

Customer Experience

VANGUARD

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DATA OVERVIEW

CLIENTS



Problem Statement

CONTROL



WEB FORM

A white, vertical, rectangular control form with a dark blue header containing the text "WEB FORM". Below the header are ten horizontal black bars of varying lengths, representing a list or a series of input fields.



TEST



NEW FORM

NE

STEP

THE

STEP

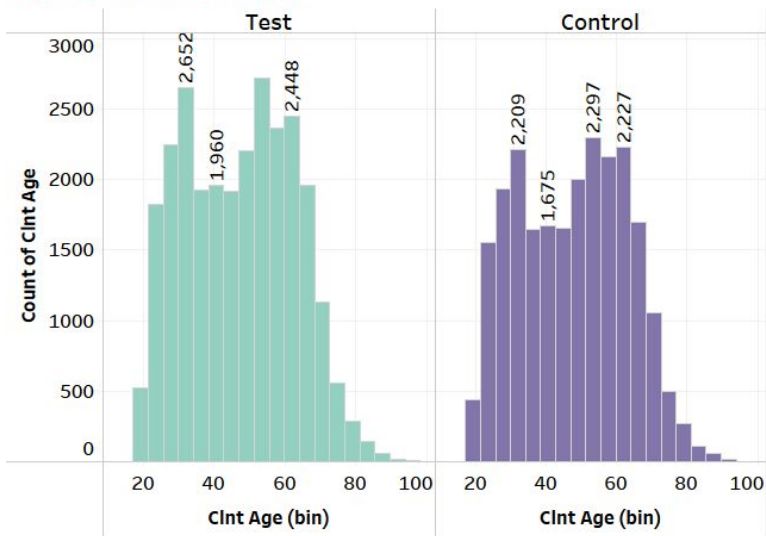
IXGRTQORET

A blue, vertical, rectangular test form with a yellow star in the top left corner. The form has a header "NEW FORM" and several input fields. The fields contain the text "NE", "STEP", "THE", "STEP", and "IXGRTQORET". There are also two yellow buttons, one next to the "STEP" field and one at the bottom right.

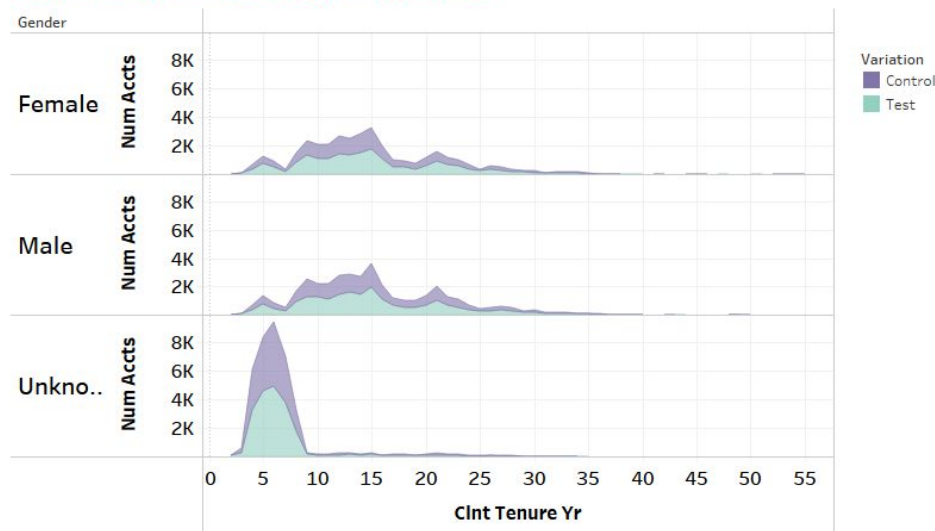
Does the new UI lead to higher completion rates?

