

Designing an Onboarding Application for our Driver Partner

A process of UX design and Visual design

About 21North

21North is a path-breaking concept in the Indian Auto After Sales Industry : aimed at solving the perennially existing problem of vehicle owners finding trustable service providers and sacrificing valuable personal time in managing their vehicle needs.

Introduction

Well , So I started my career as a UX Designer in 21North Europ Assistance. As I joined this company the first project knock my door is Ambassador Onboarding Application and I started looking for a reason , why this tool is necessary for the company. Since we are operating in 11+ cities in India dealing with various OEM's. We have our Ambassador helping us in providing the services in better way. This application will help our recruiter to maintain and manage all the details of our ambassador digitally. This is a data management tool for ambassador. This tool will be used in 3 ways

1. Walk-in data capture
2. Trainer Interface
3. Recruiter Interface

Problem Statement

1. As of now 21North Europ Assistance is operating 11+ cities and recruiting ambassador across india. For recruitment of ambassador all the data were used to captured using pen and paper and it was such a pain to manage large number of data physically. So, thats where we come up with this solution.
2. And also one of the major reason to come up with this solution was to track the dropout of the ambassador working with us. Since dropout of an ambassador results in huge business loss and it was a main concern for business owners. Our main aim was to figure out the way to track the reason of ambassasdor dropout so that we can find out the way to overcome it.

Insights

Considering the factors discussed above, we made sure that we had an empathetic understanding of the problem while curating the experience for the onboarding flow.

1. Difficulties in Managing Paperwork - Before the onboarding tool came up, all the data used to be captured in an excel sheet manually which is a hassle and painful process for recruiter. During the process, many times the information was lost in verbal communication due to lack of documentation. Also, it was a time taking process to maintain these data and refer to it again when needed.
2. Dropout rate of an ambassador - There are various reasons for an ambassador's dropout while the onboarding is in process or even after joining the company. To be aware of these reasons we are collecting the data from ambassadors by asking them questions about their background. Since the product is in beta and we are still trying to collect more data and identify the behaviour and background of the ambassador to overcome this issue.
3. Lack of tool to track dropout reason - A chronological way to collect information collection was needed. Specific information had to be recorded specific to each stage of the onboarding process, for easier tracking of the ambassador's onboarding process. Recording data is also important as ambassadors who do not qualify the test later come back to re-apply. It would be easier for the recruiters to track where they were eliminated and to understand if they have improved from the last time.

Product Plan

Data points such as past criminal records, family history, area of habitation, and so on are crucial data points, which we thought was necessary to profile the drivers in various categories. This would help us find the problematic category so that hiring can be stopped earlier.

This data is also very crucial for the company so that we can maintain a repository of all the walk-in ambassadors in case the ambassadors re-apply and also for identification purposes.

Our Ambassador Onboarding tool is our internal onboarding product. So to begin with the design process we started interviewing the recruiters and the stakeholders to know the edge of the problem from their perspective. After a few interview sessions with the stakeholders and recruiters we explored many scenarios through card sorting. Finally we came up with the following solution :-

Candidate
Registration

Evaluation
Dashboard

Ambassador full
Data Capture

Technician full
Data Capture

Design Process

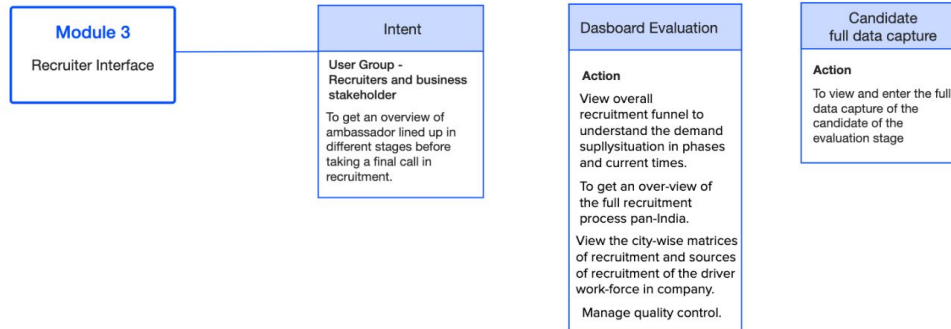
Existing Plan for ambassador recruitment (before onboarding tool)



