

**Increased the visibility of high-impact information
by redesigning an AI-generated news feed, resulting
in a 14-fold boost in user engagement**

Bedrock AI

Real-time AI-driven financial software, FinTech / SaaS / B2B

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 of investing in the capital market.**

Project overview



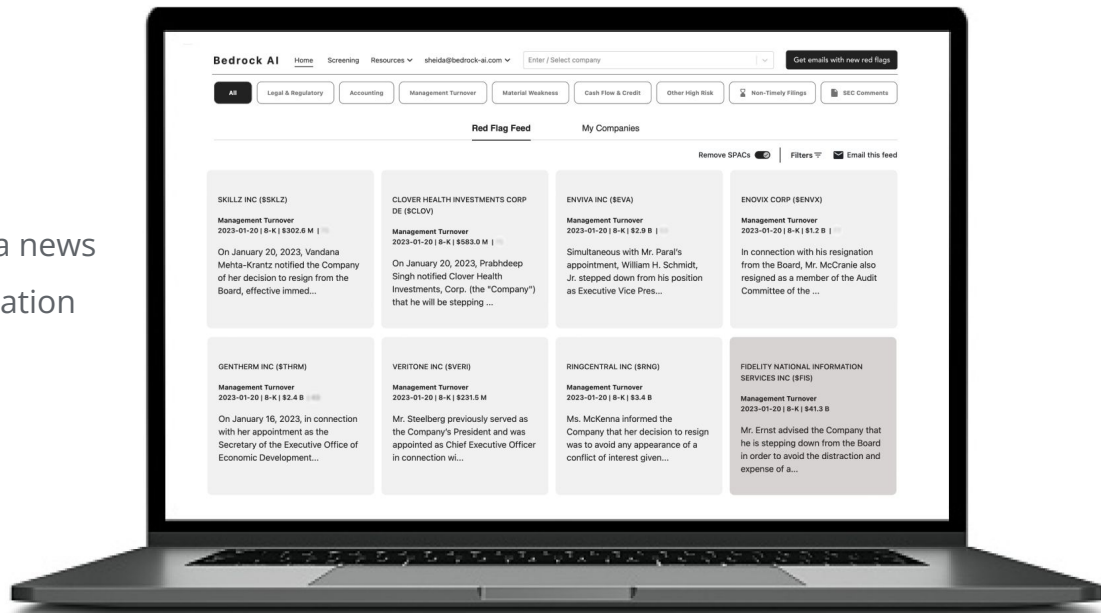
The project brief:

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



Project duration:

Q2-Q3 2022



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 personas
- 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.

