Hi, I'm

DHRUV SHARMA



Agenda

My profile

Top projects

Case Study 01 : Leading a design team for a bank’s digital transformation

Case Study 02 : Leading a design team to accelerate digital growth for a cruise company

My references

I am a Human Centred Design leader with 9 years of experience in successfully launching new ventures and re-imagining digital experiences for organisations in industries such as banking, fintech, consumer retail and public sector.

I am a certified design thinking trainer & coach (Singapore Government ALP, HFI & ADP) with experience in building design capabilities & enabling professionals in APAC, Australia & South Africa.

I have worked as hands-on full stack designer, and also lead design teams to deliver products designed at the intersection of user behaviour, big data, viability and feasibility.

VISION FOR MY DESIGN TEAMS

“to build designs, where every pixel has a purpose, driven at the intersection of customer behaviour and big data insights and each element harmonizing to create a seamless, enjoyable, informed & innovative experience for our customers.”

HOW DO I ACHIEVE THAT

ongoing qualitative studies for discovery

every pixel is HCD compliant

cohesive communication aligned to brand

building consistency & reusability

usability testing for every new feature

continuous performance monitoring

cross-functional accountability & ownership

growth experimentation

staying ahead of the curve with trendspotting

Currently, I am actively involved in 3 roles at the Boston Consulting Group, Sydney

CONSULTING (GLOBAL)

I lead design teams to deliver end-to-end design engagements for clients in Banking, Finance & Insurance, Public Sector, and Consumer Retail, helping them reimagine front-to-back (F2B) user/customer/employee journeys, launch new ventures to support business vision, and build effective DesignOps for teams as part of digital transformation initiatives.

I also lead teams to run effective growth experiments, and launch impactful digital marketing campaigns to support clients' digital growth agenda.

L&D (APAC)

I'm involved in up-skilling and mentorship programs at BCG and trained many professionals internally and externally on Design Thinking & HCD topics.

FUNCTIONAL LEADERSHIP (APAC)

I also serve as the OneBCG functional lead for Pride@BCG in Asia Pacific, where I push our diversity agenda, foster affiliation for over 40 members in Asia Pacific, and grow our network of LGBTQIA+ members.

At BCG, I split my time in providing core topic expertise and people & practice management

50% Core Skills	Expertise: User Experience Research	• Can plan, execute and analyze user research in different contexts across the product and service lifecycle • Drives and shares best practices in design research
	Expertise: Evaluative Research	• Can plan, execute and analyze research, usability testing and evaluation of prototypes for products and services • Drives and shares best practices in evaluative research
	Expertise: Methods and Tools	• Familiar with agile and human-centered design methods • Expert with digital tools for research and evaluation • Can run end-to-end usability test in and out of lab • Can plan and facilitate co-creative workshops
	(Creative) Ideas and Insight	• Understands link between design and broader project context • Pushes for and delivers insight; goes beyond the obvious • Define and identify customer value and design strategy.
50% Soft Skills	Value creation	• Leads synthesis/problem framing, pivots in changing environment • Translates user needs, tech and business constraints
	Communication, Presence, and Influence	• Displays leadership presence; viewed as a credible expert • Manages client and team dialog effectively; influences perspectives • Creates concise and effective communication
	Relationship Management	• Gains respect from all levels of client; builds lasting relationships • Understands client organizational dynamics; adapts accordingly • Tackles issues beyond immediate scope
	Project Management	• Ability to lead and manage diverse squads/multi-disciplinary teams • Proactively creates tools and templates others can leverage • Ensures high quality, timely output of all work (own/others) • Strong collaborator; removes blockages and proposes solutions
	People Development	• Generates enthusiasm; draws out the best in people • Available and approachable; drives open dialog with team • Coaches junior team members; provides frequent/timely feedback
	Team Management	• Develops MDAs and aligns on case objectives, scope, working norms with team; • Balances client, project, team and individual personal needs well • Proactively communicates case priorities, ensures team alignment throughout case

As a trainer, I have delivered 50+ training sessions & workshops on HCD topics to professionals worldwide

COUNTRIES

- India
- South Africa
- Hong Kong
- Singapore
- Malaysia
- Thailand
- Australia
- UAE
- Philippines

KEY TOPICS

- Design Thinking 101 (BCG)
- HCD Deep Dive (RISE Singapore)
- Interaction Design for Web & Mobile (HFI)
- Usability Testing (HFI)
- Fundamentals of HCD (HFI)

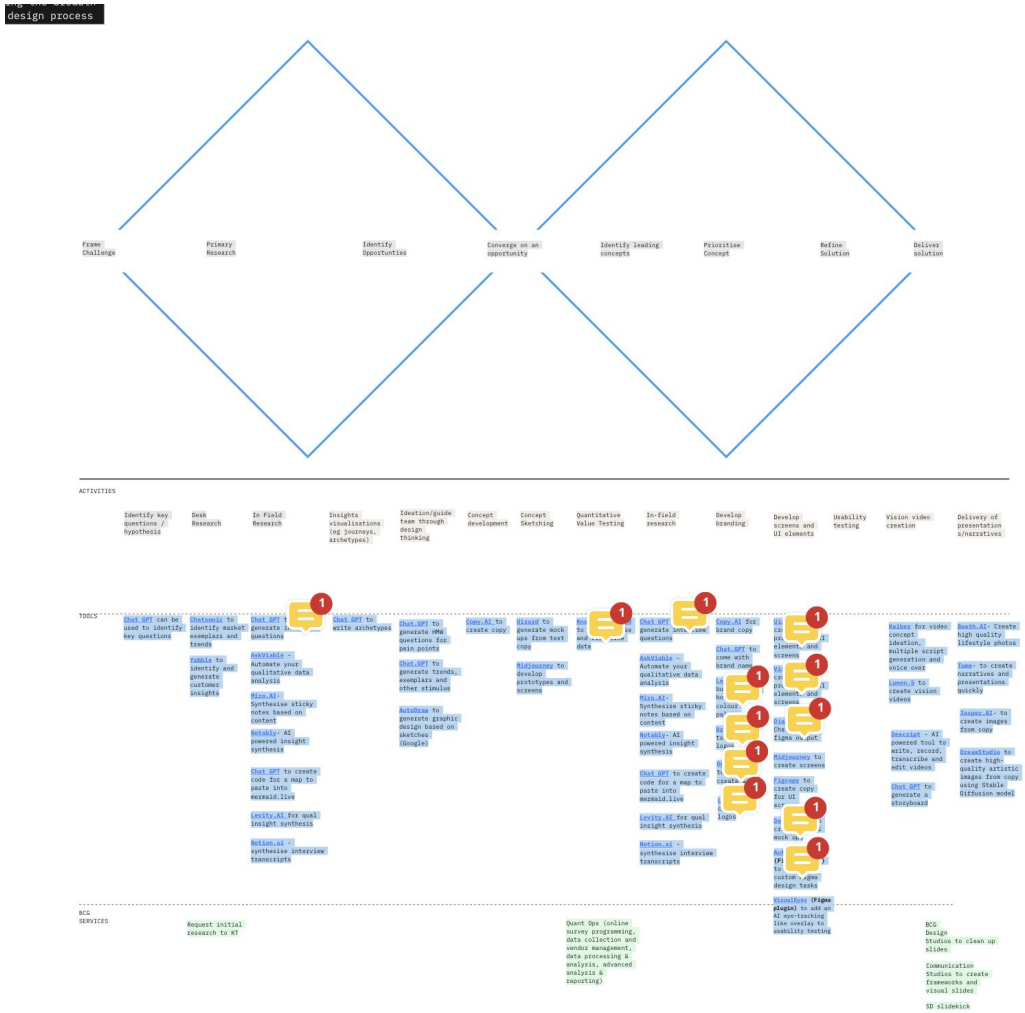
CERTIFICATIONS

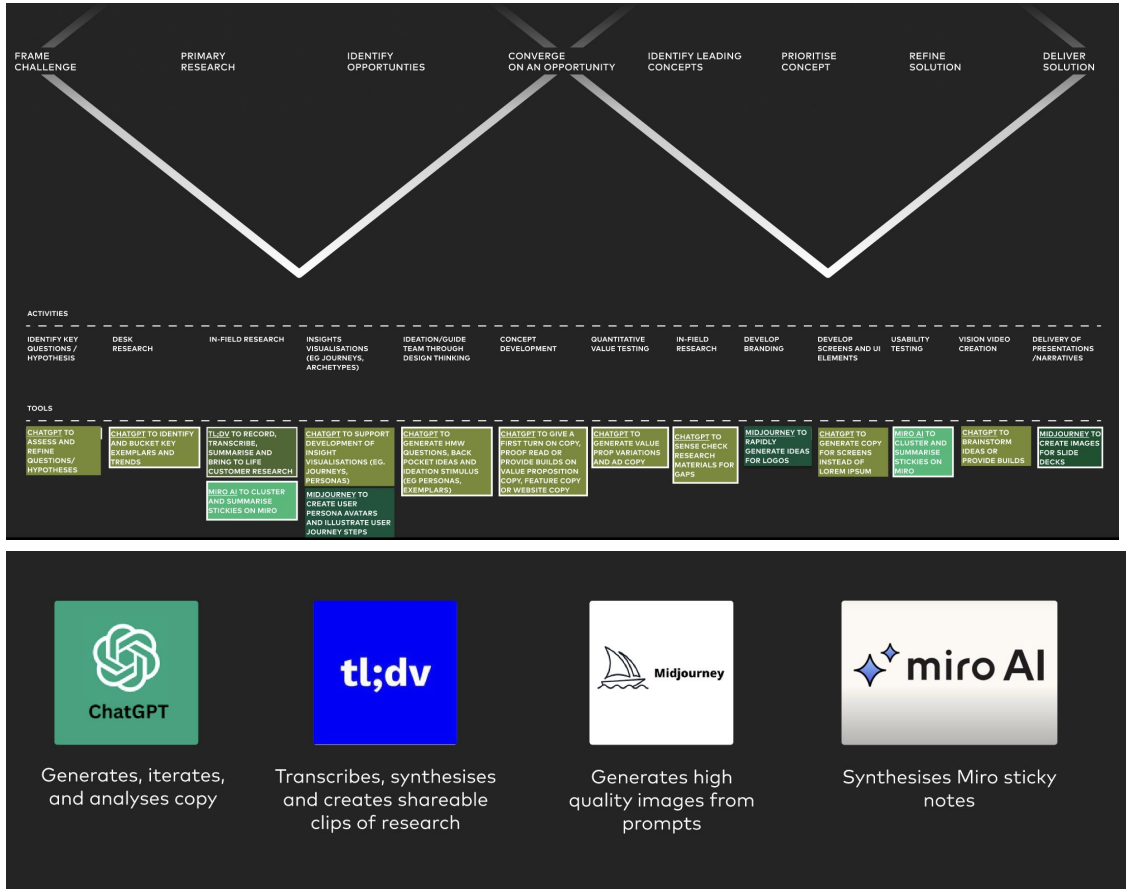
- HFI – CUA Program
- Singapore Adult Learning OSC
- Nielsen Norman Group - UXM



CUA Class at Manulife, Hong Kong, February 2018

Currently wrapping up, GenAI & AI tool mapping across design capabilities for BCG.X teams

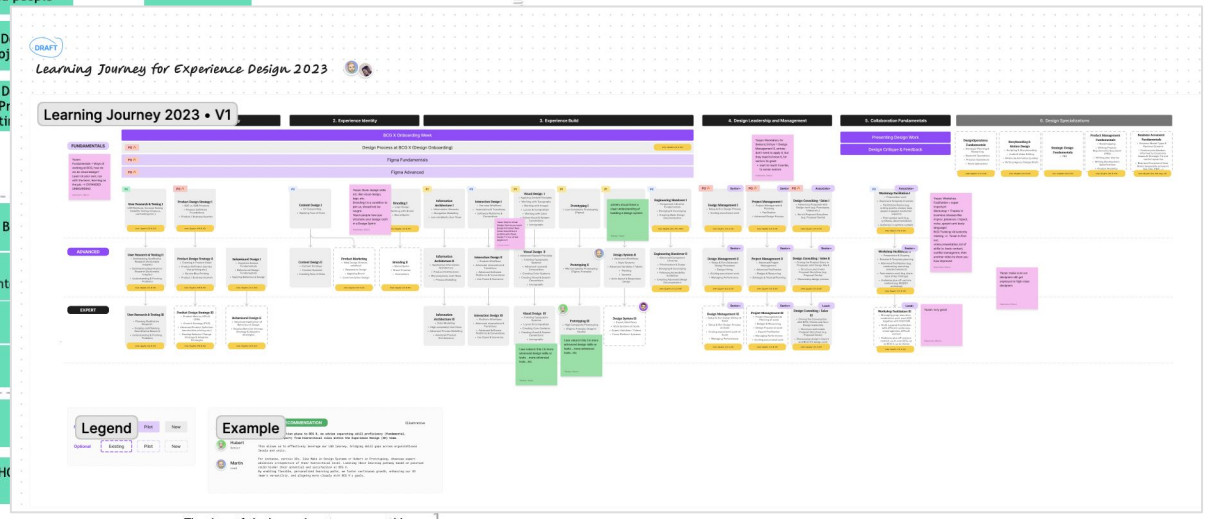




Currently wrapping up, revamped learning journeys for strategic and experience designers

SD Technical Learning Journey | 1st Version

	Deliver critical insights	Design Human Centered Solutions	Future visioning	Design leadership	Specialty / Electives
Onboarding & BCG X Ways of Working	Human Centered Design (HCD) Fundamentals / Certification Tools (digital and non-digital) - Figma, dscout, Usertesting.com, Dovetail, etc. (including BCG X resources) Consent, Privacy, NDAs, Protecting IP, etc. BCG X.Design & X.Ventures Offerings, LOB-specific Methodologies, Ways of Working			Conducting meetings and workshops Stakeholder Management Slidewriting / Storylining/telling Working with BCG Core team	
Fundamentals	Qualitative Research Methods I Market Discovery & Opportunity Analysis Quantitative Research Synthesis - Data analysis, stakeholder mapping, personas etc. Market Trend Analysis Usability Testing Competitor Analysis Measuring Usability End-to-end journey mapping Rapid Concept Testing	Divergent Exploration & Articulation of Opportunities Strategic Concept Development & Articulation Workshop Facilitation Design Critique Design Thinking Opportunity Frameworks	Business & Communi-cations Strategy STEEP Trends Backcasting Business Model Analysis Trend Analysis Futures Thinking Frameworks	Creation & ownership of design process, workstream and people Client Enablement and Best Design Practices	Sketching Service Design Behavioral Design
Intermediate	Qual II: Contextual Inquiry & Field Work Measuring Usability II Qual II: Co-Design Methods	GenAI in HCD GenAI Prompt Design Advanced Ideation Techniques	Information Architecture Strategic Design Brief Development Lean UX & Agile HCD	Tech-build brand strategy Client-Centered Commun-ication	Design Thought Leadership Cross-Impact Analysis Future-Proofing-Strategies Causal Layered Analysis
Expert	Research Ops	Scenario Planning Value Proposition Design	ROI, Business Case, Viability, Prioritization	Sustainable Business Design	



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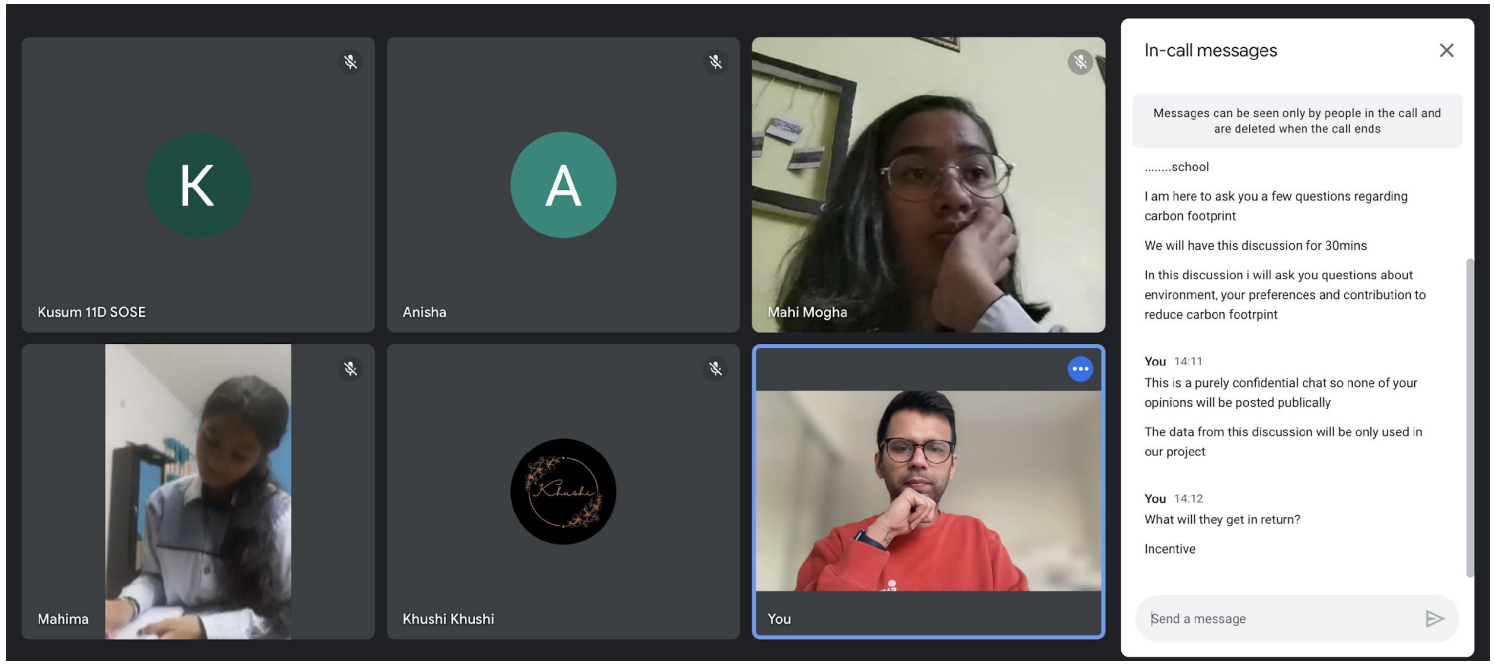
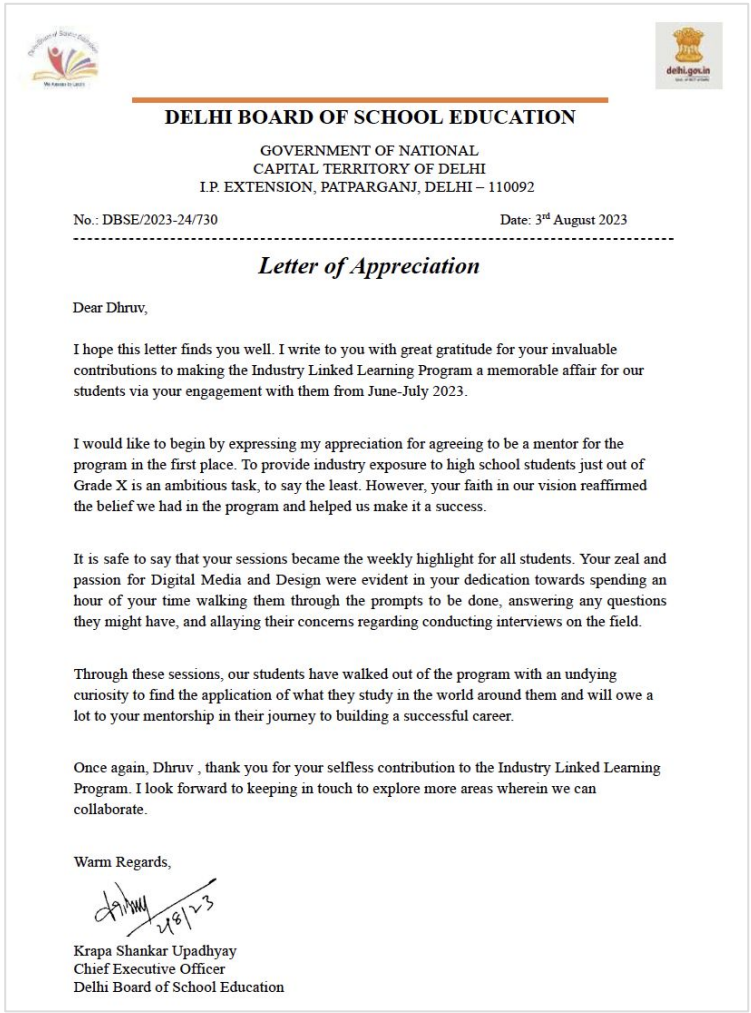
Currently wrapping up, pro-bono digital skills mentorship for underserved school students in India