Decision for Onboarding tool



Task Flow and User Journey



Phase 1 - Wireframes

We began with wireframing stage where we implemented the solution in a design form. During wireframing the main intention was to segregate the data, there was a huge volume of data that had to be entered. It was still challenging filling up so many fields. Also, from the UX perspective, it was important for us to make those forms interesting so that the user does not feel tired while filling them up.

Walk-in interface for ambassador

A wireframe of a welcome screen. It features a blue header with the 'North' logo. Below the header, there is a 'Welcome!' message and a sub-header 'Welcome to the portal'. The main content area contains a registration form with fields for 'First Name', 'Last Name', 'Mobile Number', 'Age', and 'Email (optional)'. A blue 'Next' button is positioned at the bottom of the form.

A wireframe of a form for address and personal information. It includes fields for 'House Number / Society Name (Current Address)', 'Street Name / Area Name (Current Address)', 'City', 'Pincode', 'Age', 'Gender', 'Highest Education', 'Marital Status', and 'All Languages Known (Multiple Selections)'. A blue 'Back' button is on the left and a blue 'Next' button is on the right at the bottom.

A wireframe of a form for applying for a role. It asks 'Applying for the role:' with radio buttons for 'Ambassador' and 'Technician'. Below this, it asks 'Do you have driving license?' with radio buttons for 'Yes' and 'No', and a 'Click & upload' button. There is also a section for 'Applicant Photo' with a 'Click here' button. A blue 'Submit' button is at the bottom.

Trainer Interface for Evaluation

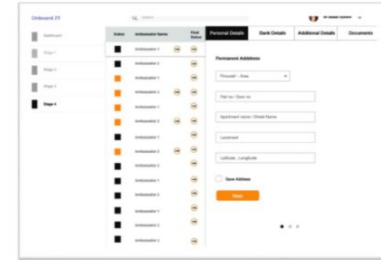
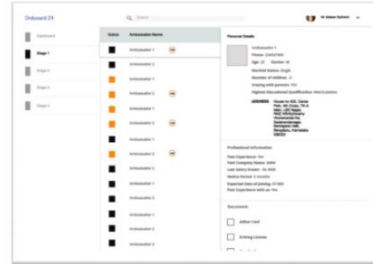
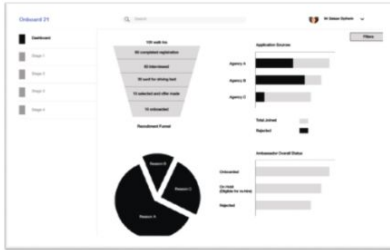
A wireframe of a driving assessment dashboard. It has a title 'Driving Assessment Dashboard' and a table with two columns: 'Candidate Name' and 'Assessment Status'. The table lists five candidates: Adam, Sri Krishna Reddy, Vinay Singh, Jiten Rana, and Bharat Kumar. Each row has a button to view results, with 'Evaluate Now' buttons highlighted in orange for Sri Krishna Reddy and Bharat Kumar.

Candidate Name	Assessment Status
Adam	View results
Sri Krishna Reddy	Evaluate Now
Vinay Singh	View results
Jiten Rana	View results
Bharat Kumar	Evaluate Now

A wireframe of a pre-test inspection form. It is titled '1. Pre-Test Inspection' and lists various inspection items with a scale from 1 to 5. The items include: 'General condition of vehicle', 'Proper operation of parking & brakes', 'Steering', 'All lighting devices and reflectors', 'Condition of tyres', 'Horn and windshield wipers', 'Rear view mirror adjustment', and 'Vehicle documents'. A blue 'Back' button is on the left and a blue 'Next' button is on the right at the bottom.

