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

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Bedrock AI

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

Google

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.**

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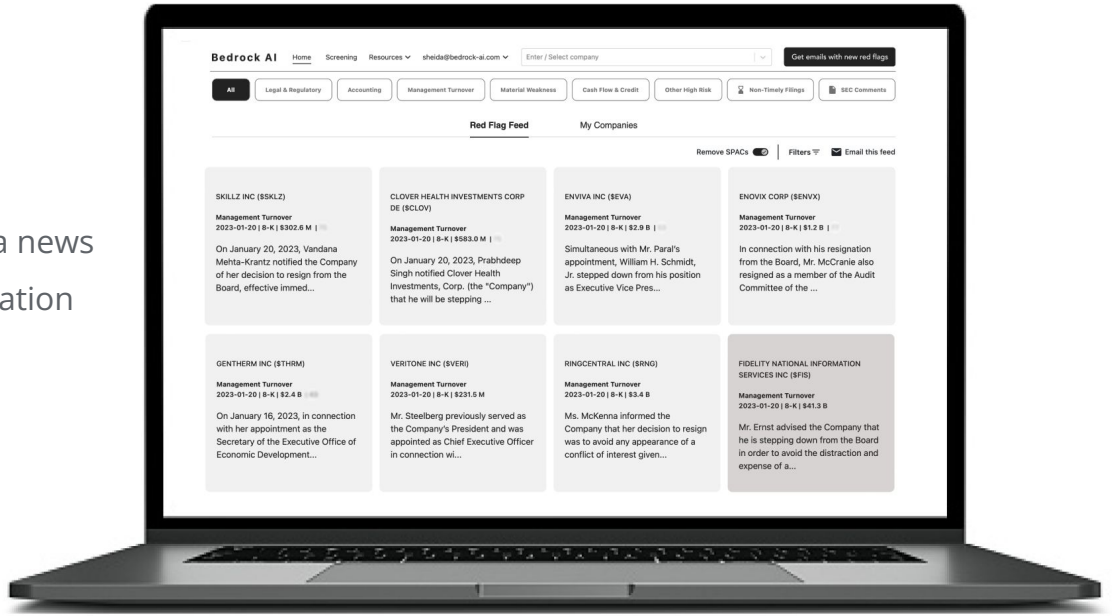
Project overview

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.

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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

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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

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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.

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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.

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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.**

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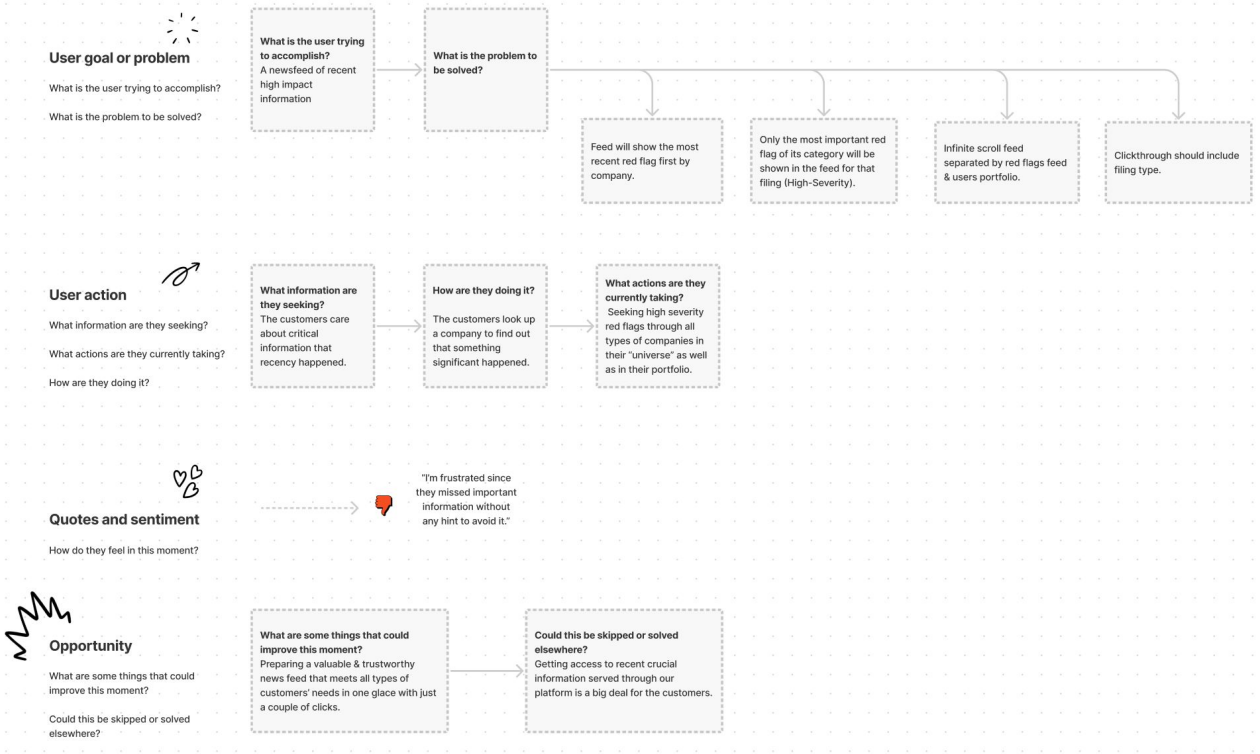
Journey map overview

