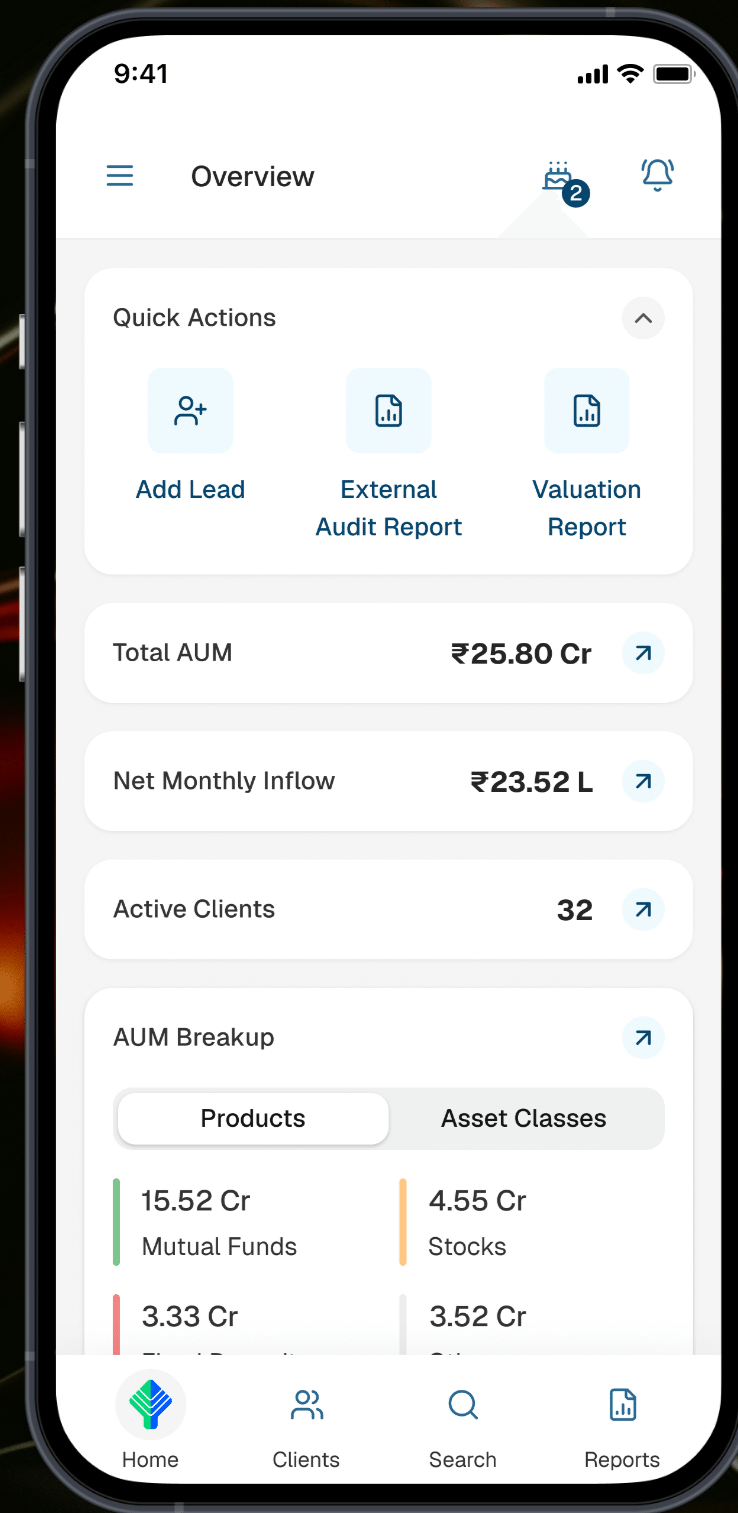


Partner app

Mobile-first redesign that increased active advisors by 68%



Staff Product Designer (Lead)

7 months · Flutter

The numbers tell the story

Advisors work in the field, not at desks.
The original platform was built for desks.
Rebuilding for mobile changed everything.

