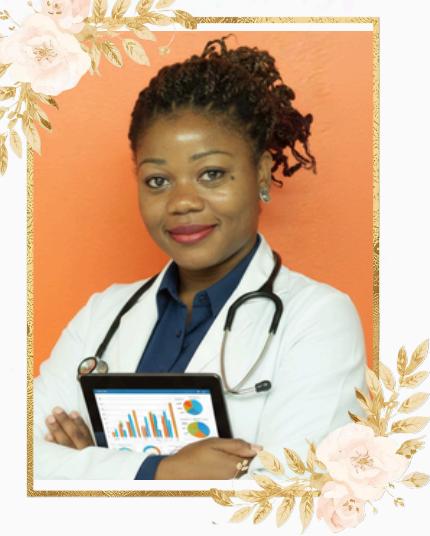




Helena Sospedra
Project Manager



Davy Goupil
The Doctor



Hoai Thuong
The Seller



Pedro Ferreira
The Cooker



Introduction

Context

Vanguard launched a **digital experiment** to improve an online client process.

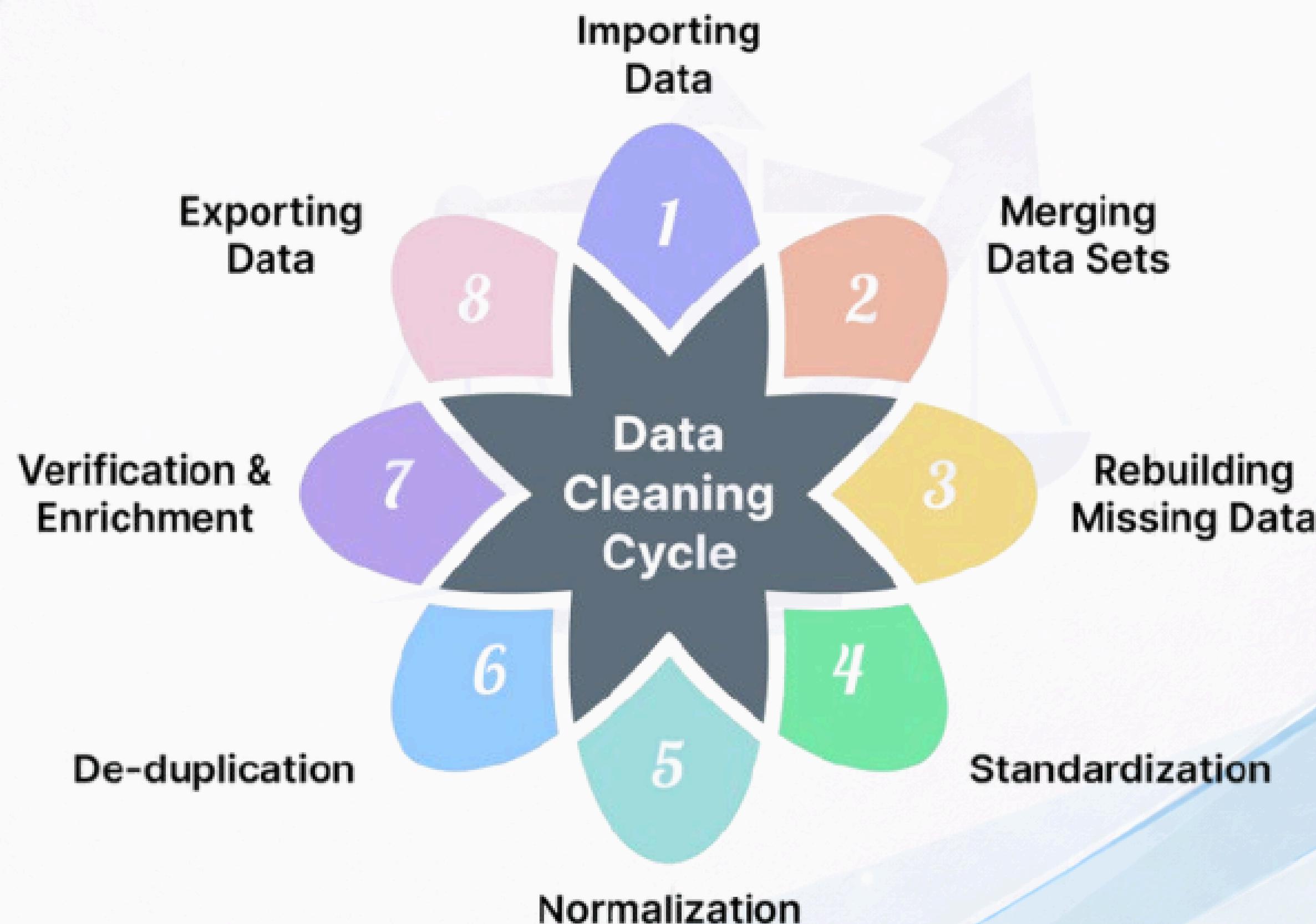
A **new user interface** (UI) with in-context prompts was tested.

Objective

Evaluate whether the new UI improves user experience and process completion.

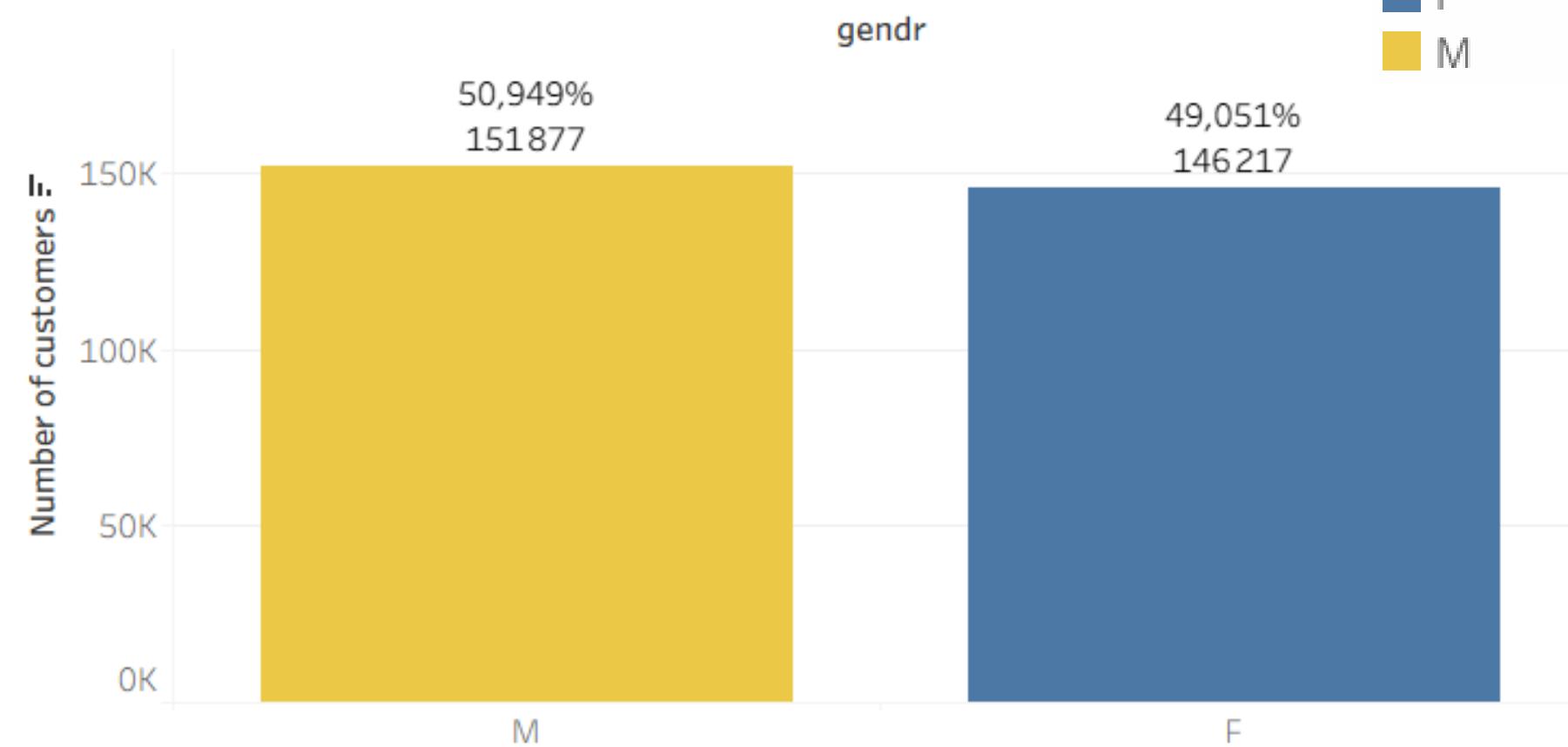
Did the new UI lead to higher completion rates compared to the previous design?

