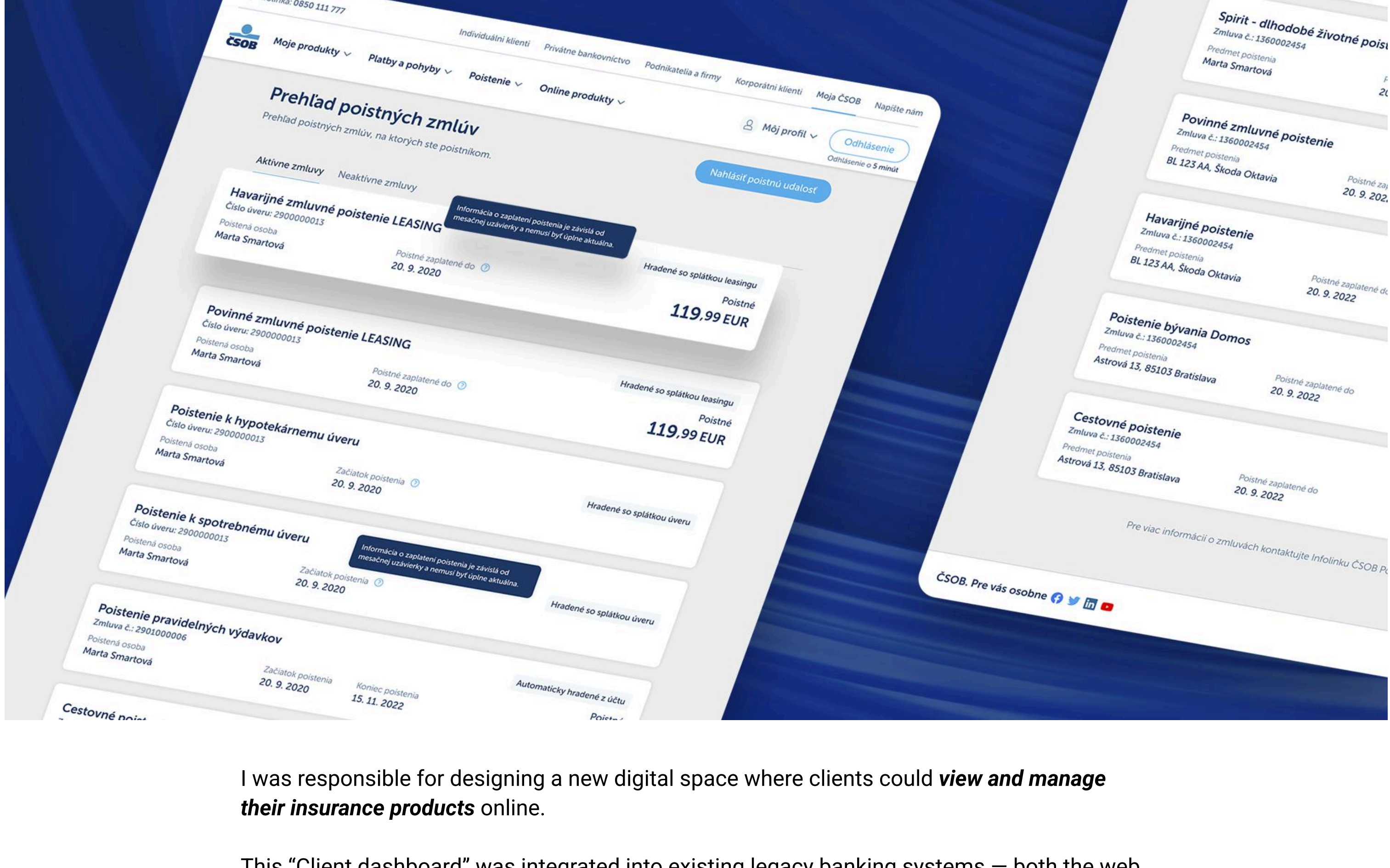


One Dashboard to Rule Them All

Agency
ČSOB Insurance

Year
2022-2023

Role
Lead Designer



I was responsible for designing a new digital space where clients could **view and manage their insurance products** online.

This “Client dashboard” was integrated into existing legacy banking systems — both the web portal and the SmartBanking mobile app — and had to serve both banking clients and insurance-only users with very different expectations and levels of digital experience.

I worked across product, legal, research, and development teams — translating technical and legal requirements into user-centered flows and designing **scalable UI and UX patterns** that would hold up across future product expansion.