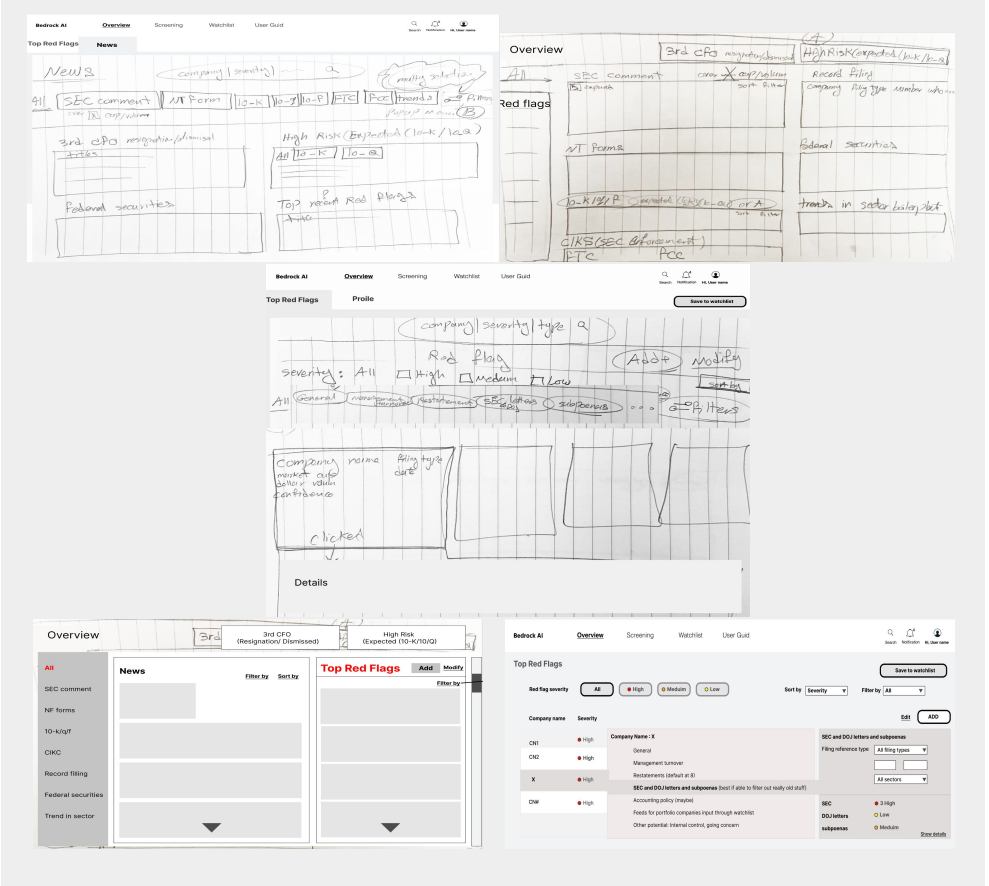


Ideating on solutions

- Sketching ideas
- Wireframing
- Mid & High-fidelity prototype
- Usability testing

Sketching ideas

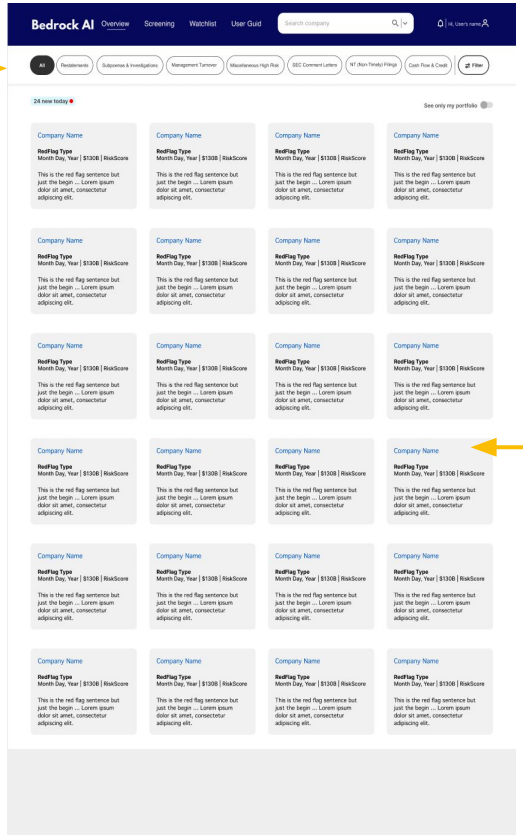
Created about five initial rough designs to facilitate customers accomplishing their goals based on user research findings.



