

Industrial- Based Research Proposal

Performance Dashboard
Design for Claims
Management

Industrial Based Research Proposal
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Project Rationale



High value personal injury claims in insurance

- handler data is key to performance



Managers require effective dashboards to monitor individual and team KPI metrics



Research on manager preference in dashboard implantation in this context is limited



Gap in literature allows for user-centric exploration of dashboard design in this context

Business need

Need for operational data visualisation in high value motor insurance claims management

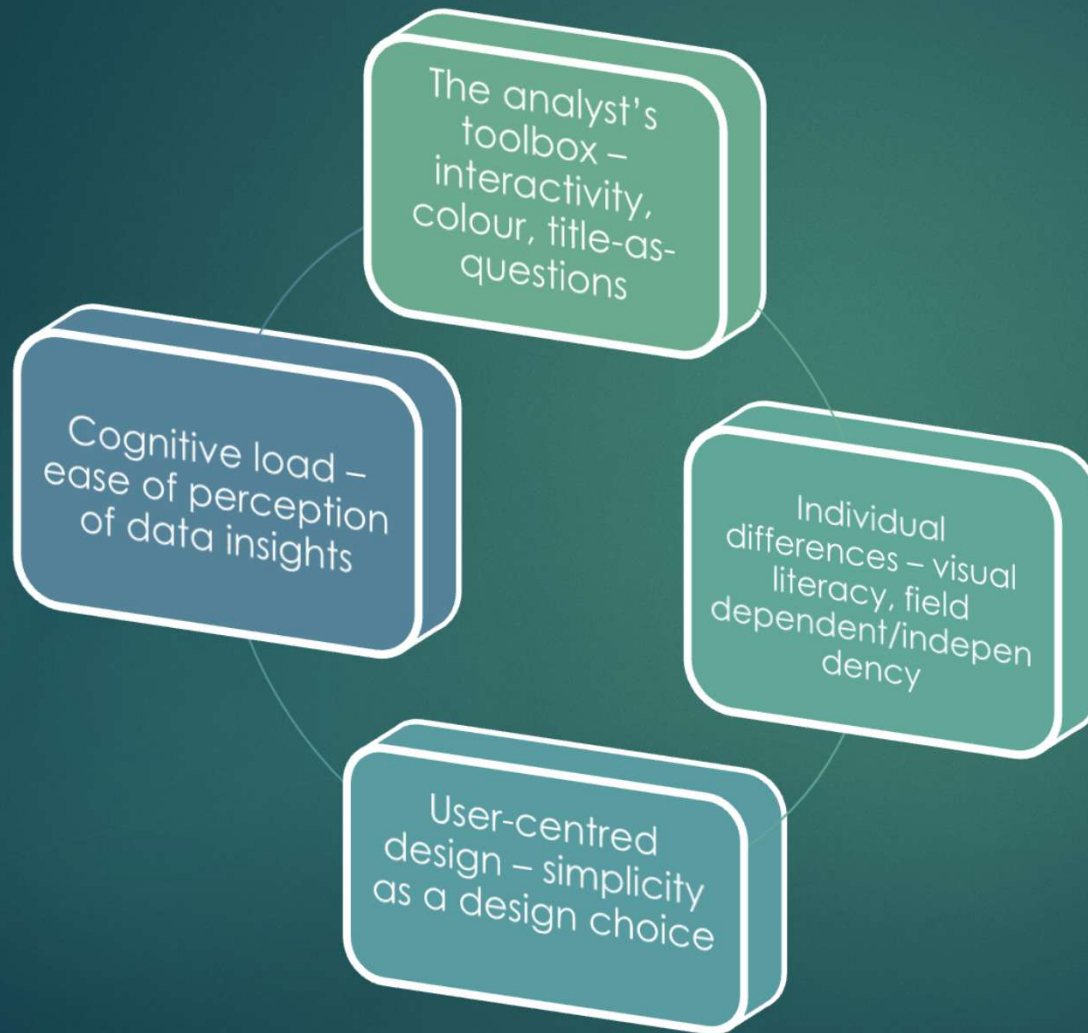
Academic Gap

Limited academic research on managerial dashboard preference in insurance context

Research Proposal

Design of operational data dashboards led by managerial preference

Literature Review



The research gap – no research found synthesised:

- Dashboard preference
- User-centred design
- Cognitive load considerations
- Effective visualisation techniques

In this specific context

What is the research aim?