EDA

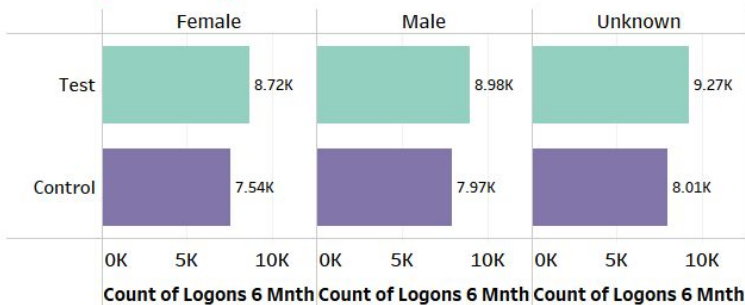
Age distribution of clients



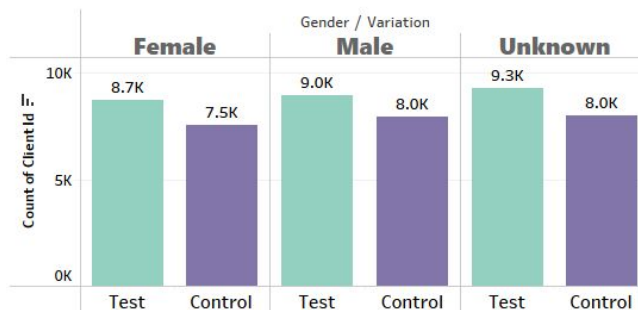
Totla Number of Accounts by Client Tenure



Total Login count by Gender



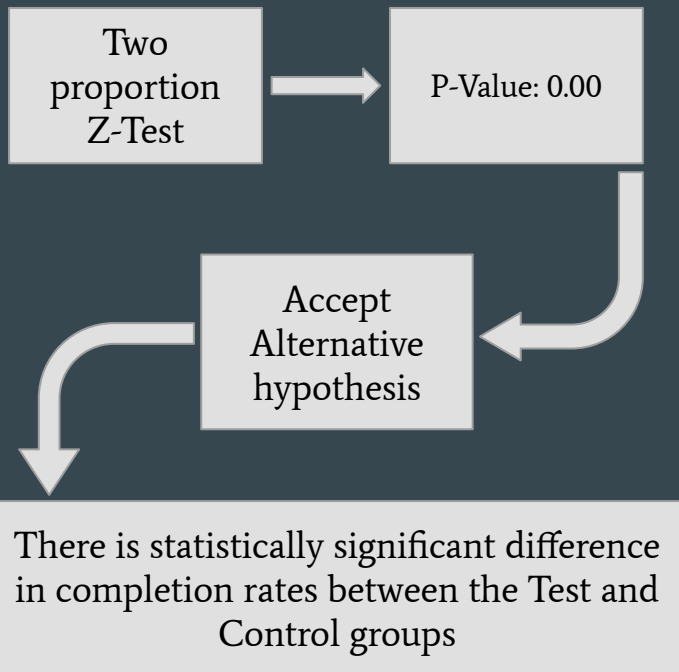
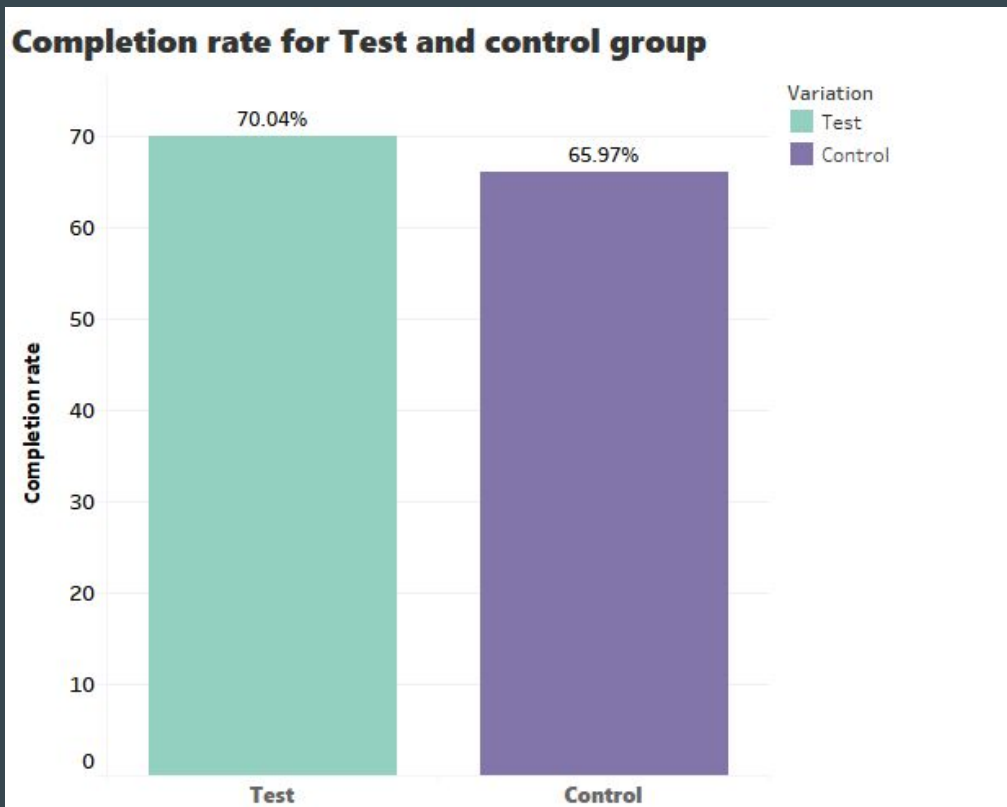
Gender Distribution of Process by Experiment type