A wireframe of a driving test video evaluation form. It includes a '9. Driving Test Video:' section with a 'Browse & upload' button. Section '10. Overall Rating:' has a dropdown menu showing '4.5'. Section '11. Assessment Result:' has radio buttons for 'Pass' and 'Fail'. Section '12. Additional Comments:' has a text area with a placeholder 'Good vehicle knowledge, follow the traffic rules'. Section '13. Trainer's Signature:' has a digital signature area with a handwritten signature 'Ashish' and a 'Submit' button at the bottom.

Recruiter Interface
for recruitment process



These are just few of the important relevant screens from the wireframe stage.

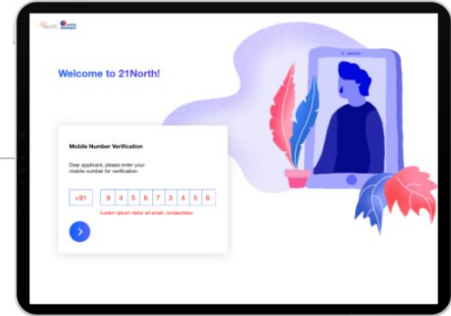
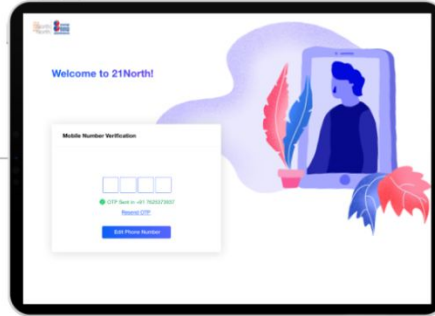
Post the wireframing stage we had a peer review session where we re-evaluated our expectations. We also had an intense discussion with our technical team on the functionality aspect and the excel documentation was updated accordingly.

Team's main motive at this point was to roll it out as soon as possible so that manual work stops and we start getting data for evaluation. This was looking like a good point for the team to kick start the project in the next level.

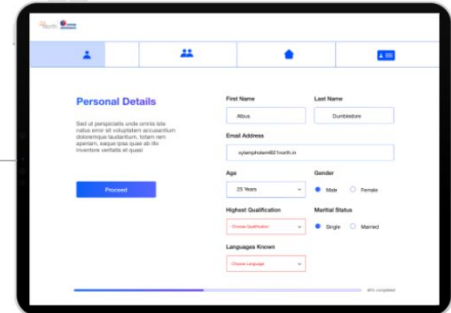
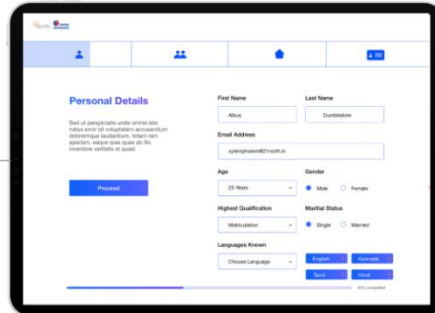
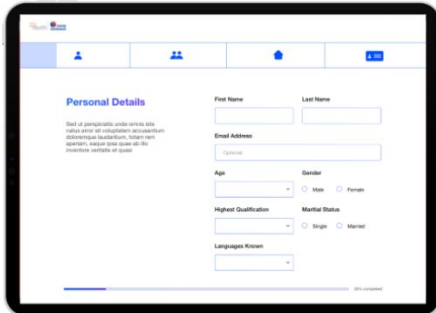
Phase 2| Hi-Fidelity Mocks

