

Synechron

Creating a Single Pane Of Glass **Onboarding Experience**

Case Study

The Challenge

There is a lack of transparency in the client lifecycle for onboarding. There are currently over 20 applications that need tracking and accounting for.

Objective

Shape the look and feel of the future product vision with tested and validated designs based on journey maps. Also ensure a top class delivery of the architectural review and a prioritised backlog, based on the outputs across Experience Design and Technology.



Design Sprint Summary

Synechron led a five-day design sprint with the client team, mapping out the architecture and flows, sketching and voting on designs and producing a first stage prototype for testing. This process delivered fast results, enabling the client team to drive the future vision of the product to their stakeholders.

The team



Design Lead
London



UX Designer
Amsterdam



Frontend Developer
Belfast

Summary of the key activities & outcomes conducted

5

Day design sprint

12

Users interviewed

25+

Screens designed

1

User flow defined and created

2

Weeks testing & iterations

20+

User tests completed

3+

Stakeholder alignment meetings conducted

2

Design artefacts produced (Prototype & digital whiteboard)

Mapping The Long-term Vision

The design sprint kicked-off with journey mapping & HMW voting. This vital step identified the pain points for the users early, and as a collaborative define key requirements and goals for the product.

Example of key learnings

Transparency

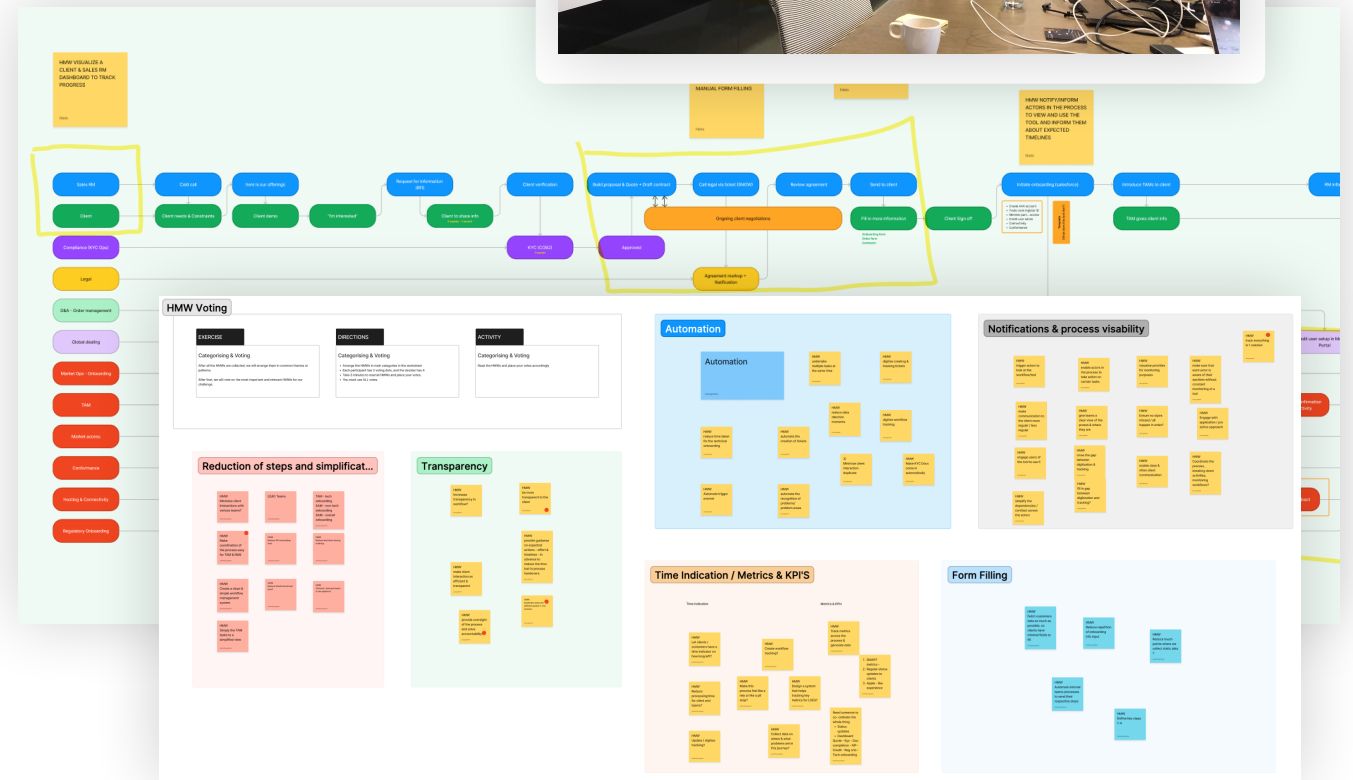
Need transparency throughout the process: where are the issues and what are the issues

