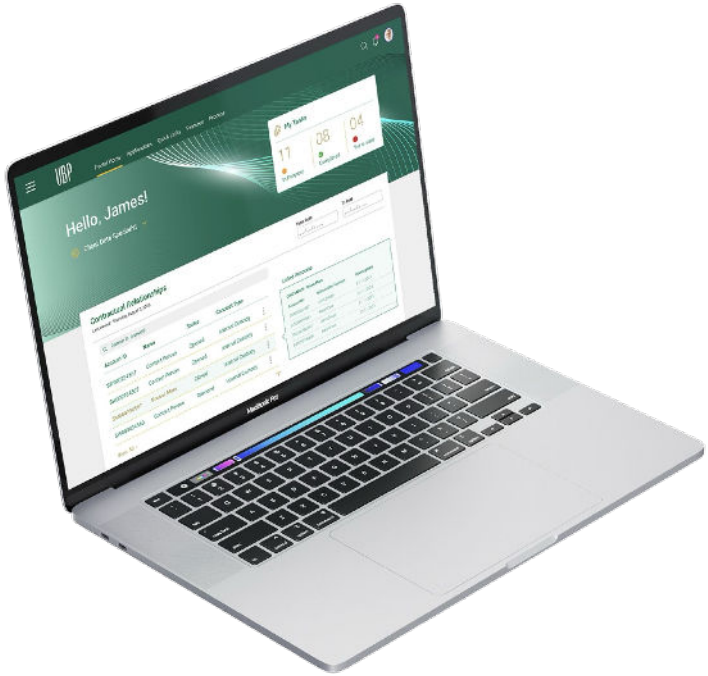
MVP for a private bank CRM

Project overview

The product:

A personalized dashboard providing access to widgets according to the user's role for bank employees.



Project duration:

3 months

Project overview

The problem:

The client needed to restructure its internal tools for all the company's different departments because each business line used a different web app.

The goal:

A product that would centralise all their needs, with customisation according to their business line.

Project overview

My role:

UX UI designer

On this project, we were a team of five designers. I participated in the creation of several screens (mainly IT Tax).

Responsibilities:

- Conduct users interviews
- Define personas, user journeys maps and user flows
- Rapid prototyping
- Visual design of low-fi and high-fi wireframes, prototypes

Understanding the user

- User research
- Users interview
- User journey maps
- User flows

User research: summary

To understand user frustration, needs, and requirements, I conducted user research through interviews and rapid prototyping for my project. My goal was to gain insights into the needs and wants of users so that I can better design the app .

User research: pain points

1

Pain point

Business processes that required collaboration between departments were extremely slow.

2

Pain point

Maintaining and evolving a fleet of multiple web applications was expensive and complex for the IT department to manage.

3

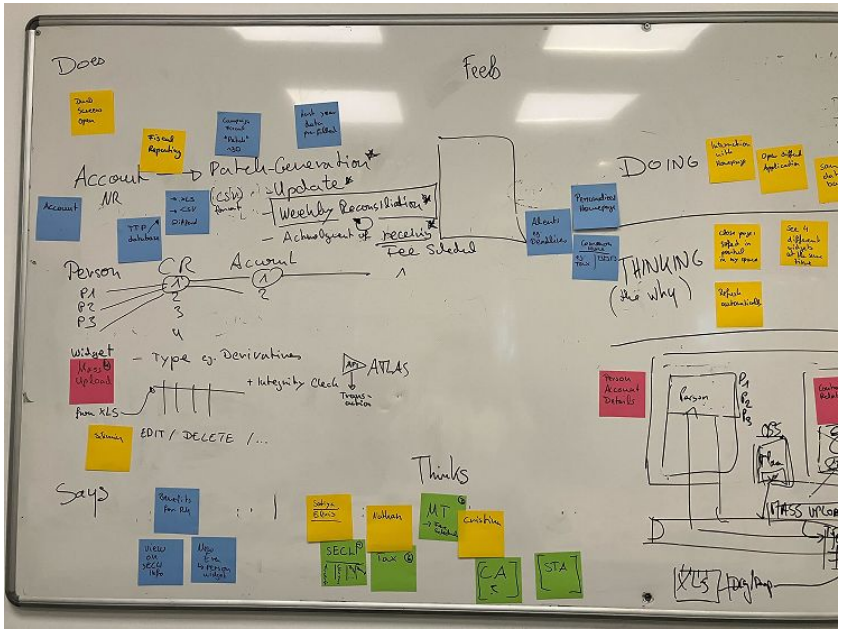
Pain point

The arrival of a new employee or internal mobility between departments required lengthy and specific training for each tool.