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)

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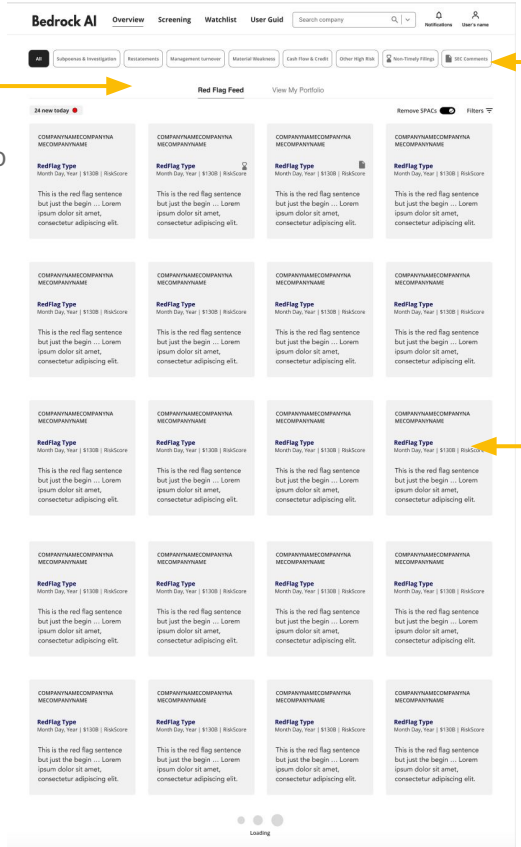
Wireframes

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

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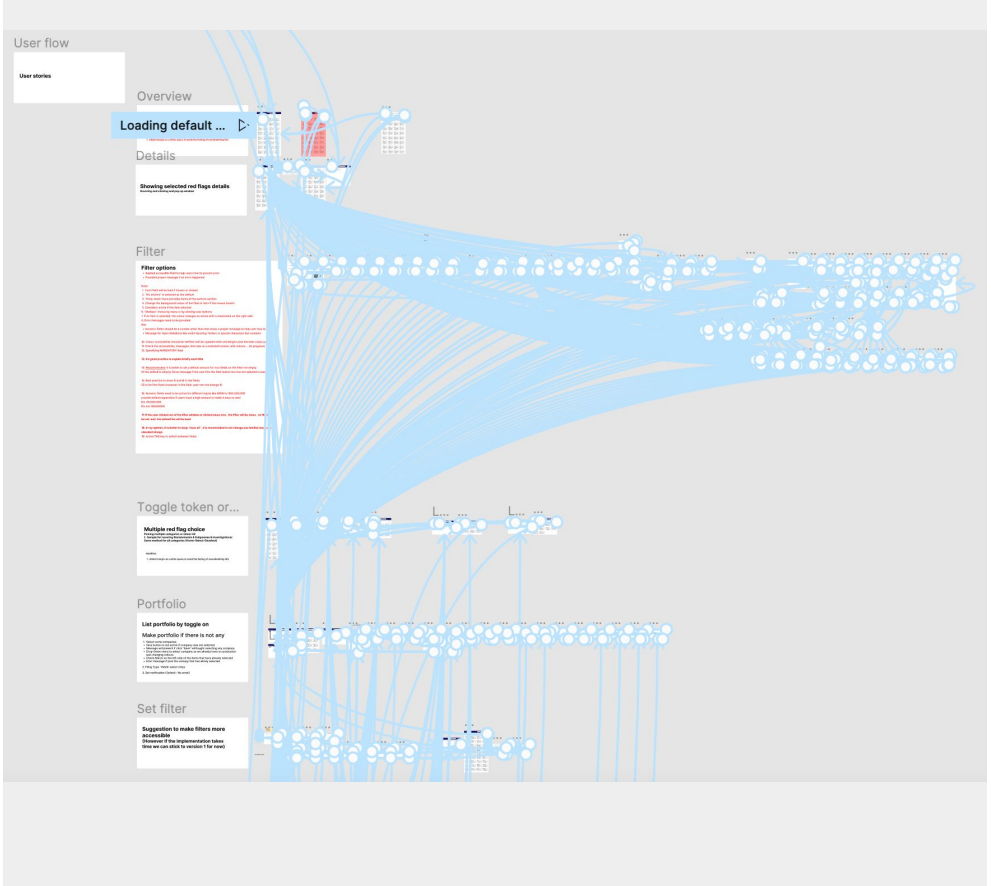
Prototyping

