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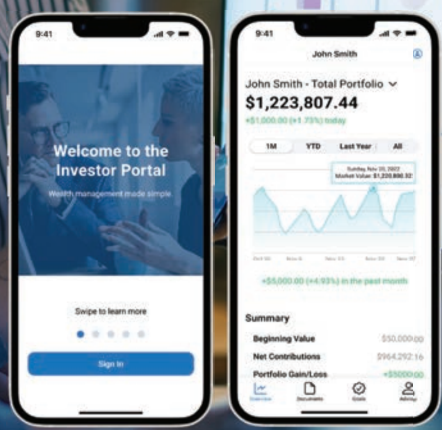
Designing First Mobile App for Advisor Users in 4 weeks for Leading Wealth Management Firm



Key Challenges

- Lack of a unified platform for advisor users to view investor portfolios, and make recommendations
- Absence of personas or user feedback due to no existing app or desktop site data
- Complicated Information Architecture and legacy database constraints caused the lack of context for users

Business Solution

- Thorough research on 10+ competitor apps, Whitepapers, PRs, videos, etc. in the wealth management & financial industries to gain insights & context
- Analyzed the Information Architecture to simplify amount of similar screens, while increasing context for users
- Suggested performance improvements to handle constraints of the client's legacy database

Business Impact

Helped Investor users with simpler visualizations and cleaner data tables

Helped Advisor users by showing a clear client list and an exact copy of what investors see

Enhanced user engagement & accessibility along with clarity within large amounts of data

Simplified multiple screens into one, with added context in 4 weeks

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