Users Interviews

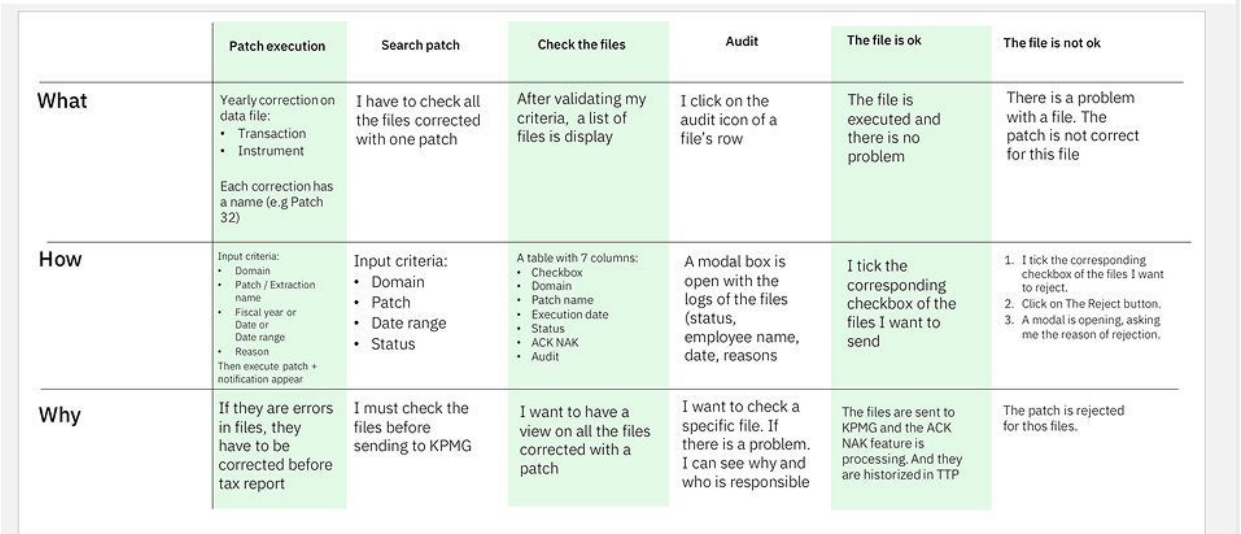
I started to understand the high-level goals, challenges, and success criteria for the project from the management's perspective.

- Conduct interviews with managers and stakeholders to capture essential requirements, business goals, and user expectations.
- Identify specific problems the tool should address, any existing pain points in current tools, and strategic objectives (e.g., improving efficiency, reducing error rates).