PERFORMANCE METRICS

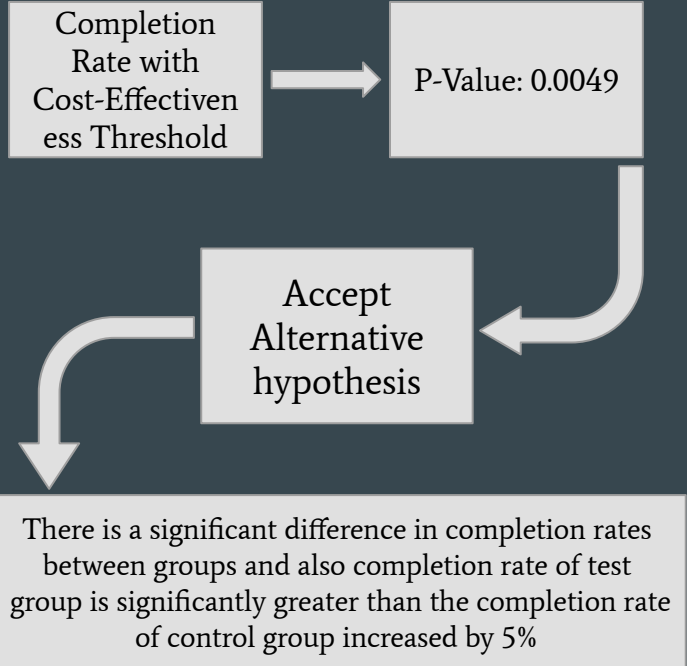
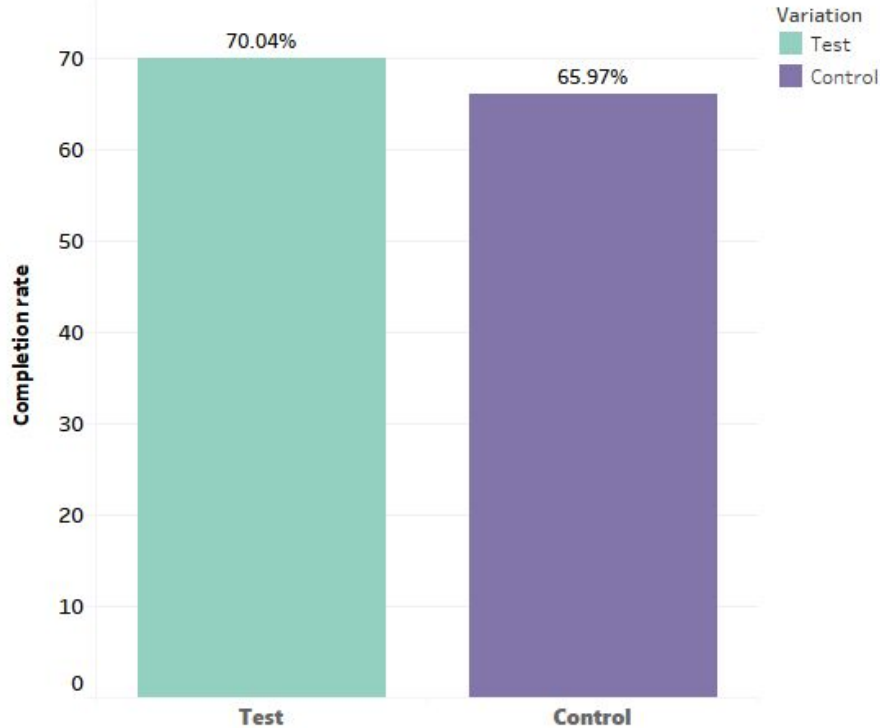
- Completion rate
- Average time spent on each process step
- Average time spent on entire process
- Farthest Step
- Error rate

