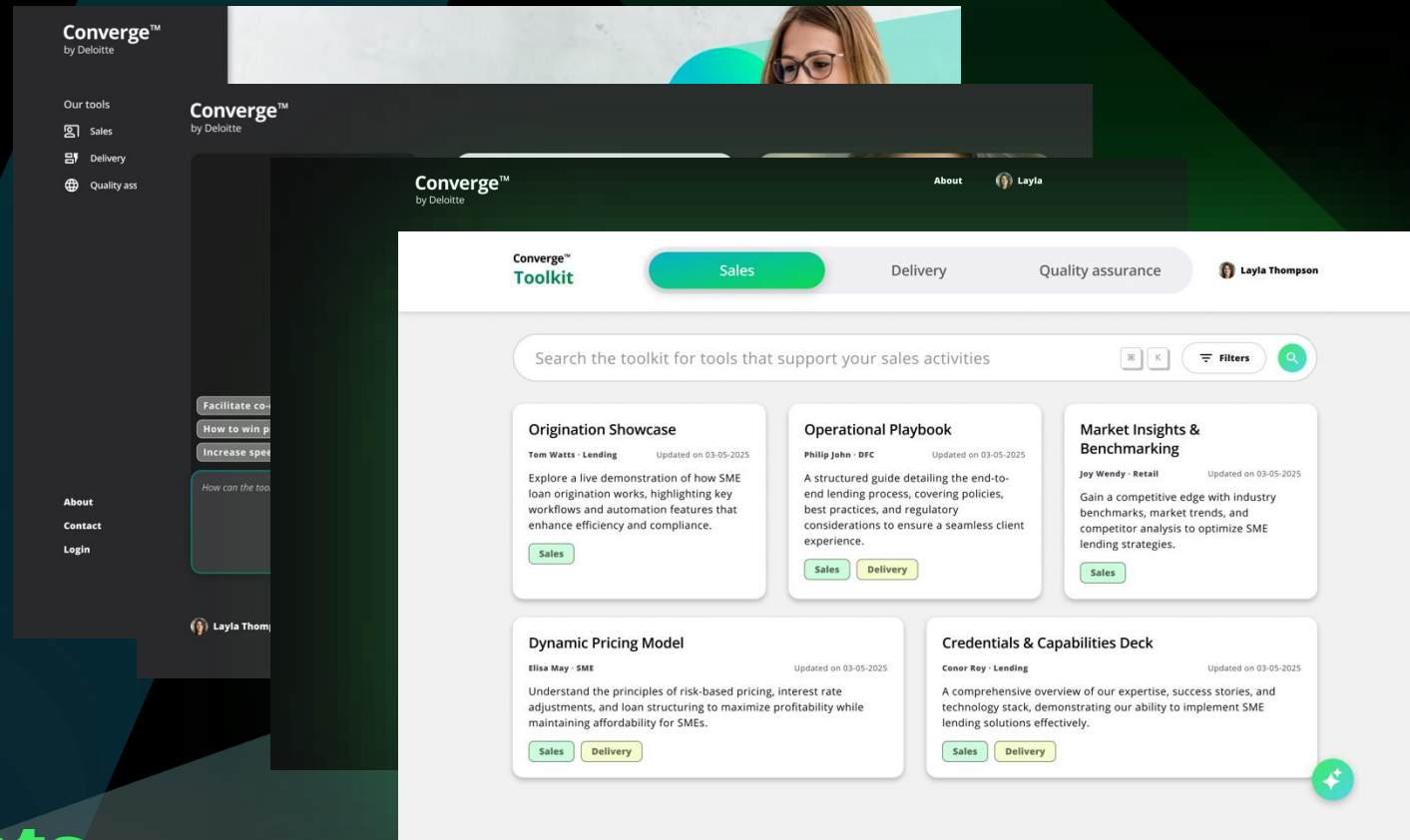
