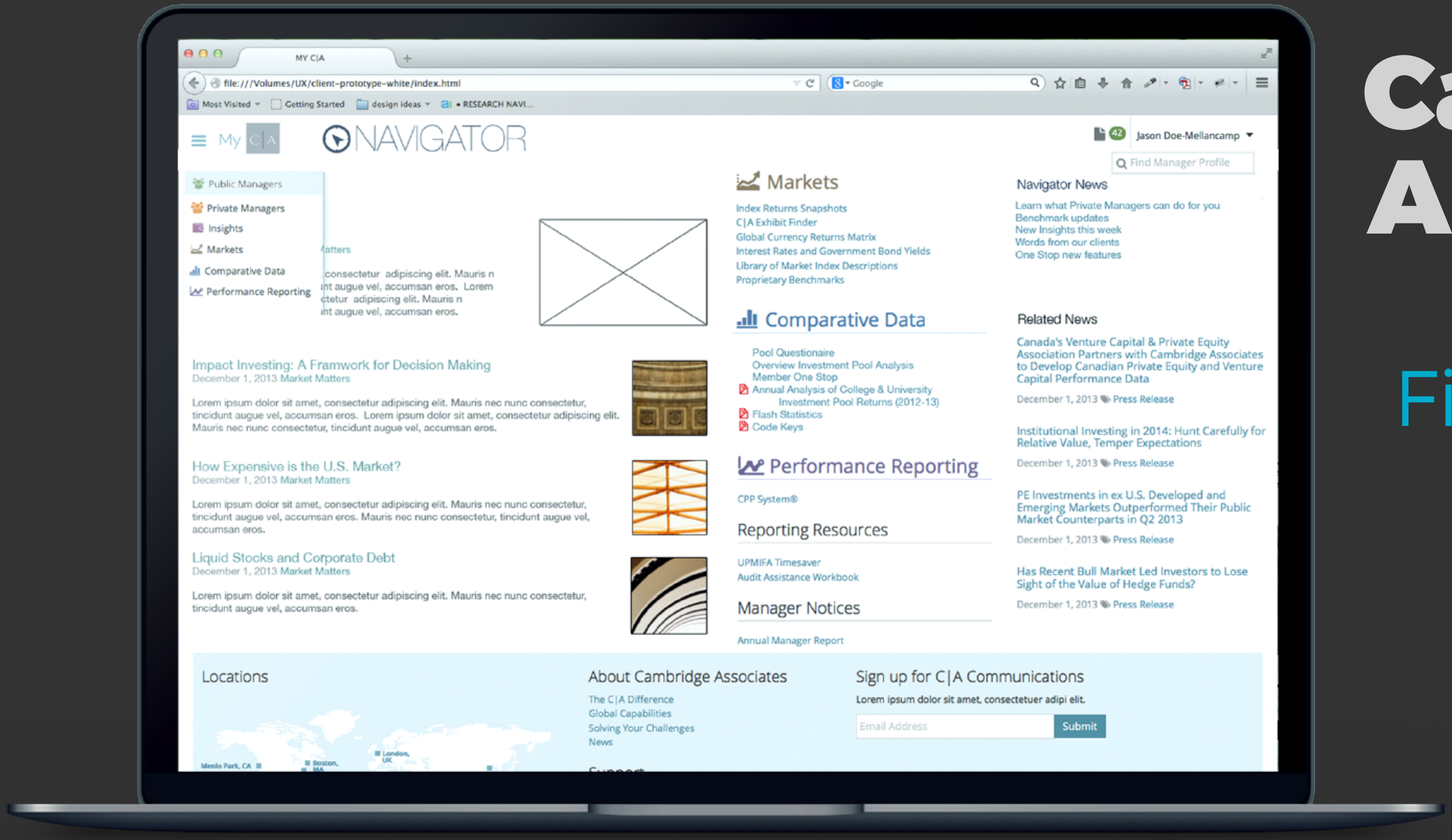


Cambridge Associates

FinTech Portal Re-Design 07/01/2014

Cambridge Associates

Financial Management Leaders

- CA provides financial managers resources, knowledge, and insights in managing various funds from public, private, and municipal.
- Data visualization and insights are a crucial feature that would greatly enhance management capabilities and efficiency
- Original roots and foundation from Cambridge University
- Reserved and modest environment and culture

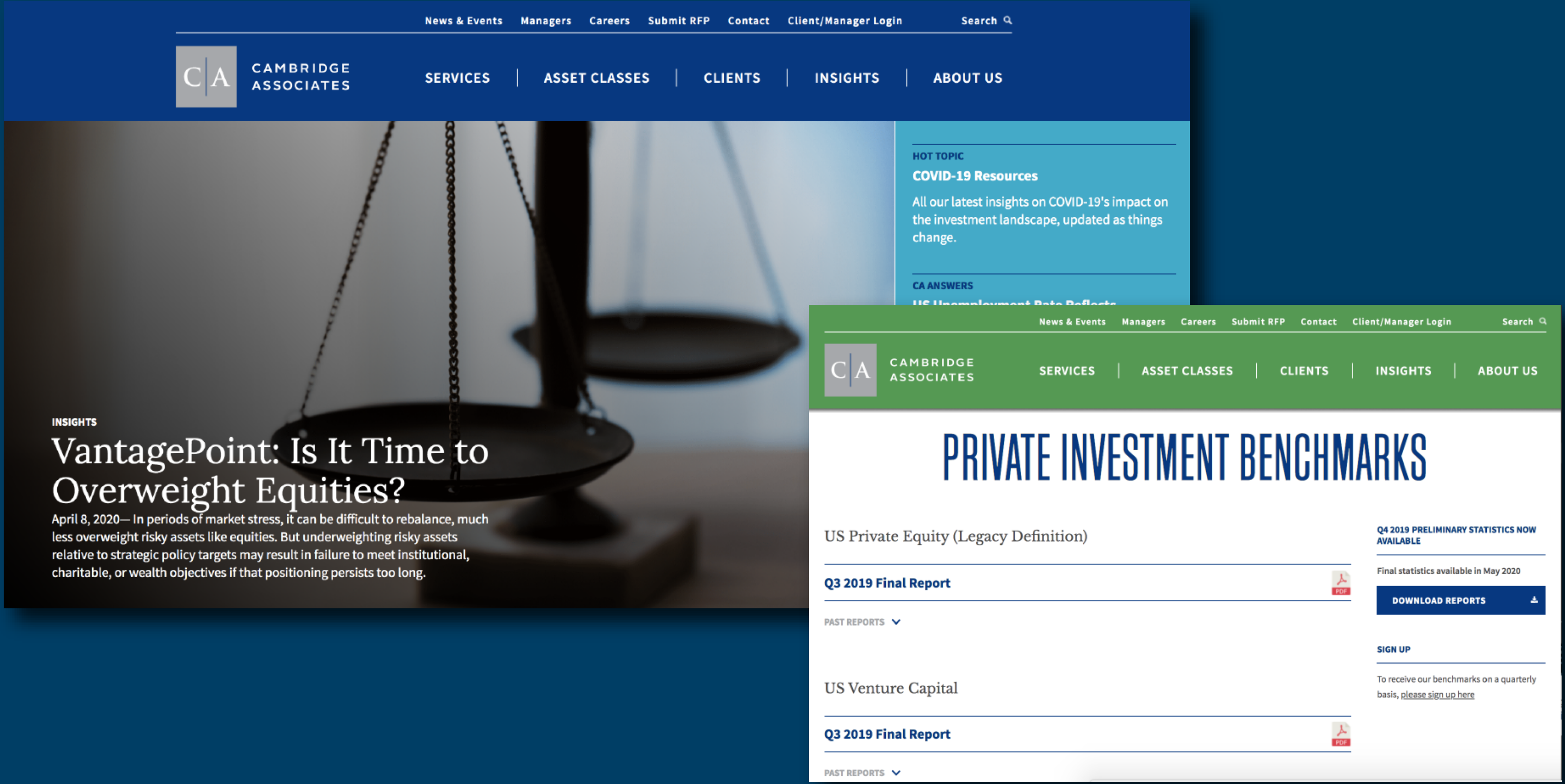
Financial Managers & Industry Standards

- Some Managers have been with the firm for over 30 years
- Very comfortable with excel and creating complex data structures & algorithms
- Financial Managers for larger structures and institutions are the clients
- Senior Financial Managers are near to impossible to interview or test
  Have to resort to asking VP insights in their perspective
- Product teams, Directors, Analysts and Associates.

