Vantage Trading Tool

- ROLE
UX Design

- FOR
Citi

- DATE
Oct 2017

- TYPE
Desktop App

Redesign of the main platform for sales people in the trading room to follow after bonds, prices, history of trades and holdings.

As a matter of fact, most of the salespeople at the trading room don't trust the information in Vantage, dislike the interface and use it only for regulation-ruled activities. The stakeholders asked for a redesign that would return to Vantage the trust of salespeople and will handle trade opportunities better, by showing them to the salesperson in order of relevancy.

The information architecture should follow the thinking trail of the salesperson, adapting naturally to the workflow of the desk. Also, Vantage will include further information that allows for faster and better pitch creation and bonds comparison.

Approach

In order to understand better the user, the desk workflow and the needs, I visited the trading floor and researched the salespeople for 5 days, by observation and one-on-one questioning.

This phase was critical to understand what matters - and what doesn't. Some of the initial assumptions were ditched, and that left place for creating an efficient operational model, which was created together with the main stakeholders and validated by several salespeople.

On the technical side, it was decided to start with an MVP version that allows for better pitching, and a later full-blown version that would incorporate this MVP too.

Early Ideation Wireframes

At first we considered having a "monolithic" application, as opposed to a modular one that could be triggered with a toolbar. We ditched the idea very quickly, as we wanted to implement a specific workflow and have more control over the users' view.

Then, I mapped the architecture and all the screens, creating basic layouts that would be made out of reusable components.

Lastly, I iterated over the view of one bond and the information that should be presented for it.

Information Architecture (AI)

Skeleton Wireframes

The following wireframes are an attempt to map the layout and elements that should be on each page, according to the structure established above. These pages provide the best opportunities upfront, but also support the salesperson's state of mind and flow of thinking.

Main Screen

Trader Screen

Issuer Screen

Client Screen

Bond Screen – Info

Bond Screen – Comps

MVP Concept

The MVP features the most important capability - comparing one bond to other in order to create a sales pitch that can be shared for clients as a PDF.

MVP UI Design

We struggled a little on creating a dark mode to fit with all the other apps used by salespeople – we didn't want to be different, but to blend as much as possible in their workspace.

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