Putting users at the centre of platform design

Embedding user research and streamlined product development processes in a platform redevelopment

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Our customer, a global financial services group headquartered in Australia, was developing a replacement for its cloud development platform. Nearly a decade old, the platform no longer met the needs of its wide user base – 2,000 end users in multiple software development roles across four continents.

To better serve the users and the organisation today, as well as equip them to produce digital products in the future, a fully automated self-service infrastructure platform was being developed internally as a replacement. The ultimate aim was to replicate the current existing functionality while adding additional features to improve the speed of software delivery, and the reliability of the services produced as well as realise the benefits of economies of scale. To achieve this they would need a more human-centred design approach.

Equal Experts worked in an embedded partnership with the client to understand the issues with the current platform through interviews and user research before using this data to build the right features that solve the right needs in a staged delivery. A streamlined product development process, including feature prioritisation and sprint planning was also introduced as well as Continuous Integration/ Continuous Delivery and testing. Features deployed within the platform are now in use, supporting developers to be more efficient and enjoy a more user-focused experience.

More than
2,000
end users across four continents

6**weeks**
for proof of concept

8**weeks**
minimum viable product

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About the client

Our client is a global financial services group operating in asset management, retail and business banking, wealth management, leasing and asset financing, market access, commodity trading, renewables development, specialist advisory, capital raising and principal investment. Headquartered and listed in Australia, the organisation employs more than 17,000 staff.
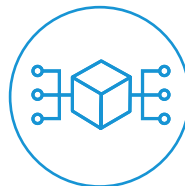
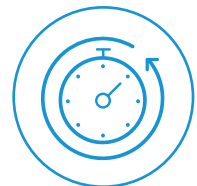| INDUSTRY	ORGANISATION SIZE	LOCATIONS	EQUAL EXPERT SERVICES	LENGTH OF PROJECT
Financial	17,000 staff	Australia	Design, deliver	15 months

Challenge

Understanding the user problems with the current platform

The internal platform used by developers to build and deploy their environments and applications was in need of replacement. The system had been quickly built by developers, for developers, with this rapid development meaning it was no longer robust enough to handle the needs of the organisation. It was outdated and difficult to use, leading to inefficiencies and frustrations for the developers relying on it every day. We were engaged to focus on a specific and significant element of the replacement cloud development platform involving the build journey, how developers deploy code to production and maintain compliance.

As part of our research and discovery with users, we identified problems that a new platform would need to address, including difficulties finding features and a lack of user feedback when the platform was interacted with, resulting in duplicate actions being logged. The platform also left users waiting to find out what stage their build was at or if it had failed, slowing down the development process for individuals and ultimately the organisation.

The huge scale of the project and the impact it would have across the organisation also necessitated careful development planning. As the platform was being built in sections, it would need to complement and work alongside the existing system, including existing APIs, during the wider platform development process until our client made the final decision to switch over entirely to the new platform. This was particularly challenging due to the new platform being built with a different tech stack.

Solution

Putting users at the heart of the design

We worked with our client on a wide-ranging UX approach to understand the needs and requirements of users. Different user groups were identified and defined – service owners, product owners and developers – with a mixture of polls and interviews used to gather perspectives on the existing platform, its features and how it behaved. A considerable amount of user journey mapping was also undertaken throughout the project and was broken down into specific stories.

Once the user research had been gathered and analysed it was vital to share this with the various teams working on the platform. As part of the project workshops, showcases and social rituals were introduced to the client's development team, providing multiple avenues for the sharing of knowledge. This helped to initiate cross-conversations across the teams, ensure consistency across the platform development and confirm that the different elements in development would work together in a holistic and user-friendly way.

A build, test, learn, cycle was also introduced into the design process, allowing an idea to be created, discussed with the various teams and adjusted based on feedback before more detailed working prototypes were created. The two-way interaction with pilot users has been instrumental in helping the team to understand the needs of users, build designs that meet user requirements and make adjustments based on their feedback.

Providing structure to the development process

We also streamlined the process by ensuring the team understood the product development roadmap and could then prioritise features and break the work down into manageable, sensible chunks. Structured processes were put into place within the team around the prioritisation of work and sprint planning. We also identified and addressed pain points in the development process, for example, the lack of a standard defined release process for features. An approach was developed to enable the team to plan around an agreed release – the team knew when a release would happen and could plan for it, test together, record information and be confident in the release. It also ensured that the stakeholders had clarity about releases and we could engage with our pilot users to test the new features and provide feedback.