Table of Contents

1. Product Overview

What iare our goals & marketplacement?


News & Events
Managers
Careers
Submit RFP
Contact
Client/Manager Login
Search
C|A
CAMBRIDGE ASSOCIATES
SERVICES
ASSET CLASSES
CLIENTS
INSIGHTS
ABOUT US
HOT TOPIC
COVID-19 Resources
All our latest insights on COVID-19's impact on the investment landscape, updated as things change.
CA ANSWERS
INSIGHTS
VantagePoint: Is It Time to Overweight Equities?
April 8, 2020— In periods of market stress, it can be difficult to rebalance, much less overweight risky assets like equities. But underweighting risky assets relative to strategic policy targets may result in failure to meet institutional, charitable, or wealth objectives if that positioning persists too long.
News & Events
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CLIENTS
INSIGHTS
ABOUT US
PRIVATE INVESTMENT BENCHMARKS
US Private Equity (Legacy Definition)
Q3 2019 Final Report
PDF
PAST REPORTS
US Venture Capital
Q3 2019 Final Report
PDF
PAST REPORTS
Q4 2019 PRELIMINARY STATISTICS NOW AVAILABLE
Final statistics available in May 2020
DOWNLOAD REPORTS
SIGN UP
To receive our benchmarks on a quarterly basis, please sign up here

Roles over 2+ Years

1. Sr. UX Designer

- Started in a three person team with a manager and single front-end developer.
- Worked closely with PMs to determine use-cases and feature conceptualization

2. Lead UX Researcher

- Team Expanded to a Manager, Lead Researcher, Two Designers and Three Front-End Devs
- Conduct design reviews, provide collaborative insights to usecases and contribute to design solutions,
- Capture consistencies and decisions to add to the patter Library
- Managed Research initative and pattern behavior analysis reporting
- Conducted regular user testing, provide insights and findinds.

3. UX Manager (Sapient Contracting)

- Bridge between consultant and internal users
- Worked closely with Sapient consulting team in proving user research and analysis to help make better design descisions.

2. Defining Primary Users

Who are we solving for?

Interviews | Personas

Interviews

"I am comfortable with excel, I do not see myself using these tools much."

Sr. Financial Manager

I am concerned about security. I am very private about my process and client information.

Financial Analyst

"Financial research can get complicated, I am excited to see how this new product creates a better solution."

Jr. Associate

"With hundreds of options, I would like a better way to compare my search results. It would be nice to customize my criteria, save and/or share my results."

Sr. Hedge Fund Manager

Personas

IAN ADAMS

ASSOCIATE (IA and RA)

LOCATION Boston, MA
(ENNEAGRAM) TIER The Achiever
MYERS BRIGGS ENFP
FAVORITE APP Twitter
ARCHETYPE The Diplomat

Level-headed Subtle Capable

"If I had a way to share projects and collaborate in real time, that would make my workload so much easier to manage."

BIO

Ian is establishing with himself with directors, at C|A and in the industry, so he hates anything that makes him look bad or unprepared. He is juggling multiple deadlines and coordinating many pieces of data from different internal groups to prepare client materials.

RESPONSIBILITIES

- Collaborate with team members on client materials: rec memos, manager search, complete template, ad hoc requests as well as data analysis in Excel or research DDs
- Meet multiple deadlines, coordinating interactions with all internal groups: PRG, MIG, ASG, CCD, CMG, etc.
- Interacting and identifying opportunities for clients
- Awareness of market environment
- Document management- organizing client materials
- Be responsive to email/instant communications

GOALS

- Deliver accurate materials
- Stay organized with multiple requests and deadlines
- Gain access to and search internet
- Remote access to client work and email, stay in touch when out of office and all times
- Use technology to increase efficiency and leverage existing materials

FRUSTRATIONS

- Inability to easily access materials that could be leveraged (info sharing in general) when faced with deadlines
- Inefficiency of using multiple C|A apps for one task: Excel models, CADA, One Stops, RN, EPA, AACS, MARS, etc. is a barrier to meeting tight deadlines
- Feeling that systems have not been optimized for them
- Network issues, slow downs and crashes that effect MS Office, CADA, and other C|A apps as every minute counts
- Responsiveness of internal requests for data
- Difficult access to email/instant messaging out of office

TECHNOLOGY

Internet
Google, C|A Home, news

Software
MS Office, C|A apps, One-Stop, RN

Mobile Apps
Email, Google Maps, C|A Mobile Apps, news

Social Networks
LinkedIn, Facebook, Twitter, news, etc.

TIME ALLOCATION

CLIENT DELIVERABLES
Edits MS Office materials and collateral

EMAIL
All times of the day and devices

COLLABORATING
Review and edit presentation materials and collateral with remote colleagues, other work with clients

READING/LISTENING
Read/listen to research, industry, business and investment news

MEETINGS (Client/Manager)
Meetings in or out of a client/manager office

SOCIAL NETWORKS
Knows well, often connects with colleagues, industry leaders, news

Collaborative Effort : Provided Research

Personas

DIANE DAY

DIRECTOR (In Office)

"If I had a way to share projects and collaborate in real time, that would make my workload so much easier to manage."

BIO

Diane is establishing with her clients, at C|A and in the industry, so she hates anything that makes her look bad or unprepared. She has a vast majority of her clients based outside of local city, so travels often to meet with them. Typically she attends several manager meetings a month in her home office and occasionally she travels for manager meetings.

RESPONSIBILITIES

- Access research and news (both internal and externally generated)
- Collaborate with team
- Prepare client deliverables/advice
- Present materials
- Share insights and decisions made during meetings with team
- Be responsive to email/instant communications

GOALS

- Keep clients happy; deliver on investment goals
- Put only accurate infomation in front of clients
- Gain access to and search internet
- Call clients/team/managers
- Retrieve and work locally on MS Office files
- Access research and meeting materials from all devices
- Access email on all devices
- Get quick access to internal content before/during meetings
- Stay up-to-date with research and meeting audio/collateral

FRUSTRATIONS

- Sometimes up to 20+ different client relationships
- Lots of time away from their desk, resulting in hundreds of unread emails and tasks that fall between the cracks
- There isn't a good way to check in on the status of a client or their performance in a market event
- Post-2008 clients have weekly (vs. quarterly) requests for information and monitoring- additional strain
- Disparate, unreliable systems and high turnover in the IA group inherently leads to a high level of errors, requiring a significant level of oversight by ID
- Every ID has put materials in front of a client that has a significant error in it- direct correlation between the number of supporting materials (size of the book) and the size of an error that got put in front of a client earlier in their career

5%	10%	5%	5%	75%

Internet/Intranet
Google, C|A Home, news, C|A apps: One Stop, RN, etc.

Software
MS Office

Mobile Apps
Email, news, C|A Mobile Apps

TIME ALLOCATION (In Office)

EMAIL
All times of the day and devices

COLLABORATING
Review and edit presentation materials and collateral with remote colleagues, other work with clients

CLIENT DELIVERABLES
Edits MS Office materials and collateral on her C|A laptop from plane/hotel

RESEARCH
Read and listening to research, industry, business and investment news, podcasts

MEETINGS (Client/Manager)
Meetings in or out of a client/manager office

Collaborative Effort : Provided Research

3. What are our challenges?

What our insight conclude?

Workshops | Card Sorting | IA

A lot of the content is out dated.