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)



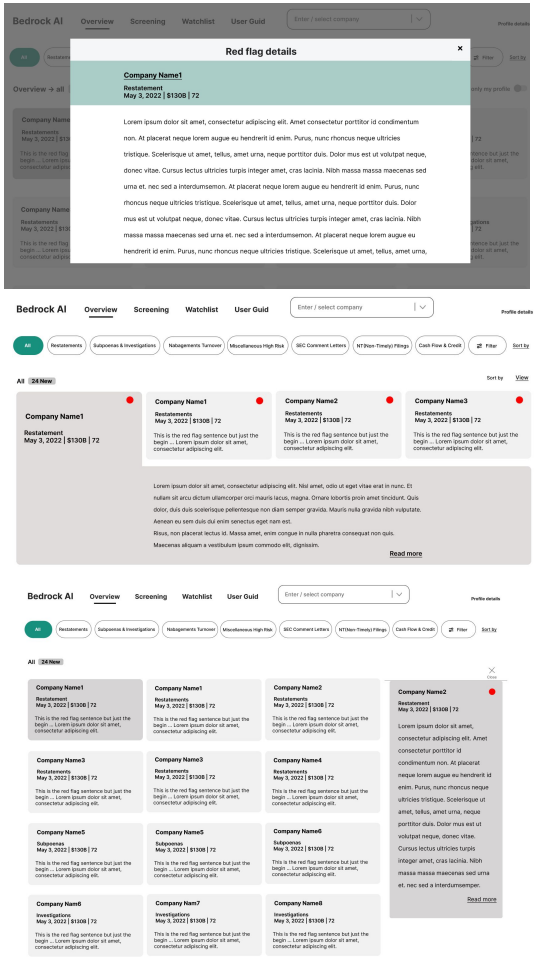
Hi-fid overview:

How to display details?

The feature to represent red flag details:

Three ideas

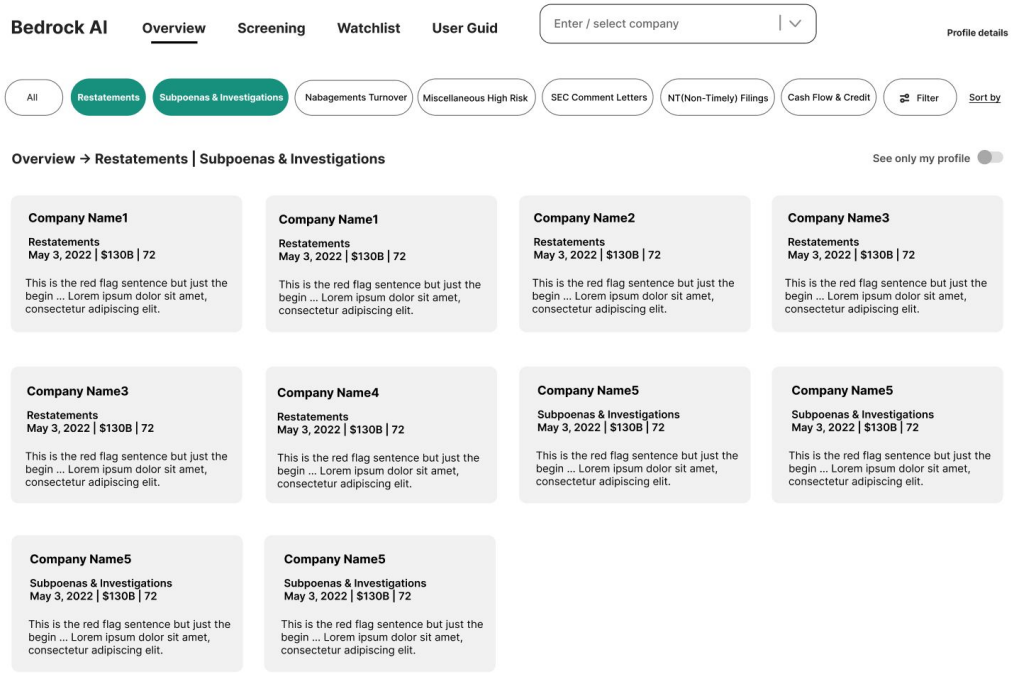
1. Pop up window
2. Drop down
3. Slide show



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.



