

FEATURED PROJECT

Journey Builder Pro

A connected platform for recruit onboarding, licensing, learning and team development.

PRODUCT

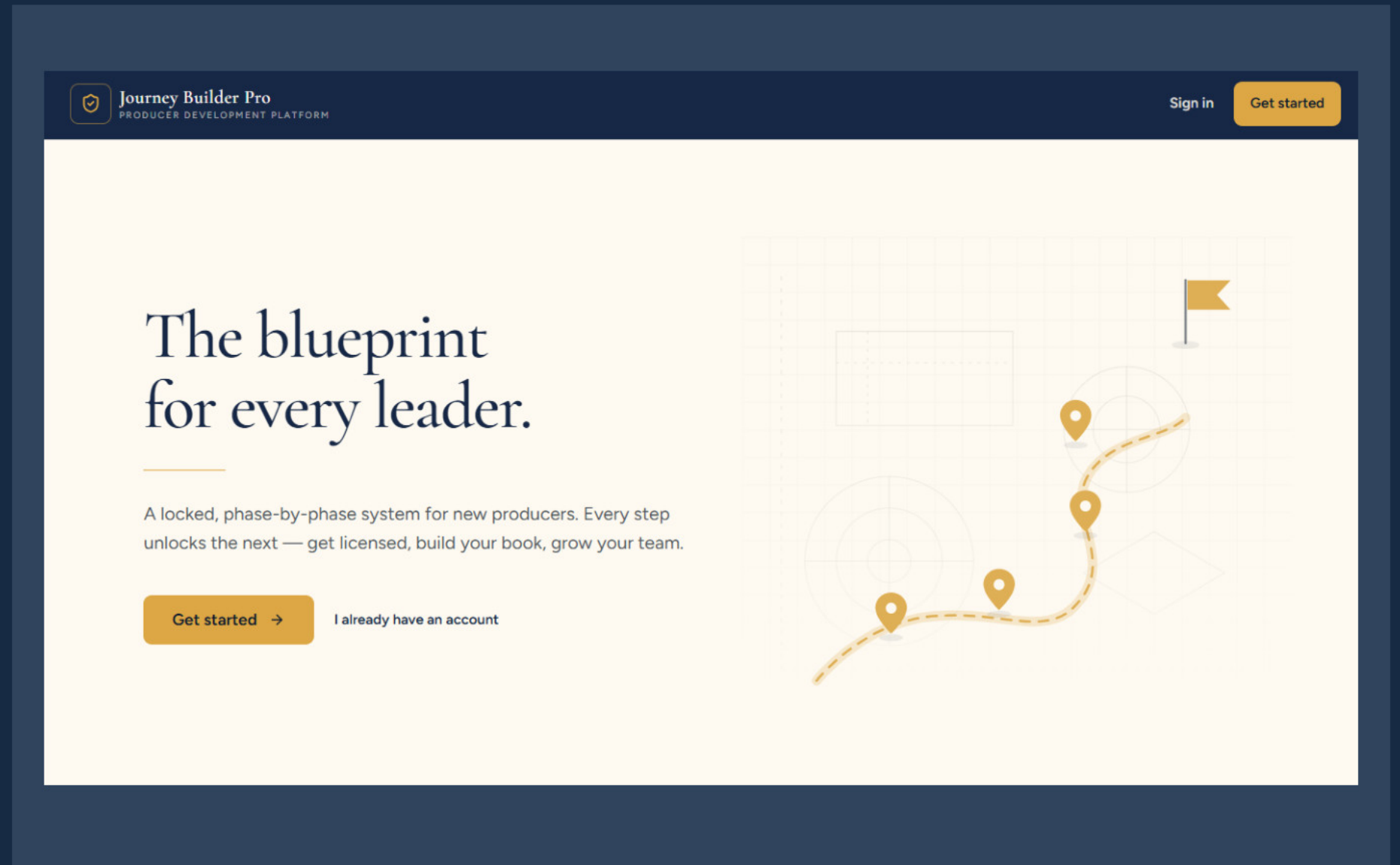
Training and team management

WORK

UX, development and integrations

CONTENT

Avatar-led learning videos



A clearer experience for recruits.
Better visibility for the people guiding them.