The Challenge

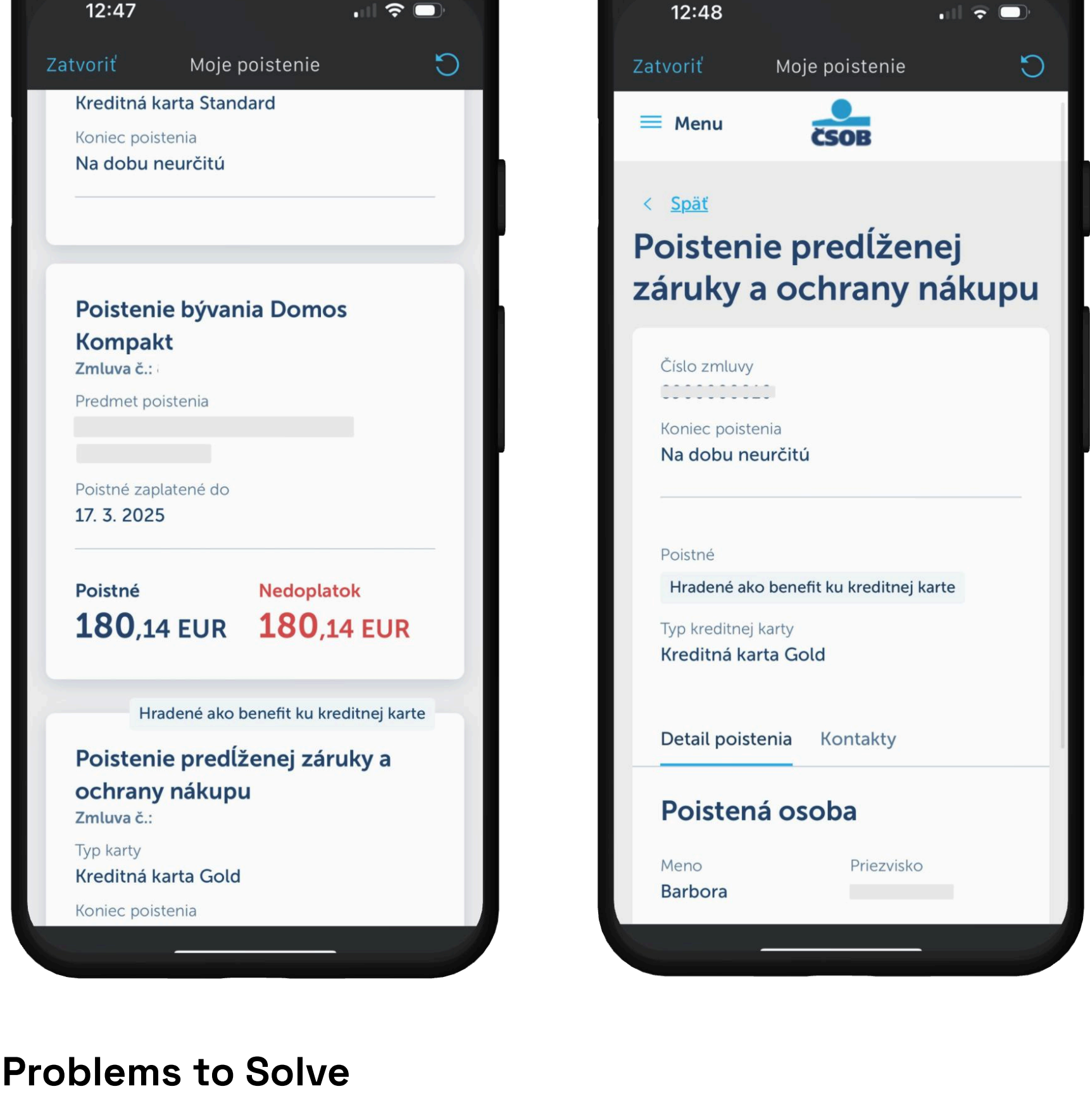
This was more than a dashboard — it was a **platform-wide integration that bridged the gap** between banking infrastructure and insurance-specific needs.

While ČSOB's banking clients were familiar with SmartBanking and digital services, insurance-only clients were often older, more conservative, and unfamiliar with online tools.

They needed reassurance, simplicity, and transparency.

I had to design for:

