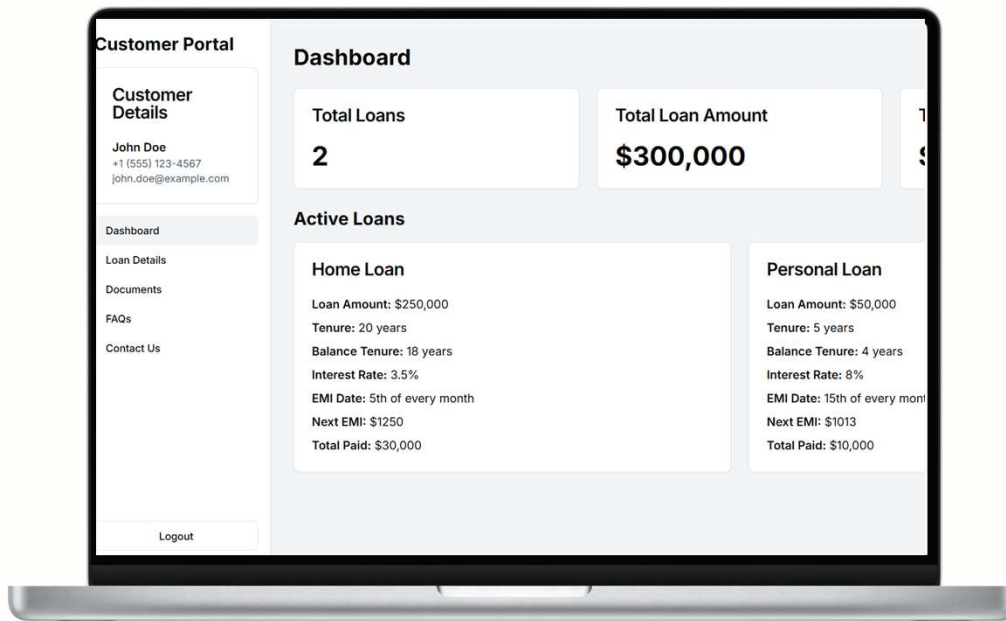# PRODUCT CASE STUDY

SARTHAK

xkey

OVERVIEW

Enhancing the Customer Portal Website

As a Product Analyst, I played a pivotal role in revamping the customer portal for a post-disbursement loan management system. The project focused on addressing user pain points, optimizing the customer journey, and delivering a seamless user experience. Key initiatives included introducing new login options, restructuring the dashboard, and enhancing the loan details section.

Product Demo Link: https://v0-customer-portal2-sarthakchitres-projects.vercel.app/

Login via Mobile Number and Password
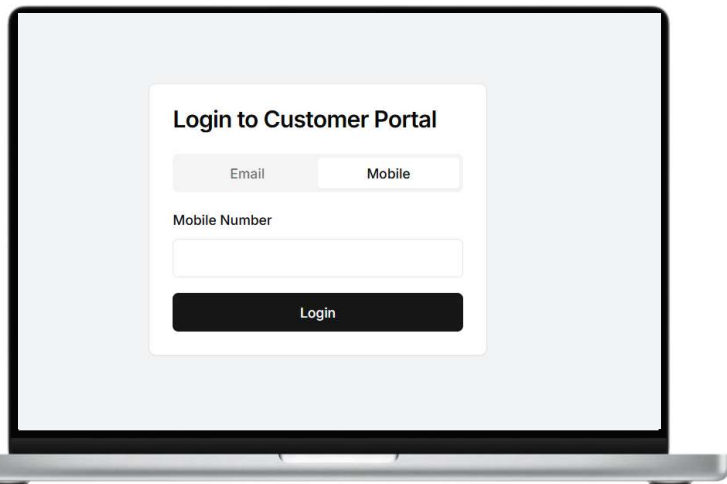
Challenge:

- The login process was limited to email and password, which many customers found inconvenient.
- Survey feedback highlighted the preference for mobile-based login.

Approach:

- Designed a comprehensive questionnaire to understand customer preferences for login methods.
- Decided against OTP-based login due to potential security risks and concerns over misuse.