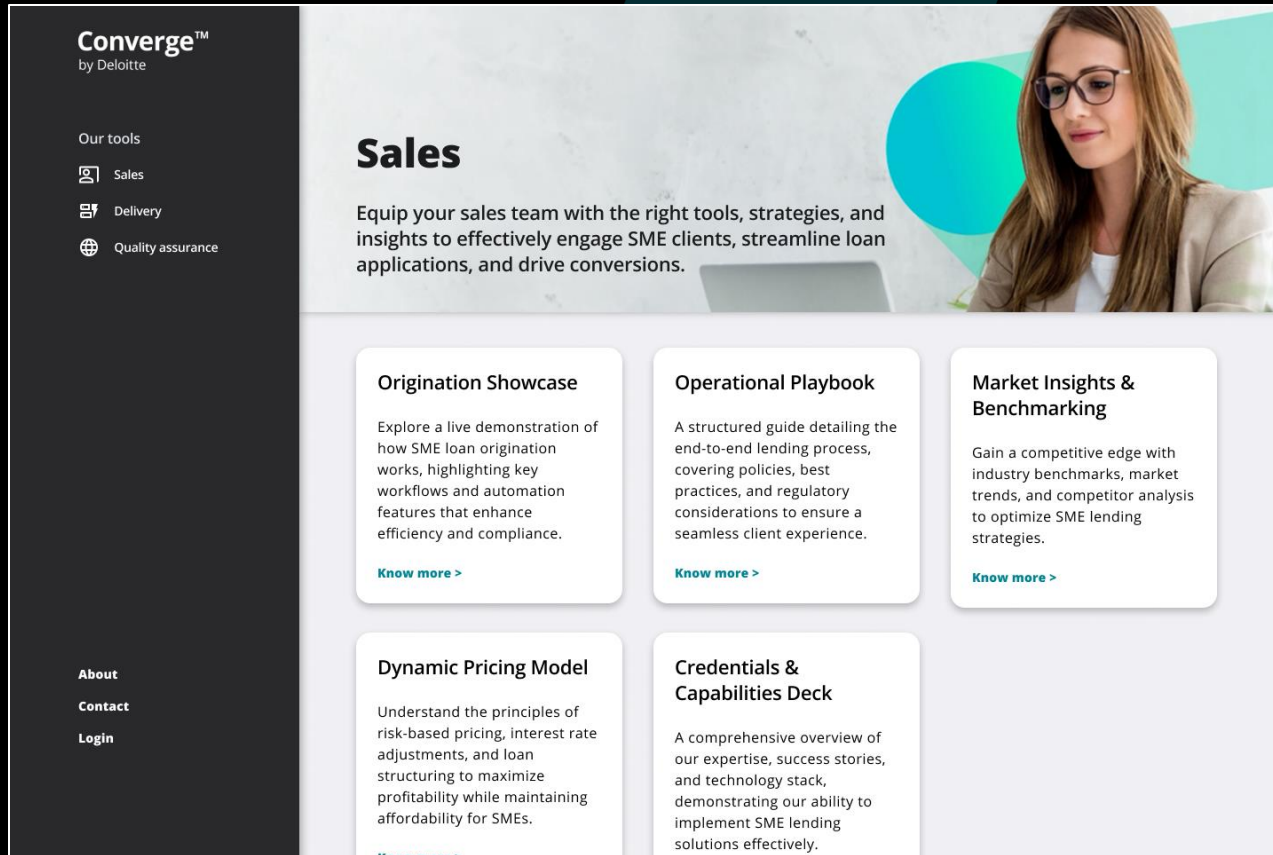