3,700

↗ +68%

Active IFAs, up from 2,200

2,900

IFAs on the mobile app

200+

Daily active IFAs

PROBLEM

Built for desktop, used on mobile

Only 2,200 of 10,000+ IFAs were active.
Most relied on a mobile web version of a
desktop portal.

Lead capture

Onboarding was fragmented and slow
- advisors couldn't complete key
steps without switching to desktop.

Business metrics

Key performance data was buried
deep in the portal - inaccessible for
advisors checking numbers on the go.

Portfolio view

Client holdings weren't scannable on
mobile. No quick actions, no clear
hierarchy - just a scaled-down
desktop table.

Competitive pressure

Rivals like AssetPlus were already
mobile-first. The gap between
platform capability and advisor
expectations was widening fast.

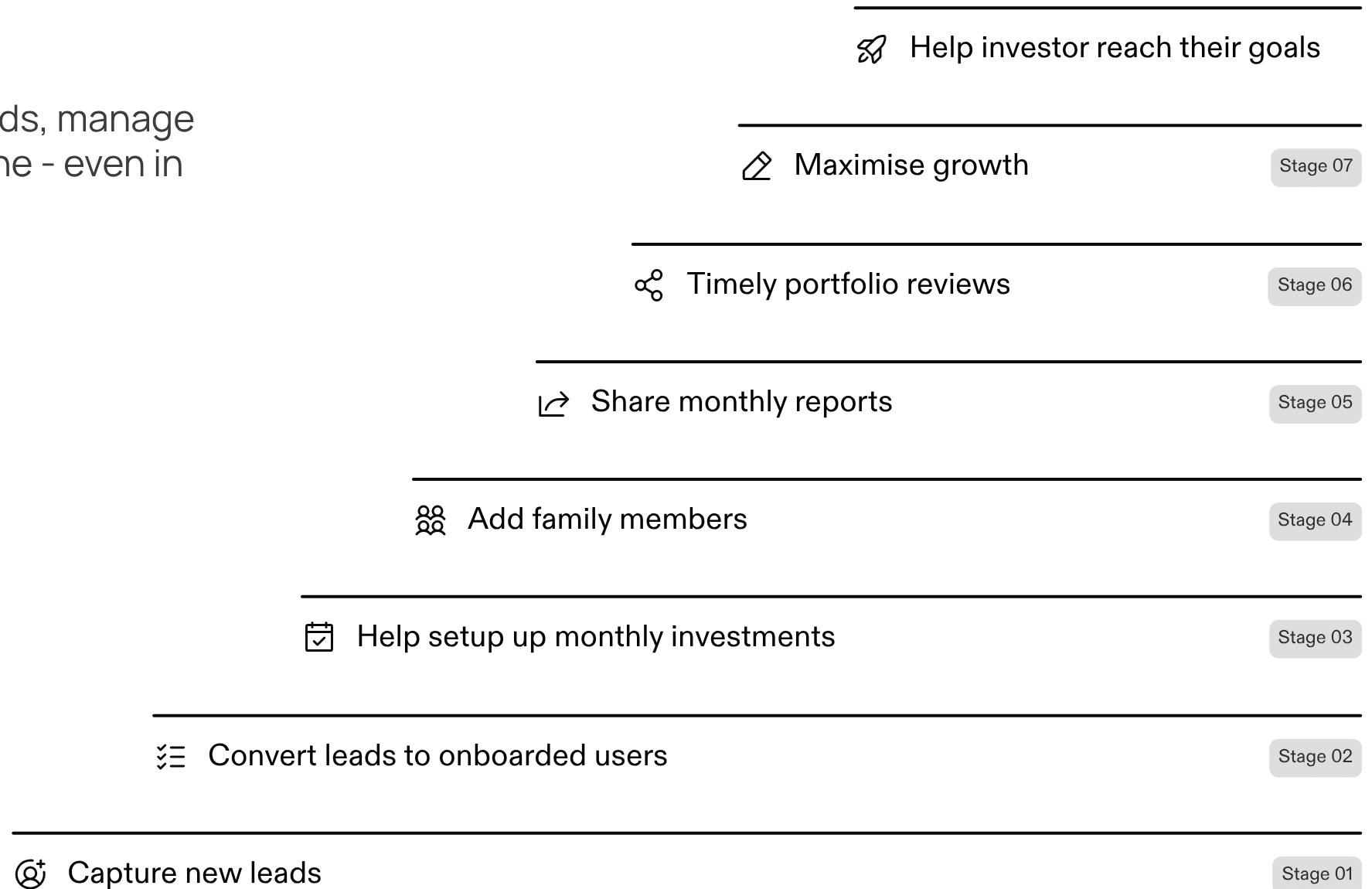
OPPORTUNITY

Meet advisors where they work

A mobile-first platform for IFAs to capture leads, manage portfolios, and run their business from a phone - even in low-connectivity environments.

