Assignment – Customer Onboarding Journey

Build a complete customer onboarding system that takes a user from 'never invested before' to 'ready to start their wealth journey' in under 10 minutes.

Technical Requirements

- Frontend (React.js):

  - Multi-step onboarding wizard with smooth transitions
  - Form validation with helpful error messages
  - Document upload with preview and validation
  - Risk assessment with interactive UI
  - Investment goal setup with calculators
  - Mobile-first responsive design

- Backend (Node.js + Express):

  - Multi-step form data management
  - File upload handling (documents)
  - Email/SMS OTP verification simulation
  - Risk profiling scoring algorithm
  - Goal calculation engine
  - Session management for save/resume

- Database (PostgreSQL):

  - User profiles and KYC data
  - Document storage references
  - Risk profiles and investment goals
  - Onboarding progress tracking

Core User Journey

1. 1. Welcome & Basic Details – OTP verification, demographics, experience, smooth progress indicators
2. 2. KYC Documentation – PAN, Aadhaar, Bank proof uploads with validation
3. 3. Financial Risk Profiling – Questionnaire, risk scoring, category assignment
4. 4. Investment Goals Setup – Goal selection, SIP calculator, visual timeline
5. 5. Personalized Recommendations – Fund suggestions, allocation, welcome email

Advanced Features

- Auto-save progress (resume later)
- Smart form pre-filling
- Onboarding analytics for drop-off tracking

- Email progress notifications
- Accessibility features (keyboard navigation, screen reader support)

AI Tool Integration

- Use AI for component generation and form logic
- Generate realistic test data with AI
- Create documentation and comments with AI assistance
- Debug complex user flows using AI tools
- Optimize user experience with AI suggestions

Deliverables

- Complete onboarding application with source code
- User journey flowchart showing decision points
- Database design with sample data
- API documentation for each onboarding step
- Test cases covering happy path and edge cases
- Demo video (7-10 minutes) showing complete user journey
- UX decisions document explaining design choices
- AI development log showing tool usage

Sample Data & Scenarios

- 5+ users in different onboarding stages
- Risk profiling questionnaire with Indian investment context
- Popular investment goals templates for Indian families
- 20+ mutual fund schemes across categories
- Realistic validation scenarios and error handling

Technical Focus

- React with Context API for onboarding state
- Multi-step form with React Hook Form
- File upload with progress and validation
- Responsive design for mobile-first experience
- PostgreSQL with proper data modeling
- Clean REST API design
- Indian financial services compliance considerations

What We're Looking For

- Intuitive user experience design
- Clean, maintainable code
- Understanding of Indian investment behavior
- Creative problem-solving
- Effective AI tool utilization

Evaluation

- User experience design (30%)
- Technical implementation (25%)
- Database and API design (20%)
- AI tool effectiveness (15%)
- Documentation quality (10%)