Design Concepts

Progress on concept testing





Concept #1

Summary of insights

The delivery-focused content could be streamlined with a condensed, easy-to-scroll list. Developer and sales documentation should be kept separate, as developers prefer not to navigate sales-related content. The platform is designed for users who know what they're looking for, so a **search bar** is essential. Content structure should be clearly defined for developers. Buttons should take users **directly to their destination** without unnecessary steps. Additionally, each content block should have a **designated owner or contact person** for clarity and accountability.

Detailed insights

Developer

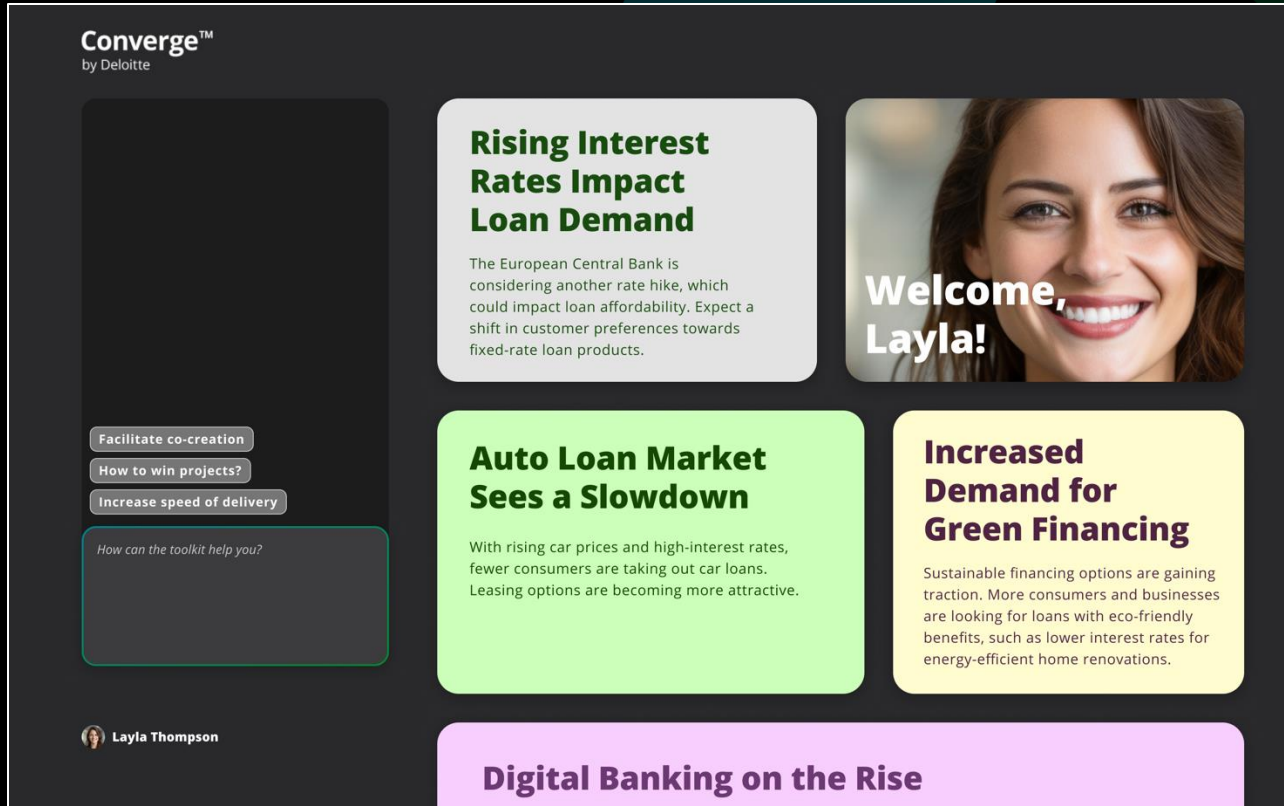
- Developers would go **straight to delivery** since they probably know what to look for and would expect it to function like developer docs
- Since skimming is the norm, **a list format** might be better than tiles
- Developer and sales content should be **separate and perhaps also have a different experience**
- A **search bar** would be used frequently potentially supported by **keyboard shortcuts**
- It should be possible to **easily copy code**
- The **owner of each content item should be visible** both to ensure credibility of the source and to gain access

Product Manager

- There are tiles that might fall into multiple categories
- Main buttons on this page for the themes and clicking on the themes shows them in/as the sidebar
- Buttons should take me to **where I want to go immediately**
- **Collapsed text for tiles**
- Want to know **who is the point of contact**

Sales

- Skimming can be **supported by visual elements**
- Some content can fall under **multiple categories**. This should be accounted for
- The interface can also be structured by topic E.g., Point of views, architecture etc
- It should be possible to break down themes into sub-categories using **filters**
- There should be a **browser preview** for files



Concept #2

Summary of insights

Finding information should be **quick and easy**, without unnecessary barriers like chat. **Skimming** should be facilitated, and important content **shouldn't be hidden behind tiles** where it might be overlooked. Users typically go **straight to documentation**, and long pages should include **header links** for better navigation.

Gen AI should be used for **summarization**, not as a primary navigation tool or search replacement. Users prefer **direct access** to known information rather than prompting AI. However, prompting can be useful when something isn't found. The platform should support both structured searches for firm members looking for something specific and exploratory browsing for new users or those wanting to learn more about Converge.

