

PRD FOR FLEET OWNER ONBOARDING SOLUTION

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Team:

Product Manager	NA
Engineering Lead/Team Lead	NA
Designer	NA

Overview

The onboarding solution aims to simplify and streamline the process for fleet owners who are moving onto digital logistics platforms. We are addressing key challenges such as outdated systems, complex verification processes, and a lack of transparency, which currently leads to frustration and delays for fleet owners.

By implementing **user-friendly** features like a **multilingual interface**, **fast digital verification (eKYC)**, and **real-time support through an AI-powered chatbot**, it reduces manual intervention, enhances **user satisfaction**, and **increases the adoption rate** of digital logistics platforms. This is crucial for **driving business growth** by **reducing the operational costs**, and improving the overall efficiency of logistics operations.

Problem

Fleet owners in India face significant **challenges** when onboarding onto digital logistics platforms due to **outdated systems, complex verification processes, and a lack of transparency**. This leads to frustration, delays, and reluctance to adopt new technology, impacting the growth and efficiency of logistics businesses. The **goal** is to develop a seamless and intuitive onboarding flow that **simplifies account creation**, streamlines document and identity verification, and **builds trust** with fleet owners of all tech proficiency levels.

Objectives

Business Goals:

1. Reduce the Manual intervention rate (percentage of verifications requiring manual review or support) by 80%. By implementing features like eKYC, digital verification the need for manually verifying documents and users will be reduced.
2. Increase fleet owners acquisition by 40% within 1 month.
3. To reduce CAC (Customer Acquisition Cost) by 20% by making a smooth and user friendly onBoarding flow.

User Goals:

1. To provide a hassle-free verification process that doesn't require multiple attempts or manual intervention.
2. To enhance transparent communication on their verification status and creation of new accounts.
3. To reduce the time taken to successfully onBoard a new fleet owner by 80%

Assumptions

1. **Tech Literacy:** While they might not be tech experts, fleet owners have a basic understanding of how to use smartphone apps and navigate online forms.
2. **Document Availability:** Fleet owners have the necessary documents (Aadhaar, PAN card, bank details) readily available in digital or physical format.
3. **Regulatory Compliance:** The onboarding process adheres to relevant Indian regulations regarding data collection, storage, and privacy.
4. **Smartphone Usage:** Most fleet owners have access to smartphones with decent internet connectivity. This is crucial for accessing the app and completing the onboarding process.


Constraints

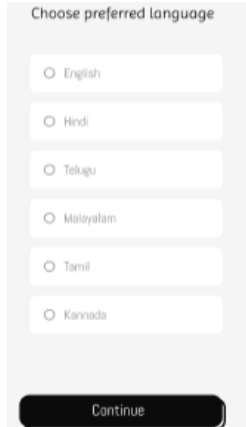
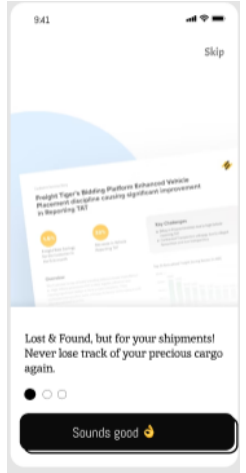

1. Build the solution for all Android mobile devices, as India has the largest market of Android users. The user segment we are targeting primarily uses android devices. We are not targeting the website at this time.

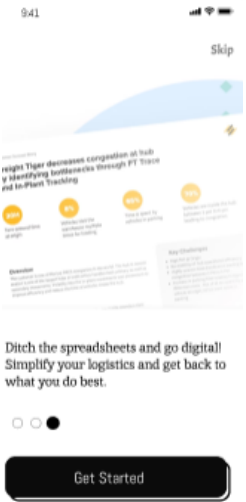
Key Features



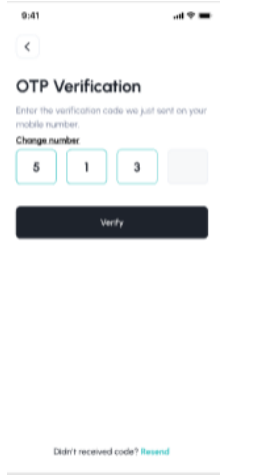
Module 1 : SignUp Process

In the Sign Up Process we have **4 sub modules** which are required for the onboarding process. Additionally, we have introduced a new verification step called "Business Verification (GSTIN)". In this step, users will need to enter their GST details and upload the relevant documents. This verification will be required post-account creation.