DELHI BOARD OF SCHOOL EDUCATION

GOVERNMENT OF NATIONAL
CAPITAL TERRITORY OF DELHI
I.P. EXTENSION, PATPARGANJ, DELHI – 110092

No.: DBSE/2023-24/730 Date: 3rd August 2023

Letter of Appreciation

Dear Dhruv,

I hope this letter finds you well. I write to you with great gratitude for your invaluable contributions to making the Industry Linked Learning Program a memorable affair for our students via your engagement with them from June-July 2023.

I would like to begin by expressing my appreciation for agreeing to be a mentor for the program in the first place. To provide industry exposure to high school students just out of Grade X is an ambitious task, to say the least. However, your faith in our vision reaffirmed the belief we had in the program and helped us make it a success.

It is safe to say that your sessions became the weekly highlight for all students. Your zeal and passion for Digital Media and Design were evident in your dedication towards spending an hour of your time walking them through the prompts to be done, answering any questions they might have, and allaying their concerns regarding conducting interviews on the field.

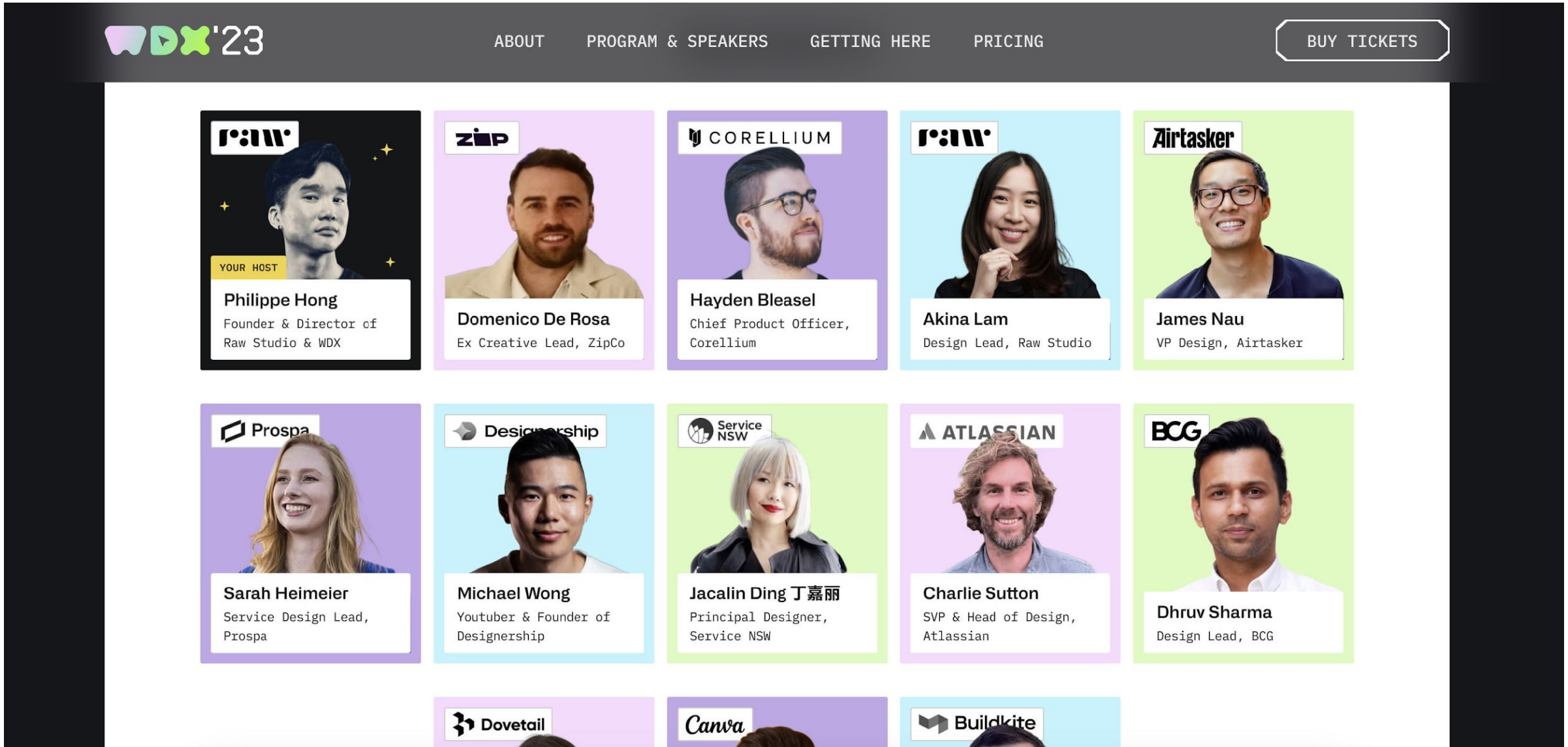
Through these sessions, our students have walked out of the program with an undying curiosity to find the application of what they study in the world around them and will owe a lot to your mentorship in their journey to building a successful career.

Once again, Dhruv , thank you for your selfless contribution to the Industry Linked Learning Program. I look forward to keeping in touch to explore more areas wherein we can collaborate.

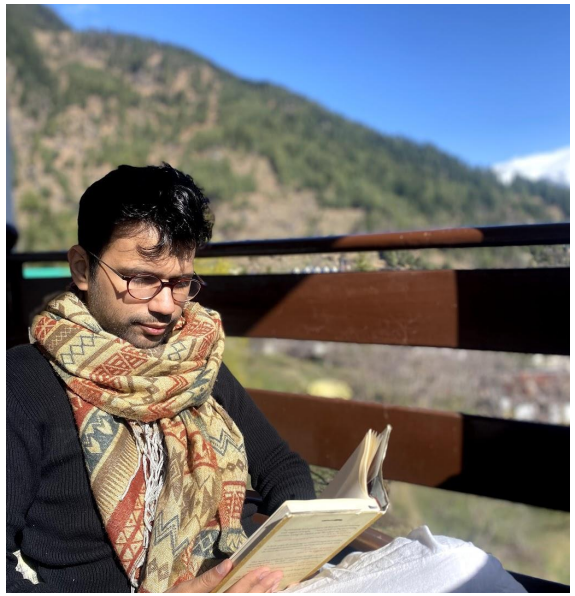
Warm Regards,

Krapa Shankar Upadhyay
Chief Executive Officer
Delhi Board of School Education

Speaking soon at WDX’23 in Design Leadership Panel



In personal life, I grew up in New Delhi, with a love for mountains, enjoyed South African sunsets for a while, & called Australia home in 2021 where I host the annual Diwali parties!



The Himalayas, India



Northcliff, Johannesburg, South Africa



Sydney, Australia

Here’s my professional timeline

2021 - Present | Strategic Design Lead
Boston Consulting Group .
Sydney, Australia

2019-2021 | Strategic Design Lead
Boston Consulting Group .
New Delhi, India

2016-2019 | User Experience Leader
Human Factors International
Mumbai, India

2017-2019 | CUA Trainer
Human Factors International
India, South Africa, Singapore, Hong Kong, Philippines, Thailand & Malaysia

2015 | Head of Design
Voodoo Technologies
New Delhi, India

2014-2015 | User Experience Designer
Times Internet
New Delhi, India

2014 | Software Engineer
Accenture
Hyderabad, India

2022 | Adult Learning Facilitator
OSSC, Institute of Adult Learning
Singapore

2022 | UX Management Certification (UXMC)
Nielsen Norman Group
USA - Global

2018 | Certified Experience Analyst (CXA)
Human Factors International
India - Global

2016 | Certified Usability Analyst (CUA)
Human Factors International
India - Global

2013 | Bachelor of Technology
Manav Rachna University
India

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Projects I'd love to talk about

PUBLIC SECTOR STRATEGY

Led a team of UX & UI designers & product owners to launch a digital solution supporting a broader vision to empower 200,000 educators and 4+ million students in India

Conducted in-depth ethnographic studies and observations to **design an experience enabling 200,000 educators** to effectively conduct competency-based teaching for 4+ million students.

Led a 12-week program to build the mobile app and optimise on-ground operations across the state, enabling a re-imagined teaching and learning experience.

Enabled the design and product teams to utilise growth design frameworks to incrementally **run experiments aimed at driving product adoption & engagement.**

BANKING DIGITAL TRANSFORMATION

Led a team of CX, UX & UI designers for a digital challenger bank serving 7 million customers, overseeing its transformation to become a leading player in India's financial landscape

Devised omni-channel front-to-back (F2B) journeys, optimizing customer acquisition, retention, and engagement, as well as internal employee experience, for 8 key lending and asset products (such as home lending, car loans, 2W loans, mobile banking, AMS etc.)

Led multiple ethnographic research sessions to gain valuable insights into customer needs and pain points, informing strategic decision-making processes.

Successfully **recruited and mentored a team of design professionals,** established strong design frameworks and facilitated trainings to enhance bank's digital design capabilities.

Fostered a collaborative and forward-thinking culture within the organization through thought leadership, **driving design agenda and promote cross-functional teamwork** to deliver exceptional results

RETAIL GROWTH ACCELERATION

Led a team of UX & UI designers & growth specialists, for a leading cruise company, to implement short-term and medium-term growth acceleration initiatives aimed to drive a +50% uplift in bookings

Designed and implemented short-term growth experiments on website and social media campaigns, leading to **+70% increase in website traffic and +40% uplift in bookings/week (Q2 2022)**

Re-designed the end-to-end website experience along with a new design system to integrate new features and scalable modules. Also built a **2-year phased implementation roadmap for website transformation.**

Enabled a significant capability lift for Product & Digital Marketing teams with revised org structure and capability framework.

Diagnosed 4 key enablers to effectively improve Call Centre productivity in a **12 month rapid-action-plan (RAP).**

WORKFORCE UP-SKILLING

Designed and delivered 50+ HCD & Design Thinking trainings globally, to up-skill ICT professionals

Facilitated Design Thinking training for 40+ ICT professionals as a part of Singapore Government's RISE program. Also contributed in designing the curriculum for ICT professionals, in accordance with Singapore's Qualification Framework, enabling them with relevant skills in digital work landscape in Singapore.

Contributed to **design and delivery of Human Factors International's Certified Usability Anaylst (CUA) program** as a Lead Trainer in India, South Africa, Hong Kong, Philippines, Malaysia, Thailand, Singapore.

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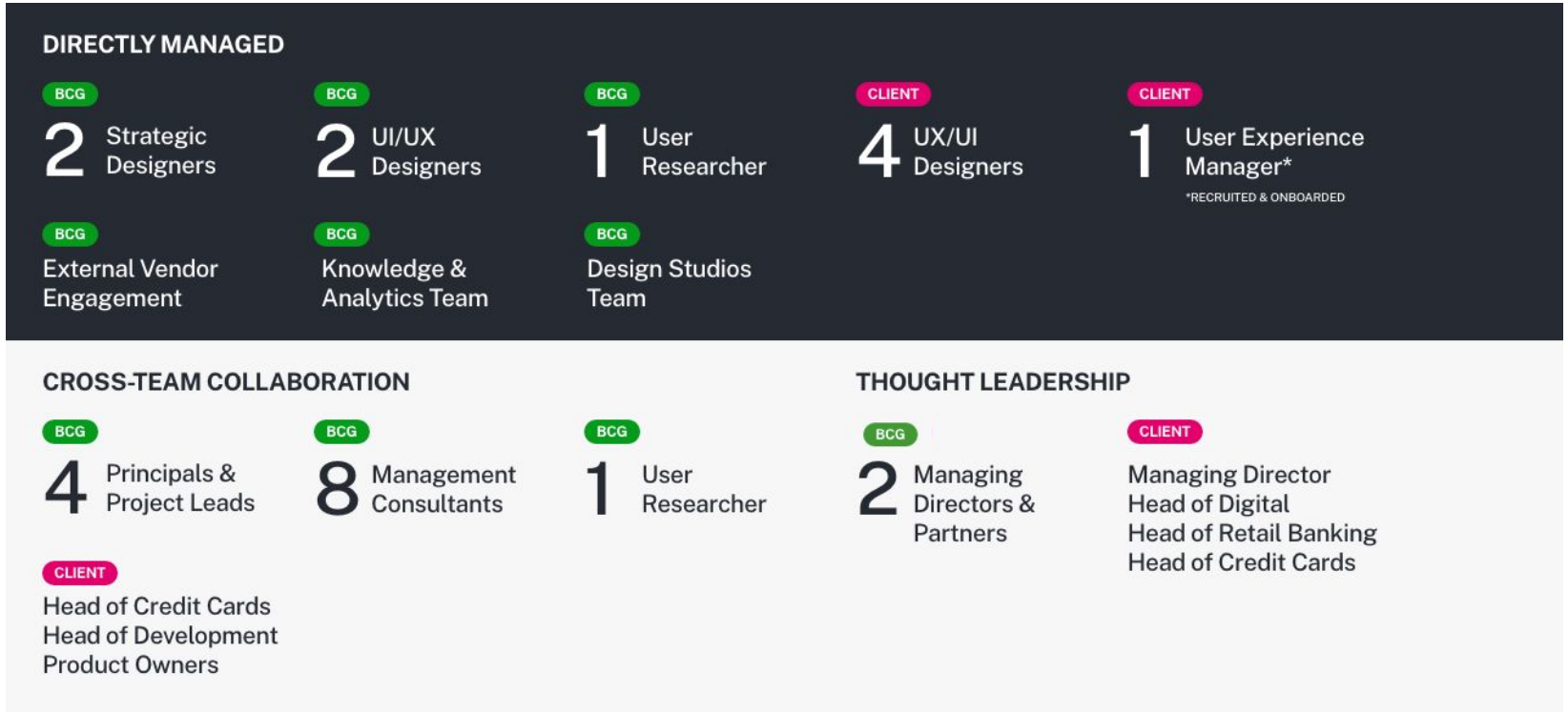
CONTEXT

The client (*'bank' hereafter*) is an emerging player in the Indian financial landscape with more than 7 million customers.

As a part of their digital transformation initiative, the bank engaged BCG to lead the transformation with HCD as a central practice overseeing the transformation across teams.

MY TEAM



Led a team of designers for a digital challenger bank serving 7 million customers, overseeing its transformation to become a leading player in India's financial landscape.

MODULES MANAGED

- Home Lending
- Used Car & 2W Lending
- SME Lending
- NetBank & Mobile App
- Whatsapp Lending
- Personal Lending
- Credit Cards
- Ecosystem Apps
- Wealth Management
- Pre-Login Banking
- Error Handling
- Design System & Ops

FOCUS AREAS

I was appointed **as the head of Central Design Team** supported by 9 designers (BCG, vendor and bank's internal), responsible to drive the following outcomes;

1. Improve the user experience of product journeys to **improve market share of customers and increase productivity for internal bank staff**
2. Provide **thought leadership to innovate** on new features & business streams
3. Co-build & scale **effective designops & capability** within the bank

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FOCUS AREA 1

Improve the user experience of product journeys to improve market share of customers and increase productivity for internal bank staff

APPROACH

1. **Conduct stakeholder workshops to uncover key organisational priorities**
2. Lead rapid experience diagnostic to understand performance for D2C journeys and DSA portals
3. Lead primary research and build service blueprints

To comprehensively understand **organisational & team priorities**, I conducted 1:1 sessions and workshops involving key stakeholders of various products.

This enabled effective alignment of organizational priorities with immediate, medium-term, and long-term goals and relevant action plan required for the Central Design Team.

