



GRANT TAYLOR

# PORTFOLIO

VERSION 2.5 06 FEB 2022

Welcome to my portfolio, I've chosen to show off one of the most recent projects that I'm working on right now, I hope it gives you an understanding of my thought process, and what I can do.

I've also thrown in some creative extras as well.

FIRST CASE STUDY

# ***TRADEDESK***

## ***CLIENT ONBOARDING PORTAL***

### **WHAT?**

Our team was tasked to re-develop the broker-client sign-up platform. This is a platform to get Trading broker's clients signed up and trading.

### **WHY?**

The current platform requires the client to have all their documentation and submit all the documents in one go. It wasn't mobile-friendly and it was extremely slow, which is not acceptable in this day and age. The UI was inconsistent and clunky and not up to the latest web standards.

### **HOW?**

A dedicated team was created to build this platform, consisting of 3 developers and one UX Designer, and some other members of the product team.

# USER RESEARCH

## QUALITATIVE RESEARCH.

We have a collection of brokers that we look to for feedback and are happy for their clients to test out the new platform, they're always happy to help us with suggestions or feedback. We interviewed these brokers, spending time getting to know and understand the experience from their perspective, as well as their clients. We picked up some key areas where improvements were needed.

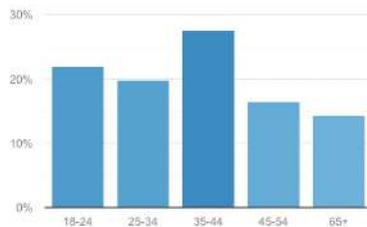
Since this was a complete redesign, we had to manage expectations, this is an MVP with improvements with each iteration. We kept the old system running on the side until the new system matched with the same features.

We used Hotjar for most of the qualitative data. Getting direct observational data in the middle of a pandemic would be near impossible. However, Hotjar showed its value, an investment that paid dividends for sure.

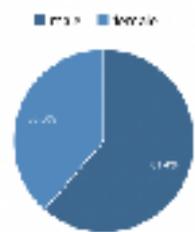
## TOOLS



### AGE



### GENDER



### INTERESTS



# USER JOURNEY MAP



Gerald is a Marketing Analyst in one of the best technology companies in the country. He is in his mid-40s. He has a family of two and has recently adopted a cat. He is very financially savvy, and he's always keeping an eye on his long-term investments. Gerald wants to get into day trading and learn how it works.