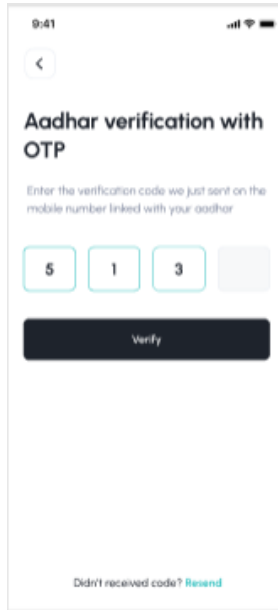
Feature	Explain	Acceptance Criteria	Wireframes
Initiating SignUp	Splash Screen: User downloads the fleet Owner app and lands on the splash screen.	The page should contain only the Freight tiger logo with a simple animation.	


Feature	Explain	Acceptance Criteria	Wireframes
	<p>Multilingual option: users can select their preferred language.</p> <p>Pre-onBoarding: Users are presented with an interactive preview highlighting the benefits they can expect from this platform.</p>	<p>The radio button options. Users can choose the preferred language.</p> <p>Options: English, Hindi, Telugu, Malayalam, Tamil, Kannada in a given Specified order.</p> <p>Button Name : Continue</p> <p>At the bottom it should be functional and lead to next step in the onboarding flow</p> <p>Note : Separate 3 dedicated pages for this</p> <p>The page must include a clear, high-resolution image</p> <p>Image link1 : Add here Image link2 : Add here Image link3 : Add here</p> <p>The text should be prominently displayed and easy to read.</p> <p>Text 1: "Lost & Found, but for your shipments! Never lose track of your precious cargo again." Text 2 : "Say goodbye to endless emails! Get everyone on the same page, no more</p>	  


Feature	Explain	Acceptance Criteria	Wireframes
		<p>crossed wires.”</p> <p>Text 3: “Ditch the spreadsheets and go digital! Simplify your logistics and get back to what you do best.”</p> <p>The page should have a working "Skip" button at the top right corner that allows users to bypass the introduction and proceed directly to the onboarding process.</p> <p>The "Sounds good 🙌" button at the bottom should be functional and lead to the next step in the onboarding flow. (Page 1 & Page 2)</p> <p>The "Get Started" button at the bottom must be functional and lead to the next step in the onboarding flow. (Page 3)</p> <p>The progress indicator (three dots) should accurately reflect the user's position in the onboarding introduction sequence.</p>	

Feature	Explain	Acceptance Criteria	Wireframes
<p>Create Account</p>	<p>SignUp/Login option: After clicking on getStarted/skip on the initial sign up page user will be redirected to the sign up/ login page.</p> <p>Users can signUp with either of the 2 options. One is with mobile no and another is through google.</p> <p>If users already have an account, they can login by clicking on: “Already have an account? Login”</p> <p>The OTP will be sent through SMS.</p> <p>Users will be given the option to change the mobile number here in case the user entered the wrong mobile number earlier and didn't</p>	<p>The page will contain a Freight tiger logo with 2 buttons at the bottom Label: Button 1 : Login Button 2 : Sign Up</p> <p>If user chooses to sign Up using Mobile no:</p> <p>Users should enter the 10 - digit Indian mobile number.</p> <p>If user enters less than 10 numbers then the button won't be enabled to proceed for the OTP verification</p> <p>Error message: “Enter the 10 digit No” .</p> <p>OTP will be 4 digit otp code. It can be entered by user/ autofill otp verification can be done to proceed further</p> <p>Label : “Change Number”</p>	 <p>Wireframe 1 shows the Freight Tiger logo at the top. Below it are two buttons: a dark 'Login' button and a light 'Sign Up' button.</p>  <p>Wireframe 2 is titled 'Verify your mobile number'. It includes a text input field for the mobile number, a 'Get OTP' button, and a link for 'Or Sign Up with' Google.</p>  <p>Wireframe 3 is titled 'OTP Verification'. It shows a numeric keypad with the digits 5, 1, and 3 entered. A 'Verify' button is at the bottom.</p>

Feature	Explain	Acceptance Criteria	Wireframes
	<p>receive OTP.</p> <p>At the bottom user will be given an option to resend the OTP, in case they have not received it.</p>	<p>Label : Didn't received code? Resend</p> <p>If user chooses to login using Google:</p> <ol style="list-style-type: none"> 1. User clicks on the " Sign Up with Google" button 2. A secure passwordless account of the user has been created by redirecting to Google's authentication page and by selecting the email id and clicking on confirm. 	
<p>Uploading and verification of required Documents</p>	<p>Users have to upload the Aadhaar and PAN details for verification.</p> <p>Aadhaar Front: Users can choose between two verification methods. This will be a required step:</p> <ol style="list-style-type: none"> 1.Aadhaar OTP 2.Aadhaar QR Scan 	<p>There will be a progress bar at top, showing the progress the user makes to complete the onboarding process.</p> <ol style="list-style-type: none"> 1.Aadhaar Front 2.Pan Card 3.Basic details 4.Freight Id <p>Heading name : "Aadhaar Card" Font size: 12 px</p> <p>Below Text: "Please upload your aadhaar card below for completing your first step of KYC"</p>	

