

USER EXPERIENCE

Competitive user journeys

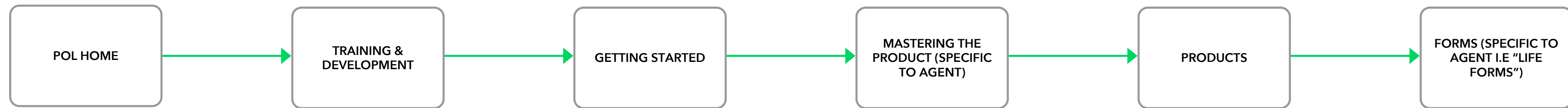
Scenario 1:

A new member of Primerica/LS has joined and is in the back office for the first time.

They want to learn how to run their business, and to get the forms they need for their product.

Primerica

- Everything for new associates clearly within one site including resources
- Forms were located within product sections



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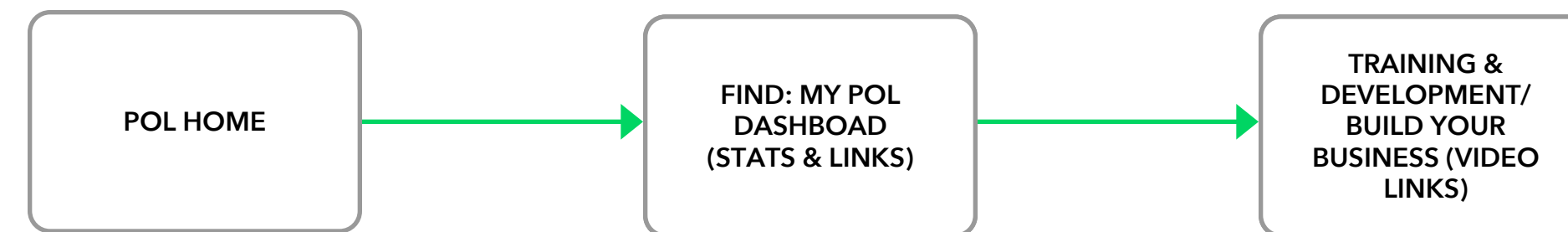
- While the same length as the Primerica flow, user's needs are broken up between multiple sites, making for an inconsistent experience
- Resources and education are presented as link lists, no information is surfaced for users, and no hierarchy is presented
- Forms lived within their own site with other items instead of product sections



Scenario 2:
Primerica/LS Associate of about
one year who wants to check on
their stats, and get some business
tips

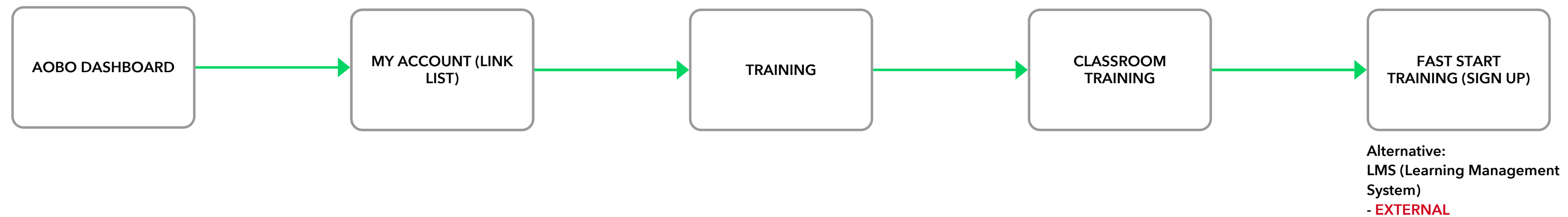
Primerica

- Stats live in a separate place from the homepage but are grouped together
- Important Stats surfaced on Dashboard with links to other stats
- Links directly to videos for training & Development to help associates grow



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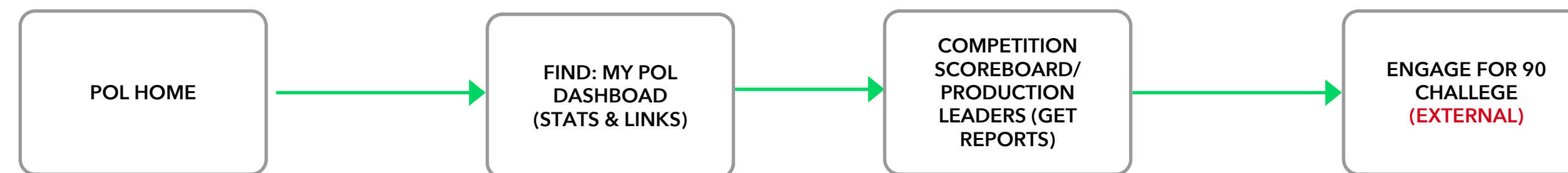
- Some stats present on dashboard, to access more users must go through “my account” where they are presented with a link list
- The two training options:
 - A- Fast Start - Not immediate, sign up for a class, doesnt help in the here & now
 - B - LMS - External site, inconsistent experience, have to filter through for the right information



Scenario 3:
Experienced Primerica/LS
Associate who wants to view their
stats and check in on their
competition

Primerica

- Associates can filter within the leaderboard to see different reports



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- There are a number of different Leaderboards all on separate, external sites

