduce the number of calls.

How often users were notified during the process was entirely at the discretion of the clerk. Information about the current status came via SMS and email. However, the status updates were incomplete and did not provide the information that was important to customers. Only after completing the entire process did customers find out why, for example. B. part of the payment was not refunded. This often led to frustration. With our help boxes we were able to provide more accurate status updates and significantly reduce customer frustration.

The most important findings on the basis of which we developed the help boxes were:

- What happened?

- What happens next?

- What do i have to do?

- When do I get my money?

Business goals

- Expectation management is integrated. The customer can see where they are in the process at any time
- First rough display of expected processing time
- Brand is perceived as digital, fair, simple
- Reduce costs by reducing calls
- Increasing NPS

Product goals

- Transparency of the process
- Documentation of the process
- Status (what happened) and preview (what happens next)
- Tasks, what does the customer have to do (e.g. submit receipts)
- Improve communication

Achieved goals

- Increase NPS up to +75
- Reduce costs by reducing calls
- Expected processing time has been integrated
- Transparency of the process through detailed status updates
- Documentation of the process
- Communication has been massively improved

INSIGHTS, USER FEEDBACK, SOLUTIONS

Allianz Claims Navigator

Test Findings:

„Do I get a payout now? What does my process look like now?“

The display of the process history on an extra page confuses the user. He cannot see from the list where he is in the process.

It is observed that hardly any user reads the text completely.

Charlotte wants to know what will happen in detail:

„Someone who explains step by step makes me happy.“

Raphaelle assumes that the insurance company will tell her how to proceed.

Solution:

The most important insights about the process were gained through several user tests. Almost all users wanted to know the following after the complaint:

What has happened so far?

What happens next?

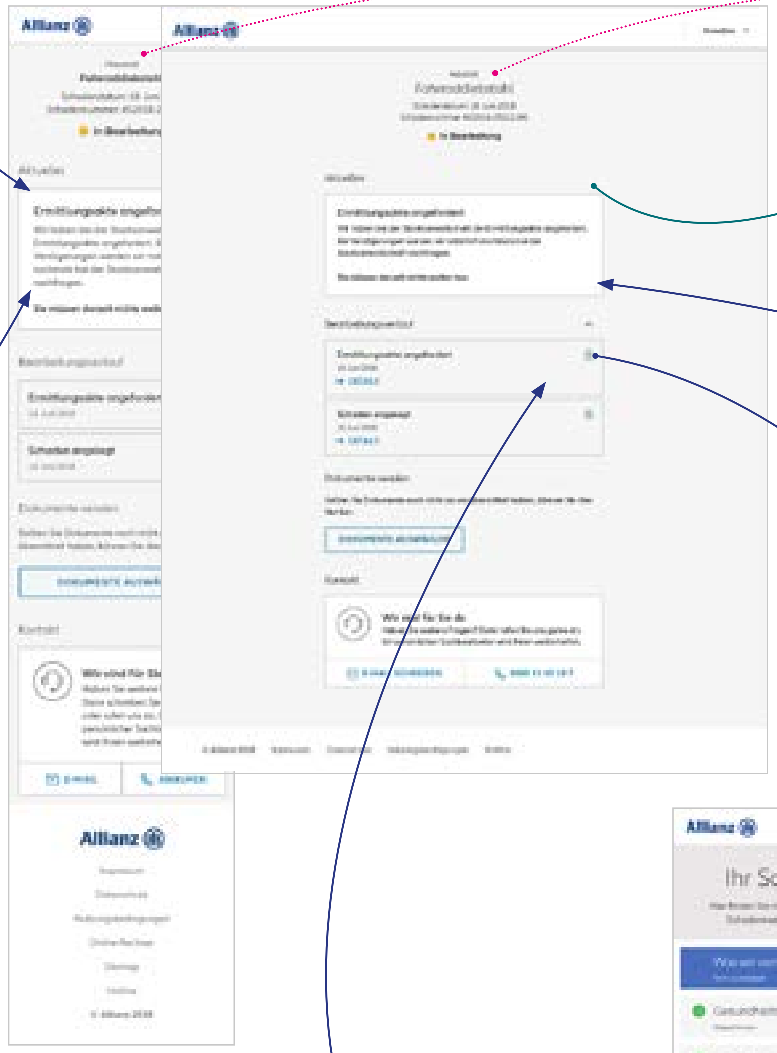
When do I get my money?