Feature	Explain	Acceptance Criteria	Wireframes
	<p>A text box asking for Aadhaar No. It is a required field.</p> <p>If the user is facing any problem they can get in touch using WhatsApp Which is placed at bottom. [For each step of verification : Aadhaar, PAN, Basic details]</p> <p>At the bottom user will be given an option to resend the OTP, in case they have not received it.</p>	<p>Font size: 9 px Label: "Aadhaar Card Number". Users can "upload aadhaar card photo". It will be optional.</p> <ol style="list-style-type: none"> 1) Drive 2) Gallery 3) In Built camera <p>After uploading a pop up will be shown to the user saying: " We're reviewing your document. We'll be back in less than 24 hours".</p> <p>Label : "If you are facing any difficulties, please get in touch with us on Whatsapp"</p> <p>"SUBMIT" button at the bottom to move to the next page, where the user will have to give the OTP code sent on the registered no.</p> <p>OTP will be 4 digit otp code, followed by the "Verify" button for verification to proceed further</p> <p>Label : Didn't received code? Resend</p> <p>Important: For Aadhaar verification we are integrating with the third party API called Perfios's</p>	 

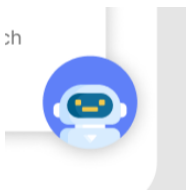
Feature	Explain	Acceptance Criteria	Wireframes
	<p>Pan Card :</p> <p>A text box asking for Pan Card No.</p>	<p>Heading name : "PAN Card" Font size: 12 px</p> <p>Below Text: "Please enter your PAN Card Number or upload your Pan Card Photo below" Font size: 9 px</p> <p>Label: "Pan Card Number".</p> <p>Users can upload the photo of the Pan card. It will be optional.</p> <ul style="list-style-type: none"> 4) Drive 5) Gallery 6) In Built camera <p>After uploading a pop up will be shown to the user saying: " We're reviewing your document. We'll be back in less than 24 hours".</p> <p>Important : PAN verification we can integrate cashfree APIs from the backend</p>	

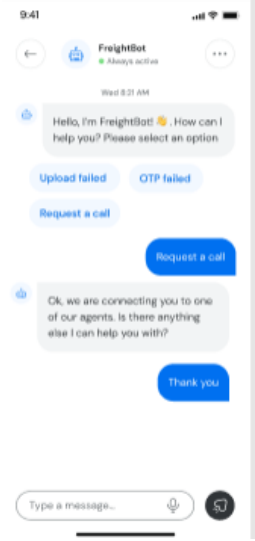
Feature	Explain	Acceptance Criteria	Wireframes
<p>Enter Basic Details</p>	<p>Basic Details: User can fill in their personal details</p> <p>Redirects you to Next page saying “KYC Completed”</p>	<p>Heading name : “Basic details” Font size: 12 px</p> <p>6 Text fields Name : Required Field(Mandatory) :- Company Name, Your Name, Fleet Size, Location, Pin Code</p> <p>Not Required Field(Not Mandatory):- Your Role, Age, Qualification, Business Type, Types of vehicle(Dropdown text field)</p> <p>Button Name : “Submit” At the bottom to complete the onboarding process.</p> <p>Heading : “ KYC Completed” Message : “ Thanks for submitting your document, we will verify it and come back. It won’t usually take more than 24 hours”</p> <p>Button Name :“ Next” Proceed further to the landing page of the app.</p>	 <p>The wireframe shows two screens. The top screen is the 'Basic Details' form, which includes a progress indicator at the top with four steps: 'Add your Photo', 'Pin Code', 'Basic Details', and 'Payment ID'. The 'Basic Details' section contains six text input fields: 'Company Name*', 'Your Name*', 'Fleet Size*', 'Location*', 'Pin Code*', and 'Your role'. A 'Submit' button is located at the bottom. Below the form, there is a note: 'If you are facing any difficulties, please get in touch with us on WhatsApp'. The bottom screen is the 'KYC Completed' confirmation screen, featuring a large checkmark icon, the text 'KYC Completed', and a message: 'Thanks for submitting your document we'll verify it and come back. It won't usually take more than 24 hrs'. A 'Next' button is positioned at the bottom of this screen.</p>

Feature	Explain	Acceptance Criteria	Wireframes
Business Verification (GSTIN) [NOTE: This verification will be required post-account creation.]	By Verifying the GST Number confirms that the user is a registered business entity. It ensures that the businesses using the platform are compliant with GST regulations.	User can choose between two Verification methods: 1. OTP verification : OTP will be sent to the registered mobile no 2. Upload Documents: Can upload document from gallery/click a photo and upload	

Module 2 : Help & support during the onBoarding

This is another module where we will build the AI-powered chatbot for immediate onboarding support. Once this Module is completed we can integrate this module into the module 1 screens(Uploading and verification of required Documents), so that users can get immediate support and their queries are resolved.

