





Analysis of the Old and New UI Design

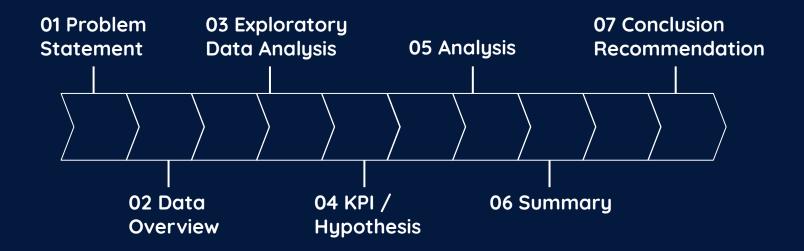
Vanguard

Who we are

- Leading investment management company based in Malvern, Pennsylvania
- Today, Vanguard is one of the world's largest asset management firms
- Managing over \$7 trillion global assets



Roadmap







- Evolving Digital Expectations: As the digital world evolves, Vanguard's clients expect a more intuitive and modern online experience
- Current UI Challenges: The existing UI may not meet contemporary usability standards, leading to client frustration and drop-offs during online processes
- **Strategic Goal:** Vanguard aims to enhance the online experience by implementing a more intuitive UI and timely in-context prompts
- **KEY QUESTION:** Will these improvement encourage more clients to successfully complete their online task?

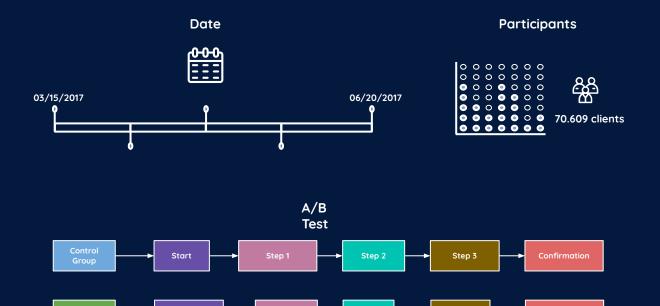
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Data Overview



Step 2

Step 3

Confirmation

Test Group

Start



Data Overview

Datasets

Experiment Roaster

List, which clients were part of experiment (70.609 unique clients) **Client Profiles**

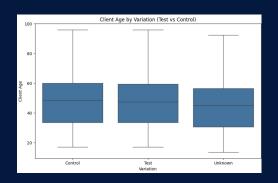
Demographics (age, gender, account details)
(70.609 unique clients)

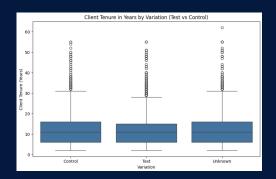
Digital Footprint

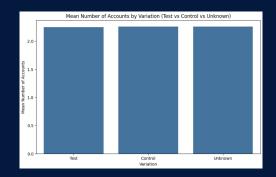
Detailed trace of client interactions online (343.141 activities)

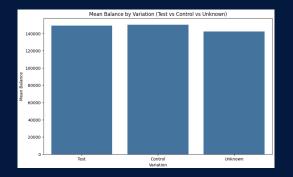


Exploratory Data Analysis













KPI: Completion Rate

Hypothesis 1: c(UI_new) > c(UI_old) New UI has a higher completion rate

KPI: Time Rate

Hypothesis 3: t(UI_new) < t(UI_old) Faster time during every step for new UI **KPI: Error Rate**