STAKEHOLDERS

BCG Designers

Head of Lending

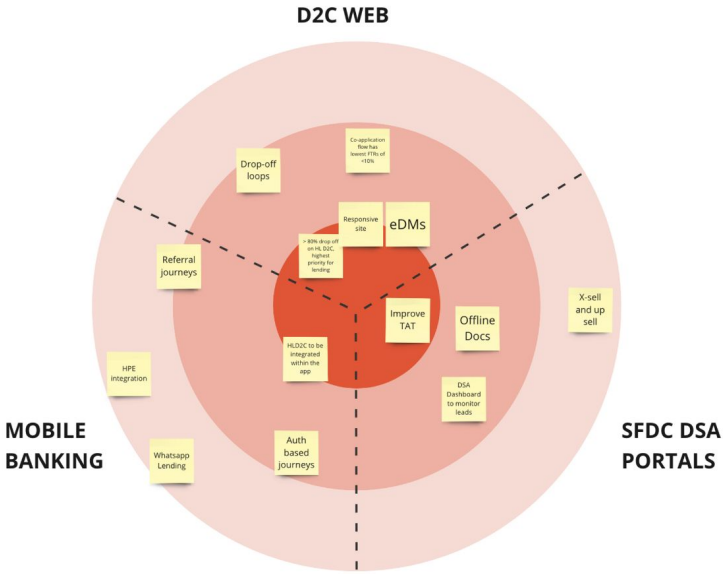
Salesforce Dev Manager

Salesforce Dev Lead

Product Owners



Existing state of user story mapping without prioritisation



Illustrative opportunity map for Home Lending products (sanitised)

FOCUS AREA 1

Improve the user experience of product journeys to improve market share of customers and increase productivity for internal bank staff

APPROACH

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OUTCOME

- I built **opportunity maps** for different products (piloting with home lending) to identify short-term and med-term org priorities
- I **reallocated design efforts** to capitalize on immediate opportunities (UX Squad) while also laying the groundwork for the development of medium-term and long-term prospects (Innovation Squad)
- I enabled the UX Squad with **framework to conduct rapid diagnostics** on D2C journeys and DSA portals
- I enabled the Innovation Squad with **desk research framework** to conduct secondary studies on D2C journeys and identify value pools that require primary research

UX

BCG Experience Designers

Bank UX/UI Designers

BCG Consultant

Dev Partner

Innovation

BCG Strategic Designers

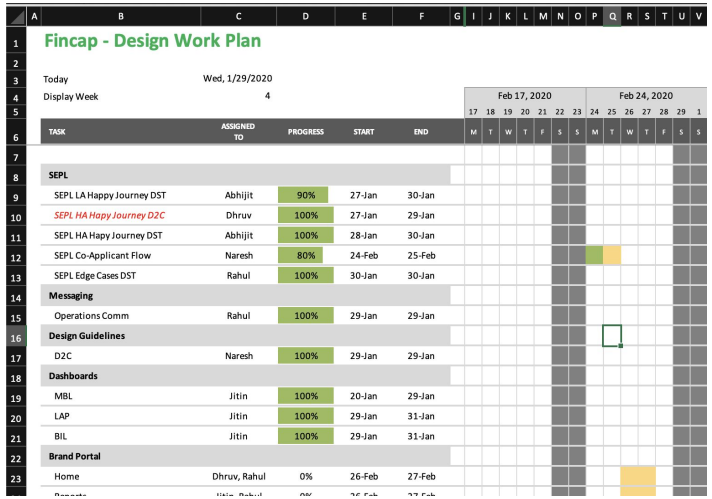
BCG Experience Designers

BCG Knowledge Team Associate

Bank UX/UI Designers

BCG Consultant

Design Squads



Fincap - Design Work Plan

Today: Wed, 1/29/2020

Display Week: 4

TASK	ASSIGNED TO	PROGRESS	START	END
SEPL				
SEPL LA Happy Journey DST	Abhijit	90%	27-Jan	30-Jan
SEPL HA Hapy Journey D2C	Dhruv	100%	27-Jan	29-Jan
SEPL HA Hapy Journey DST	Abhijit	100%	28-Jan	30-Jan
SEPL Co-Applicant Flow	Naresh	80%	24-Feb	25-Feb
SEPL Edge Cases DST	Rahul	100%	30-Jan	30-Jan
Messaging				
Operations Comm	Rahul	100%	29-Jan	29-Jan
Design Guidelines				
D2C	Naresh	100%	29-Jan	29-Jan
Dashboards				
MBL	Jitin	100%	20-Jan	29-Jan
LAP	Jitin	100%	29-Jan	31-Jan
BIL	Jitin	100%	29-Jan	31-Jan
Brand Portal				
Home	Dhruv, Rahul	0%	26-Feb	27-Feb

Squad Workplan

FOCUS AREA 1

Improve the user experience of product journeys to improve market share of customers and increase productivity for internal bank staff

APPROACH

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3. Lead primary research and build service blueprints

To uplift usability of prioritised journeys and products, I enabled the team with a ***diagnostic framework***, to evaluate and identify opportunities of UX improvements. In addition to fresh diagnostic, the team also reviewed the existing knowledge available with the bank based on customer listening and staff audits.

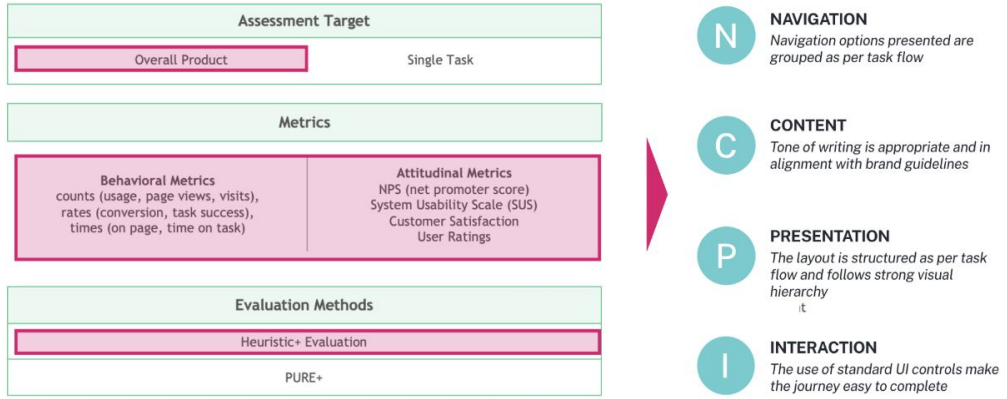
UX

BCG Experience Designers

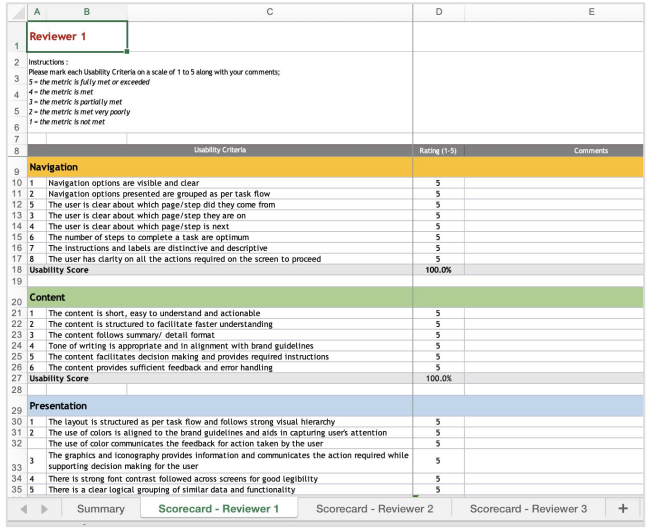
Bank UX/UI Designers

BCG Consultant

Dev Partner



Illustrative : Usability Assessment NCPI Framework



Reviewer 1

Instructions :
Please mark each Usability Criteria on a scale of 1 to 5 along with your comments;
5 = the metric is fully met or exceeded
4 = the metric is met
3 = the metric is partially met
2 = the metric is met very poorly
1 = the metric is not met

	Usability Criteria	Rating (1-5)	Comments
	Navigation		
1	Navigation options are visible and clear	5	
2	Navigation options presented are grouped as per task flow	5	
5	The user is clear about which page/step did they come from	5	
3	The user is clear about which page/step they are on	5	
4	The user is clear about which page/step is next	5	
6	The number of steps to complete a task are optimum	5	
7	The instructions and labels are distinctive and descriptive	5	
8	The user has clarity on all the actions required on the screen to proceed	5	
	Usability Score	100.0%	
	Content		
1	The content is short, easy to understand and actionable	5	
2	The content is structured to facilitate faster understanding	5	
3	The content follows summary/ detail format	5	
4	Tone of writing is appropriate and in alignment with brand guidelines	5	
5	The content facilitates decision making and provides required instructions	5	
6	The content provides sufficient feedback and error handling	5	
	Usability Score	100.0%	
	Presentation		
1	The layout is structured as per task flow and follows strong visual hierarchy	5	
2	The use of colors is aligned to the brand guidelines and aids in capturing user's attention	5	
	The use of color communicates the feedback for action taken by the user	5	
3	The graphics and iconography provides information and communicates the action required while supporting decision making for the user	5	
4	There is strong font contrast followed across screens for good legibility	5	
5	There is a clear logical grouping of similar data and functionality	5	

Summary | Scorecard - Reviewer 1 | Scorecard - Reviewer 2 | Scorecard - Reviewer 3

Heuristic Scorecard Sheets

FOCUS AREA 1

Improve the user experience of product journeys to improve market share of customers and increase productivity for internal bank staff

APPROACH

1. Conduct stakeholder workshops to uncover key organisational priorities
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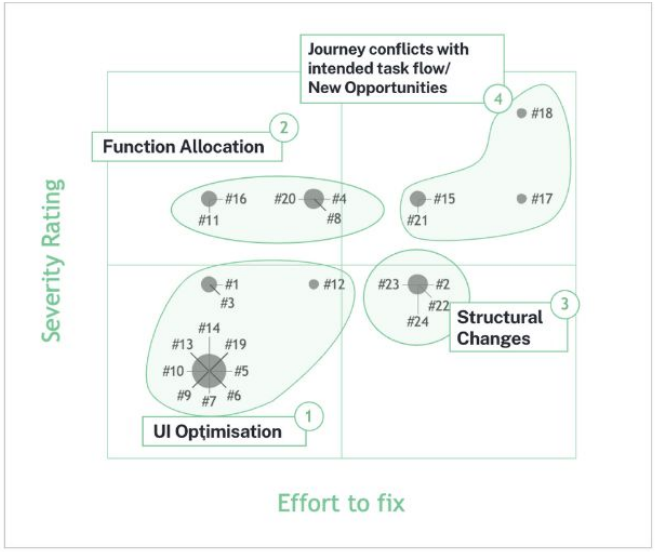
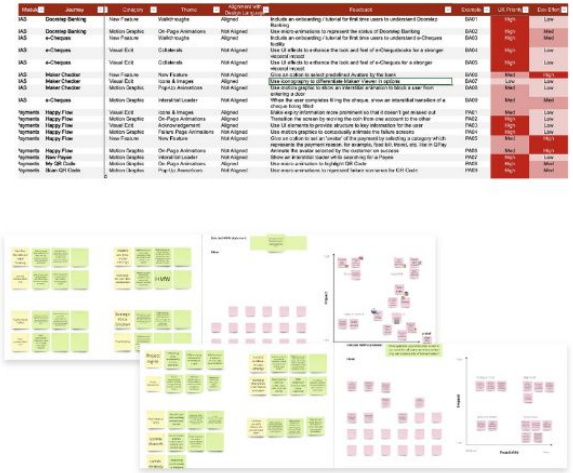
OUTCOME

- The heuristic scorecards & diagnostic framework enabled a **quick synthesis of improvement opportunities** by the UX squad. Following prioritisation workshops, I enabled the UX squad with a workplan to implement these changes across 4 key areas, along with **relevant examples from industry, lo-fi prototypes, design guidelines etc.**
- In the first few sprints, the teams were able to observe an improved FTRs on DSA journeys, enabling them to implement similar changes to other products, *e.g. HL pre-approved swim-lane reached FTR of 68%*

Identified 4 key areas of improvement across products & journeys...



... and led affinity workshops to prioritise across product squads.



Illustrative : UX Audit Map, Use-case tracker and MIRO boards from affinity workshops to prioritise

FOCUS AREA 1

Improve the user experience of product journeys to improve market share of customers and increase productivity for internal bank staff

APPROACH

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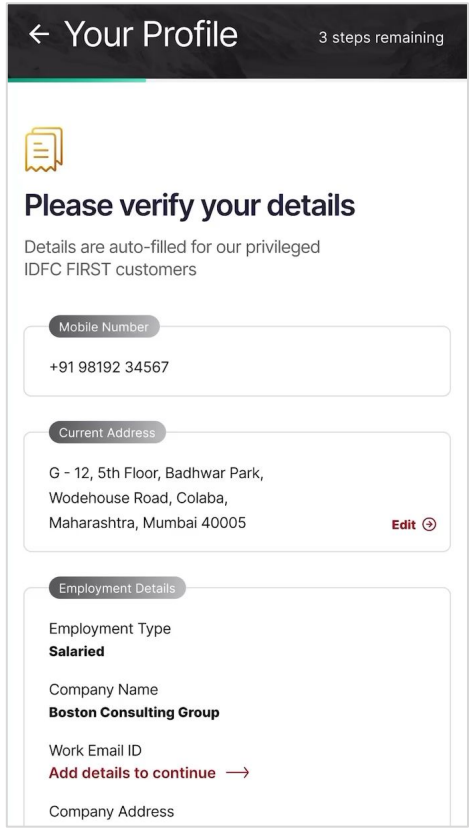
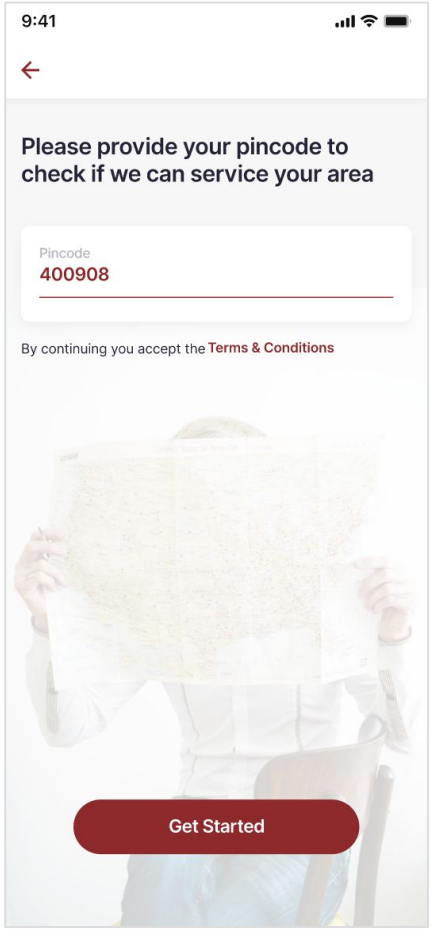
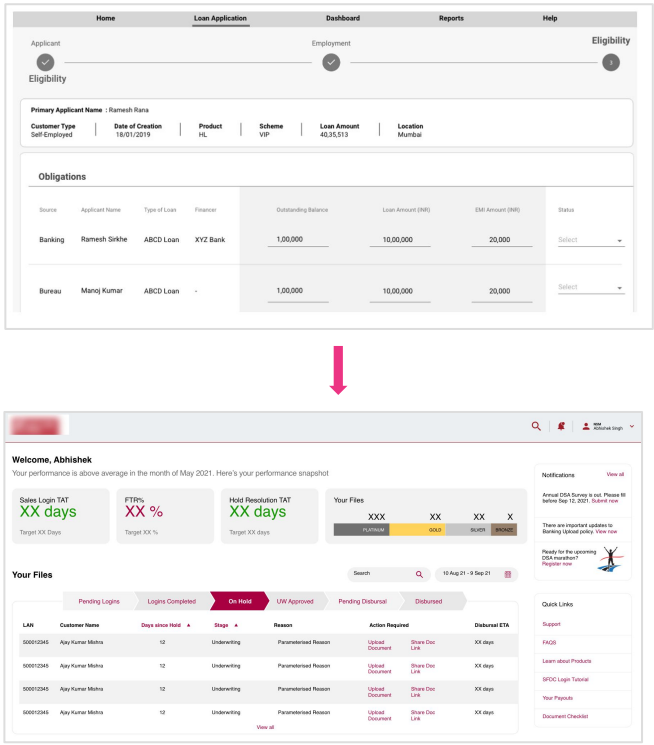
EXAMPLES OF RAPID UX DIAGNOSTIC & IMPROVEMENTS



1-click resume of D2C journeys using magic links



Service check integrated before beginning D2C journeys



Improved layouts for DSA dashboards with persistent navigation

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APPROACH

1. Conduct stakeholder workshops to uncover key organisational priorities
2. Lead rapid experience diagnostic to understand performance for D2C journeys and DSA portals
3. **Lead primary research and build service blueprints**

I led the team to conduct in-depth research to identify gaps in experience and build a view on **what good looks like**. We piloted this with the *Home Lending and Credit Cards* journey to identify big value pools across the journey, and **build an end-to-end service blueprint that serves as a north-star for other products**.

I enabled the team with **research guides, RCA sheets, & other tools to effectively conduct in-depth studies** without having to re-engineer the wheel and moderated first set of sessions.

Innovation

BCG Strategic Designers

BCG Experience Designers

BCG Knowledge Team Associate

Bank UX/UI Designers

BCG Consultant

Category	Activity	Priority: CRITICAL 4 0	IMPACTFUL 6 0	GOOD-TO-HAVE 8 0	TRASH 12 0
Summary Snapshot	View a summary snapshot for business performance, BAU activities and requests	☐	☐	☐	☐
	View updates on IDFC FIRST Bank business practices, customer journeys and other milestones	☐	☐	☐	☐
Business Reports	Download subvention and sales reports (MIS) with customizable time horizon as well as information	☐	☐	☐	☐
	View business, customer and salespoint performance dashboards with effective business insights	☐	☐	☐	☐
	View industry intelligence on best performing schemes across asset categories	☐	☐	☐	☐
	View monthly payment summary with ageing details	☐	☐	☐	☐
	Self-Serve Feature : Authorize / Deauthorize/ Create New Sales Points	☐	☐	☐	☐

Activity	Menu Option	Other (if selected)
Create MIS report	Reports (Dashboard / MIS Reports / Popular Schemes / Payment Summary)	
Activate a new sales point	Reports (Dashboard / MIS Reports / Popular Schemes / Payment Summary)	
Deactivate an existing sales point	Home	
Activate a new scheme	Activations (Scheme / Sales Points / Models)	
Edit an existing scheme	Reconciliations	
Change password	Requests	
View popular schemes	Profile	
Request special scheme	Other	
Raise reconciliationquery	Reconciliations	
View subvention report	Reports (Dashboard / MIS Reports / Popular Schemes / Payment Summary)	
Deactivate sales point	Activations (Scheme / Sales Points / Models)	
Add team member	Requests	
View business insights	Home	
Request No Dues certificate	Requests	
View payments summary	Other	

Using Google Sheets to run rapid RCA to test Information Architecture and Affinity Mapping for feature set prioritisation

10 Minutes

4 Icebreaker & Ecosystem Context

4.1 Introduction

1. Could you please tell me about yourself and your work?

   [Intent: Understand the ecosystem and social context of the user]

2. Tell us little about your fleet? How do you manage it?

   [Intent: Understand the business constraints of the user]

   Probes
   - *How many trucks do you have?*
   - *What are the common regions travelled?*
   - *Short Haul v/s Long Haul?*
   - *Fleet Operations*

3. Can you tell me about the last purchase you made for your Fleet Service?

   [Intent: Understand the drivers, emotions and blockers of purchase decisions]

   Probes:
   - What kind of item & purchase?
     TBB/ TBR/ Replacement purchase/ Claim, etc.
   - Where did you buy? Why?
   - Why did you buy it?
     Quality, brand, service, price, referral, etc.