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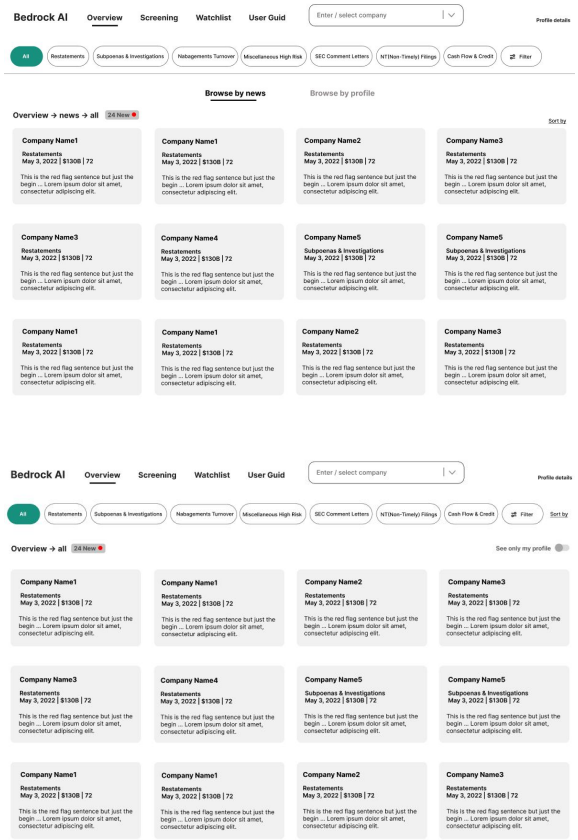
Hi-fid overview:

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.



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

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Refining the design

- Design iteration
- High-fidelity prototype
- Accessibility audit

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Design iteration

Two divided feeds

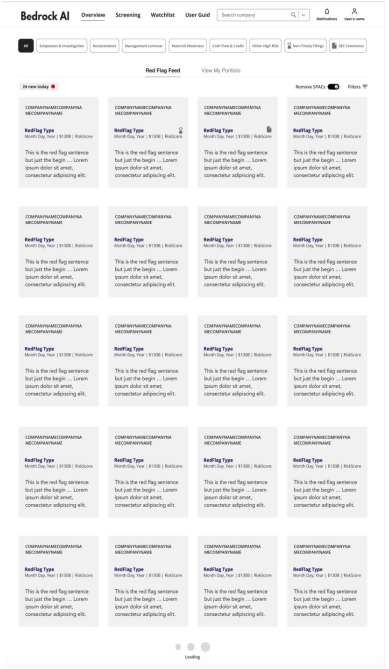
Red flag Feed | My Portfolio

Toggle to Remove SPACs

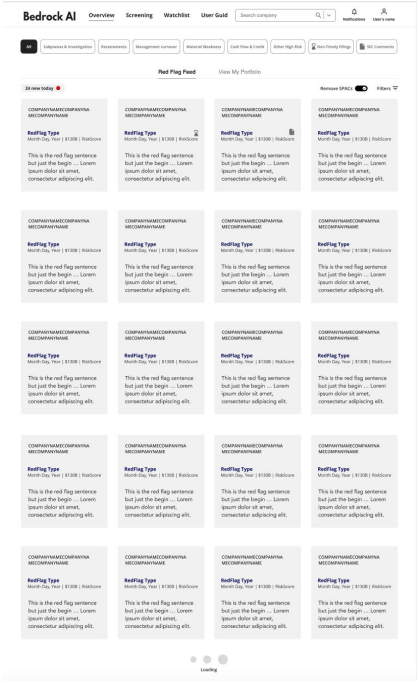
Transfer SPACs from filters to the main page