Very outdated

Where do we start to start comparisons

I want to save, share and export my findings

Not Responsive

I dont see how this is one product

I dont trust my insights will be kept private

Insights

As a Financial Advisor, it would be nice to be able to:

... Trust my online and cloud environment with highly confidential information about not only our clients, but internal knowledge, findings and insights.

... Clearly differentiate between the different tools and services

... Manage accounts and insights clearly without having to dig for information

... Keep all my resources in one place instead of switching between multiple screens

... Export findings and data to excel spreadsheets

... Have access to multiple data set, imports, and legacy knowledge

Opportunities

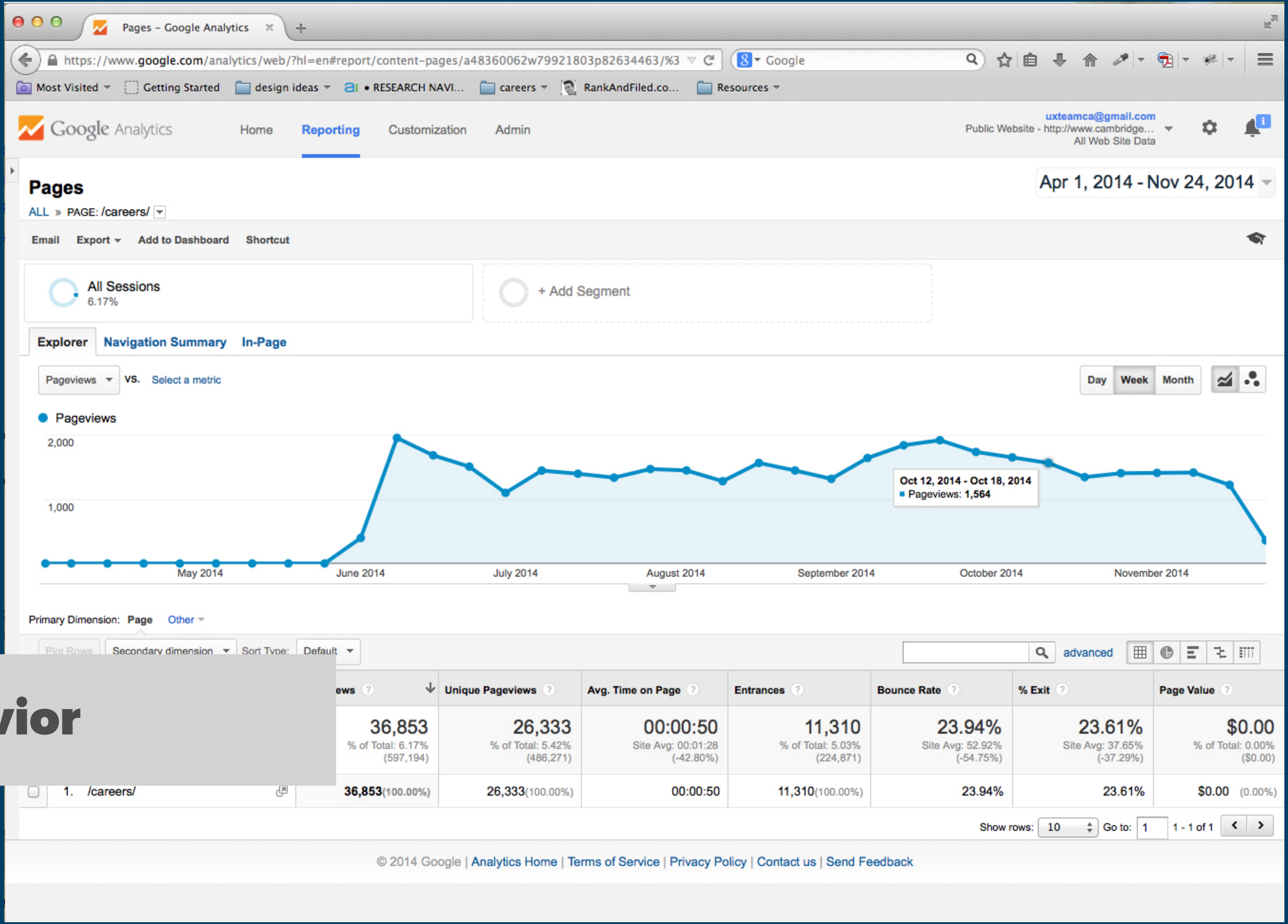
Technology:
Digital experiences and portals are getting more advanced everyday. The longer C|A goes without updating systems the more backtracking, time, and resources will be required. Sure, it’s not broken,.... yet.

Experience:
Now is the time to merge the different products into one experience. Creating a single source for FA to conduct business, find resources, connect data sets, and manage their own experiences, the better they will be at their job, and focus on clients.

Content Strategy
All four systems have old, un-used concent. Opportunity to do a Content Audit as well as create a new content strategy geared towards information and calls to action.

4. External Website

External Website: Careers



Observe User Behavior

Affinity Mapping

Corporate Careers Webpage - C|A Recruiting and Hiring

Creating a more user friendly careers page to attract and engage potential talent.

Problem	Marketecture	Key Notes	Solutions
A. C|A General			
• How do I learn more about C|A in general if I do not come from a financial background? • How do I learn more about C|A's role and services in the larger financial industry and big picture? • How do I learn about C|A corporate structure? • How do I learn more about C|A's corporate culture? • How do I learn about WHO C|A is instead of WHAT do they do? • How do I learn more about C|A employees, staff or potential colleagues? • How can I see bio's or profiles of current employees to compare my skill set or if my experience meets expectations or compare my level of expertise? • How do I learn more about the different roles and how they all work together? • How do I learn about career building and where my role would fit in to the big picture of the company?	Meet (		
B. C|A Contact			

• Where do I go if I have questions about a job posting or general questions about C|A?
• How do I contact someone in HR directly instead of the form?
  • Not sure where the message will end up.
  • Not sure they will hear back from anyone.
  • Not sure they are being considered for
	Ask C|		

Affinity Mapping

Corporate Careers Webpage - C|A Recruiting and Hiring

Creating a more user friendly careers page to attract and engage potential talent.

<u>JOB SEARCH</u> • How do I know if my personality will fit in with the C|A environment? • How do I get to the Careers section and page? • Why are there two different lists, they look the same • How to I get to a the list of jobs from <u>Opportunities at C|A</u>	Join C|A	• Looking for a general careers page and introduction to C|A – warmer / personal interaction • Always goes to top menu first • Go to bottom footer second • Want to click on the CAREERS text in footer (not a link, only header) • Do not usually click on "opportunities at C|A" - When they do, they do not realize the headers are links - Go to the right navigation to Experienced Professional or Student - No on really goes to Life at C|A • Cannot always tell the link text to apply for a job is a link • User goes back to the right navigation • Look for an "Search here" link Not easy to recognize that the sentence "explore our opportunities to see if any are…." Is a link	1. Separate Careers page 2. Warmer / more engaging / relatable - Pictures / Bios / profiles - day to day / relatable 3. Remove Careers text in footer 4. Add link to top and bottom banners 5. Combine experienced professionals and recent grads 6. List openings on main careers page 7. Remove text sentence link, "explore our opportunities to see if any are…." 8. Quotes and Case studies for different titles to show career progression
<u>APPLYING</u> • How do save my profile if I want to come back to make changes? • How will I know if I am being considered for a position? • What do I do if I want to update my resume or cover letter? • What will my career progression and future at C|A be?	Join C|A	• Job descriptions are too general • No need for two different lists • Reminder of where users can login to check profile • Blurb about what to expect after application is submitted	1. Create user profile 2. Ability to see which attachments you have uploaded 3. Ability to change and update profile • See status for jobs applied to • See direct HR recruiter

Affinity Mapping

Balsamiq Wireframes

NEWS CONTACT MANAGERS LOGIN SEARCH

CAMBRIDGE C|A ASSOCIATES

THE C|A DIFFERENCE | OUR GLOBAL CAPABILITIES | SOLVING YOUR CHALLENGES | OUR INSIGHTS

Global Investment Services

Global Investment Services (GIS) strives to help clients meet or exceed their investment objectives. Team members provides clients with a combination of independent global manager and capital markets research, expertise in alternative investments, and a focus on customized solutions.