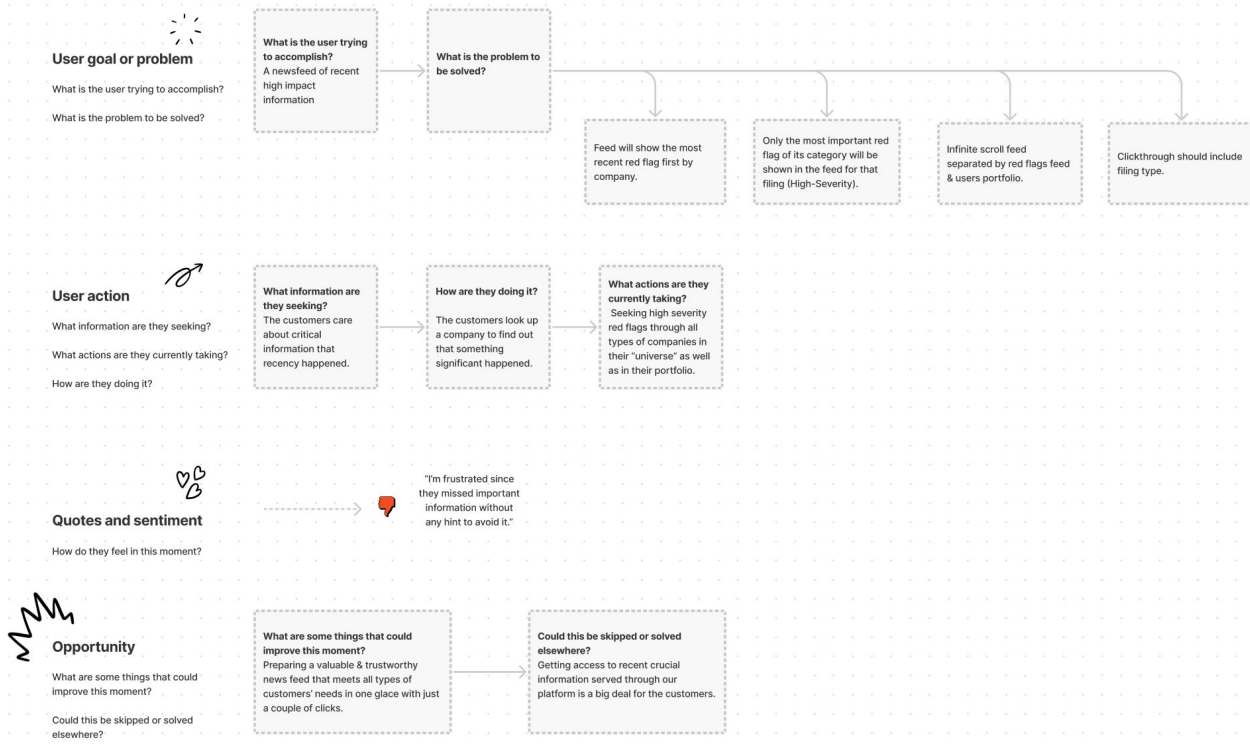
Luke Constable is an analyst & trader who Manages small long-short hedge fund. He needs to get access to recent critical information of high impact red flags on loading the dashboard because that will help him to take immediate action.

Problem statements

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

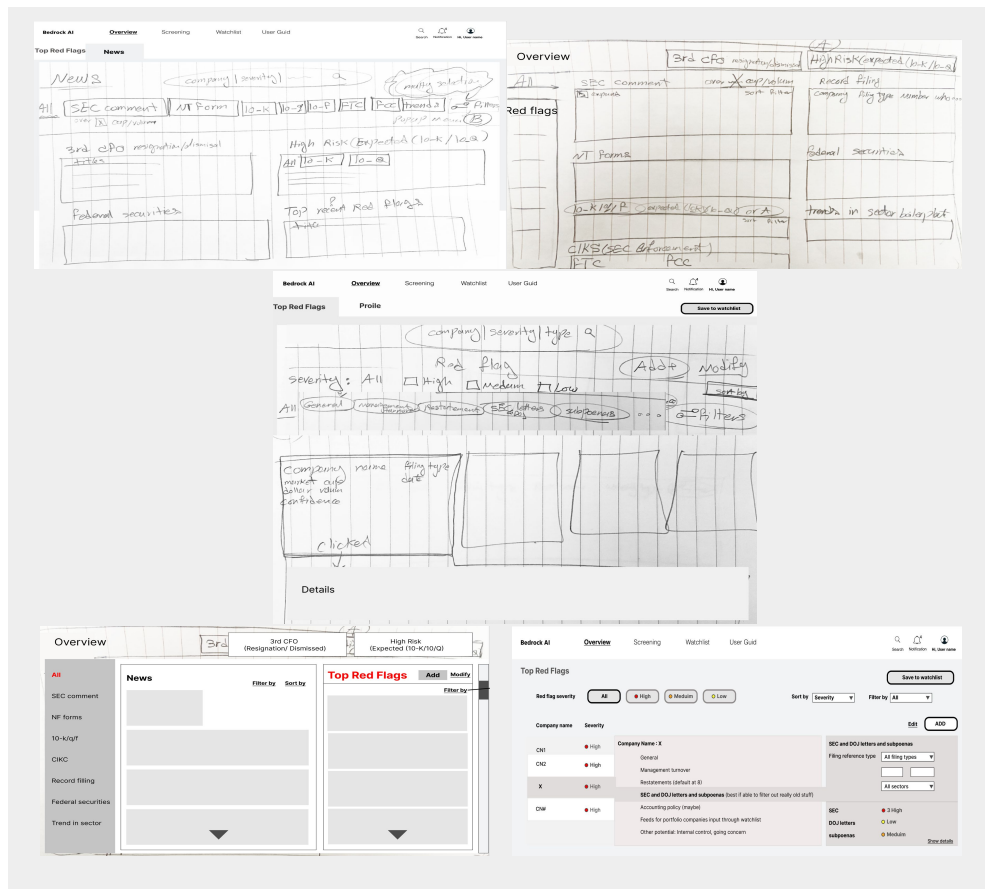
Luke is an **analyst & trader** who manages a small long-short hedge fund. He **needs to get access to recent critical information of high impact red flags** as a feed on loading the dashboard **because that will help him to take immediate action.**

