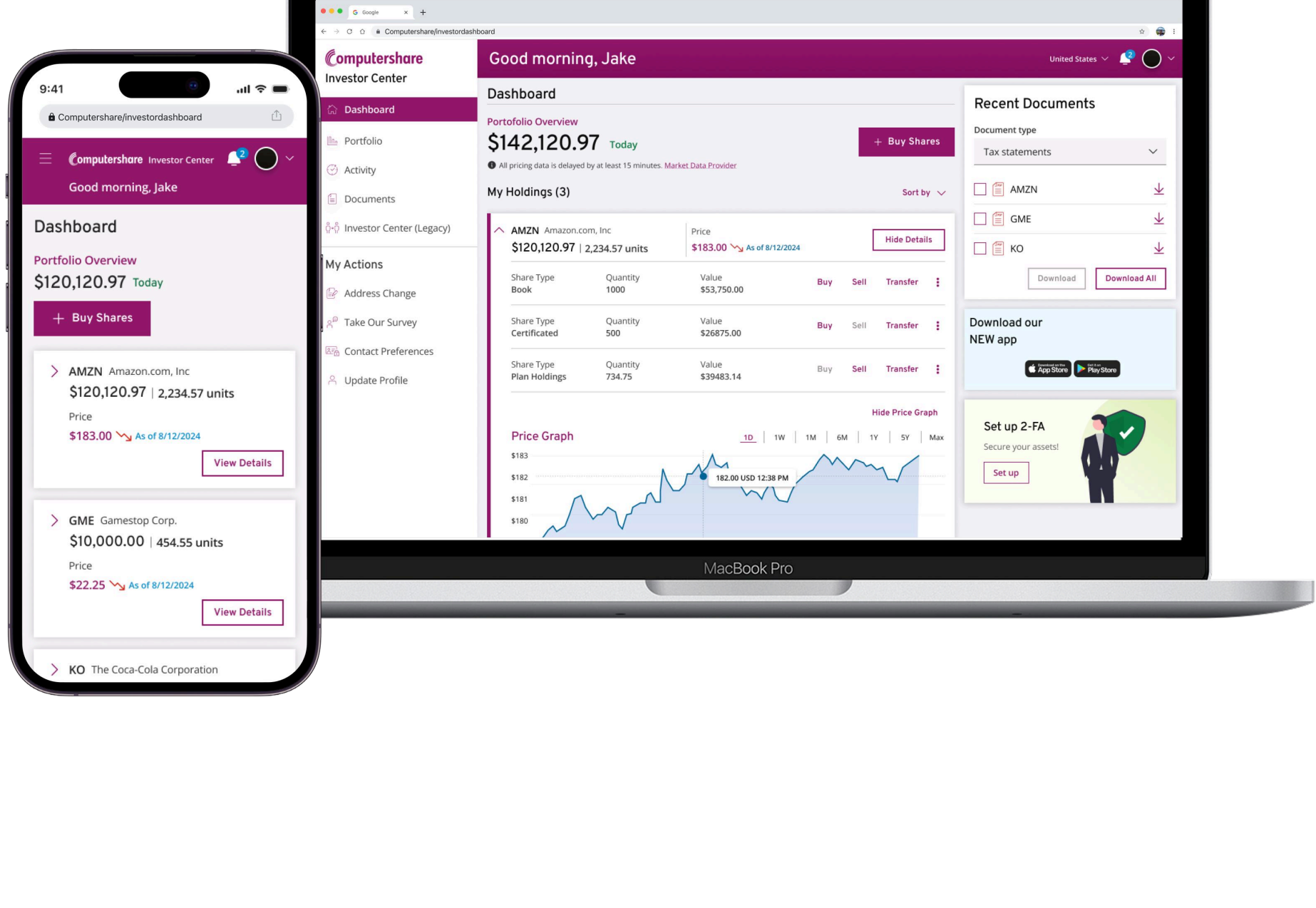


Computer Share Investor Center Dashboard

The Computershare Investor Center Dashboard serves as the central control panel for investors managing their holdings, dividends, documents, and transactions. The dashboard had grown cluttered and outdated, with critical features buried under poor navigation and non-responsive design. Our team led the UX redesign to create a simplified, intelligent, and mobile-optimized dashboard experience tailored to diverse investor needs.