MY POINT OF VIEW

Advisors don't need more features, they need fewer, faster workflows. The goal wasn't to replicate the desktop experience, but to redesign how advisory work happens on-the-go.



Platform scope

Five core areas of transformation

Dashboard

Business metrics, SIP book, AUM, and net flows at a glance

Leads and onboarding

Capture and convert clients on the go, from anywhere

Investment workflows

Cart, fund selection, and quick-action transaction flows

Reports

SOA, valuation summaries, and transaction history

Smart nudges

Engagement prompts and timely reminders for advisors

A phased approach over 7 months

Months 1-2

Phase 0: Foundation

- Core dashboard with key business metrics
- Validated with real advisor usage

Months 3-5

Phase 1: Expansion

- Expanded features based on real usage data
- Iterated on gaps from Phase 0

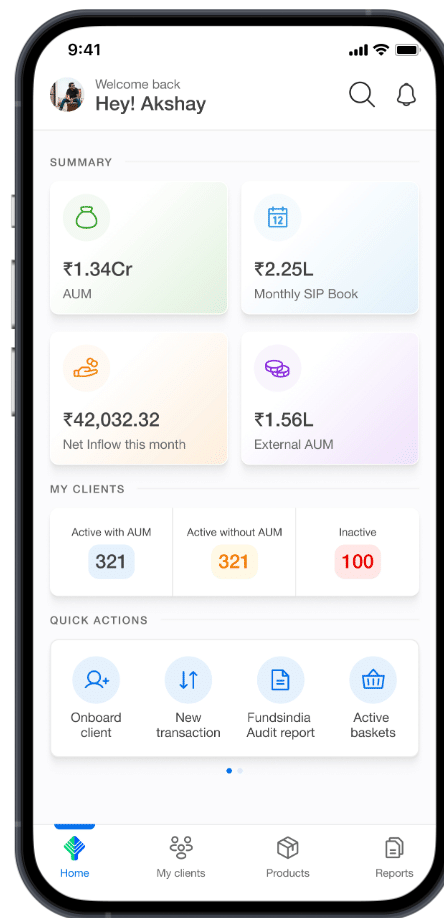
Months 6-7

Phase 2: Polish

- Design consistency across all flows (desktop and mobile)
- System-level improvements

