

Advisor Engine Case Study

AdvisorEngine is a leader in today's digital advice revolution. Its technology enables scalable growth for financial advisors, leading to enhanced client service, more long-lasting relationships, and higher enterprise value.

Initially hired to perform a few user experience enhancements in the main product, Gleikh Design & Consulting offered solutions to update and enhance the whole framework of the application starting with branding discovery and development and later moving into extending it through the user experience.

After brand equities were established, the approach to the redesign the application took multiple turns to allow for customization and more transparent use for the white label product full of features developed over the years.

The interface by design was simplified via multiple user scenarios, tested for look and feel using moodboard exercises drawing inspiration from several real world aesthetic examples. Eventually coming to a fruitful completion of 15 different themes and skins for the interface as well as 4 other ones for infographics and charting. All available to any client at a click of a button.

UI Kits were built to help business analysts and tech developers overseas put together prototypes and update the user flows as they saw fit. Pages and pages of templates were designed for their disposal to produce the products for their clients.

Meanwhile, extension of the brand was also introduced to marketing materials as well as event graphics where the product has been presented to future customers.

Quality assurance, strategic planning and brainstorming of the product and continuous marketing efforts allowed the product to come out on top of the competition.

Gleikh Design and Consulting provided services in user experience, visual design and design system development, competition audits for ux and visual, mobile and tablet application transitions, marketing efforts, quality assurance, management and work with tech vendors overseas - virtually and physical sessions, social networking and other graphics and design support.

Product successfully launched in April 2018 and keeps on evolving and living through its new features now available to all current and new customers.

KEYWORDS:

BRANDING DISCOVERY AND DEVELOPMENT, BRANDING EXTENSION AND STRATEGY FOR ONLINE & OFFLINE USE, UI/UX, VISUAL DESIGN SYSTEM FOR CONSUMER FACING APPLICATION,, MOBILE, TABLET, USER SCENARIOS, WIREFRAMING, PROTOTYPING, TECHNICAL QA, MARKETING PRINT WORK, EVENTS GFX.