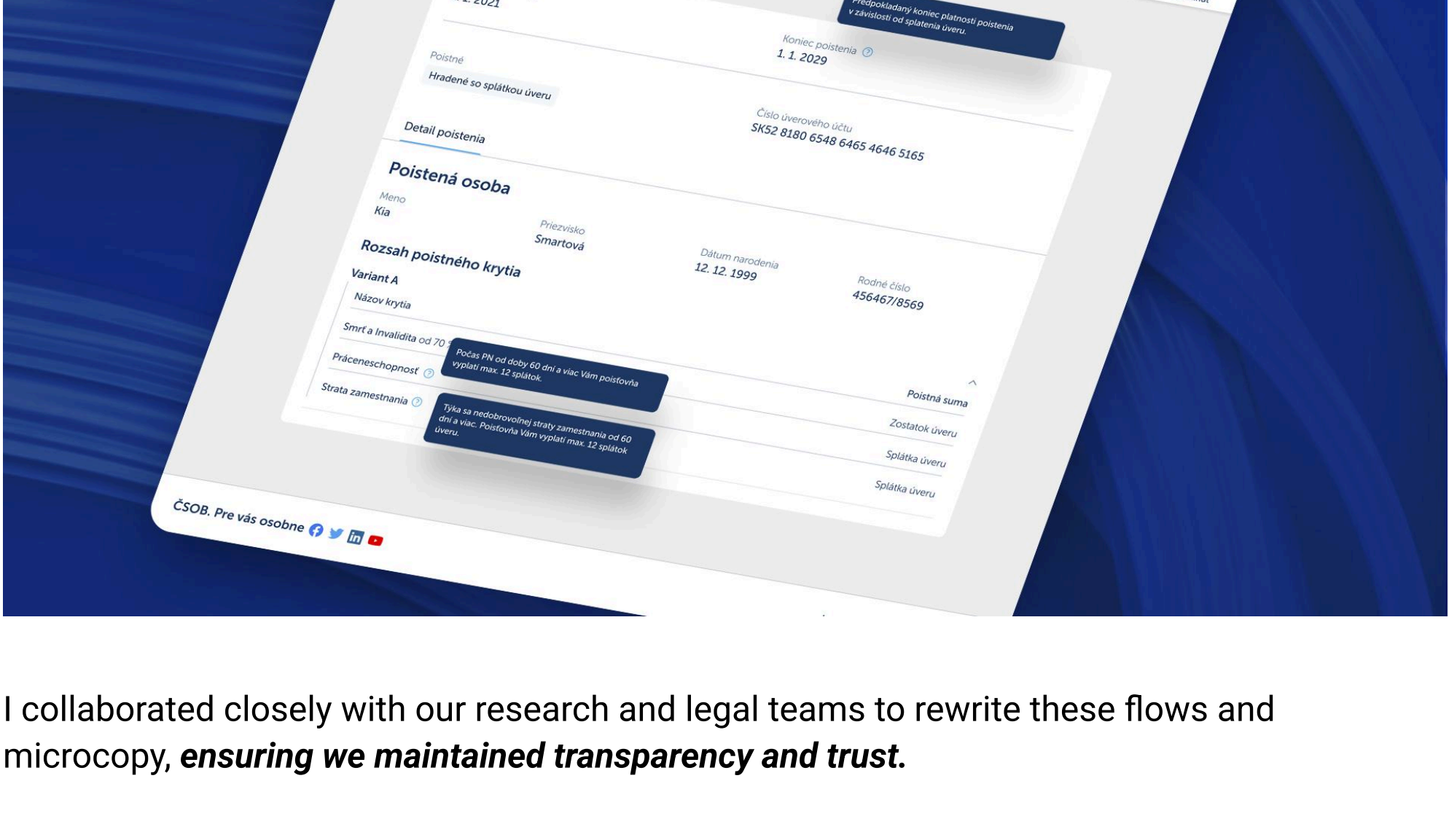
- Users entering through very **different access points** and use cases
- Strict **legal content** that couldn't always be simplified
- An architecture that would function inside **two structurally different systems**: a full web-based banking platform and a smartbanking mobile app
- A heavily siloed **internal structure**,
- From user trust to navigation logic, we had to build a coherent, consistent UX in a space that had never existed before.