Completion rate

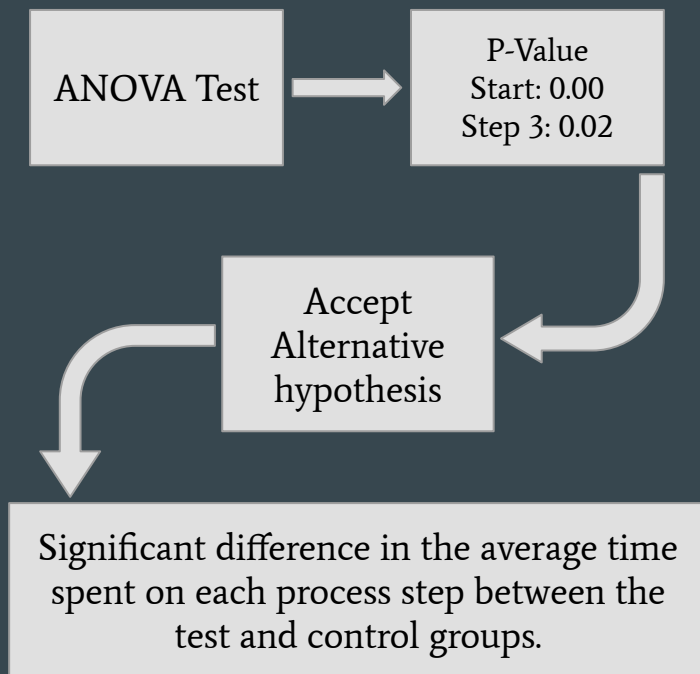
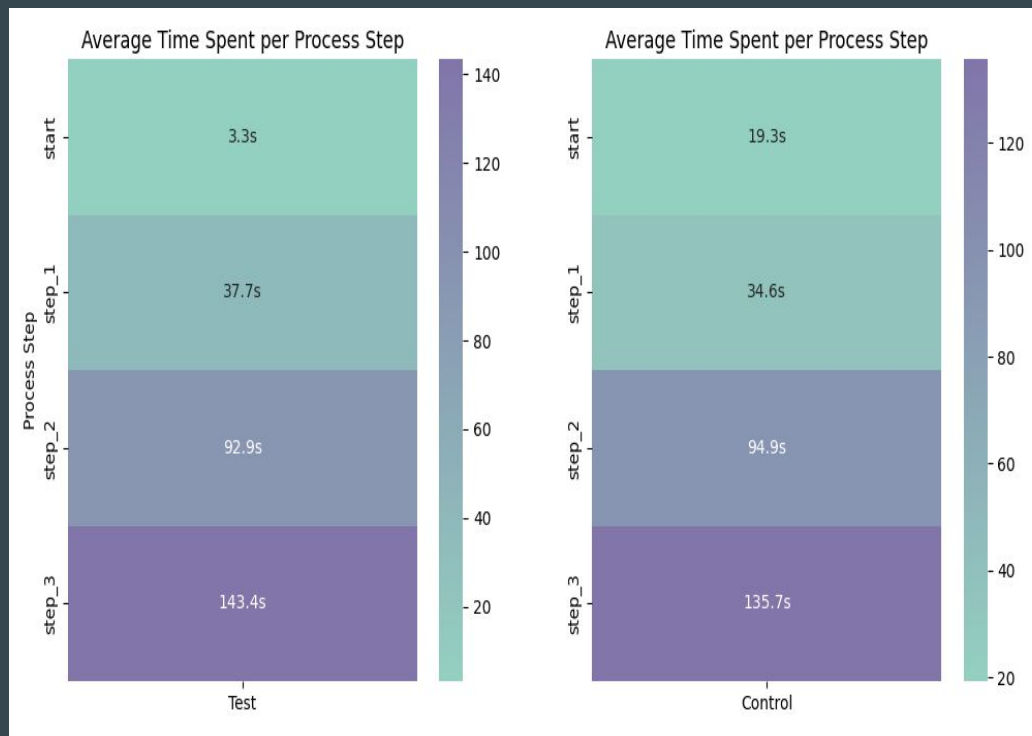