01 / THE BRIEF

Turn training into a usable system.

Improve an existing insurance producer training platform so people can learn, save their work, complete the right requirements and keep moving through their journey.

THE CHALLENGE

Important workflows were fragmented.

Saved work could be lost. Progress totals differed between views. Mobile navigation and notification actions needed attention. Access rules required strengthening.

WHAT WE DELIVERED

One connected learning experience.

Persistent recruit data, consistent progression, native quizzes, working communication flows, clearer leader tools and a cohesive interface across screen sizes.

6

training phases

3

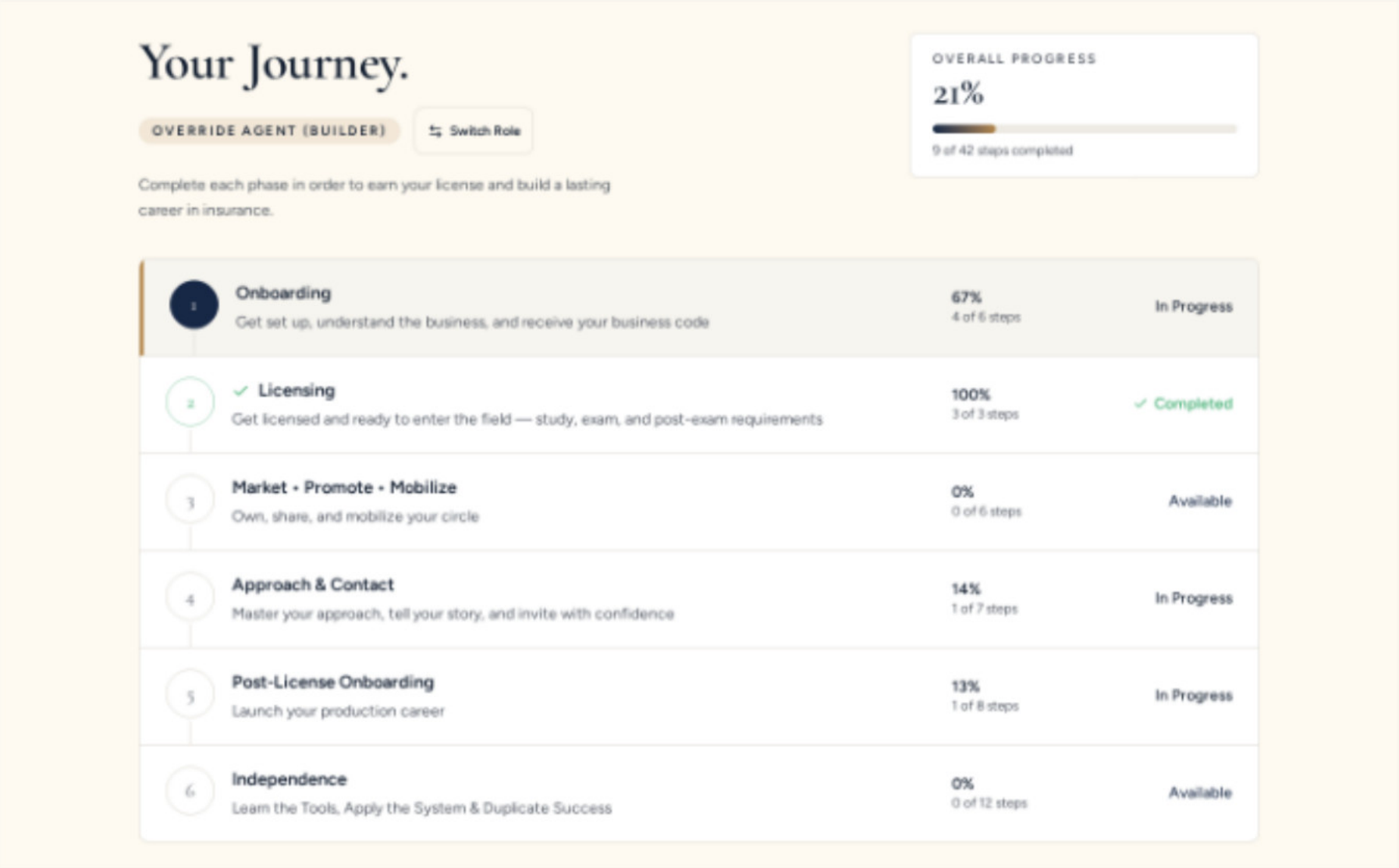
recruit routes

2

active Skill Transfer quizzes

02 / PRODUCT EXPERIENCE

A clear next step at every stage.