Tracking

Need progress tracking throughout the process: which team is doing what and how much time do they need

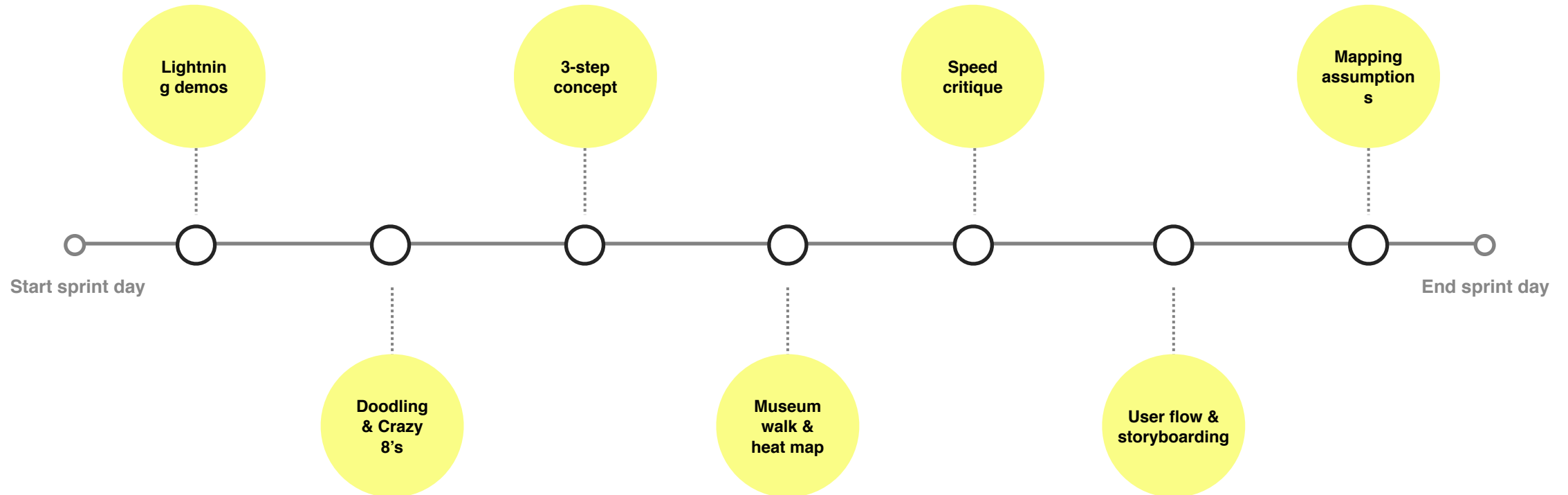
Digitising data collection

Need digitised & automated data collection to collect data from various previous processes and from external sources such as clients or other systems



Utilising UX Methodologies

Ideas and solutions were developed with the client team using a range of methods over the course of a single sprint day. Each method focused on different areas of the journey map, producing an end-to-end blueprint & wireframe of the product.



Testing A Proof Of Concept

Synechron conducted 3 rounds of user testing with 12 users on iterated prototypes. Each sessions learnings were taken to adapt and re-test the designs & journey ensuring the final concept met the goals of both users & the client.

A coded proof of concept was provided to the client alongside the support testing documentation ready for internal stakeholder buy-in.