4.2 Freelisting Communication Channels

Can you please pick the items you use on a daily basis and arrange them in the order of time you spend the most to least?

[Intent: Understand the communication channels in the user's ecosystem]



Illustrative : Protocol for research

FOCUS AREA 1

Improve the user experience of product journeys to improve market share of customers and increase productivity for internal bank staff

APPROACH

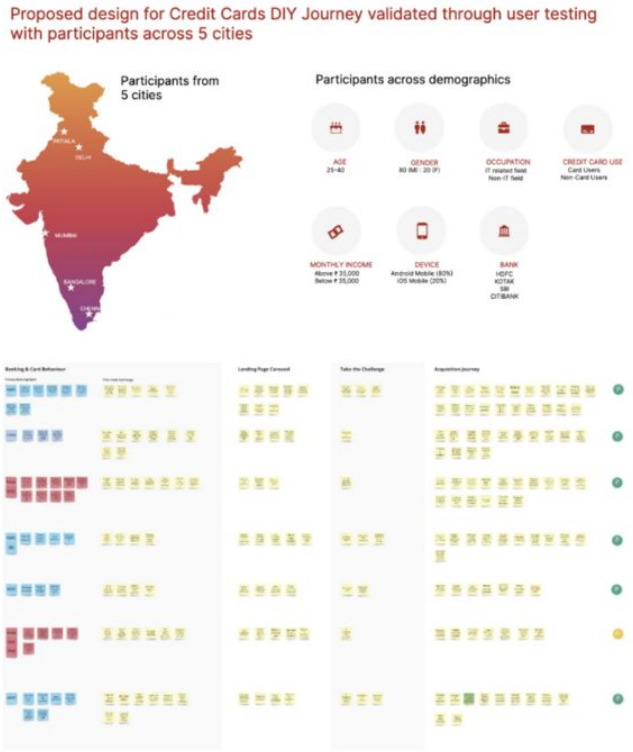
1. Conduct stakeholder workshops to uncover key organisational priorities
2. Lead rapid experience diagnostic to understand performance for D2C journeys and DSA portals
3. **Lead primary research and build service blueprints**

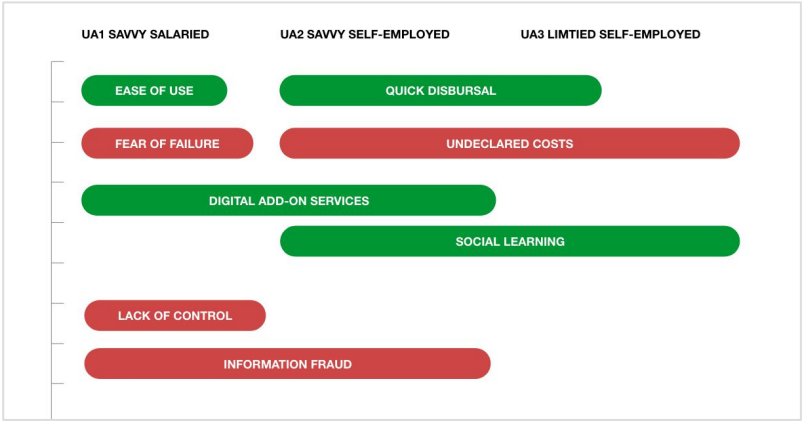
I **moderated first sets of research sessions** to kick-start the team and make sure we are capturing the right drivers & experience gaps.

I also supported the team to build **emotional schemas** for D2C journeys so we can integrate the right set of drivers through the customer journey.

Innovation

- BCG Strategic Designers
- BCG Experience Designers
- BCG Knowledge Team Associate
- Bank UX/UI Designers
- BCG Consultant





Emotional Schemas from HL D2C ethnographic research



Credit Cards DIY Journey Research Sessions across 5 cities in India

FOCUS AREA 1

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To build the revamped customer journeys I **co-facilitated journey mapping workshops with innovation squad,** specifically to integrate persuasion hooks across the screen flow of D2C journeys.

As the next step, I worked closely with the Experience Designers to build out end-to-end low fidelity wireframes (of key flows) to be designed and validated.

Innovation

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BCG Experience Designers

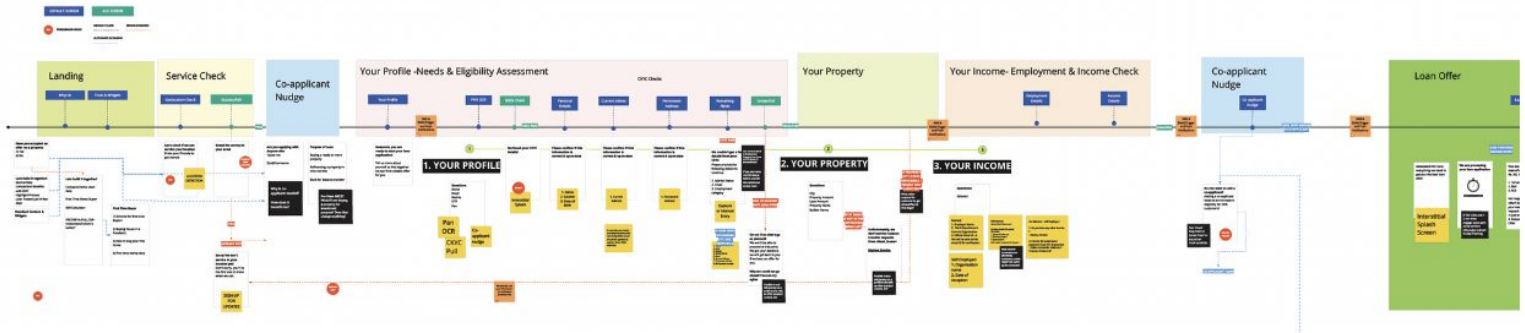
BCG Knowledge Team Associate

Bank UX/UI Designers

BCG Consultant

HL - D2C - SCREEN FLOW MAP								UNIQUE SCREEN	SWIM LANES	END OF FLOW	SEDUCIBLE MOMENTS
PHASE	ASSESS CUSTOMER NEEDS	ASK FOR MANDATES	AUTHENTICATE USING OTP	SHOW RESULT	GET PERSONAL DETAILS	CHECK FOR CO-APPLICANT	ASK FOR MINIMUM REQUIRED TO GET ELIGIBILITY	SHOW ELIGIBLE LOAN AMOUNT (WITH CAVEAT)	ASK FOR ADDITIONAL DETAILS REQUIRED	GIVE LOAN OFFER	SHOW LOAN APPLICATION STATUS & OPTIONS TO MANAGE
DRIVES ☺	Time, Convenience, Value for Money	Time		Validation through Success	Behavioral Compliance	Convenience	Compliance Laddering	Aspiration	Compliance Laddering	Validation through Success	Control
BLOCKS ☹	Unclear Value Prop	Safety		Remorse		Time	Cognition	Reciprocity	Cognition	Misinformation	
SCREENS	What is the **purpose** of taking this loan?	**We just need 2 things to unlock your eligibility!** 1 : Personal Details Please provide us a few details about you to get started 1. Name 2. DOB 3. PAN 4. Mobile		**Congratulations!** You are qualified for a loan.	**We got your details from CKYC!** Please confirm your personal details Name DOB Gender Marital Status Correct *Incorrect*	*Are you applying alone?* *[Yes, as an individual]* *[No, I have a co-applicant]*	2 : Income Details **What's your occupation? (Salaried/Self Employed)**	**Congratulations!** You are eligible for a loan of up to Rs. XXXXXXXX 1. Loan Amount 2. Tenure 3. EMI Apply Now	**You're almost there!** We need a few details to process your Loan Offer **[Salaried]** 1. Annual Bonus / Incentive 2. Mode of Salary Payment 3. Work duration in current job 4. Do you have any other income? (Y/N)	**Your final loan offer is ready!** Approved Loan Amount Tenure EMI ROI **Confirm**	Track Application Application Details Tasks to Complete Contact RM

Illustrative : Persuasion hooks mapped onto screen-flow of HLD2C journey based on key drives & blocks identified in research



Illustrative : Future-state journey map with screen flow for HLD2C (sanitised)

FOCUS AREA 1

Improve the user experience of product journeys to improve market share of customers and increase productivity for internal bank staff

APPROACH

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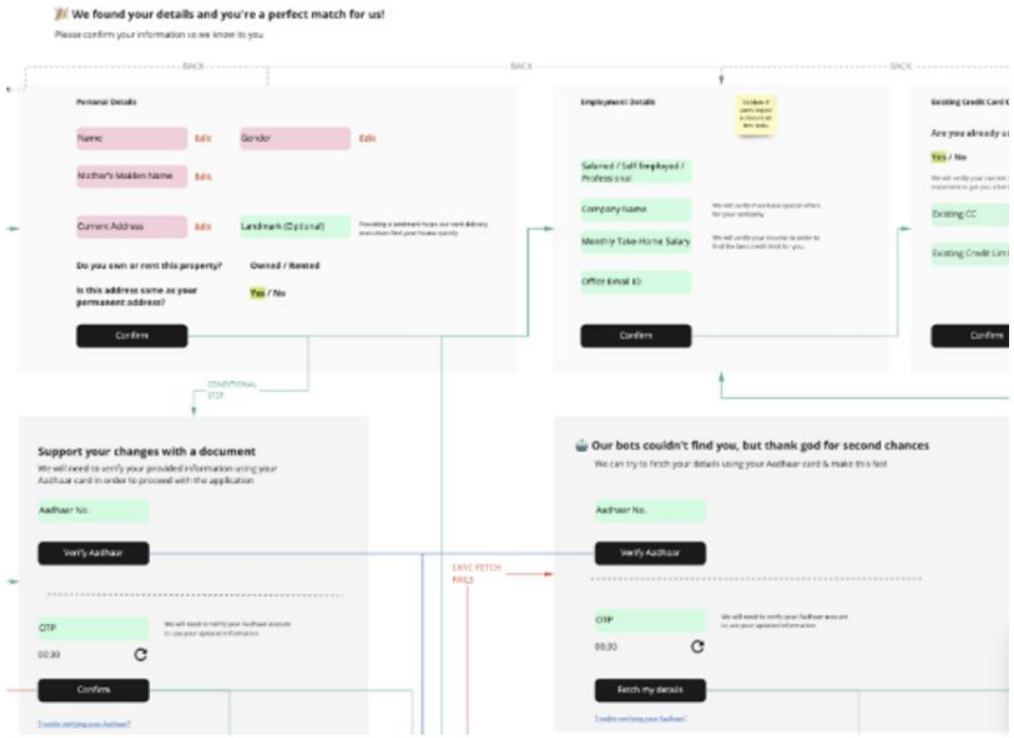
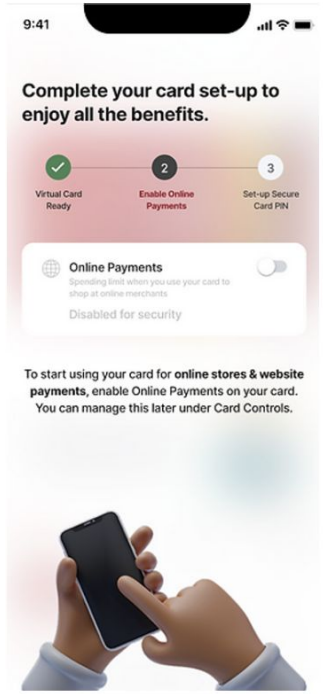


Lo-fi prototypes made on MIRO to compliment the customer journey



Illustrative : High-fidelity prototypes created to support walkthroughs

FOCUS AREA 1

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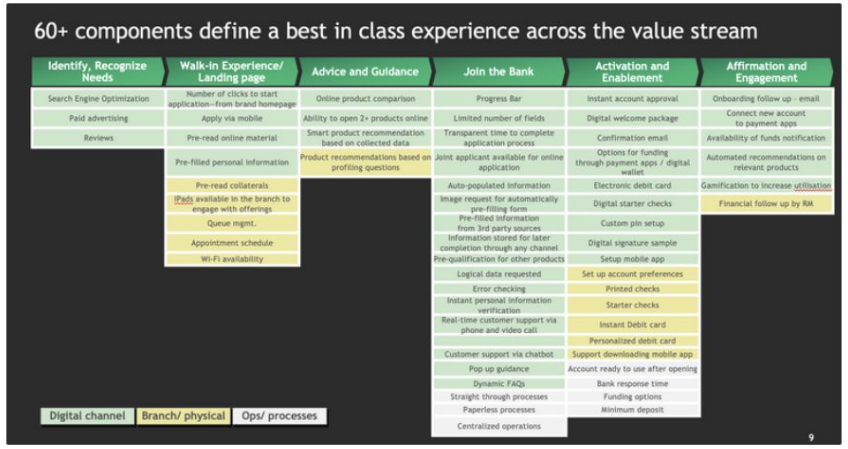
To scale the emerging solutions, I worked with product heads, BCG principals & architects, to evaluate end-to-end service blueprint & the tech stack in contrast with the competitors, to **create re-usable components to be leveraged across different products** such as KYC flow, Video PD, Authentication, etc. and identify technology partnerships to rapidly acquire capabilities across the service stream, such as *SimpleKYC, Hootsuite, Click-wrap, Meniga PFM, etc.*

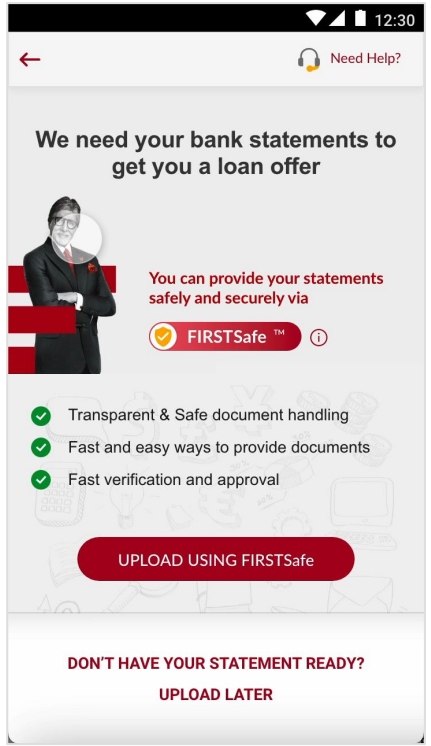
Best practices identified across major players for end state design

Category	Functionality	HDFC BANK	ICICI Bank	AXIS BANK	one	slice	MVP 1	End state (Planned)
		Large Banks			New age fin-techs			
Overall	E2E online journey	✗	✗	✗	✓	✓	✓	✓
	UI/UX quality (On a scale of 5)	★★	★★	★★	★★★★★	★★★★★	★★★	★★★★★
KYC Modes	CKYC	✗	✗	✗	✓	✓	✗	✓
	Aadhaar EKYC/OKYC	✗	✗	✗	✓	✓	✓	✓
	VKYC	✗	✗	✗	✗	✗	✓	✓
	Physical KYC	✓	✓	✓	✗	✗	✗	✓
Application submission	Data prefilling	✗	✗	✗	✓	✓	✓	✓
	Online document upload	✓	✓	✗	✗	✓	✓	✓
	Bureau based offer (No document offer)	✓	✗	✓	✓	✓	✓	✓
	Executive assisting to fill online form	✗	✗	✗	✗	✗	✗	✓
	Resume journey incase of drop off	✓	✓	✗	✓	✓	✓	✓
Card issuance/ activation	Issuance of virtual card immediately - STP	✗	✗	✗	✓	✓	✓	✓

Note: For ICICI Bank: Amazon card journey is E2E Digital with VKYC and Aadhaar EKYC integration
ource: Expert interviews , Customer Journeys



Illustrative : Re-usable components identified across the value stream (sanitised)



FOCUS AREA 1

Improve the user experience of product journeys to improve market share of customers and increase productivity for internal bank staff

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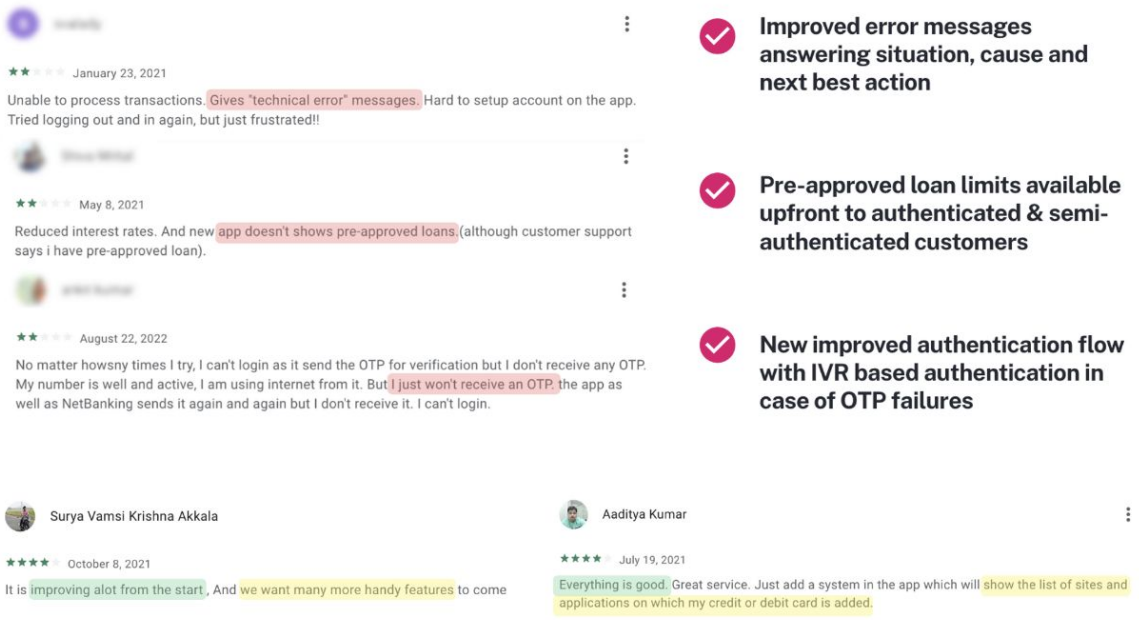
OVERALL IMPACT

- Across lending D2C flows, **optimisation of e-KYC modules accelerated effective lead generation for DSAs, and reduced drop-offs from ~85% to ~40%** at the verification stage gate of the funnel, in the first 2 months of go-live.
- For Small Medium Enterprise (SME) lending flows on DSA portals, we **significantly improved user experience and improved FTR to > 86% from < 60% in the past, for home & personal lending** with pre-approved limits, X-sell and up-sell offers, simplified Customer360 access and VideoKYCs
- Continued usability enhancements and feature upgrades led to an **improvement of app-store rating of mobile banking app from 2.8 to 4.2 and 2M+ downloads and improved customer reviews** on Playstore/AppStore & CSAT reports.



