Client & Company
InstaFinancials
Company

Sector/Industry
Web application

Scope of work
UX Research, UI Design
Prototyping, Testing

Year
2021

Role
MBA Competencies

How I revamped a B2B website with limited resources, achieving a modern look and improved information architecture ✨🏢

Context

Tortoise (to the Bird) *"Congratulations! Without it everything gets shortened."*

Imagine yourself as a CEO of a early stage B2B startup trying to standout in the crowded fintech market. You have already received a few accolades from your customers as well as from the fraternity. Now planning to jump to the next level with your new ideas and stay ahead of your competitors from every aspect.

As you plan to introduce new and exciting products and features, you struggle to fit them in the website. The website looks a little older, inconsistent and unpolished.

You want to deliver a better user experience to your customers so that they feel confident to make the best business decisions.

Problem statement

Every problem is like a new puzzle- except some of them come with missing pieces and no picture on the box. 🧩

Information architecture
poor information architecture was downgrading the overall usability of the website

Outdated look
older look, inconsistent images and icons were lowering confidence in users regarding the brand

Coding Standard
No well defined coding standards, redundant code was making development slow

My role

"What do you do?" Mostly I'm good at a lot of things, but a master of none-ness.

UI Designer

UX Researcher

Usability Tester

Software Tester

Software Developer

Overview

Not to mention I'm still a Engg. Grad. It makes you believe you understand everything, while falling off the chairs behind the curtain 🤦‍♂️

User Insight
Users primarily find the required information quickly with a better representation.

Challenges
- Prioritization of Ideas
- UX Awareness
- Minimum Resources

Design Principle
Clarity, Usability, Efficiency, were some of the important factors to be considered when you need to represent a large amount of financial data in a meaningful way.

Design Techniques
- Competitor analysis, direct and indirect competitor analysis gives us a better understanding about our position and what can be done better.
- Stakeholder Interviews, Interviews with users and stakeholders helped us to do better prioritization during decision making.
- Relevance and Uniqueness, keeping the design relevant with best practices and trying to be a little unique and innovative benefited us to stay one step ahead from the rest of the competitors.

Root Practices
- Conducted competitor analysis.
- Taking feedback from stakeholders and users.
- Taking inspirations and modifying them as per the need.

Goals

Telling goals is like setting your alarm early- you know it's a good idea, but hitting snooze feels way better in the moment. 😴

Main project metrics

Improve visual design:
1. Create a consistency in design.
2. Bring a modern look and feel to the design.

Improve Usability
1. Improve the information architecture of the website

Challenges Faced

"Challenges are like pop-quizes- underrated at first, but worth the effort if you don't get stuck in a rerun" 😉

Prioritization of Ideas
- Lot of suggestions was making implementation difficult.
- Underpinning the goals made the most from the feedback helps prioritizing must to have items rather than nice to have ones.

UX Awareness
- Missed opportunities to enhance user experience due to lack of awareness about various research techniques.
- Focused more on the direct and indirect competitors to understand better solution.

Research Resources
- Time/Budget constraints, Tools and development plans. Collaborating could have helped overcome.
- Constructed sessions with team members from marketing and operations to work them in the ideation and usability testing process.

Final solution

"A solution is the antidote to a problem, a cure for a sickness, a remedy for a malady, a medicine for a disease, something just satisfactory."

I'm sharing a few glimpses of the website and reflecting on the design choices made. It's been some time since I worked on these projects, but I'll do my best to recall the details. For more information, you can visit www.instafinancials.com. Keep in mind that some things may have changed since I left the organization in 2021.

InstaFinancials / Home page

1. **The Illustration**
The original scene is also of a modern approach to business analytics, incorporating various tools and platforms into one cohesive system for data management, analysis, identification of trends, dashboards, financial analysis, and reporting, ensuring a comprehensive approach to business and financial operations.

2. **Section headings:**
Section headings were divided into three parts, starting with a bold statement, followed by a descriptive sentence and a few section categories or topics, ensuring clarity and guiding the user to the relevant information about the section and tailor a **supporting narrative** to explore more about the topic.

3. **Tabs:**
Tabs organize content into distinct sections, improve space, and facilitate quick navigation, making interfaces more intuitive and user-friendly. They also enhance the ease of the solution without overcrowding the interface.

4. **Solution description:**
Showing a little detailed about the solutions that can help customers.

5. **Helping tools:**
Using the concept of tabs, I tried to create a solution zone/ cases/ tools that are they can take confident decision.
The idea behind designing this section is categorizing valuable information and giving the customers to increase efficiency.

6. **Sold representation:**
Showing the numbers more about financial metrics and the data and not emphasizing the people behind the numbers. Showing the numbers works to show valuable company insights and boosting customers confidence in the customers.

InstaFinancials / Product / Brisk

1. **Secondary Menu:**
Secondary menu focuses on user interest to the current product page. Main menu is kept simple and clean without too all angles. The dedicated secondary menu is better organized.

2. **Background Image:**
The background texture used throughout this page is inspired from tangram design elements, which is the product concept i.e. make your own report.
Reasoning:
The illustration gives an idea about the visual aspect and the concept of the product.

3. **Interactive select boxes:**
Interactive select boxes are mentioned creating an idea about how the product works. Showing a little bit of the product and adding elements like this gives more clarity and ease to the customers before they access it.

4. **Feature representation:**
Representation of features of the website are in highly influenced by the tangram design elements. Each feature is represented in a unique way. Giving a glimpse of what is inside the feature. Which not only creates curiosity but also creates confidence among users.

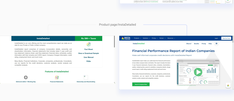
5. **Icons:**
Using geometrical patterns and icons to design page inspired by tangram design. Such icons are used throughout the website. As the same theme and concept creating consistency and flowing throughout the design.

InstaFinancials / Search

1. **Search:**
Search is a crucial element for the travel process- search which is why we aimed to make it more clear and intuitive. Search is a crucial element for the travel process- search which is why we aimed to make it more clear and intuitive.

2. **Tabs:**
Tabs are created for easy navigation and to make the search process easier.

InstaFinancials / Search / Company details page



1. **Top Bar:**
Top bar consists of two section. The topmost one is for company details and specific interactions. The bottom one is for general interactions across all the company pages.

2. **Quick Links:**
Section comprises quick and quick actions that can be accessed from the particular company.

3. **Company data tabs:**
Company data is categorized in the company page displayed across different tabs instead of a long page. Which would be better navigation.

4. **Company master details:**
Company master details are displayed on top of the page data. that can be accessed without any pages to

Comparison

A quick comparison between the **Old** and **New** versions

Old Design

New Design

Home page/Tortoise section with search

Home page/Tortoise section

Product page/InstaFinancial

Company detailed page

Takeaway 💡🧠

"Takeaways are like souvenirs- small but they can hold the most valuable memories." 🎁

Here are my key takeaways:

- While having more resources is always beneficial, when that's not an option, it's wise to leverage whatever tools you can get from cross-functional teammates. You may need to stand up and guess-timate, but something is always better than nothing.
- Learning from the best designs available online is valuable when you have less experience. However, blindly following a design just because it looks good, without understanding the reasoning behind it, can be a risky approach in UX creation.

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