Building on Baseline

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About Stewart

Stewart is a publicly-traded real estate information and title insurance company based in Houston, Texas. The company is a multinational organization with operations primarily in the United States, Canada, Australia, and the UK.

As a financial services company, Stewart operates on the edge of technology in many areas, including payment processing and fraud detection.

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Overview

- Purpose
- Assess your existing process
- Assess the baseline process
- Who are your users?
- Reconciling your processes
- Catering to user groups
- Implementation examples

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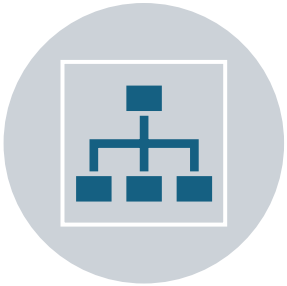
Why



Baseline implementations are fantastic, but they may not meet your organizations' needs

If you have an existing process, you can adjust baseline to what you need

If you don't have an existing process, you can build something that works for your specific requirements

SAI360 is extremely configurable – so why not?

Assess your existing process

Who are the stakeholders?

Stakeholders are the decision makers and owners of the process. These will be the most involved in the day-to-day

Who are the “users” ?

These are the “customers” for the process

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Assess the SAI360 process

- Ideally, the baseline process will “mostly” align with your existing processes
- Evaluate the workflow
  - Do the steps align with your org’s process?
  - Are the approvals similar?
- Identify the key data points
- Understand the process
  - Knows the ins & outs of the process: workflow, triggers, function library calls

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Assess the SAI360 process cont'd

- Meet with your key stakeholders
  - Candid meeting – explain the baseline process, what works, what doesn't, what needs to change
- Hone to baseline as much as you can
  - You can add attributes, but try to use what's there as much as you can
    - Especially things like Divisions, Processes, Risks – these are "shared" items that have underlying connections and mechanisms
  - Try not to break integrations with other modules

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Who are your users?

- Casual users
  - Not technically-inclined
  - Usually business users
  - May only be in the platform sparingly
  - Require the most hand-holding
  - Want a frictionless experience
  - Bad experience = resistance to using platform, both now and in the future

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Who are your users? (cont'd)

- Power users
  - May already be exposed to the platform in other areas
  - Better understanding of the process
  - Appreciate additional functionality
  - Have expectations on how things should (and can) work

Reconcile the processes

- Add attributes that are missing, but utilize what's there as much as possible in case there are underlying connections with other modules
- Determine what interfaces you want your users to see
  - Casual users should see simple, guided UI.
    - There should be no questions about what they need to do and why they need to do it
  - Power users may need more information
    - Dashboards, visuals, automation