Candidate Registration Interface

Phone number verification screen



Personal details screen



Job Type Screen

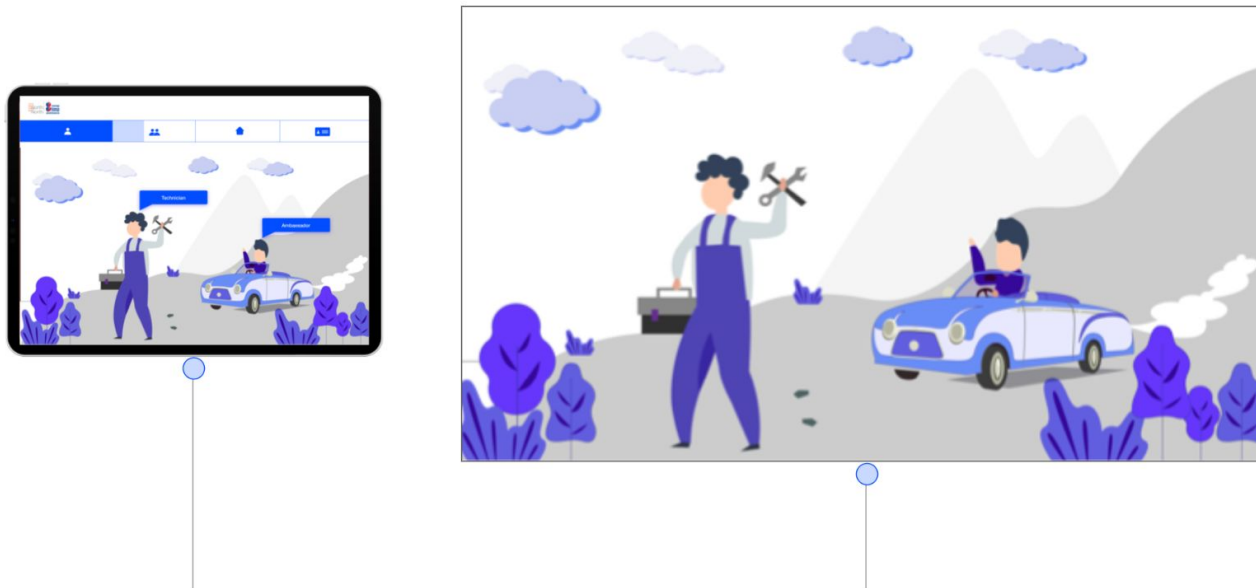
Thought Process for illustration

Since this is a tool used for onboarding of driver and technician, the idea was to present this page in creative and fun way. Coveying serious message in funny and innovative ways certainly sells and that's exactly what we are wrapping "Job type page" with to give the user a rather pleasant experience.

Pen and Paper Process



So we tried to draft different stories to show the driver and technician relationship in a one single page because we wanted them to come on a single platform to work together.



The concept here resonates with the idea of the tool. Selecting job type page tells you a story of a driver and technician. The above illustration tells a story of a driver who is struggling with his car and looking for technician. He ultimately found a technician on a road and calls him for help.

The bright colors blue, purple and grey contrast is used to maintain the consistency with onboarding tool. Simple wordplay is used in the text that is perfectly woven around the concept. It provide "Technician" and "Driver" option to select.

Overall this page serves its purpose along with being creative and definitely proves to be an escape from usual job type page that makes you go sigh!