Journey map overview



Sketching ideas

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



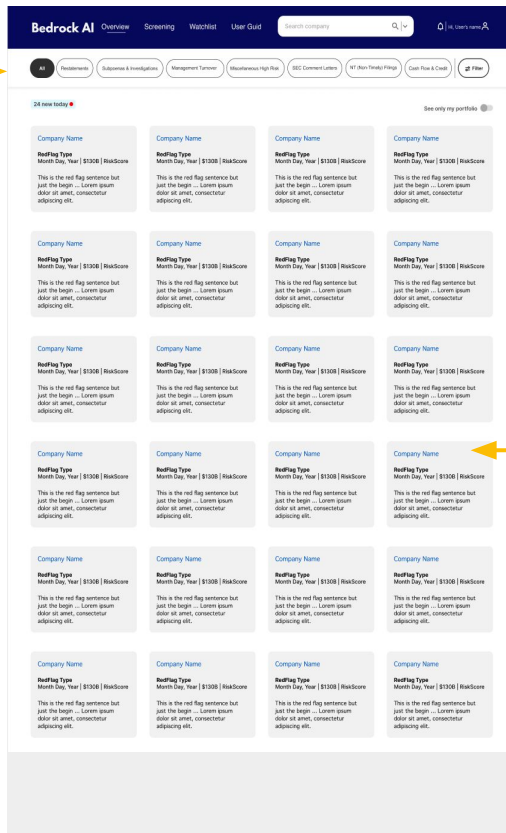
Wireframes

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)