PHASES

STEPS

EMOTIONS

TOUCH POINTS

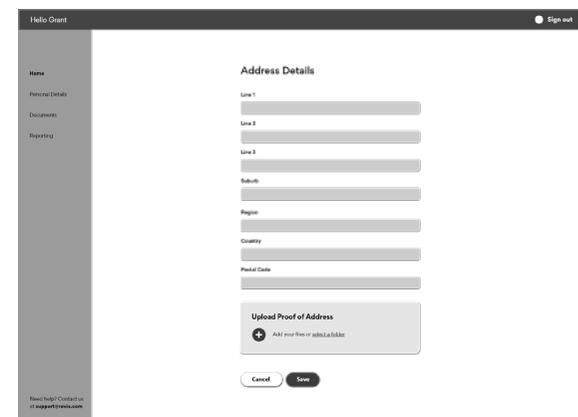
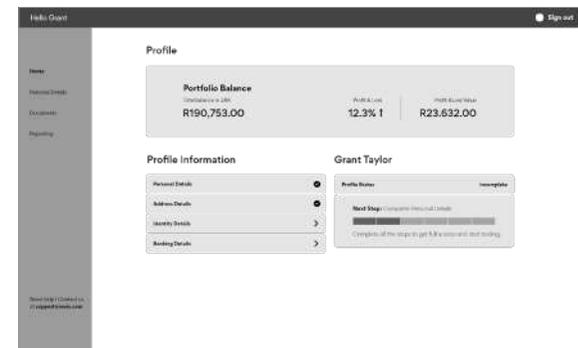
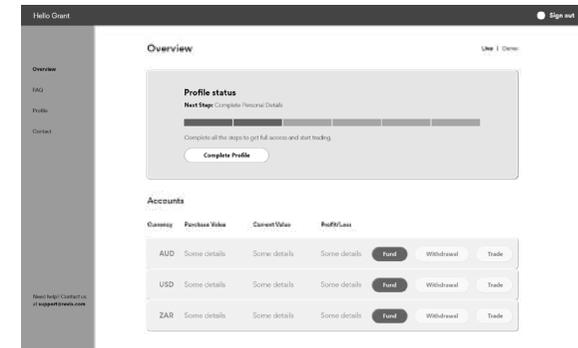
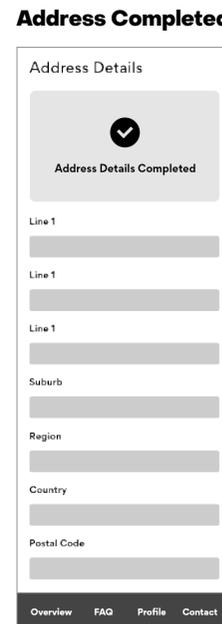
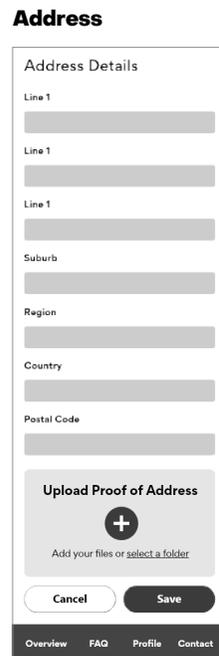
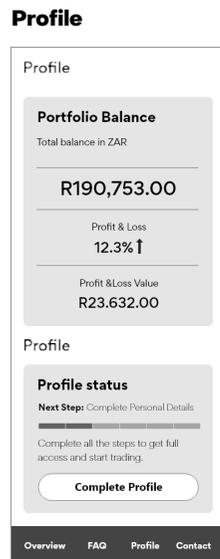
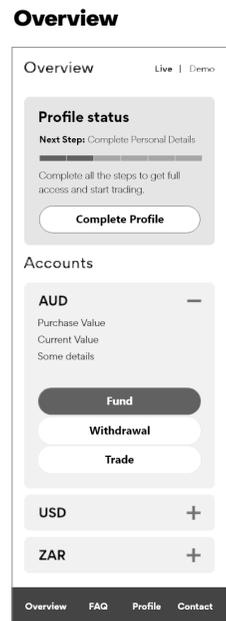
	DISCOVER	SIGNUP	ACCOUNT SETUP	VERIFICATION	ACTIVE PROFILE	
	<ul style="list-style-type: none"> <li>Search engine</li> <li>PPC ad campaign</li> <li>Mailchimp</li> <li>Word of mouth</li> </ul>	<ul style="list-style-type: none"> <li>User signs up with an email address and password</li> </ul>	<ul style="list-style-type: none"> <li>Complete personal details</li> <li>Upload documentation</li> <li>Accept terms and conditions</li> <li>Download trading platform</li> <li>Setup secure communication</li> </ul>	<ul style="list-style-type: none"> <li>Re-Upload documents if rejected</li> <li>Make a deposit</li> </ul>	<ul style="list-style-type: none"> <li>Demo Account</li> <li>Manage accounts</li> <li>Open live account</li> <li>Download reports</li> </ul>	<ul style="list-style-type: none"> <li>Withdraw funds</li> </ul>
	<ul style="list-style-type: none"> <li>Mailchimp</li> </ul>	<ul style="list-style-type: none"> <li>Verification email</li> </ul>	<ul style="list-style-type: none"> <li>Mobile verification</li> </ul>	<ul style="list-style-type: none"> <li>Deposit confirmation</li> <li>Document status</li> </ul>	<ul style="list-style-type: none"> <li>Mailchimp campaigns, updates on the platform, public holidays and other international events that may effect trade</li> </ul>	<ul style="list-style-type: none"> <li>Confirmation email</li> </ul>

# USER FLOW



# WIREFRAMES

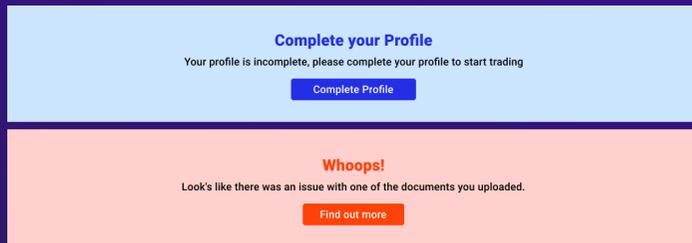
This platform update had to be biased towards mobile as the user base was young. The term "mobile-first" was thrown around, or start from "mobile" these are the popular corporate buzzwords with website builds. I've seen projects started on mobile, and when it comes to desktop, it becomes very bland and very sparse. There are a million phones and tablets. There are no standards for mobile screen sizes anymore. The application needs to function across all screen sizes and be completely fluid, whether you're using the app on the bus or in an office somewhere, the experience needs to be seamless.