Malcolm, 11 months at C|A

I joined CA in January 2014 with completely open expectations. What I have truly appreciated about my experience so far is the breadth of learning and professional development opportunities. Within my first year I have worked with a range of clients on the Global Investment Services side, and participated in both investment due diligence and business development projects in my spare time. I highly recommend this position for anyone interested in investing and looking for a very diverse experience.

The GIS

such as developing appropriate financial and investment goals, asset allocation policies, and . Roles in GIS allow for immediate exposure to a wide range of investments across all asset classes.

support by assisting with portfolio als typically interact directly with the Boards of Trustees, Investment Committees, family members or principals in a family office, and/or Chief Investment Officers of institutions.

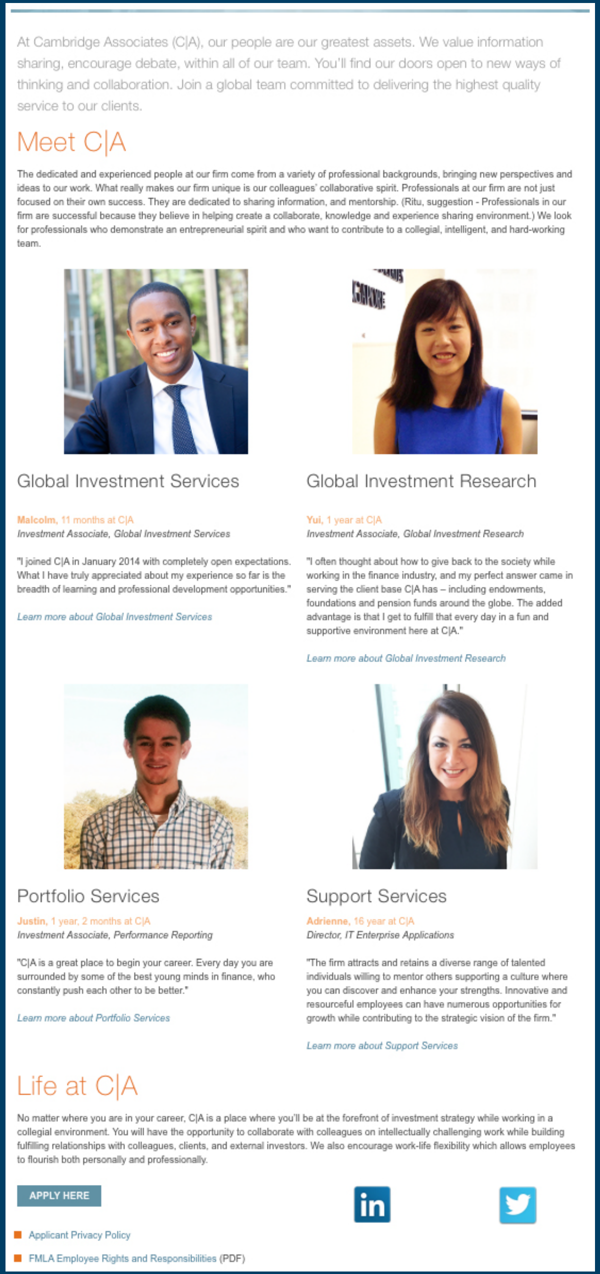
Experienced Career Profile

Investment Directors' work is intellectually stimulating and dynamic; they work to optimize portfolios' asset allocations, select managers in all asset classes, and ensure clients' portfolios are positioned to take advantage of continuous economic developments worldwide.

APPLY HERE

BACK TO CAREERS

Published Website



At Cambridge Associates (C|A), our people are our greatest assets. We value information sharing, encourage debate, within all of our team. You'll find our doors open to new ways of thinking and collaboration. Join a global team committed to delivering the highest quality service to our clients.

Meet C|A

The dedicated and experienced people at our firm come from a variety of professional backgrounds, bringing new perspectives and ideas to our work. What really makes our firm unique is our colleagues' collaborative spirit. Professionals at our firm are not just focused on their own success. They are dedicated to sharing information, and mentorship. (Ritu, suggestion - Professionals in our firm are successful because they believe in helping create a collaborate, knowledge and experience sharing environment.) We look for professionals who demonstrate an entrepreneurial spirit and who want to contribute to a collegial, intelligent, and hard-working team.

Global Investment Services

Malcolm, 11 months at C|A
Investment Associate, Global Investment Services

"I joined C|A in January 2014 with completely open expectations. What I have truly appreciated about my experience so far is the breadth of learning and professional development opportunities."

Learn more about Global Investment Services

Global Investment Research

Yui, 1 year at C|A
Investment Associate, Global Investment Research

"I often thought about how to give back to the society while working in the finance industry, and my perfect answer came in serving the client base C|A has – including endowments, foundations and pension funds around the globe. The added advantage is that I get to fulfill that every day in a fun and supportive environment here at C|A."

Learn more about Global Investment Research

Portfolio Services

Justin, 1 year, 2 months at C|A
Investment Associate, Performance Reporting

"C|A is a great place to begin your career. Every day you are surrounded by some of the best young minds in finance, who constantly push each other to be better."

Learn more about Portfolio Services

Support Services

Adrienne, 16 year at C|A
Director, IT Enterprise Applications

"The firm attracts and retains a diverse range of talented individuals willing to mentor others supporting a culture where you can discover and enhance your strengths. Innovative and resourceful employees can have numerous opportunities for growth while contributing to the strategic vision of the firm."

Learn more about Support Services

Life at C|A

No matter where you are in your career, C|A is a place where you'll be at the forefront of investment strategy while working in a collegial environment. You will have the opportunity to collaborate with colleagues on intellectually challenging work while building fulfilling relationships with colleagues, clients, and external investors. We also encourage work-life flexibility which allows employees to flourish both personally and professionally.

APPLY HERE

- Applicant Privacy Policy
- FMLA Employee Rights and Responsibilities (PDF)