Detailed insights

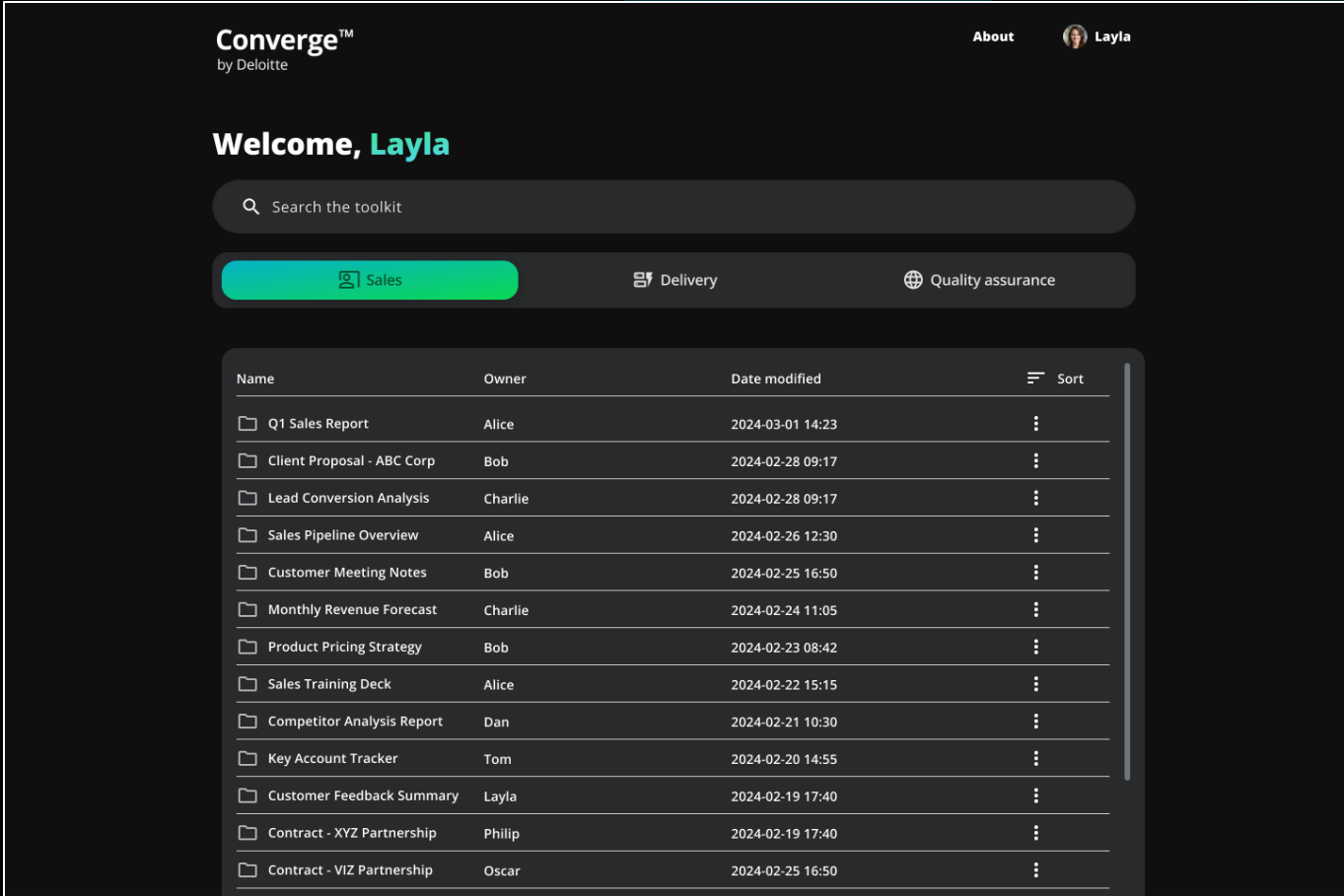
A look into what was actually said

Developer

- **Chat is a barrier** in finding information
- Non logged in state is interesting
- **Ease of finding stuff** is important
- **Skimming** needs to be facilitated
- If it is **hidden behind a tile**, I probably would miss it
- I usually go **straight to documentation**
- If it is a long page, **I want header links**
- I would only use Gen AI to summarize not as navigation or to find something specific. **If I don't find something, then I can prompt**
- **Supports exploration**
- I don't want to write a prompt when I'm looking for something I know about
- **New user** or someone who just wants to know more about Converge **could benefit from exploration**
- For **people within the firm**, they would be looking for **something specific**. That is less exploratory

Sales

- If there is a requirement to login, there should be a **clear benefit**
- I want to know who to reach out to if I can't find something
- The **usage data should improve toolkit usage**
- If it does work, it does **align with our cutting edge ambitions**. Conversely, if it does not work, it would be a horrible experience
- This concept would help shape thoughts during exploration
- The possibility of **dynamic filtering** is helpful
- I **don't want prompting** to be the only way to interact with the portal
- If you know the toolkit well, prompting is just an extra step
- When creating a proposal, the **additional suggestions** outside the toolkit could also be helpful
- While the option to open it in another tab is desired, there should be a **file preview** within the same tab



Concept #3

Summary of insights

The platform should offer a **specific search feature** to help users quickly find what they need. If the exact content isn't found, users should have the option to **expand their search with a more general exploratory approach** or by prompting. Additionally, suggested queries can help guide users toward relevant information. It should also be clear where the content originates to ensure trust and credibility.