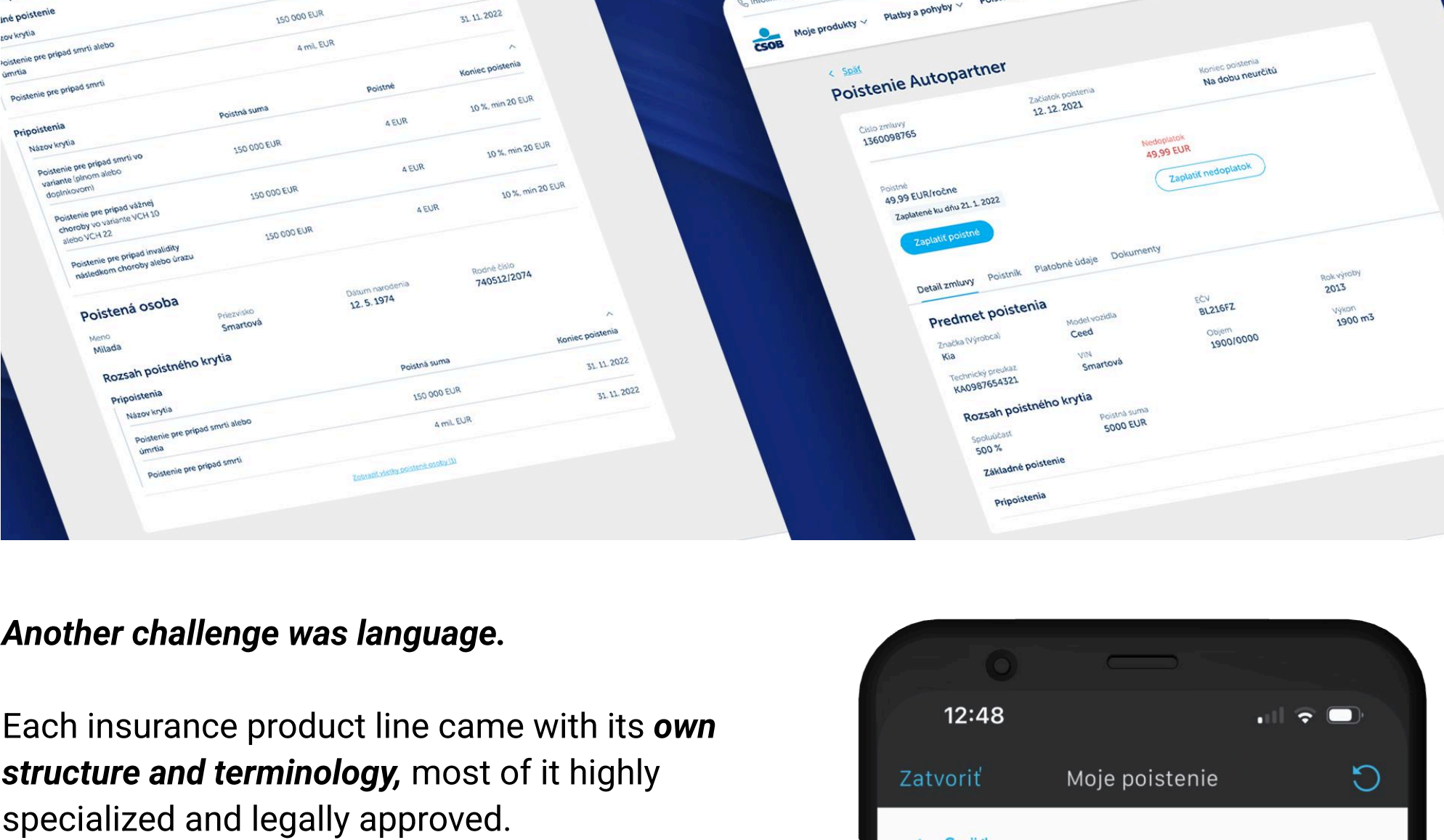
Key Problems to Solve

One of the most sensitive UX challenges was **onboarding users** who didn't have a banking account.

While technically required to create a lightweight profile through the bank's SSO system, we needed to communicate this clearly — **without making users feel like they were being pushed into** a banking relationship.



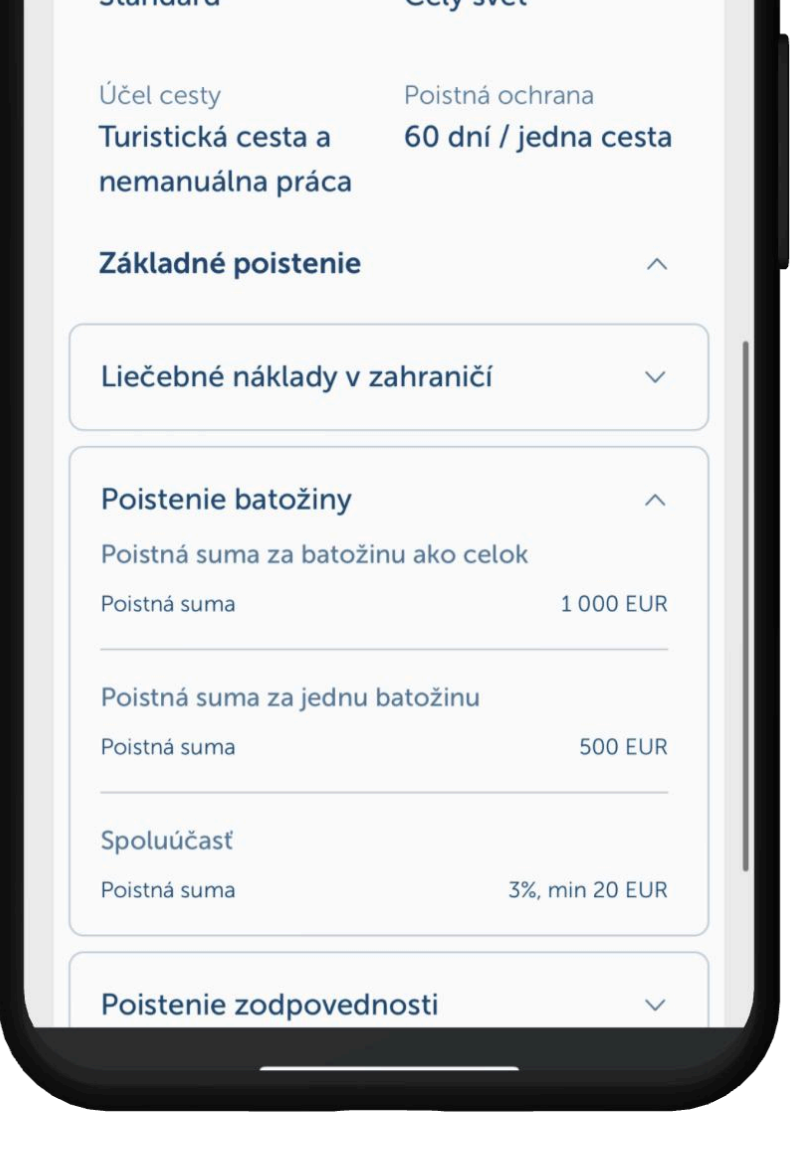
I collaborated closely with our research and legal teams to rewrite these flows and microcopy, **ensuring we maintained transparency and trust**.



Another challenge was language.

Each insurance product line came with its **own structure and terminology**, most of it highly specialized and legally approved.

I worked closely with our internal “translator” — a product manager who helped interpret legal content — **to restructure and rewrite complex information** in a way users could understand, especially on mobile where space was limited.