Address details screens

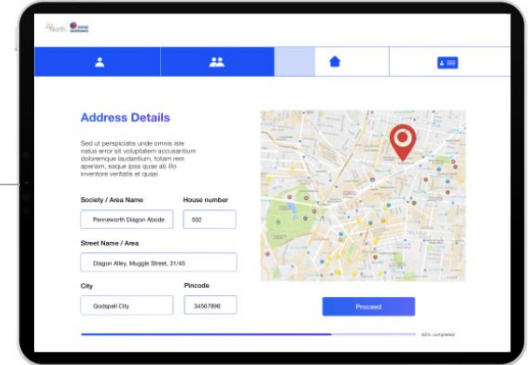
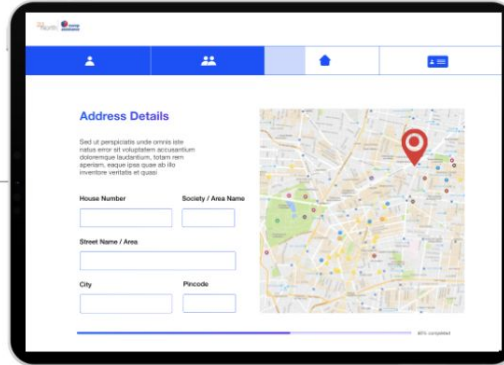
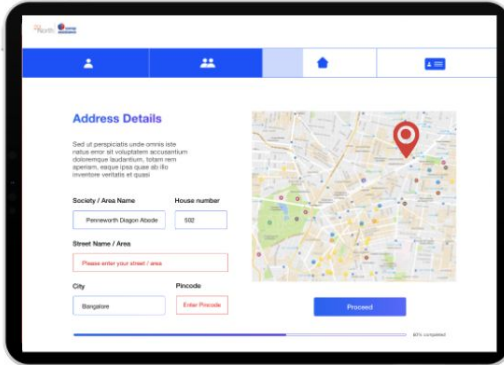
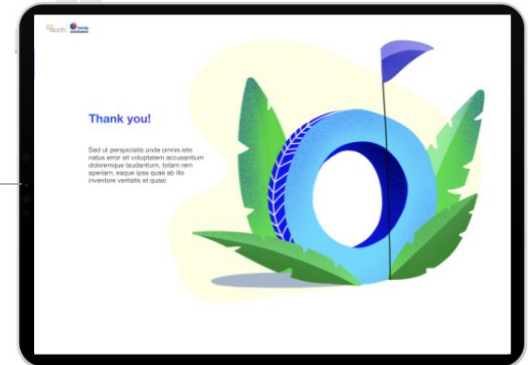
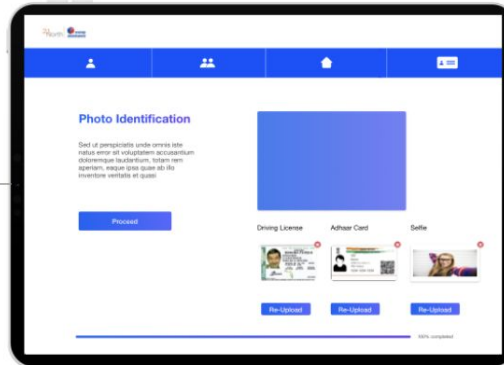
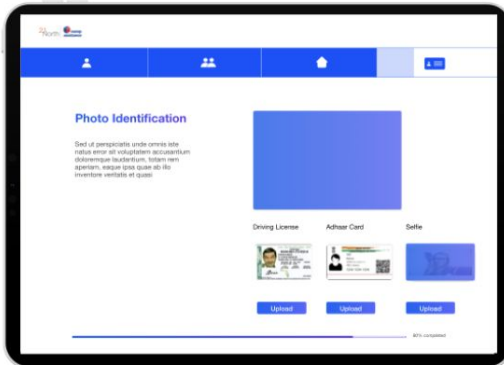
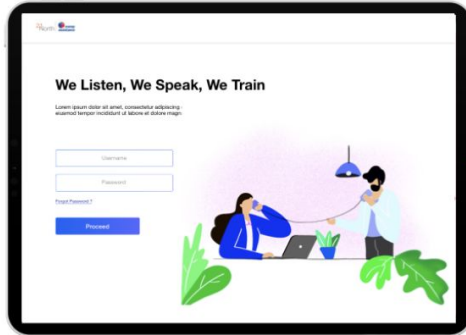


