

# Bedrock AI | Redesign Overview page

---

May - 2022

## Bedrock AI

---

Bedrock AI is a **web-based** equity **research portal**. The software extracts machine learned red flags from SEC filings and predicts downside risk.

# Project overview



## The project brief:

Redesign the "Overview" page as a news feed of recent high impact information served through the platform.



## Project duration:

April - May 2022

The screenshot displays the 'Bedrock AI' Overview page. At the top, there are navigation tabs: 'Overview', 'Screening', 'Watchlist', and 'User Guid'. A search bar is located to the right of these tabs. Below the navigation, there is a row of filter buttons: 'All', 'Subpoenas & Investigation', 'Restatements', 'Management turnover', 'Material Weakness', 'Cash Flow & Credit', 'Other High Risk', 'Non-Timely Filings', and 'SEC Comments'. The main content area is titled 'Red Flag Feed' and 'View My Portfolio'. It shows a grid of 12 items, each representing a red flag. Each item has a header with a red dot, a title, a subtitle, and a paragraph of text. The items are categorized by type: 'Management turnover', 'Cash Flow & Credit', 'Non-Timely Filings', and 'SEC Comments'. At the bottom of the page, there is a 'Loading' indicator with three dots.

# Project overview



## The problem:

The customers have to spend too much time looking up through the platform in order to find what they are looking for.



## The goal:

Increasing the visibility of high impact information for the customers by highlighting relevant information and improving the interaction efficiency.

# Project overview



## My role:

Executing discovery using design thinking methodologies, ideating on solutions and testing the high fidelity solution for future iterations.



## Responsibilities:

- User feedback collection
- Define personas
- User journey maps
- Information Architecture
- Low-fi wireframes
- Prototyping
- Accessibility audit
- Usability testing

# Understanding the user

- User feedback collection
- Define persona
- Problem statements
- User journey maps

# User Research Overview



Users are mostly white men aged 25 to 55 year-old who include in four major group

1. Long-only analysts
  2. Short-focuses analysts
  3. Traders
  4. Retail
- Conducting 1-1 research
  - Users feedback by communication through email, call or message

# User Pain Points

1

Worried to **miss major/high impact risks/opportunities** at his longs.

2

**Not enough time to read Ks/Qs or even look up key red flags** on our platform/investigate during earning season.

3

**Worried about being wrong about short thesis** and wants to see new issues come up to reinforce thesis/conviction.



# Primary Persona: Luke



## Luke Constable

**Age:** 45  
**Education:** Degree in history (Stanford)  
**Hometown:** NYC  
**Occupation:** Manages a small long-short hedge fund

*" I truly need a polished feed including the critical information about all types of companies and competitors to help me get immediate action if it's needed."*

### Goals

- **Knows if new risks arrive** without having to dive into the details
- Reads earnings reports
- Wants to reinforce the thesis or exit immediately if contradicted
- Idea generation: **Wants to monitor for new risks/high impact events at high risk companies (short).**
- **Wants to understand what bad things are happening to competitors of his long investments.**

### Frustrations

- **Worried that he'll miss major/high impact risks/ opportunities at his longs**
- **Not enough time to read** Ks/Qs or even look up key red flags on our platform/investigate during earning season
- Worried that he was wrong about his short thesis and wants to see new bad things come up to reinforce thesis/conviction.

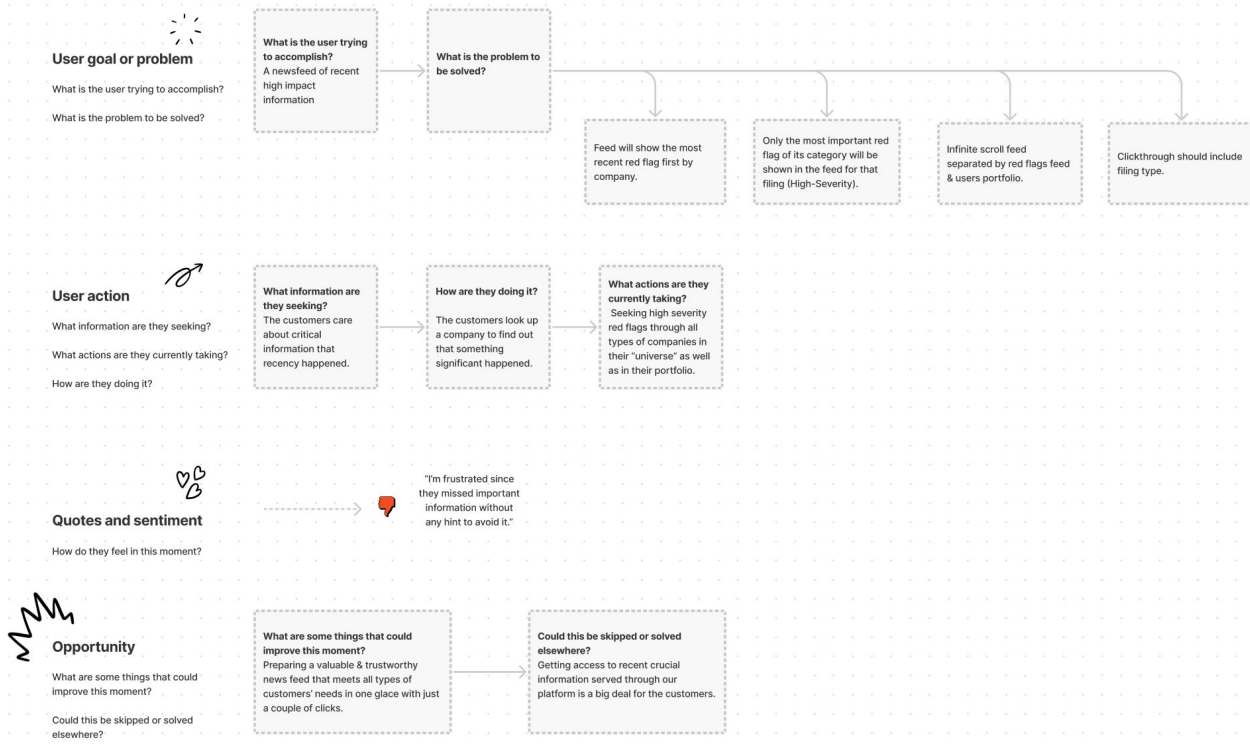
Luke Constable is an analyst & trader who Manages small long-short hedge fund. He needs to get access to recent critical information of high impact red flags on loading the dashboard because that will help him to take immediate action.