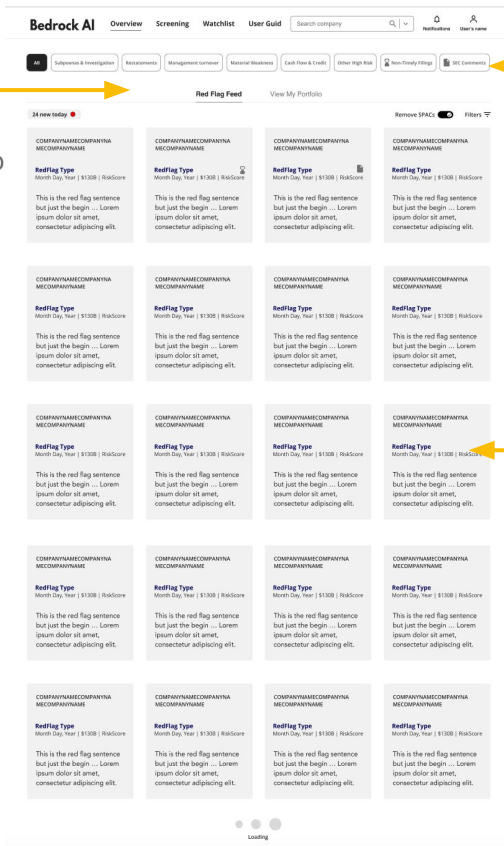
Wireframes

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

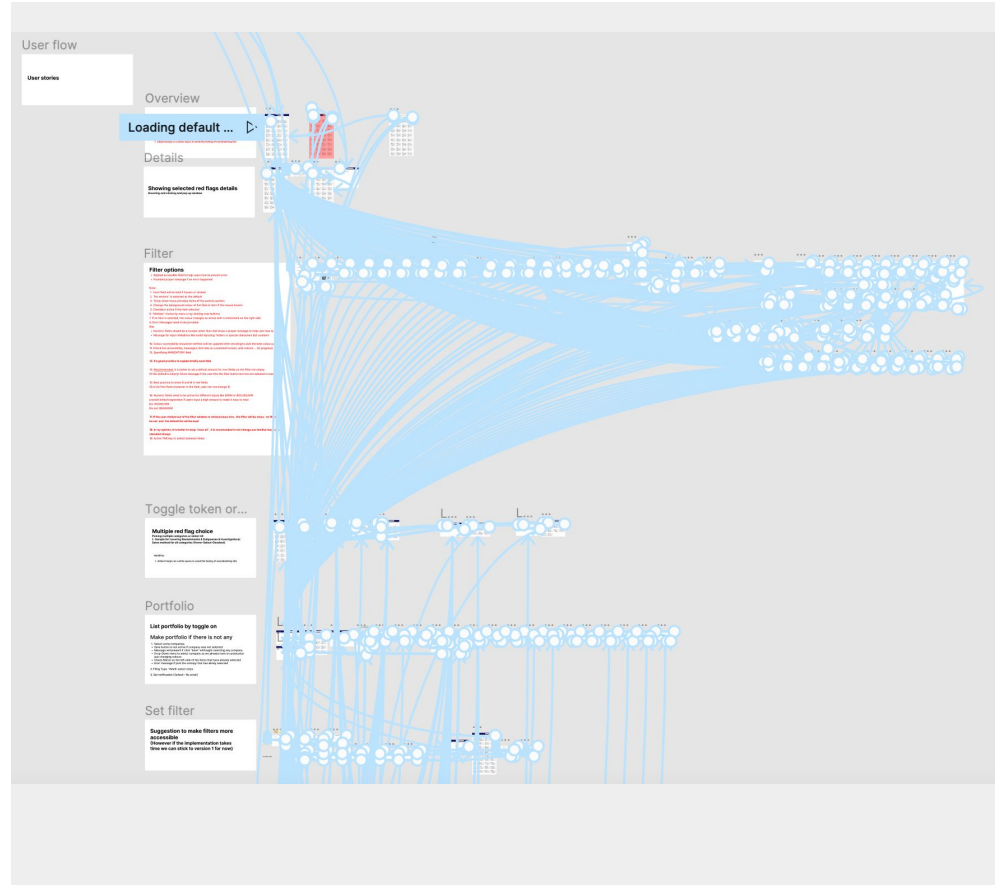
Prototyping

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)



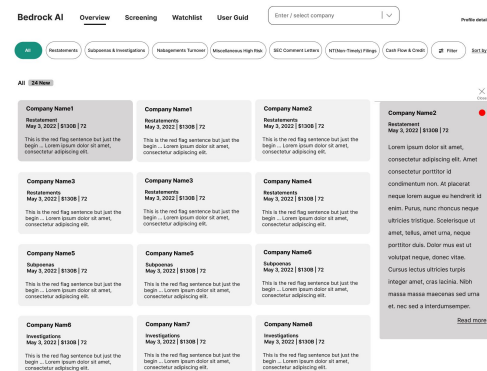
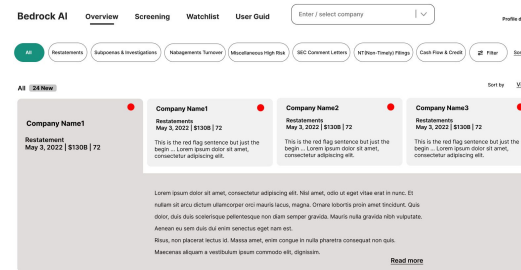
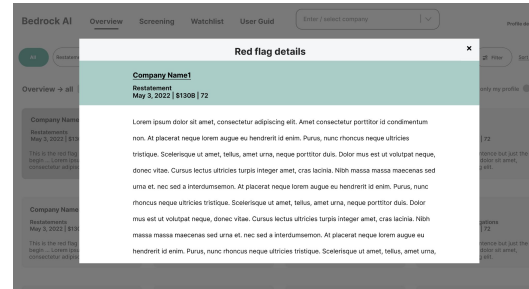
Hi-fid overview: How to display details?



