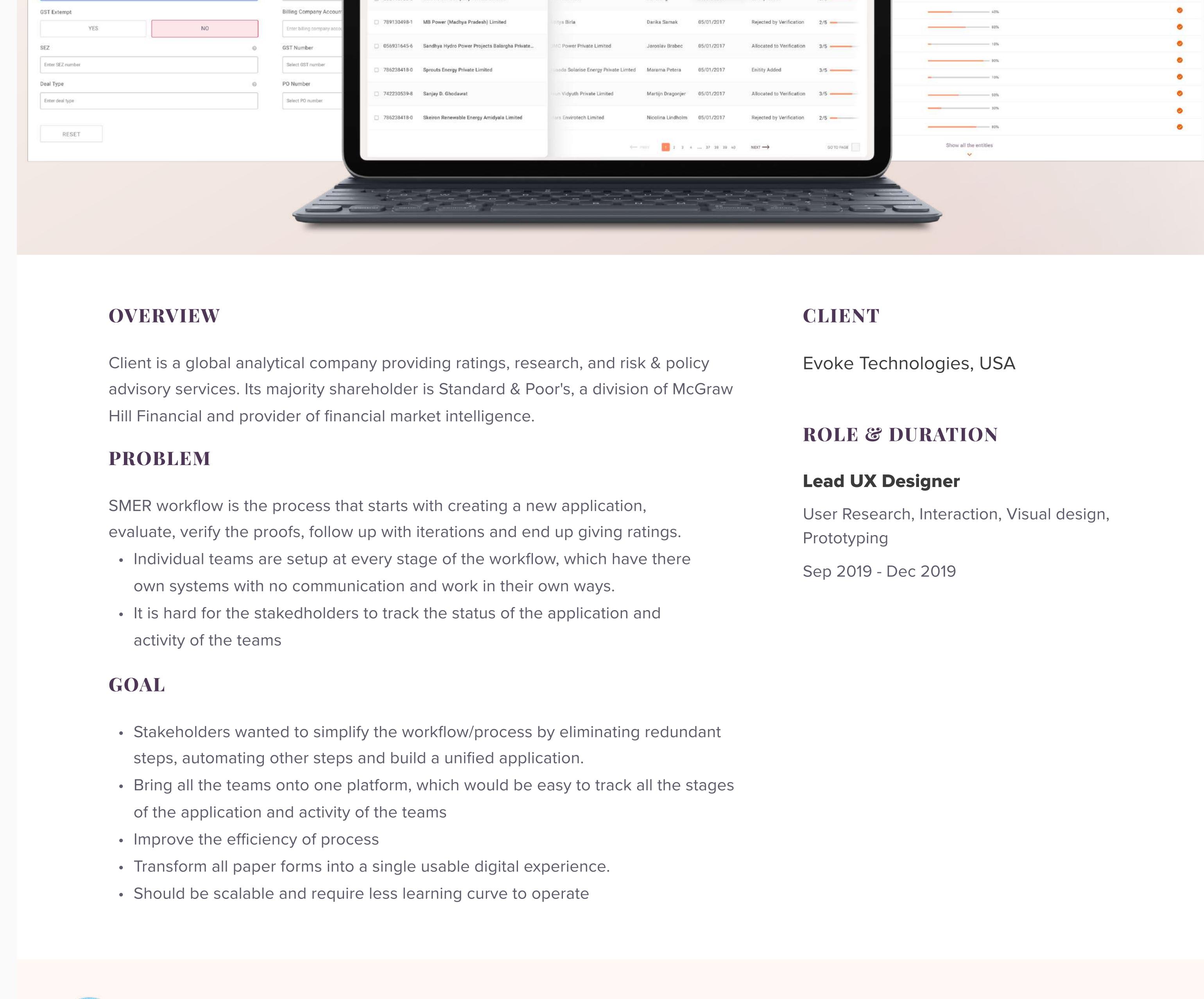


## SMER WORKFLOW

(in adherence to NDA, client name & logo are replaced)



### OVERVIEW

Client is a global analytical company providing ratings, research, and risk & policy advisory services. Its majority shareholder is Standard & Poor's, a division of McGraw Hill Financial and provider of financial market intelligence.