# Problem Statements

- User (WHO)
- Needs (WHAT)
- Goal (WHY)

Luke is an **analyst & trader** who manages a small long-short hedge fund. He **needs to get access to recent critical information of high impact red flags** as a feed on loading the dashboard **because that will help him to take immediate action.**

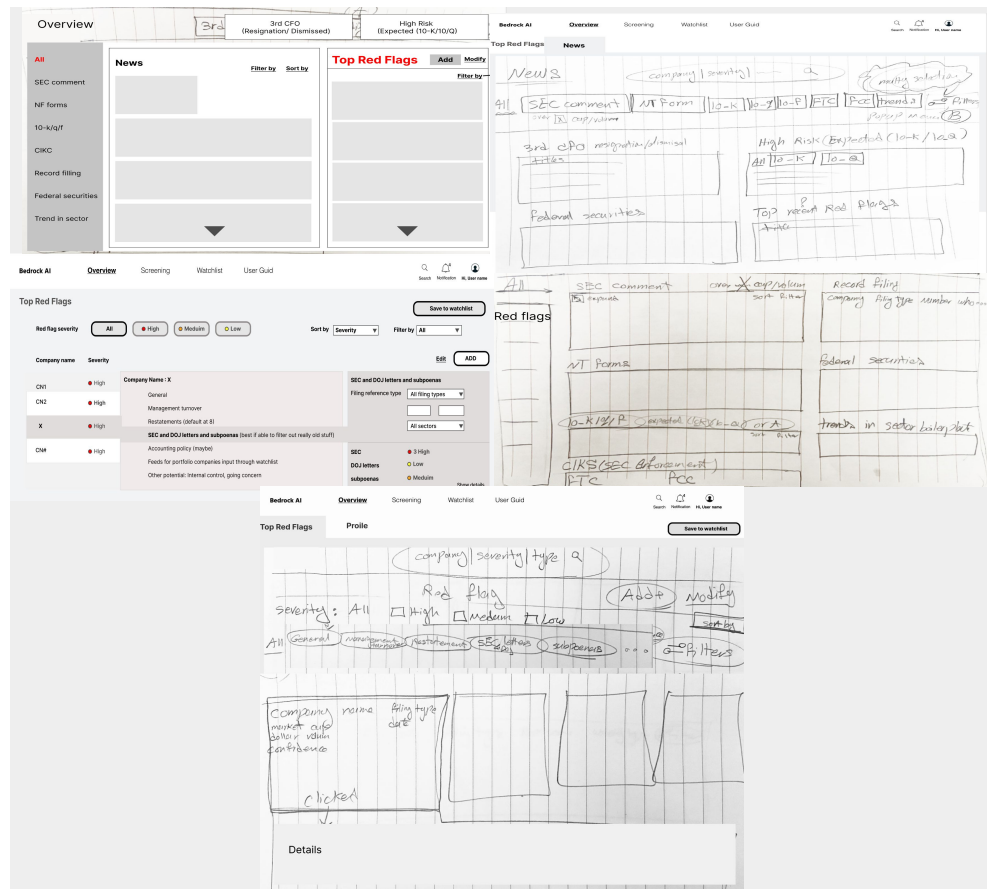
# Journey Map Overview





# Sketching Ideas

Created about five initial rough paper designs to facilitate customers accomplishing their goals based on user research findings.