The feature to represent red flag details:

Three ideas

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



Hi-fid 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

Company Name1 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Company Name1 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Company Name2 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Company Name3 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Company Name3 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Company Name4 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Company Name5 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.	Company Name5 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.
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Hi-fid 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

Company Name1 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Company Name1 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Company Name2 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Company Name3 Restatements May 3, 2022 \$130B 72 This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
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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

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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 for 'Bedrock AI'. The top navigation bar includes 'Overview', 'Screening', 'Watchlist', and 'User Guide'. A search bar is present. Below the navigation, there are tabs for 'Overview', 'Response & Insights', 'My Portfolio', 'My Watchlist', 'My Connections', 'My Feed', and 'My Alerts'. The main content area is titled 'Overview' and displays a grid of 20 feed items. Each item has a 'Company Name', 'Red Flag Feed' status, and a 'Red Flag Type' (e.g., 'Red Flag Type: This is the red flag sentence but just the begin...'). A green arrow points from this interface towards the 'After usability study' interface.

The screenshot shows the updated web application interface after usability study. The top navigation bar is similar, but the 'My Portfolio' tab is highlighted. The main content area is titled 'Red Flag Feed' and displays a grid of 20 feed items. A toggle switch labeled 'Remove SPACs' is visible in the top right corner of the feed area. The feed items are similar to the 'Before' interface but with updated content. A green arrow points from the 'Before' interface to this one.

Design iteration

The screenshot shows the Bedrock AI dashboard with a navigation bar at the top containing 'Overview', 'Screening', 'Watchlist', and 'User Grid'. Below the navigation bar is a search bar and a 'View My Portfolio' button. The main content area is a grid of 20 'Red Flag Feed' items, each with a 'Heating Type' dropdown and a 'Status' indicator. The items are arranged in a 4x5 grid. At the bottom of the page, there is a 'Loading' indicator.

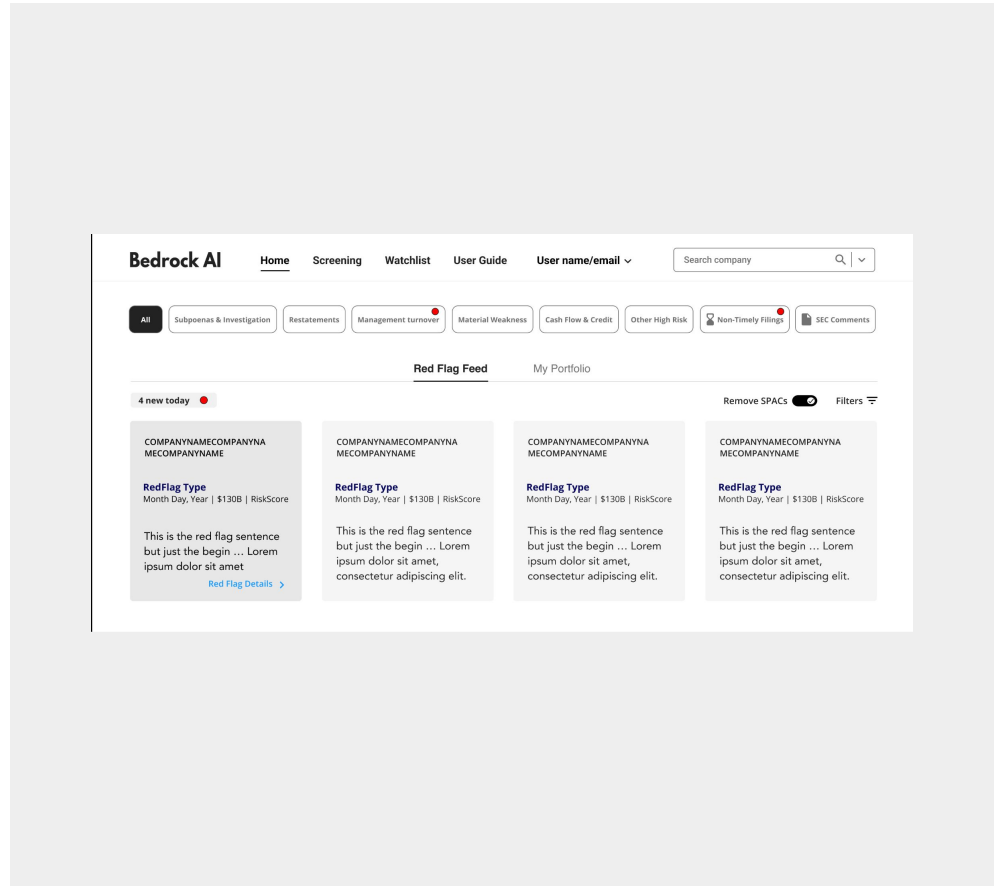
This screenshot shows the same Bedrock AI dashboard as the previous one, but with a 'Red Flag details' modal window open. The modal displays information for a 'Company Item' dated 'May 8, 2022 (\$108.7)'. It includes a 'Status' indicator, a 'Heating Type' dropdown, and a 'Status' indicator. The modal also contains a 'Close' button. The background grid of items is visible but slightly dimmed.

