UX Case Study

Reducing customer complaints about mortgage insurance

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Reducing customer complaints about mortgage insurance

Customers frequently complain about mortgage insurance and the process for having it removed

Problem Statement & Hypothesis (understanding our customer's perspective)

- A change in business process resulted in a significant rise in escalated complaints

- The foundational hypothesis was that restoring the original process would improve customer satisfaction

- The Product team engaged me to help them understand the customer perspective and why customers were particularly angry in their complaints about mortgage insurance

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Research (understanding our customer's perspective)

- I conducted User Research to understand customer's perception of their experience around mortgage insurance

  - Engaged User Research partners to collaborate on research planning & implementation

  - Listened to a random sample of call recordings from customer complaints

  - Participated in Customer Interviews to capture individual experiences

  - Research findings indicated customers didn't adequately understand mortgage insurance, it purpose, and the value it provided; nor did they have reasonable expectations about the requirements for having it removed

  - Research Outputs: Customer Journey Maps, Customer Insights, Customer Pain Points

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Product Discovery (understanding customer perspective & complaint drivers)

- I facilitated Design Thinking Workshops with the Product team and subject matter experts

- Activities included defining current state experience, reviewing user research, identifying points of pain, ideating on ideal future state experience, building a prioritized list of features

- We validate concepts ideas with customers to measure alignment with expectations

- Discovery Outputs: Documented & Agreed Upon Current State, Future State Experience Blueprint, Concept Illustrations, Story Boards, Prioritized Feature List, Implementation Roadmap