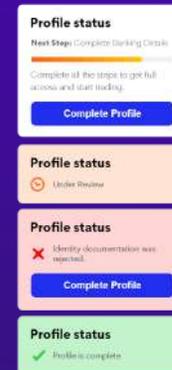
# UI COMPONENTS

## Profile Status Notifications Component

When a user lands on the home page, they're prompted to complete their profile to begin trading. Should there be an issue with an uploaded document, then this component will display the relevant error message and the component will have a call to action button where the user will be taken to the relevant page.



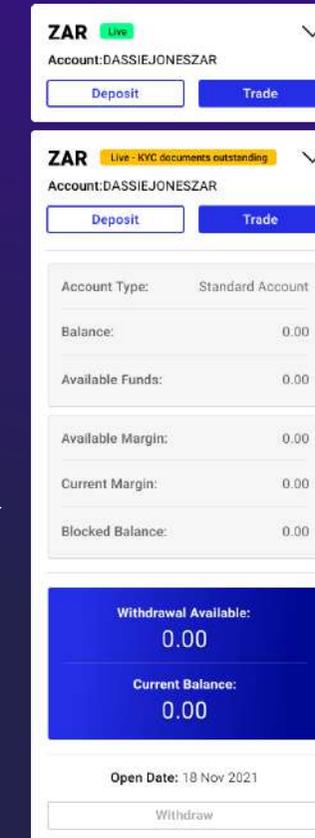
## Profile Status Component



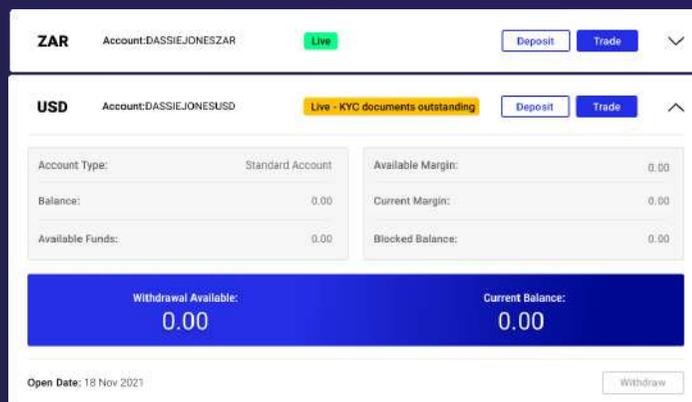
I wanted to create a simple panel or notifications section whereby the user is prompted to complete their profile so they can get trading. There is a progress bar, which is an effective way of showing progress.

There is also a link/button to the next step. There is a panel the communicates whether the uploaded documents have been accepted or rejected.

