

Banking on Data: Conceptualizing Marketing & Sales Dashboards of an Islamic Bank

Brief Summary: Forte Partners collaborated with a leading Islamic bank in MENA to conceptualize and design all dashboards and reports for the marketing and sales function. Through a systematic process that encompassed user needs analysis, conceptual design drafting, and finalization, the team created detailed mock-ups for every role under the marketing and sales function. Aside from these mock-ups, the team defined data visualization standards in alignment with corporate identity, and UX and UI best practices. After a smooth transition to the technical team for execution, the newly implemented dashboards and reports not only catered to the diverse needs of various roles but also established a benchmark for future innovations, thereby enhancing the bank's decision-making agility and precision.



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Case Study: With assets exceeding \$10 billion and a network that spans over 200 branches, this dominant Islamic bank is a key financial player in multiple markets. Specializing in a broad array of services ranging from retail to corporate banking, as well as Sharia-compliant financial solutions, the institution has earned accolades for its commitment to customer-centric innovation. This commitment to excellence has earned it a respected position in the industry, fortifying enduring relationships with a diverse array of individual and institutional clients.

The project began with an in-depth analysis of user needs, focusing on two key areas: the daily decision-making processes that required support and the critical performance indicators that influenced the organization's overall performance. To ensure that the final designs would be as useful as possible, extensive fieldwork was conducted, including individual and focus group interviews with the potential users. This initial effort provided valuable insights that laid the foundation for the dashboard and reports designs.

Moving into the design stage, mock-ups were developed using a blend of industry best practices, feedback gathered from fieldwork, and expert opinions. During this phase, standards for reports and dashboards were established to guide the current and future design processes. Special attention was paid to align the design with corporate identity and best practices in user experience and interface design. These preliminary designs underwent rigorous internal review, allowing various bank units to provide feedback and contribute to the refinement process. Mobile and desktop versions were prepared, setting the groundwork for the final stage of the project where these designs would be fine-tuned and handed off to the development team for implementation.

The project has significantly enhanced the bank's dashboard and reporting capabilities, making data more accessible and actionable across different roles. This transformation is changing how various roles within the bank make decisions. It also sets the stage for more data-driven approaches and establishes guidelines for future initiatives.

To elevate your organization's data-driven decision-making capabilities, **get in touch** with our team.

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