5. Data Visualization & Analytics

KPI Metrix & Informed Design

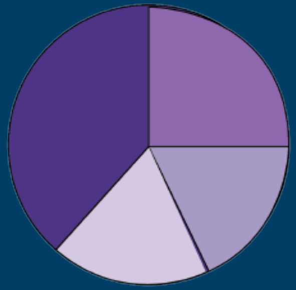
Google Analytics

Business Case 2016

CAMBRIDGE C|A ASSOCIATES

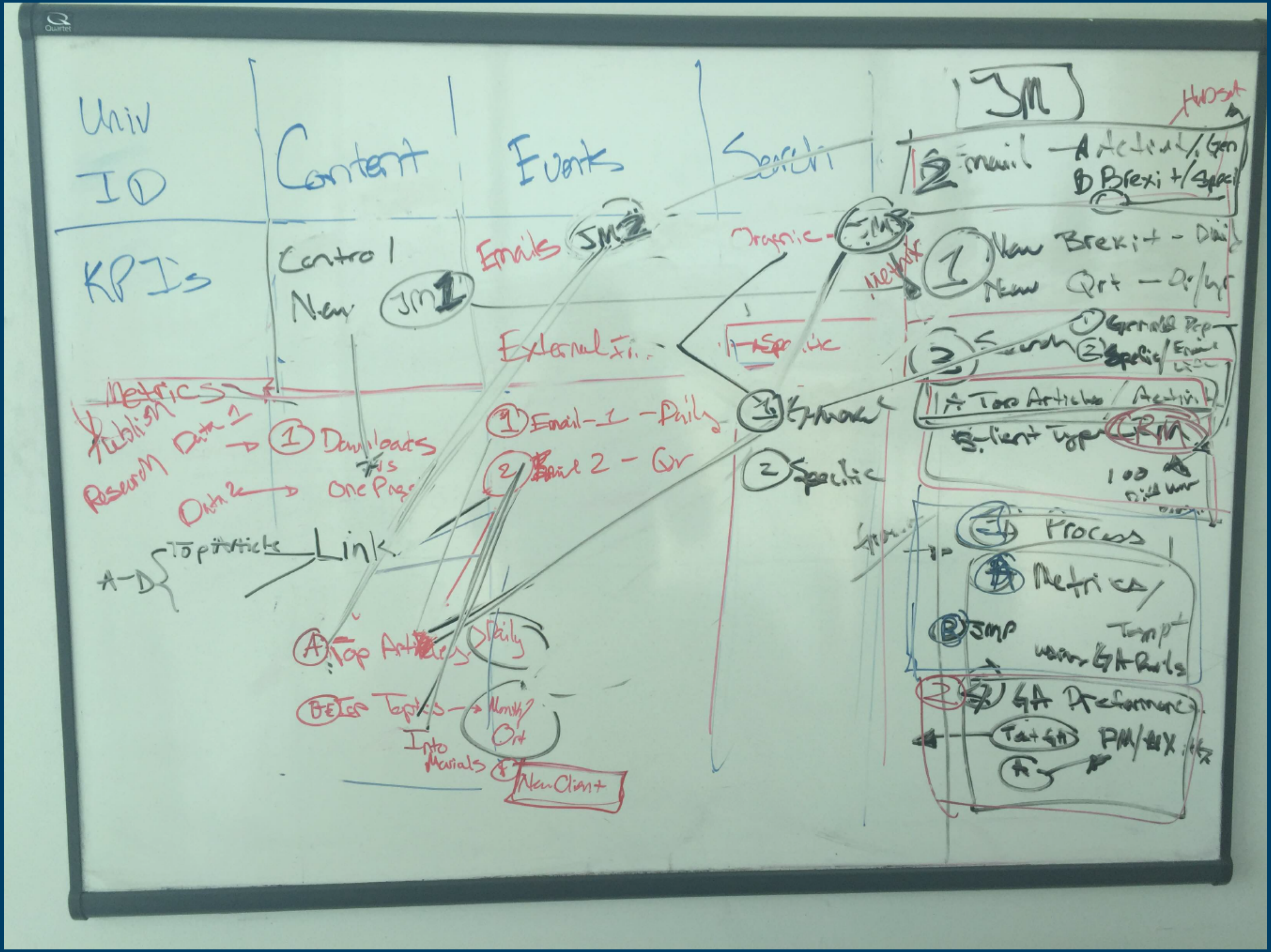
https://www.ritumaghera.com/CAdata.pdf

DATA VISUALIZATION 101



Analytics Strategies

https://www.ritumaghera.com/CAanalytics.pdf



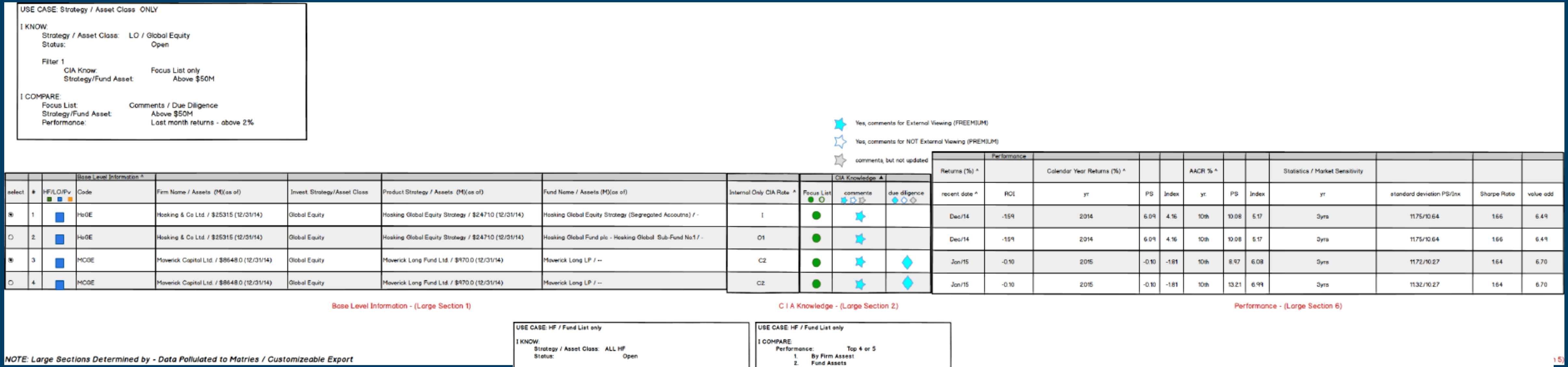
KPI Discovery

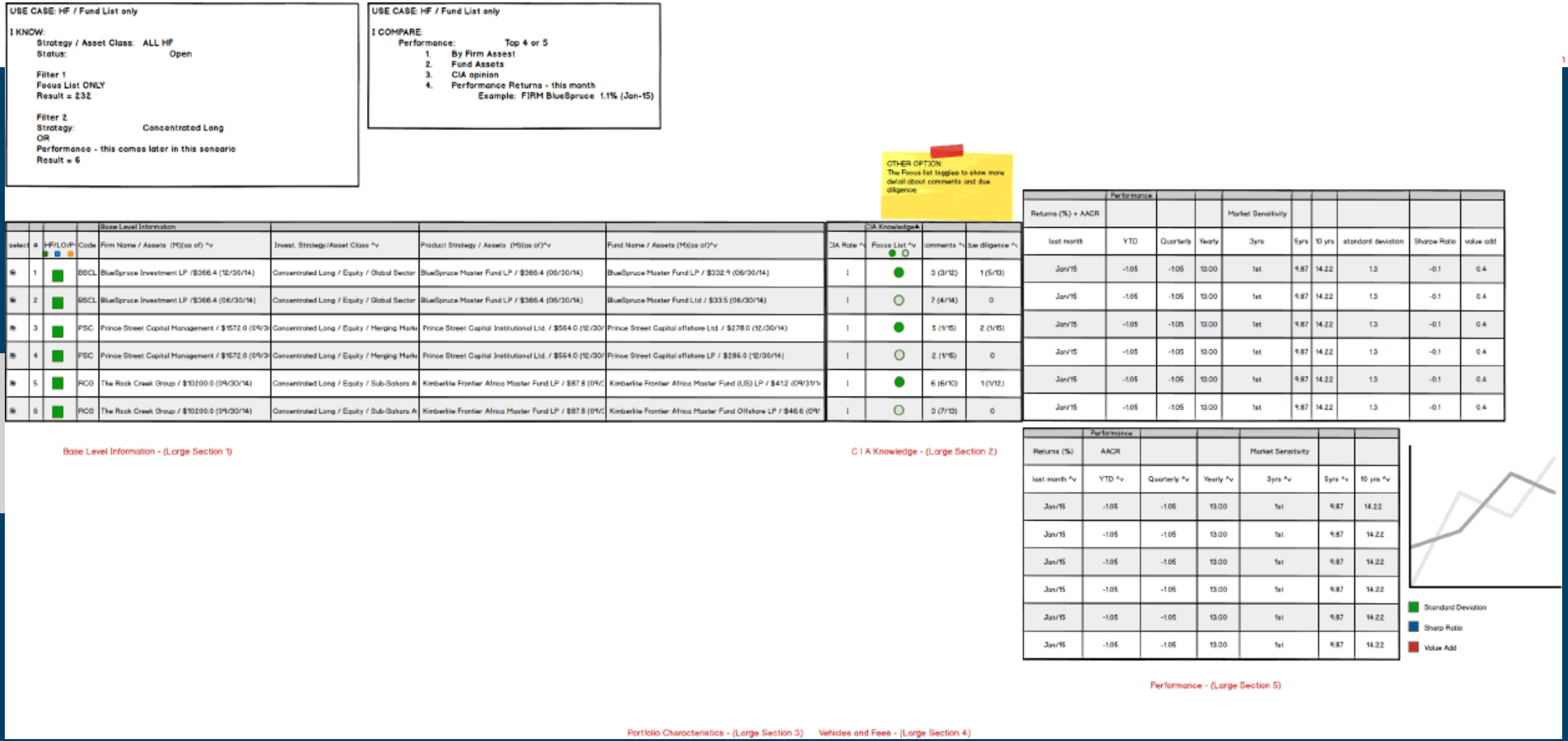
KPI Metrics - Steps 1 & 2

WHAT							HOW	WHO	
Objectives	**New Business**		**Customer Loyalty**				**Data Collection**	**Data Categories & IDs**	**Current Clients**
KPIs	New vs Old Visitor Activity	Visitors	Sessions	Content	Time	Device			
Univeral KPIs	Subscriptions Entry Points Organc or Referred	New compare to current Frequent vs Occa Users - role - events Demographics Profiles/User Group	Ave. duration Organic Referral Lifetime value Pattern Recognition User Paths	*Product Specific *C|A Research *Performance *Insights *Managers Fees Changes	Quarterly Reports Benchmarks		**Traffic Channels**	Direct vs Referral Search Device actions	**CA client home Desktop & mobile Emails vs Organic**
Targeted (Product Specific) KPIs	Optica Interactivity User Logins Hubspot / Email C|A External to Link to Optica	User Logins	Primary entry Client home Bookmark Ave. duration Organic / Referal Lifetime value	Email Page links Blogs Product updates External News	Report Sequence D/W/M/Qt, yr Benchmarks Internal alerts External Factors	60% Desk 40% Mobile	**Client Grouping**	client types contract type peer groups	**Colleges & Univ**
Segment 1 Client Type		Advisory OCIO CIO CFO					**Data Segmentation**	Group Roles Postition Related to: Manager data Fund data Benchmarks	**Direct legacy client** **CFO**
Segment 2 Contract Role		Executive or Analyst							**Products Optica, RN, BMC**
Scheduled Events 1		Email subscribers Client home External influence (Brexit)	Realted to new - content - annoucemnts - updates	Insights Publications Release Blog Posts (reg users)	Common time Un-common activity Related to time of day		**Monitor planned Activity.** **Answer Specific insights**	Content site activity Events Timelines milestones industry activity	Client Ave compare to itself. Time: Frequent or occ Content: What pages How: Direct, email CA Client - What's different - New activity - New business potential
Scheduled App Update				Product Updates	Release Date	Mobile Soft ware Updates			