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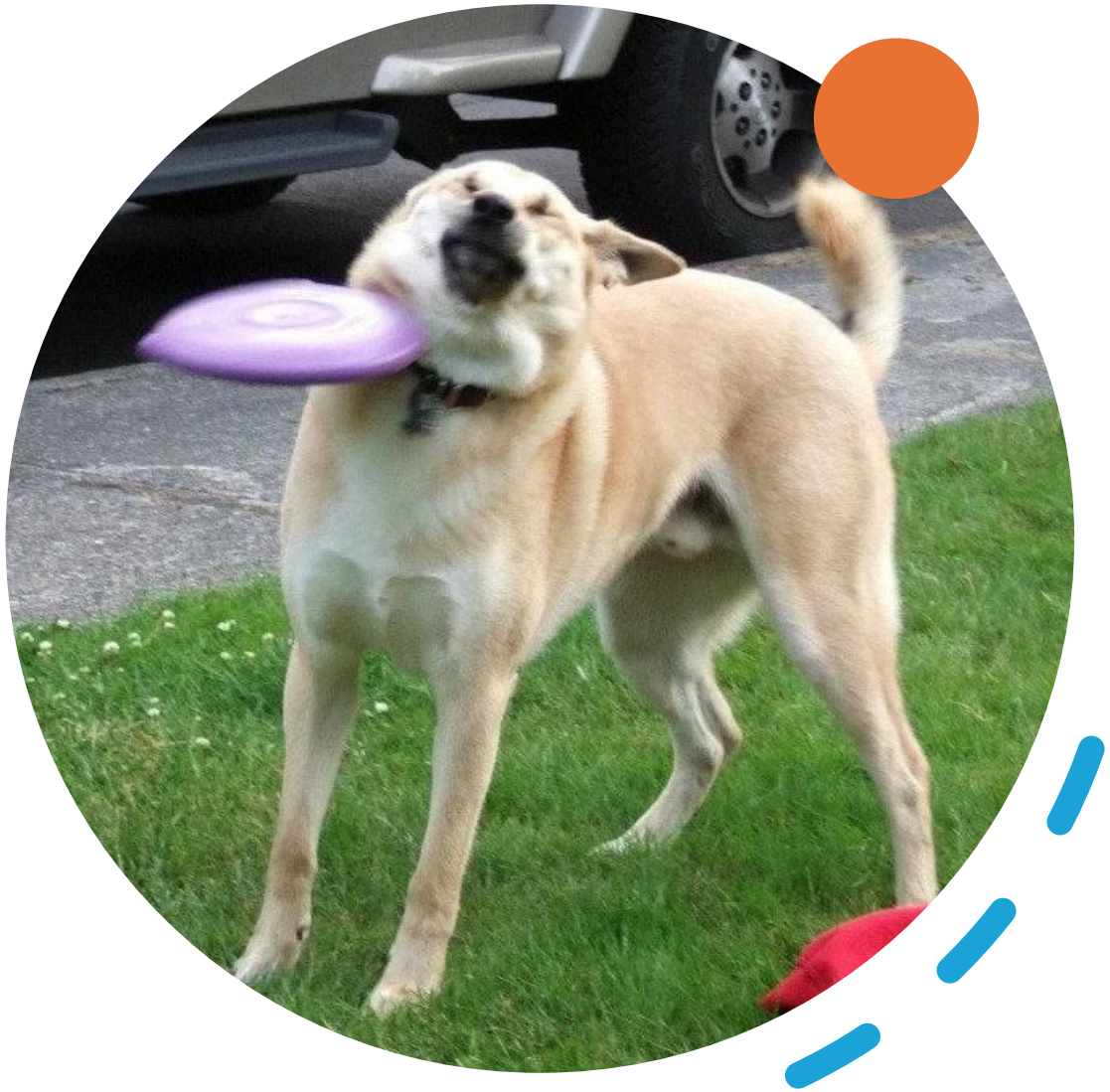
Reconcile the processes (cont'd)

- KEEP IT SIMPLE
  - There will be temptation to includes lots of features, bells & whistles. Roadmap them as potential future improvements but try to keep things basic when you are first starting out
  - The more complicated you make things, the greater the chance things will go wrong – workflow errors, confusion on what to do, broken features, etc.
  - Take an iterative approach. Find what works, what doesn't. Solicit user feedback



Keeping it simple – casual users

- Limit the amount of fields per screen – just collect the basics. Don’t overwhelm
- Use hints or placeholder text to guide what you expect the user to input
- Provide instructions
- “TurboTax” view – small, digestible bits, well explained on what you need to do
- Automate information where you can
- Above all – make things obvious, easy, low friction

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Catering to power users

- Clear, attractive dashboarding can present a lot of data at once
- Minimize clicks where you can
- Keep a consistent style guide
- Embed charts to help visualize data