Outcome:

- Improved login experience by introducing a widely preferred and secure option.
- Increased login success rate and reduced friction during onboarding.

Login to Customer Portal

Email | Mobile

Mobile Number

Login

Restructuring the Dashboard Section
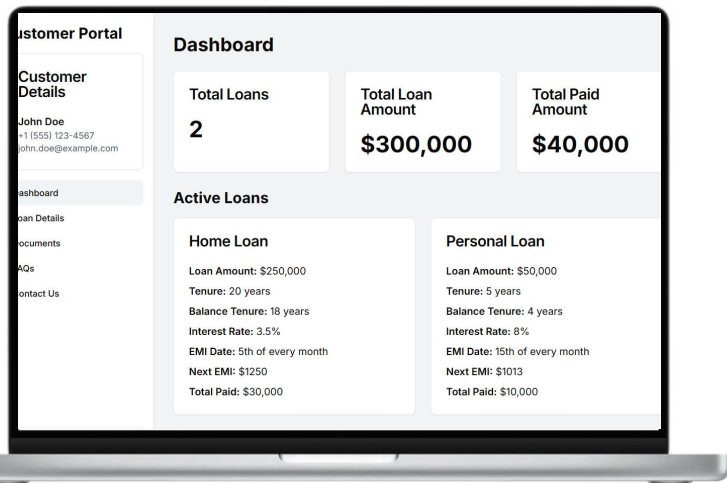
Challenge:

- The dashboard section being the home page after login, provided limited functionality, displaying only basic loan metrics (active loans, total amount, and paid amount).
- Meanwhile, the Loan Summary section, containing key details, received higher engagement.

Approach:

- Analyzed user insights using Google Analytics to identify low engagement in the dashboard section.
- Consolidated the Loan Summary content into the dashboard to create a single, informative landing page after login.
- Conducted usability testing to ensure a smooth transition for existing users.

Outcome:

- Improved the purpose and functionality of the dashboard as the homepage.
- Enhanced user experience by reducing navigation steps, leading to a 40% increase in dashboard engagement.

# Adding a Feature Section in the Loan Details Tab

Challenge:

- A significant portion (30%) of customer service requests were related to loan product features, indicating a gap in self-service capabilities on the portal.

Approach:

- Collaborated with the customer-centricity team to identify frequently asked questions and concerns.
- Added a comprehensive feature section in the Loan Details tab, detailing product features, terms, and benefits.

Outcome:

- Reduced customer service requests related to loan features by 20%.
- Improved customer satisfaction with better transparency and accessibility.
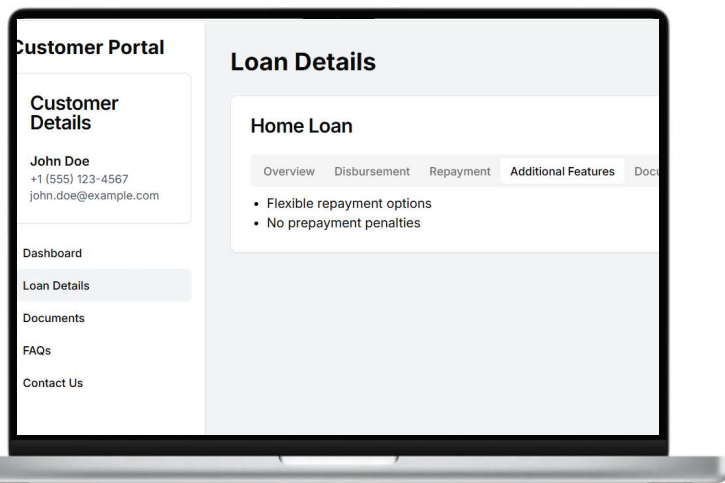
IMPACT & RESULTS

	BEFORE	AFTER
NPS	6	8.5
Avg Session Time	7 min	5 min
Service Requests	20%	

Additional Contributions:

- **Designed a CSAT Questionnaire:** Focused on accessibility, usability of financial summary, transaction history, documents, FAQs, and areas for improvement.
- **Wireframing:** Created prototypes for new features using Figma, ensuring alignment with user expectations.
- **Visualization**: Google Analytics for tracking website performance