### PROBLEM

- SMER workflow is the process that starts with creating a new application, evaluate, verify the proofs, follow up with iterations and end up giving ratings.
- Individual teams are setup at every stage of the workflow, which have there own systems with no communication and work in their own ways.
  - It is hard for the stakeholders to track the status of the application and activity of the teams

### GOAL

- Stakeholders wanted to simplify the workflow/process by eliminating redundant steps, automating other steps and build a unified application.
- Bring all the teams onto one platform, which would be easy to track all the stages of the application and activity of the teams
- Improve the efficiency of process
- Transform all paper forms into a single usable digital experience.
- Should be scalable and require less learning curve to operate

### CLIENT

Evoke Technologies, USA

### ROLE & DURATION

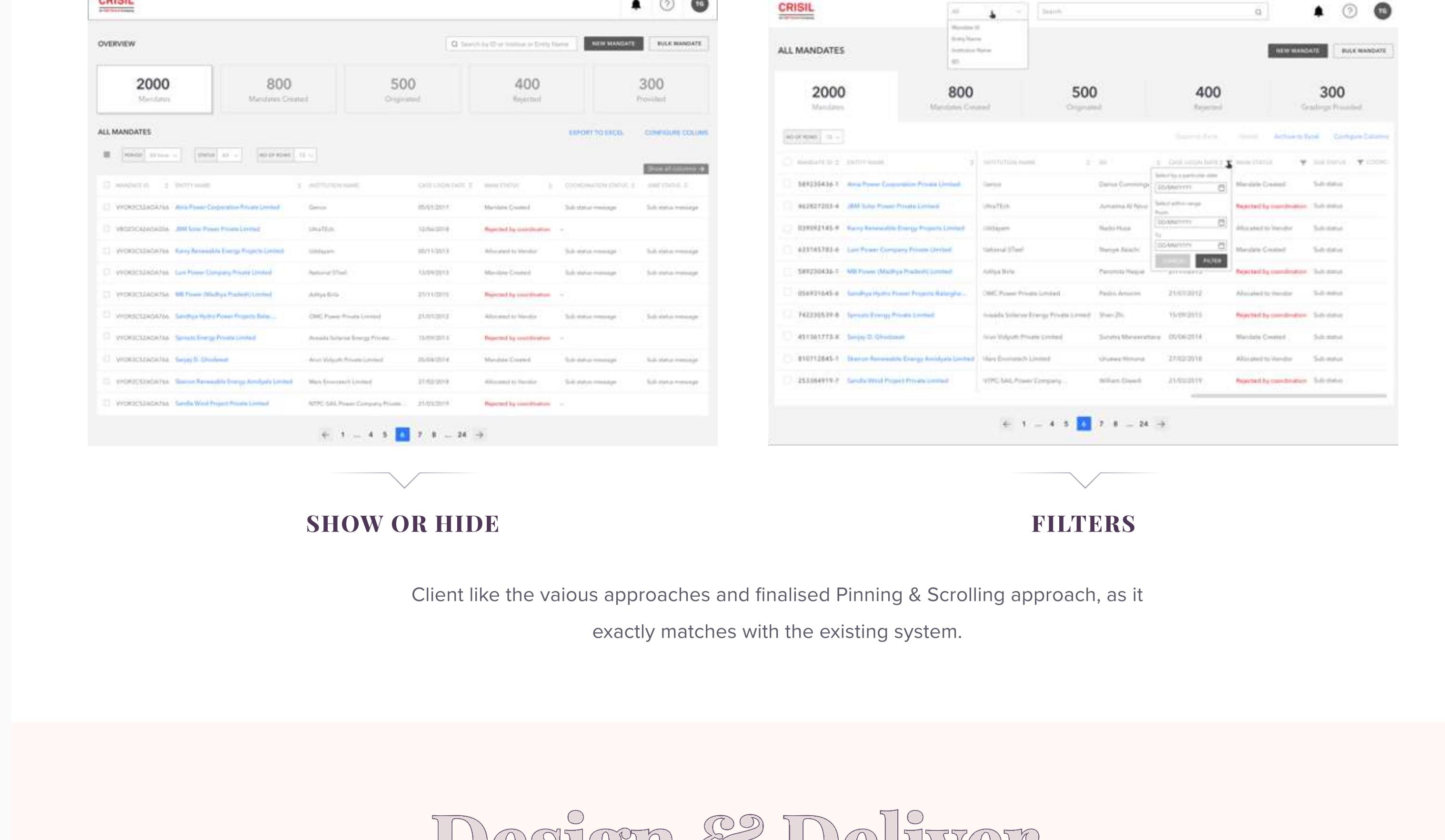
#### Lead UX Designer

User Research, Interaction, Visual design, Prototyping

Sep 2019 - Dec 2019



## Empathise & Define



Used **Double Diamond** (discover, define, design and deliver) process to analyze the requirements, identify the users/roles, discover insights, define the flows and design intuitive interfaces that assist in completing the task with ease. Conducted **stakeholder interviews** (for an entire day) collaboratively with project manager and technical resources which helped everyone understand the different stages of the process and different roles involved