Data Cleaning & Merging Process

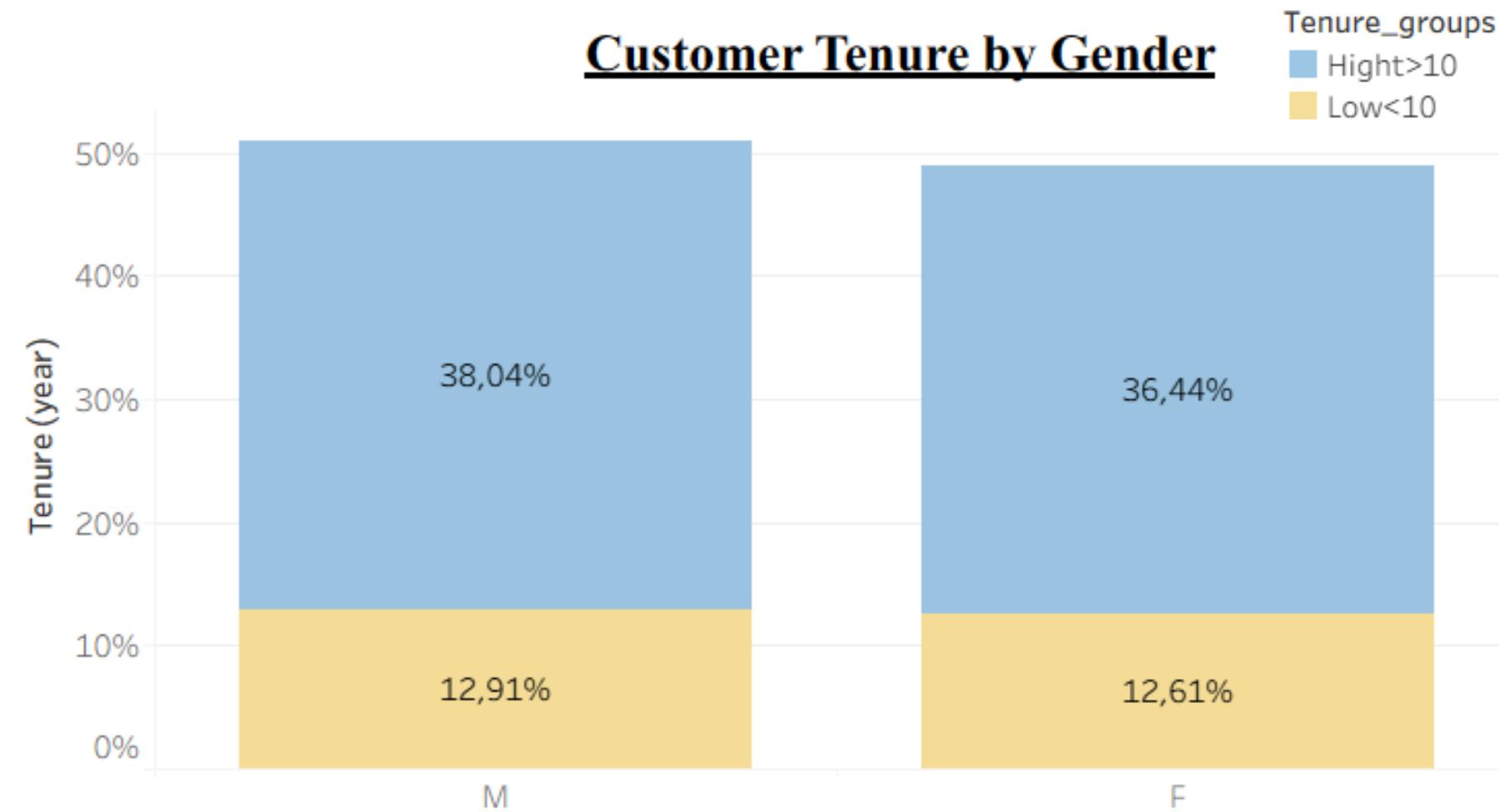


Data Overview

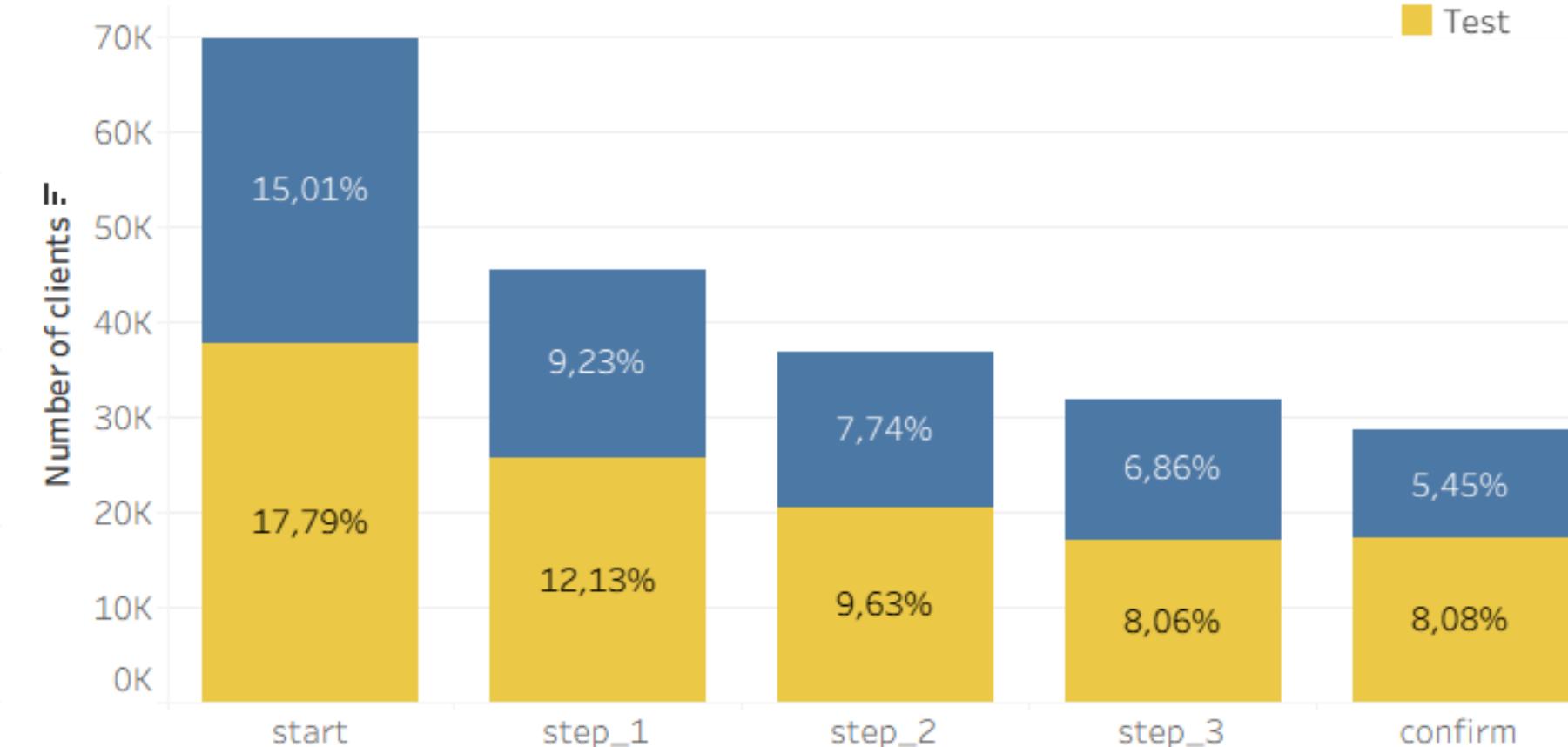
Gender Breakdown



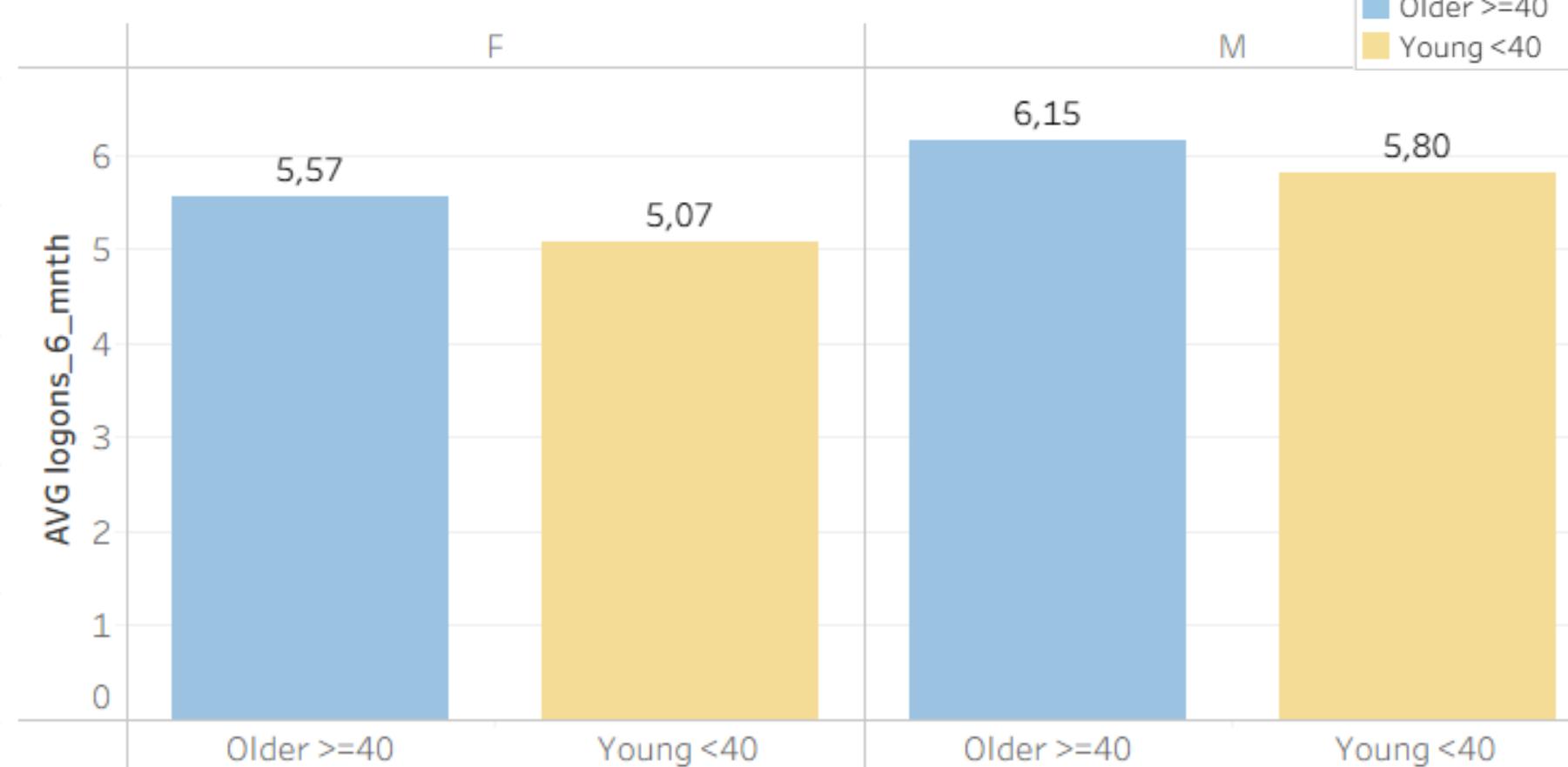
Customer Tenure by Gender