Aim: To investigate visualization preferences in claims handler performance dashboards among team leaders in the defendant motor personal injury environment



Goal: To improve decision confidence among team leaders in this context

What are the objectives?

1

To critically analyse existing literature on dashboard usability, data visualisation literacy, and data-driven decision making in operational management environments, identifying theoretical frameworks applicable to performance reporting in claims handling contexts.

2

To evaluate current performance data reporting practices within the study organisation, examining the extent to which existing displays support team leader comprehension and decision confidence.

3

To engage team leaders and line managers in identifying team-specific KPI and reporting requirements to inform the design of aligned performance dashboards.

4

To design, develop, and evaluate team-aligned performance dashboards integrating telephony and task-completion metrics.

5

To assess the effectiveness of the performance dashboards created in improving team leader data literacy and decision confidence through pre- and post-intervention participant responses.

Research Methodology

Pragmatism

- Utility as core aim

Research
process

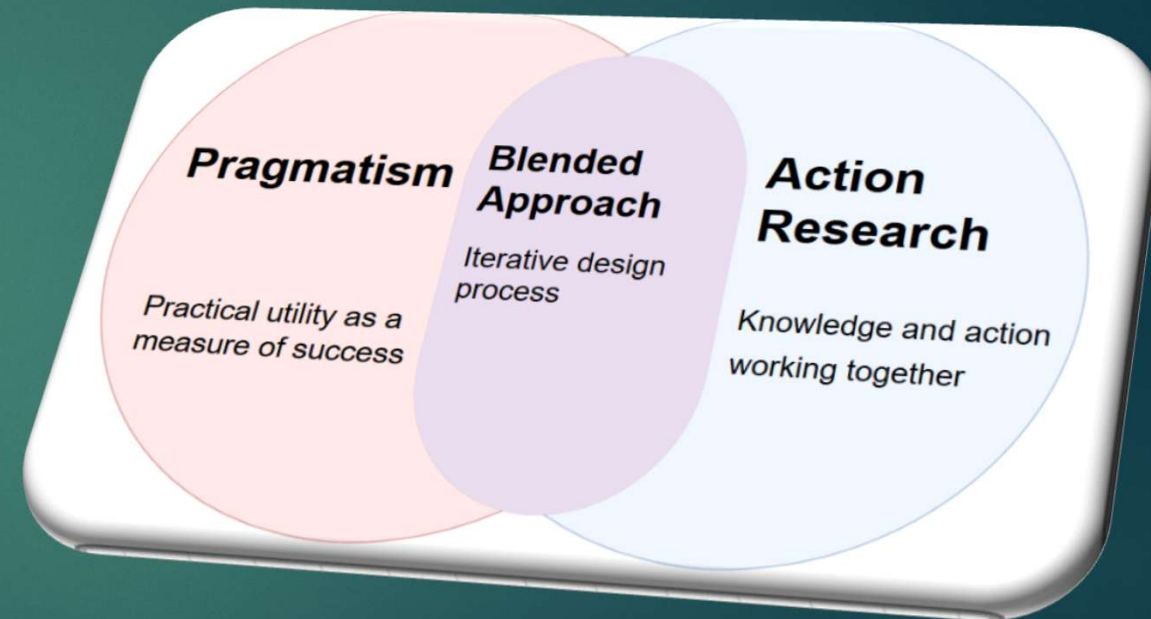
- Mixed approach

Action
Research

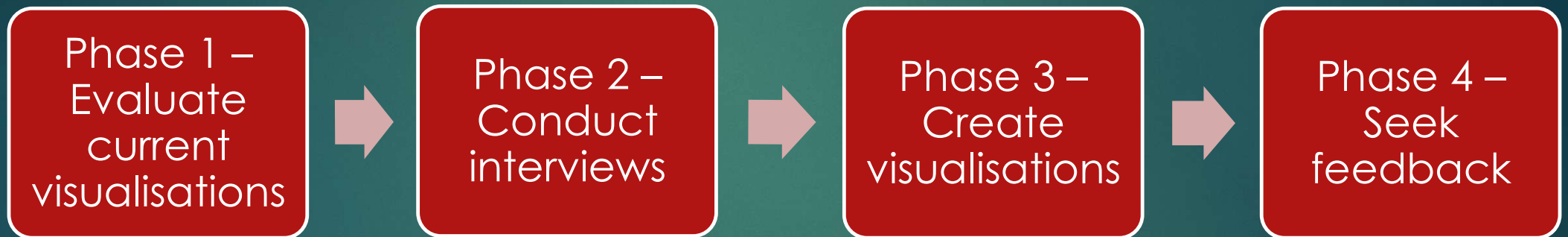
- Discover and act

Blended
Approach

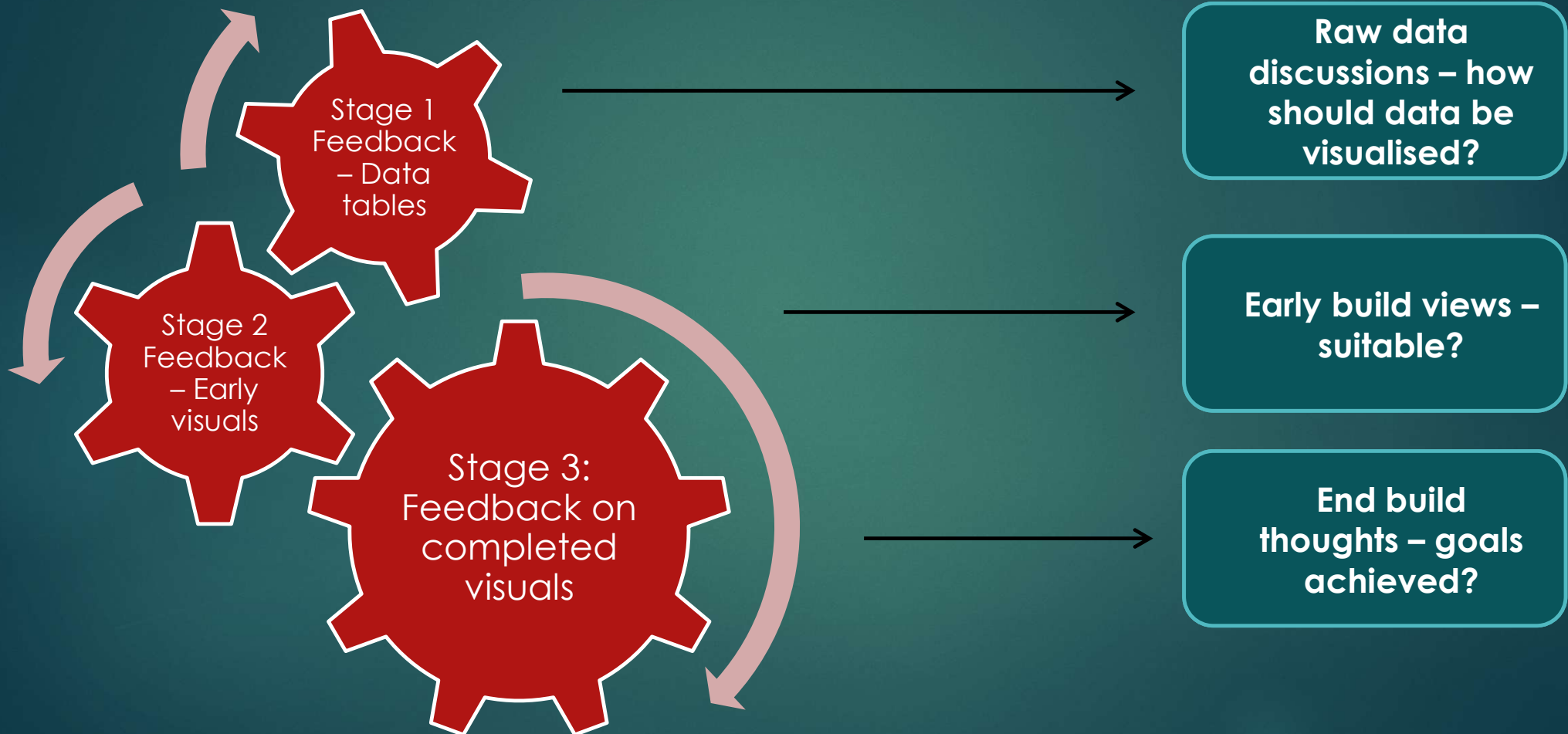
- Co-design 4 stage process



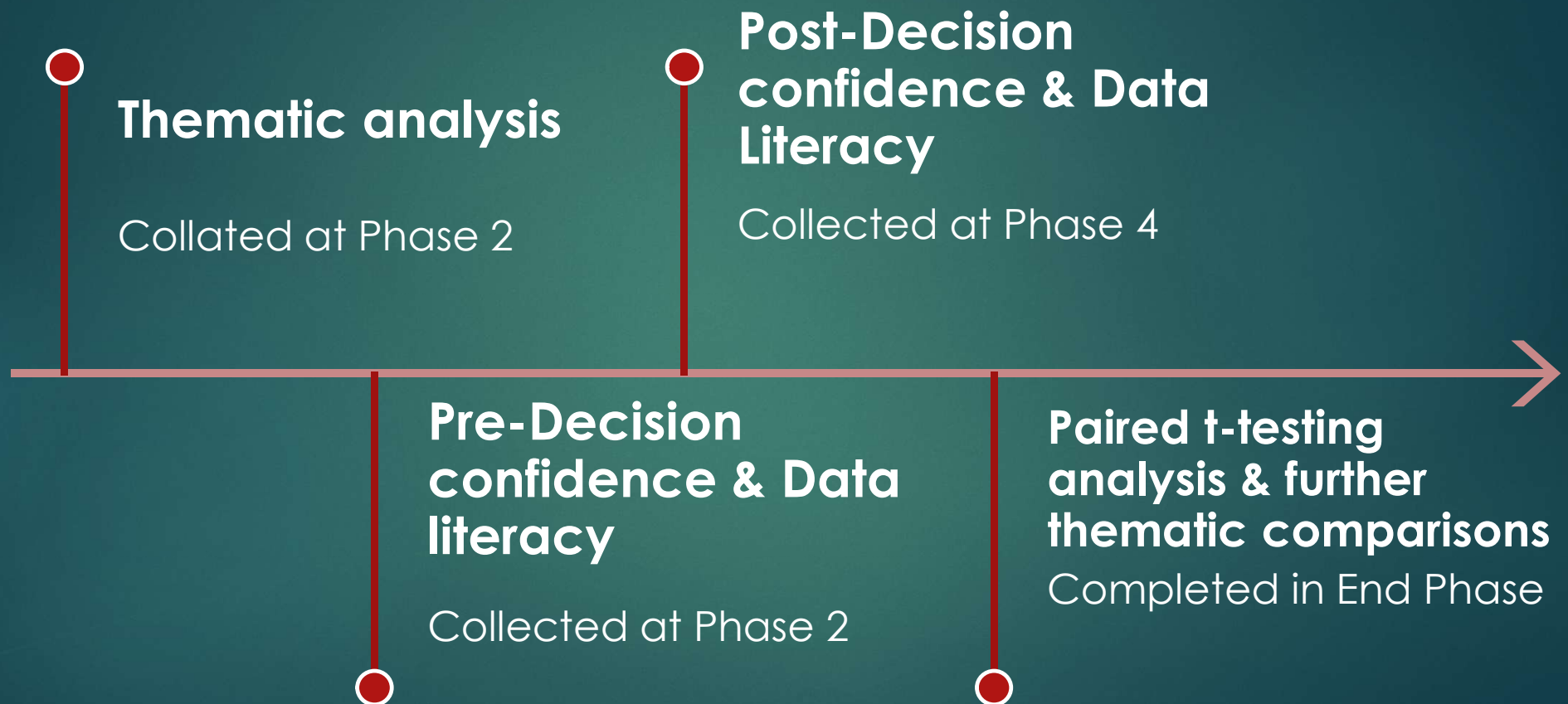
Project Phases



Dashboard Design: 3 Stages of Collaboration



Results: Data collection & Analysis



[illegible]

