# Case Study: Successor Agent

## Problem Definition:

Develop a usable interface to walk Agents through a complicated process of transferring their book of business to multiple agent successors.

The selection process needed to be flexible enough to transfer individual clients, transfer by state, transfer by business type and by policy type.

## Methodology:

- Iteratively develop wireframes in conjunction with subject matter experts.
- Develop a stepped process based on a detailed task analysis.
- Develop an interactive prototype to insure ease of navigation
- Develop semantic HTML to support the effort.

## Outcome

1. Progressive disclosure for fields and information was implemented to chunk a difficult process into task areas.
2. An application flow and navigational structure was developed using a stepped process to break down complicated tasks.
3. Consistent navigation was developed to lead the user through the infrequently used application process.