Completion rate

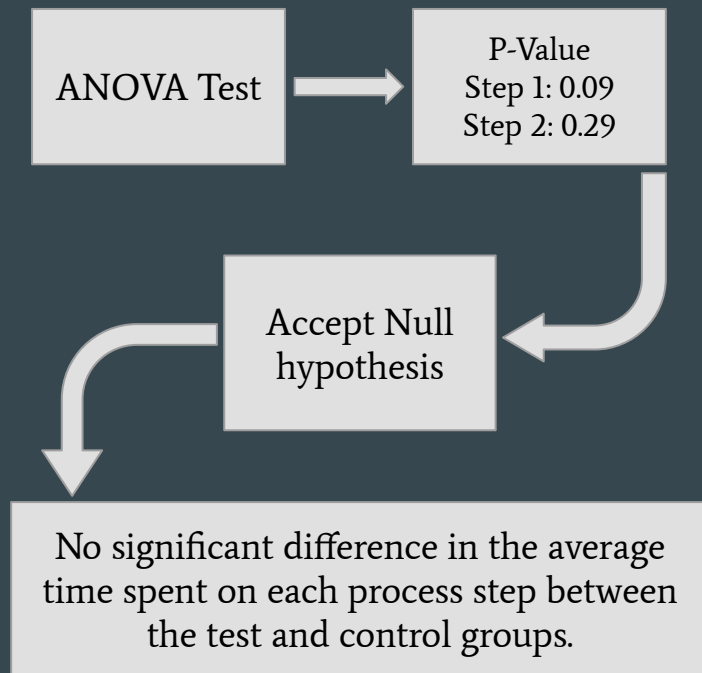
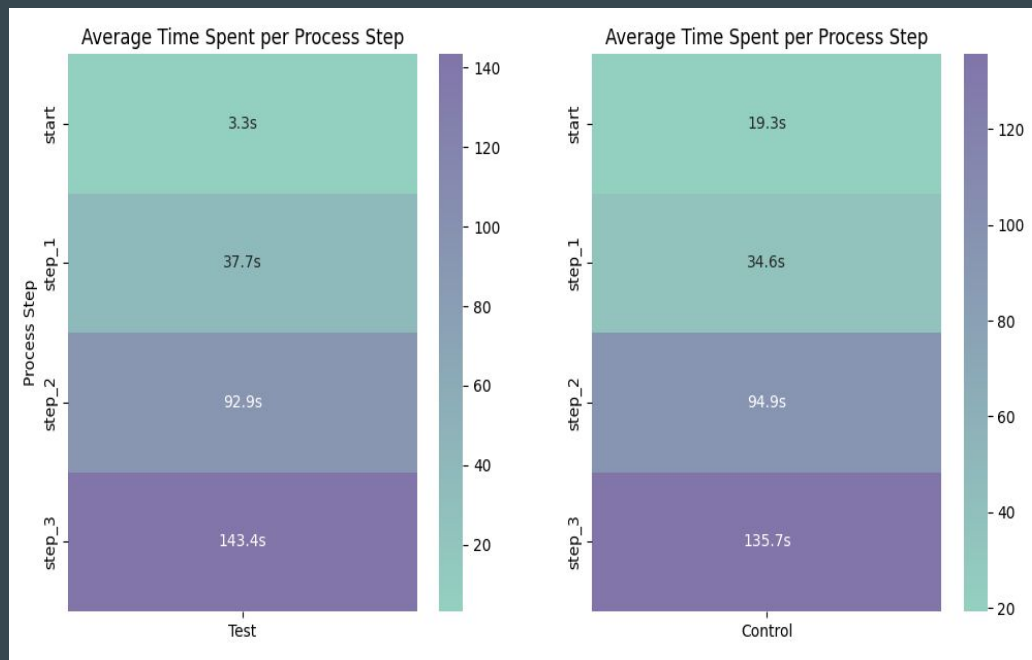
Completion rate for Test and control group