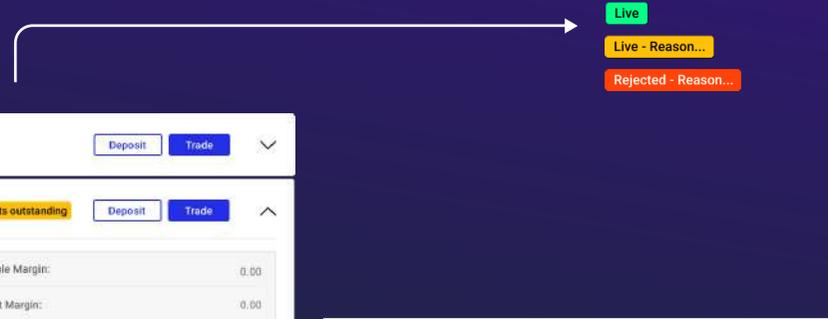
## Mobile Account Tile Component



## Desktop Account Tile Component



## Status chip states



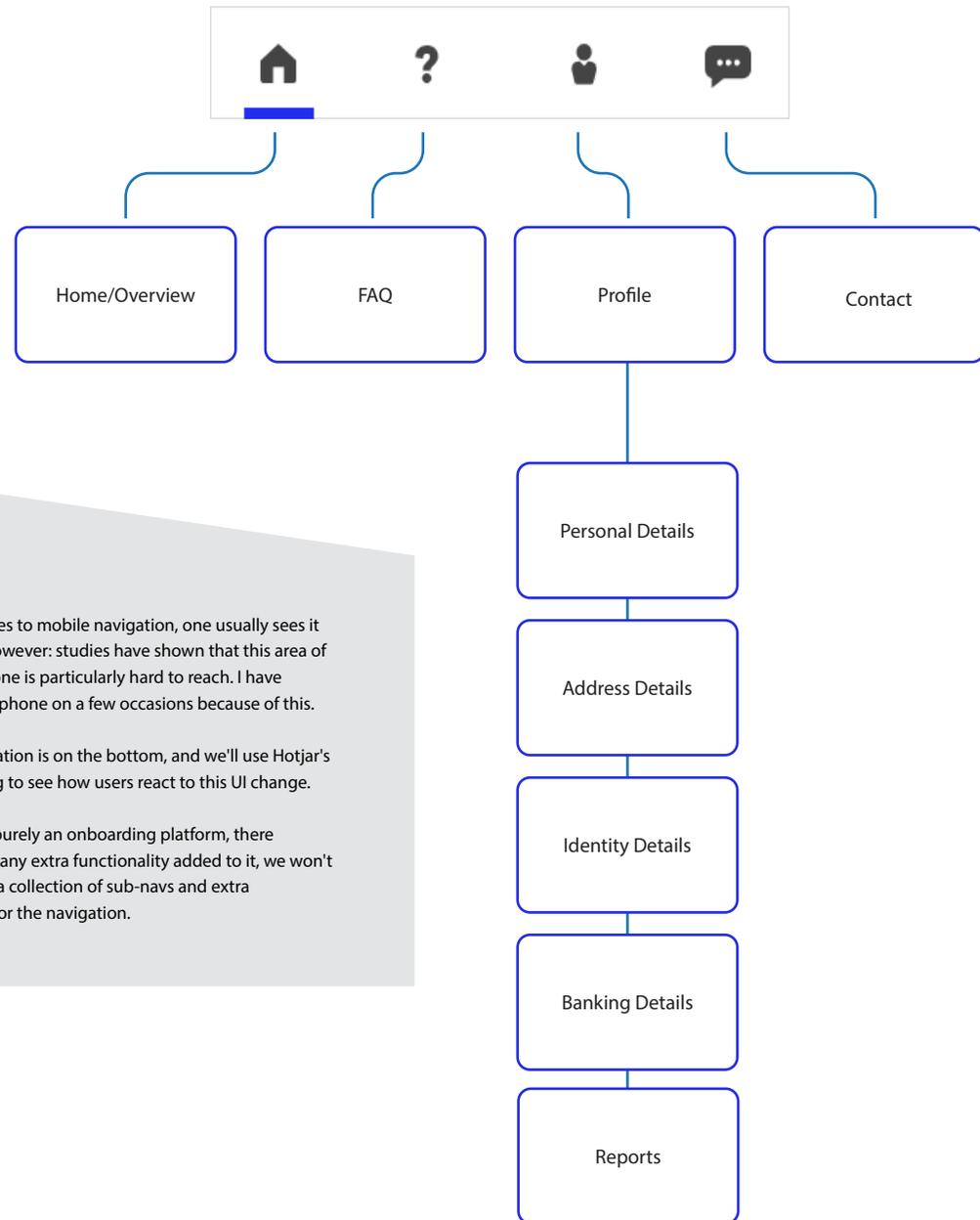
# MOBILE NAV



When it comes to mobile navigation, one usually sees it at the top, however: studies have shown that this area of a mobile phone is particularly hard to reach. I have dropped my phone on a few occasions because of this.

So the navigation is on the bottom, and we'll use Hotjar's heatmapping to see how users react to this UI change.