Feature	Explain	Acceptance Criteria	Wireframes
Help & support during the onBoarding	<p>A floating chat icon in the bottom right corner will provide access to an AI powered chatbot for immediate onboarding support.[For each step of verification : Aadhaar, PAN, Basic details]</p> <p>AI-powered chatbot is to provide immediate, 24/7 assistance to users during the onboarding process.</p> <p>Knowledge Base: The chatbot is</p>	<p>AI Chatbot image Link: Add Here</p> <p>Integrate an Google Cloud Natural Language model to detect the language of user inputs</p> <p>Users can either type the message or have an audio text option as well in the bottom.</p> <p>Build a knowledge base in multiple languages. Mentioned while choosing at the start. [English, Hindi, Telugu,</p>	

	<p>trained on a knowledge base containing answers to common onboarding questions, FAQs, troubleshooting guides, and relevant information.</p> <p>If a chatbot is not able to answer the question of users, it will create a support ticket.</p>	<p>Malayalam, Tamil, Kannada].</p> <p>Have a fixed options of most common problems/themes displayed in the chat and ask users to select from them so they don't have to enter or type any text.</p> <p>Customer service representative should take over the ticket within 5 mins.</p>	
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Module 3 : Account Status Update

This module ensures that **users** are kept **informed of their account verification status** through various **notification channels**, and it provides a clear and transparent update mechanism within the app. The **backend processes handle the status changes**, which are then communicated to the users through **in-app notifications, SMS, and email**.

Feature	Explain	Acceptance criteria
Notification Channels	In-App Notifications: For real time update on verification status changes	In-app messages alert the user when their account status changes. [Ex - " Your account is not verified! "]
	SMS Notification : For reaching users who may not have immediate access to the app or email .	A brief SMS message will be sent to the user's registered mobile number in the language they selected while onBoarding informing them of critical status changes.[Ex - " Your account is verified! "]
	Email Notifications : Provides detailed updates and instructions for failed verifications .	Detailed emails are sent to the user's who have registered through email address in the language

		<p>selected during the onboarding process. Reasons why their account failed the verification process and with the link to re submit and guide users by providing Next steps.</p>
	<p>Verification Status in the App : In the profile section users can check the verification status.</p>	<p>Field Name : Status It will automatically get updated, when the status is changed in the backend.</p>
<p>Account Status Definitions</p>	<p>Verification in review : Documents are uploaded, and accounts are created but documents are still under verification</p>	<p>1. No notification is sent when the status is “In review”</p> <p>2. Users see an in app status saying “In Review”, with limited access to features until verification is done</p>
	<p>Verified/Approved: Documents have been successfully verified</p>	<p>1. Access to all platform features</p> <p>2. Status is changed to “Verified”</p> <p>3. Users receive a confirmation message/email that their account is verified Message : “Congratulations! Your account is verified”.</p>
	<p>Verification Failed/Rejected: One or more submitted documents have failed verification (Ex - discrepancies in information, invalid documents)</p> <p>Users are notified of the specific reasons for rejection and are guided on how to resubmit the correct documents</p>	<p>1. Status is changed to “Verification Failed”</p> <p>Message : “We were unable to verify your [document name].”</p> <p>Then step by step instructions will be</p>

		provided on how to resubmit the documents.
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Product Roadmap

H= High(8-10), M = Medium(4-7), L= Low (1-3)

P0 = Critical , P1 = Important, P2 = Good to have

Priority	Feature	Impact	Effort	Dependency	Timeline
P0	Initiating SignUp	Allow users to understand the Core value provided by the app which enhances the user engagement and increases the retention.	Medium	No	[24/6/2024 - 30/6/2024]
P0	Create Account	Simple and intuitive Multiple sign up options for creating an account will provide flexibility to users. It will reduce friction and encourage users to complete the onboarding process.	Medium	Yes (P0-Initiating SignUp)	[1/7/2024 - 7/7/2024]
P0	Uploading and verification of required Documents	Simplifying the verification process with clear instructions will reduce frustration and increase completion	High	Yes (P0-Create Account)	[8/7/2024 - 21/7/2024]

		rates. Important to build user trust and ensure security.			
P1	Help & support during the onBoarding	Enhances user experience and reduces drop-off rates	Medium	Yes (P0-Uploading and verification of required Documents)	[22/7/2024 - 4/8/2024]
P1	Account Status Update	Ensures timely updates, reduces user frustration, and improves verification transparency	High	Yes (P0-Uploading and verification of required Documents)	[5/8/2024 - 19/8/2024]