Distribution of variation by process steps



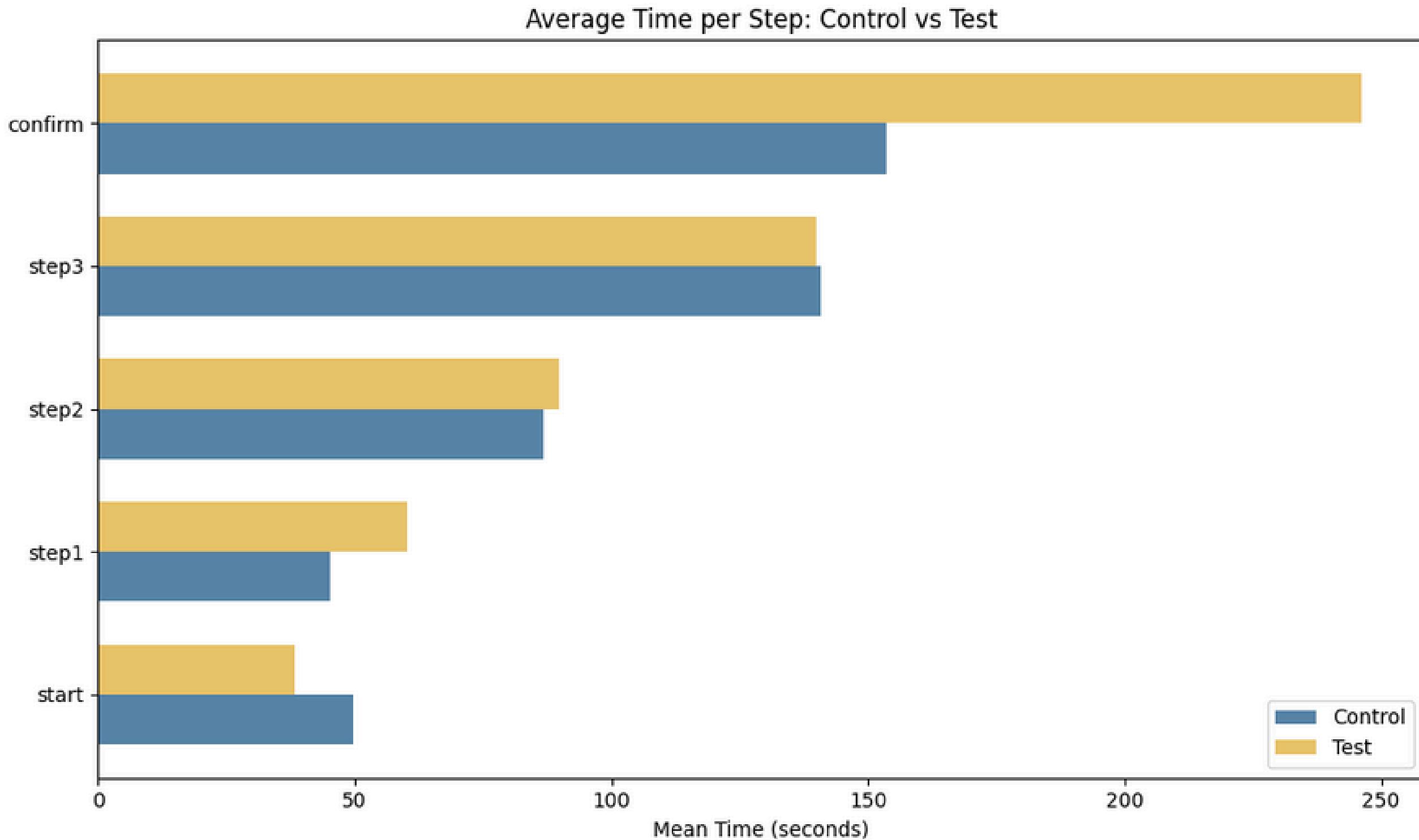
Login Activity



Time spent per step

The Test group starts the process faster, but is slightly slower across most remaining steps, especially at confirmation.