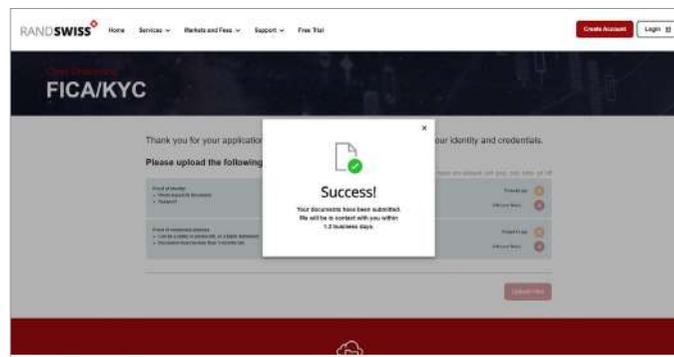
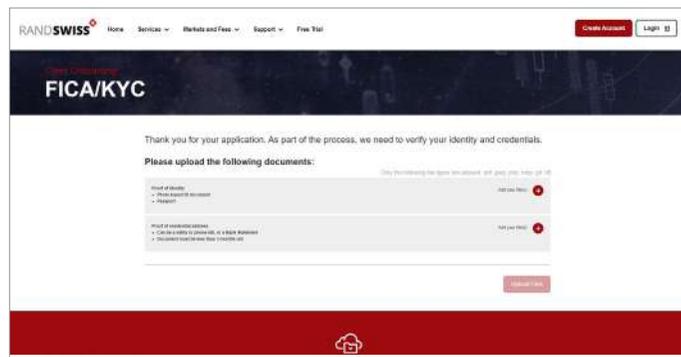
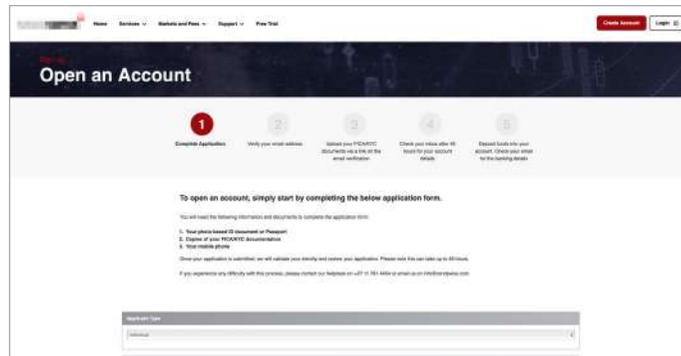
Since this is purely an onboarding platform, there shouldn't be any extra functionality added to it, we won't end up with a collection of sub-navs and extra dropdowns for the navigation.



# BEFORE

The difference between the old and new version of this platform is clearly visible. Although this platform hasn't been fully released yet, we have a select group of brokers that we are testing it out with and the feedback has been very positive.

This new iteration should make the user's life easier, which in return makes the broker's life easier as they can onboard new clients faster and more efficiently. Everybody wins.



# AFTER

After rebuilding this platform, not only have we solved the problems that users faced in the previous iteration, we created some extra functionality that will drive our users to have the best experience they can have on our platform.

- ✔ Users can now complete their profile on their own terms and when it suits them.
- ✔ The platform is a whole lot faster with no delays when retrieving reports.
- ✔ We have interactive date selection on the forms.
- ✔ We now have a profile status component that guides the user to complete their profile so they can get trading.
- ✔ We have multiple options for the user to deposit money into their account.

**TRADE DIRECT PRO**

## Account Setup

Select your Applicant type

Individual Company

### Basic Information

Title

Full Name

Mobile Number

Email Address

Preferred Method of Communication

CANCEL

PROCEED

Broker Logo

Giuseppe Rossi

### Accounts

Profile status

Currency	Account Type	Balance	Available Margin
ZAR	ACCOUNT TYPE	0.00	0.00
USD	ACCOUNT TYPE	0.00	0.00

Broker Logo

Giuseppe Rossi

### Statements

Select an account to find a statement for

Select statement to download

Statement Type	Download Link
Account Statement	Cash Flow Summary
Trade History	Position Report
Interest Statement	CFD Pricing
Equity Overview	Dividend Withholding Tax
Trade CFD Profit and Loss	Dividend Note



### Profile

#### Portfolio Balance

Total balance in ZAR: Edit

R190,753.00

Profit & Loss 12.3% ↑

Profit Value R23,462.61

#### Profile Information

- Personal Details
- Address Details
- Identity Details
- Banking Details
- Statements

#### Grant Taylor

#### Profile status

Next Step: Complete Personal Details

Complete all the steps to get full access and start trading.

