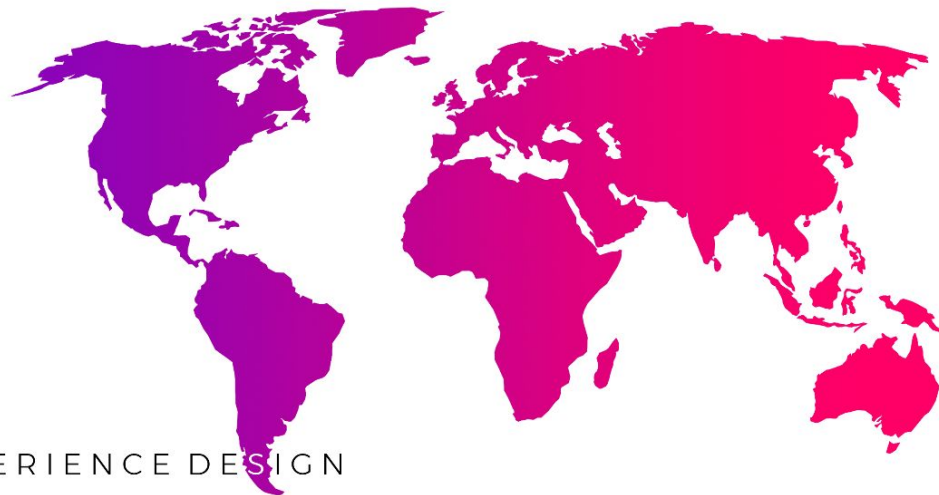




USER EXPERIENCE DESIGN

DESIGN CASE STUDY - CXO DASHBOARD

ABHISHEK RAMESH CHAVAN

FINTECH

A FINANCIAL TECHNOLOGY SERVICE PROJECT



PRODUCT VISION



Create an intuitive and data driven Dashboard, which helps user take informed decisions for Business, Product and Customers.

OBJECTIVES

Help users make key decisions that are based on day to day data

Help user take the right decisions

Give an overview of the stats related to banking

Give a high level understanding of Revenue, Customers and Products

Access to data in a quick and intuitive manner

KEY WORDS

Business driven insights

Suggestive data with drill downs

Insight about customers

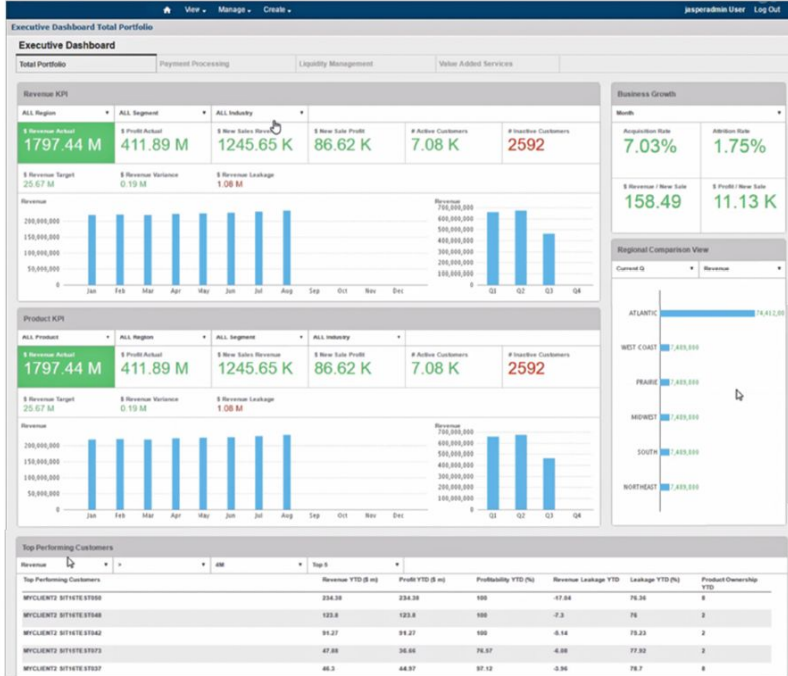
Product performance and trends

Data prioritizing

Region-wise break up

UI that generates interest

SITE ANALYSIS - EXISTING DASHBOARD



Existing Dashboard was analysed in terms of Navigation, Hierarchy of data, Grouping of information, Trends, Simplicity and ease of access.