KPI Metrics

6. Product Re-Design
Research Navigator

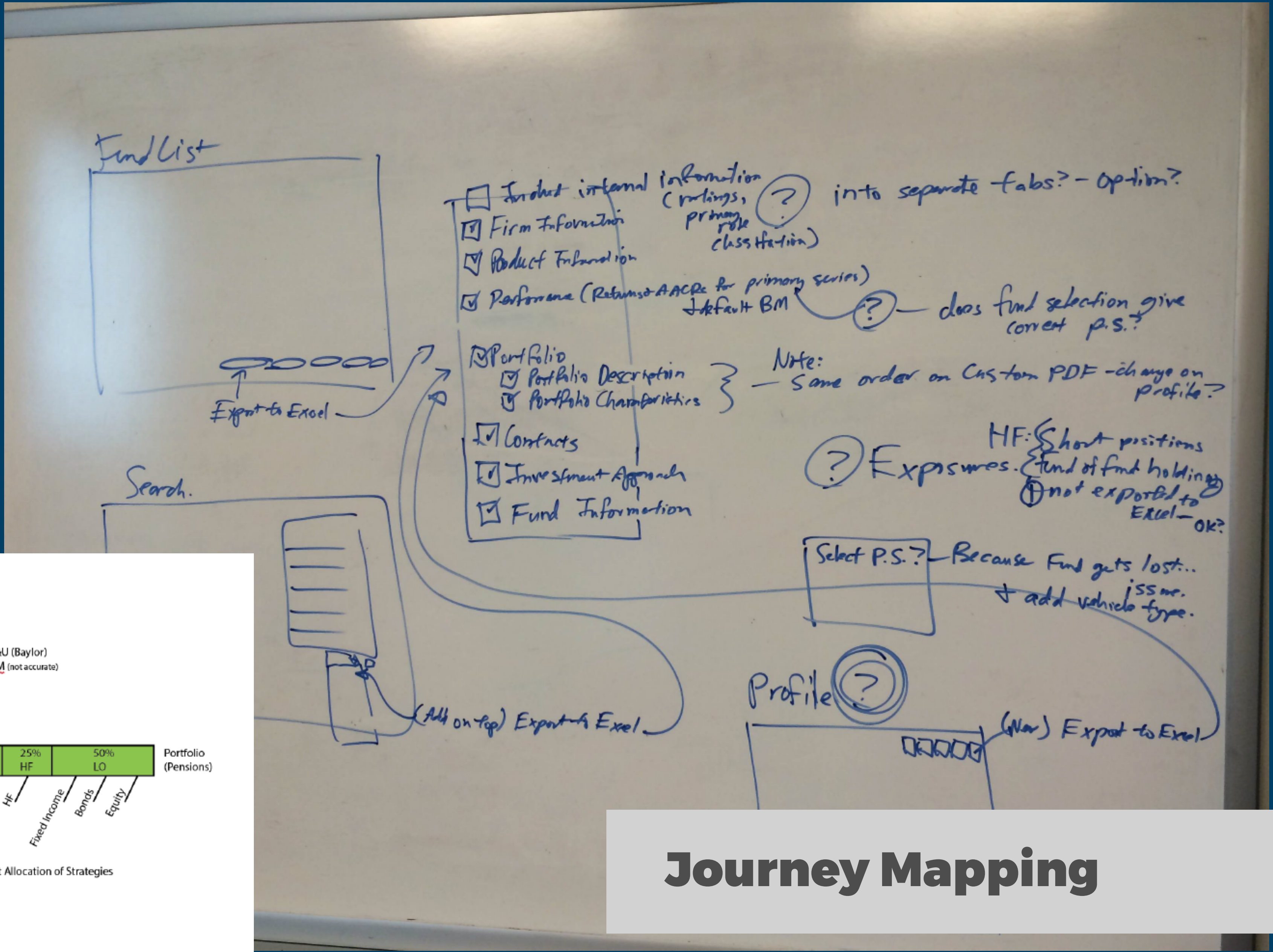


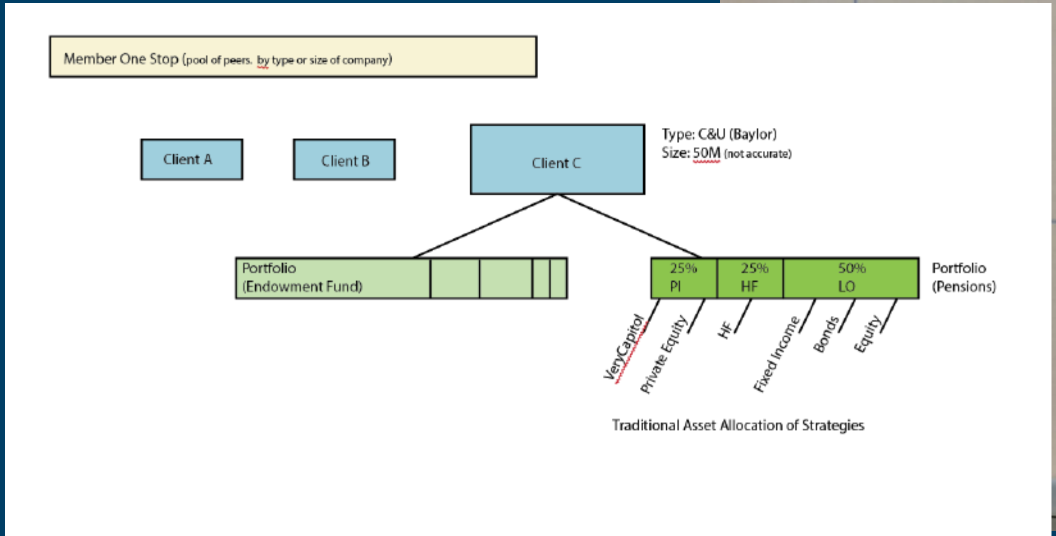


Gathering Use Cases

	A	B	C	D	E	F
1	Competitors' Social Media Landscape					
2	Company	ION Relation	CIA relation / persona	HQ	Global	Website / Reference
3	ION Chart					
4	Aksia	Research Navigator	Independent hedge fund research and advisory firm	NY	Yes	http://www.aksia.com/index.htm
5	Albourne (Albourne Village - Social)	Research Navigator		London	Yes	https://www.albourne.com/albourne/home
6	Mercer	Research Navigator		WDC	Yes	http://www.mercer.com
7						
8	AltX	Portfolio Analystics		CA	?	http://www.getaltx.com
9	Caissa	Portfolio Analystics		NYC	Yes	http://caissallc.com/?gclid=CPK7mvXqhsICFcdj7AodYHIAbA
10	Novus	Portfolio Analystics		NYC	Yes	http://www.novus.com
11	**RiskMetrics (MSCI)**	Portfolio Analystics				http://www.msci.com/products/riskmetrics.html
12	(BNY Mellon)					https://www.bnymellon.com
13	HedgeMark	Portfolio Analystics				https://www.hedgemark.com
14						
15	**MSCI - aquired InvestorForce**	Performance Reporting Client Data				http://www.msci.com
16	Private Client Resources	Performance Reporting				
17	Burgiss	Performance Reporting				
18	Addepar	Performance Reporting				
19	Investment Metrics (PARis)	Performance Reporting				
20						
21	Backstop (Data Management)	Manager Data				
22	eVestment	Manager Data				
23	Morningstar	Manager Data				
24	Preqin	Manager Data Benchmark Calculator				
		Manager Data				
		Manager Data				
		Client Data				
	Wilshire	Client Data				
30						

