**JULIA**

Hello?

**ME**

Hi, Julia. How are you?

**JULIA**

Good, thanks! You?

**ME**

Great.

I’ve received your feedback from the User Stories. Thanks very much!

**JULIA**

No problem! I really liked the exercise. It lets you put the operational and user needs right at the heart of the project.

**ME**

That’s exactly it! It’s a valuable exercise, and it means that I’ve been able to create the first mock-up, which I’ve sent over. The goal is to respond as closely as possible to the needs of the people who will be using the dashboard.

Before getting down to business, I wanted to just flag that there’s personal data in the sample I received – customer names.

**JULIA**

Oh, really? I told them to send over anonymized data!

**ME**

Don’t worry, I’ve deleted the data, but you should probably get in touch with your Data Protection Officer to let them know and make sure official procedure is put in place.

**JULIA**

You’re right – I hadn’t thought of that. I should get in touch with the department. I’ll look into that. Thank you, though, for deleting the sensitive data.

**ME**

No problem :) Would you have time to talk about this mock-up, to see if there’s anything that needs improving?

**JULIA**

Yes – I have it in front of me right now!

**ME**

Great! So based on the User Stories, I’ve created four pages on the dashboard:

* An application overview page, which has key information about business activity linked to mortgages, pending files and the borrower score,

**JULIA**

Ok.

**ME**

(continuing)

* A page for monitoring branch performance that lets you visualize their relative business performance and the quality of their mortgage application files,

**JULIA**

Great.

**ME**

(continuing)

* A page for monitoring customer indicators that includes your indicators for Global Bank’s customer portfolio,

**JULIA**

(agreeing)

Uh huh!

**ME**

(finishing)

* And last of all, a home page to guide users through the dashboard.

**JULIA**

Yes, great – that’s what I’d gathered.

I think this is already looking like a tool that could help our branch advisors.

But I have a few questions.

**ME**

Shoot!

**JULIA**

First of all, I don’t want everyone to have access to all areas of the dashboard. How will you handle data confidentiality?

**ME**

Great question.

I’d planned to create admin roles on the dashboard.

So when branch advisors or managers log on, they’ll only have access to their branch. They won’t be able to see data from other branches.

**JULIA**

Ok, perfect.

Next question: I can’t see the borrower score. Am I missing something?

**ME**

No, that’s right. There are still a few features I need to develop before I can get to the borrower score. I’ll do that over the next two weeks using your rules for approving or rejecting mortgage applications.

But before I get to that, I need to reconcile all of the data tables, which hasn’t been done yet. I also need to automate corrections to the family circumstances table.

**JULIA**

Ok great – that’s all clear. I can’t wait to see the end result and show it to our advisors. This has been a really reassuring update – this is turning out to be really what we’re looking for. This tool will save our teams a lot of time.

**ME**

Fantastic! I’m happy you’re happy.

**JULIA**

Shall we touch base again in two weeks?

**ME**

Works for me!

**JULIA**

Perfect. Speak soon!

**ME**

Speak soon, Julia!