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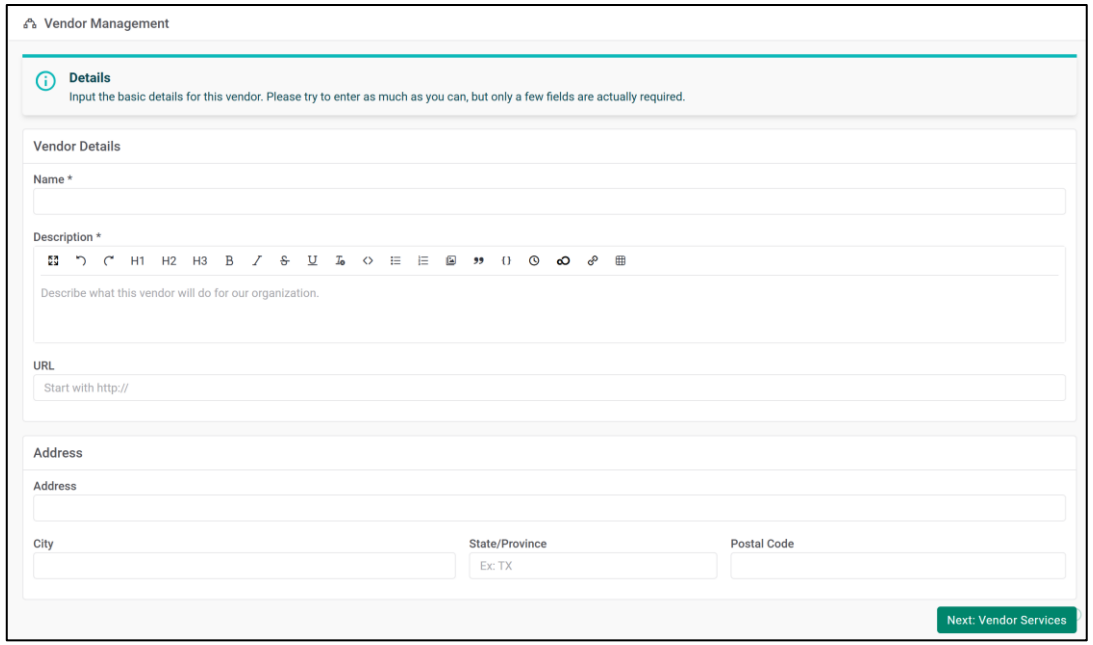
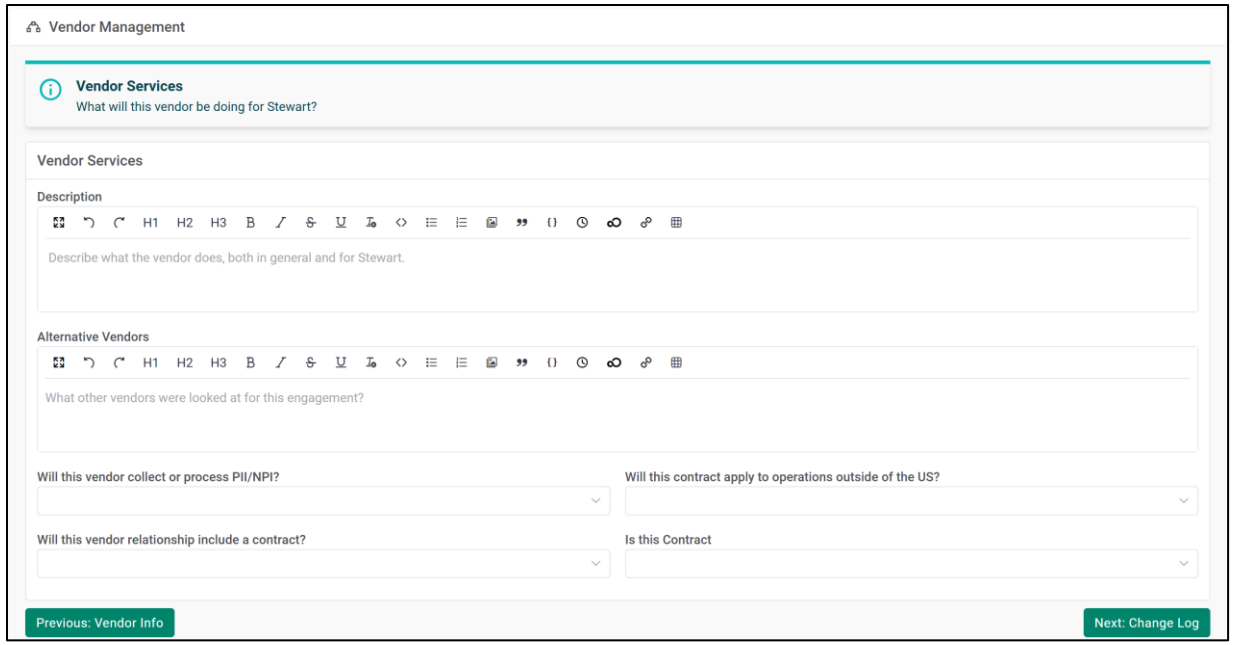
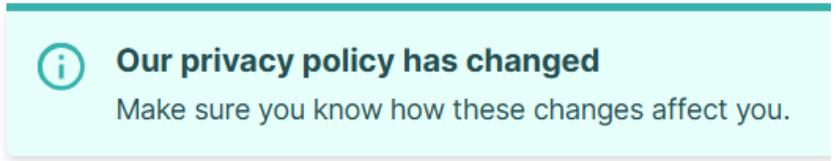
Implementation Examples