Hypothesis 2: e(UI_new) < e(UI_old) Less error rate for new UI Design

KPI: Visit Rate

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KPI: Visit Rate



1 Completion Rate

2 Error Rate

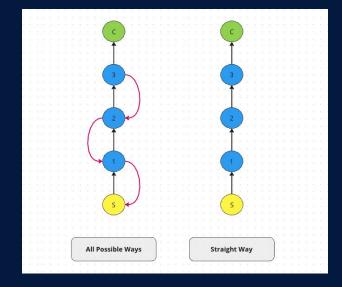
3 Time Rate

4 Visit Rate



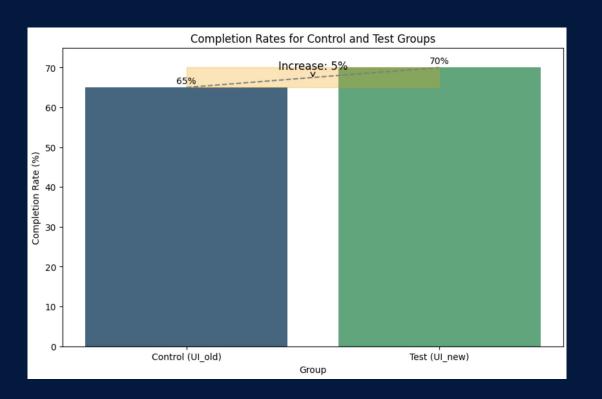


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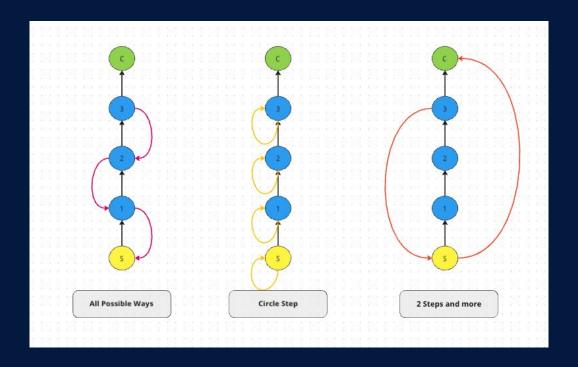
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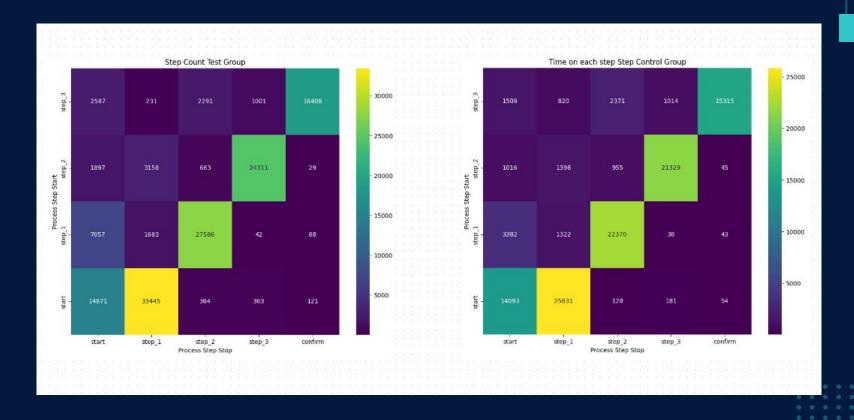
2 Error Rate