How long does it take in total?

For this reason, we introduced „Help Boxes“ that provide exactly this information.

There was also an important insight that we were able to incorporate. The sentence „You don't need to do anything else at the moment.“ kept customers from calling the service center. They would wait at least a week until the next status appears in the Help Box -> KPI reduction of calls to the service center.

Help-Box



Test Findings:

Charlotte erwartet, dass die Wartezeit verwirrend ist.
Prozessstatusanzeige im Kopf aus technischen Gründen als Zwischenlösung gedacht.

Feedback after another user test:

„I would wait a week now. If nothing has happened by then, I would call the Allianz service center.“

Solution:

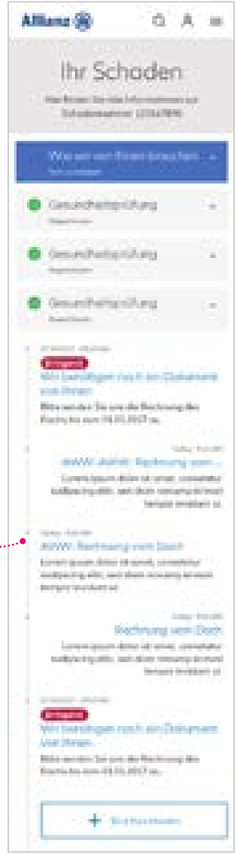
Concept for a status that provides more information. Registration is required.

Test Findings:

One of the first drafts of detailed information about a status.

After unfolding the accordion, too many different pieces of information are displayed on one page in the worst case. In addition, the user can only see the detailed information after logging in. Therefore, we only had the option to jump to a new page.

Represents a doubling with the newly designed ProgressBar.



Solution:

After logging in, the user jumps to a new page. A new page allows a more extensive and clearer display of detailed information.

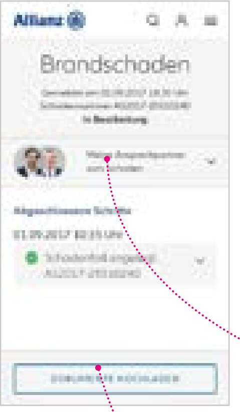
Solution:

First concept for a more detailed status bar in the header.

Test Findings Solution Feedback after another user test

INSIGHTS, USER FEEDBACK, SOLUTIONS

Allianz Claims Navigator



Test Findings:
By placing the representatives at this point, users are more motivated to call and ask about the next status in the process. (KPI = Reduction of calls to the service center).

Test Findings:
Philippe found that the person who explains everything to him is the most useful part of the claims handling process.

Solution:
The alternative way of contacting is now less present. In user tests, this was recognized as a possibility, but is no longer perceived as a primary necessity.

Test Findings:
„What should I upload here?"
The permanent visibility (sticky button) of the option to submit documents confuses users when they have nothing to submit.

Solution:
The alternative way to submit documents is less present.

Feedback after another user test:
Test users attribute special importance to the „Help Box".

„I immediately see what is important"

Solution:
Concept for a personal contact person - currently not technically feasible.

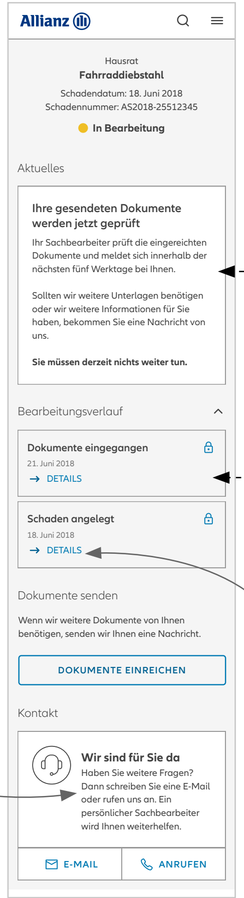
Solution:
A dark background highlights the most important information in the help and task box.