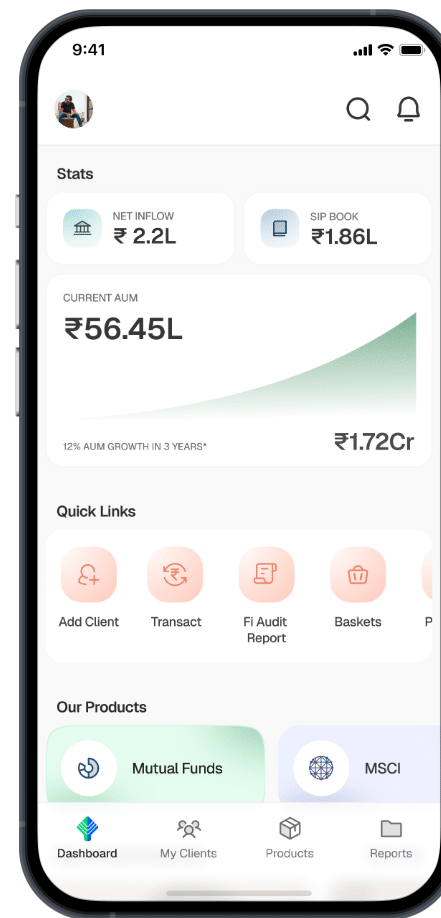
How design evolved

Phase 0: Foundation



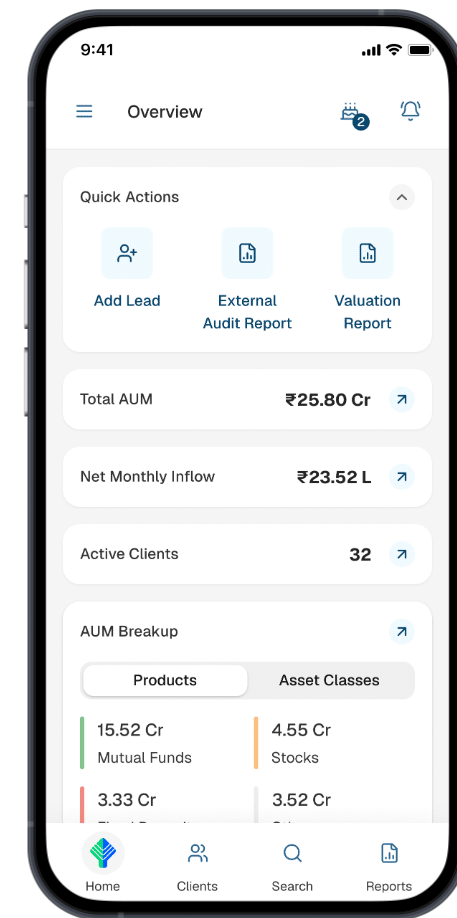
Key actions accessible within 1 tap

Phase 1: Expansion



Modernising the UI with options to explore the breadth of products

Phase 2: Polish



Aligning desktop and mobile with consistent design language

Designing for real-world conditions

Three principles shaped every decision - guiding the Flutter migration to deliver full feature parity across platforms without sacrificing speed.

01

On-the-go usage

Thumb-friendly, one-handed interactions for advisors working in the field.

02

Low connectivity

Optimised performance for poor network conditions common in the field.

03

Reduced cognitive load

Shorter workflows, scannable insights, and quick actions at every step.

Key workflows simplified

The redesigned platform centralised everything an advisor needs in one place.

- Business metrics accessible from the home screen
- Faster lead-to-investment conversion with fewer steps
- Portfolio insights scannable at a glance
- Scalable foundation for future feature rollouts

The image shows a mobile application interface for 'Fetch External Portfolio'. At the top, the time is 9:41 and there are signal, Wi-Fi, and battery icons. Below the title bar, there is a back arrow and the text 'Fetch External Portfolio'. The main content area includes a user profile card for 'Pavithran' with a red circular profile picture containing the letter 'P'. Below the name, there is an email address 'Pavithran.ilango@gmail.com' and a phone number '+91 9298453561'. A text input field contains 'AEXDR2329B'. Below that, a date field shows '22/03/1990 (As per your PAN)' with a calendar icon. A dropdown menu is set to 'I am a Resident Indian'. A question 'Are you a resident or citizen of U.S. ?' is followed by 'Yes' and 'No' buttons. At the bottom, there is a large blue button labeled 'Fetch External Portfolio'.

From lead capture to investment, reduced friction across key steps

Key decisions and tradeoffs

Prioritised dashboard over onboarding in Phase 0
Advisors needed immediate business visibility before anything else. Getting this right built early trust with the product.

Deferred advanced reporting features
Reducing initial cognitive load mattered more than completeness. Reports were added in Phase 1, once core workflows were validated.