- Through stakeholder interviews able to get more insights, business goals, user personas, technical constraints, and usability problems with the existing process
- Whiteboarding sessions (Client fell in love with these sessions) able to identify red routes of the system, which in return helped to create the as journey maps and task flows
- The wireframing prototyping helped to match identify red model of the stakeholders.

### INSIGHTS

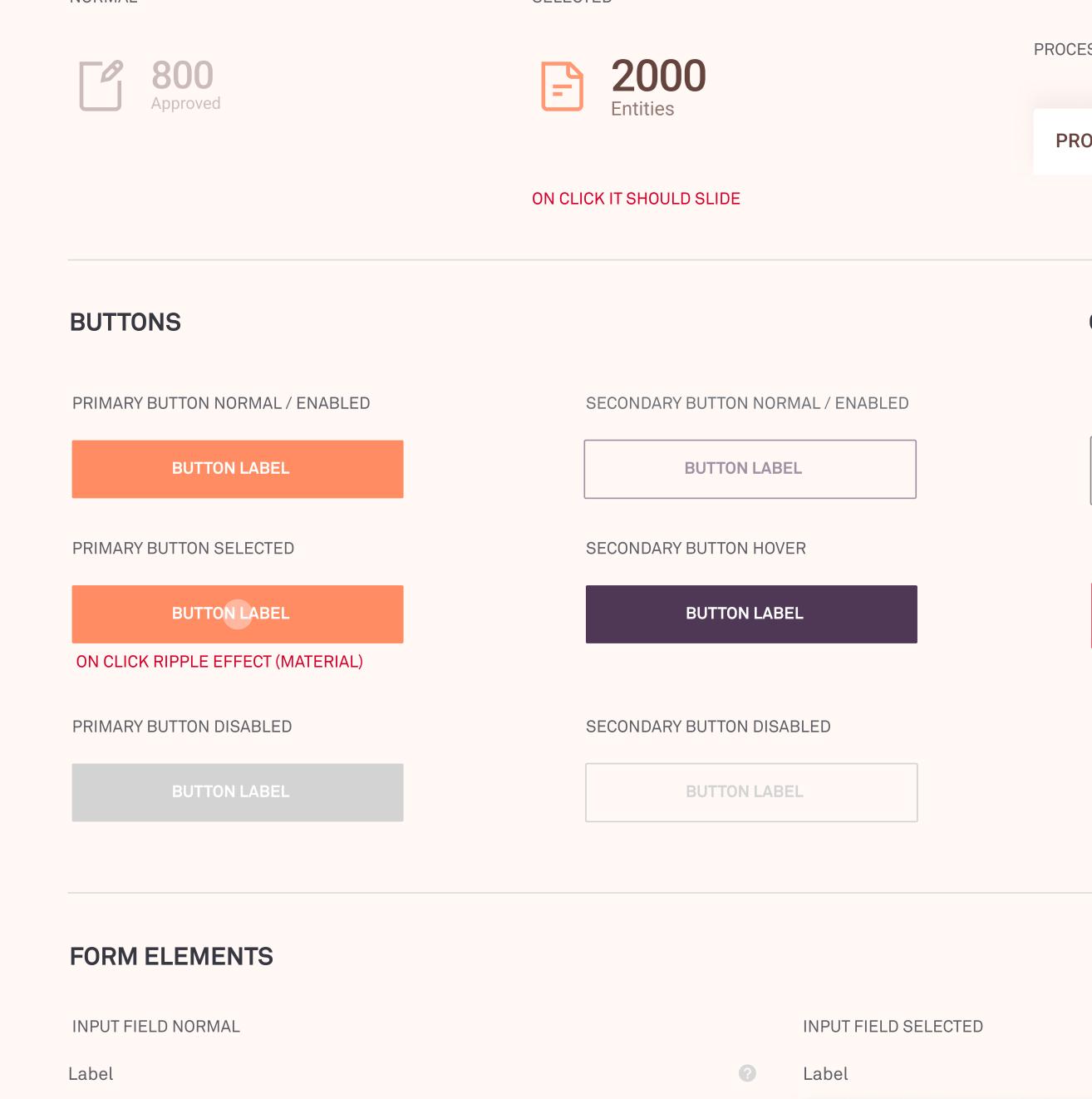


## Ideate, Prototype & Iterate.

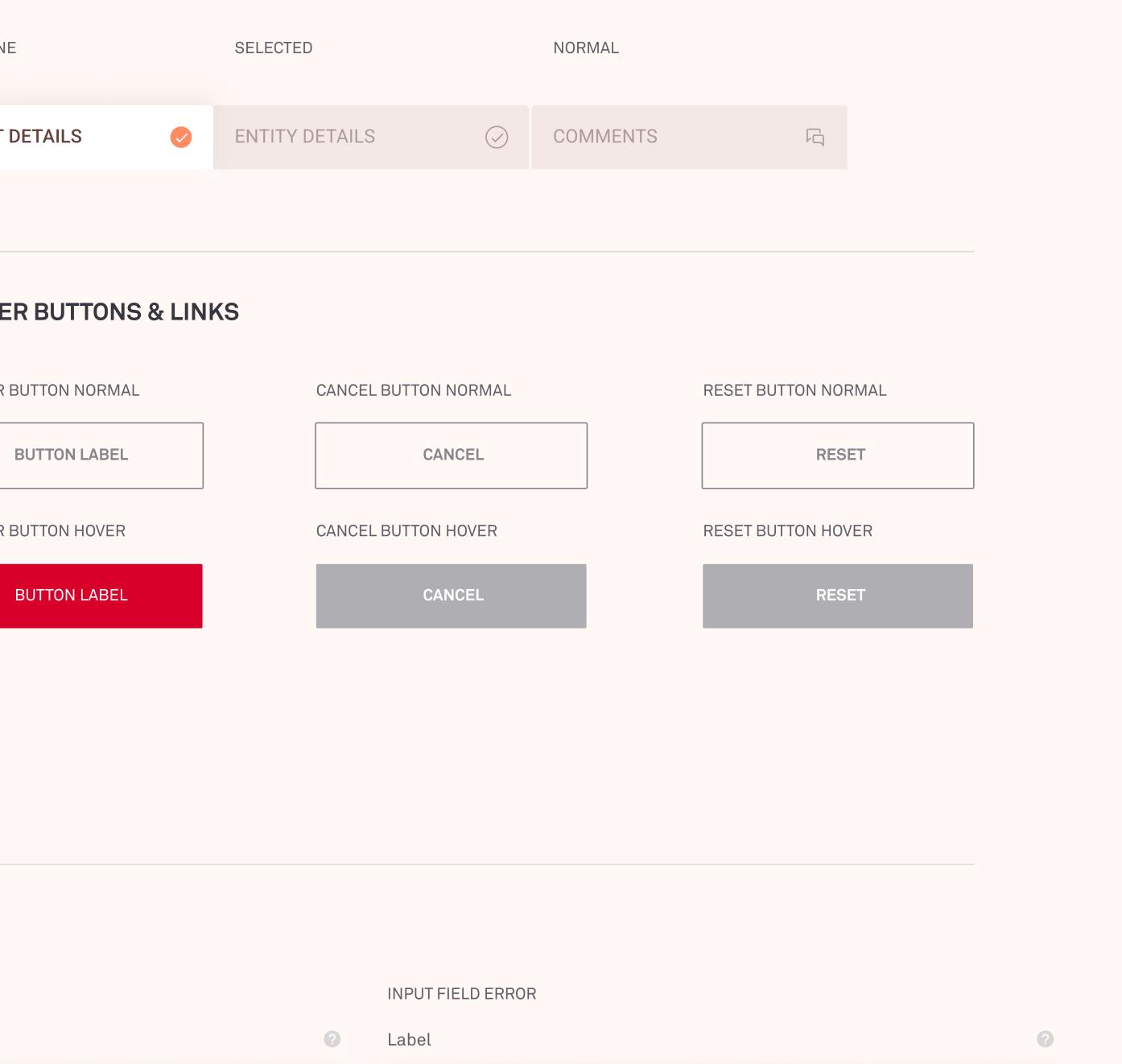
Based on the insights discovered during the brainstorming session, designed and presented different approaches of viewing and navigating the data grids, applying filters and find the exact data.



