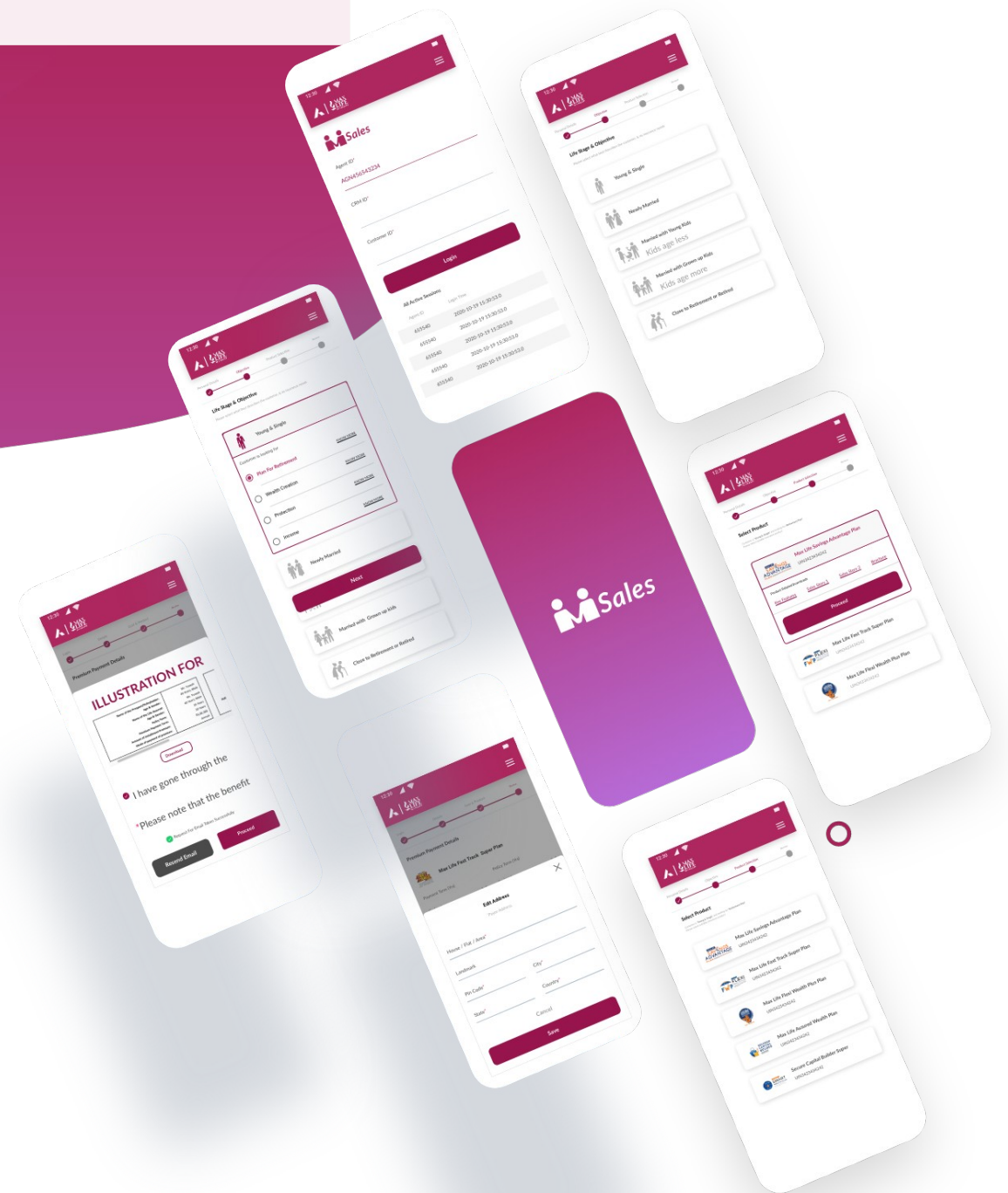


Msales | Axis bank UX Case Study



About

SP and POSP (users) are bank people who pitch and sale Max Life insurance products to bank customers. Once a bank customer shows its interest, SP / POSP update personal information, customer profile (annual income, life/saving goals etc) in mSales to parse the lead to Max Life system.

Problem Statement

mSales being used by Axis bank requires an easy process to capture lead information. Product team have recently upgraded to a responsive user interface (as asked by bank) which is slightly better as compared to the old webapp (which was only adapted to laptop/desktop screens).

Task is to understand the process being followed by users (SP & POSP) and prepare a solution that can increase their productivity.