Differences relative to the Control group are modest.

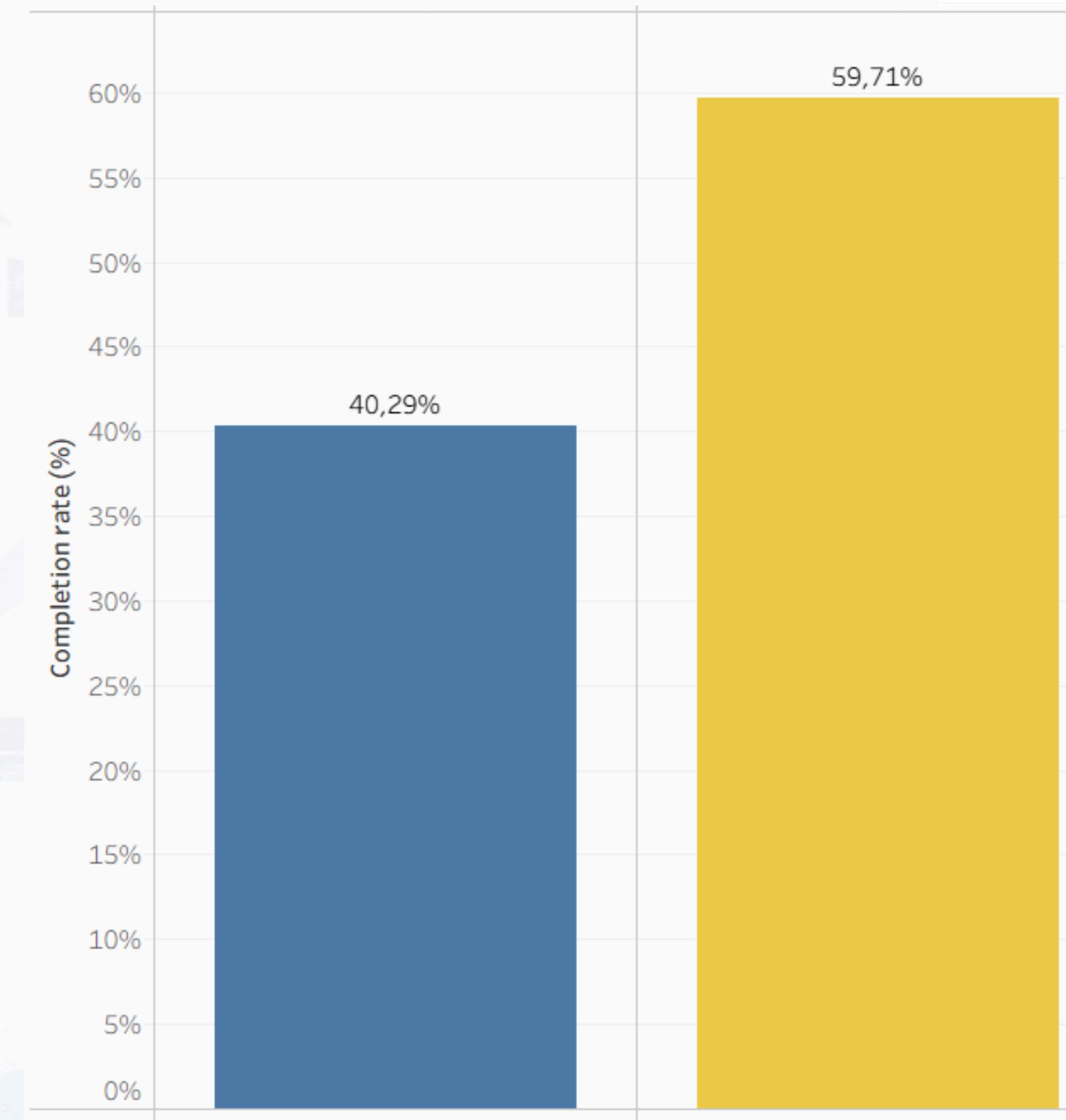


Completion rate per variation

Control
Test

H: There is no difference in completion rates between the Control and Test groups.