Costs: Resources & Budgeting

Manager time

- **Cost:** Time taken
- **Offset:** Organisational benefit

Software

- **Cost:** Licence fee
- **Offset:** Pre-existing work or education licence

Assistance

- **Cost:** Assistant to transcribe interviews
- **Offset:** Credit for assisting, small voucher

Project Impact

Time saved

Data
centralisation

Lower
cognitive
load

Better
decision
making

Corroborates
existing
findings

Adds to
iterative
design
theory

Bridges gap
in insurance
context

Informs
future
research

Limitations & Mitigations



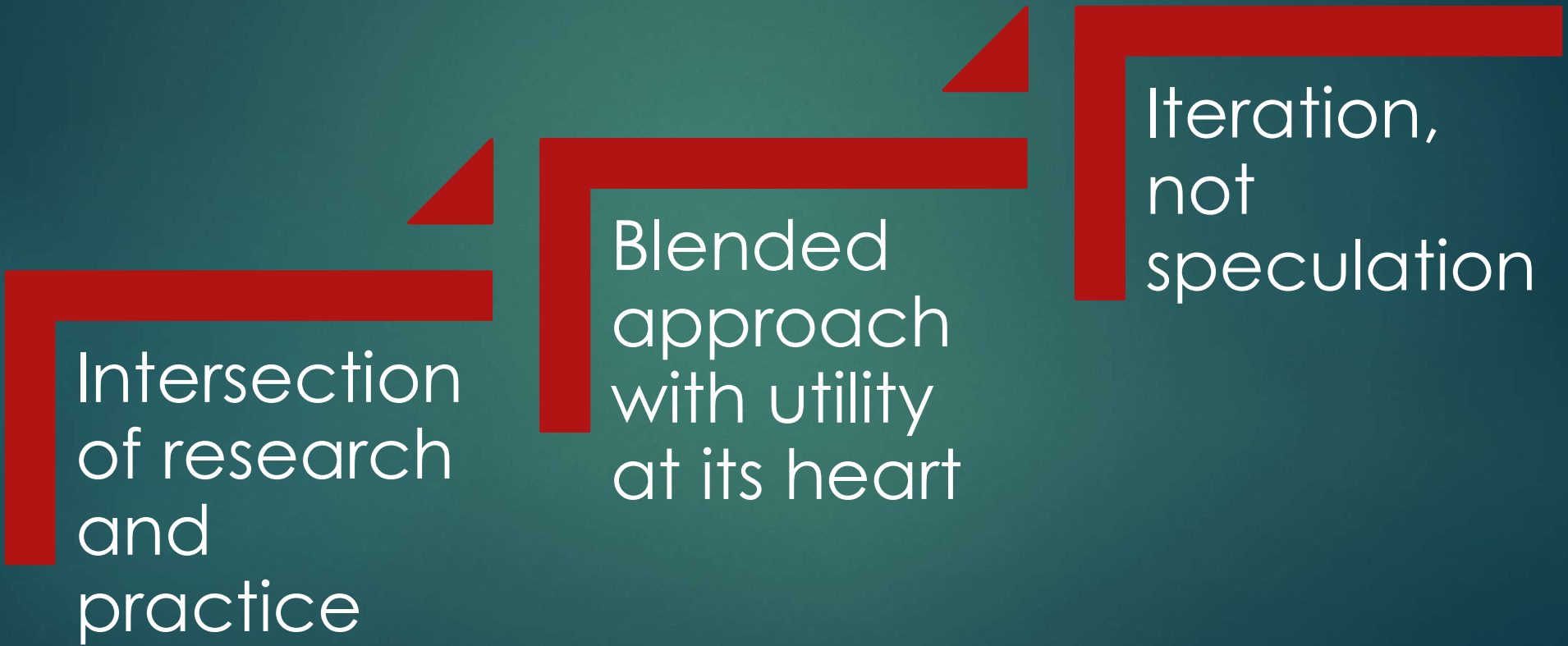
- Organisational constraint & sample size
- Limited project timeline & testing period



- Future research could expand scope
- Flexibility in timeline according to progress



Personal Reflection



Intersection
of research
and
practice

Blended
approach
with utility
at its heart

Iteration,
not
speculation

Thank you for attending

Thank you for attending my
presentation.

Questions?

References

NB. Below are a list of papers referred to in the project proposal and used to prepare and inform the contents of this presentation.

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