Overall perception of the existing product

Data Hierarchy needs to be redefined

Confusing Navigation style - behaves as a filter

User centric approach is missing

Overload of information to the user - No prioritization of data with prime importance

Some ways through which experience can be made more intuitive and easy to consume for the User

Display relevant priority data for better decision making

Effective graphical representation for easy understanding

Real time data

Customizable widgets

Dashboard drilldowns

Importance to Information Hierarchy than Visuals

Notification mechanism

PERSONA MAPPING

Persona Mapping was carried out to clearly define the pain points, user faced while using the dashboard. Understanding the needs and users' activities on daily basis, better solutions can be provided.



L.O.B Head

Name	James Foster
Designation	L.O.B head
Age	50 - 60 yrs.
Demography	United States
Characteristics	To the point, analytical, good listener, rational
Tags	Process Improvement, L&A, Business process, project management, Business analysis, pricing

Motivations

- Increase in revenue
- Success
- Path breaking initiatives
- Sense of authority/ownership

Pain Points

- Informed decision making
- Scattered data
- Reading heavy data analysis
- Time crunch
- Unavailability of data



R.M Lead

Name	Oliver Walter
Designation	R.M Lead
Age	40 - 50 yrs
Demography	United States
Characteristics	Polite, Assertive, Good negotiator, Effective communicator, Leader
Tags	Customer service, Crisis handling, RM performance, Revenue Targets, Product Targets

Motivations

- To Outperform
- Customer Loyalty
- Appreciations from higher authorities
- Building good team

Pain Points

- Lot of paper work
- Regular follow up with RM's
- Lack of dynamic data
- Trust issues with RM's

Key Decisions

- Discount & Pricing
- Evaluating RM Performance
- Escalating product performance to L.O.B Head

Needs & Goals

- Train RM's
- Real time updates
- Quick look ups
- RM Team collaboration
- Achieve targets

Tasks

- Handling RM's
- Maintain data records
- Customer escalations
- Resolving customer

Activate Windows
Go to Settings to activate Windows.

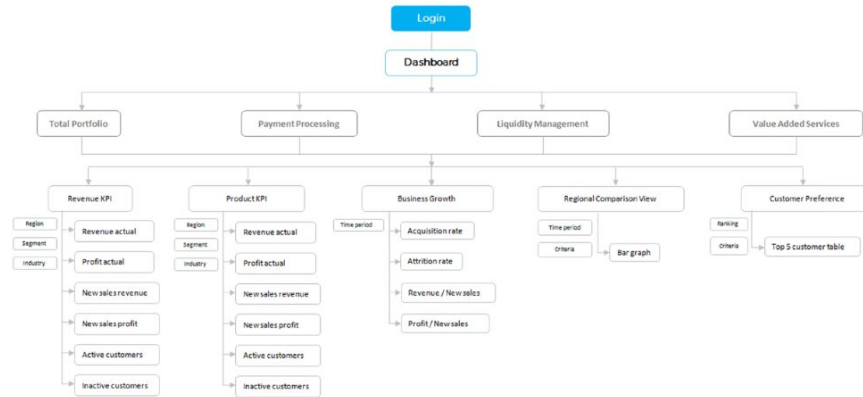
USER JOURNEY



Considering the persona of Line of Business Head, the User journey was mapped. This journey provided a base for the tasks carried out by the user, right from Login until logout.

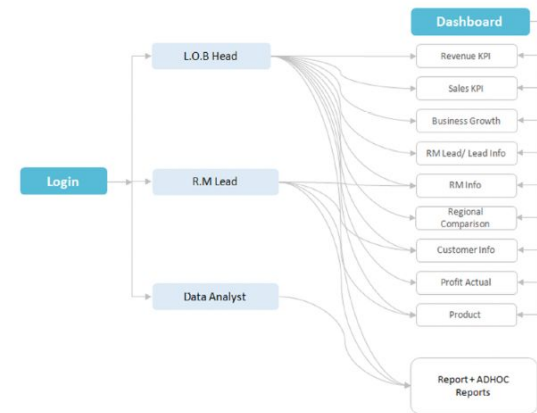
INFORMATION ARCHITECTURE - EXISTING

Existing Information Architecture needed restructuring as there were many flaws such as - Repetative filters, Navigation was not intuitive, Nesting of content are few of the many from the exhaustive list.



PROPOSED I.A - ROLE BASED

The proposed I.A was Role based. This removed unnecessary clutter of information, Easy navigation, No nesting of content and the entire experience was simple and intuitive.



DESIGN DIRECTIONS



TREND SPOTTING

Trends are observed and accepted widely and these trends make your platform a mark higher and hence make you stand out in the competition.