Photo identification and document upload screens



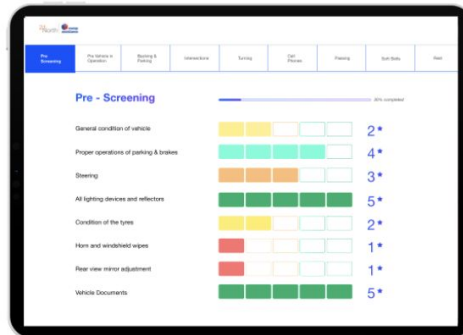
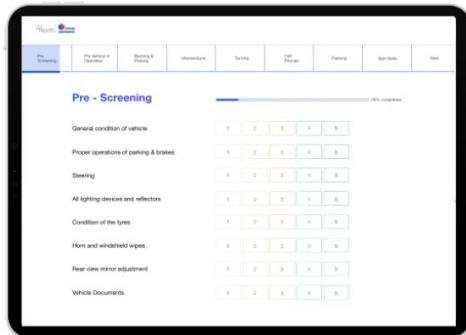
Trainer's Interface for Evaluation



Log In Page. There is no provision for sign up as the engineering team will be creating individual IDs which would be given to the trainer's.

Applicant ID#	Candidate Names	Phone Number	Status	Evaluation Result
#1234567890	Haley Singh	+91 9882704333	🔵	Pass
#1234567890	Saksham Singh	+91 9882704333	🔵	Pass
#1234567890	Raksha Hegadi	+91 9882704333	🟢	Pass
#1234567890	Rahul Maad	+91 9882704333	🟢	Pass
#1234567890	Haley Singh	+91 9882704333	🟢	Pass
#1234567890	Saksham Singh	+91 9882704333	🟢	Pass
#1234567890	Raksha Hegadi	+91 9882704333	🔴	Pass
#1234567890	Rahul Maad	+91 9882704333	🔴	Pass
#1234567890	Rahul Maad	+91 9882704333	🟢	Pass
#1234567890	Rahul Maad	+91 9882704333	🟢	Pass
#1234567890	Rahul Maad	+91 9882704333	🟢	Pass
#1234567890	Rahul Maad	+91 9882704333	🟢	Pass
#1234567890	Rahul Maad	+91 9882704333	🔴	Pass

Landing Page post log in. This is the page where the trainers can see all the ambassadors post initial onboarding. The ambassador categories in the list has been segregated in three categories based on the trainers feedback post training exercises.



Rest Details tab

The screenshot shows a web interface for a 'Rest' test. It includes a navigation bar at the top with tabs for 'Home', 'Candidates', 'Resting & Control', 'Rest', 'Test', 'Results', and 'Test Date'. The main content area is titled 'Rest' and contains the following sections:

- 'Doing test photographs' with a 'Review & Control' button.
- 'Overall Rating' set to '4+' with a 'Reset' button.
- 'Additional Comments' with a text input field and a placeholder 'Please use additional comments'.
- 'Testers Signature' with a text input field and a placeholder 'Please put your signature'.
- 'Result' with 'Pass' and 'Fail' buttons and a 'Next >' link.

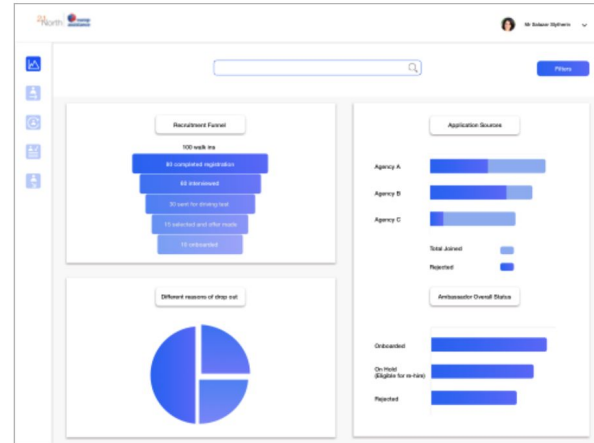
This screenshot is similar to the previous one but shows a different state of the 'Rest' test interface. It includes a camera icon next to the 'Doing test photographs' section. The 'Additional Comments' field contains a warning message: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.' The 'Testers Signature' field contains a handwritten signature.