Competitor Analysis

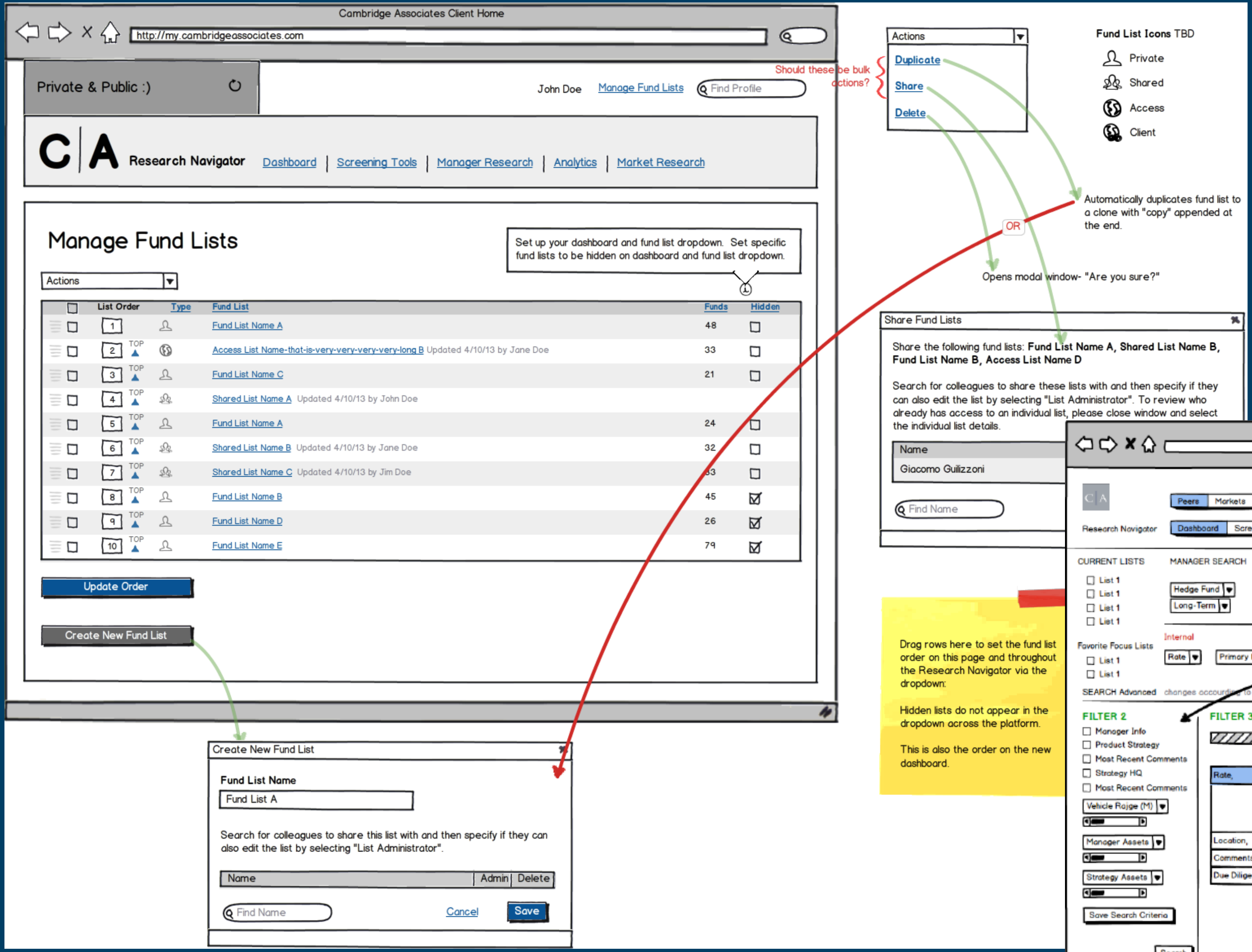


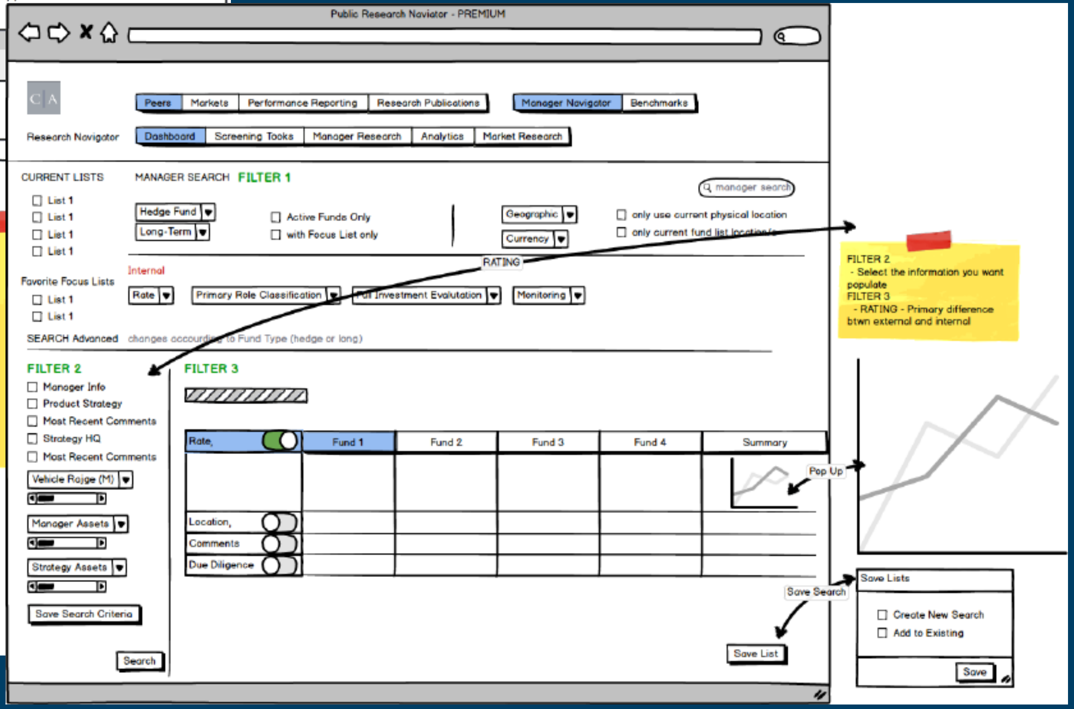


Traditional Asset Allocation of Strategies