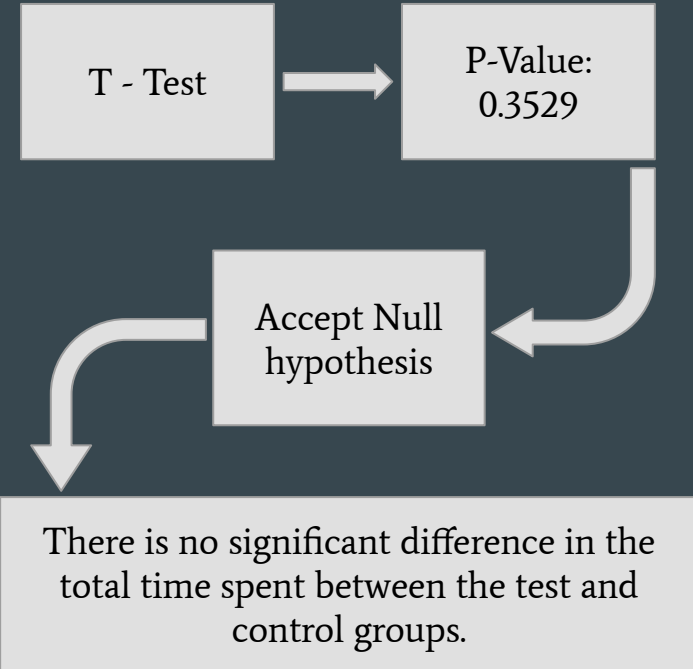
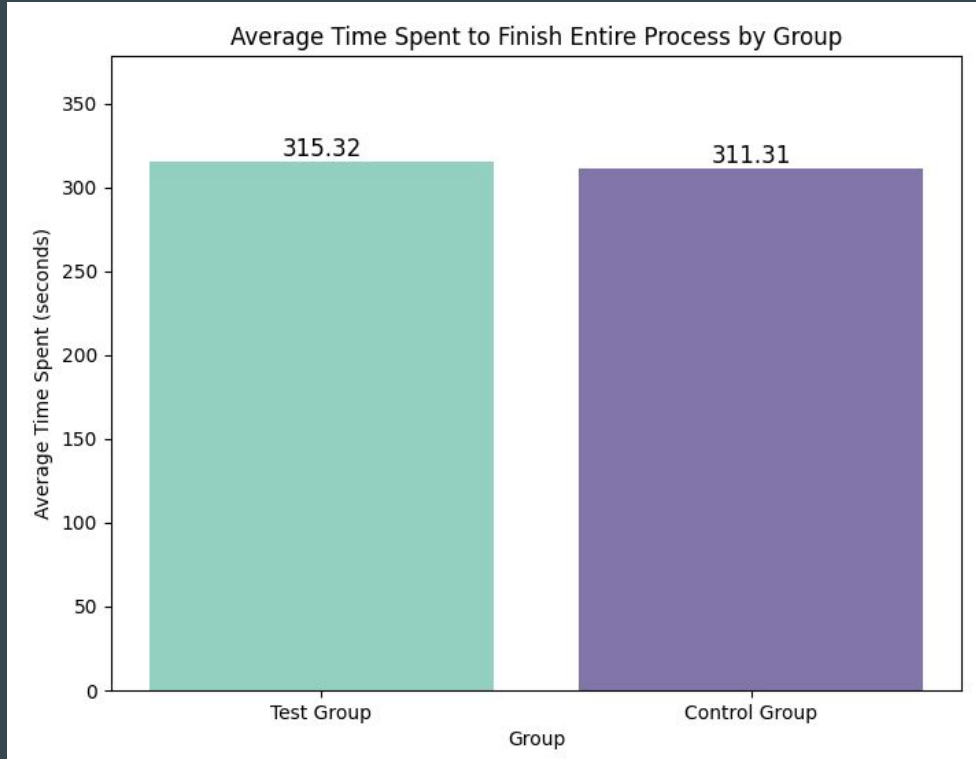
Average time spent on each step