The image displays two smartphone screens showing the mSales application interface. The left screen shows the 'Customer Details' form, and the right screen shows the 'Sales' login screen.

Left Screen (Customer Details):

- Header: 12:30, MAX LIFE
- Progress: Personal Details (1), Objective (2), Product Selection (3)
- Section: Customer Details
- Text: Please provide proposer details & annual income
- Fields:
 - CRM ID: 1000052115
 - Customer Id: 956265963
 - Customer Name: Rahul Kumar Manuja
 - Phone Number: +91 9522 678 91
 - Mail ID: amritb88@gmail.com
 - Customer DOB: 07 - 07 - 1991
 - Gender: Male (selected), Female
 - Country: India (selected), Other
- Section: Proposer Details

Right Screen (Sales):

- Header: 12:30, MAX LIFE
- Section: Sales
- Fields:
 - Agent ID*: AGN456543234
 - CRM ID*
 - Customer ID*
- Button: Login
- Section: All Active Sessions
- Table:

Agent ID	Login Time
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0

Solution

Our proposed solution aims to enhance the user experience by segmenting input data into manageable steps. Each section will be clearly titled for easy navigation, and we will automate the retrieval of customer details from Axis Bank's existing records, since we are targeting Axis Bank customers with our policy pitches.

Project overview

14 Weeks

Timeline

100+

Screens



Tools

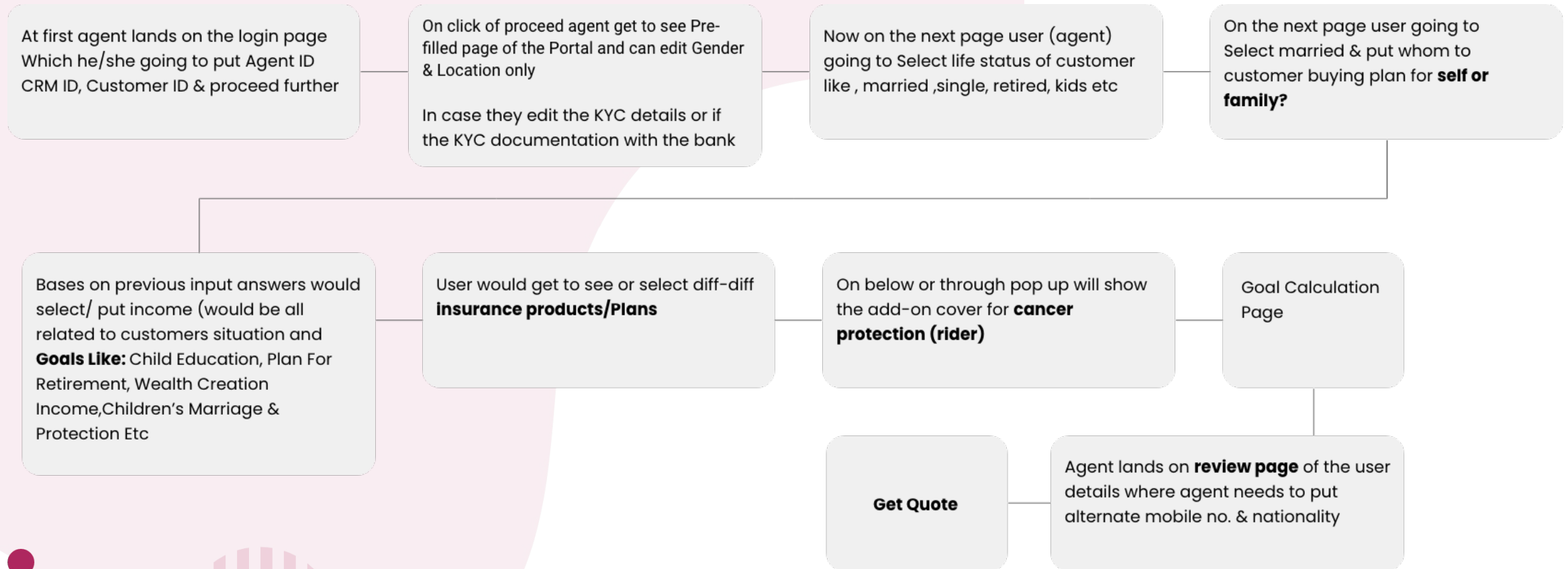
Mobile & Desktop

Project

Design Process



User Flow



Low Fidelity Wireframes



Login to mSales

Agent ID

CRM ID

Customer ID

Login to mSales

All Active Sessions

Agent ID	Login Time
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0



Details Goal Calculator

New Lead Details

CRM ID
1000052115

Customer ID
956265963

Customer Name
Rahul Kumar Manuja

Contact No. Country
+91 7838971976 India

Customer DOB
01-01-1990

Mail ID
rahulmanuja2058@gmail.com

Gender
☒ Male ☐ Female

Next



Details Goal Calculator

Select Life Goal

Young & Single

Newly Married

Married with Young kids

Married with Grown up kids

Close to Retirement or Retired

Back

Next



Details Goal Calculator

Select Life Goal

Young & Single

Goals	%People*
Plane For Retirement	81%
Wealth Creation	81%
Protection	81%
Income	81%

Newly Married

Married with Young kids

Back

Next

Low Fidelity Wireframes

AXIS BANK | MAX LIFE INSURANCE

Details

Goal

Calculator

Select Product

**Max Life Savings Advantage Plan**

Download

Brochure

Key features

Sales story 1

Sales story 2

Add Ons

☐ Cancer Protection Plan

**Max Life Fast Track Super Plan**

**Max Life Flexi Wealth Plus Plan**

**Max Life Assured**

Back

Next

AXIS BANK | MAX LIFE INSURANCE

Personal Details

Objective

Product Selection

Review

1

2

3

4

Review Illustration

Premium Payment Details

**Max Life Fast Track Super Plan**

Payment Term (Yrs)

Policy Term (Yrs)