To-be Journey map

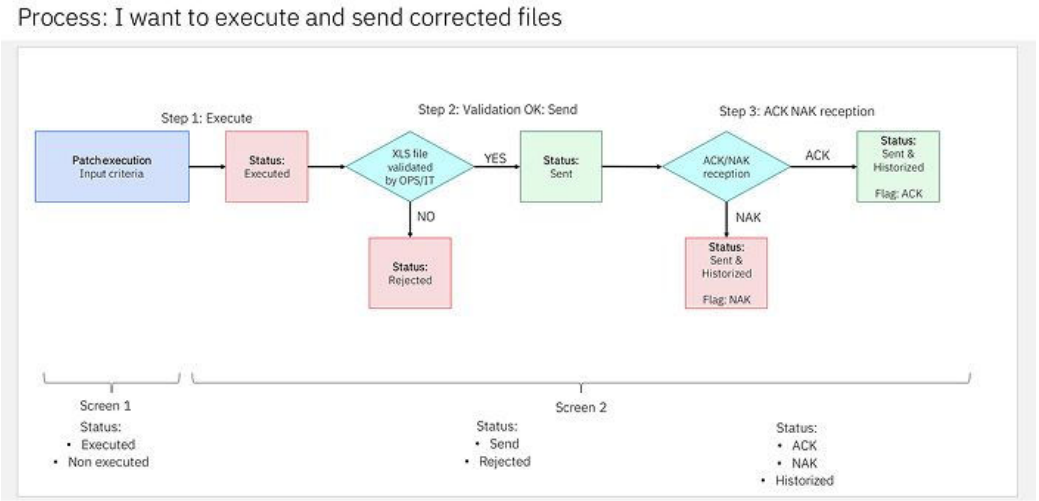
By creating to-be user journey maps, I wanted to design an ideal user journey that the tool will support to visualize how the tool can streamline their processes.



	Patch execution	Search patch	Check the files	Audit	The file is ok	The file is not ok
What	Yearly correction on data file: • Transaction • Instrument Each correction has a name (e.g Patch 32)	I have to check all the files corrected with one patch	After validating my criteria, a list of files is display	I click on the audit icon of a file's row	The file is executed and there is no problem	There is a problem with a file. The patch is not correct for this file
How	Input criteria: • Domain • Patch / Extraction name • Fiscal year or Date or Date range • Reason Then execute patch + notification appear	Input criteria: • Domain • Patch • Date range • Status	A table with 7 columns: • Checkbox • Domain • Patch name • Execution date • Status • ACK NAK • Audit	A modal box is open with the logs of the files (status, employee name, date, reasons	I tick the corresponding checkbox of the files I want to send	1. I tick the corresponding checkbox of the files I want to reject. 2. Click on The Reject button. 3. A modal is opening, asking me the reason of rejection.
Why	If they are errors in files, they have to be corrected before tax report	I must check the files before sending to KPMG	I want to have a view on all the files corrected with a patch	I want to check a specific file. If there is a problem. I can see why and who is responsible	The files are sent to KPMG and the ACK NAK feature is processing. And they are historized in TTP	The patch is rejected for thos files.

User Flow

At this stage, I wanted to visualize the user journey through the tool by mapping out eachstep users will take to complete key tasks, ensuring a seamless and logical flow.