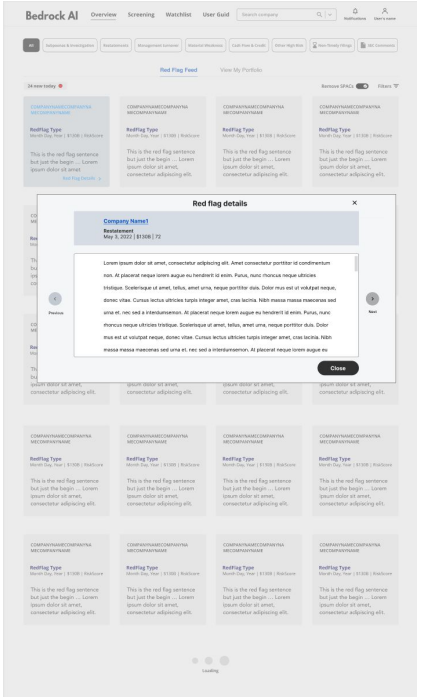
Before usability study

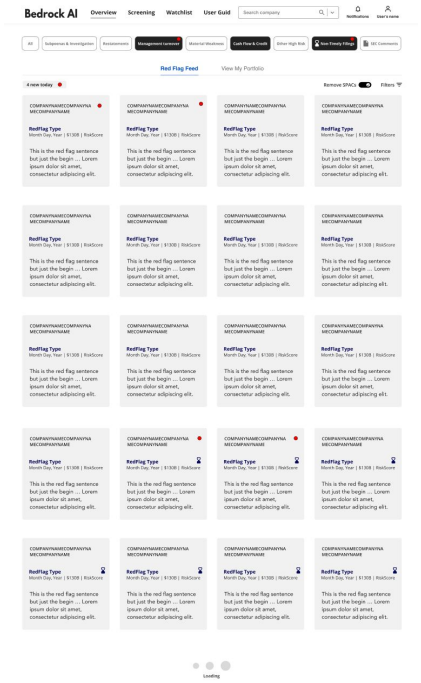
After usability study

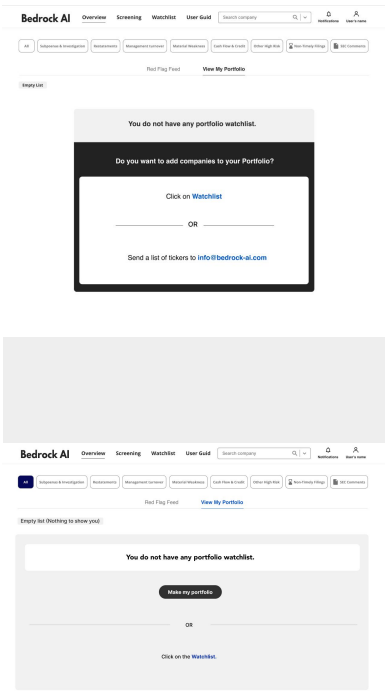


Design iteration



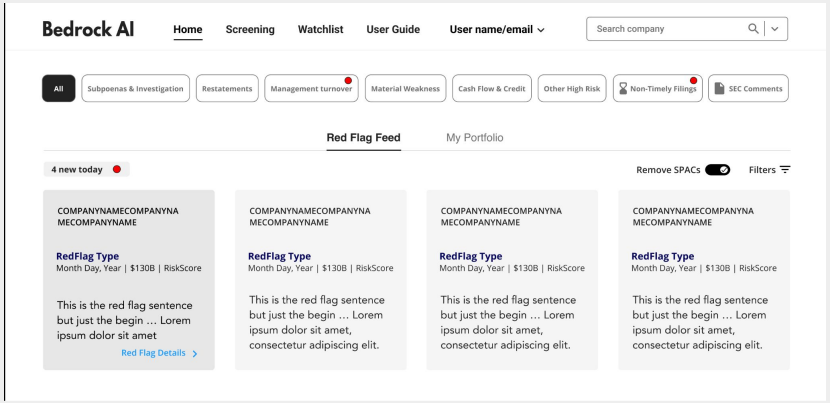






High-fid Prototype

[Link]



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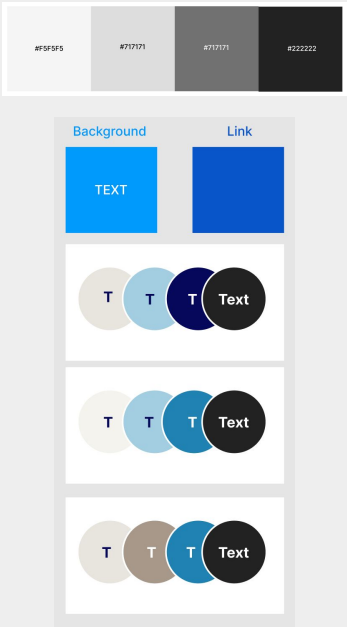
Style guide

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



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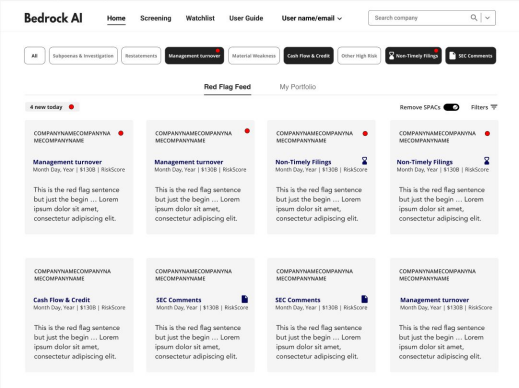
Accessibility audit (Now & Then)