### PINNING & SCROLLING



### EXPAND & COLLAPSE



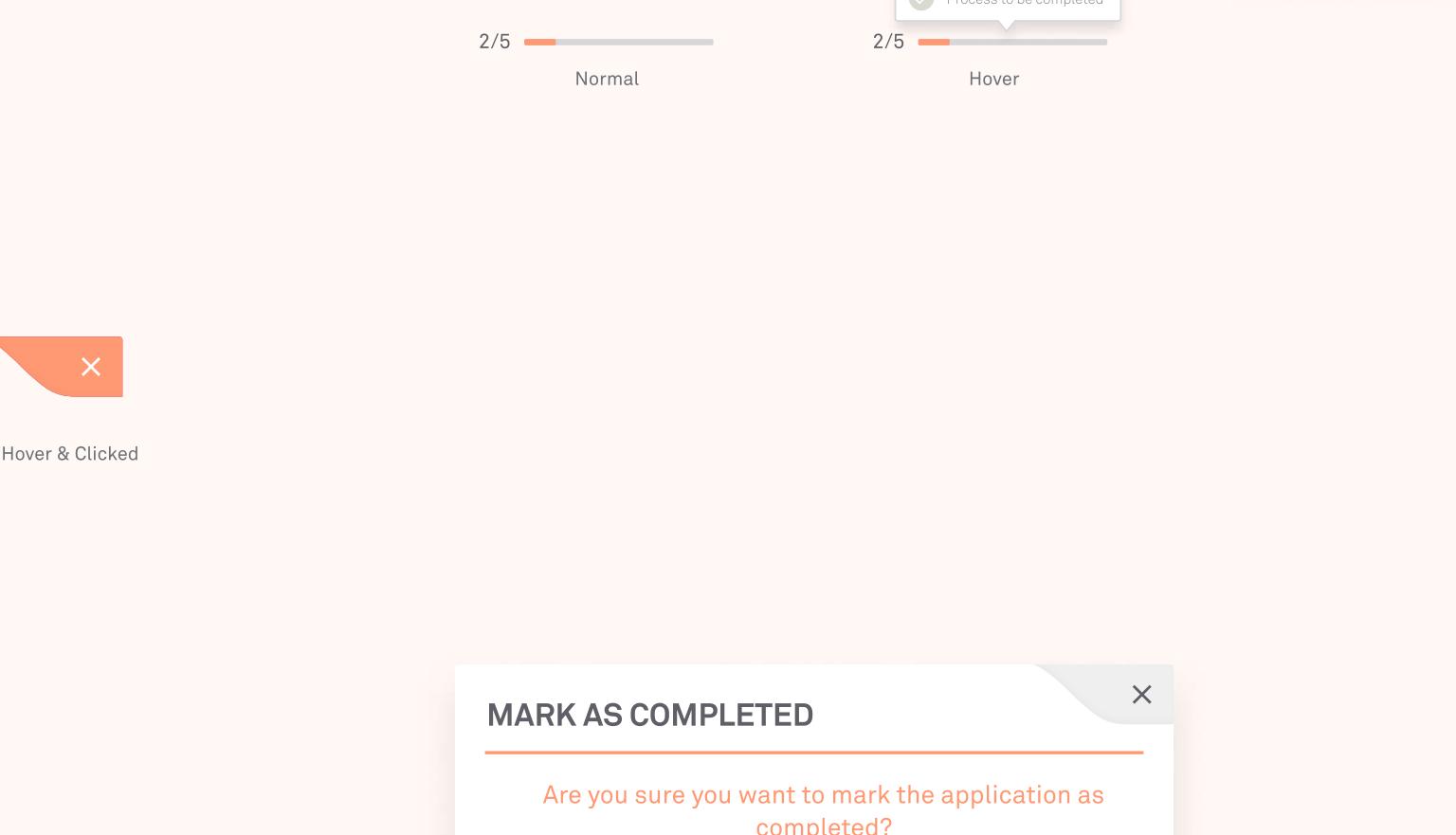
### SHOW OR HIDE

Client like the various approaches and finalised Pinning & Scrolling approach, as it exactly matches with the existing system.

### Landing Screen

Designed the screens keeping in mind that the design should look modern and minimal. Did some visual enhancements when migrated from wiframe to design. Apart from the data, the appearance remains consistent for every role.