UX Case Study

Duration:

5 Months

Role & Responsibility

- UX Lead
- Feature Scoping
- Research
- Interaction Design,

Visual Design

Prototyping

Tools

- Figma

Project Summary

- The Computershare Investor Center Dashboard serves as the central control panel for investors managing their holdings, dividends, documents, and transactions. The dashboard had grown cluttered and outdated, with critical features buried under poor navigation and non-responsive design. Our team led the UX redesign to create a simplified, intelligent, and mobile-optimized dashboard experience tailored to diverse investor needs.

Project Objectives

- Redesign the dashboard for clarity, relevance, and personalization.
- Help investors quickly view and act on holdings, messages, and alerts.
- Support WCAG AA accessibility and mobile responsiveness.
- Increase user engagement and reduce dependency on customer support.

Discovery & Research

User Interviews & Feedback

- We interviewed retail and institutional investors to understand:
 - Their most common tasks (e.g., checking share value, downloading documents)
 - Frustrations with the current dashboard
 - Preferred behaviors across mobile and desktop

Findings

- Users were overwhelmed by information overload.
- High-priority actions (e.g., account notifications, dividend payments) were buried.
- 40% of traffic came from mobile devices, but mobile UX was subpar.
- Users desired a customizable experience.

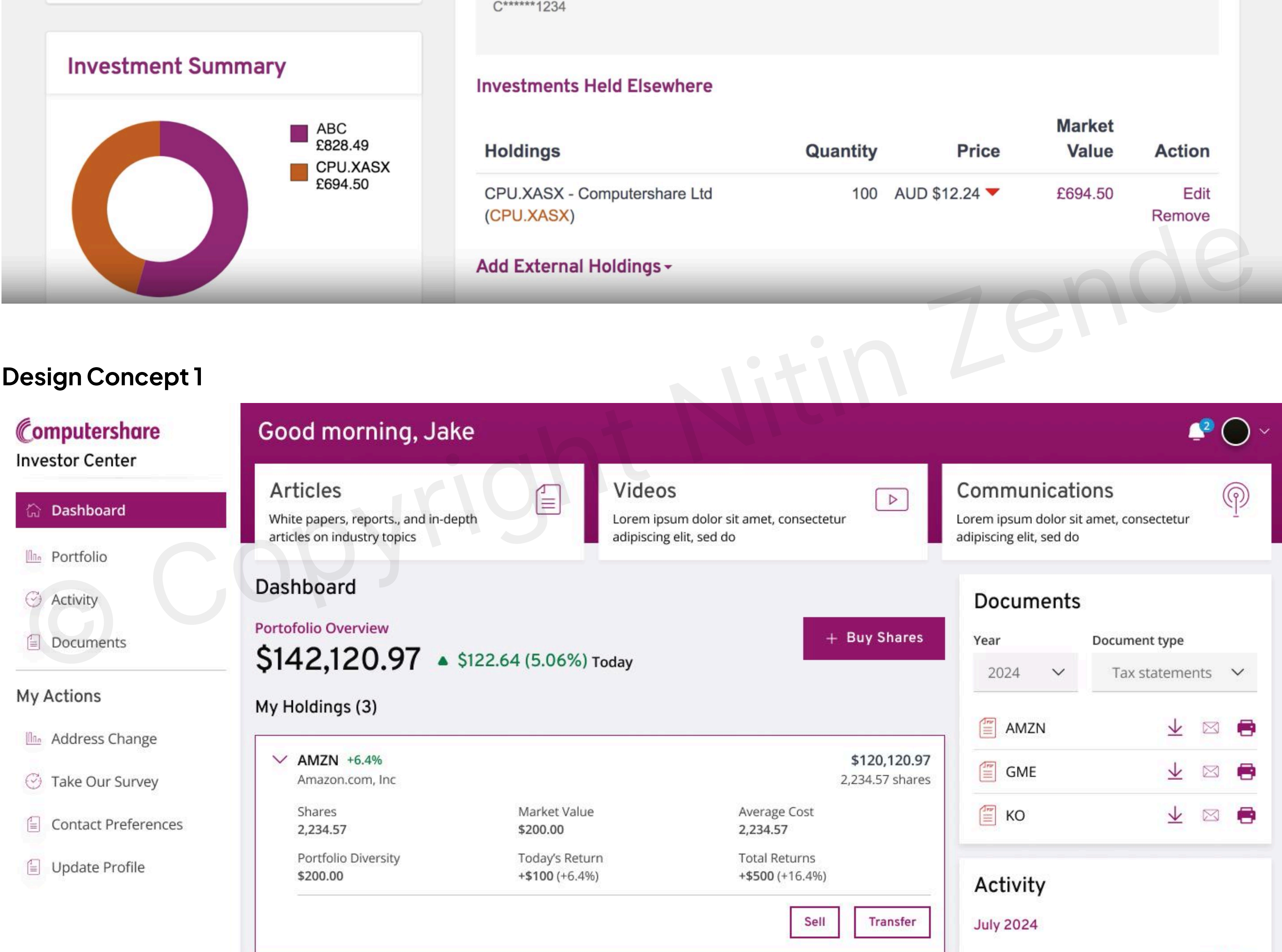
Design Strategy

What We Changed

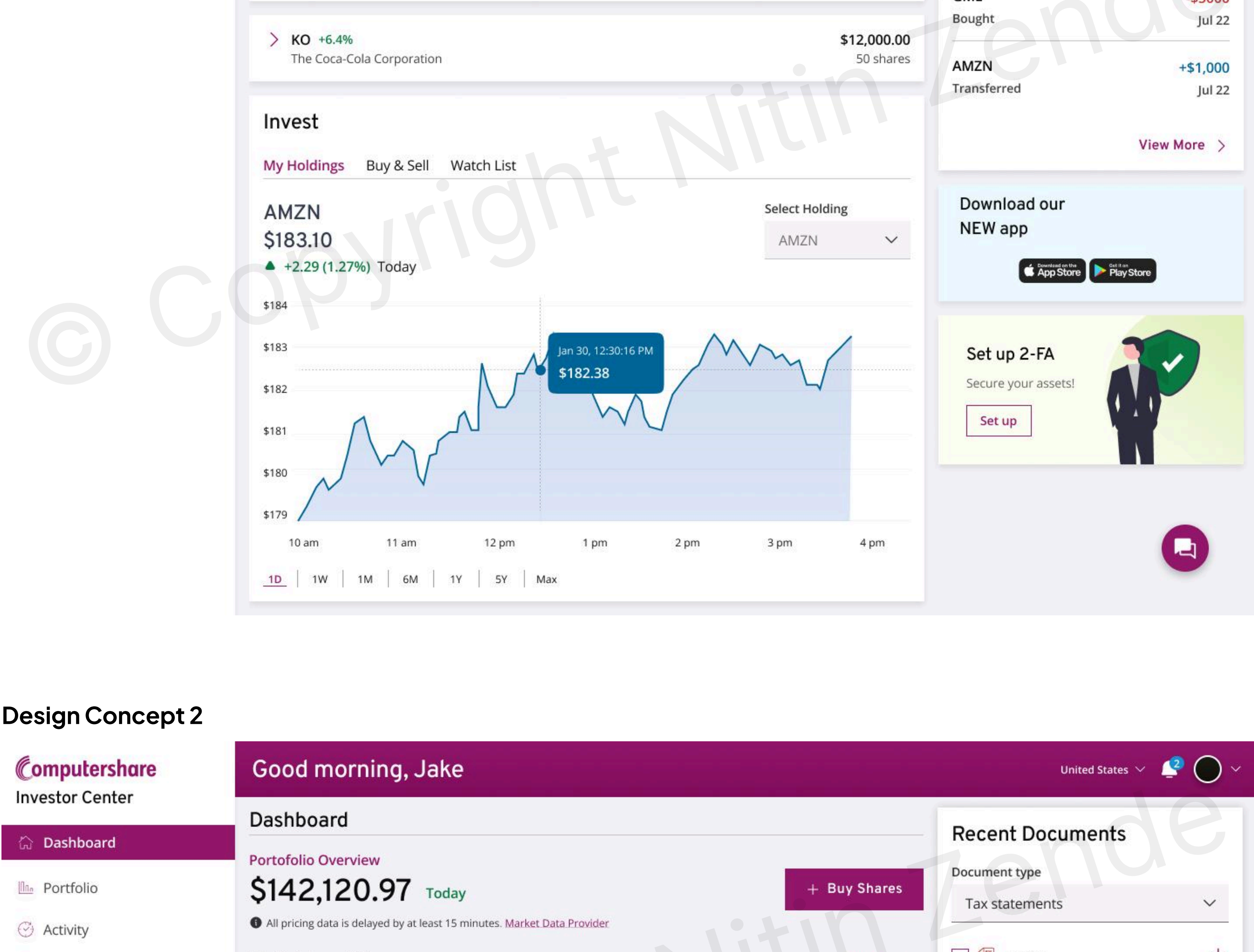
- Information Hierarchy Revamp
 - Created a card-based layout for modularity and prioritization.
 - Key data surfaced at the top: holdings summary, pending actions, recent activity.
- Personalized Widget System
 - Users could customize dashboard widgets for what mattered most to them (e.g., “My Holdings”, “Tax Documents”, “Alerts”).
- Smart Notifications & Alerts
 - Designed a unified alert center with contextual actions (e.g., “Update bank info”).
- Mobile-First Experience
 - Fully responsive layout with optimized spacing, touch-friendly buttons, and reduced visual clutter.
- Accessible UI
 - Color contrasts, keyboard navigation, and screen reader compatibility tested to meet WCAG 2.1 AA standards.