First MVP without further details on the status.

Feedback after another user test:
In user testing, this was recognized as an option, but is no longer perceived as a primary necessity.

Draft for displaying the personal case worker in MVP1.

General contact point - interim solution in MVP2, as data from the case worker could not yet be displayed.



Help-Box with note on next steps.

Status in the processing history.

First draft with further details on the status.

User selects documents on device.

Send

Detection (Virus or damage?)

No broken file or virus

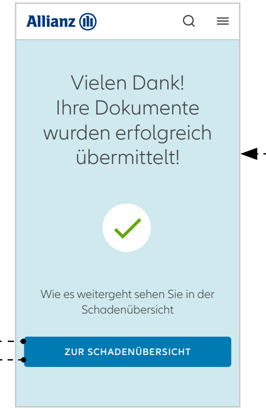
If file defect or virus = error

Gespeichert in Dokumenten-Datenbank

DocIDs auf Device

DocIDs on Device

Informationen im Backend gespeichert



ALLIANZ LOYALTY PROGRAM

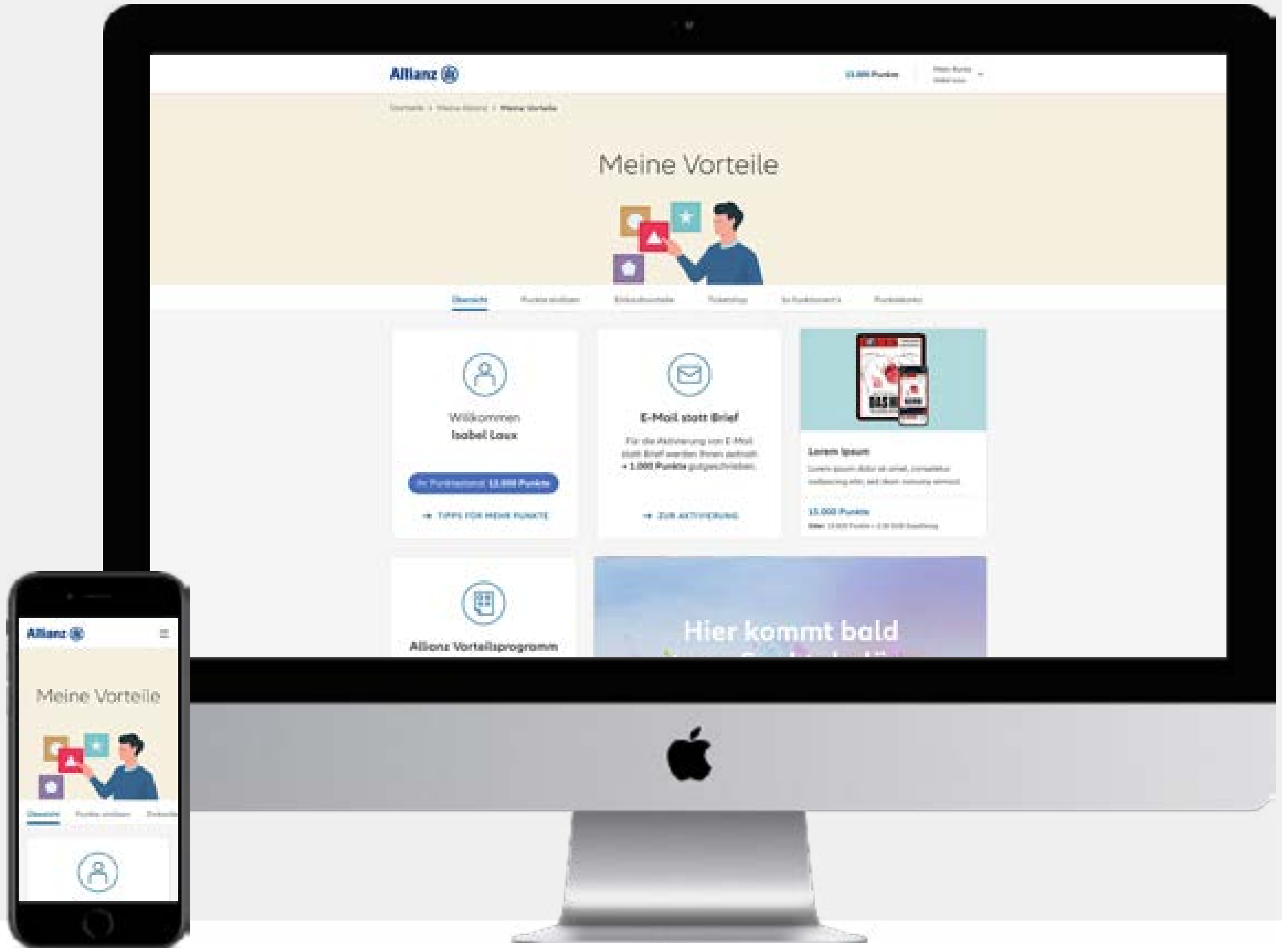
Web Application

- The biggest challenge was working with our service providers. We were promised more technical requirements than were available, so many of our requirements could not be implemented. For the most part, we had to develop creative solutions for individual areas very quickly

- We carried out user tests in order to integrate the findings from the tests into further development. I was also able to carry out further hallway tests to obtain specific information more quickly

- I was significantly involved in the development of the information architecture, the GUI and the interaction concepts

- It was important to me to get a detailed insight into the end-to-end process. The exchange with the developers is also important in order to create the optimal balance between technology and usability



CHALLENGES, OBJECTIVES, EFFECTS

Allianz Loyalty Program

User Problem

The old Allianz Advantage Program was no longer up-to-date in terms of technology. It could only be accessed via desktop. For the most part, its use was not accessible.

The old structure of the portal was very nested in parts, popular products could not be found by users.

Based on the number and age of contracts with Allianz, users were divided into three different point status levels. However, the staggered system and the point logic were not clear to every user. It was not clear when and why one was classified into which level. Authors could not launch flexible promotion campaigns in the portal or highlight special offers.