Led a team of designers for a digital challenger bank serving 7 million customers, overseeing its transformation to become a leading player in India's financial landscape.

MODULES MANAGED

- Home Lending
- Used Car & 2W Lending
- SME Lending
- NetBank & Mobile App
- Whatsapp Lending
- Personal Lending
- Credit Cards
- Ecosystem Apps
- Wealth Management
- Pre-Login Banking
- Error Handling
- Design System & Ops

FOCUS AREAS

I was appointed **as the head of Central Design Team** supported by 9 designers (BCG, vendor and bank's internal), responsible to drive the following outcomes;

1. Improve the user experience of product journeys to **improve market share of customers and increase productivity for internal bank staff**
2. Provide **thought leadership to innovate** on new features & business streams
3. Co-build & scale **effective designops & capability** within the bank

DEEP DIVE 2

Provide thought leadership to innovate on new features & business streams

APPROACH

Conduct stakeholder workshops to prioritise & define growth portfolio opportunities and exchange primary research learnings to support GTM strategy

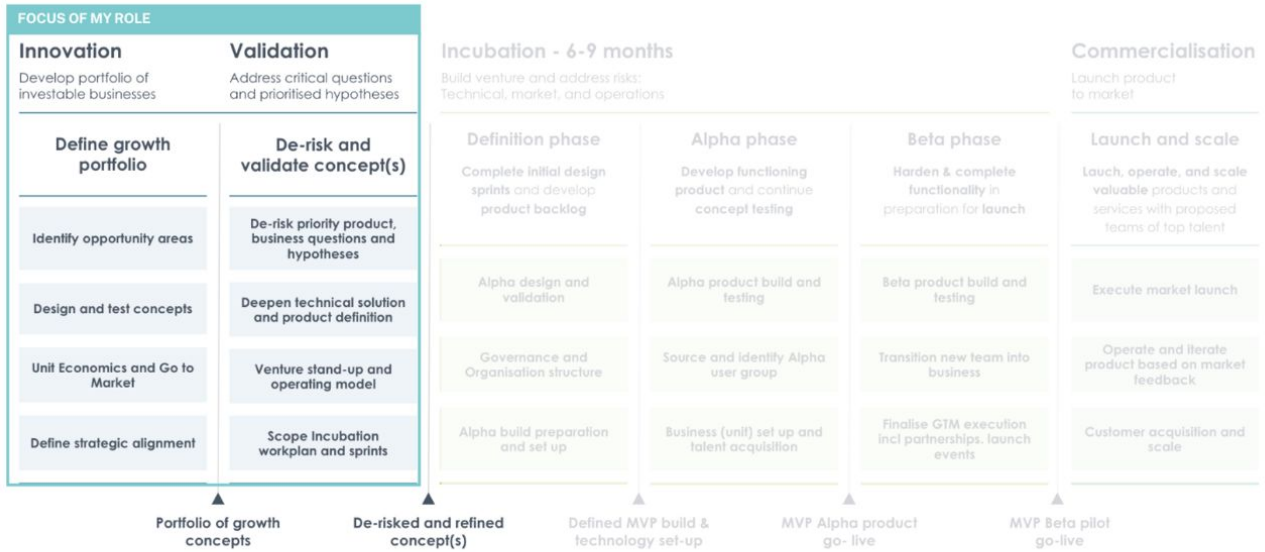
Facilitate rapid prototyping of sacrificial concepts

Enable rapid concept testing to validate concepts and de-risk hypothesis

Lead design for MVP build and co-create the implementation roadmap

I partnered with product heads and leadership to innovate on new features and services that emerged from our opportunity space. My key role was to;

- **Facilitate Hack-A-Future workshops** with product leadership and identify key opportunity areas of investment
- Provide relevant support (tools, methods, guidance) to teams to **build sacrificial concepts** to be validated
- Take part in validation sprints to **de-risk concepts and recommend inputs to the investment case**



Innovation framework stage-gated to de-risk concept development & investment

DEEP DIVE 2

Provide thought leadership to innovate on new features & business streams

APPROACH

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Facilitate rapid prototyping of sacrificial concepts

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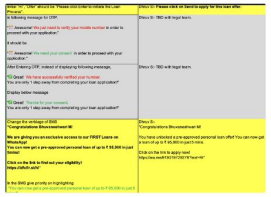
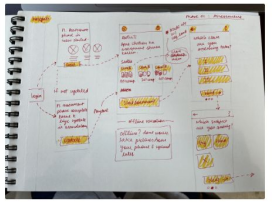
Lead design for MVP build and co-create the implementation roadmap

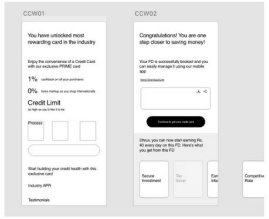
I guided the team to build low-med fidelity prototypes for concept validation. I also **encouraged the team to explore other channels, such as Whatsapp and SMS Banking where we tested our hypothesis using Script Cards**.



Optimization on Whatsapp lending scripts

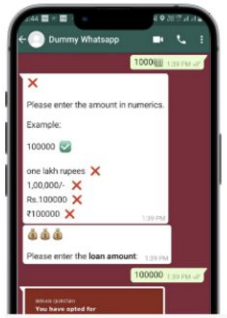


Paper sketches I produced for Experience Designers



Low-fidelity prototype for Credit Cards DIY

Whatsapp Lending



Increased flexibility for DSAs

High penetration provides a larger opportunity landscape

Vernacular language support

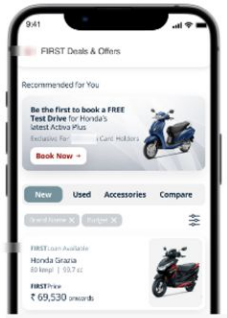
Lack of trust on the channel

Limited awareness on WhatsApp Banking

Complex authentication flow with RBI compliance

Pilot & measure success on everyday banking & customer support before launching for X-sell and lending opportunities

Super-App for deals



High affinity from customers on the value prop

Subscription based deals a good hook

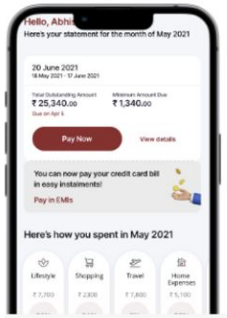
Complex ecosystem of offerings

Complex transition from native app to Super-app

Unclear redemption process

Explore relevant affiliation programs and soft-launch within the upcoming ecosystem of native app, followed by incremental builds on existing app

Smart Statements



Improved user experience promotes visibility on spends and available offers

High affinity for Download and Export function from most users

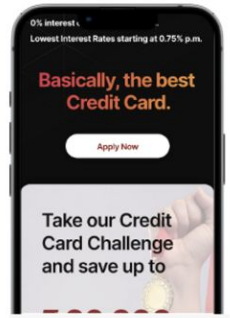
High effort on tech build required for consolidation

No integration of query resolution/ support

Browser compatibility

Pilot with insider retail customers in Tier 1 metro to measure engagement, followed by integration of support and broader Tier 1 group

Credit Cards DIY journey



Refreshing design, 'Apple' way of building excitement

Comparison tools serve as effective hook to engage & initiate the journey

Flexible card designs

Card fulfilment flow causes maximum drop-off & friction

Digital card offerings make users suspicious of potential threats

Information overload on features

Simplify value prop & comparison tool with clear guidance on the fulfilment process, followed by pilot on mobile app

Example sacrificial concepts during innovation sprints

DEEP DIVE 2

Provide thought leadership to innovate on new features & business streams

APPROACH

Conduct stakeholder workshops to prioritise & define growth portfolio opportunities and exchange primary research learnings to support GTM strategy

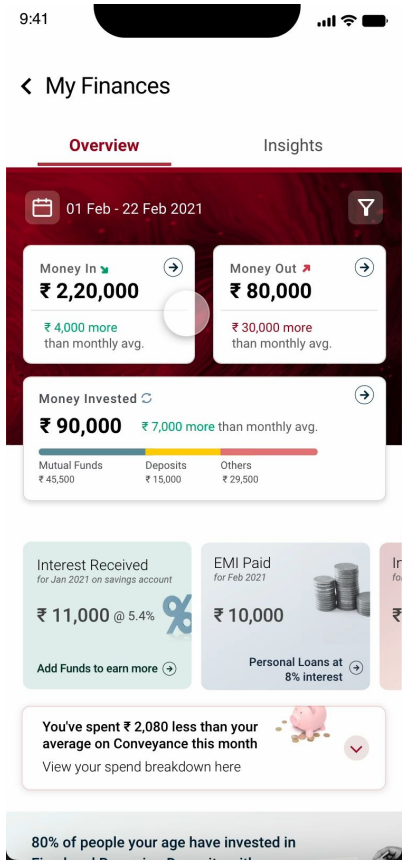
Facilitate rapid prototyping of sacrificial concepts

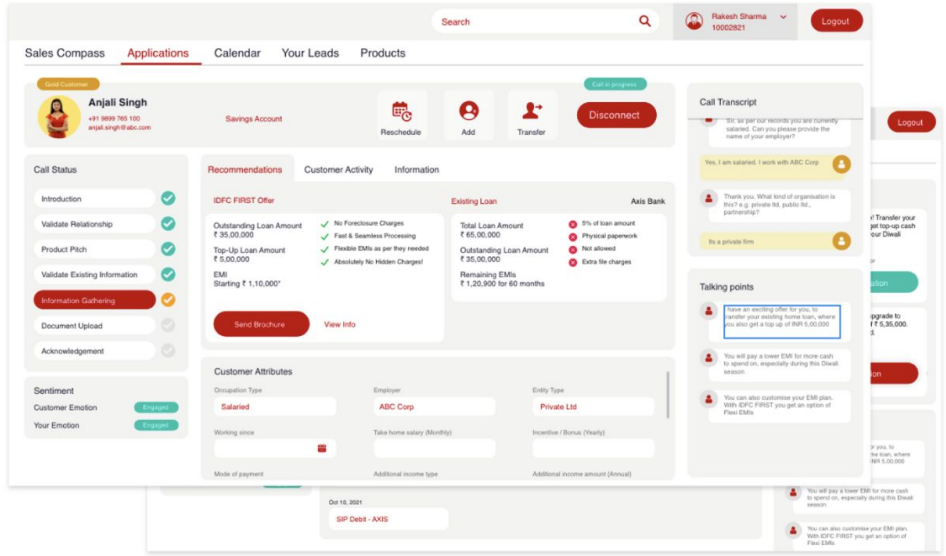
Enable rapid concept testing to validate concepts and de-risk hypothesis

Lead design for MVP build and co-create the implementation roadmap

As we validated the concepts, **some features received higher affinity than others,** whereas some products such as Super-App & Whatsapp Lending showed significant resistance from end customers. For DSA portals, we received positive feedback on feature set, VideoKYC and access to Customer 360 X-sell opportunities, powered by HPE was a big hit.

As a next step I worked with Head of Products to lay out a **development plan for MVPs** and collaborated with development partner to **identify potential risks, constraints, alternates and effort estimates.**





Concept for DSA Dashboards was a big hit with Video KYC & Quick access to Customer360 insights being most liked feature set

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DEEP DIVE 3

Co-build & scale effective designops & capability within the bank

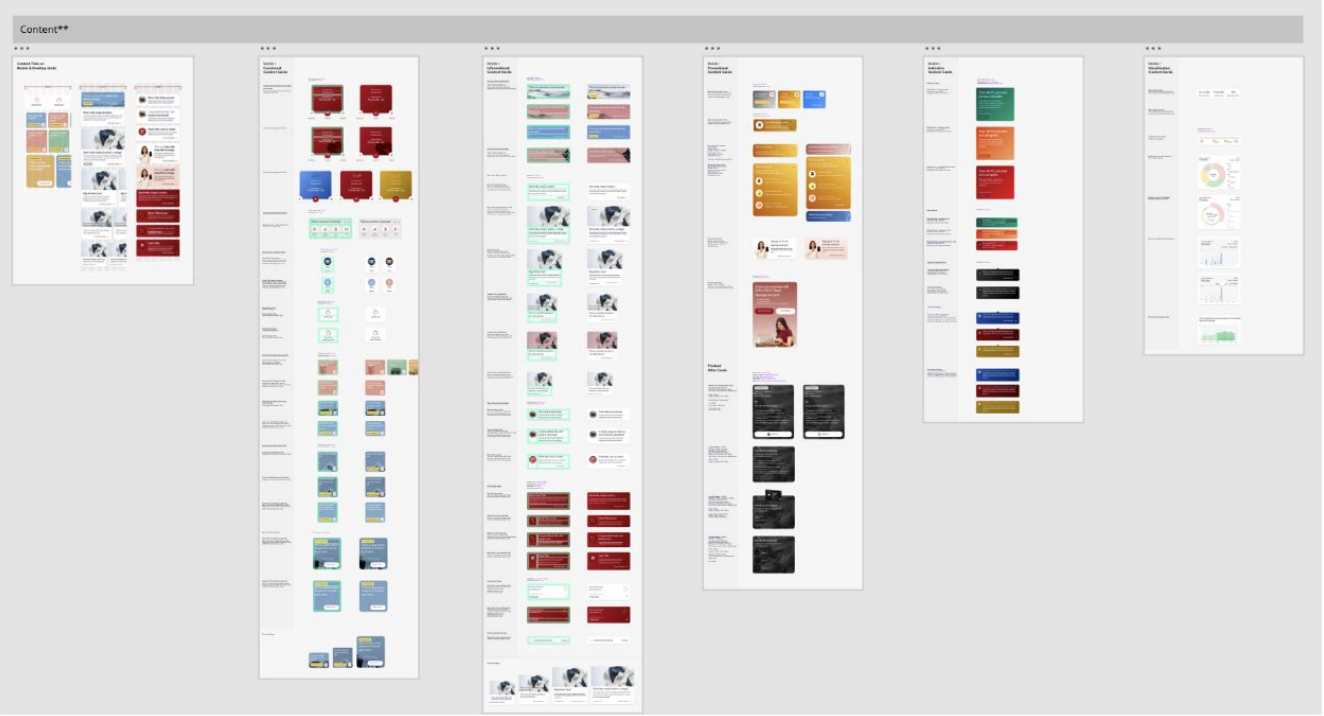
APPROACH

Lead the build of unified design system for internal bank & partner products

Enabled effective operations for the Design Team with recruitment support, trainings and frameworks to re-purpose

I actively **contributed to update the bank's design system** in collaboration with the bank's UI design vendors, BCG Experience Designers, and Head of Digital. Together, we defined a comprehensive set of design principles, components, and guidelines that resulted in a cohesive and intuitive user interface across all digital channels.

This updated design system **significantly reduced inconsistencies, accelerated time to market, and enhanced productivity across the bank**. Moreover, it provided a unified brand experience and laid the foundation for seamless future design iterations.



View on Bank's Component Library as a part of overall Design System

DEEP DIVE 3

Co-build & scale effective designops & capability within the bank

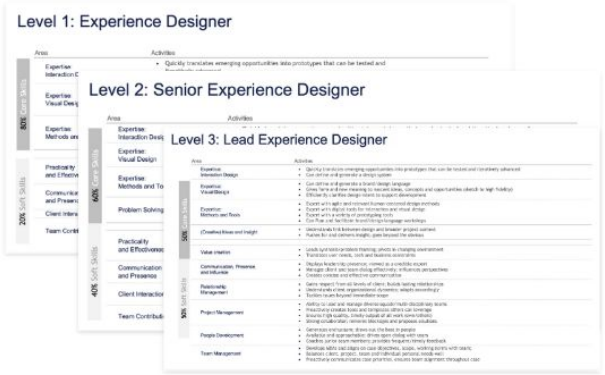
APPROACH

Lead the build of unified design system for internal bank & partner products

Enabled effective operations for the Design Team with recruitment support, trainings and frameworks to re-purpose

I played an active role in recruiting top design talent across both SD and XD skills, working closely with HR and other stakeholders.

I **built comprehensive Job Descriptions and Career Competency Framework for the Design team**. Through a collaborative effort, we carefully interviewed and onboarded designers who shared the bank's vision and could make valuable contributions to its growth and innovation.