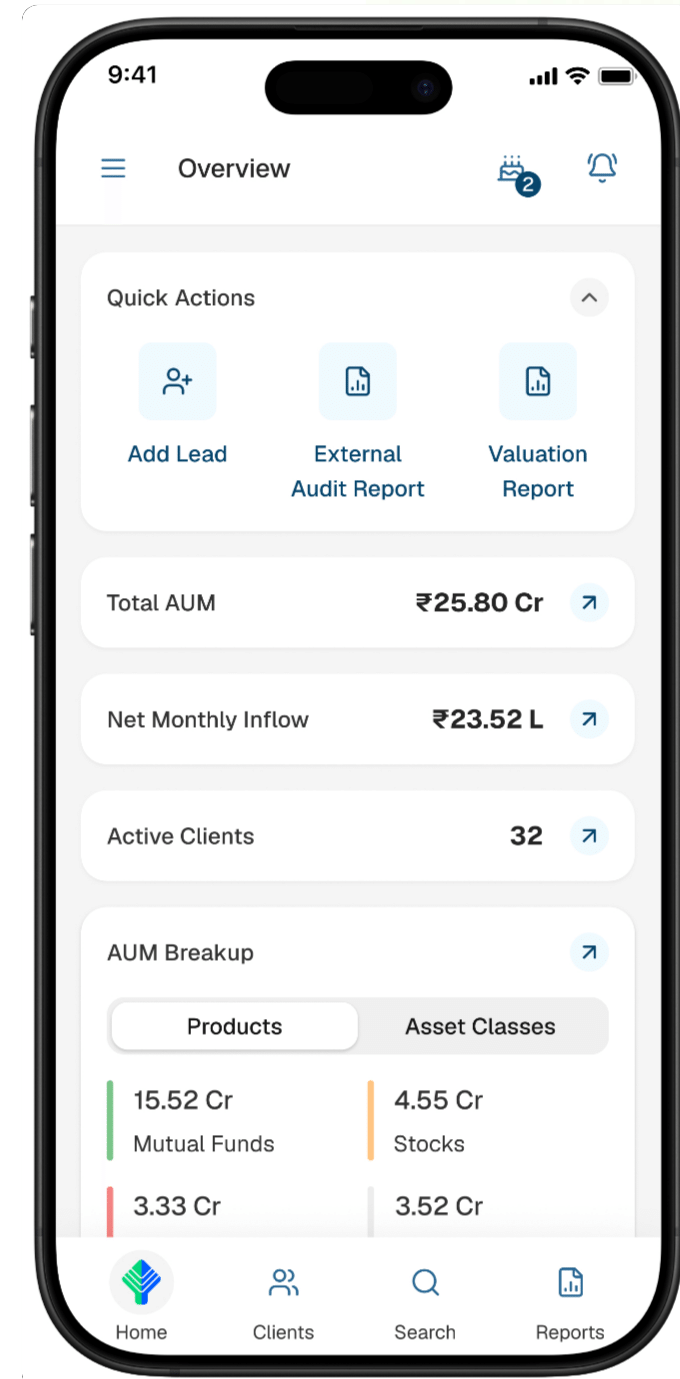
Kept workflows linear over flexible
Flexibility introduces decision fatigue.
Field-based advisors needed speed, not options.

Chose Flutter despite platform risk
Native builds would have created a long-term maintenance split. Flutter enabled feature parity across iOS and Android without doubling engineering effort.

What we learned building for B2B2C

- Balance all three stakeholders: IFA needs, investor needs, and business goals must be held simultaneously in B2B2C design.
- Phase delivery deliberately: Large system problems under business pressure require staged releases, not a single launch.
- Mobile-first is a workflow decision: Rethinking flows from the ground up, not just resizing the UI, is what drives real adoption.

Advisors later requested the same improvements for desktop, validating the approach.



What didn't go as planned

Slow initial adoption

The app launched to a muted response. Advisors needed time and nudging to shift habits - uptake didn't happen automatically, even with a good product.

Required a campaign

Organic adoption wasn't enough. A targeted marketing push was needed to drive downloads and activation - growth had to be engineered, not assumed.

Post-launch rework

Real usage revealed gaps that testing didn't catch. Key workflows had to be revisited and iterated on - a second round of design work was unavoidable.