The introduction of regular knowledge-sharing opportunities and a user-centred lens to the development process also ensured that stakeholders were completely engaged in the process and had opportunities to provide feedback. In particular, by engaging technical leads throughout the process, the teams could be more efficient in the creation of designs by ensuring they would be technically feasible at the outset but still user-centred.
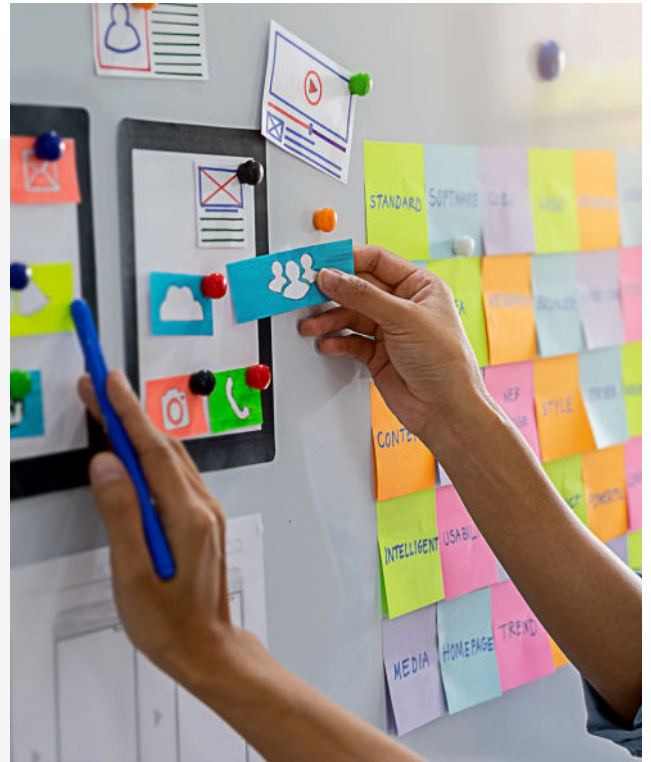
Demonstrating value through staged delivery

We first completed a six-week proof of concept to demonstrate the value to the client. This was done in a collaborative way, with our EE team – consisting of two developers, a UX designer, and a delivery lead – working alongside the platform team to deliver functionality into production. This included the ability to notify users of their build journey progress and provide an estimated completion time so users could better plan their work.

Following the success of the proof of concept, we worked with the client on a minimum viable product (MVP) to expand the functionality. Within eight weeks, further features were created, including the ability to see requests, alerts and compliance issues in context as they related to a build and see application/component dependencies which could impact a build.

A key element of our delivery was ensuring that the new platform would work in conjunction with existing APIs and other core functions. This required careful collaboration with other teams in the organisation and building rapport and communication so any changes required to APIs could be successfully negotiated and implemented.

At each stage, we worked closely with our client's developers, ensuring they were part of the delivery and were being upskilled as part of the engagement. Our work allowed them to become skilled in Continuous Integration, Continuous Delivery (CI/CD), testing and integration with existing systems and were ready to take leadership of the development after our work ended.

Results

User-friendly features enable developers to be more efficient

A focus on user experience and the encouragement of sharing UX research across the development teams enabled the platform development team to fully understand in detail the needs of users and place them at the heart of the design process.

This has led to the delivery of features within the new platform which are user-friendly and enable developers to be more efficient in their build journeys. Features developed include giving developers a better understanding of which stage their build is up to in the process and improved notifications mean that service owners are better notified of any actions they are required to take within the platform.

The staged and collaborative development process ensured that the client's platform development team gained skills at each section of the journey and felt a sense of ownership. When we rolled off the engagement, the team felt confident in their skills to continue leading the programme without EE, knowing they would be able to plan and meet identified priorities for the project.

Further reading:

Deliver A New Banking Experience With Event-Driven Architecture

From restrictive monolith to event-driven powerhouse

Xinja: Building a digital neobank from scratch

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Or do you have one just like it?

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