There were no newsletters and no status updates via email or SMS during the purchase process. Existing email templates could only be adapted by the authors with great effort.

The biggest challenge was the technical implementation of the shop. Some requirements could not be met in large parts, so very often, new concepts had to be created very quickly. For example, due to the different payment service providers, a comprehensive shopping cart could not be created. The data of the product providers could not be technically merged. Therefore, there is now a separate shopping cart for each area.

Nevertheless, we were able to achieve a significant improvement in the user experience. In the shop, many more and more diverse products can now be offered, more than one competition can be offered, and tickets can be sold. According to the feedback from our existing and new users, usability has been significantly improved. The offers can now be found and acquired faster through an improved process.

Business Goals

- Increase in sales of premiums, tickets, and credit cards
- Increased interaction with the My Allianz Portal
- The advantage program is to be established in the long term also outside the closed area
- Increase of current logins by 41% by the end of 2021

Product Goals

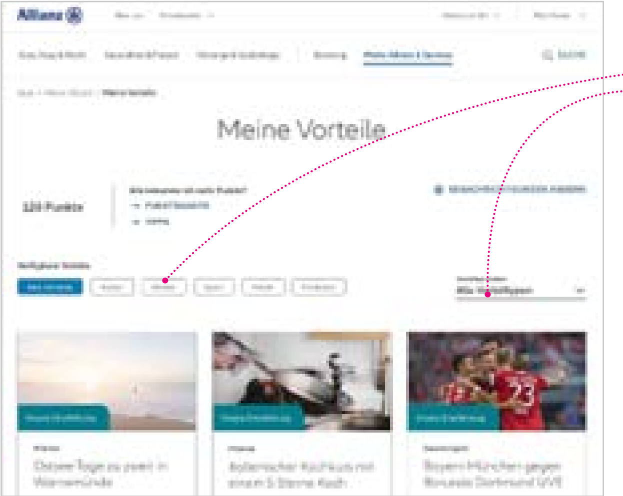
- Attractive premiums should encourage purchases
- Wide range of tickets
- The promotion of individual products or competitions should be easier to handle
- The portal should be designed to be more appealing and clear, processes should be easier to go through
- More flexible handling of newsletters and customer communication by our authors

Achieved Effect

- Increase in logins by 35%
- Despite technical hurdles, several service providers have been connected. Customers can choose between different offers (redeem premiums with points and additional payment, buy credit cards, take advantage of partner offers, buy tickets, participate in competitions, actively and passively collect additional points)
- Overall, the portal is described by users as simple, processes are understood and easily completed.