Average time spent on each step

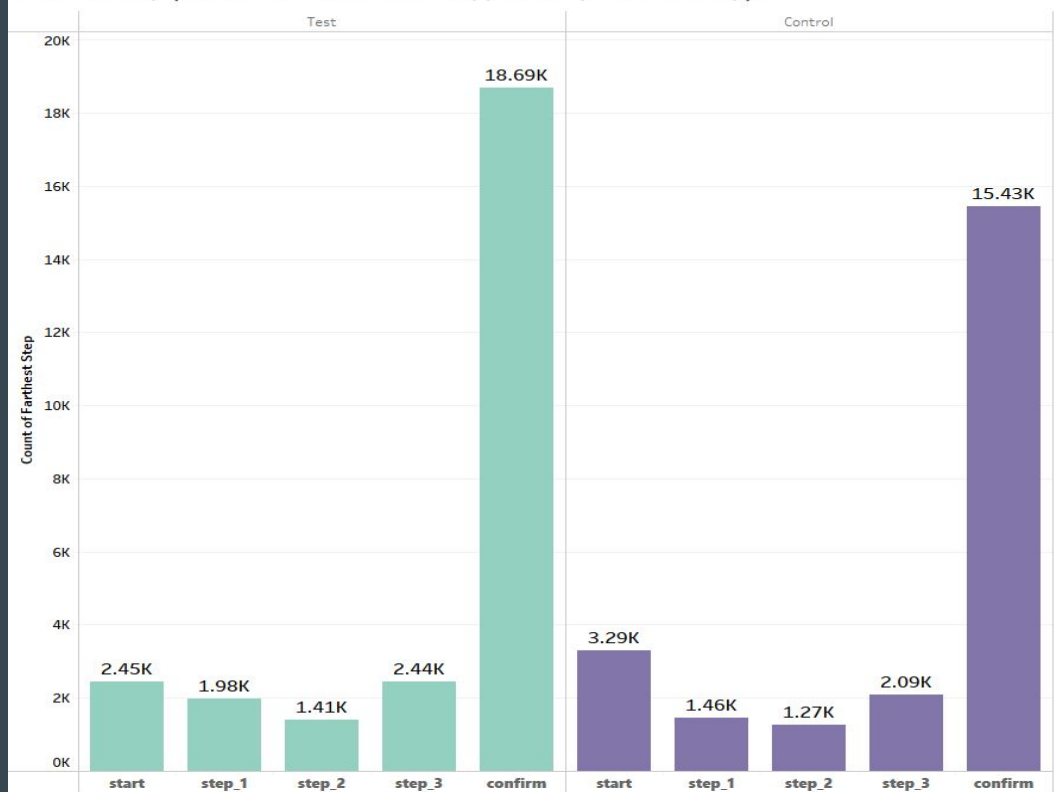


Average time spent on entire process



Farthest Step

Farthest step (Number of clients who stopped at a particular step)



