Project: **From paper to screen : Re-imagining complex financial information**

What was the challenge?

Our client Bpifrance is a French public investment bank that provides financing and support to help small and medium-sized enterprises (SMEs) to grow and innovate. Their goal is to favour the growth of the French economy by helping entrepreneurs thrive.

Besides working with entrepreneurs directly, they also help different partner organisations to better serve entrepreneurs, such as commercial banks, entrepreneur support networks, and regional government. For example with commercial banks, Bpifrance can co-finance loans to SMEs and provide partial loan guarantees to the banks, thus sharing the risk and encouraging them to lend to those SMEs.

The overall scope of our mission was to create a family of websites for these partner organisations, so that our client could more effectively manage these types of finance arrangements and collaborate with them on other initiatives.

Within that scope lay a great many challenges, and one of them was to undertake the digital transformation of their entire financial product offering, with over 300 listings, which beforehand was only available on paper or via a downloadable "dumb" PDF.

With new products being launched or modified frequently, the paper-based guide was often out of date as soon as it was published, and there was a significant logistical cost of printing and distributing it to all regions of France and its overseas territories.

Additionally, only one categorisation scheme could be applied when the collection was on paper, which more or less mir-
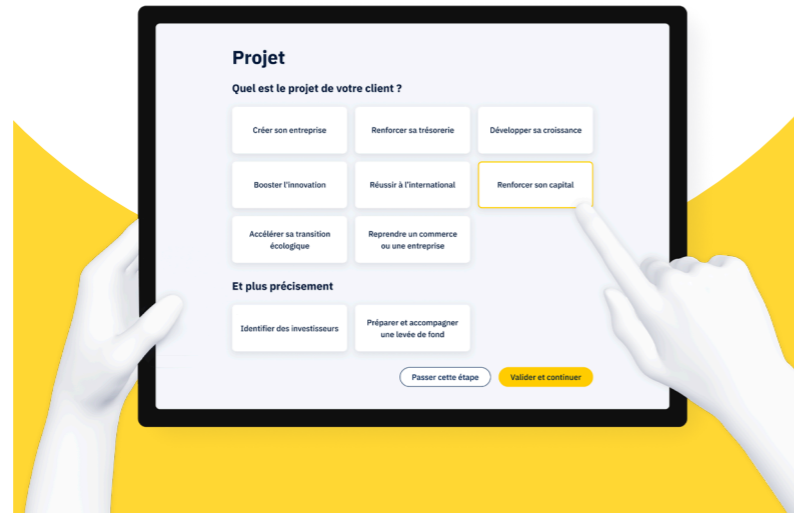
A page from the smart recommendation system used by partners to find the right product to support their entrepreneur clients

rored the internal departments within our client's organisation. This did not always match the way that partners wanted to view the landscape of product offerings or the way they searched for information.

To tackle this challenge, the project involved re-evaluating the way the entire product offering was presented, with the aim of improving findability, comprehension, and choice.

What was the solution?

We started by carrying out interviews with partner organisations to see how they used the existing product guide, and we discovered that many of them felt the need to re-interpret and re-publish some of the product information on their own internal networks. We realised that this was because there was a gap between how our client produced the information, and how the partners wanted to consume it.

We then conducted a series of workshops together with our client and the partners

to reformulate the product information according to their needs. The result of these workshops (which included 100 people over 6 months) was to open up the guide through 4 different dimensions :

Type (Nature of the financial product or non-financial support) This corresponded to the original categories in the paper-based guide
Sector (Products available only in specific industrial sectors)
Theme (Products supporting initiatives such as innovation, international trade, and sustainability)
Region (Products targeting support for specific regions in France)

We also improved the design of product information at the page level. For example, we were able to fine-tune the information hierarchy to highlight exactly the key points that a partner needs to know so they can extract the information in just a few seconds.

Lastly we integrated our client's smart recommendation system to help partners choose the right product for them, and their entrepreneur's situation, in parallel to the new navigation choices.

What was the effect?

The transformation process had 3 key outcomes that greatly improved the user experience.

First, partners were able to navigate the product catalogue in many different ways, and in ways that made sense to them, according to the needs of their entrepreneur clients.

Second, partners were now able to easily check their eligibility for certain products and services early on in the process without having to manually read every word

of the product information. This greatly reduced the time and effort needed to determine eligibility, making the process more efficient and user-friendly.

Third, partners were able to jump directly from information to action by applying for products directly online, removing unnecessary steps and streamlining the process.

There were also direct benefits for our client - product and service information could now be kept up-to-date, they saved money on printing and distribution, and they were able to collect vital metrics in real-time on their product offering, such as their most popular pages.

These improvements were successfully implemented on our client's banking partners website and later applied to the website

for their partners in regional government.

This project demonstrates the importance of digital transformation in streamlining processes and increasing efficiency. By leveraging technology and identifying opportunities for improvement, organisations can overcome challenges and provide better experiences for their customers or partners.

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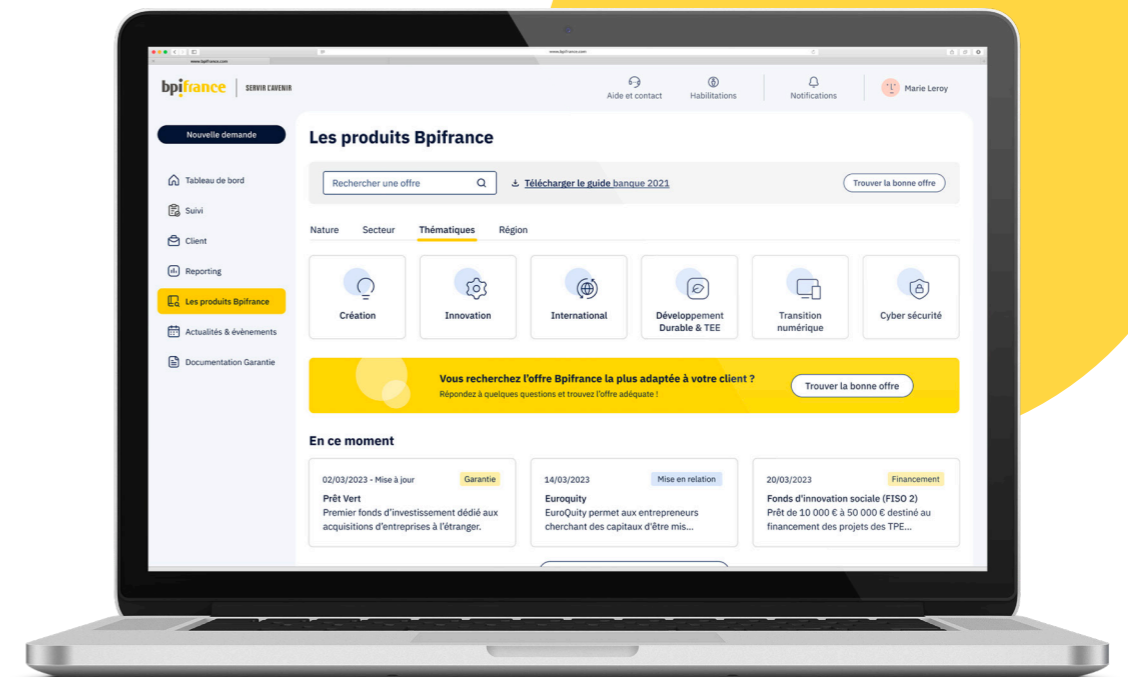
The new product catalogue homepage, showing navigation options with 4 different categories