Competency Frameworks produced for the bank and key re-usable frameworks/artefacts created to enable effective DesignOps

DEEP DIVE 3

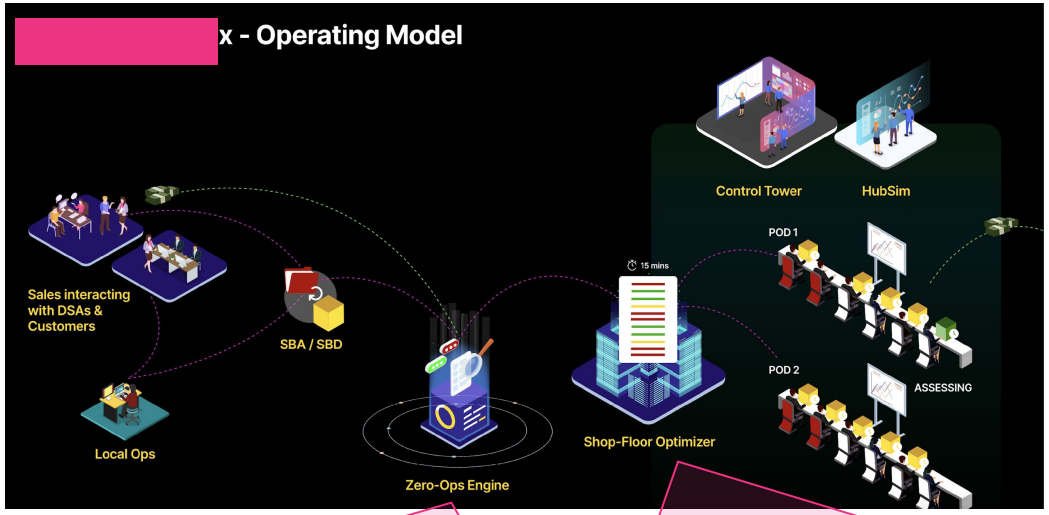
Co-build & scale effective designops & capability within the bank

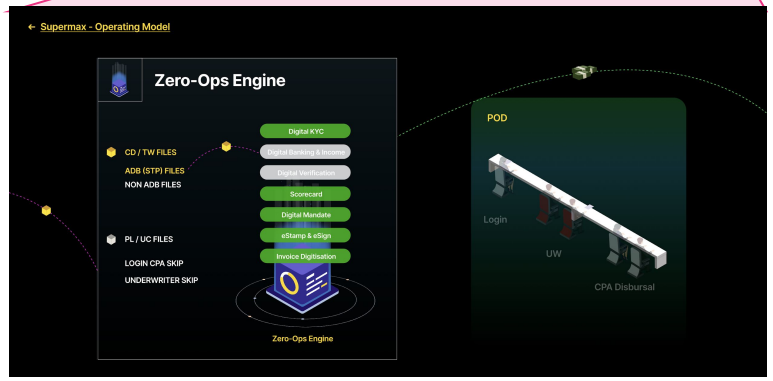
APPROACH

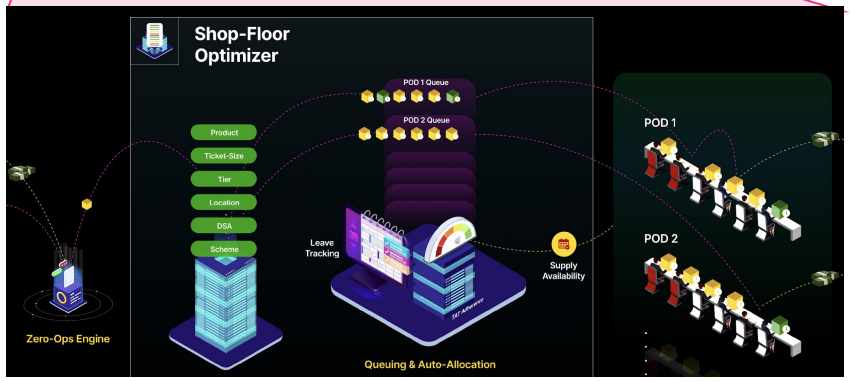
Lead the build of unified design system for internal bank & partner products

Enabled effective operations for the Design Team with recruitment support, trainings and frameworks to re-purpose

I worked with BCG Leadership and Bank Leadership to build a **re-imagined view of Operating Model for lending squads** to support reduced TATs, efficient file handling and faster resolution across teams.







DEEP DIVE 3

Co-build & scale effective designops & capability within the bank

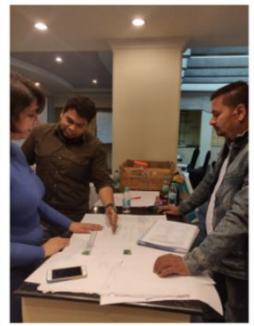
APPROACH

Lead the build of unified design system for internal bank & partner products

Enabled effective operations for the Design Team with recruitment support, trainings and frameworks to re-purpose

To nurture the capabilities of the newly formed design team and foster continuous design knowledge across teams, I identified knowledge gaps and facilitate an org-wide Design101 session, providing foundational understanding of Human Centred Design to broader organisation, stimulating design thinking.





Additionally, I developed several recommendations;

- for **learning and development** initiatives tailored specifically for the design team, internal brown bag sessions & industry relevant certification programs,
- for **knowledge sharing across teams** fortnightly module updates with Design Manager & Product Owners, Monthly Design Newsletter to evangelise design, unified MIRO board for Central Design Team to share relevant research, templates, etc.
- **cross-functional mentorship programs** to provide guidance and support for designers to up-skill & cross-skill.

These initiatives collectively strengthened the design team's proficiency and contributed to a culture of continuous learning and improvement.

Agenda

My profile

Top projects

Case Study 01 : Leading a design team for a bank’s digital transformation

Case Study 02 : Leading a design team to accelerate digital growth for a cruise company

My references

Led a digital growth acceleration program for a leading cruise line in Australia & New Zealand

CONTEXT

The client is one of the leading cruise companies in Australia & New Zealand.

To serve the post-pandemic shift in customer demand, the cruise company engaged BCG for a **12-week digital growth acceleration program** to achieve short-term growth & lay a foundation for future growth.

THE TEAM

The program was an **"all hands on deck"** effort split in 3 key phases across 12 weeks, where I worked within an **acceleration squad** that comprised:

- BCG Experience Designers
- BCG Growth Specialists
- BCG Consultant
- BCG Data Analyst
- Client : Growth Specialist
- Client : Managers in Product, Technology & Revenue team

Led a digital growth acceleration program for a leading cruise line in Australia & New Zealand

MY ROLE

As the Project Lead, I had the responsibility of managing client relationships involving collaboration with revenue, technology, and product heads on day-to-day decisions and facilitating sprint workshops as well as SteerCos with leadership.

FOCUS AREAS

I lead the **Digital CX & Marketing** squad**,** supported by 3 designers (BCG & client), data analyst, and venture architect responsible to drive the growth agenda in 3 phases;

Phase 1 : Deliver prioritized quick-wins from large value pools

Phase 2 : Explore high-value use cases & build foundation for the future

Phase 3 : Build a strategic blueprint to enable medium-term vision

	WEEK 1-4	WEEK 5-8	WEEK 9-12
	Deliver prioritized quick-wins from large value pools	**Explore high-value use cases & build foundation for future**	**Build a strategic blueprint to enable medium-term vision**
WESBITE	Conducted quick **website diagnostic and heuristics assessment** to uncover immediate gaps in CX. **Launched 27 use cases** focussed on improving functional performance as well as customer experience on the website.	Identified **key pain points & opportunities** from use-case performance & qualitative insights, to lay a strong foundation for the blue-print of the future website. Also identified **gaps in current operating model** to recommend best practices for DesignOps.	Designed a **future-state roadmap with 58 identified features & ready to develop prototypes for booking journey**, to establish cruise website as a primary booking channel with a target conversion rate of ~4% (from 2.2%)
DIGITAL MARKETING	**Designed & launched 16 key use cases** (new campaigns, new channels, re-design of existing campaigns, etc.) focussed on driving a meaningful and immediate impact on performance and revenue	Made further **improvements of Return On Ad Spend (ROAS) for Google and Facebook by reallocating spend from less efficient to more efficient campaigns**. Launched new creatives & new opportunities to **drive top of funnel growth and conversion** (eg, through Influencer channel)	Enabled the team with a **future roadmap to accelerate digital marketing initiatives**, with an established framework to run growth initiatives and manage content effectively.

PHASE 01

Deliver prioritized quick-wins from large value pools

APPROACH

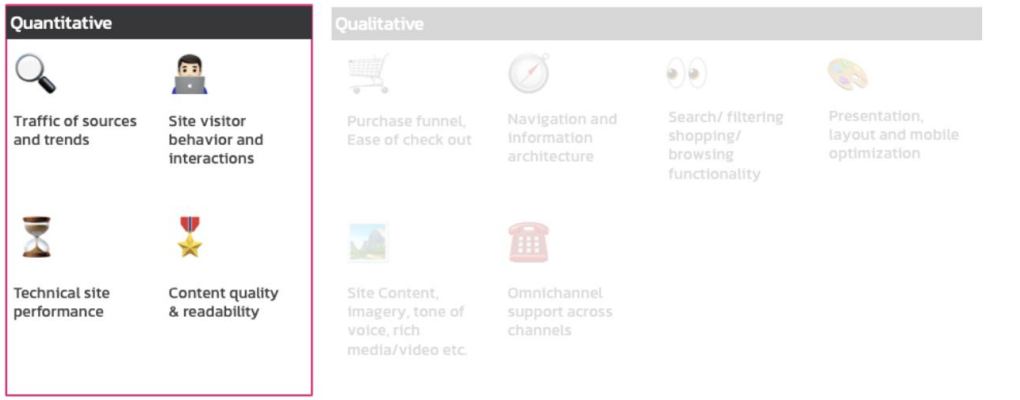
Led Secondary Diagnostic

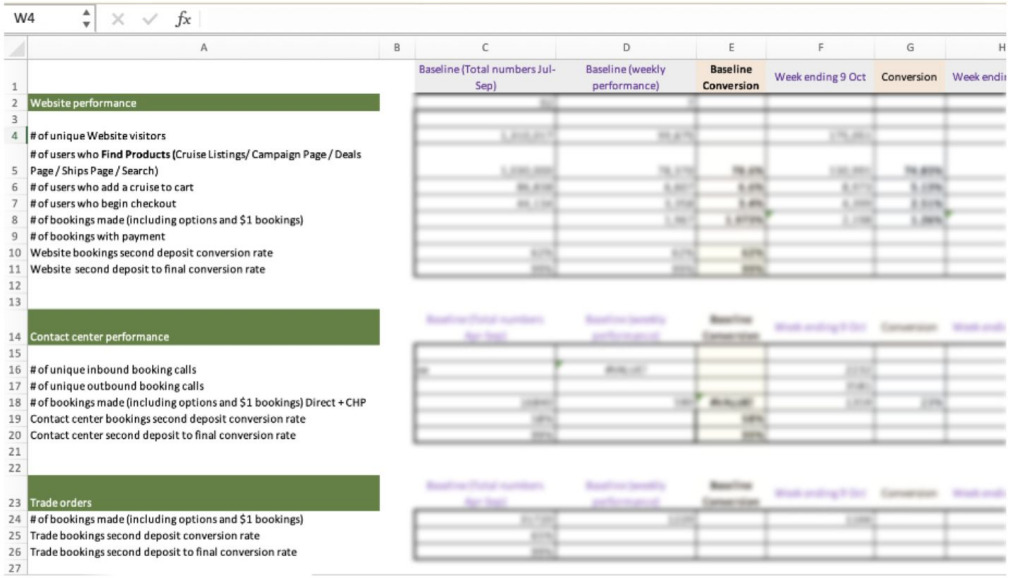
Led CX Heuristic Audit for the Website

Implemented ‘quick-wins’ across the site & set-up test & learn

To **identify the key drop-off stages in the customer journey**, I conducted regular analysis of GA funnel performance on a weekly basis. Additionally, I delved deeper into customer interactions by utilizing Fullstory.

Collaborating with BCG's in-house ecommerce team, I mapped out technical performance, analyzed customer interactions, assessed content quality on the website and analysed competition performance.





PHASE 01

Deliver prioritized quick-wins from large value pools

APPROACH

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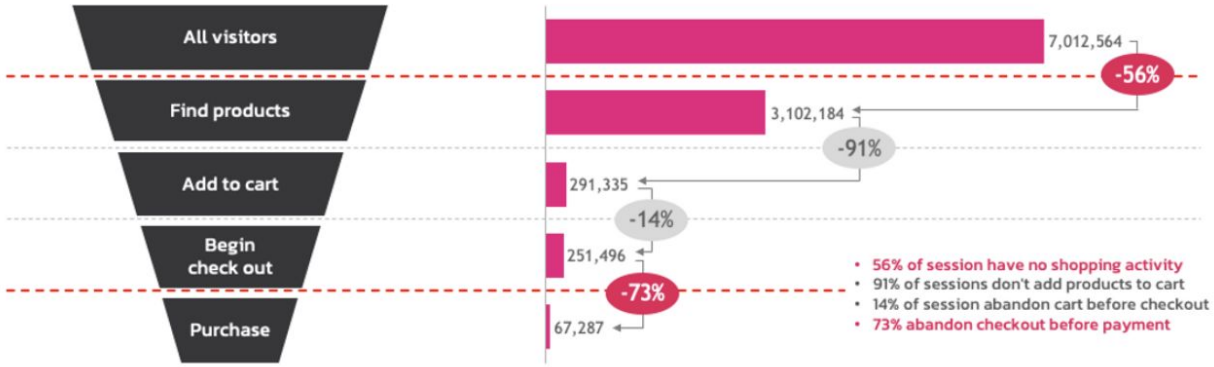
POST-PANDEMIC IMPACT ON BUSINESS

- 31% of company's travel agents in 2019 have permanently closed
- Customers are willing to spend more, however, **latent fear of isolation** is a strong blocker
- Customer preferences have grown significantly to Digital Channels, website has the potential of being the primary booking channel

FUNNEL PERFORMANCE



VOICE OF CUSTOMER

- **Poor error handling & resolution** for customers leading to higher call volumes at in-bound CC
- Website needs to highlight **special deals** more effectively to increase mind share with consumers
- Customers making calls about sales had generally positive experiences whereas **service call customers had generally negative experiences**
- Significantly high call volumes around **covid-19 / safety concerns** pre-cruise
- Guests are happy to **share positive experiences**, this is not leveraged effectively; social learning proving to be a strong marker for competition

PHASE 01

Deliver prioritized quick-wins from large value pools

APPROACH

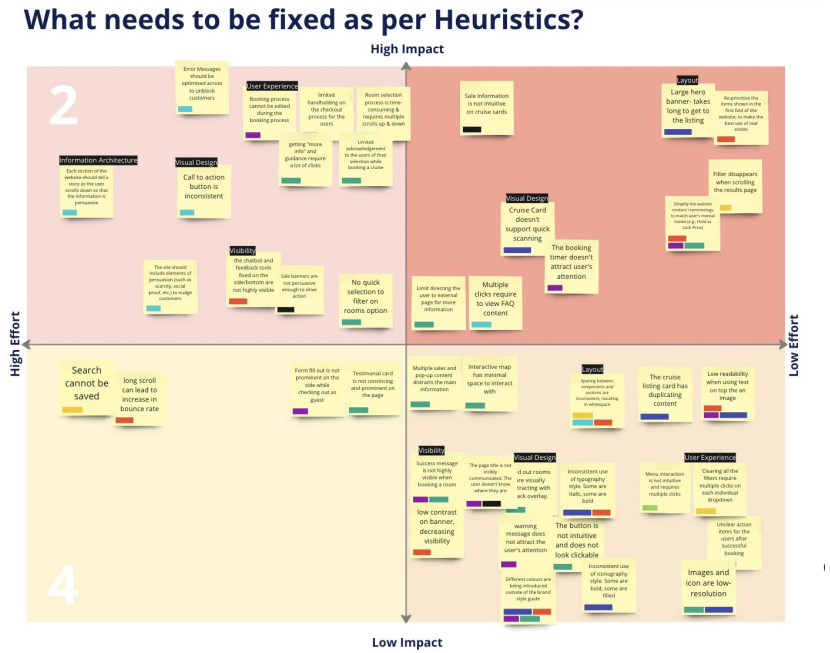
Led Secondary Diagnostic

Led CX Heuristic Audit for the Website

Implemented ‘quick-wins’ across the site & set-up test & learn

KEY INSIGHTS

- **Information Architecture needs to be optimised** to make it easy for users to find what they're looking for
- Page layouts need to be improved to support **quick scanning and build visual hierarchy**
- The **website terminology** should be optimised to match user's mental model
- **UI Controls & elements** should be optimised for consistency & affordance throughout the page scrolls
- **Task flows should be optimised** to avoid redirection to multiple pages in a seamless cohesive screen flow
- **Chatbot should support the booking flow** by providing users the support & prompt as needed on different pages
- Website should include **more images/videos that create a stronger visceral impact** that makes cruises more aspirational & also provide a realistic view of what-to-expect
- **Multiple sales offers** should be avoided on the website to avoid confusion
- Website should align to a **consistent Design System** that serves as a central guide for any new components, modules being introduced. This allows for consistency and improved brand trust.



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Deliver prioritized quick-wins from large value pools

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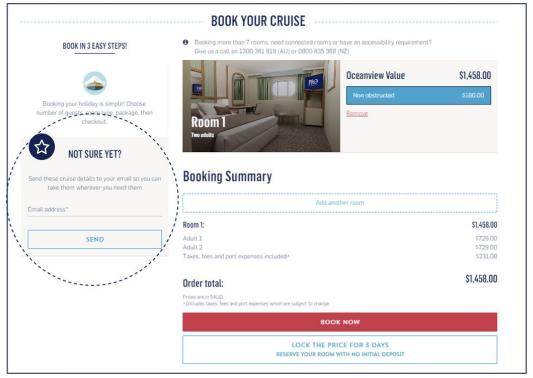
OUTCOME

- **Launched 27 use cases** focussed on improving functional performance as well as customer experience on the website.
- Made updates to existing Design System to be re-purposed in future designs
- Enabled the product team to leverage a **Test & Learn approach** by weekly Performance Workshops

Email Itinerary widget on booking summary page has improved customer experience and seen a 13x increase in sent quotes

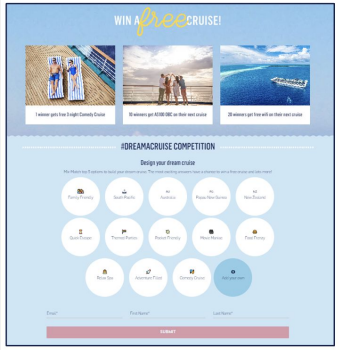


Increase in customers emailing itineraries suggests an improved customer experience

~13 x increase

0.3%	3.8%
of visitors who Add to Cart emailed an itinerary (~25 per week)	of visitors who Add to Cart emailed an itinerary (~500 per week)

Competition to drive marketing consent has drove significant marketing consents in its first 7 days



~16k Total Entries

- 29% are new guests
- 31% are existing guests re-adding marketing consent

~10k Marketing consents

↑ **250%** **New sign-ups on site** From 281 to **981 per day**

↑ **152%** **Re-adding consent on site** From 171 to **430 per day**

Next steps

- Facebook ads to promote competition to past unsubscribes are live
- Monitoring of engagement with sign-ups post competition (purchases, unsubscribes, eDM engagement etc.)