VALUE PROPOSITIONS



COMPARISON FEATURE

Get all insights by comparing two graphs based on different criteria like REVENUE, PRODUCT, REGION etc.



QUICK DRILLDOWNS

View quick drill downs of all important data to reach the core of the update



WIDGETS

Customizing the most important data intake of the day is the best way to monitor what you want

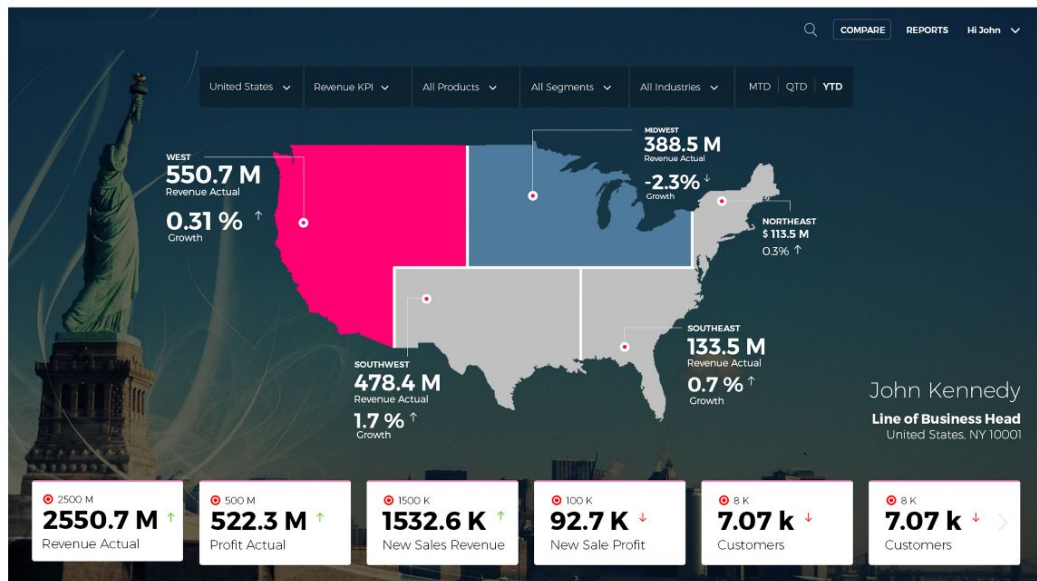
DESIGN TRANSFORMATION

OLD DESIGN



NEW DESIGN

DESIGN DELIVERED



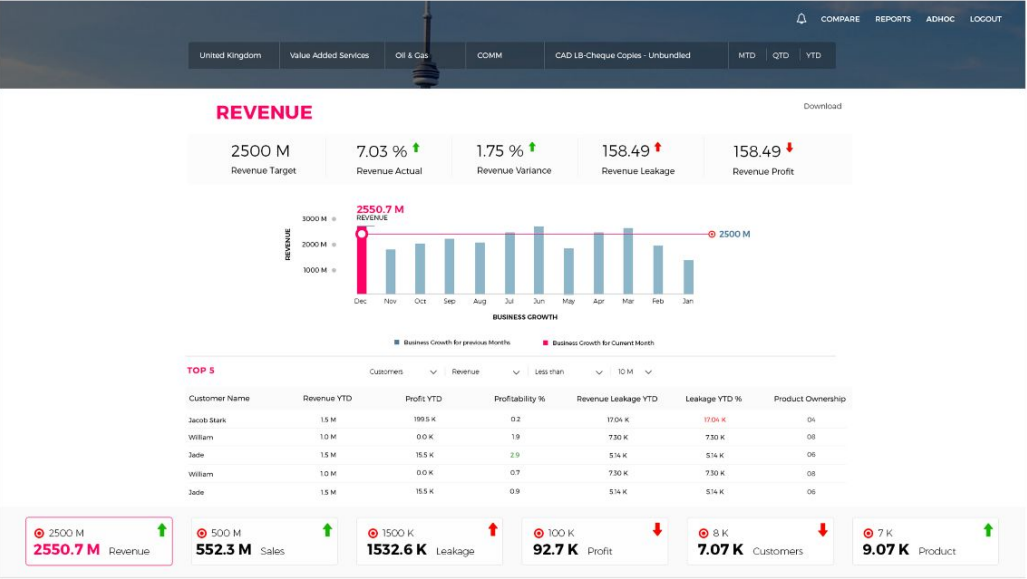
LANDING PAGE

A radical approach to the conventional dashboards we often get to view. During research, it was found that, **Region Revenue stats** was the primary focus for the CEO/ CIO. So, **Region** was kept as the focal point for the entire UX workflow.