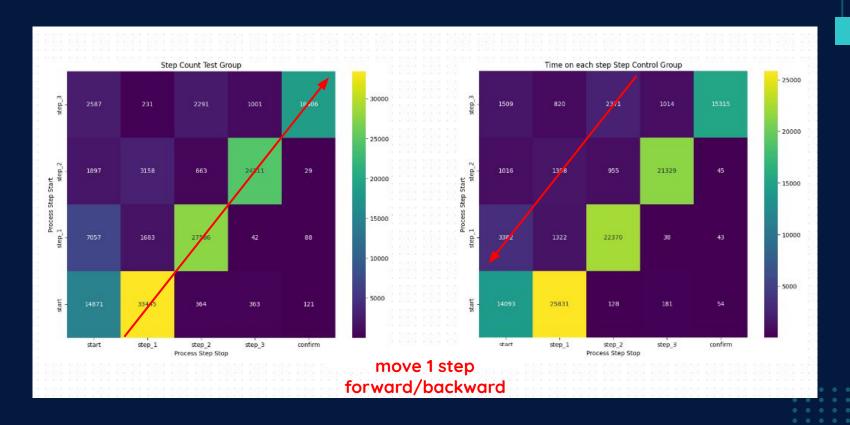
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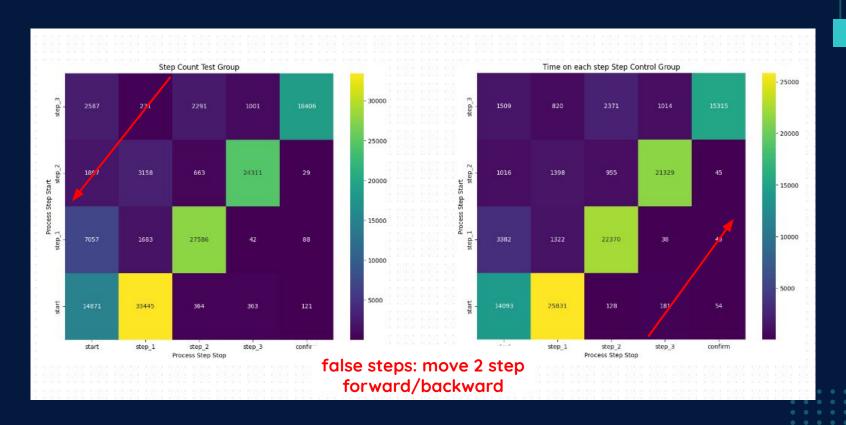
4 Visit Rate