Example Use-Cases from Phase01

PHASE 01

Deliver prioritized quick-wins from large value pools

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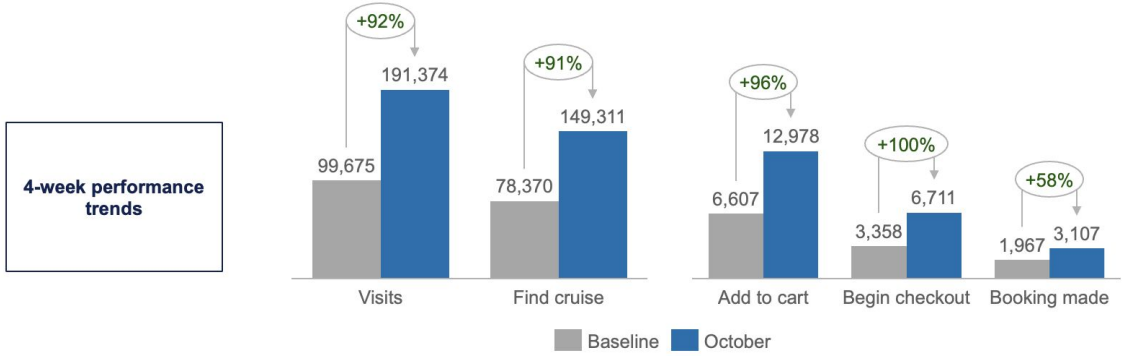
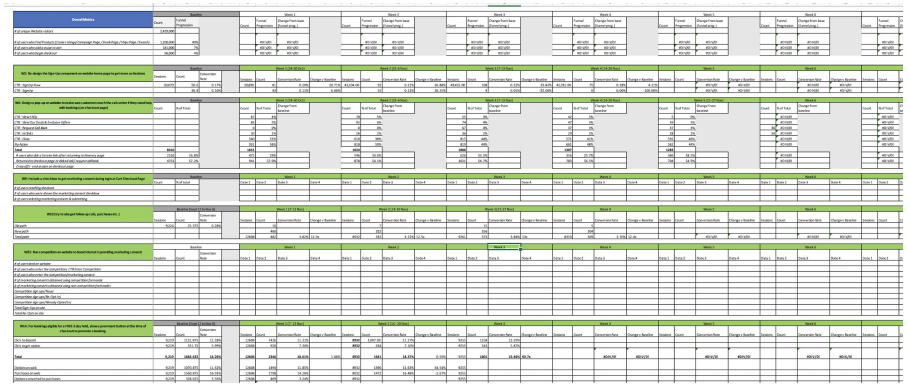




Use Case Measurement sheet consolidates WoW performance across metrics need to be measured for each use case

PHASE 02

Explore high-value use cases & build foundation for future

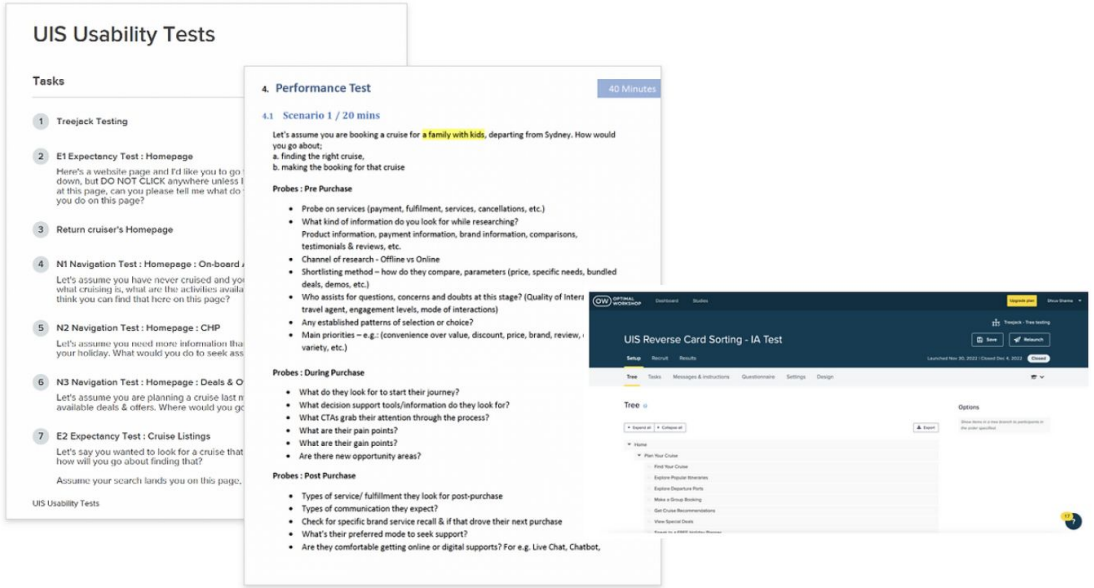
APPROACH

Led User Research with New & Returning Customers

Led co-creation workshops to build a view on future website experience

We **conducted a rapid qualitative remote research with end customers** using Optimal Workshop & Zoom. In collaboration with data analysts and business heads, I prioritized customer segments and recruited a total of 8 customers (new and returning) in Australia.

Additionally, I took the **lead in designing the research guide and facilitated 4 of these sessions**, while enabling the BCG Experience Designer to facilitate the rest.



COMPONENTS TESTED

- Live Site Performance via Booking flow & Support flow
- Concept Testing of new modules
- Information Architecture through RCAs
- Emotional drivers & blockers

PHASE 02

Explore high-value use cases & build foundation for future

APPROACH

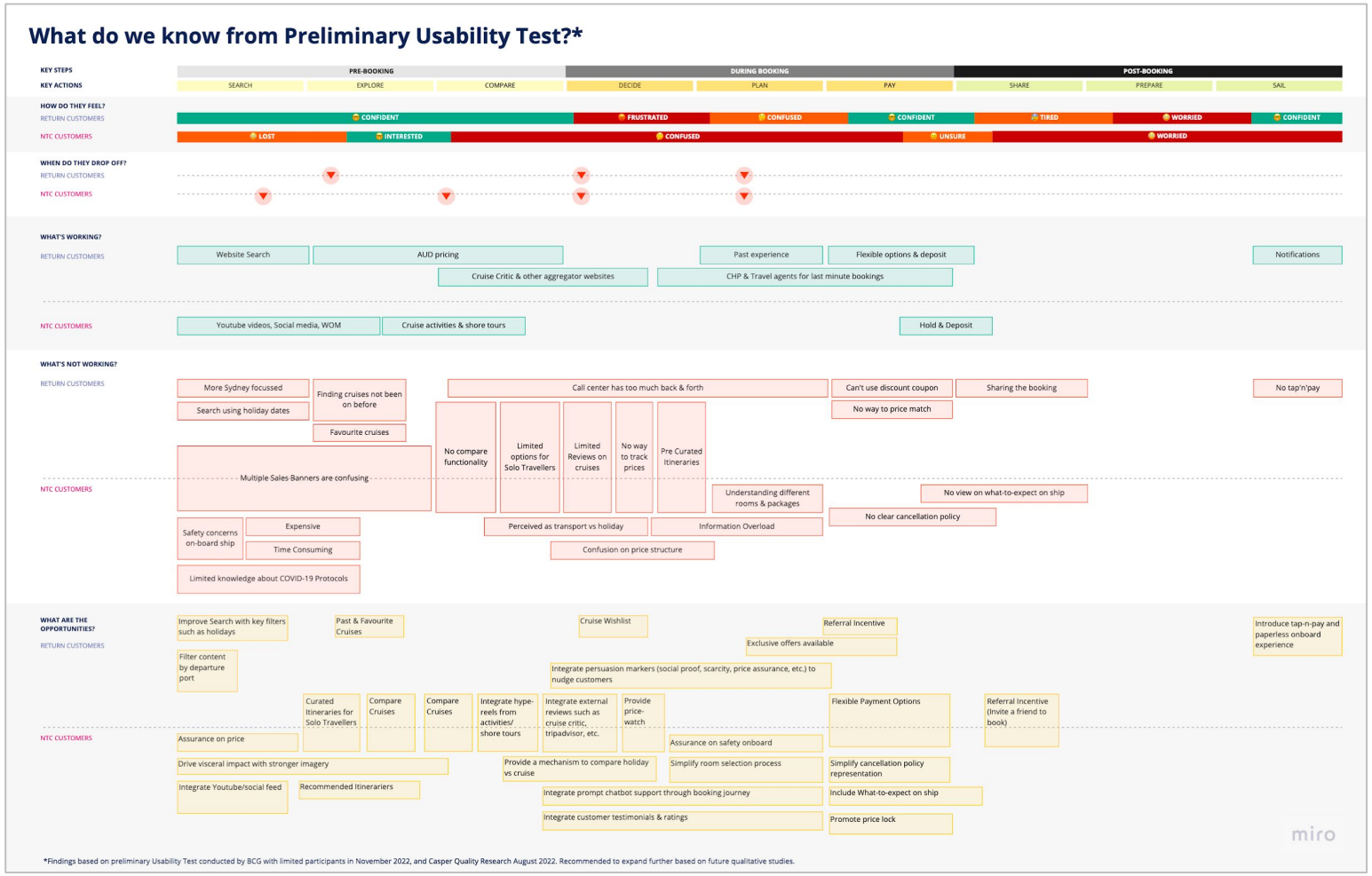
Led User Research with New & Returning Customers

Led co-creation workshops to build a view on future website experience

OUTCOME

We successfully **mapped out key opportunity areas across the customer journey.** Moreover, we conducted in-depth analysis of prioritized pages that were experiencing significant drop-offs and **tested the site's information architecture.**

This analysis led us to uncover many iterations and 12 new features that would enhance the digital experience and provided insights into the prioritized customer archetypes.



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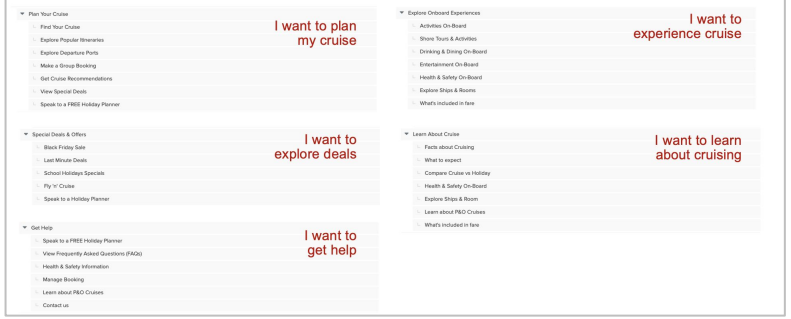
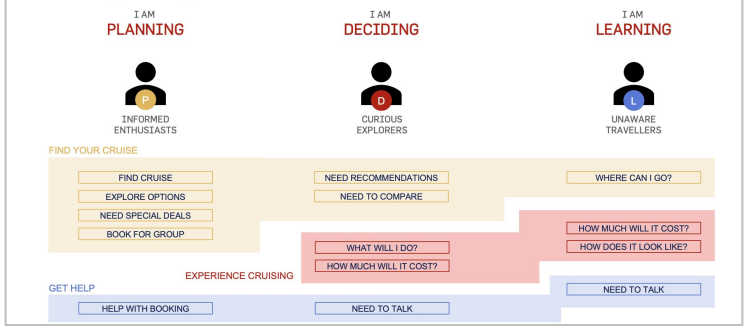
OUTCOME

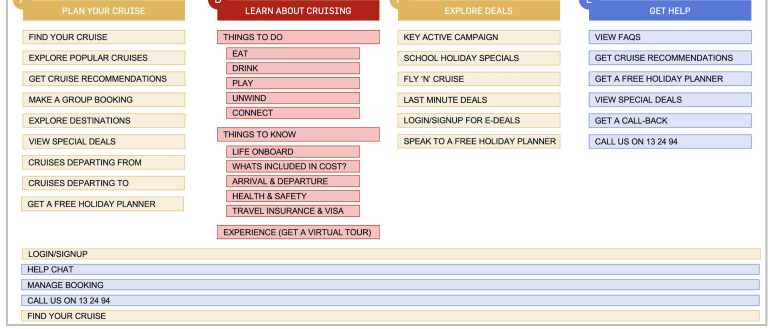
We tested the preliminary IA proposed as per themes observed in previous studies and UX Audit



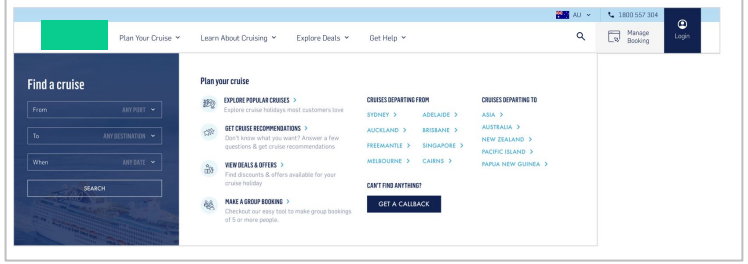
We grouped key actions across user segments into common tasks supporting the users



Revised IA : Non-LoggedIn Customer



Concept : Dynamic Primary Navigation



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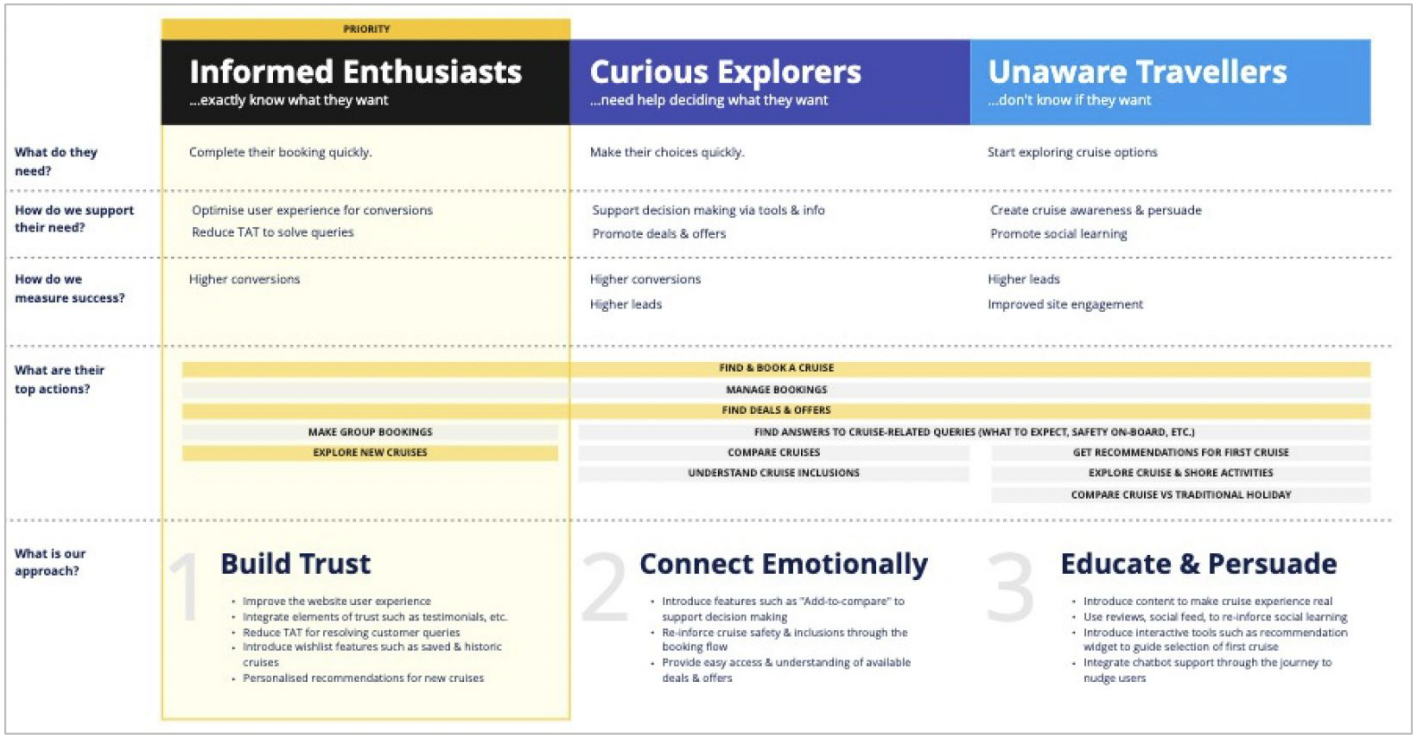
As we collected qualitative insights, we conducted rapid journey mapping to identify pain points and opportunity areas across the customer journey for the prioritized segment.