The **Test group** shows a **higher completion rate** than the Control group, indicating **improved effectiveness** in guiding users through all process steps.

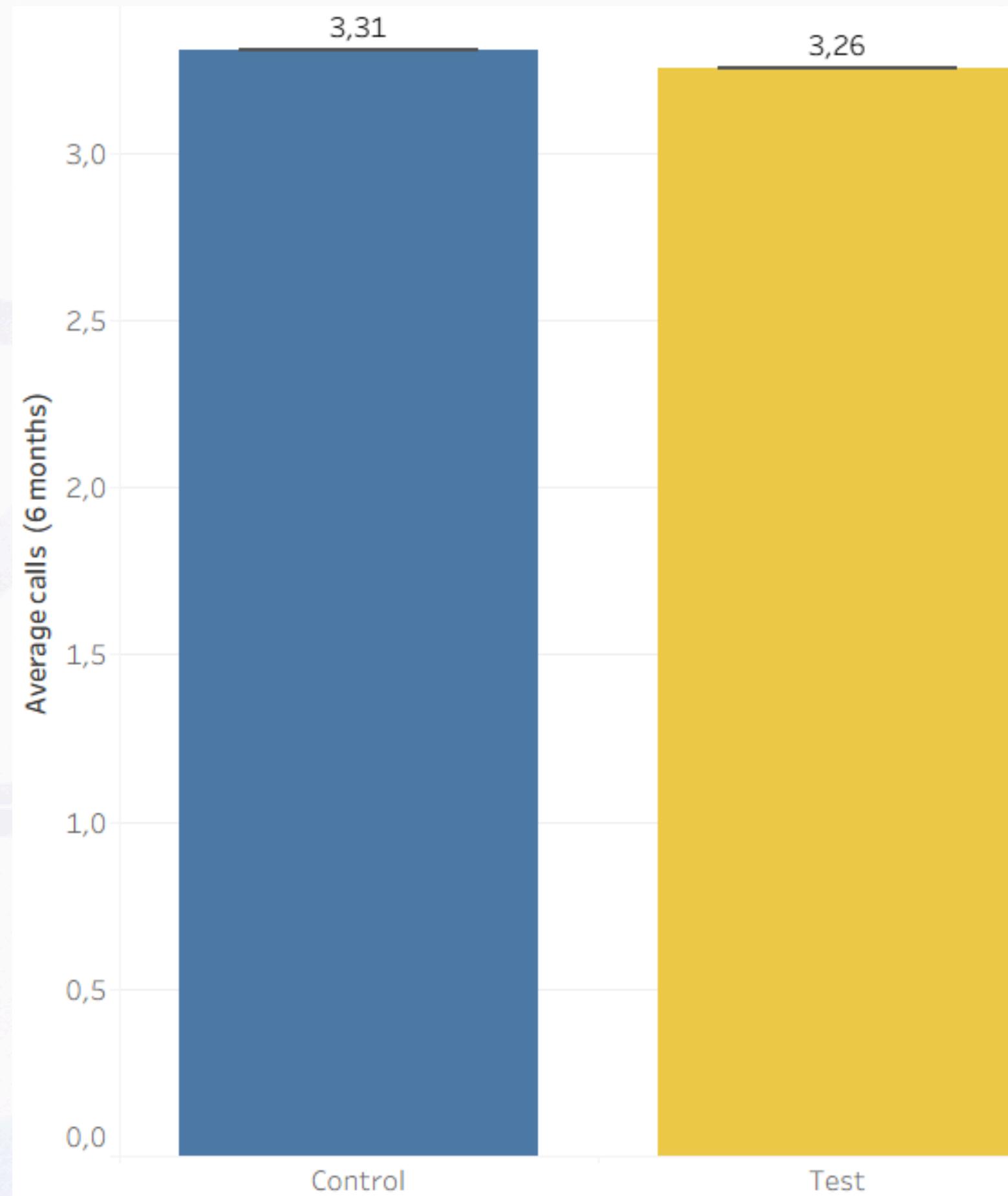


Average calls per client

Control
Test

H: There is no difference in the average number of call center contacts between the Control and Test groups.

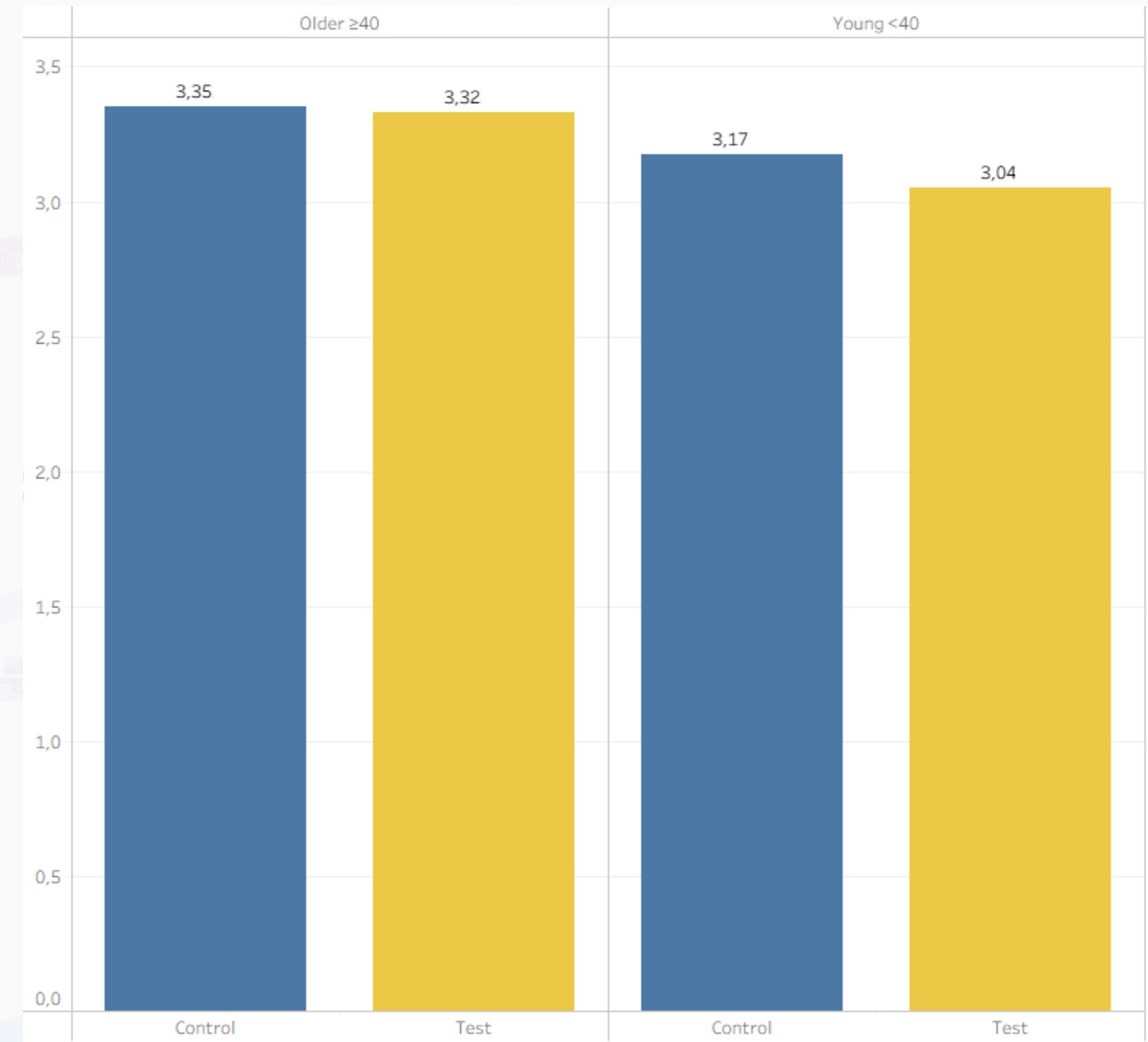
The Test group shows a **slightly lower average number of calls** compared to the Control group, suggesting improved self-service behavior.