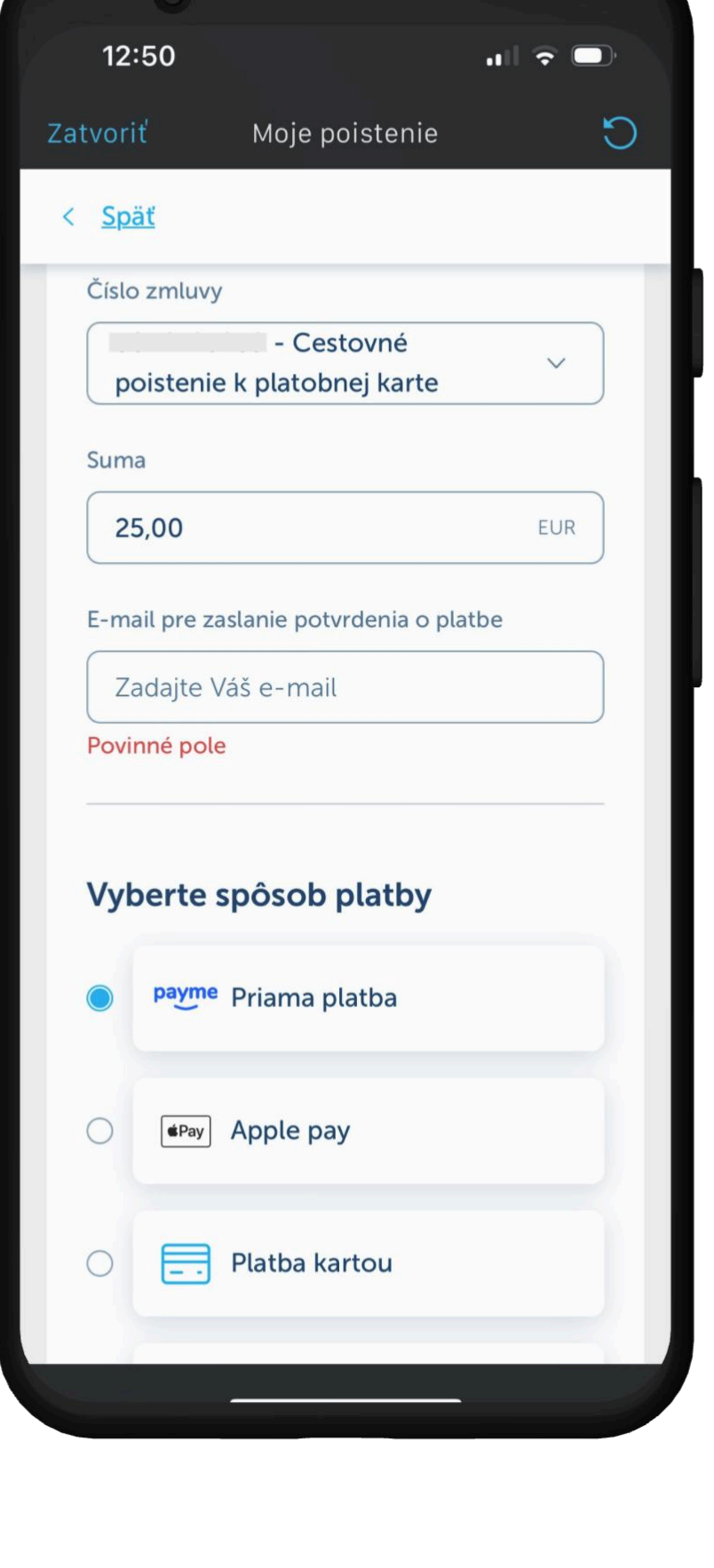
Research

I reviewed existing personas, but supplemented that research by **analyzing multiple competitor platforms** — both locally and internationally.

I signed up for other insurers' client zones, compared UX patterns, and evaluated onboarding flows, document handling, and claims management to identify best practices.

In parallel, I created a structural map of the full platform — **covering current scope and long-term possibilities** — to help stakeholders align around a scalable, modular language.