Mode of Payment

Dividend Options

Premium commitment

Dividend Adjustment

Effective date of coverage

Can be backdated upto 90 days within same FY

☒ Would you like to Add Rider?

Accidental Death And Dismemberment Rider

Add Amount

Get Quote

Generate Illustration

AXIS BANK | MAX LIFE INSURANCE

Personal Details

Objective

Product Selection

Review

1

2

3

4

Maturity Value (IFTIS)

Guaranteed	@4%	@8%
2,48,000	3,54,596	12,75,996
Sum Assured		
2,30,698		

Close

Gender

Date of Birth

Male

01/01/1990

Policy holder state

Max life registered state

Punjab

Punjab

Mobile No.

7838971976

Payor Address

B-90, Civil Lines, Sec 11, Near Rajinder Sweets

Pincode

City

122001

Gurugram

State

Country

Uttar Pradesh

India

AXIS BANK | MAX LIFE INSURANCE

Personal Details

Objective

Product Selection

Review

1

2

3

4

Edit Address

Payor Address

House / Flat / Area*

Landmark

Pin Code*

City*

State*

Country*

Discard

Save

Punjab

Punjab

Mobile No.

7838971976

Payor Address

B-90, Civil Lines, Sec 11, Near Rajinder Sweets

Pincode

City

122001

Gurugram

State

Country

Uttar Pradesh

India

Design System

- Typography

Aa

A B C D E F G H I J K L M N O P Q R S, T, U, V, W, X, Y, Z.

A B C D E F G H I J K L M N O p Q R S, T, U, V, W, X, Y, Z.

Roboto

Thin

Light

Regular

Medium

Medium Italic

Bold

Black

- Colors



#97144D



#4A4A4A

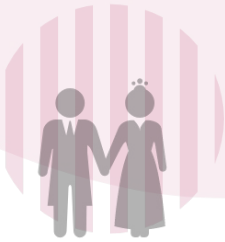


#000000



#83829A

- Icons



Designs

12:30

 MAX LIFE
BY LIFECUP

 Sales

Agent ID*

AGN456543234

CRM ID*

Customer ID*

Login

All Active Sessions

Agent ID	Login Time
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0
655540	2020-10-19 15:30:53.0

12:30

 MAX LIFE
BY LIFECUP

Personal Details

Objective

Product Selection

Review

Customer Details

Please provide proposer details & annual income

CRM ID

Customer Id

1000052115

956265963

Customer Name

Phone Number

Rahul Kumar Manuja

+91 9522 678 902

Mail ID

Customer DOB

amritb88@gmail.com

07 - 07 - 1991

Gender*

Country*

Male

Female

India

Others

Proposer Details

Is Proposer the 'Life to be Insured'*

Yes

Date of Birth of Insured (DD MM YYYY)*

07 - 07 - 1991

Select Annual Income*

₹ 5L - 7L

Proceed

12:30

 MAX LIFE
BY LIFECUP

Personal Details

Objective

Product Selection

Review

Life Stage & Objective

Please select what best describes the customer, & its insurance needs

 Young & Single

 Newly Married

 Married with Young Kids
Kids age less than 10 years

 Married with Grown up Kids
Kids age more than 10 years

 Close to Retirement or Retired

12:30

 MAX LIFE
BY LIFECUP

Personal Details

Objective

Product Selection

Review

Life Stage & Objective

Please select what best describes the customer, & its insurance needs

 Young & Single

Customer is looking for

☒ Plan For Retirement

[KNOW MORE](#)