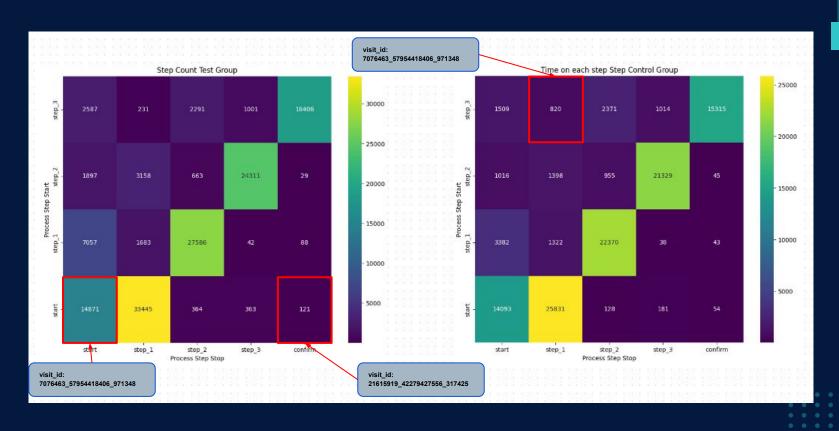


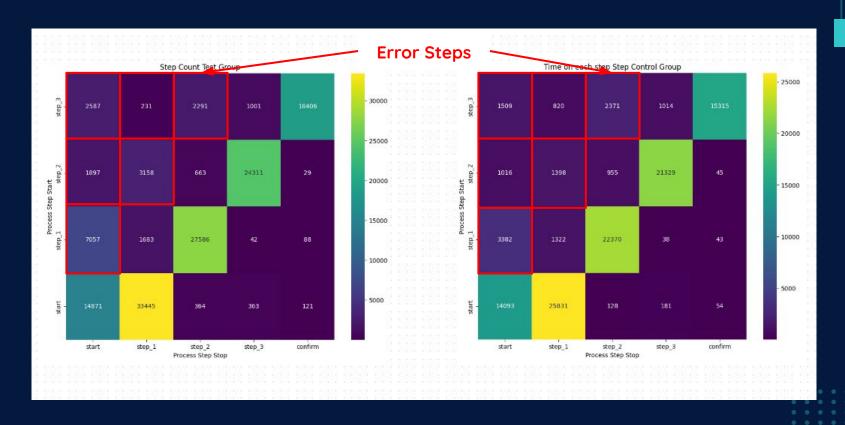


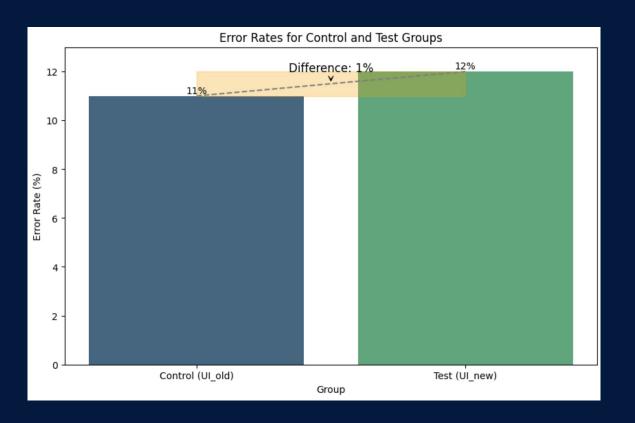












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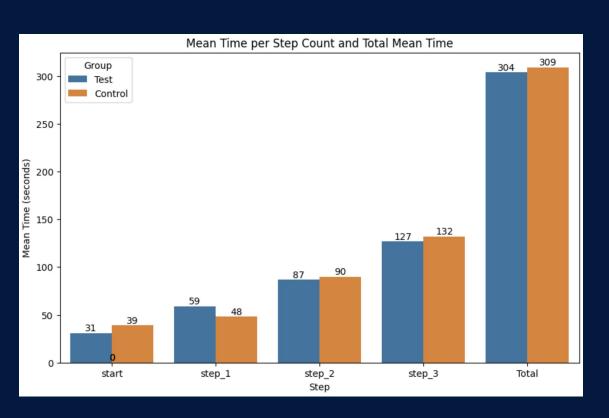
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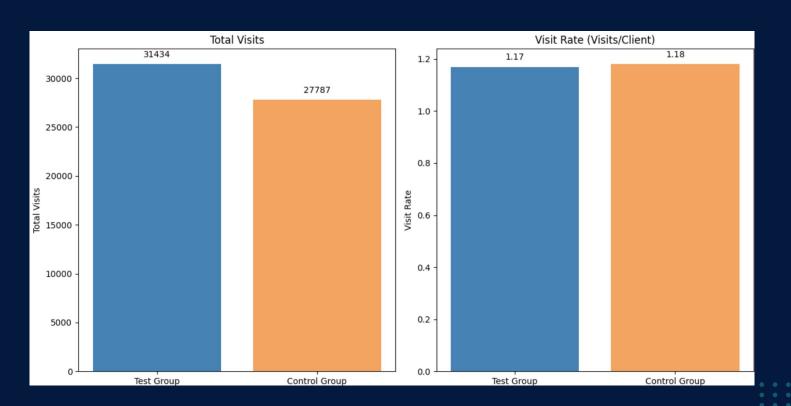
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• Completion Rate:

- -New UI has led to a 5% increase in the completion rate compared to the old UI
- -Z-Test: Reject Hypothesis

• Error Rate:

- -Error rate has remained almost the same
- -Might be influenced by users trying to navigate through the process to get an overview before completing
- -Z-Test: Reject Hypothesis

• Time Rate:

- -Similar to the error rate, the time rate has not significantly changed -Users may first explore the process and then start from beginning
- T-Test: Reject Hypothesis

• Visit Rate:

- -The visit rate remains nearly identical between the new and old UIs, indicating that the frequency of users has not been affected by the UI change
- Chi-2-Test: Reject Hypothesis

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- Positive Brand Perception: A modern, intuitiv UI enhances Vanguard's brand image, positioning the company as a leader in investment management
- Higher Client Investment Potential: Satisfied and engaged clients are more likely to increase their investments, directly constributing to Vanguard's profit growth

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- Implementing these small changes leads to a significantly better UI, resulting in numerous financial advantages for Vanguard

"In any moment of decision, the best thing you can do is the right thing, the next best thing is the wrong thing, and the worst thing you can do is nothing."

—Theodore Roosevelt



Thank you