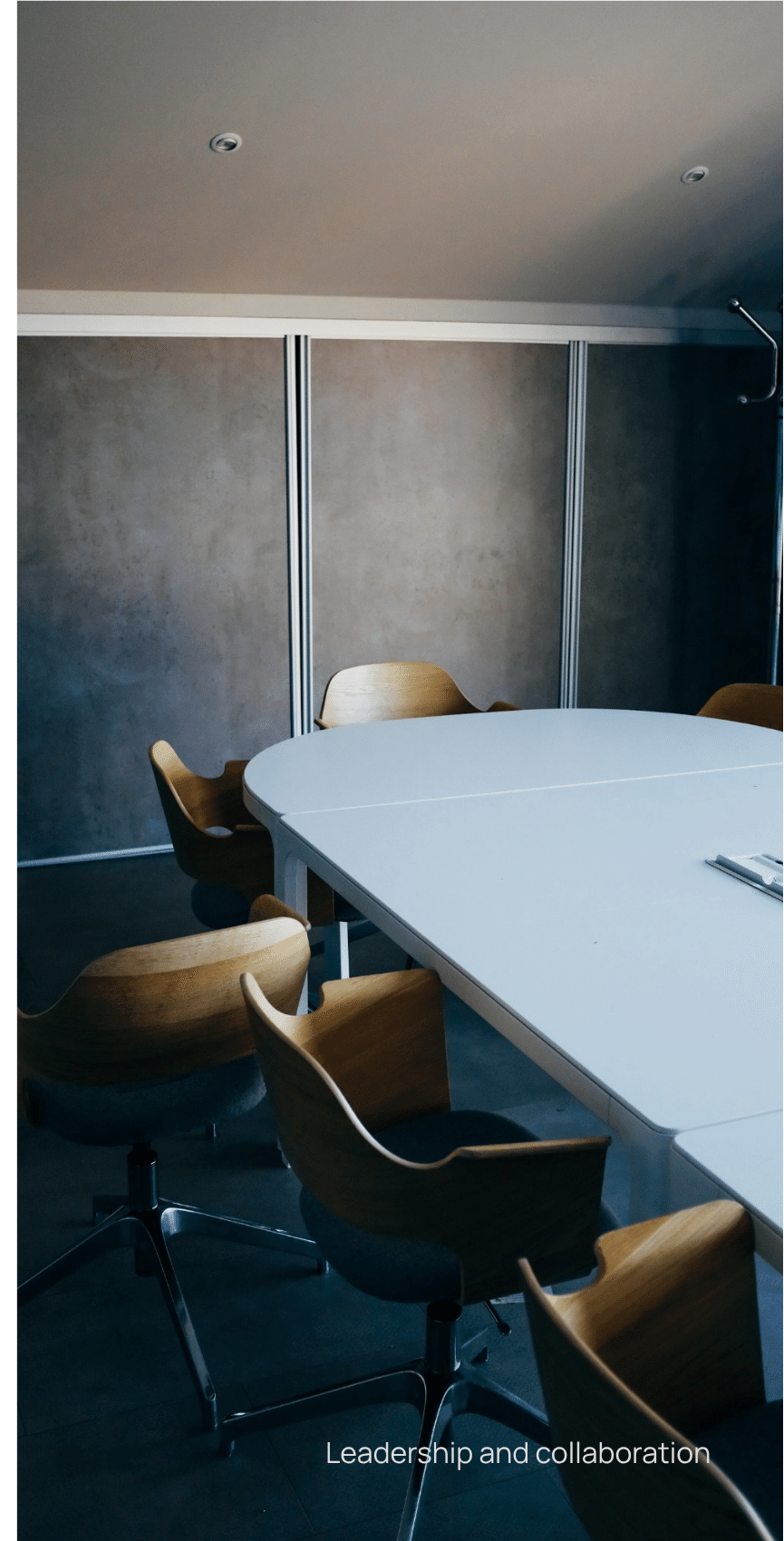
Leadership and collaboration

Aligned CEO, CPO, and CTO on a mobile-first product strategy under tight timelines

Balanced business ambition with product feasibility under tight timelines

Ensured design consistency across multiple releases and contributors

Defined roadmap and drove execution across a fast-evolving platform



What started as a mobile redesign became a shift in how advisors run their business.

Get in touch to discuss the design process in depth.

www.itskoushik.com