In order **to support the customer experience, we gathered more than 100 use-cases**. Taking the lead, I organized co-creation workshops involving business, technology, and product teams **to effectively prioritize 58 use cases for the future roadmap of the website across 4 key enablers.**



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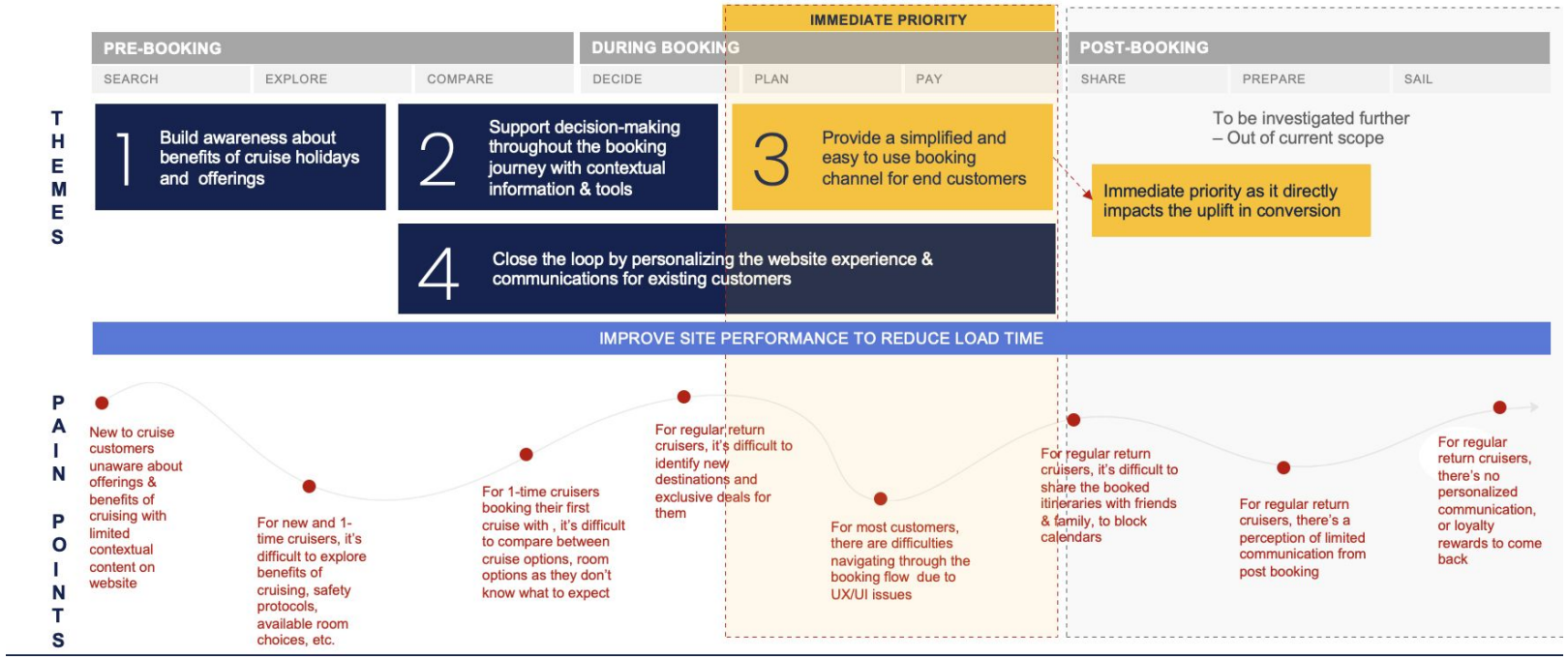

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	A	B	C	D	E
1	Enabler	#	Use-Case	Pha	Concep
2	1 Build awareness about benefits of cruise holidays and P&O offerings	1.1	Contextually place 'cruising facts' widget across pages	1	Y
3	1 Build awareness about benefits of cruise holidays and P&O offerings	1.2	Contextually add 'safety on cruise' widget across pages	1	Y
4	1 Build awareness about benefits of cruise holidays and P&O offerings	1.3	Use viscerally strong images on the landing page to hook	1	Y
5	2 Support decision-making throughout the booking journey with contextual information & tools	2.1	Contextual recommendation wizard	1	Y
6	2 Support decision-making throughout the booking journey with contextual information & tools	2.2	Contextual customer reviews across pages	1	Y
7	2 Support decision-making throughout the booking journey with contextual information & tools	2.3	Themed Itineraries widget	1	Y
8	2 Support decision-making throughout the booking journey with contextual information & tools	2.4	Compare Cruises widget	1	Y
9	2 Support decision-making throughout the booking journey with contextual information & tools	2.6	Simplify content for booking flow	1	Y
10	2 Support decision-making throughout the booking journey with contextual information & tools	2.7	Simpify cruise cards on search results	1	Y
11	2 Support decision-making throughout the booking journey with contextual information & tools	2.8	Share itinerary	1	Y
12	3 Provide a simplified and easy to use booking channel for end customers	3.1	Simplify UX/UI of booking flow	1	Y
13	3 Provide a simplified and easy to use booking channel for end customers	3.2	Integrate Compare Rooms in booking flow	1	Y
14	3 Provide a simplified and easy to use booking channel for end customers	3.3	Include Dietaries & Preferences option in booking flow	1	Y
15	3 Provide a simplified and easy to use booking channel for end customers	3.4	Reduce site-content load time (LCP)	1	N
16	3 Provide a simplified and easy to use booking channel for end customers	3.5	Revise primary navigation system	1	Y
17	3 Provide a simplified and easy to use booking channel for end customers	3.6	Simplify price packages in booking flow	1	Y
18	3 Provide a simplified and easy to use booking channel for end customers	3.7	Track prices	1	Y

Deliverables | Use-Cases | Folder Structure | --Workplan | +

PHASE 03

Build a strategic blueprint to enable medium-term vision

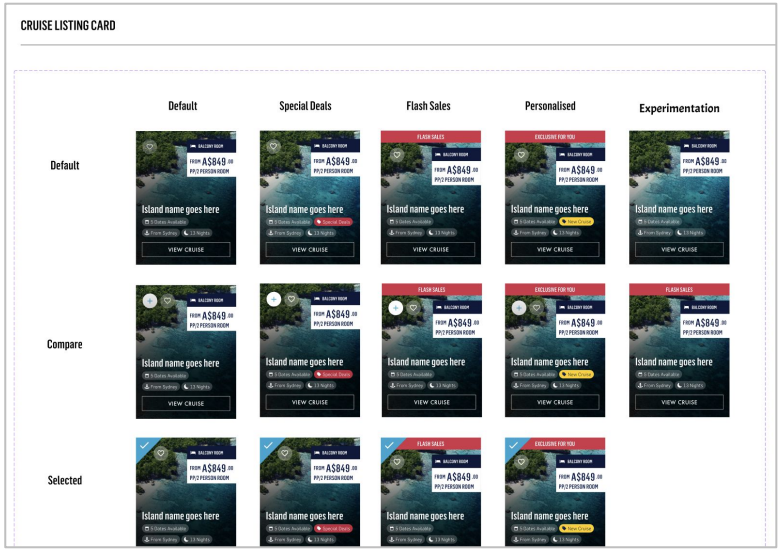
APPROACH

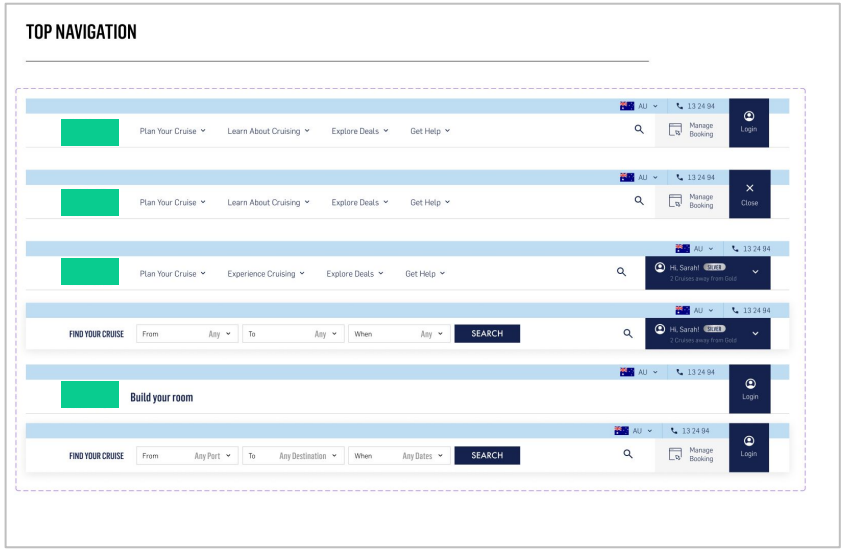
Led the end-to-end design & roadmap of re-imagined website experience

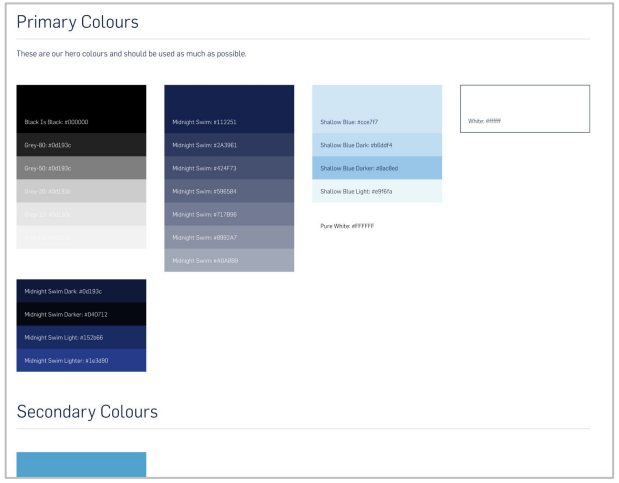
Provided guidance on capability uplift to support ongoing growth

I led the **build of reimagined information architecture and design system** with user experience guidelines and key re-usable templates for mobile and desktop, followed by building out the design library along with other BCG Designers.

We used Figma to build out an **interactive prototype** of re-imagined website to bring key changes and new features to life and serve as a north star for further website implementation







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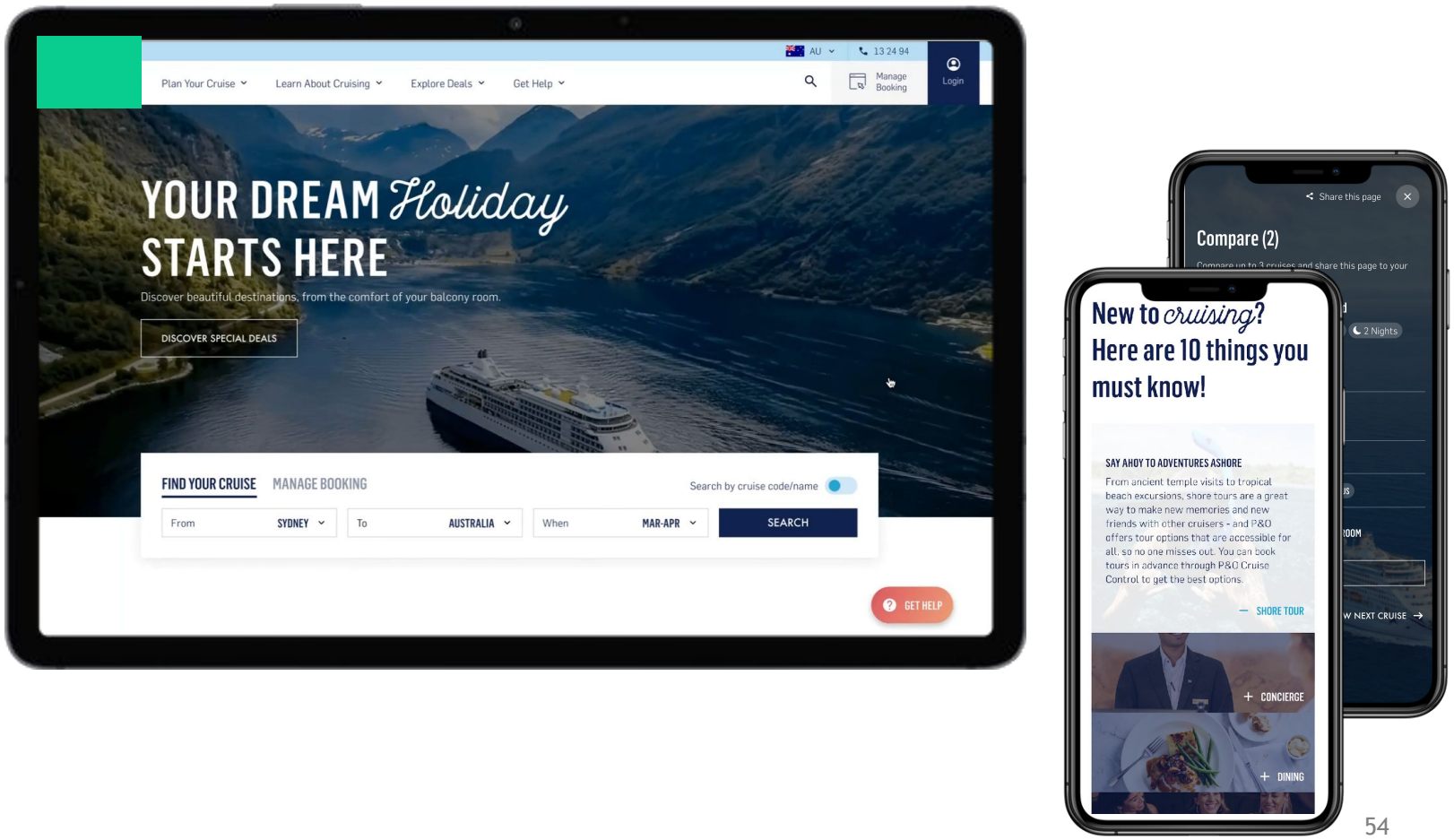


PHASE 03

Build a strategic blueprint to enable medium-term vision

APPROACH

Led the end-to-end design & roadmap of re-imagined website experience

Provided guidance on capability uplift to support ongoing growth

I took on the task of **building a custom dashboard to measure website performance.** This dashboard utilized GA4 data as well as experimentation data to provide a comprehensive view of key metrics and insights. By analyzing this data, we were able to track the effectiveness of our website and make data-driven decisions for further improvements.



PHASE 03

Build a strategic blueprint to enable medium-term vision

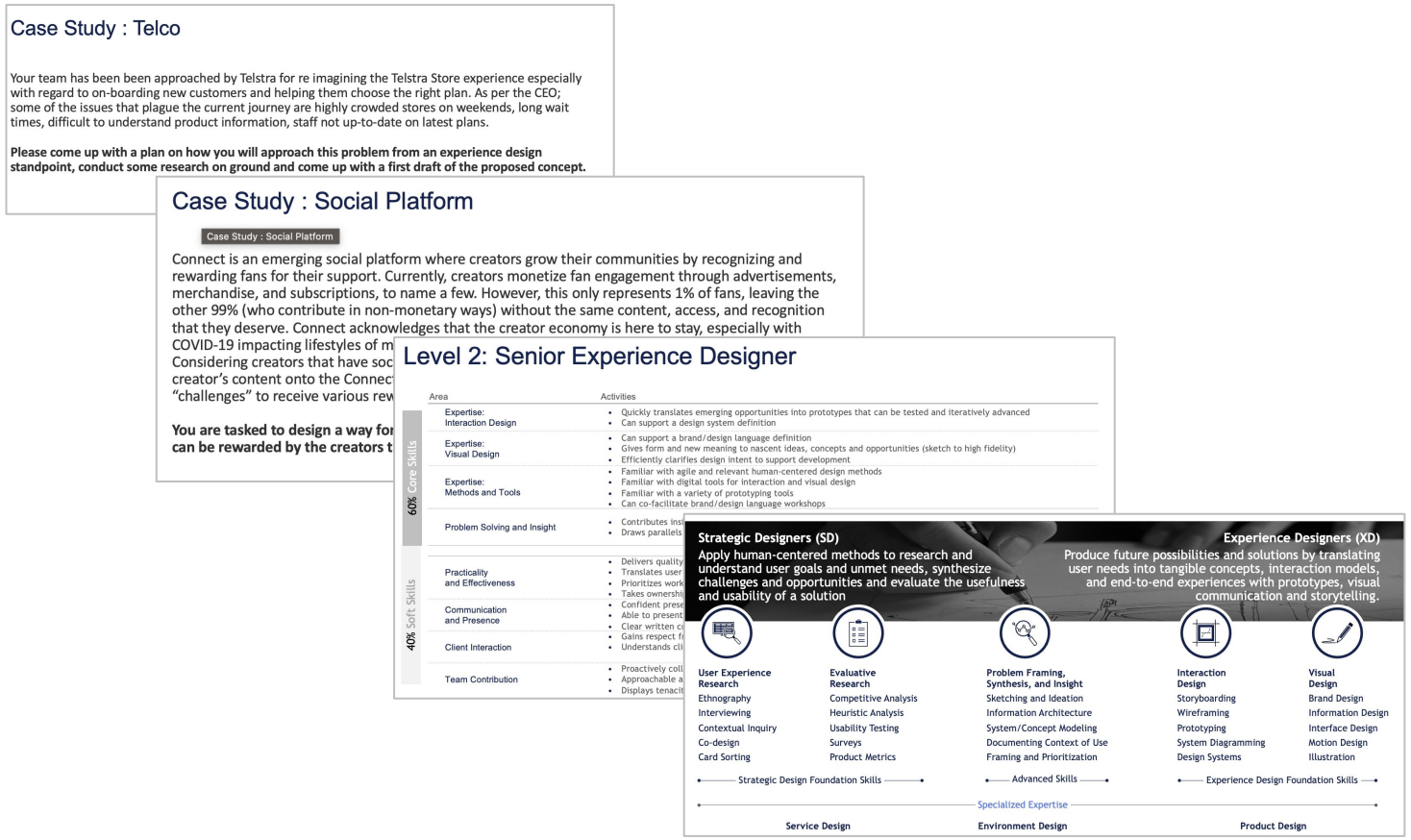
APPROACH

Led the end-to-end design & roadmap of re-imagined website experience

Provided guidance on capability uplift to support ongoing growth

Furthermore, I played a crucial role in supporting the Product team in **developing an effective Design framework**. This involved creating an organizational structure with clearly defined roles and responsibilities at different levels.

Additionally, I provided the team with access to best-in-class Human-Centered Design (HCD) frameworks, tools, and methods. These resources equipped them with the necessary tools and knowledge to excel in their future design initiatives.



IMPACT

We made a positive impact on key metrics over the 12 weeks of the project from October to December 2022



70%

increase in weekly website traffic (~100K unique visitors per week in Jul-Sep to ~170K per week in Oct-Dec)

150%

Increase in # of visits generated per $ spent on Facebook over Jul-Sep period

+21,000

marketing consents increased

- **New disciplines around website performance measurement** to understand funnel leakage points and track impact of use cases delivered
- **New User Testing capability** to gain understanding of current pain points on website and expectations from an end user perspective
- Developed **blueprint for future web design with an implementation plan –** incorporating best-in-class concepts of visual design and user experience

The recent quote I swear by

“if data fostered better emotional decisions, then accountants; not poets, would be the cultural prototype for great lovers.”

Martin Lindstrom, Small Data

Agenda

My profile

Top projects

Case Study 01 : Leading a design team for a bank’s digital transformation

Case Study 02 : Leading a design team to accelerate digital growth for a cruise company

My references

Here are people who’d be happy to share their experiences working with me.

Monica Wegner
Managing Director & Partner
Boston Consulting Group,
Sydney, Australia

Alan Wong
Partner
BostonConsulting Group,
Sydney, Australia

Ginni Jain
Principal
Boston Consulting Group,
Melbourne, Australia

Trina Foo
Knowledge Senior Director - Banking
Boston Consulting Group,
Singapore


thatguydhruv