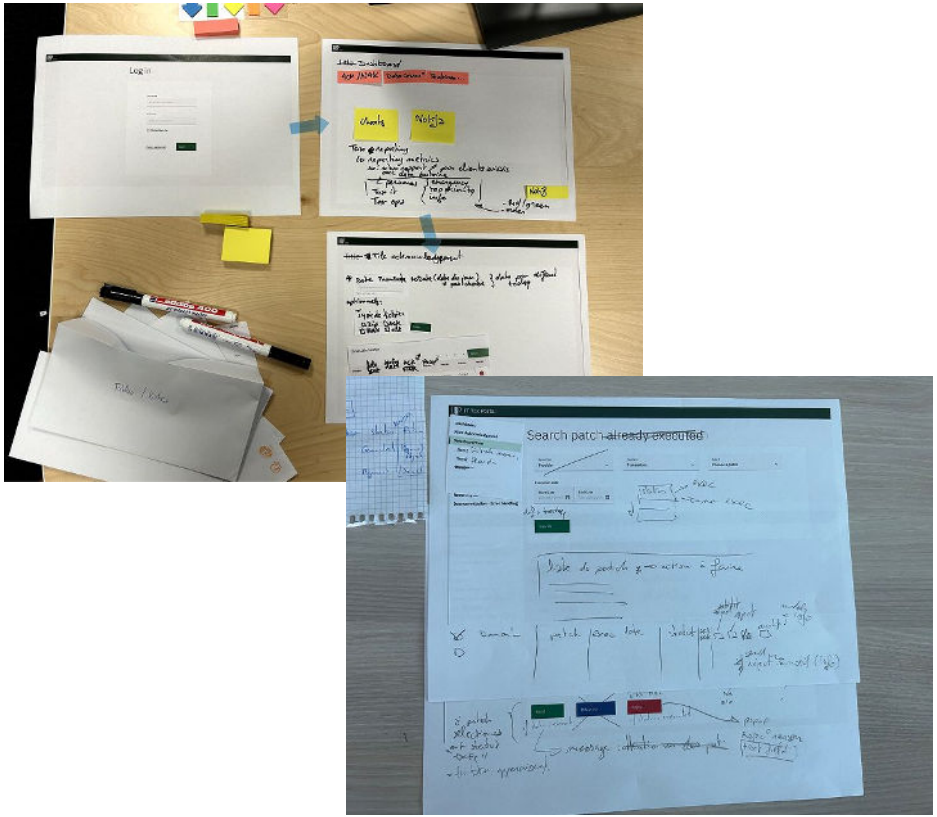
Starting the design

- Paper wireframes
- Low-fidelity prototype
- Usability studies

Paper wireframes

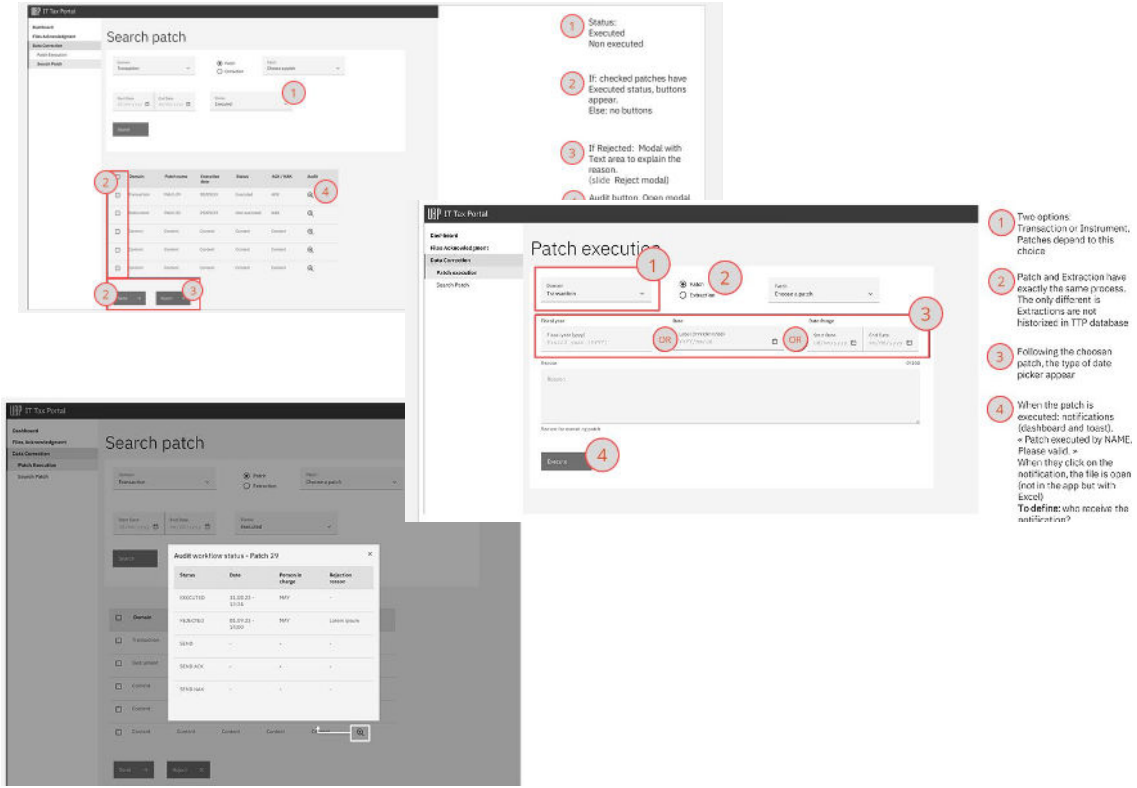
During a co-creation workshop with the users we built quick prototype to validate ideas with employees before committing to detailed designs.