While working on building better experience for the product, I had envisaged the look and feel in back of my mind, which motivated me to carry out the task of Visual Design along with User Experience.

The product was enhanced with many value propositions like the cards which showed secondary information on hover, Single navigation/ filter approach and Map navigation to drill down further to state level information.

DESIGN DELIVERED



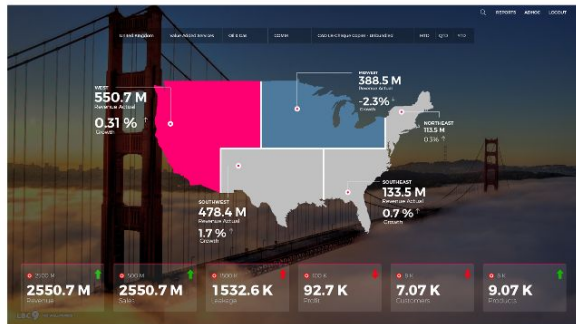
DRILLDOWN PAGE

A quick drill down was provided when clicked on the cards in Dashboard. This drill down lets the user dive in to much detailed statistics which assists to analyze and take better decisions.

While being in the drill down page, the user can still toggle between the cards at the footer to navigate to different categories - Revenue, Profit, Sales and so on.

A graph shows detailed report, ranging over period of months and years with specific target. The single navigation and image is kept fixed in order to maintain consistency in design

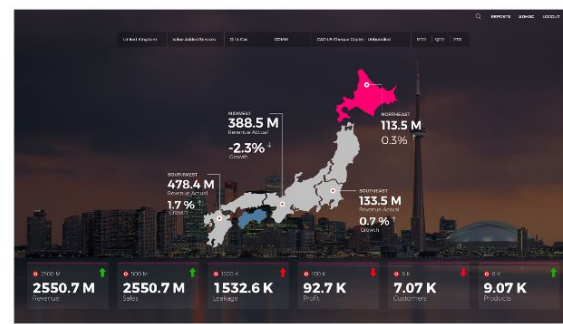
VISUAL REPRESENTATION



UNITED STATES OF AMERICA



CANADA

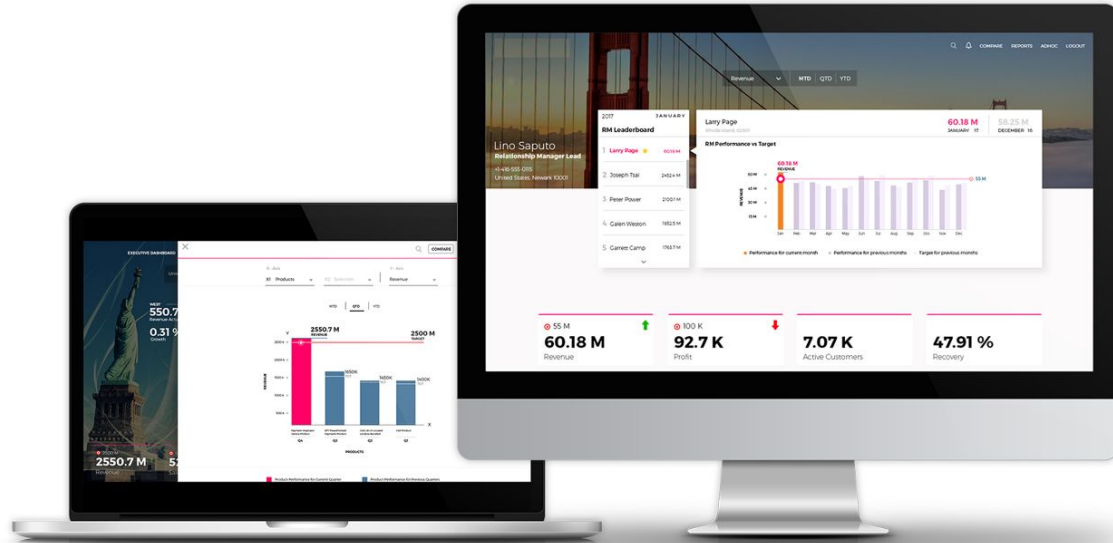


JAPAN

Consistent Visual design screens with region wise display of information in maps and image of specific region which rendered rich experience and high scalability of the product.

DESIGN DELIVERED

CIO Dashboard



An Executive level individual per se CIO or CFO will need to see very specific information on his dashboard.
This concept outbreaks the conventional dashboards to visualize information.

THANK YOU