[NOTE: To finalise the timelines, we need to discuss it with the technical lead]

I have **prioritized the Initiating SignUp** Process because it addresses the **critical issue of language barriers**, allowing users to select their preferred language right from the start. This step ensures users understand the platform's value proposition, enhancing their engagement. Next, the **sign-up options** using mobile or Google are prioritized, considering that almost all users have access to smartphones and Google accounts. Offering both options **simplifies registration** and accommodates different user preferences. Following account creation, the **document verification** process is **prioritized**. Assuming all users have Aadhaar and PAN cards, we streamline this step by allowing users to either enter their numbers or upload images. The **backend API integration handles verification**, making the **process quick and straightforward**. Next, the **AI chatbot for help and support** is prioritized to **provide 24/7 assistance**. This feature ensures a **seamless user experience** and significantly **reduces drop-off rates** by addressing **user queries and issues in real-time**. Finally, the **Account status update** is prioritized to ensure **timely updates** and improve the **verification transparency**.

NOTE : We can release our product once our Module 1 is completed and start testing with our users. We don't need to wait additional weeks to go ahead with the Module 2 and Module 3 features. We can work parallelly on it.

Key Metrics

North Star Metric : Onboarding Completion Rate (OCR) = # No of users who successfully completed the onboarding process

Metric	Definition	Target
Average Onboarding Completion Time [Leading Metric]	The average amount of time taken by users to complete the entire onboarding process from initial sign-up to the final verification step.	<p>< 10 mins for users who didn't face any issue</p> <p>< 30 mins for users who face issues(any external or internal) and seek help through chatbot.</p> <p>< 24hrs for the users who had issues while onBoarding and seek manual help by either rising tickets or call customer care</p>
Onboarding Step Abandonment Rate (OSAR) [Leading Metric]	The percentage of users who abandon the onboarding process at each step (e.g., mobile verification, document upload, profile completion).	Users who abandon the platform should not be >20 % . (Continuously gather user feedback and iteratively optimize steps to improve completion rates.)
Document Upload Success Rate (DUSR) [Lagging Metric]	# No. of users successfully uploaded the documents for verification	>30% of users who started finished uploading the documents.
Feedback Loop Efficiency (FLE) [Lagging Metric]	To measure how effectively and quickly user feedback is collected, analyzed, and implemented to improve the onboarding process.	To incorporate the feedback obtained within 2 weeks
Support Ticket Volume [Lagging Metric]	# No of support tickets raised by users seeking assistance during the onboarding process.	Minimize the support tickets as much as possible. It should not be >10%.

User Flow

Link : [User Journey Flow](#)

Wireframes

Link : [Design](#)

Link : [Prototype](#)

Launch Plan

- **Phase 1:**

- **Pre-Launch**

- **Internal Testing :** Conduct through Internal testing with the development and QA team to ensure the product has no bugs.
 - **Beta Testing :** Select the group of fleet owners who will use your features and gather feedback and make necessary adjustments before the official launch.
 - **Feedback Integration :** Analyze the feedback from beta testers and implement those changes to improve the user experience

- **Phase 2:**

- **Launch**

- The product features will be launched in the market

- **Phase 3:**

- **Post-Launch :**

- **Monitor and Measure:** Track key metrics such as user acquisition, onboarding completion rates, and support ticket volume to measure the success of the launch.
 - **Continuous Improvement:** Collect ongoing feedback from users and continuously iterate on the product to address any issues and improve the user experience.

Conclusion

The Fleet Owner Onboarding Solution is a comprehensive approach to **improve the onboarding experience** for fleet owners in India. By addressing existing pain points and incorporating user-friendly features, the solution aims to drive **business growth, reduce operational costs**, and enhance the **overall efficiency of logistics operations**. The carefully planned **product roadmap** and **GTM strategy** ensure a successful launch and

continuous improvement, ultimately contributing to the **increased adoption** of digital logistics platforms.

Open Questions?

Asked By	Questions?	Answers

Approvals

Name	Signature	Date
Product Owner		
Engineering Manager		
Marketing Manager		