Round 1

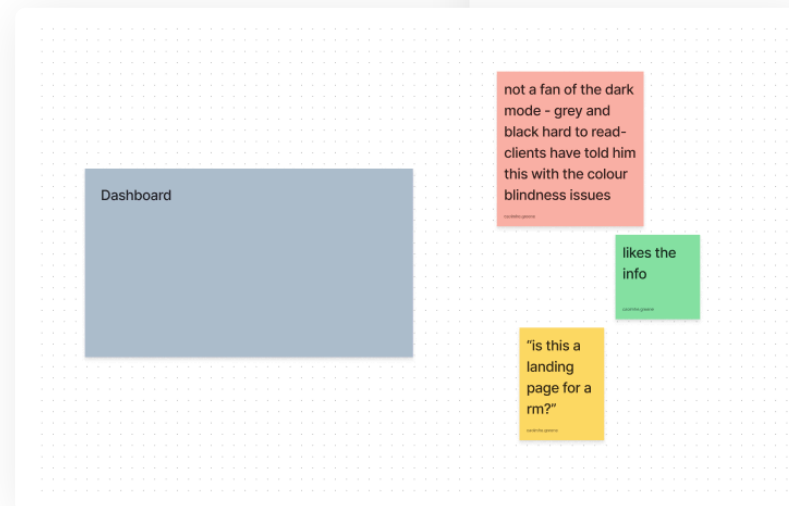
First draft prototype

Round 2




Iterated high fidelity prototype

Round 3


Final proof of concept test & approval

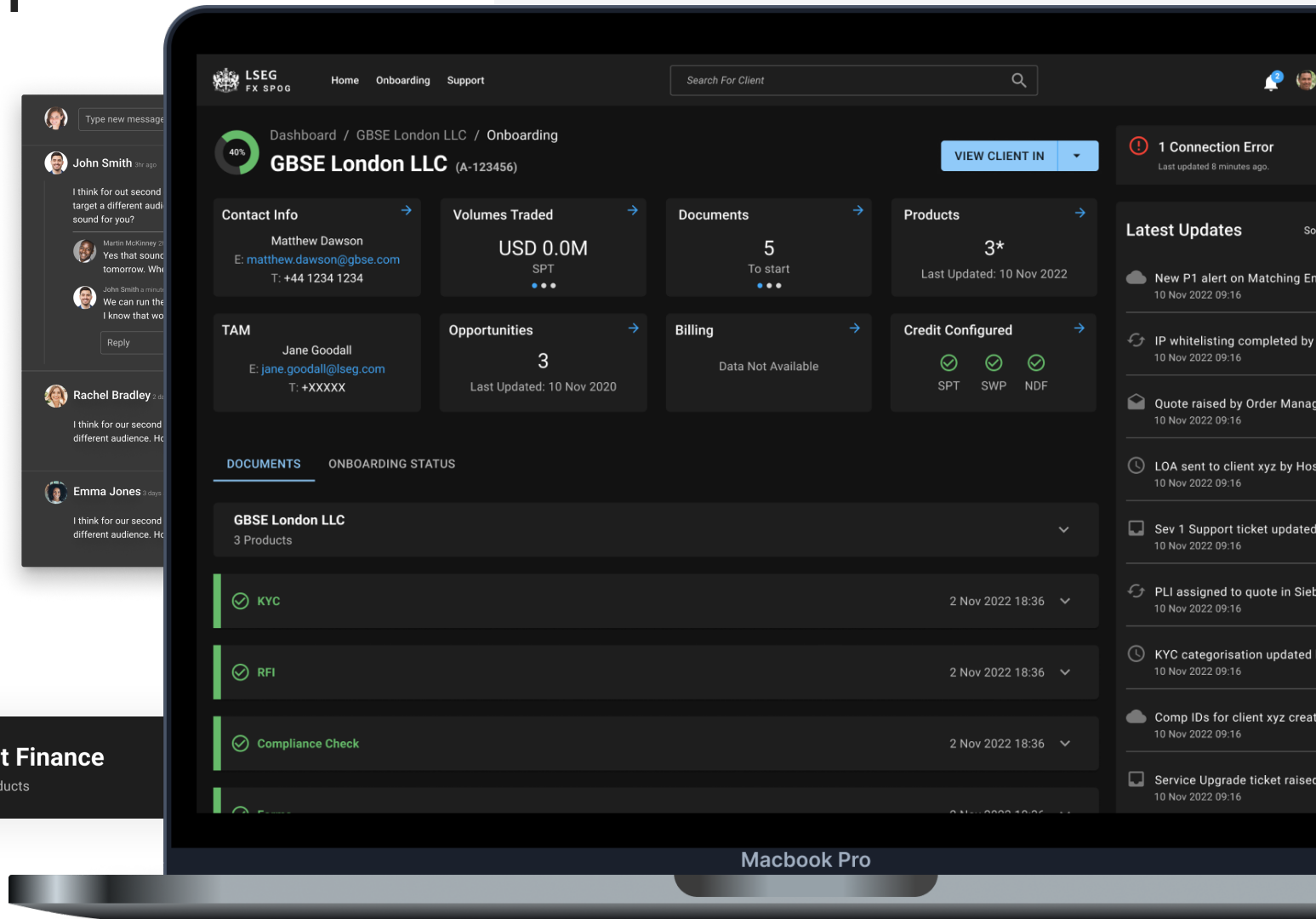


Visualising A Modern Onboarding Portal

-  Live data tracking & updates
-  Document management
-  Multiple user roles & journeys

 [View the prototype](#)

 **Bolt Finance**
3 Products



Synechron



Get in touch.

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