Average calls by age group

H: younger group contact support less frequently than older clients

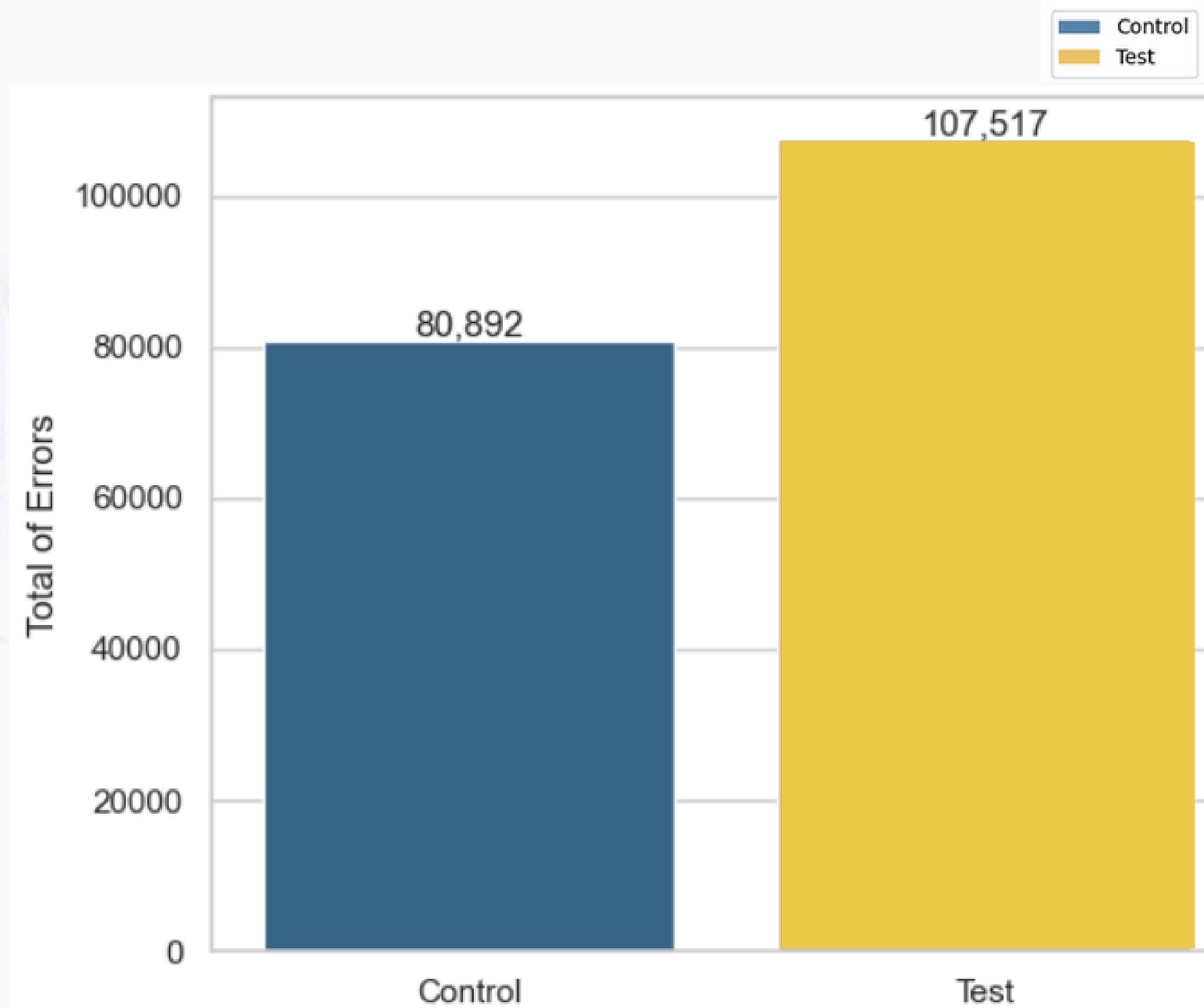
The **reduction in call volume** observed for the Test group is consistent across age groups, with a stronger effect among younger clients.



Total of Errors

The Test group shows a **higher total** number of errors.

This reflects higher usage and completion volume, **not necessarily lower usability**.