Proposed Design Solution

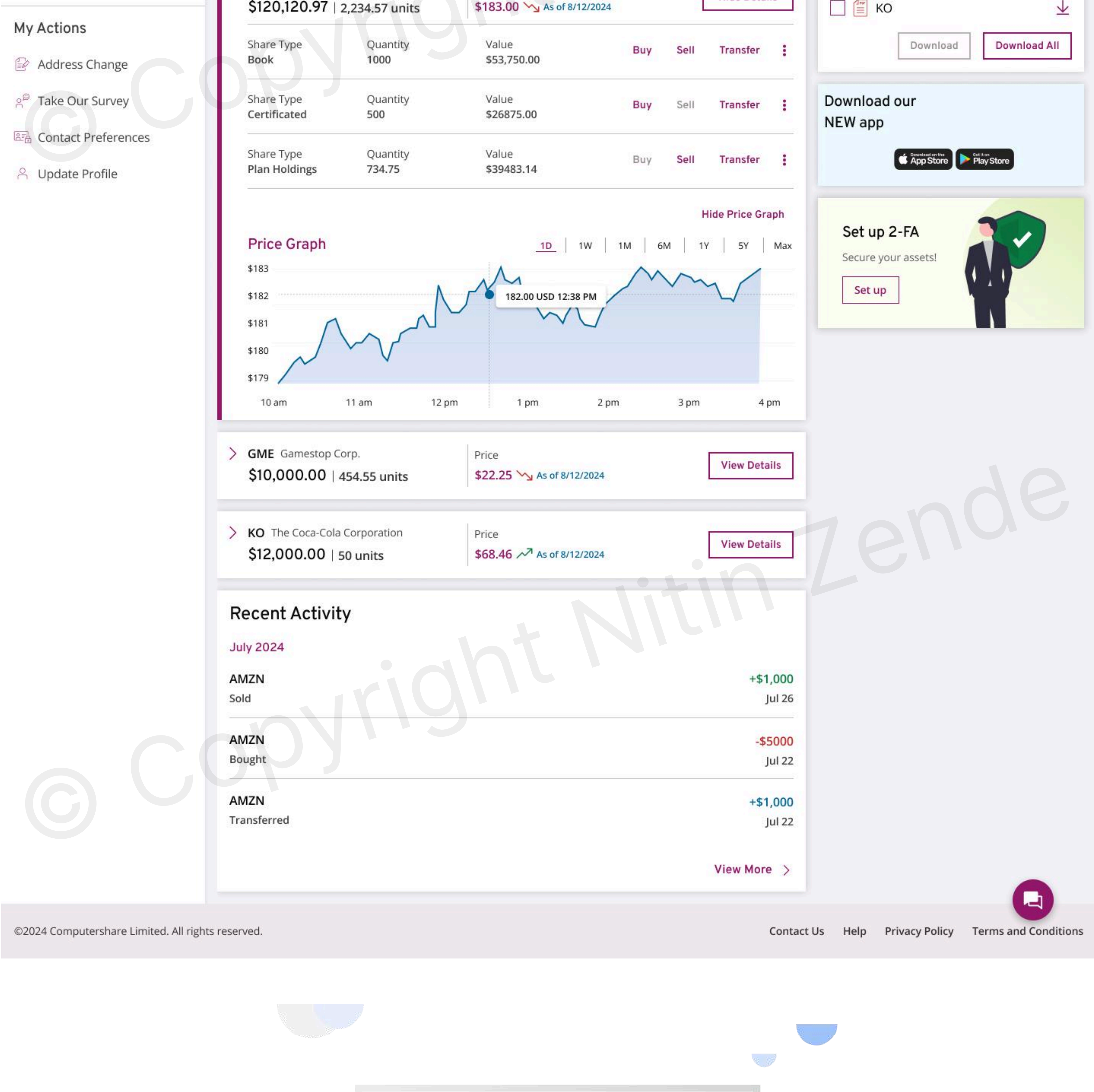
Before



Design Concept 1



Design Concept 2



Design Execution

- Tools Used:**
 - Figma: Wireframes, High-Fidelity UI, Interactive Prototypes
 - JIRA & Confluence: Agile Story Grooming, Collaboration
 - UserTesting.com: Moderated remote testing
 - Google Analytics: Heatmaps & task flow analysis
- Deliverables:**
 - Dashboards wireframes (low to high fidelity)
 - Interactive prototype with 4 use cases
 - Design system components for cards, modals, alerts
 - Accessibility audit documentation

Usability Testing

Scenarios Tested:

- Viewing portfolio performance
- Downloading a tax document
- Acting on account alerts

Results:

- +42% task success rate compared to old dashboard
- 37% drop in time to complete a transaction
- High marks for clarity, focus, and speed

Developed User Personas

Computershare

Investor Center

Susan Mitchell

FINANCIALLY-SAVVY PROFESSIONAL, CORPORATE ADMINISTRATOR

About

Susan works in the finance department of a mid-sized company and manages employee stock programs. She also uses the Investor Center platform to track her personal investments, dividends, and shareholder documents.

Goals

- Easily view all her investments across multiple accounts in one place.
- Download tax documents and statements quickly.
- Receive real-time updates about corporate actions (e.g., dividend payouts, stock splits).
- Manage employee stock options for her company through the portal.

Pain Points

- Finds the current dashboard cluttered and unintuitive.
- Struggles to find key documents without using search every time.
- Mobile version lacks functionality and clarity.
- Doesn't always understand next steps in workflows like transferring shares or updating account info.

Motivations

- Wants a simplified and centralized view of financial assets.