Detailed insights

Developer

- This is the **easiest way to find** what I need
- I would **need categories**
- I would like to **see descriptions**

Product Manager

- **Suggest other queries**
- Have a **specific search feature**, if you don't find what you are looking for, have the option to have a more general exploratory search or prompt
- **Where did the content come from**

Sales

- **Onboarding is better done by a human being**
- It could provide an **end-to-end perspective of client engagements**
- It can be the link between partners and operational managers. This gives everyone a shared picture
- There should be a **description** for every tile
- The **vertical interface** is beneficial as a frequent way to use could be to have the toolkit as a compressed window beside the workspace of the user

Concept testing

Suggested direction based on concept testing

The concept should prioritize **ease of finding information** with a streamlined, structured approach. Users typically go straight to documentation, so content should be organized for quick access, avoiding barriers like chat-based navigation. A condensed, easy-to-scroll list enhances skimming, and long pages should include header links.

Search should be **specific and efficient, with clear query suggestions**. If users don't find what they need, they should have the **option to explore** more broadly or use Gen AI for summarization—though AI shouldn't replace direct navigation. Important content shouldn't be hidden behind tiles, and collapsible text can improve readability.

Developer and sales documentation should be separate, ensuring relevance. Content should be structured with clarity. Each content block should have an **identifiable owner or contact person** for accountability and for requesting access. The origin of content should also be clear to build trust.

Navigation should be intuitive, with main buttons leading directly to relevant themes. The experience should balance structured search for firm members seeking specific information with an exploratory mode for new users wanting to learn more about Converge.

Converge™ Toolkit

SalesDeliveryQuality assurance

Search the toolkit for tools that support your sales activities

K

Filters

Origination Showcase

Tom Watts · LendingUpdated on 03-05-2025

Explore a live demonstration of how SME loan origination works, highlighting key workflows and automation features that enhance efficiency and compliance.

Sales

Operational Playbook

Philip John · DFCUpdated on 03-05-2025

A structured guide detailing the end-to-end lending process, covering policies, best practices, and regulatory considerations to ensure a seamless client experience.

SalesDelivery

Market Insights & Benchmarking

Joy Wendy · RetailUpdated on 03-05-2025

Gain a competitive edge with industry benchmarks, market trends, and competitor analysis to optimize SME lending strategies.

Sales

Dynamic Pricing Model

Elisa May · SMEUpdated on 03-05-2025

Understand the principles of risk-based pricing, interest rate adjustments, and loan structuring to maximize profitability while maintaining affordability for SMEs.

SalesDelivery

Credentials & Capabilities Deck

Conor Roy · LendingUpdated on 03-05-2025

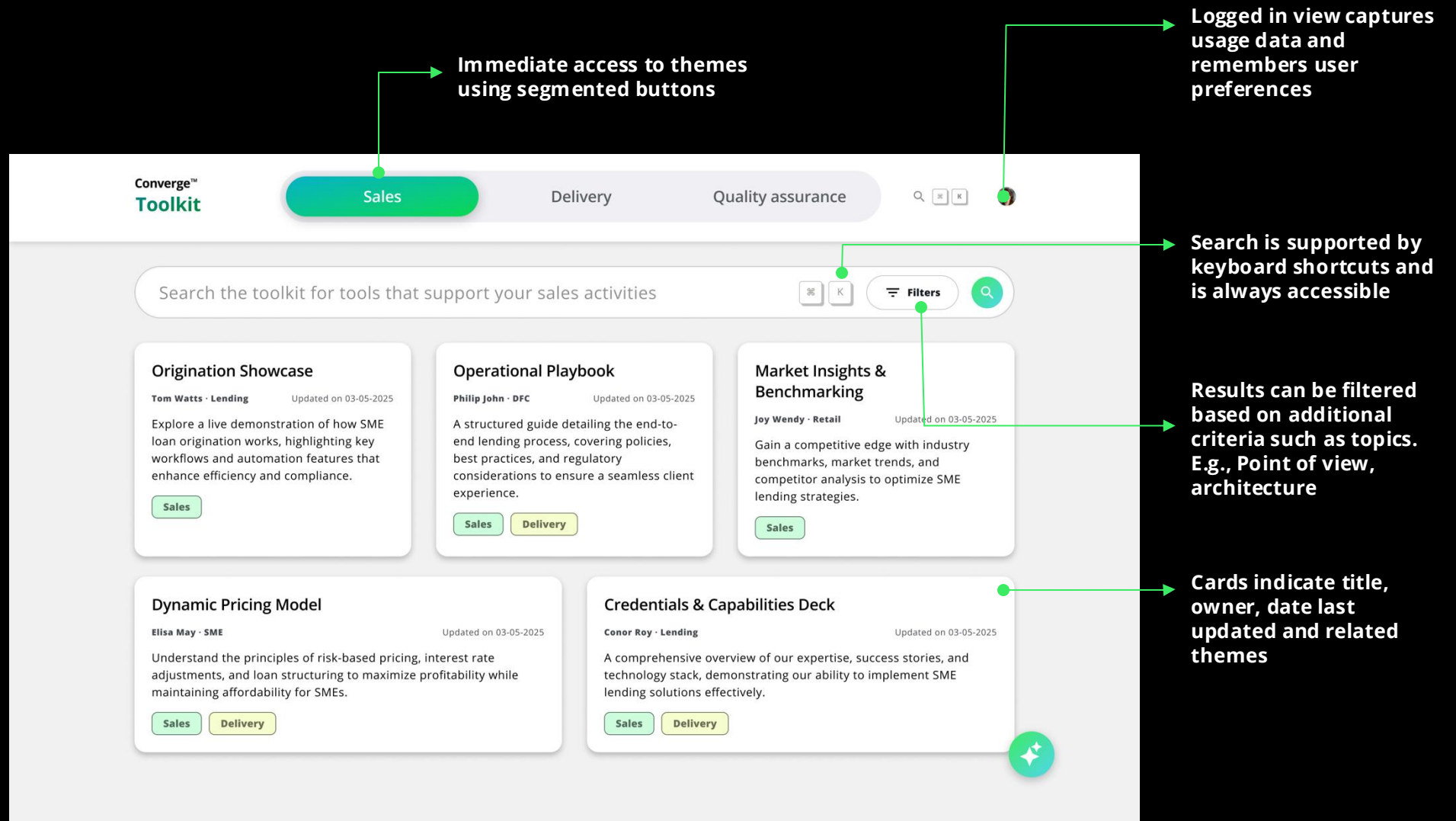
A comprehensive overview of our expertise, success stories, and technology stack, demonstrating our ability to implement SME lending solutions effectively.