INSIGHTS, USER FEEDBACK, SOLUTIONS

Allianz Loyalty Program

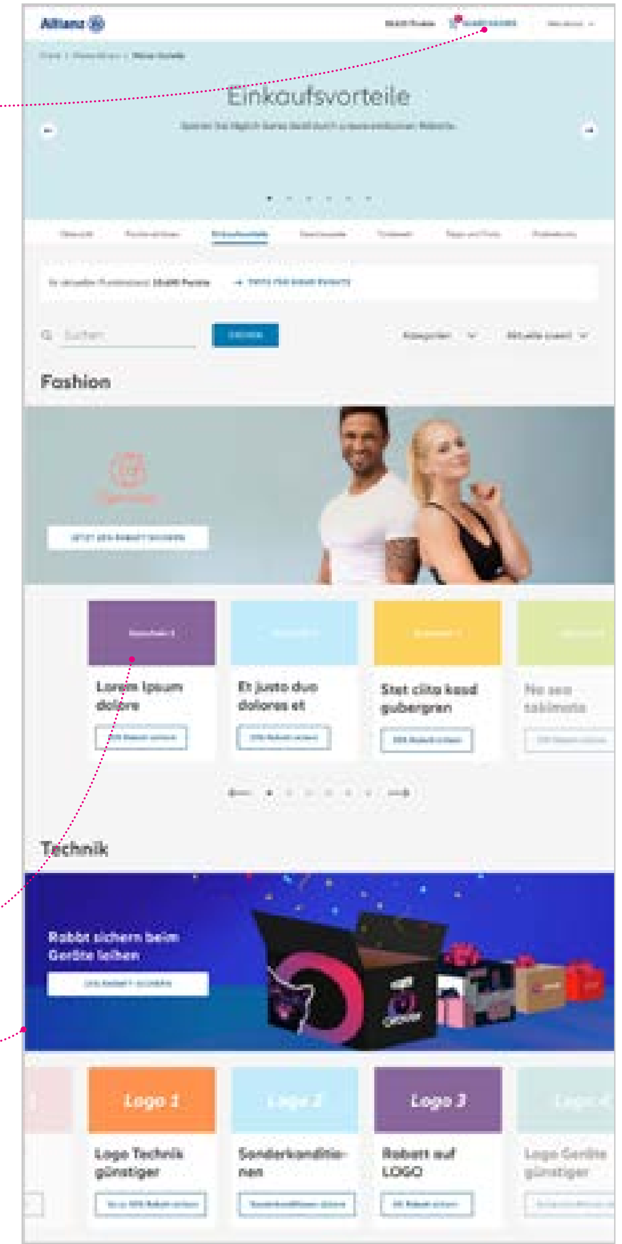


Test Findings:
Some participants do not understand the difference between the two types of filters and how they interact.

Solution:
Splitting of the filters into a toolbar
Filter limit on search input field, dropdown and link to shopping cart

Test Findings:
Currently, a portal-wide shopping cart is not feasible for technical reasons, as the various payment service providers cannot be merged.

Solution:
There is a separate shopping cart for each portal area.



Test Findings:
The „How it works" page is perceived as not clear. Too much information that does not promote understanding of the connections in the portal.

Solution:
Currently, there is a focus on drastically reducing the amount of information.

Information packages should be summarized in a few bullet points. If more information about the benefit program is needed, the FAQ page is offered.

Test Findings:
The vast majority of participants cannot imagine what the difference is between „buying a voucher" and partner offers. There is great confusion about whether points can be redeemed for vouchers. Many of the participants expected this.