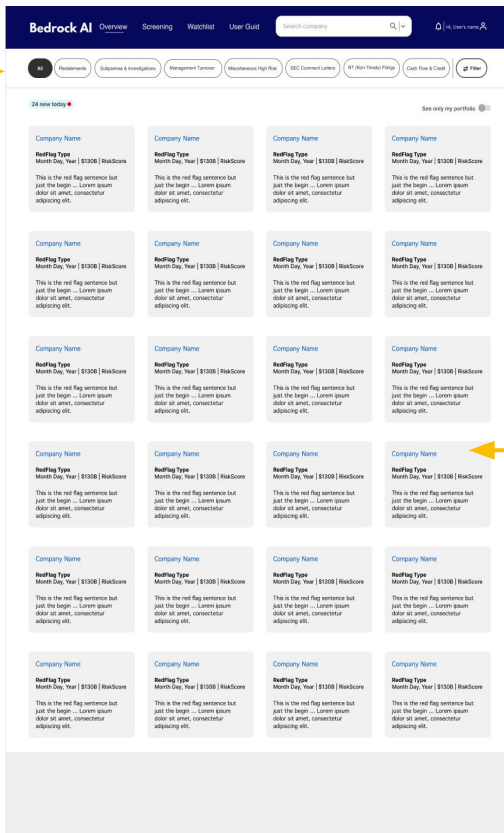
# Wireframes

## Element:

Feeds types and requirements

## Benefit to the user:

Multiple choice to show the most recent red flag first by company



## Element:

Feeds demonstrate red flags' detail

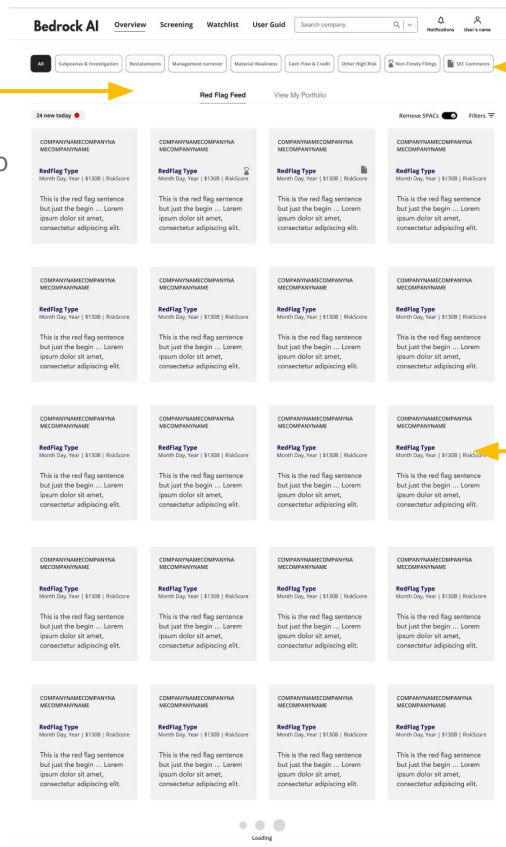
## Benefit to the user:

List only the most important red flags (clickable)