This screenshot shows the Bedrock AI dashboard with a grid of 20 'Red Flag Feed' items, similar to the first screenshot. The layout and navigation elements are consistent. At the bottom of the page, there is a 'Loading' indicator.

This screenshot shows the Bedrock AI dashboard with a message overlay that reads 'You do not have any portfolio watchlist.' Below the message, there is a section titled 'Do you want to add companies to your Portfolio?' with a 'Click on Watchlist' button and an 'OR' separator. Below that, there is a 'Send a list of tickers to info@bedrock.ai.com' button. At the bottom of the page, there is a 'Loading' indicator.

High-fid Prototype

[Link](#)

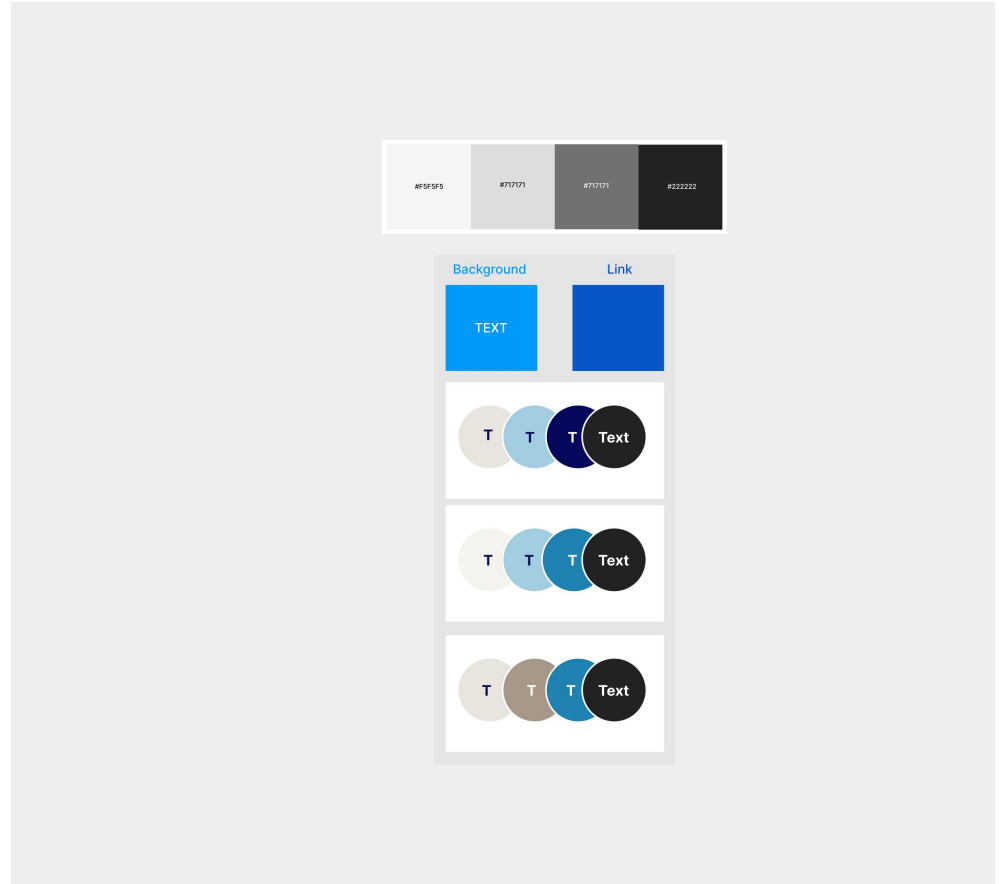


Style guide

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

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

Management turnover Material Weakness Cash Flow & Credits Other High Risk New Tenders Filings SEC Comments