Complete Profile

## SECOND CASE STUDY

# DASSIEGROWS WEBSITE



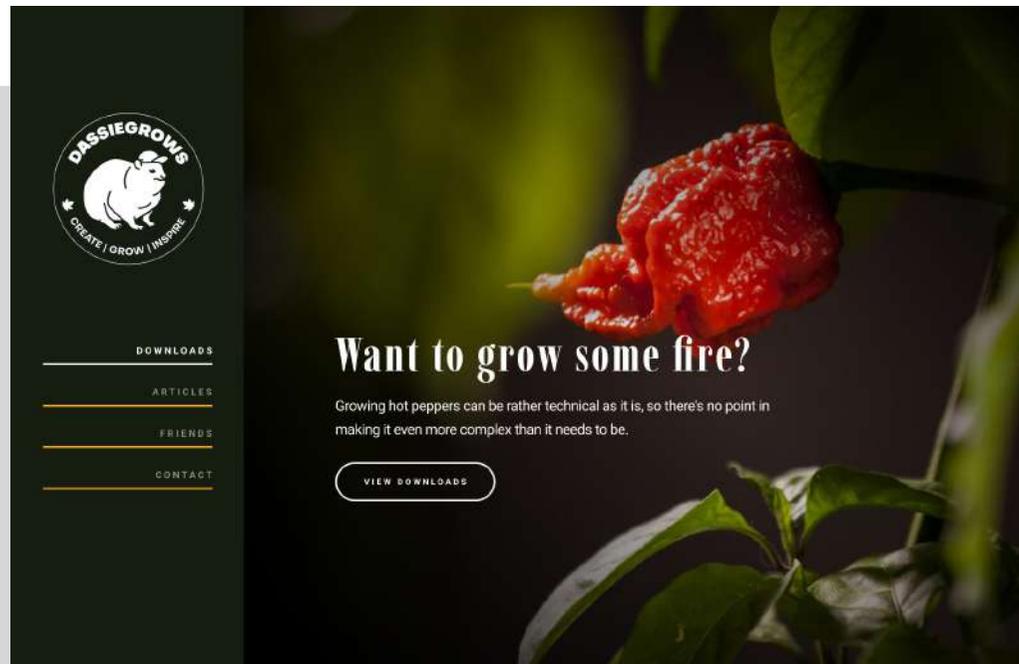
### Personal Splashpage Project

This is a personal project of mine. The goal was to create a website that would showcase my "how to grow" guides that I sell.

Traffic is funneled from Instagram, once they land onto the website, they can view some articles, purchase some grow guides, or link through to affiliates. The website gets traffic, my grow guides create revenue and my affiliates get traffic and potential business, everyone wins.

Social media is a powerful tool if used correctly. At the end of the day, this website is incredibly effective in making passive income whilst I move on to other projects.

There are many people out there who want to learn how to grow, without being overwhelmed by complicated technical nonsense, this website solves that problem.



### Beginners Grow Guide

This quick grow guide goes over the basic fundamentals of growing great organic peppers, perfect for the newbie grower, or someone just wanting to find out more about the cultivation of these fiery plants.