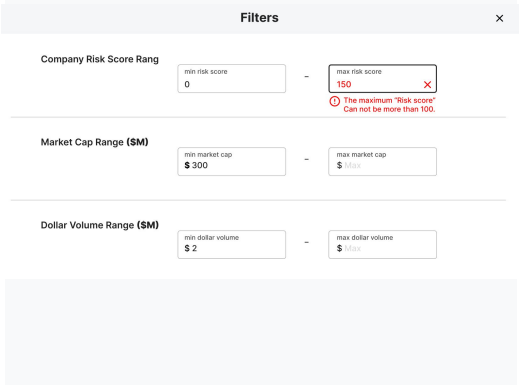
1

Applying Signs to Specify Recognition



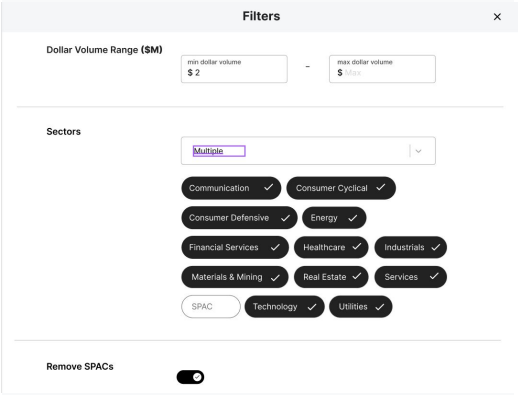
2

Error Messages



3

Chips-List



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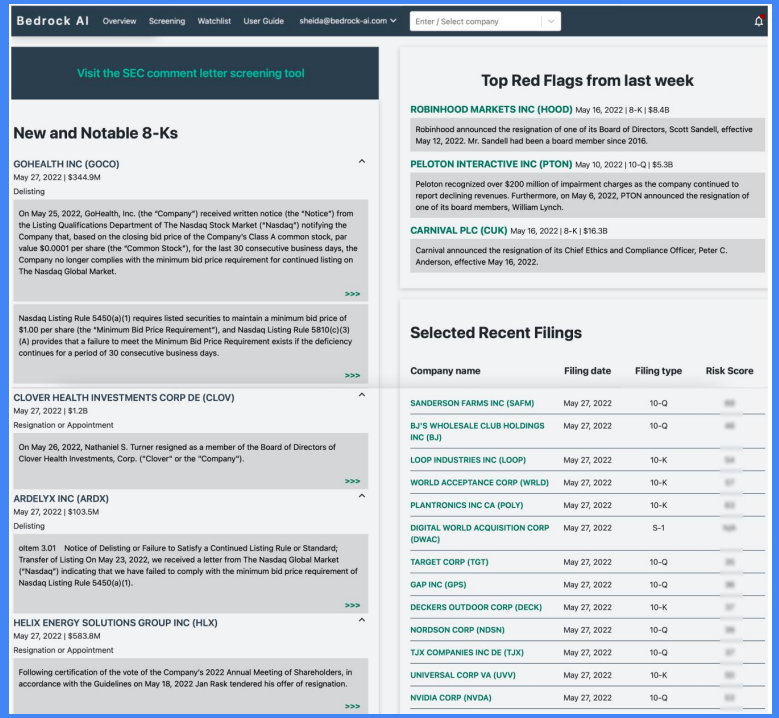
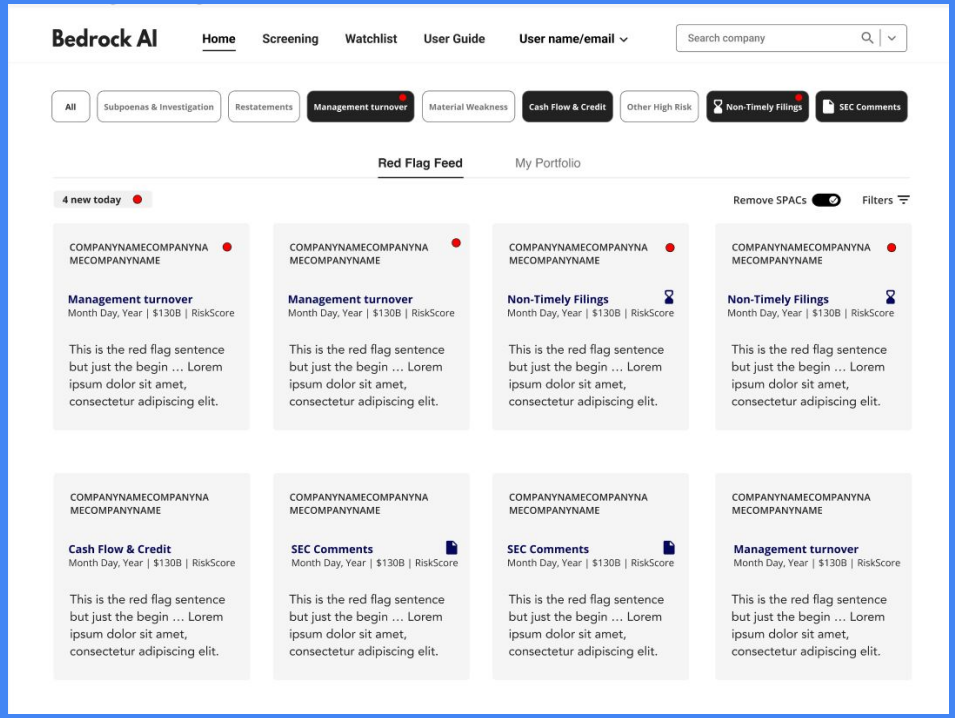
Before



After



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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.