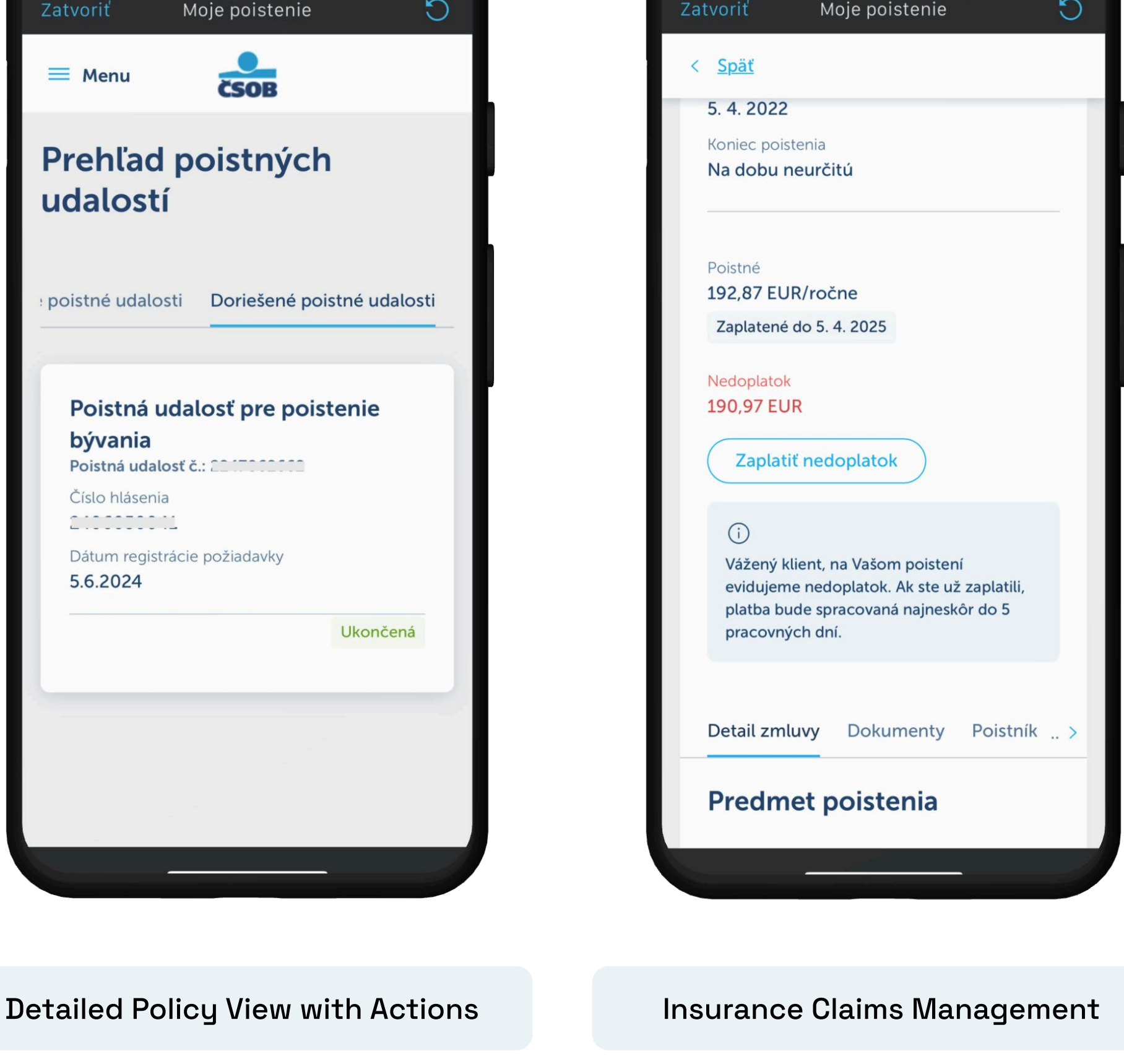
This map helped clarify prioritization for Phase 1 while also informing planning for future features.