“Turbotax” view





Implementation Examples

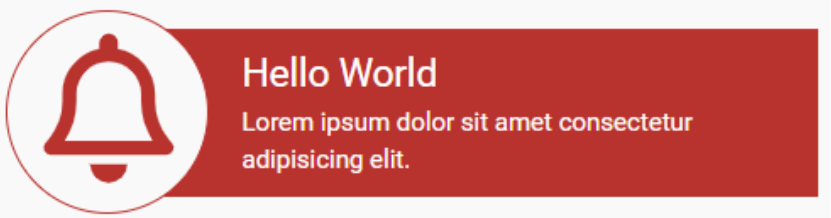


- Source: https://v1.tailwindcss.com/components/alerts#traditional

Code:

```
<div class="bg-teal-100 border-t-4 border-teal-500 rounded-b text-teal-900 px-4 py-3 shadow-md" role="alert">

 <div class="flex">

  <div class="py-1"><svg class="fill-current h-6 w-6 text-teal-500 mr-4" xmlns="http://www.w3.org/2000/svg" viewBox="0 0 20 20"><path d="M2.93 17.07A10 10 0 1 1 17.07 2.93 10 10 0 0 1 2.93 17.07zm12.73-1.41A8 8 0 1 0 4.34 4.34a8 8 0 0 0 11.32 11.32zM9 11V9h2v6H9v-4zm0-6h2v2H9V5z"/></svg></div>

  <div>

   <p class="font-bold">Our privacy policy has changed</p>

   <p class="text-sm">Make sure you know how these changes affect you.</p>

  </div>

 </div>

</div>
```

Implementation Examples



- Source: https://tailwindflex.com/@ui-dev-amar/alert-with-big-logo

Code:

<section class="flex flex-col flex-wrap pt-12 w-full">   <svg class="fill-current h-24 w-24 text-red-700 mr-4" xmlns="http://www.w3.org/2000/svg" viewBox="-125 -75 700 700"><!--! Font Awesome Free 6.7.2 by @fontawesome - https://fontawesome.com License - https://fontawesome.com/license/free (Icons: CC BY 4.0, Fonts: SIL OFL 1.1, Code: MIT License) Copyright 2024 Fonticons, Inc. --><path d="M224 0c-17.7 0-32 14.3-32 32l0 19.2C119 66 64 130.6 64 208l0 25.4c0 45.4-15.5 89.5-43.8 124.9L5.3 377c-5.8 7.2-6.9 17.1-2.9 25.4S14.8 416 24 416l400 0c9.2 0 17.6-5.3 21.6-13.6s2.9-18.2-2.9-25.4l-14.9-18.6C399.5 322.9 384 278.8 384 233.4l0-25.4c0-77.4-55-142-128-156.8L256 32c0-17.7-14.3-32-32-32zm0 96c61.9 0 112 50.1 112 112l0 25.4c0 47.9 13.9 94.6 39.7 134.6L72.3 368C98.1 328 112 281.3 112 233.4l0-25.4c0-61.9 50.1-112 112-112zm64 352l-64 0-64 0c0 17 6.7 33.3 18.7 45.3s28.3 18.7 45.3 18.7s33.3-6.7 45.3-18.7s18.7-28.3 18.7-45.3z"/></svg>   <h3 class="text-lg">Hello World</h3> Lorem ipsum dolor sit amet consectetur adipisicing elit.   </section>

Resources

- Tailwind CSS examples
  - https://v1.tailwindcss.com/docs/extracting-components
- Tailwind Flex
  - https://tailwindflex.com/
- Font-Awesome SVGs
  - https://github.com/FortAwesome/Font-Awesome/tree/6.x/svgs/regular
- Apache eCharts
  - https://echarts.apache.org/

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