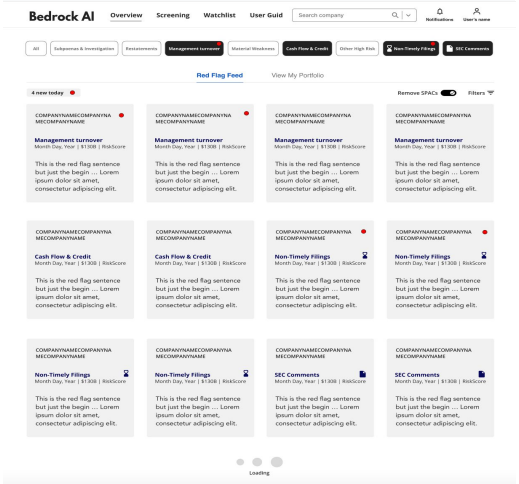
Auditing designs for accessibility for any product increases the usability.

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

Next Steps

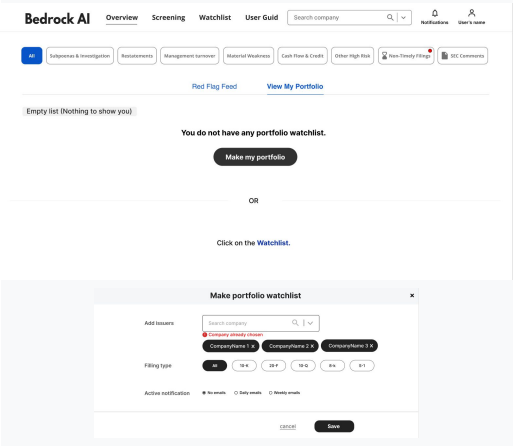
1

Specify NEW flags



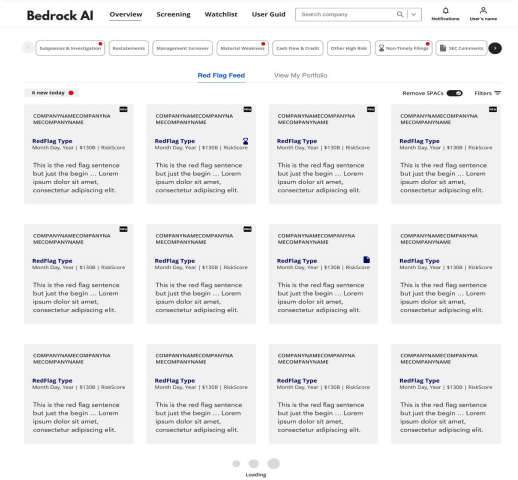
2

Shortcut to Modify Watchlist



3

Horizontal Scrollable Menu



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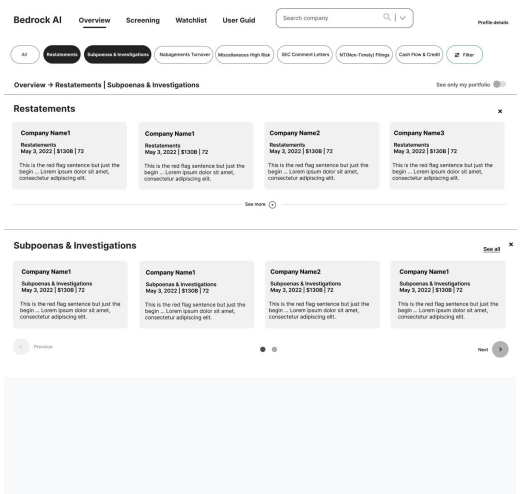
Next Steps

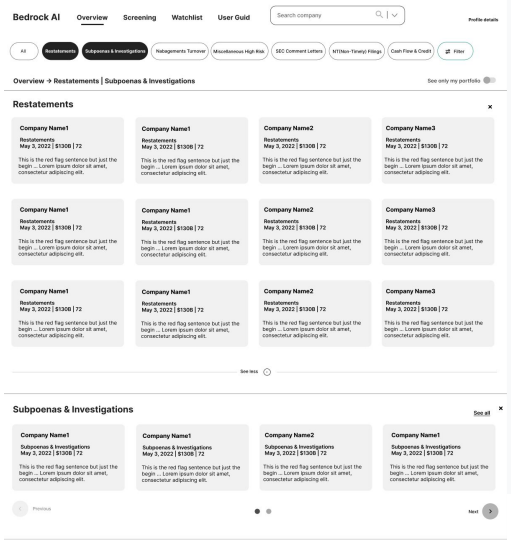
4

Bookmark



5

Sorted View



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Set Notifications

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