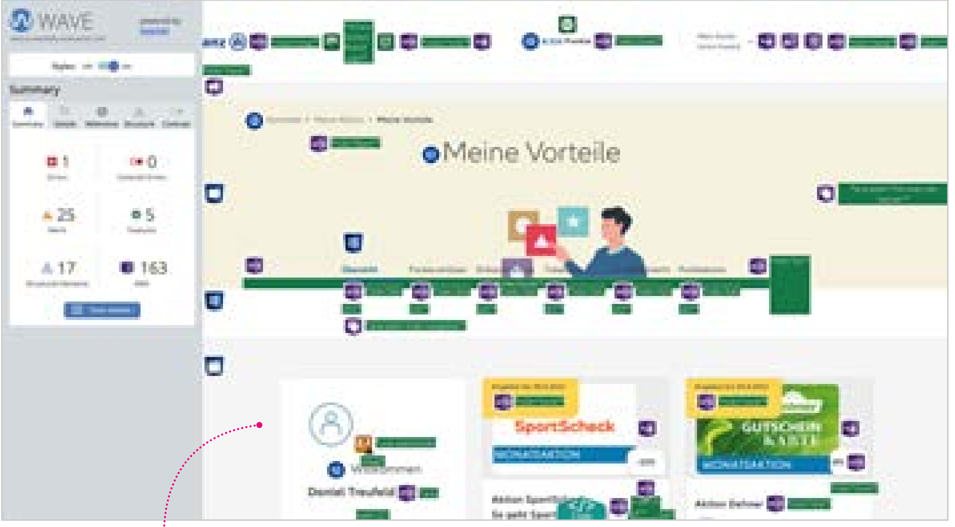
Solution:
German division and designation of the two areas „Vouchers" and „Partner Offers".
Clearer alignment of the label text with shopping.

Feedback after another user test:
The listing of the products is perceived as clear.