## Design & Deliver.



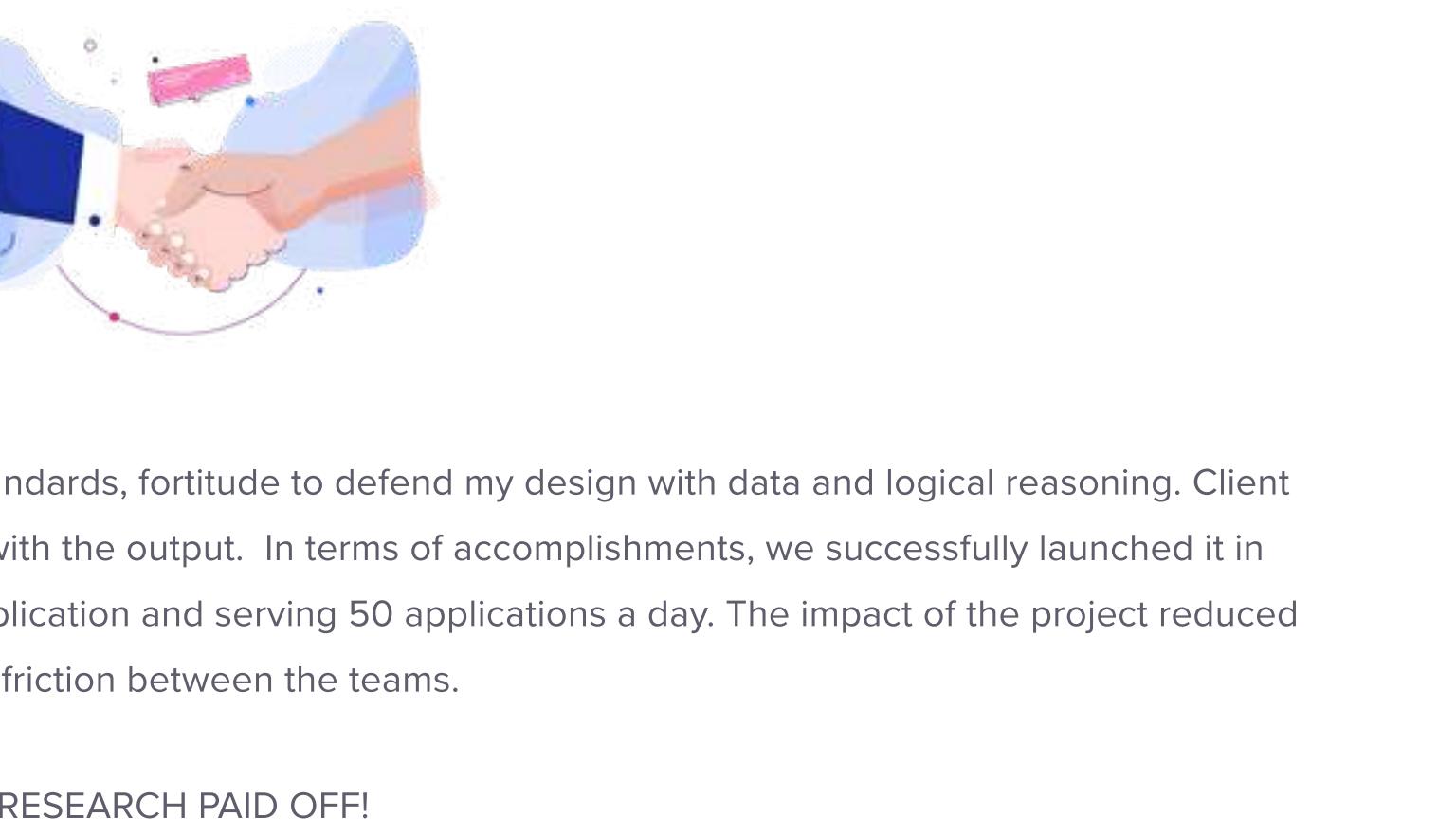
### Bulk Upload & Notifications

Instead of creating single application at a time, user can upload or create multiple applications offline and upload it into the system. It verifies and creates application which have the right data and display errors which does not and informs the user to fix and re upload the file. This feature helped reducing the redundancy and the best part is knowing the errors and fixing it easily

### Forms

The more effort is needed to fill out a form, the less likely users will complete the form. So took shorter is better approach - by eliminating all inessential fields. Avoided dropdown menus, used place holders and masked input, clear and concise labels, grouping related fields together, chunking.

### RESEARCH & GROWTH



In the whole process, I developed an app super quick, set the standards, put it to test, to get the accomplishment, we successfully launched it in November 2017. Now more than 50 users are using this application and serving 50 applications a day. The impact of the project reduced

loss of friction between the teams.

RESEARCH PAID OFF!

Feedback

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