# Wireframes

**Element:**  
Split list into overall Feed & Portfolio

**Benefit to the user:**  
Real-time feed separated between general and customized



**Element:**  
Add sign for NT & SEC filing types

**Benefit to the user:**  
Make NT & SEC distinguishable

**Element:**  
Focused on filing type than the company name

**Benefit to the user:**  
Recognize feed type easily

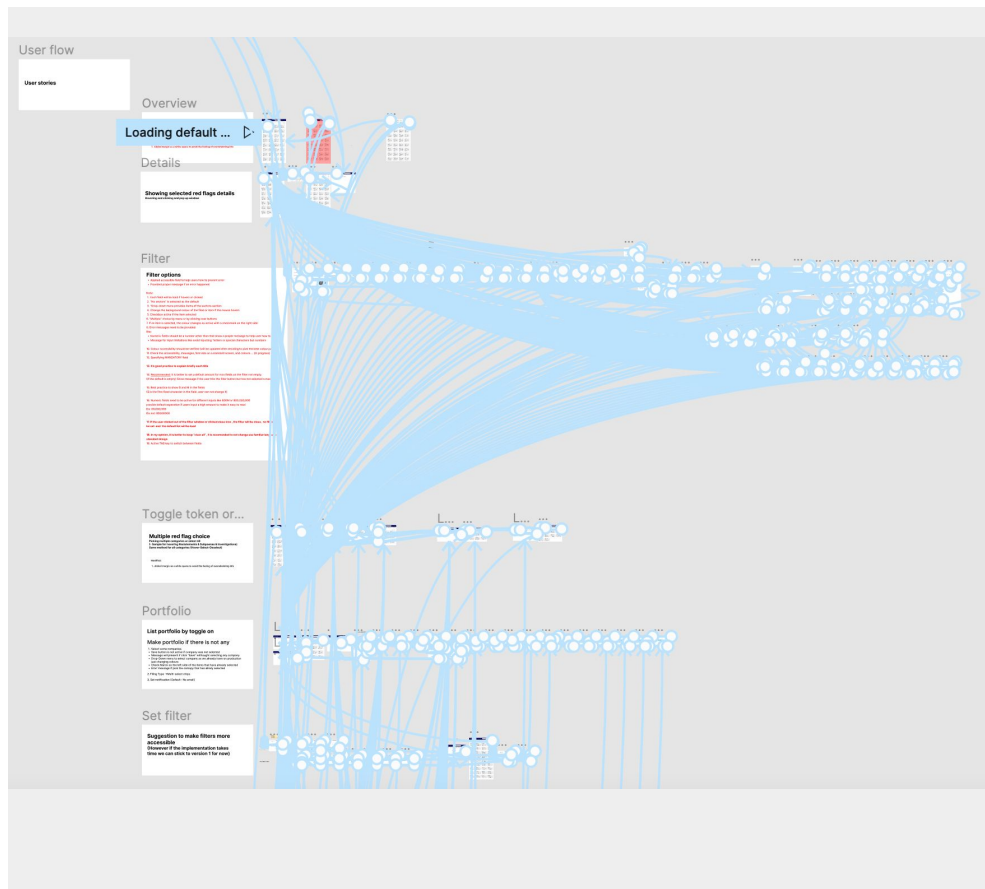
# Prototype

Creating the final version of prototype to initiate usability testing phase.

## [Figma file](#)

User flow:

- Multichoice ordered feeds
- Set filters
- Switch between two views
  - Overall feed
  - Users' portfolio (My companies)





# Hi-fi Overview:

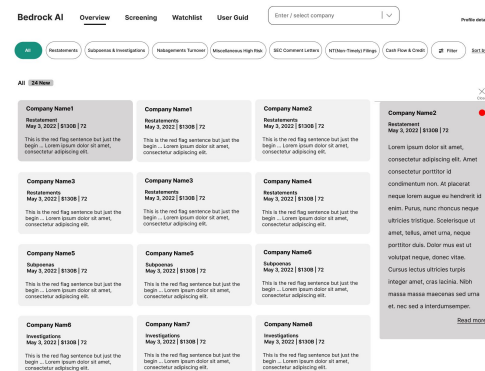
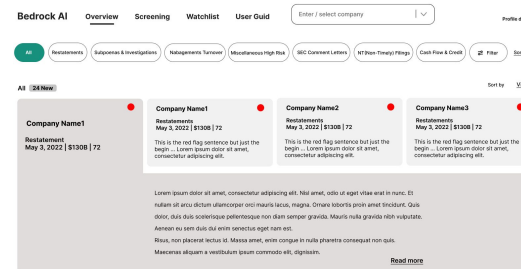
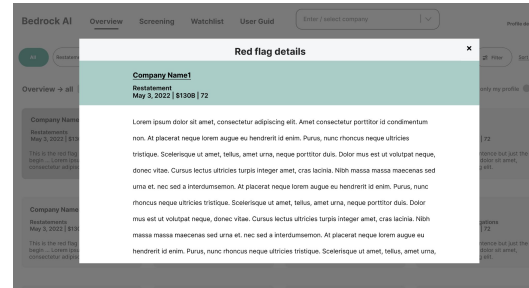
## How to display details?



## The feature to represent red flag details:

Three ideas

1. Pop up window
2. Drop down
3. Slide show



# Hi-fi Overview: Multiple Choices



The feature to select more than one red flag to list:

That would be great if we can test this feature with a couple of users to see if this is easy to use and they realize this feature or they need help to understand it.

**Bedrock AI** Overview Screening Watchlist User Guide  | Profile details

All **Restatements** **Subpoenas & Investigations** Nabagements Turnover Miscellaneous High Risk SEC Comment Letters NT(Non-Timely) Filings Cash Flow & Credit Filter Sort by

Overview → Restatements | Subpoenas & Investigations See only my profile

<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name2</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name3</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
<b>Company Name3</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name4</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name5</b> Subpoenas & Investigations May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name5</b> Subpoenas & Investigations May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
<b>Company Name5</b> Subpoenas & Investigations May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name5</b> Subpoenas & Investigations May 3, 2022   \$130B   72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.		

# Hi-fi Overview:

## How to get access to the portfolio?



## The feature to list profile red flags:

Not sure either toggle is a good idea to review portfolio or tab

Bedrock AI Overview Screening Watchlist User Guid  Profile details

AI Restatements Subpoenas & Investigations Holdings/Turnover Miscellaneous High Risk SEC Comment Letters All/Non-Timely Filings Cash Flow & Credit Filter

Browse by news Browse by profile

Overview → news → all 38 News

<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name2</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name3</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
<b>Company Name3</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name4</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name5</b> Subpoenas & Investigations May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name5</b> Subpoenas & Investigations May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name2</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name3</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Bedrock AI Overview Screening Watchlist User Guid  Profile details

AI Restatements Subpoenas & Investigations Holdings/Turnover Miscellaneous High Risk SEC Comment Letters All/Non-Timely Filings Cash Flow & Credit Filter

Overview → all 38 News See only my profile

<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name2</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name3</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
<b>Company Name3</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name4</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name5</b> Subpoenas & Investigations May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name5</b> Subpoenas & Investigations May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name1</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name2</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	<b>Company Name3</b> Restatements May 3, 2022   \$130B   72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