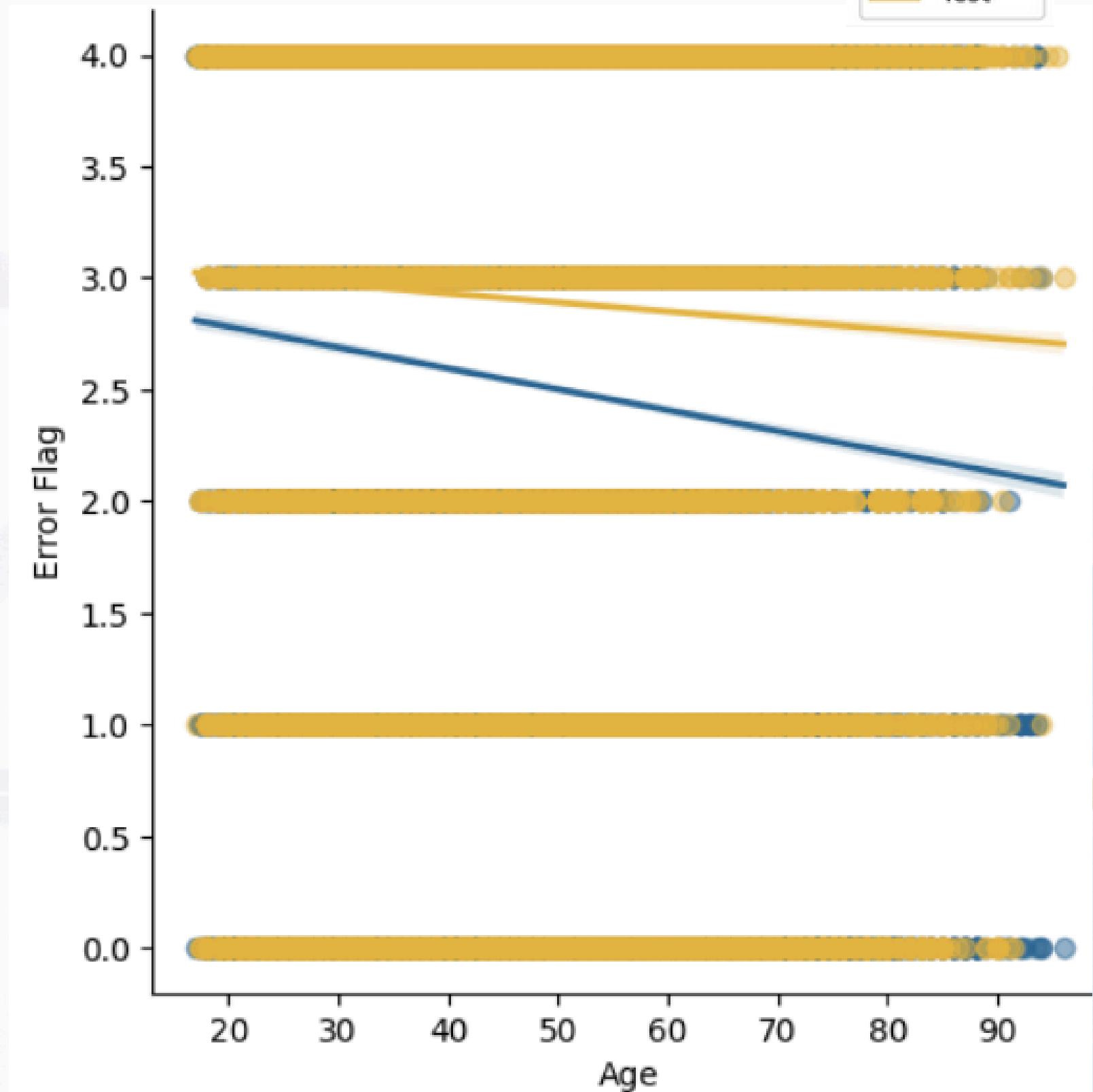


Age-Error correlation

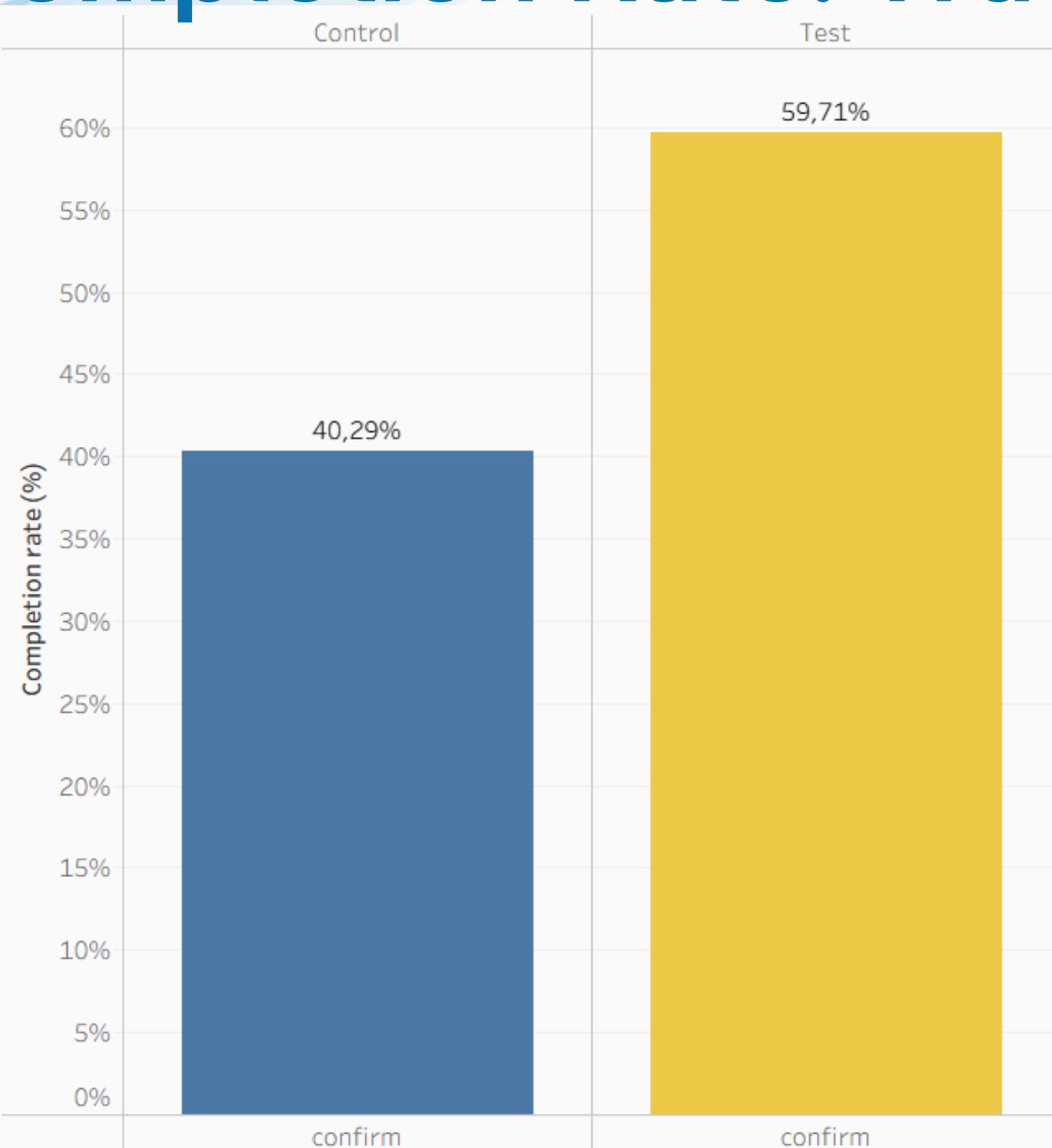
Errors are observed **across all age groups** in both Control and Test variations.

No clear linear relationship is visible between age and error frequency.