Key Features

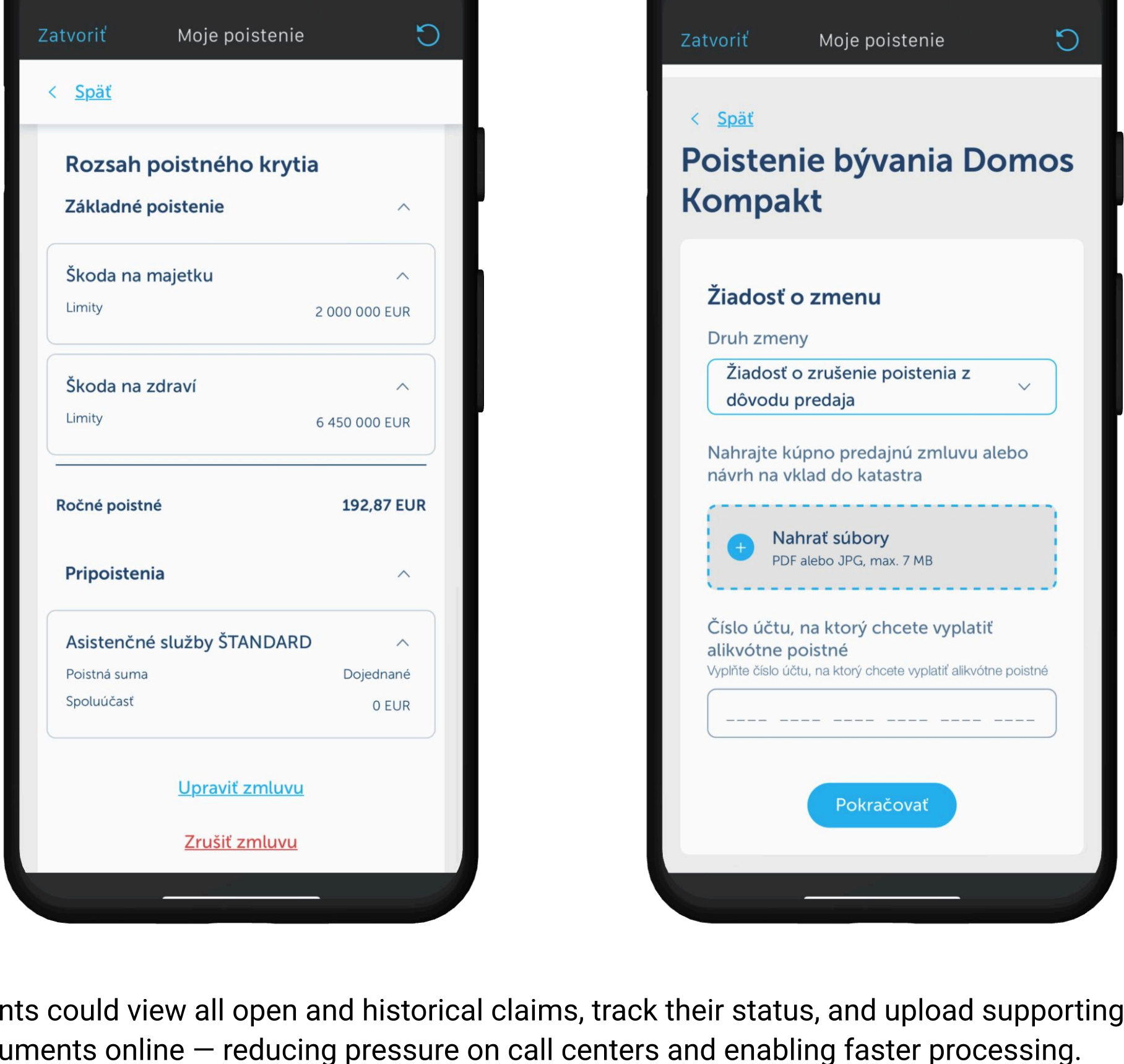
Unified Insurance Overview

Clients could see all active and archived insurance contracts in one place — clearly grouped, accessible across devices, and easy to scan. I designed the layout to work responsively across desktop and mobile.