4 new today My Portfolio Remove SPACs Filters

COMPANYNAMECOMPANYNA MECOMPANYNAME	COMPANYNAMECOMPANYNA MECOMPANYNAME	COMPANYNAMECOMPANYNA MECOMPANYNAME	COMPANYNAMECOMPANYNA MECOMPANYNAME
Management turnover Month, Day, Year RiskScore	Management turnover Month, Day, Year RiskScore	Non-Timely Filings Month, Day, Year RiskScore	Non-Timely Filings Month, Day, Year RiskScore
This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	This is the red flag sentence but just the begin ... Lorem ipsum dolor sit amet, consectetur adipiscing elit.
Cash Flow & Credits Month, Day, Year RiskScore	SEC Comments Month, Day, Year RiskScore	SEC Comments Month, Day, Year RiskScore	Management turnover Month, Day, Year RiskScore
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2

Error Messages

Filters

Company Risk Score Rang

min risk score 0 - max risk score 150 X
The maximum "Risk score" can not be more than 100.

Market Cap Range (\$M)

min market cap \$ 300 - max market cap \$ Max

Dollar Volume Range (\$M)

min dollar volume \$ 2 - max dollar volume \$ Max

3

Chips-List

Filters

Dollar Volume Range (\$M)

min dollar volume \$ 2 - max dollar volume \$ Max

Sectors

Multiple

- Communication ✓
- Consumer Cyclical ✓
- Consumer Defensive ✓
- Energy ✓
- Financial Services ✓
- Healthcare ✓
- Industrials ✓
- Materials & Mining ✓
- Real Estate ✓
- Services ✓

SPAC Technology ✓ Utilities ✓

Remove SPACs

Before

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 26, 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 | \$1.28
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 | \$8.48
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.

PELTON INTERACTIVE INC (PTON) May 10, 2022 | 10-Q | \$5.38
Pelton 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 | \$16.38
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	

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

4 new today

Remove SPACs Filters

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
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Going forward

- Takeaways
- Next steps

14 times

Increase in user engagement

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 add to the watchlist. The modal includes a 'Filter by' dropdown and a 'Save' 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'. A horizontal scrollable menu is visible at the top of the grid, allowing users to filter items by flag type.

Next Steps

4

Bookmark

Bedrock AI | Overview | Screening | Watchlist | User Guide | Search company | Profile avatar

41 | Restatements | Subpoenas & Investigations | Subpoenas Turnover | Abscondence High Risk | SEC Comment Letters | With No Ties to Filing | Cash Flow & Debt | Filter

Overview → Restatements | Subpoenas & Investigations | See only my portfolio

Restatements

Company Name1	Company Name1	Company Name2	Company Name3
Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72
This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.	This is the red flag sentence but just the begin... Lorem ipsum dolor sit amet, consectetur adipiscing elit.

See more

Subpoenas & Investigations

Company Name1	Company Name1	Company Name2	Company Name1
Subpoenas & Investigations May 2, 2022 \$1306 72	Subpoenas & Investigations May 3, 2022 \$1306 72	Subpoenas & Investigations May 3, 2022 \$1306 72	Subpoenas & Investigations May 3, 2022 \$1306 72
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Restatements

Company Name1	Company Name1	Company Name2	Company Name3
Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72
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Company Name1	Company Name1	Company Name2	Company Name3
Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72
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Company Name1	Company Name1	Company Name2	Company Name3
Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72	Restatements May 3, 2022 \$1306 72
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Subpoenas & Investigations

Company Name1	Company Name1	Company Name2	Company Name1
Subpoenas & Investigations May 2, 2022 \$1306 72	Subpoenas & Investigations May 3, 2022 \$1306 72	Subpoenas & Investigations May 3, 2022 \$1306 72	Subpoenas & Investigations May 3, 2022 \$1306 72
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