Captured journey interface showing phase status and overall progress.

01 **Visible progress**

Phase and lesson progress share consistent calculations.

02 **Purposeful access**

Routes determine phase eligibility; exam requirements protect post-license content.

03 **Lasting momentum**

Saved completion, activity-based streaks and aligned XP make progress meaningful.

03 / DATA THAT STAYS WITH THE USER

From names to a working inventory.

We connected contact capture and relationship profiling across the training journey, with persistent records, editing, filters and CSV export.

01	Market	Immediate or Later
02	Financial interests	Multiple areas of interest
03	Relationship	Type and closeness
04	Event assignment	A suitable invitation format

Capture.
Organize.
Return to it.

Story Builder responses and contact entries persist beyond a page refresh. Leaders receive read-only profiling summaries.

04 / TEAM VISIBILITY

Know where support is needed.

The leader experience puts the recruit roster first, supported by practical filters and readable activity summaries.

01 **A focused roster**

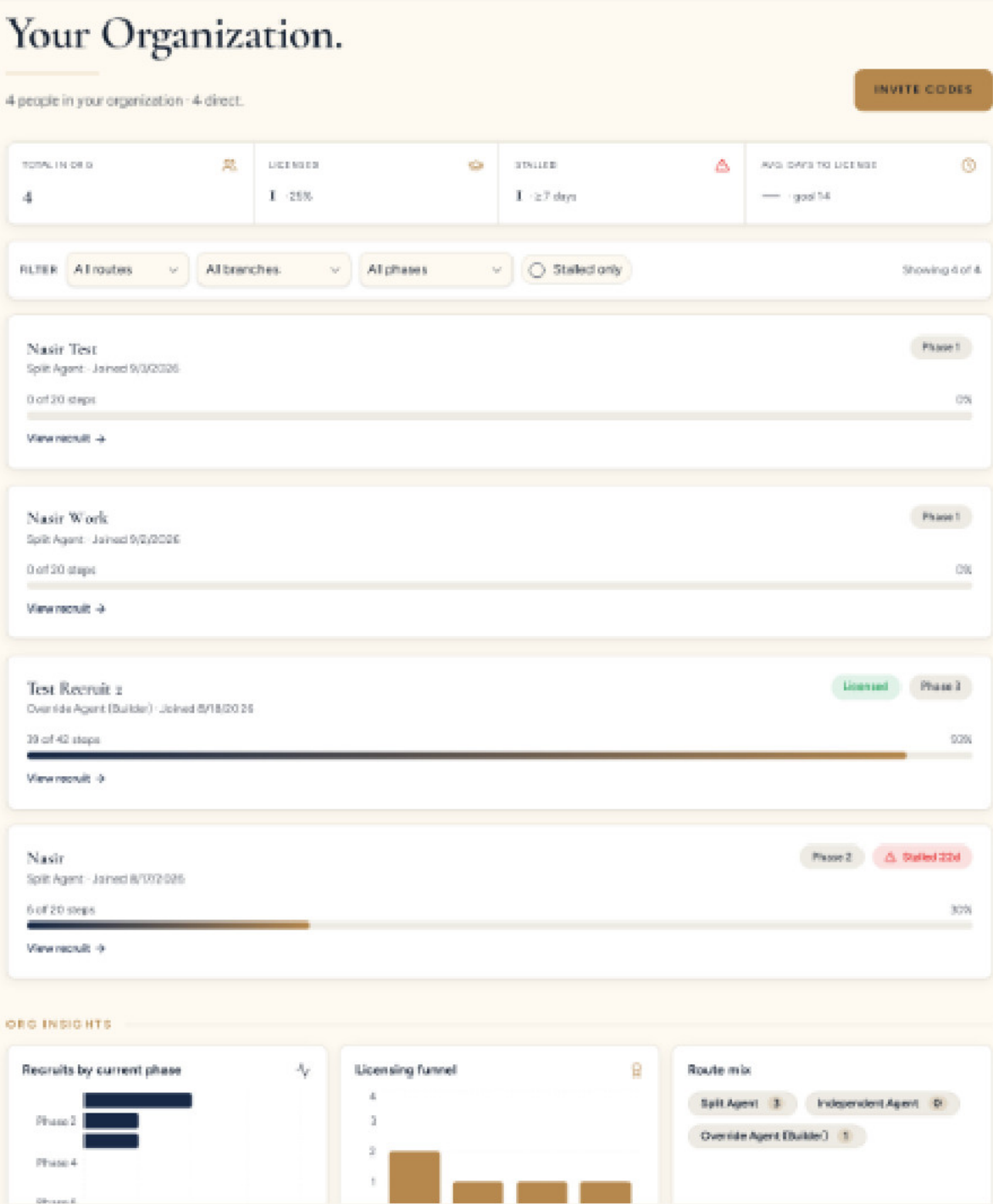
Filter by route, phase, branch and stalled status.