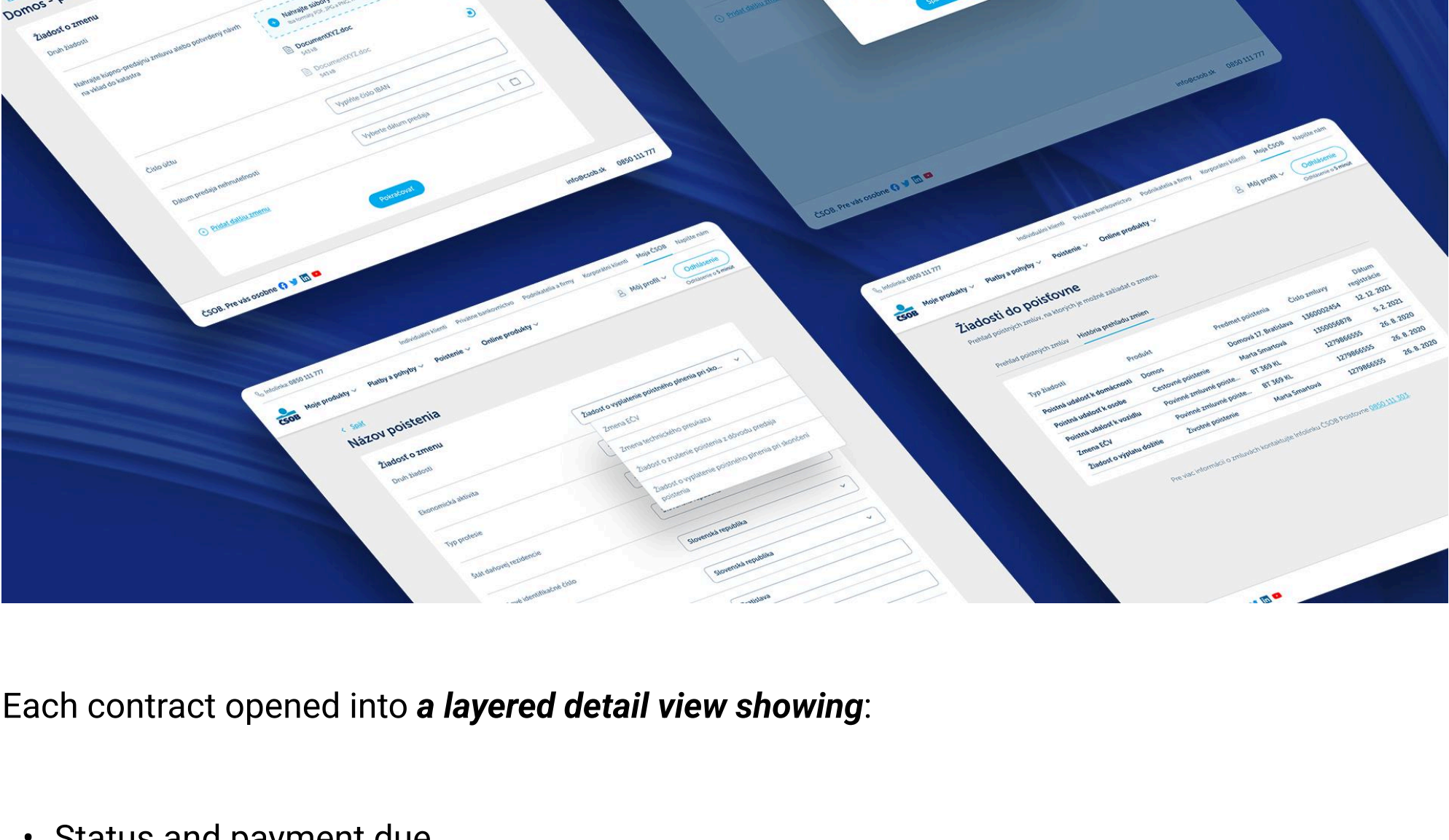


Detailed Policy View with Actions

Insurance Claims Management

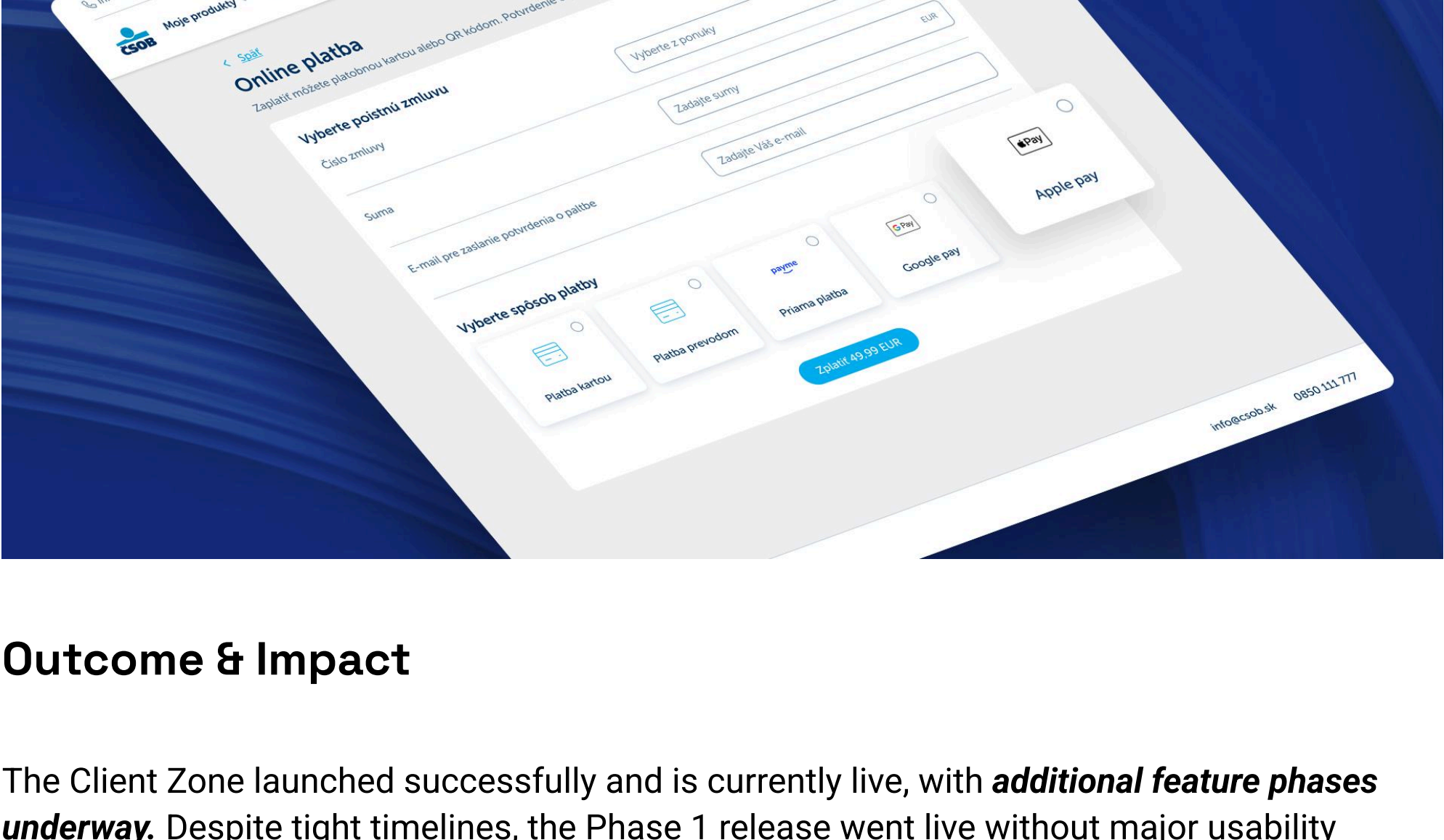


Clients could view all open and historical claims, track their status, and upload supporting documents online — reducing pressure on call centers and enabling faster processing.



Each contract opened into a **layered detail view showing**:

- Status and payment due
- Online payment option
- All related documents in structured, downloadable format
- Collapsible sections to handle legal data and improve scanability, especially on mobile.



Outcome & Impact

The Client Zone launched successfully and is currently live, with **additional feature phases underway**. Despite tight timelines, the Phase 1 release went live without major usability issues. Post-launch, our structure and architecture were adopted for the next phase of development — including detailed contract views, agent info, and cross-product visibility.

Internally, **the dashboard became a unifying platform** across previously siloed product departments. Teams began to adopt shared UX language and aligned more easily around a single client experience.

From a personal perspective, this project deepened **my experience in working with complex enterprise systems**, stakeholder management, and navigating the tension between legal requirements and user clarity. It also reinforced the value of taking initiative — from questioning vague briefs to proactively shaping scalable product foundations.

