



Client Management System

Business Need

It was key to understand the way front office works and will need to use the system. The application had to be smartly woven around their needs based on key actions. With the focus strictly around prioritizing the primary client information and activity trigger points, we brought in our extreme skills and tried and tested solutions in terms of smart user interface components and easy interactions.

Opportunities / Challenges

A thorough study and analysis of key scenarios of use in a typical front office set up was performed. Hub and spoke architecture was taken up to lay down the information hierarchy and offer respective trigger points. The idea revolved around have the core information placed centrally and specific options to access information and initiate scenario specific tasks from a given hierarchical level of information. The intention was to provide a logical structure which will be easier to perceive and have less load on the user in learning about how the system works.

Our strategy leveraged the smart UI components designed for project with other clients which are already helping the respective users get the best out of system in terms of output and efficiency. User centered design analysis process at Enable it takes into consideration the three most important elements responsible for a successful application and a happy/satisfied user:

1. Thorough understanding of the underlying need,
2. Development environment/capabilities,
3. Simplified interactions & tested smart UI components. High definition wire-framing drove business logic validation and stakeholder feedback, sign offs. Paper prototypes were done for initial usability testing of the concept.

Enableit SOLUTION

1. Single screen design with key client information highlighted at the top for easy context establishment.
2. Dedicated panels to categorize client information based with prioritized information and contextual trigger points at respective hierarchical levels.
3. Used High definition wireframes for speedy decisions during the design finalization process
4. Took up usability testing through paper prototypes at early stages for fine tuning and correcting navigation flows.
5. Application specific graphic design elements defined based on corporate branding and proposed updates based on the new components suggested as part of the design concepts
6. New user interactions proposed to two other applications in the same unit with similar requirements hence saving design time, effort and money.

VALUE OF INVESTMENT

The value of this investment allowed this client to create smart short cuts for advance users and provide Options to view/update information from different hierarchical levels based on a particular task flow a user is in.

1. Highly scalable system with advanced UI components capable of handling double to triple the data currently considered in scope.
2. Work environment taken into consideration for a holistic seamless user experience and enhanced productivity.
3. Views to group information for effortless and quick decision making
4. Well designed mechanism to handle cancellation of tasks anywhere during a given task flow.
5. Well thought out navigation flow facilitating easy exits and capability to save the work in progress.
6. Documented design analysis and presentations available for future references for similar initiatives and education purposes.
7. Full set of design specifications, annotations, html, CSS, icons provided for speedier and well implemented development



TECHNOLOGIES, TOOLS

ASP.Net J Query

Adobe Catalyst, Adobe Photoshop, Adobe Dreamweaver, Adobe Illustrator