# Usability Tests Results

## Round 1 findings

- 1 Show recent high impact information
- 2 Refresh feeds based on customer's preferences
- 3 Make feed types easily discoverable in the feed

## Round 2 findings

- 1 Make NT & SEC recognizable
- 2 News Feed | My companies
- 3 Take "Remove SPACs" out of filters

# Refining the design

- Design iteration
- High-fidelity prototype
- Accessibility audit

# Design Iteration

Before usability study

After usability study

Two divided feeds

Red flag Feed | My Portfolio

Toggle to Remove SPACs

Transfer SPACs from filters to the main page

The screenshot shows a web application interface titled 'Bedrock AI' with a navigation bar containing 'Overview', 'Screening', 'Watchlist', and 'User Guide'. Below the navigation bar is a search bar and a 'Red Flag Feed' section. The feed displays a grid of 20 items, each with a 'Red Flag' icon and a 'Remove' button. The items are arranged in a 4x5 grid. The first item in the grid is 'Company Name1' with a 'Red Flag' icon and a 'Remove' button. The second item is 'Company Name2' with a 'Red Flag' icon and a 'Remove' button. The third item is 'Company Name3' with a 'Red Flag' icon and a 'Remove' button. The fourth item is 'Company Name4' with a 'Red Flag' icon and a 'Remove' button. The fifth item is 'Company Name5' with a 'Red Flag' icon and a 'Remove' button. The sixth item is 'Company Name6' with a 'Red Flag' icon and a 'Remove' button. The seventh item is 'Company Name7' with a 'Red Flag' icon and a 'Remove' button. The eighth item is 'Company Name8' with a 'Red Flag' icon and a 'Remove' button. The ninth item is 'Company Name9' with a 'Red Flag' icon and a 'Remove' button. The tenth item is 'Company Name10' with a 'Red Flag' icon and a 'Remove' button. The eleventh item is 'Company Name11' with a 'Red Flag' icon and a 'Remove' button. The twelfth item is 'Company Name12' with a 'Red Flag' icon and a 'Remove' button. The thirteenth item is 'Company Name13' with a 'Red Flag' icon and a 'Remove' button. The fourteenth item is 'Company Name14' with a 'Red Flag' icon and a 'Remove' button. The fifteenth item is 'Company Name15' with a 'Red Flag' icon and a 'Remove' button. The sixteenth item is 'Company Name16' with a 'Red Flag' icon and a 'Remove' button. The seventeenth item is 'Company Name17' with a 'Red Flag' icon and a 'Remove' button. The eighteenth item is 'Company Name18' with a 'Red Flag' icon and a 'Remove' button. The nineteenth item is 'Company Name19' with a 'Red Flag' icon and a 'Remove' button. The twentieth item is 'Company Name20' with a 'Red Flag' icon and a 'Remove' button.