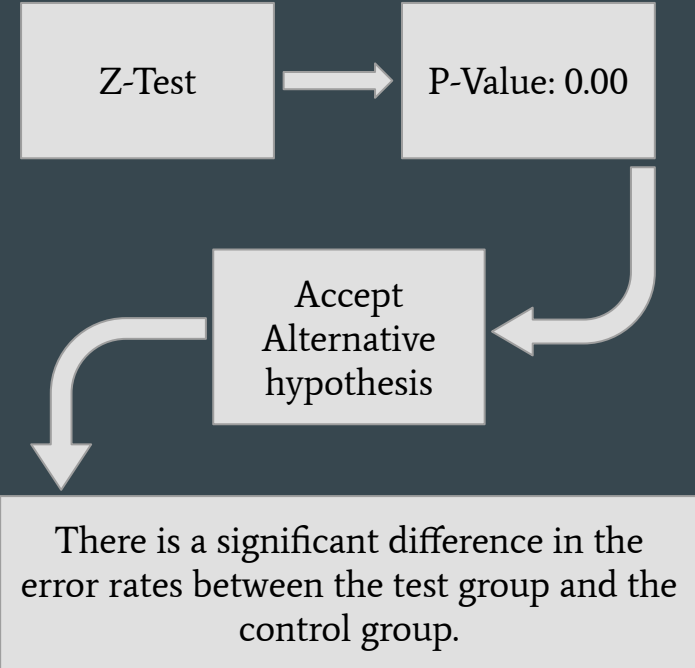
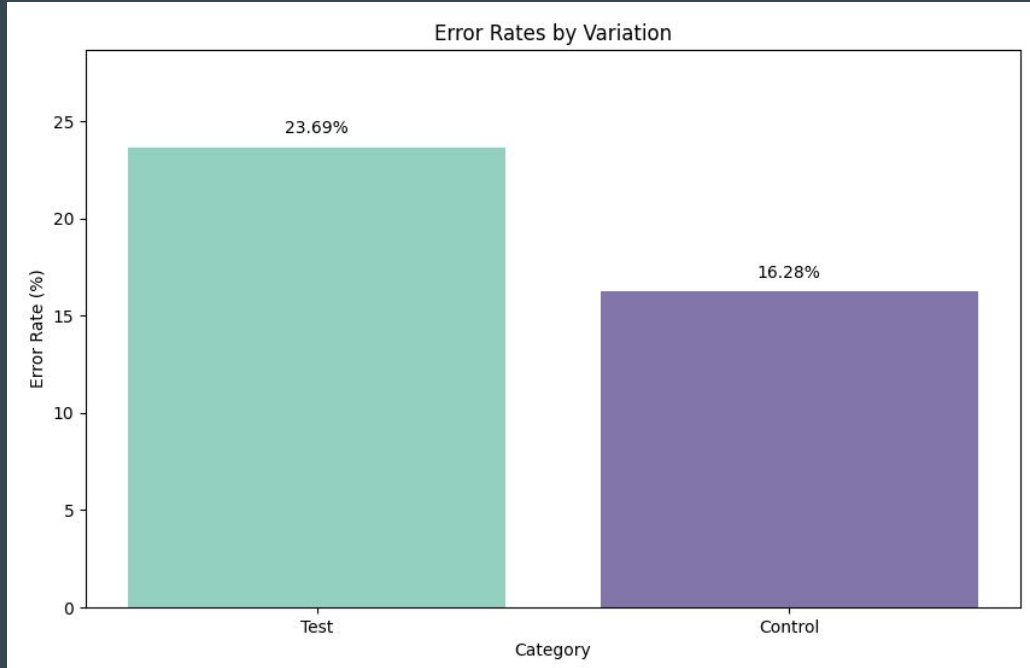
Chi-Square
Test

P-Value: 0.00

Accept
Alternative
hypothesis

The distribution of the farthest step reached by clients is different between the test group and the control group.

Error Rate



Other hypothesis results

- **Average Client Tenure** : The average client tenure of clients engaging with the new process is the same as the average client tenure of clients engaging with the old process.
- **Gender Differences** : There are no significant gender differences in engagement with the new and old processes.

Challenges

A woman with long brown hair in a ponytail, wearing a blue hoodie, is sitting at a desk in a dimly lit office. She is looking intently at a computer monitor and pointing at it with her right hand. The monitor displays a complex data visualization with a circular chart and various data points. The desk is cluttered with papers, a keyboard, and a mouse. In the background, there are shelves filled with books and other office supplies. The overall atmosphere is one of focused work and data analysis.

- Understanding the data set
- Creating calculated fields in Tableau

Conclusions

- New UI has more benefits than the old UI
- Test group clients has better completion percentage
- Improve the process steps 3 in the new UI to have a better completion rate

THANK YOU