DOWNLOAD

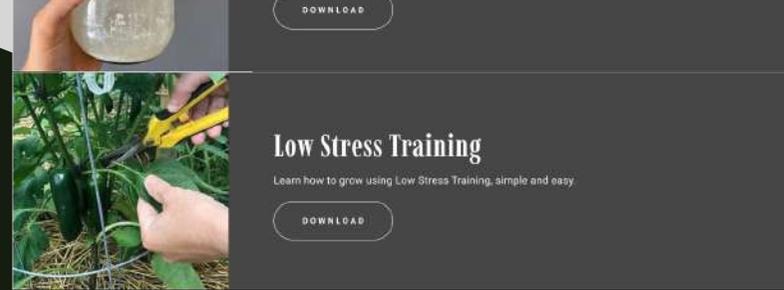
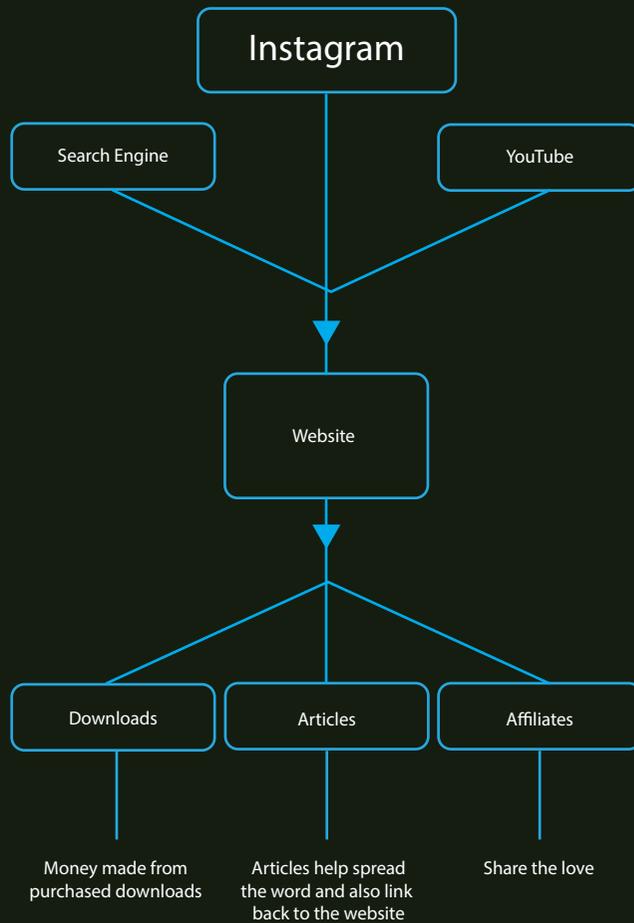


### Organic Nutrients

Learn how make your own nutrients, and get an understand of what your soil and plant need in order to be healthy and strong.

DOWNLOAD

# WEBSITE FUNNEL



## Articles

### 🔗 First Time Growing ?

Many of us will be growing or thinking about growing hot peppers for the first time, however, this can be daunting - growing a plant that you're new to.

[READ MORE](#)

### 🔗 Growing Outdoors ?

A brief breakdown of what you'll need to start your first grow outdoors, keeping to the basics, simple and uncomplicated.

[READ MORE](#)

### 🔗 Switching to organic ?

I was a hydroponic enthusiast... well it was more of an obsession to be honest, I had hydroponic systems all over the balcony and in the garage.

[READ MORE](#)

### 🔗 New worlds Hottest Pepper ?

The heat of chill peppers is measured on the Scoville scale. A Jalapeño pepper clocks in at 10,000 to 20,000 Scoville units.

[READ MORE](#)

## Friends

### 🔗 Plantmatter SA

Plant Matter is a wholesale manufacturer of South African, made Raised Grow Beds and Grow Bags.

[FIND OUT MORE](#)

### 🔗 Because Nature

Using natural materials to try create products that help you connect closer to nature

[FIND OUT MORE](#)

## Get in touch

Name\*

Email\*

Message\*

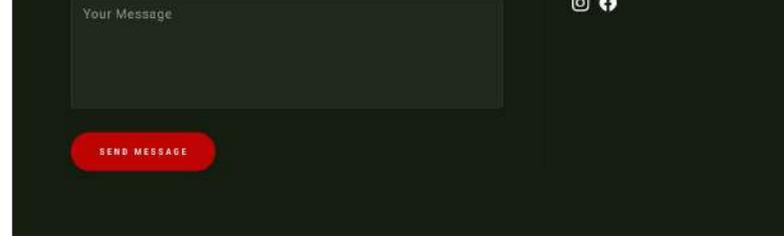
## Our details

Email

[info@dassiegrows.co.za](mailto:info@dassiegrows.co.za)