RECRUITER'S INTERFACE FOR FINAL RECRUITMENT PROCESS

The screenshot shows a web interface for a recruiter. It features a search bar at the top with the text 'All Candidates'. Below the search bar is a table with the following columns: 'Applicant ID's', 'Candidate Names', and 'Phone Number'. The table contains 10 rows of candidate data.

Applicant ID's	Candidate Names	Phone Number
#12345678966	Happy Singh	+91 98627524333
#12345678965	Sachin Singh	+91 98627524333
#12345678965	Rishav Hingot	+91 98627524333
#12345678965	Rahul Modi	+91 98627524333
#12345678965	Happy Singh	+91 98627524333
#12345678965	Sachin Singh	+91 98627524333
#12345678965	Rishav Hingot	+91 98627524333
#12345678965	Rahul Modi	+91 98627524333
#12345678965	Rahul Modi	+91 98627524333
#12345678965	Rahul Modi	+91 98627524333

Dashboard Analytics Design



Gathering data is easy but leveraging it to create impactful insights is what makes it powerful. A dashboard exactly serves that purpose. A dashboard is not simply an amalgamation of graphs but it is a story told through data.

The above dashboard is specially designed for the stakeholders where they can see all the data in one go. The data were shown with the help of funnel, pie chart and bar graph. Since pictorial images help user to understand more clearly than the words do.

In this dashboard, we included few major categories like Recruitment funnel which is giving the clear idea of how many ambassador walk-in for the interview and how many really got selected after the process.

With help of pie chart, it can be easily find out the reason why ambassador were dropping out.

Also, using the bar graph it is easy to find out the overall status of ambassador.

Still there are many ideas to work and improvise on the dashboard in order to provide modified version. We are working towards it to make it for colorful and user friendly.

Working on Visual Design

Primary Icons



The above icons are specially designed for dashboard. All the 5 icons are clearly serving its purpose of showing different stages of the recruitment of drivers.

The below icons are the disable version of the same icons showing the stages



The above icons are specially designed to use in a progress bar showing different forms to be fill step by step. The icons are used in 2 ways to show the active and inactive stages.

Secondary Icons



Usability Testing

Just after a release, we conducted a usability testing session with some of our stakeholder who are going to use it on a daily basis. We asked them to use the tool right from the beginning and also asked to perform a task, while they were doing so, we were observing their interaction and behaviour thoroughly.

Soon after they finished using the tool and completed the task,

We asked them about their experience, If it feels easy for them to perform the task?.. How does it feels?.. Is it still a painful process?

We recorded it all, below is the link of test videos —

[Test Video Links](#)

What I Learnt

By the end of this project I learnt various UX methods like Ethnography in which I studied about the group of targeted user, User interview, Card sorting. Well I spent a lot of time on visual design and it came with lot of learning. I tried to incorporate all my learning during UX research into visual design and crafted this product.

Future Trajectory of the Product

For analyzing data, a large volume of data is required. Currently, data is being migrated from excel sheets to the database. Once, migration is complete and enough data is available, the dashboard can provide a variety of information such as driver behavior data, whether not a driver can be hired — thereby saving costs on the hiring process, the effectiveness of recruitment agencies, and so on. Currently, this product is on beta testing.

Future Directions

Below, I list future directions I could take the deliverables here if I were a Visual designer here :

Understand more about Onboarding Tool by talking to our recruitment specialist, all the stakeholders, and via user research → visual design and including pictorial graphics that resonates with them

Continue iterating on the Dashboard Analytics and wireframing/building hifi mocks for the same.

Designing and modifying the dashboard analytics graphs and funnel visually and more from ux perspective.