Test Findings   Solution   Feedback after another user test

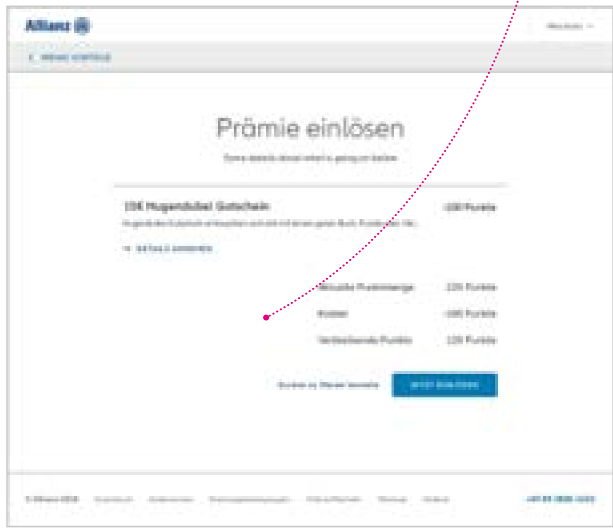
INSIGHTS, USER FEEDBACK, SOLUTIONS

Allianz Loyalty Program

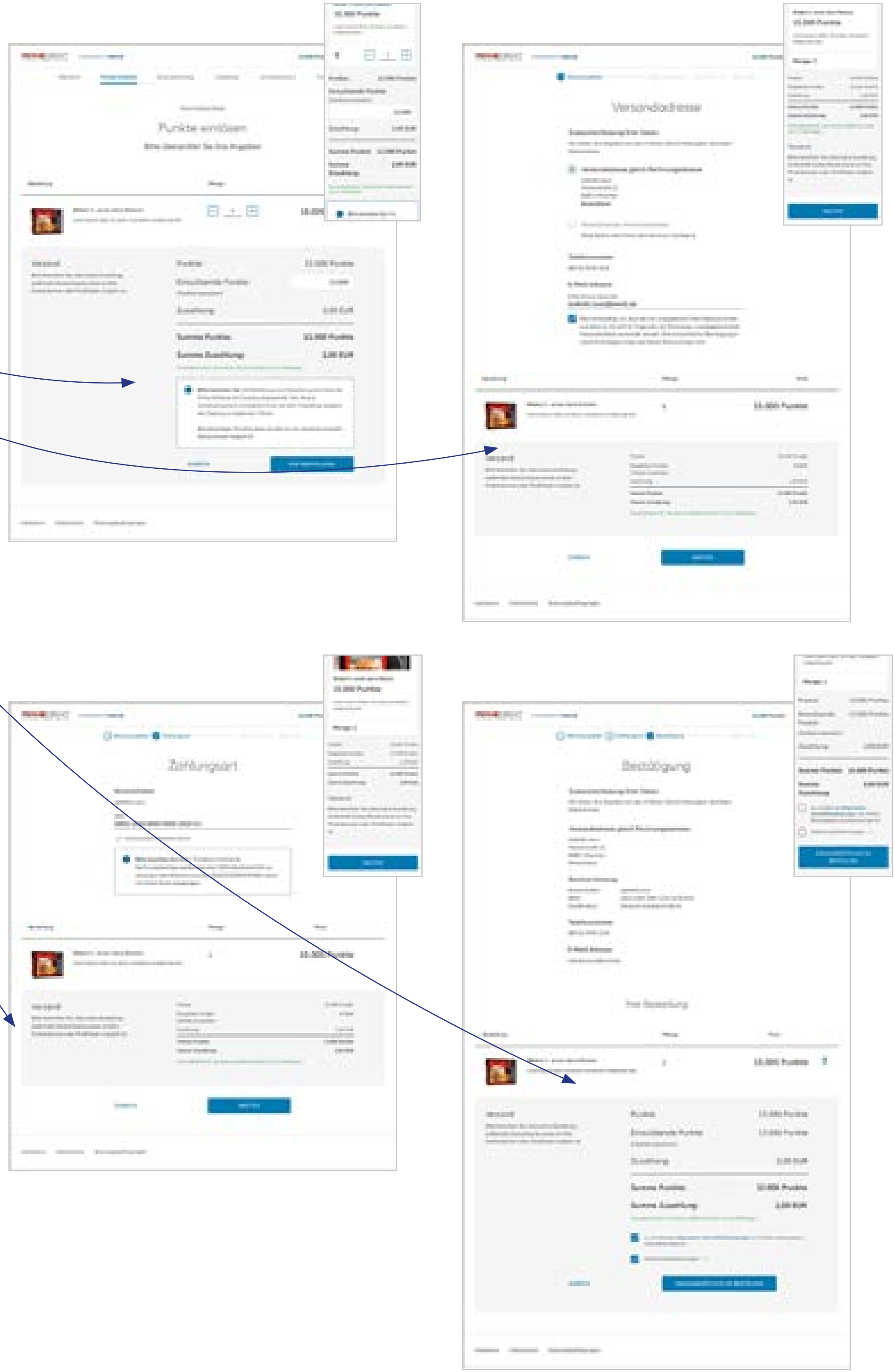


Test Findings:
A test with the Wave Test Tool revealed several issues. ARIAL labels were set incorrectly or too often. Often these were not given a speaking name. Structurally, there are some problems in the DOM, landmarks were also not set correctly or labeled with speaking labels.

Solution:
Broad-based investigation into the topic of accessibility - currently in planning.



Test Findings:
Two participants complain that the points overview only appears on the last screen in the checkout process. They would like to see it earlier.
„I would have liked to see this overview at the beginning."



Solution:
The overview of the points can now be found in every step of the checkout process.

- Shopping cart
- Delivery address
- Payment method
- Purchase confirmation

Test Findings:
The screen reader cannot fully recognize the content of the tile.
Output confuses screen reader users with the following output:

- Nur noch 187 Stück auf Lager!
- related products region
- -10%
- link
- link Gutschein 2 Gutschein 2
- 10% Rabatt Guthabenkarte
- Baumarkt!
- link
- link kaufen

Possible Solution:
Link the individual areas in the tile, for example with ARIALABLEDBY.

```
<h2 id="lbl1"> Toom Kaufgutschein</h2>
<span id="lbl2">-10% Rabatt</span>
<button id="btn"
        aria-labelby="lbl1 lbl2 btn">
        KAUFEN
</button>
```

Screen reader output:
„Toom Kaufgutschein -10% Rabatt kaufen Link" (noch nicht umgesetzt).

Test Findings · Solution · Feedback after another user test