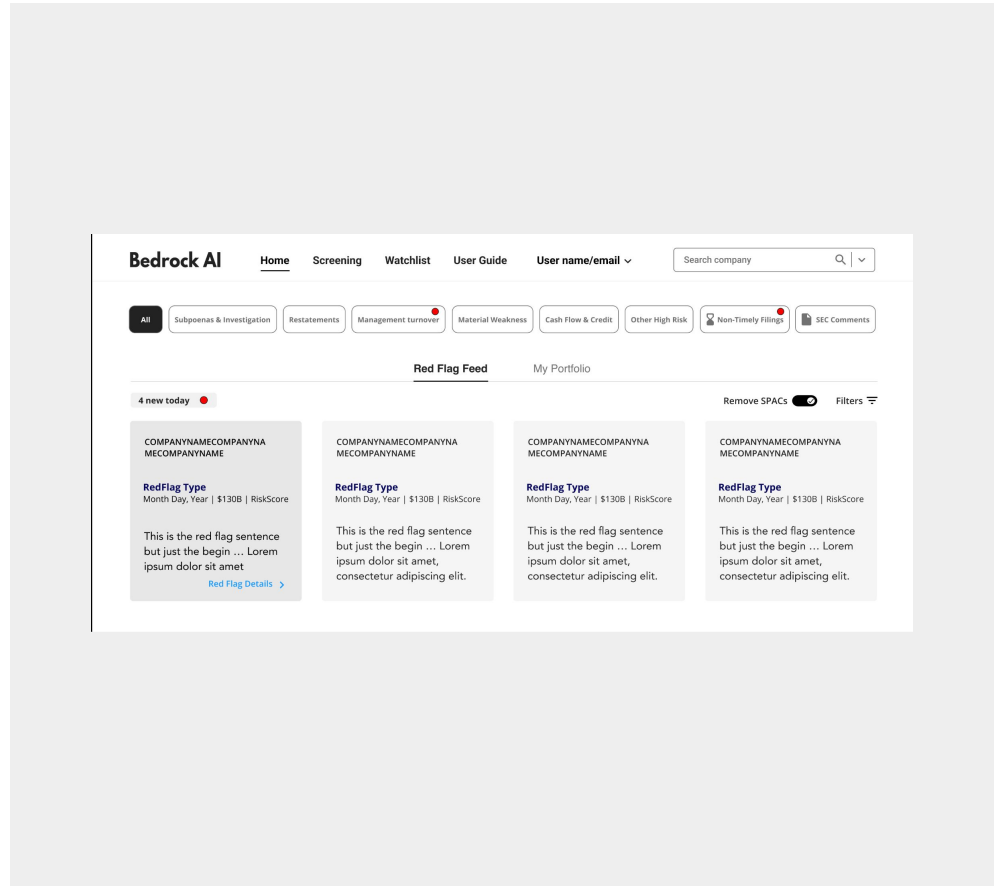


The screenshot shows the updated web application interface. The navigation bar remains the same, but the 'Red Flag Feed' section has been redesigned. The items are now arranged in a 4x5 grid, and the 'Remove' buttons are now integrated into the main content area. The 'Red Flag' icons are no longer present. The first item in the grid is 'Company Name1' with a 'Remove' button. The second item is 'Company Name2' with a 'Remove' button. The third item is 'Company Name3' with a 'Remove' button. The fourth item is 'Company Name4' with a 'Remove' button. The fifth item is 'Company Name5' with a 'Remove' button. The sixth item is 'Company Name6' with a 'Remove' button. The seventh item is 'Company Name7' with a 'Remove' button. The eighth item is 'Company Name8' with a 'Remove' button. The ninth item is 'Company Name9' with a 'Remove' button. The tenth item is 'Company Name10' with a 'Remove' button. The eleventh item is 'Company Name11' with a 'Remove' button. The twelfth item is 'Company Name12' with a 'Remove' button. The thirteenth item is 'Company Name13' with a 'Remove' button. The fourteenth item is 'Company Name14' with a 'Remove' button. The fifteenth item is 'Company Name15' with a 'Remove' button. The sixteenth item is 'Company Name16' with a 'Remove' button. The seventeenth item is 'Company Name17' with a 'Remove' button. The eighteenth item is 'Company Name18' with a 'Remove' button. The nineteenth item is 'Company Name19' with a 'Remove' button. The twentieth item is 'Company Name20' with a 'Remove' button.



# High-fidelity Prototype

[Link](#)



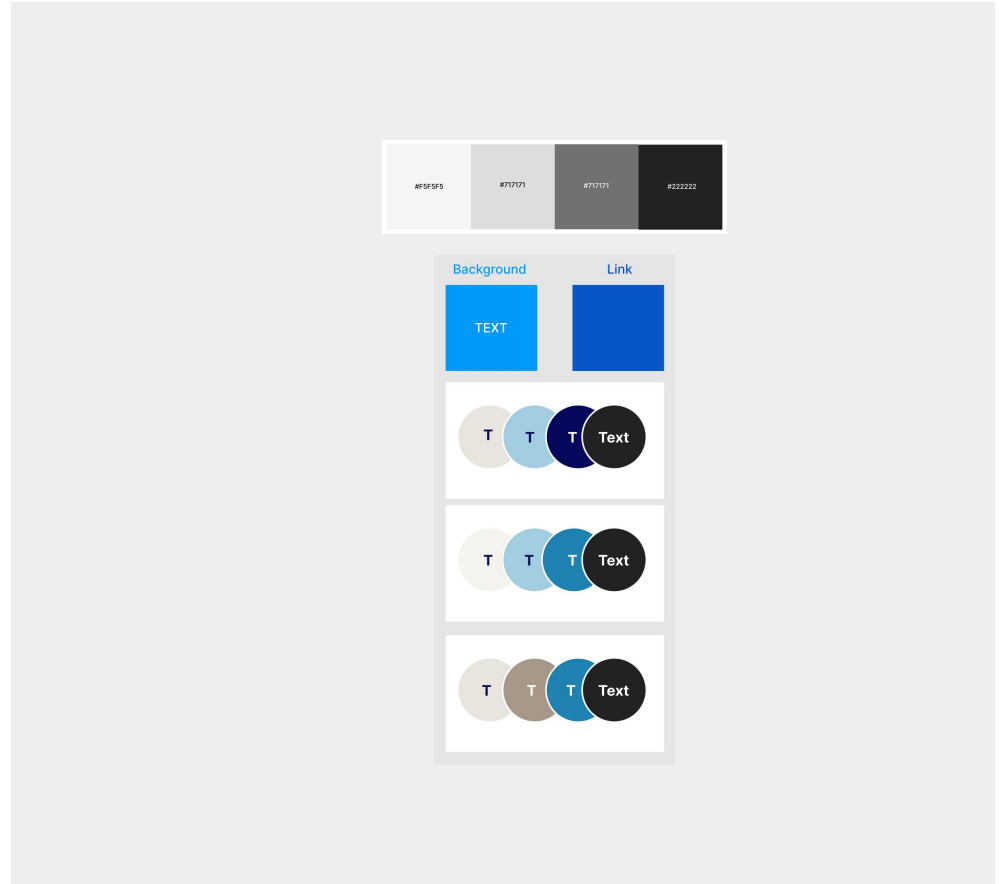


# Style Guide

## Colour palette

In the end, we decided to go with neutral black and white colour palette due to:

- Informative content
- Colourful design system
- Financial product
- End-users | men (25-55) | No visual
- Accessible



# Accessibility Audit (Now & Then)

1

## Applying Signs to Specify Recognition

The screenshot shows the 'Bedrock AI' application interface. At the top, there is a navigation bar with 'Home', 'Screening', 'Watchlist', and 'User Guide'. Below this is a search bar and a set of filter buttons including 'All', 'Subsides & Investigations', 'Resolutions', 'Management turnover', 'Material Weakness', 'Cash Flow & Credit', 'Other High Risk', 'New Tenders Filings', and 'SEC Comments'. The main content area is titled 'Red Flag Feed' and displays a grid of eight items. Each item has a red flag icon, a title, and a brief description. The titles include 'Management turnover', 'Non-Timely Filings', 'Cash Flow & Credit', 'SEC Comments', and 'Management turnover'.

2

## Error Messages

The screenshot shows the 'Filters' section of the application. It contains three filter categories: 'Company Risk Score Rang', 'Market Cap Range (\$M)', and 'Dollar Volume Range (\$M)'. Each category has two input fields for 'min' and 'max' values. In the 'Company Risk Score Rang' section, the 'max risk score' field contains the value '150' and has a red error message: 'The maximum "Risk score" can not be more than 100.' The other filter sections are currently empty.

3

## Chips-List

The screenshot shows the 'Filters' section of the application, specifically the 'Sectors' filter. It features a 'Multiple' dropdown menu and a list of sector chips, each with a checkmark indicating it is selected. The selected sectors are: Communication, Consumer Cyclical, Consumer Defensive, Energy, Financial Services, Healthcare, Industrials, Materials & Mining, Real Estate, Services, and Utilities. There are also unselected chips for 'SPAC' and 'Technology'. At the bottom, there is a 'Remove SPACs' toggle switch.

Bedrock AI Overview Screening Watchlist User Guide shelda@bedrock-ai.com Enter / Select company

Visit the SEC comment letter screening tool

### New and Notable 8-Ks

**GOHEALTH INC (GOCC)**  
May 27, 2022 | \$344.9M  
Delisting

On May 25, 2022, GoHealth, Inc. (the "Company") received written notice (the "Notice") from the Listing Qualifications Department of The Nasdaq Stock Market ("Nasdaq") notifying the Company that, based on the closing bid price of the Company's Class A common stock, par value \$0.0001 per share (the "Common Stock"), for the last 30 consecutive business days, the Company no longer complies with the minimum bid price requirement for continued listing on The Nasdaq Global Market.

Nasdaq Listing Rule 5450(a)(1) requires listed securities to maintain a minimum bid price of \$1.00 per share (the "Minimum Bid Price Requirement"), and Nasdaq Listing Rule 5810(c)(3)(A) provides that a failure to meet the Minimum Bid Price Requirement exists if the deficiency continues for a period of 30 consecutive business days.

**CLOVER HEALTH INVESTMENTS CORP DE (CLOV)**  
May 27, 2022 | \$1.2B  
Resignation or Appointment

On May 26, 2022, Nathaniel S. Turner resigned as a member of the Board of Directors of Clover Health Investments, Corp. ("Clover" or the "Company").

**ARDELYX INC (ARDX)**  
May 27, 2022 | \$103.5M  
Delisting

Item 3.01 Notice of Delisting or Failure to Satisfy a Continued Listing Rule or Standard; Transfer of Listing On May 23, 2022, we received a letter from The Nasdaq Global Market ("Nasdaq") indicating that we have failed to comply with the minimum bid price requirement of Nasdaq Listing Rule 5450(a)(1).

**HELIX ENERGY SOLUTIONS GROUP INC (HLX)**  
May 27, 2022 | \$583.8M  
Resignation or Appointment

Following certification of the vote of the Company's 2022 Annual Meeting of Shareholders, in accordance with the Guidelines on May 18, 2022 Jan Rask tendered his offer of resignation.

### Top Red Flags from last week

**ROBINHOOD MARKETS INC (HOOD)** May 16, 2022 | 8-K | \$8.4B  
Robinhood announced the resignation of one of its Board of Directors, Scott Sandell, effective May 12, 2022. Mr. Sandell had been a board member since 2016.

**PELOTON INTERACTIVE INC (PTON)** May 10, 2022 | 10-Q | \$5.3B  
Peloton recognized over \$200 million of impairment charges as the company continued to report declining revenues. Furthermore, on May 6, 2022, PTON announced the resignation of one of its board members, William Lynch.

**CARNIVAL PLC (CUK)** May 16, 2022 | 8-K | \$16.3B  
Carnival announced the resignation of its Chief Ethics and Compliance Officer, Peter C. Anderson, effective May 16, 2022.