SalesDelivery

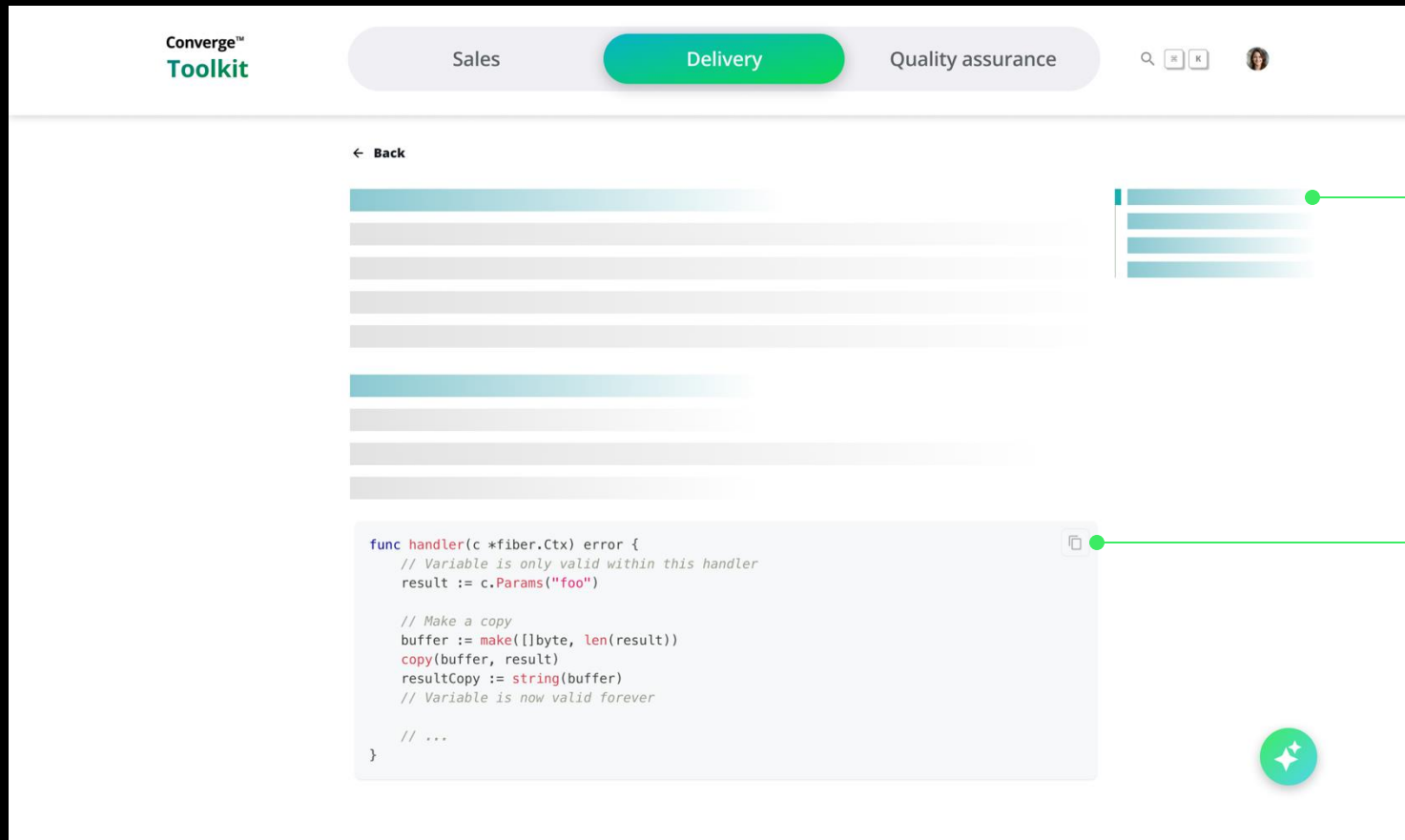
Converged Concept

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