

The Future is Mobile: A UX-Led Customer Experience

Leveraging the Direct Quote Form to
Kickstart Mobile Performance Tracking and Innovation

Mobile Design, UX UI, CX.

Problem / **Solution**

Research Observation and Strategic Recommendation

Problem:

Over 50% of our traffic comes from mobile, and while our site utilizes Bootstrap UI's built-in mobile framework for efficiency, certain experiences, like the Direct Quote Form, demand a more tailored approach. Without optimization, we risk missed opportunities for engagement, lower conversion rates, and ultimately, lost revenue.

Solution:

To stay competitive and meet customer expectations, the solution is a UX-led mobile design approach.

Example: Just as our Paid Landing Pages have benefited from tailored UX optimization, the Direct Quote Form requires a custom approach to fully leverage our existing mobile traffic, drive engagement, and maximize conversions.

Not just a UX initiative.

This is a Business Initiative. A Customer Experience Initiative.

An initiative that determines whether we remain relevant in an era where mobile is the gateway to trust.

Customer Focused Experiences.

Imagine a world where a customer visits our site, they glide through a seamless, intuitive mobile journey. In such a world, conversion rates go up. Customer satisfaction goes up. And most importantly, **trust in our brand goes up.**

We've built the Direct Quote Form with efficiency in mind. But efficiency is not enough. Our customers don't just want to complete a form, they want an experience that respects their time, adapts to their needs, **and meets them where they are – on their mobile devices.**

Key Metrics - Primary & Secondary KPIs

Part 1. Primary KPI: Quote-to-Purchase, Conversion Rate.

Five analytics platforms track performance from different angles. Each captures a slice of the picture. What's needed is a direct connection between core design changes and measurable business impact - and a framework to make that connection visible.

Recommendations.

Before visualizing performance, tracking must be aligned to what launched and when. Without that foundation, design impact cannot be accurately attributed or replicated.

Key Metrics - Primary & Secondary KPIs, continued...

This framework is designed to evolve as performance data accumulates and patterns emerge.

Date Range	Total Quotes Started	Total Quotes Completed	Total Purchases	Quote-to-Purchase Conversion Rate (%)	Mobile Quotes Started	Mobile Purchases	Mobile Conversion Rate (%)	Desktop Quotes Started	Desktop Purchases	Desktop Conversion Rate (%)
March 1-7	500	450	150	33.33333333	250	75	30	250	75	30
March 8-14	520	480	160	33.33333333	270	85	31.48148148	250	75	30
March 15-21	540	500	170	34	290	95	32.75862069	250	75	30
March 22-28	560	530	180	33.96226415	310	100	32.25806452	250	80	32

This sample table style will:

Reveal patterns in seasonality – ensuring we don't misattribute dips in performance to design.

Show us if mobile vs. desktop behaviors differ – so we can optimize for actual user **habits**.

Validate UX improvements – proving that design changes drive revenue, not just aesthetics.

We can refine what we need as a team, as we learn along the way.

Part 2. Secondary KPIs

1. **Form Completion Rate** – Percentage of users who start and complete the quote form.
2. **Drop-off Rate per Step** – Identifies where users abandon the form. Using, Google Analytics.
3. **Mobile vs. Desktop Conversion Rate** – Compares performance across devices.
4. **Time to Complete Quote** – Measures efficiency and user friction.

Mobile Design Solution, for DTC Websites. Part 1 - Homepage

Research-Informed Design Decisions with Measurable Conversion Impact

Recent UX research by James Foster revealed that something as subtle as adding a border around a word-based menu significantly increased conversion rates—without relying on a traditional hamburger icon.



Mobile Menu Button Performance

Variations	Conversion Rate	Improvement
 Menu	2.7%	+12.9%
 Menu	2.6%	+5.7%
	2.4%	---
 Menu	1.9%	-22.2%

This is one of several research-informed insights applied to the mobile design strategy, benchmarked against top industry competitors including Progressive, Allstate and Geico.

A UX conversion reflects when a user successfully completes an online action, like filling out a quote form, while an insurance Agent Conversion occurs when that lead is later closed into a policy by a human rep.

Part 2. Mobile Direct Quote Solution. Personal Auto.

1. **Streamlined 5-Step Approach.** Modeled after a proven high-performing quote flow, applying what worked at scale to the personal auto experience.
2. **Intuitive Navigation & Editability.** Users can **go back and adjust any step** without losing progress, reducing frustration and form abandonment.
3. **Enhanced Accessibility & Contrast.** Form fields and buttons feature **high-contrast, accessible design**, outperforming third-party vendor solutions in accessibility and usability benchmarks.
4. **Trust-Based CTA Button Colors.** **Blue buttons for Personal Auto** and **Green buttons for Commercial Vehicles**, leveraging **color psychology** to reinforce confidence and reliability.
5. **Seamless Customer Support Integration.** A **call-in option** is available at every step, mirroring the successful approach from our Commercial Vehicle Quote Form.

Innovation Roadmap. Recommended Features for Conversion and Retention.

STRATEGIC RECOMMENDATIONS FOR THE NEXT PHASE OF MOBILE EXPERIENCE DEVELOPMENT.

1. **SMS Support.** **SMS-based follow-ups** for users who abandon the form (e.g., *"Still need a quote? Click here to continue where you left off."*).
2. **Reminders.** **Through the Auto-Save & Resume Later.** **Reminders via email or SMS** nudging them to finish their quote. **Scenario**—stuff happens. A user could be in the middle of filling out the form when they get a phone call, their WiFi cuts out, or they just get distracted. Instead of losing progress and starting over, our mobile experience ensures their data is saved automatically. **Example Text**, Hey Juan, life gets busy! Your quote is ready when you are. Click to continue where you left off.
3. **Click-to-Call & Voice Input.** **Voice-to-text** for easy form filling (great for **accessibility** and multitasking users).
4. Can we use the existing identifier, without the text, [website name] at the bottom?