### Selected Recent Filings

Company name	Filing date	Filing type	Risk Score
SANDERSON FARMS INC (SAFM)	May 27, 2022	10-Q	🔴
BJ'S WHOLESALE CLUB HOLDINGS INC (BJ)	May 27, 2022	10-Q	🔴
LOOP INDUSTRIES INC (LOOP)	May 27, 2022	10-K	🔴
WORLD ACCEPTANCE CORP (WRLD)	May 27, 2022	10-K	🔴
PLANTRONICS INC CA (POLY)	May 27, 2022	10-K	🔴
DIGITAL WORLD ACQUISITION CORP (DWAC)	May 27, 2022	S-1	🔴
TARGET CORP (TGT)	May 27, 2022	10-Q	🔴
GAP INC (GPS)	May 27, 2022	10-Q	🔴
DECKERS OUTDOOR CORP (DECK)	May 27, 2022	10-K	🔴
NORDSON CORP (NDSN)	May 27, 2022	10-Q	🔴
TJX COMPANIES INC DE (TJX)	May 27, 2022	10-Q	🔴
UNIVERSAL CORP VA (UVV)	May 27, 2022	10-K	🔴
NVIDIA CORP (NVDA)	May 27, 2022	10-Q	🔴

Before

After

Bedrock AI Home Screening Watchlist User Guide User name/email Search company

All Subpoenas & Investigation Restatements Management turnover Material Weakness Cash Flow & Credit Other High Risk Non-Timely Filings SEC Comments

### Red Flag Feed

My Portfolio Remove SPACs Filters

4 new today

**COMPANYNAMECOMPANYNA** 🔴  
MECOMPANYNAME

**Management turnover**  
Month Day, Year | \$130B | RiskScore

This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**COMPANYNAMECOMPANYNA** 🔴  
MECOMPANYNAME

**Management turnover**  
Month Day, Year | \$130B | RiskScore

This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**COMPANYNAMECOMPANYNA** 🔴  
MECOMPANYNAME

**Non-Timely Filings**  
Month Day, Year | \$130B | RiskScore

This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**COMPANYNAMECOMPANYNA** 🔴  
MECOMPANYNAME

**Non-Timely Filings**  
Month Day, Year | \$130B | RiskScore

This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**COMPANYNAMECOMPANYNA** 🔴  
MECOMPANYNAME

**Cash Flow & Credit**  
Month Day, Year | \$130B | RiskScore

This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**COMPANYNAMECOMPANYNA** 🔴  
MECOMPANYNAME

**SEC Comments**  
Month Day, Year | \$130B | RiskScore

This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**COMPANYNAMECOMPANYNA** 🔴  
MECOMPANYNAME

**SEC Comments**  
Month Day, Year | \$130B | RiskScore

This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**COMPANYNAMECOMPANYNA** 🔴  
MECOMPANYNAME

**Management turnover**  
Month Day, Year | \$130B | RiskScore

This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

# Going forward

---

- Takeaways
- Next steps

# Takeaways



## Impact:

New designs raised subscription rate significantly having a direct impact on revenues.

Increased landing page views by 14X and users are more engaged with CTAs compared to the old version.



## What I learned:

Focusing on user needs before entering the solution phase.

Auditing designs for accessibility for any product increases the usability.

Conducting usability tests on any solution gives us clarity on improvements for next iterations.

# Next Steps

1

## Specify NEW flags

The screenshot shows the 'Red Flag Feed' section of the Bedrock AI interface. It features a grid of 12 items, each with a red flag icon and a title. The titles include 'Management turnover', 'Cash Flow & Credit', 'Non-Timely Filings', and 'SEC Comments'. Each item has a brief description and a 'RiskScore' indicator. The interface includes a search bar at the top and navigation tabs for 'Overview', 'Screening', 'Watchlist', and 'User Guid'.

2

## Shortcut to Modify Watchlist

The screenshot shows the 'Red Flag Feed' section of the Bedrock AI interface. The main content area is empty, displaying the message 'You do not have any portfolio watchlist.' Below this message is a 'Make my portfolio' button. A modal dialog titled 'Make portfolio watchlist' is open, showing a search bar and a list of items to be added to the watchlist. The modal includes a 'Filter by' section with radio buttons for 'All', 'New', 'High Risk', 'Low Risk', 'High', and 'Low'. The 'All' filter is selected. The modal also includes a 'Save' button and a 'Cancel' button.

3

## Horizontal Scrollable Menu

The screenshot shows the 'Red Flag Feed' section of the Bedrock AI interface. The main content area is a grid of 12 items, each with a red flag icon and a title. The titles include 'Management turnover', 'Cash Flow & Credit', 'Non-Timely Filings', and 'SEC Comments'. Each item has a brief description and a 'RiskScore' indicator. The interface includes a search bar at the top and navigation tabs for 'Overview', 'Screening', 'Watchlist', and 'User Guid'. The 'Red Flag Feed' section is highlighted, and the items are arranged in a grid that can be scrolled horizontally.