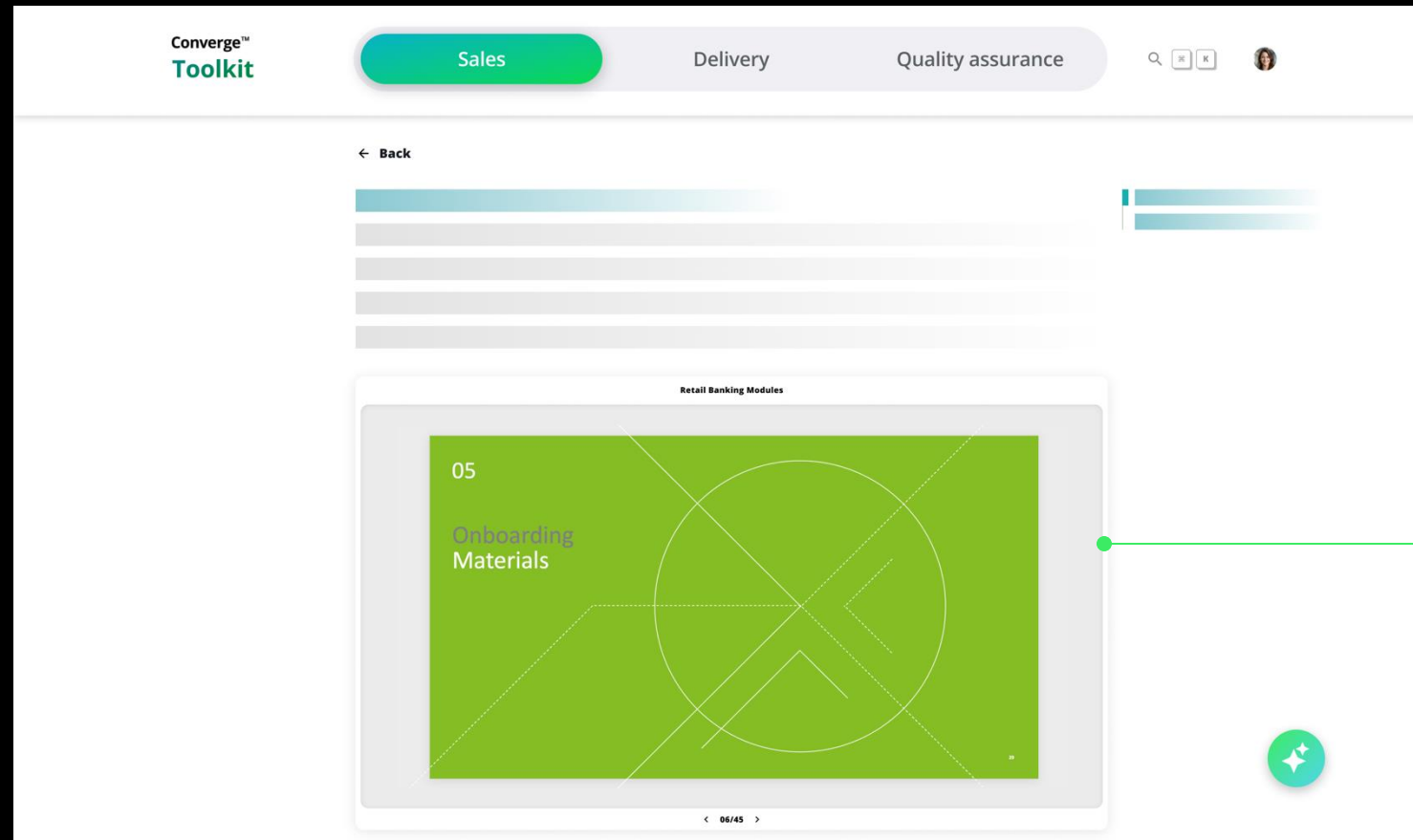
Vertical layout supports mobile and having the toolkit within a small window