02 **Consistent reporting**

Aligned progress and licensing indicators across recruit and leader views.

03 **Connected follow-up**

Trainer check-ins and name submissions trigger real workflows.



Leader dashboard capture using development accounts.

05 / LEARNING WITH FEEDBACK

Native quizzes. Real review.

The assessment workflow lives inside the platform, with saved drafts, submission, results, retakes and administrative controls.

Skill Transfer quizzes.

Recruits take these quizzes inside the app. Set the answer key and passing score on a draft, then activate it — recruits always see the active version, and retired versions keep their records in the archive below.

Written answers to grade

Scoring only. The recruit stays at "Pending review" until you mark the answer.

Nothing waiting for review.

Money Wealth Life Insurance Quiz

[Original document](#)

VERSION 1

active

0 submitted attempts

PASSING SCORE (%)

80

INSTRUCTIONS SHOWN TO RECRUITS

Ten questions. Questions 1–9 are multiple choice and scored.

01 Two active quizzes

Money Wealth Life Insurance and The Power of Zero.

02 80% passing threshold

Server-side scoring for automatically graded questions.

03 Written-answer review

Administrative grading for the written response, with leader result summaries.

Quiz administration and review settings. Answer-key content is outside this view.

DRAFT AUTOSAVE

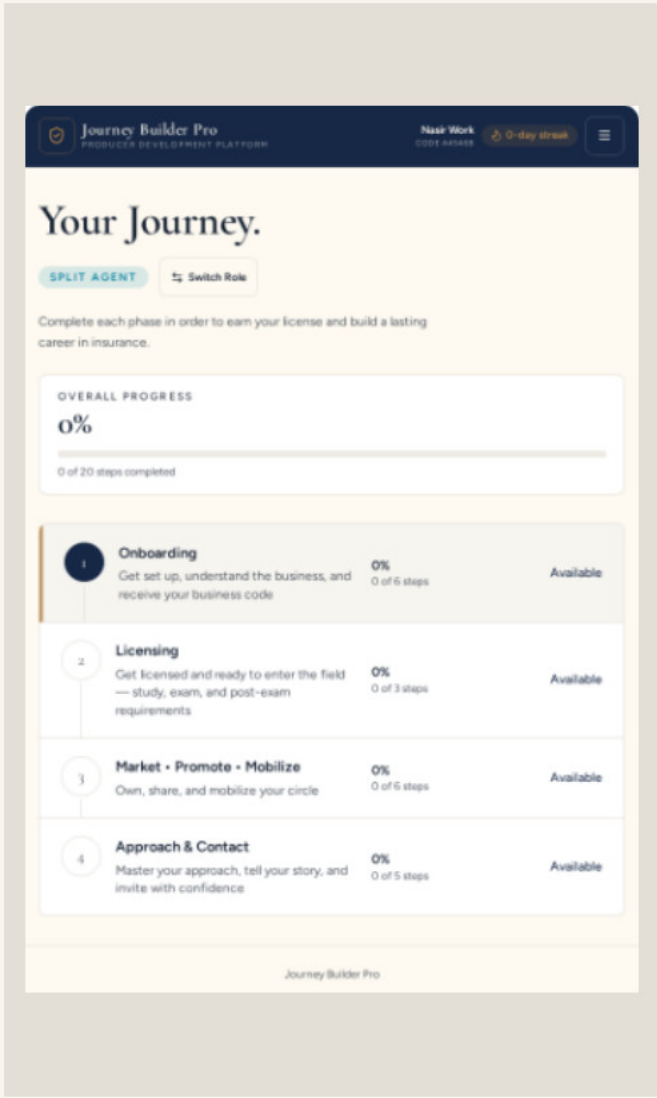
REVIEW + CONFIRM

RESULTS + RETAKES

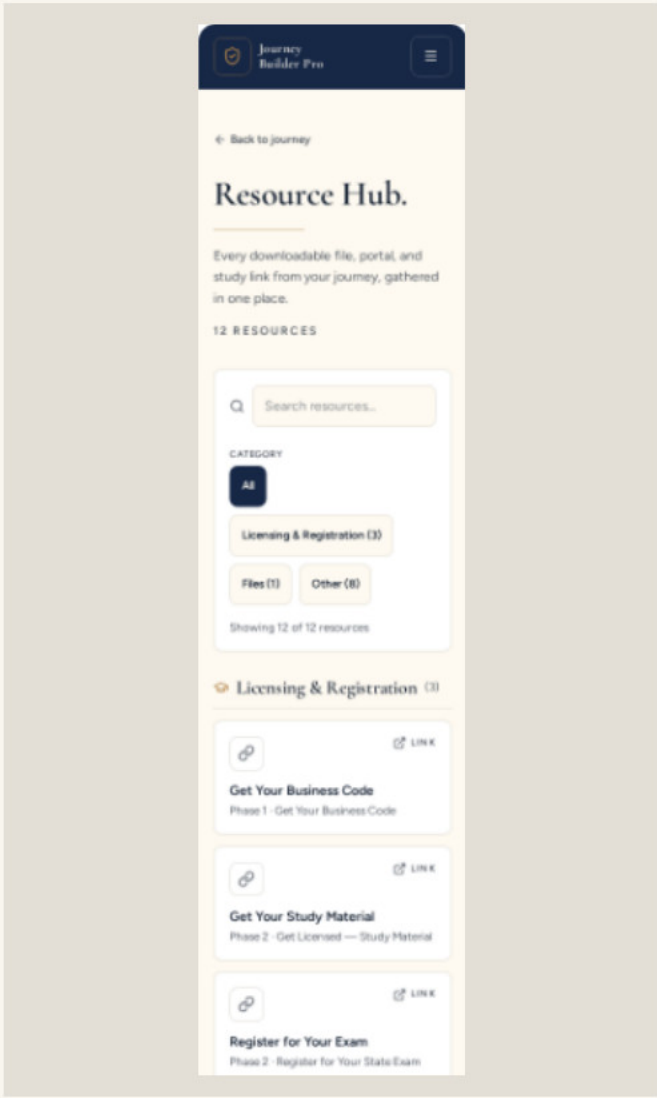
ADMIN CONTROLS

06 / BUILT FOR SMALLER SCREENS

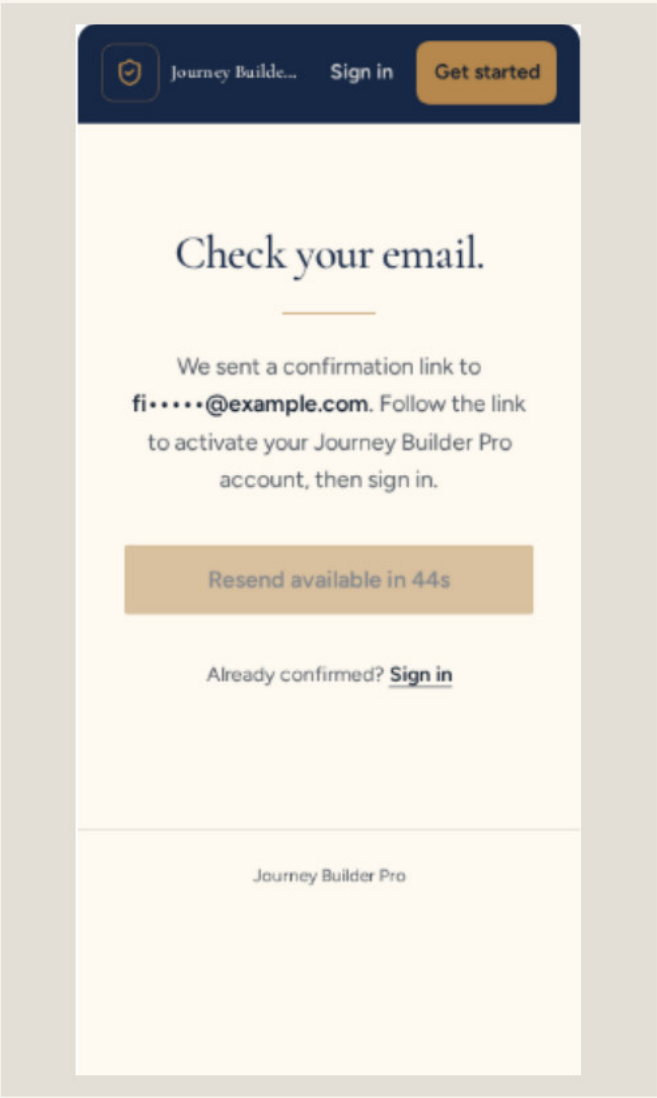
The same journey, wherever they learn.



Journey navigation



Searchable resources



Account verification

Usability in the details.

Mobile navigation restored.
Lesson layouts adapted.
Overflow and clipping resolved.

Shared typography, controls,
contact rows and dialogs keep
the experience consistent
across the platform.

07 / THE WORK BEHIND THE SCREENS

Reliable behavior. Stronger access controls.

We addressed the foundations that make the interface dependable: permissions, data protection, exam requirements and communication.

Access and content

Data permissions

Tighter user and team access rules.

Protected lessons

Restricted content checked on the server.

Private material

Narration and slide access secured.

Progress and persistence

Exam attempts

Recorded results and retake history.

Stable identifiers

Lesson behavior survives title changes.

Saved records

Stories, contacts and profiling retained.

Working communication

Account activation

Verification email and resend flow.

Leader updates

Step and phase notifications repaired.

Exam preparation

Recruit email with linked study books.

08 / CONTENT PRODUCTION

A human face for the training.



Frame from the produced Phase 3 introduction. A playable sample accompanies this portfolio.

Seven delivered videos

Client-supplied wording, selected presenters, varied looks and requested voice refinements.

- 01 Phase 3 introduction
- 02 Own, Join, Share
- 03 Potential Clients
- 04 Potential Business Partners
- 05 Immediate vs. Later Market
- 06 Key Financial Considerations
- 07 Relationship Profiling

09 / COMPLETE DELIVERY

Product design meets implementation.

An existing training platform improved across its interface, workflows, security and learning content.

Experience design

Landing page and product identity

Desktop and mobile navigation

Readable lesson and resource layouts

Shared forms, dialogs and status styles

Consistent contact-list presentation

Application development

Role-based training routes

Business Inventory and Story Builder

Leader dashboard and activity views

Exam requirements and native quizzes

Progress, streaks and aligned XP

Integration and delivery

Authentication and email verification

Leader and exam-preparation emails

Private content and access controls

Avatar video production and placement

Regression checks and inbox testing

React / TanStack Start / Tailwind CSS / Supabase / Lovable Cloud / Resend / HeyGen

EXPLORE THE PROJECT

path-pilot-demo.lovable.app

Training areas require an account.