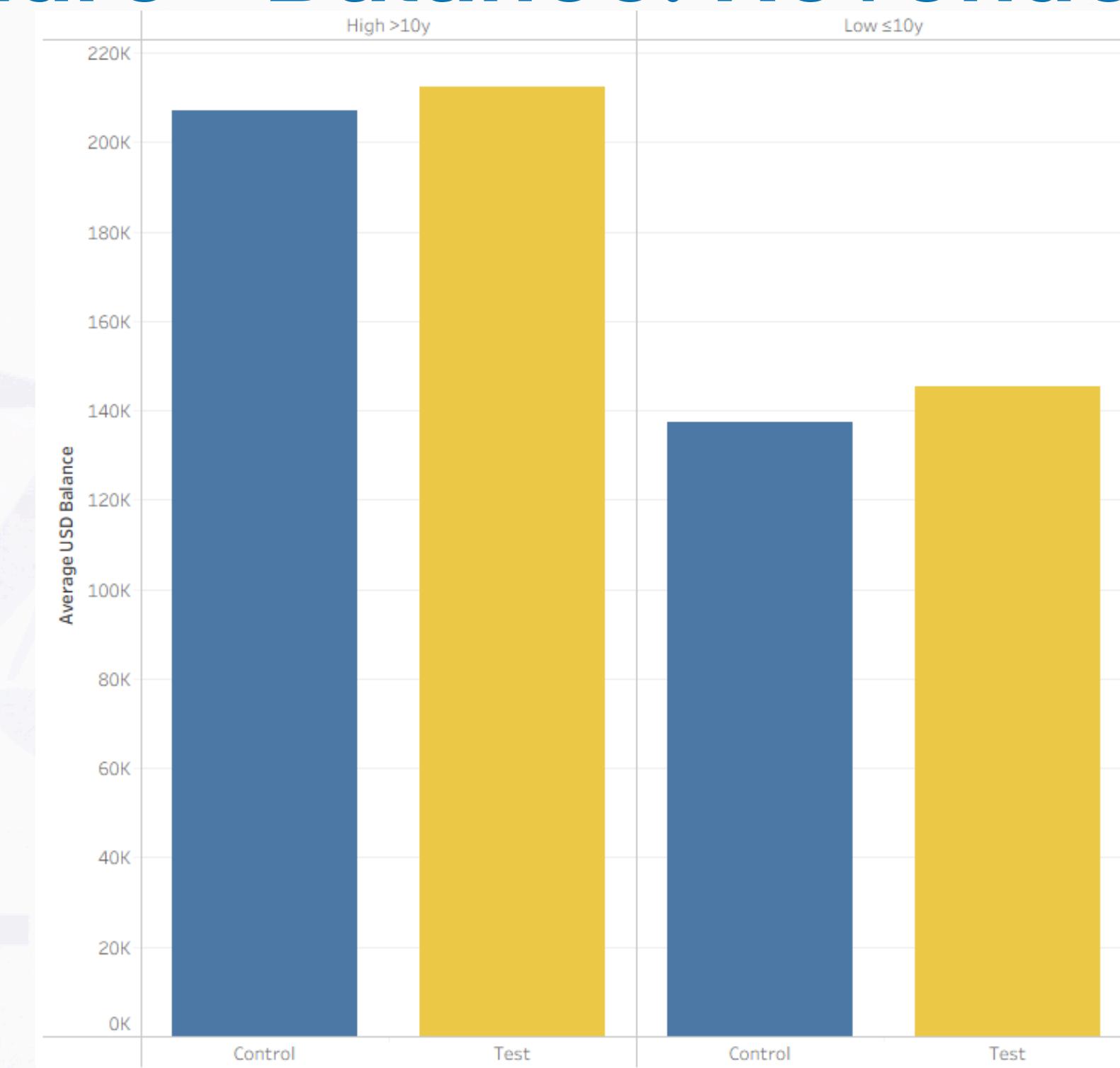
This suggests that **age alone is not a strong predictor** of errors during the process.



Completion Rate: Trust



Tenure - Balance: Revenue



Test is MORE trustable (59% vs 40% completion), Test self-service success DIRECTLY causes higher balances... we can see customers with more than 10 years of tenure have more balance, besides of that the control have more lowest balance than the Test version in all ages.

Perfect cycle: Better UX, More transactions then more revenue. So, Test creates client trust and bank profits simultaneously.

Tableau Visualizations

Tableau Public - projet2

Fichier Données Feuille de calcul Tableau de bord Histoire Analyse Carte Format Serveur Fenêtre Aide

Tableau Desktop Public Edition Acheter Tableau

Tableau de bord Disposition <

Par défaut

Téléphone

Aperçu de l'appareil

Taille Automatique

Feuilles

- Client Tenure - ...
- Login Activity - ...
- Experiment - ...
- 1. Completion
- Age-Error Correlation
- Call per client
- Variatic
- Feuille 4
- Feuille 5

Objets

- Conteneur horizontal
- Conteneur vertical
- Texte
- Extension
- Métrique Pulse

Sections Flottant

Afficher le titre du tableau de bord

Age groups

Total Clients

200K
150K
100K
50K
0K

Older >=40

214545
71.98%
age_group:
Total de client_id:
% du total Total de client_id dans Table (horizontale): 71.98%

28.02%

Age-Error correlation

variation

0,0100
0,0080
0,0060
0,0040
0,0020
0,0000

Control
Test

0,003340
0,009205

Average calls (6 months)

Average calls (6 months)

3,5
3,0
2,5
2,0
1,5
1,0
0,5
0,0

Control
Test

3,17
3,05

Variatic

variation / process_step

Test
Control

60,10%
4753
39,90%
3156

% sur le total Total de visit_id

60%
40%
20%
0%

confirm

confirm

Detailed description: The dashboard displays four distinct data visualizations. 1) A bar chart titled 'Age groups' showing the total number of clients (Y-axis, 0K to 200K) across two age groups: 'Older >=40' (light blue bar, 71.98% of total) and 'Young <40' (yellow bar, 28.02% of total). 2) A bar chart titled 'Age-Error correlation' comparing the correlation values for 'Control' (blue bar, 0.003340) and 'Test' (yellow bar, 0.009205). 3) A bar chart titled 'Average calls (6 months)' comparing the average number of calls per month for 'Control' (blue bar, 3.17) and 'Test' (yellow bar, 3.05). 4) A stacked bar chart titled 'Variatic' showing the percentage of total visits ('% sur le total Total de visit_id') for 'Test' (yellow, 60.10%) and 'Control' (blue, 39.90%) across two process steps: 'confirm' (bottom) and 'process_step' (top).

Teamwork & Project Management



Challenges & Learnings



GitHub

+ a b l e a u®

Conclusions

Improved Completion Performance
Enhanced Self-Service Efficiency

Consistent Benefits Across Demographics

Association with Client Value

Test Version: Approved



MOST IMPORTANT CONCLUSION

DEPLOY TEST VERSION IMMEDIATELY
ACROSS ALL CLIENTS!!



Thank-you

Helena Sospedra
Davy Goupil
Hoai Thuong
Pedro Ferreira