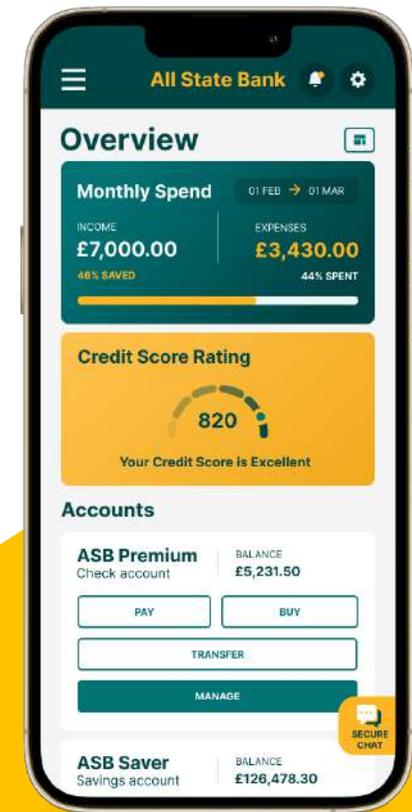
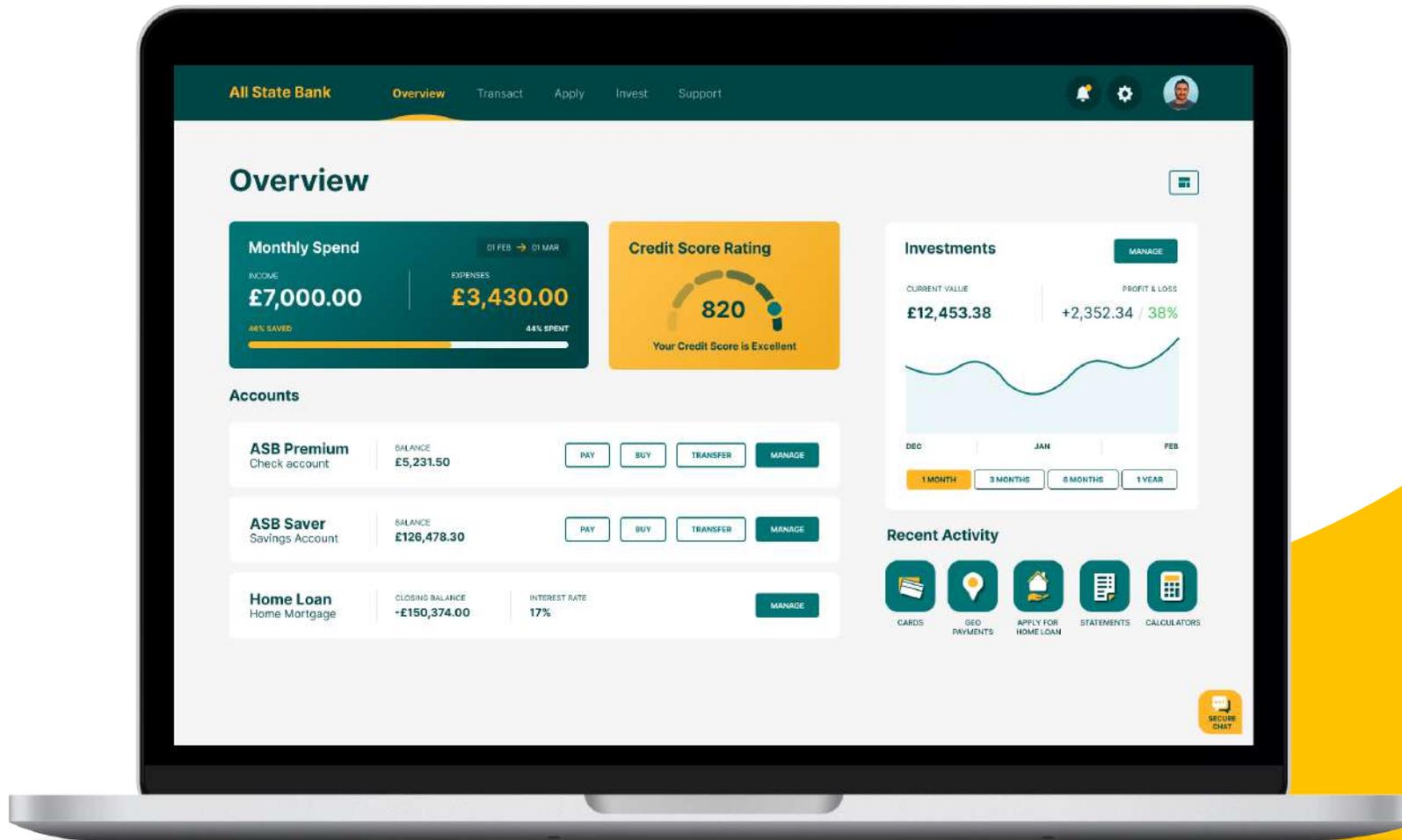
Socials





# BANK DASHBOARD DESIGN

Designing dashboards can present many challenges in that you have to remove all the clutter and only display what's relevant and ensure that it's easy to understand.



# THANK YOU FOR YOUR TIME

GET IN TOUCH



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