



Case Study

Unitrax AG

Transform your Client Onboarding
and Account Creation Experience



Challenge

The Client Management module is the foundation for the investor onboarding and account creation process on the Unitrax AG platform. It's also a relatively complex and time sensitive first step an operations team takes in creating a new investor and account profile. With the need to drive meaningful efficiency and improve user, advisor, and investor experience through faster processing times and error reduction, the Client Management module affords some of the greatest opportunity for enhancement.

Opportunities:

- Enhance and streamline data entry and the account maintenance process.
- Amalgamate screens and consolidate data elements.
- Engineer intuitive process flows and business rules to minimize user error.
- Significantly reduce the learning curve for new operations users.

LTIMindtree Canada Solution/Key Features

LTIMindtree Canada seized the opportunity to re-design the User Experience and transform the investor onboarding process. Guided workflows allow easy and efficient set up of new investors, accounts, and related services. Steps to create new investors and accounts in Unitrax® AG are dynamically presented based on the investor and account type selected, significantly increasing input speed and reducing risk of error. In addition to mandatory steps within the account setup workflow, the user is also able to easily select and include optional account attributes, such as systematic plan setup, deposit instructions, householding, and more.

Our Approach - UX Design

Understand the User



Challenges

- Complex user interface.
- Limited data integrity validations.
- Unintuitive navigation paths.



Goals

- Reduce time associated with repetitive activities.
- Improve data entry and business rule edits.
- Logically group related data inputs to simplify and accelerate data entry.
- Leverage Easy-to-learn interface with improved user experience.

Design for the User



Screen Rationalization & Intuitive Design

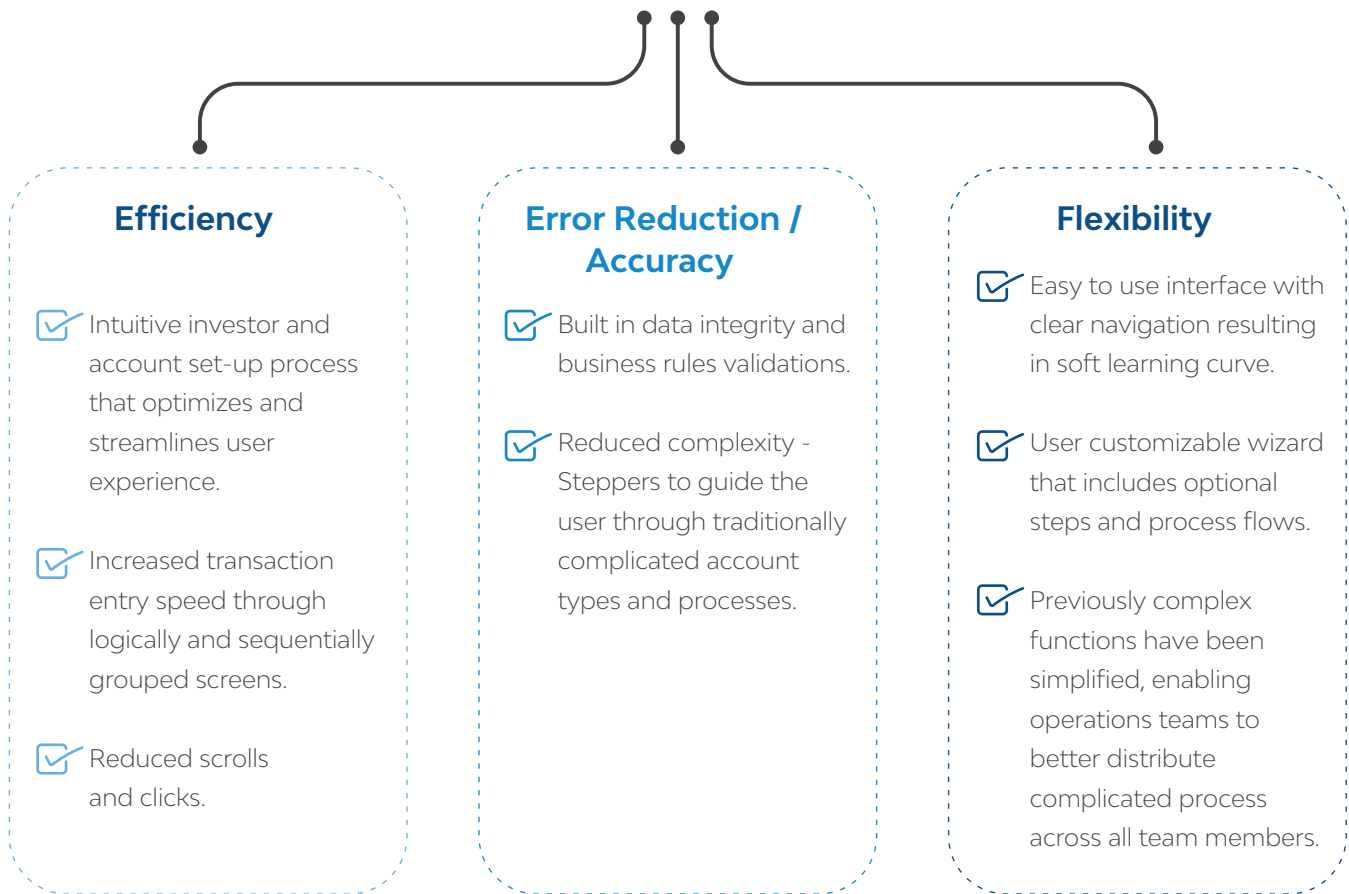
- Optimize and consolidate page layout.
- Reduce scrolling, through expandable components.



Onboarding Wizard

- Step by step, logically sequenced workflows to efficiently guide users.
- User driven experience that can dynamically include optional business processes and ability to skip non-mandatory steps.
- Built-in data validation rules.

Business Benefits



Central to our approach for the Unitrax® Transformation project is the user experience. Everything from screen design to colour palate is decided with purpose to provide an optimal experience for our customers.

- **Steve Hristov** (Head Enterprise Engineering)



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