☐ Wealth Creation

[KNOW MORE](#)

☐ Protection

[KNOW MORE](#)

☐ Income

[KNOW MORE](#)

 Newly Married

Next

 Married with Grown up kids

 Close to Retirement or Retired

Designs

12:30





Personal Details

Objective

Product Selection

Review

Select Product

Customer is 'Young & Single' and looking for 'Retirement Plan'
Please select suitable insurance product



Max Life Savings Advantage Plan
UIN3423434242



Max Life Fast Track Super Plan
UIN3423434242



Max Life Flexi Wealth Plus Plan
UIN3423434242



Max Life Assured Wealth Plan
UIN3423434242



Secure Capital Builder Super
UIN3423434242

12:30





Personal Details

Objective

Product Selection

Review

Select Product

Customer is 'Young & Single' and looking for 'Retirement Plan'
Please select suitable insurance product



Max Life Savings Advantage Plan
UIN3423434242

Product Related Downloads

[Key Features](#) [Sales Story 1](#) [Sales Story 2](#) [Brochure](#)

Proceed



Max Life Fast Track Super Plan
UIN3423434242



Max Life Flexi Wealth Plus Plan
UIN3423434242

12:30





Login

Details

Goal & Product

Review

Premium Payment Details



Max Life Fast Track Super Plan

Payment Term (Yrs)

Policy Term (Yrs)

10 Years

Select

Mode Of Payment

Dividend Options

Select

Select

Premium Commitment

₹

Dividend Adjustment

Effective coverage date

Riders

Accidental Death And Dismemberment Rider

Remove

Add Amount

12:30





Login

Details

Goal & Product

Review

Premium Payment Details



Max Life Fast Track Super Plan

Payment Term (Yrs)

Policy Term (Yrs)

Select

Select

Mode Of Payment

Dividend Options

Select

Select

Payment Term(Yrs)

☐

7 Years

☒

10 Years

☐

15 Years

☐

20 Years

☐

25 Years

☐

30 Years

Designs

12:30

Login

Details

Goal & Product

Review

Premium Payment Details

 Max Life Fast Track Super Plan

Payment Term (Yrs)Policy Term (Yrs)

Edit Address

Payor Address

House / Flat / Area*

Landmark

Pin Code*City*

State*Country*

Cancel

Save

12:30

Login

Details

Goal & Product

Review

Premium Payment Details

ILLUSTRATION FOR MR. YUVESH

Name of the Prospect/Policyholder:	Mr. Yuvesh	
Age & Gender:	40 Years, Male	
Name of the Life Assured:	Mr. Yuvesh	
Age & Gender:	40 Years, Male	
Policy Term:	35 Years	
Premium Payment Term:	20 Years	
Amount of Installment Premium:	₹6,69,366	
Mode of payment of premium:	Annual	

Download

☒ I have gone through the contents of the benefit illustration and understood it completely & hereby confirm that i wish to proceed further

*Please note that the benefit illustration can not be edited once email is initiated to the customer

☒ Request For Email Taken Successfully

Resend Email

Proceed

12:30

Please confirm the bank account for all payouts to be credited, in case you submit your proposal for insurance.

Account Number	Account Type
13132434554	Current
Branch	IFSC Code
Hadapsar Pune	UTIB0000404

Account Number	Account Type
13132434554	Current
Branch	IFSC Code
Hadapsar Pune	UTIB0000404

☒ Thanks!
Your data has been saved.

Resend Email

Submit

The transaction cannot be processed further without customer's consent on the shortened URL sent to customer's registered mobile number and email id.

12:30

Please confirm the bank account for all payouts to be credited, in case you submit your proposal for insurance.

Account Number	Account Type
13132434554	Current
Branch	IFSC Code
Hadapsar Pune	UTIB0000404

☒ Thanks!
Your data has been saved.

Thank You For Your Valuable Time Today

Please note the transaction ID
4000000853

Ok, Got It

To view entire flow/screens of final design pls visit below link

Thanks