- Prefers fewer clicks and a logical layout to save time.
- Values security, accuracy, and trust in financial platforms.
- Appreciates visual summaries (charts, alerts, action buttons) for faster decision-making.

AGE

39

OCCUPATION

Financially-savvy Professional, Corporate Administrator

LEISURE

Reading, Swimming, Gym

LOCATION

Dallas, TX

- Simple User Journey:
 - User lands on personal loan page.
 - GenAI widget says: “Hi! Need help finding the best personal loan option?”
 - User chats: “I’m looking to borrow \$15,000 to consolidate debt.”
 - GenAI explains options, suggests checking eligibility.
 - Landing page now reflects “Great rates for debt consolidation loans.”
 - CTA updates to “Get prequalified in 2 minutes.”

PROJECT OUTCOMES

The redesigned Computershare Investor Center Dashboard delivered measurable improvements in both user experience and business efficiency:

- +42% increase in task success rate, enabling users to complete key actions faster and with less confusion.
- 30% reduction in dashboard-related customer support tickets, indicating a more intuitive and self-service-friendly design.
- 26% reduction in mobile bounce rate, reflecting the effectiveness of the new responsive and mobile-first layout.
- Improved customer sentiment captured through post-launch surveys, with 88% of users reporting the new dashboard as easier to use.
- The modular, card-based dashboard design was adopted as a standard UI framework for other product interfaces at Computershare, enabling faster development and visual consistency across the platform.

The project successfully aligned with strategic goals to modernize the platform, enhance investor satisfaction, and increase digital engagement, positioning the dashboard as a core driver of long-term platform scalability and user loyalty.