- Create sketches or wireframes to represent key features and workflows identified in the journey map.
- Refine and prioritize the tool's core features, based on real-time employee feedback, to ensure alignment with user expectations.



Low-fidelity prototype

I created a low-fidelity prototype to test functionality before incorporating it into the final design to ensure all essential features and workflows are captured.



Usability study: findings

Now that I have the key insights from the usability study, let's look at the findings and define the actual problems that a designer can solve.

Finding 1

Search patch screen: The labels used for the filters or table columns do not exactly correspond to the jargon that users employ in their legacy application.
Detail missing: The MVP's vocabulary, although precise, was not sufficiently aligned with the common language of end users (a problem often identified in the discovery phase).

Finding 2

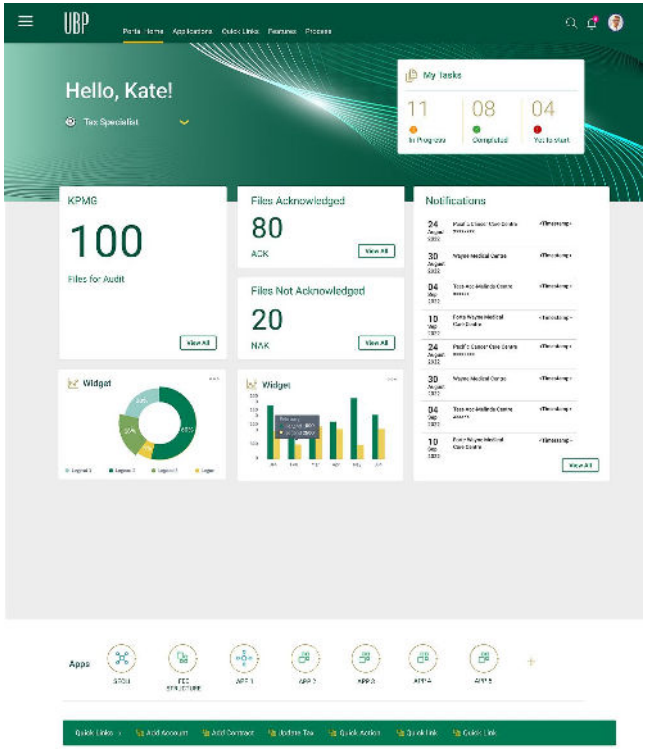
Patch execution screen: After clicking 'Execute', the user is not certain that the action has been registered because there is no visible success message, or the wait is too long.
Detail missing: Lack of clear visual feedback (success/error messages, loaders) which are critical in an environment where data validity is essential.

Refining the design

- High-fidelity prototype
- Accessibility

High-fidelity prototype

After finalizing the IT Tax section, I participated on creating the final designs of the main dashboard with IT Tax perspective with the goal of making them simple and intuitive. Carbon provides a robust technical and design foundation that can easily be extended and maintained over time, supporting the long-term evolution roadmap.



Accessibility considerations

1

When choosing a color palette, I made sure my primary colors met WCAG AA Compliance before building out the UI for each screen.

2

Accessibility of Data Tables: Correct use of semantic HTML tags (<th>, scope="col" or scope="row") to clearly associate data cells with their column and row headers.

3

I implemented a text hierarchy throughout the app. This helps users to distinguish the different sections and information on screen.

Going forward

- Takeaways

Takeaways

Impact:

Employees appreciated the new consolidated platform for several fundamental reasons: it directly addressed the pain points that existed prior to the redesign. The dashboard give them a unified and reliable customer view for the first time. There are high expectations that private banking management will quickly allocate the necessary budget for further development, in order to transform this promising MVP into a comprehensive and indispensable internal tool for the entire company.

What I learned:

As a UX UI designer working on a internal bank platform, I have gained valuable insights and knowledge through the design process. Some of the key things I have learned include:

- Understanding user needs
- Importance of simplicity
- Accessibility considerations
- User feedback

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