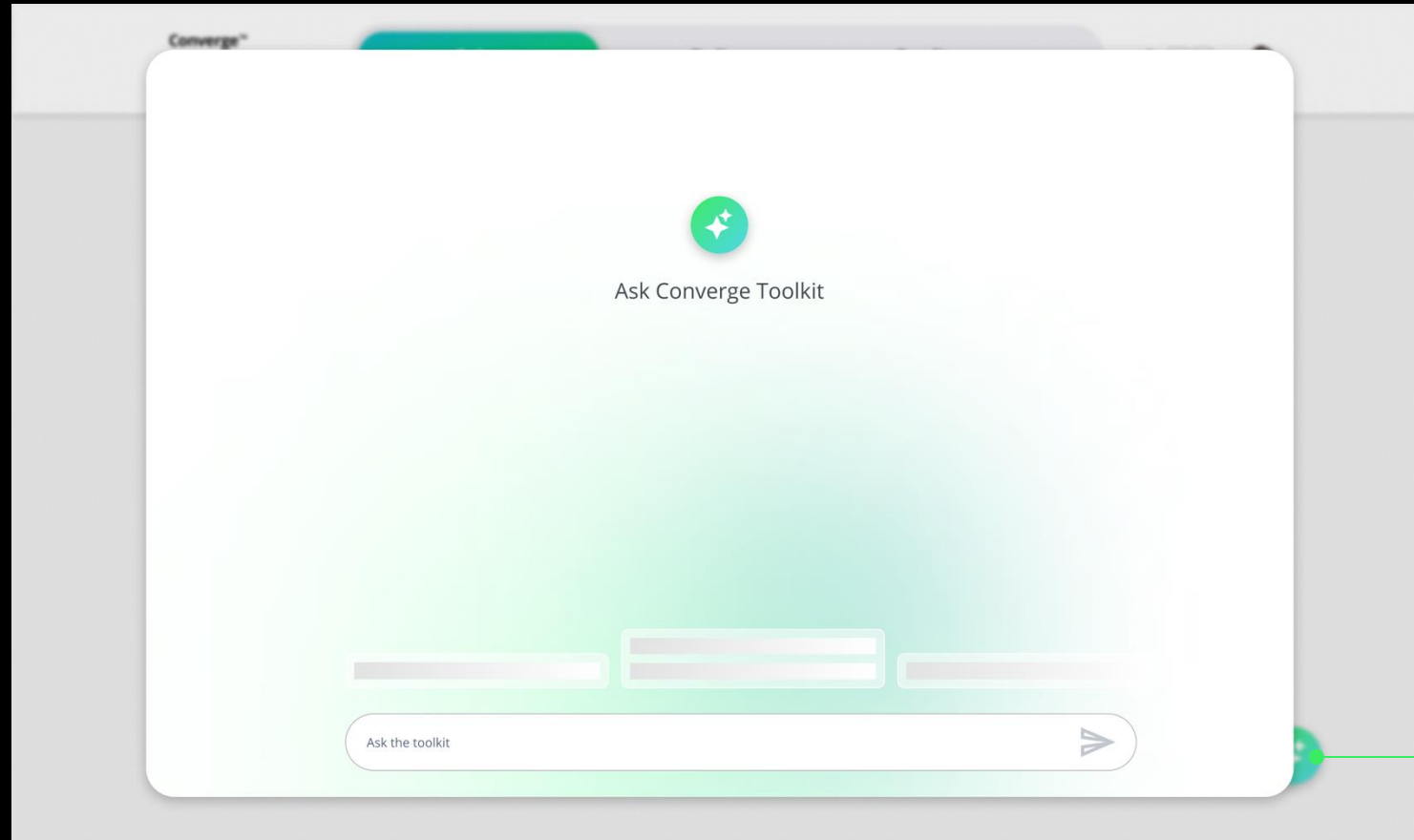
Header links based navigation that help users easily navigate to specific sections on the page

Dedicated view for code blocks that allows for easily copying code

Opening a tile, leads to the content opening in a larger view



Dedicated view for
previewing files such
as PowerPoint decks



An option to ask the toolkit for guidance in case the user cannot find what they want