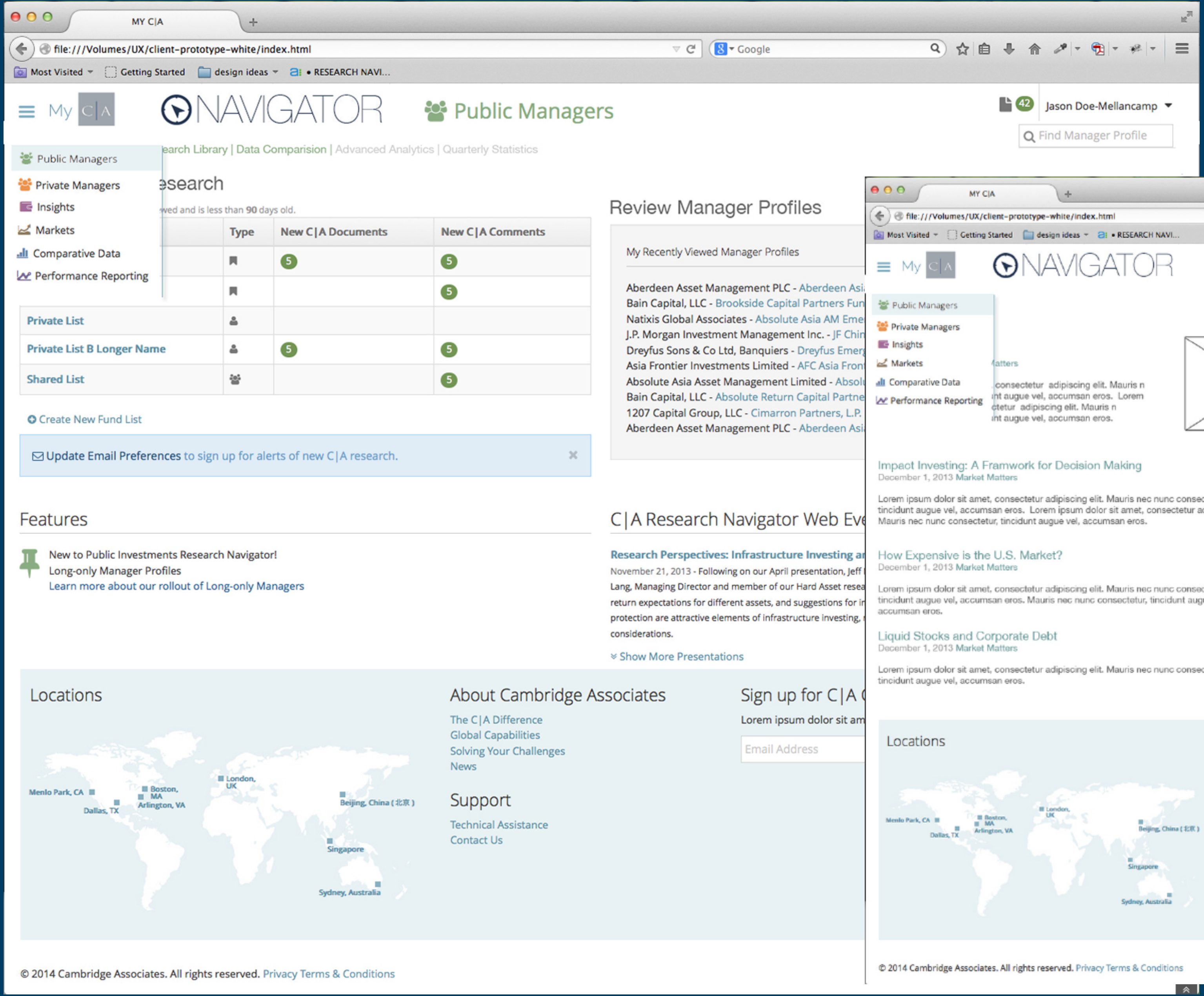
Journey Mapping

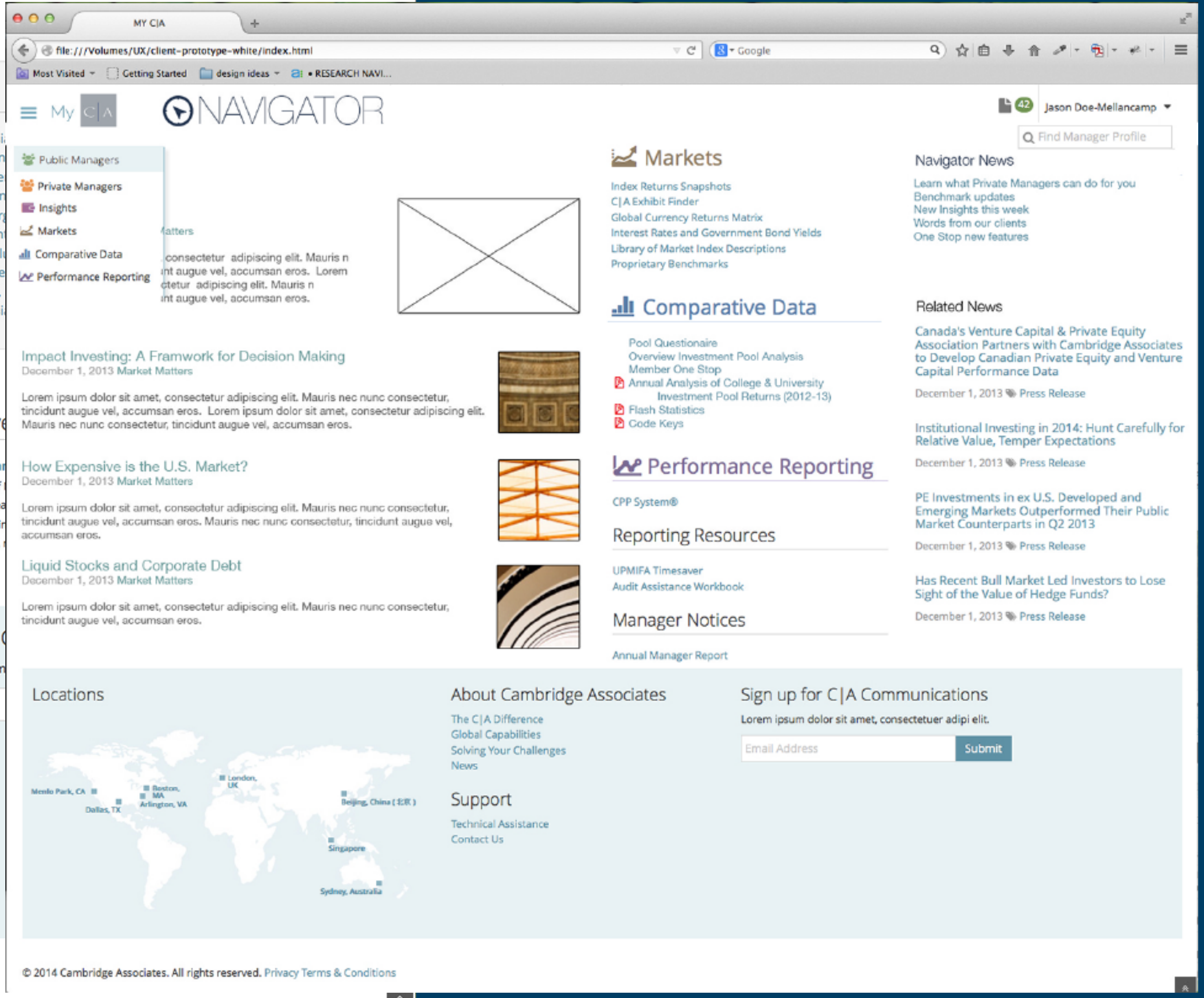
Balsamiq Wireframes



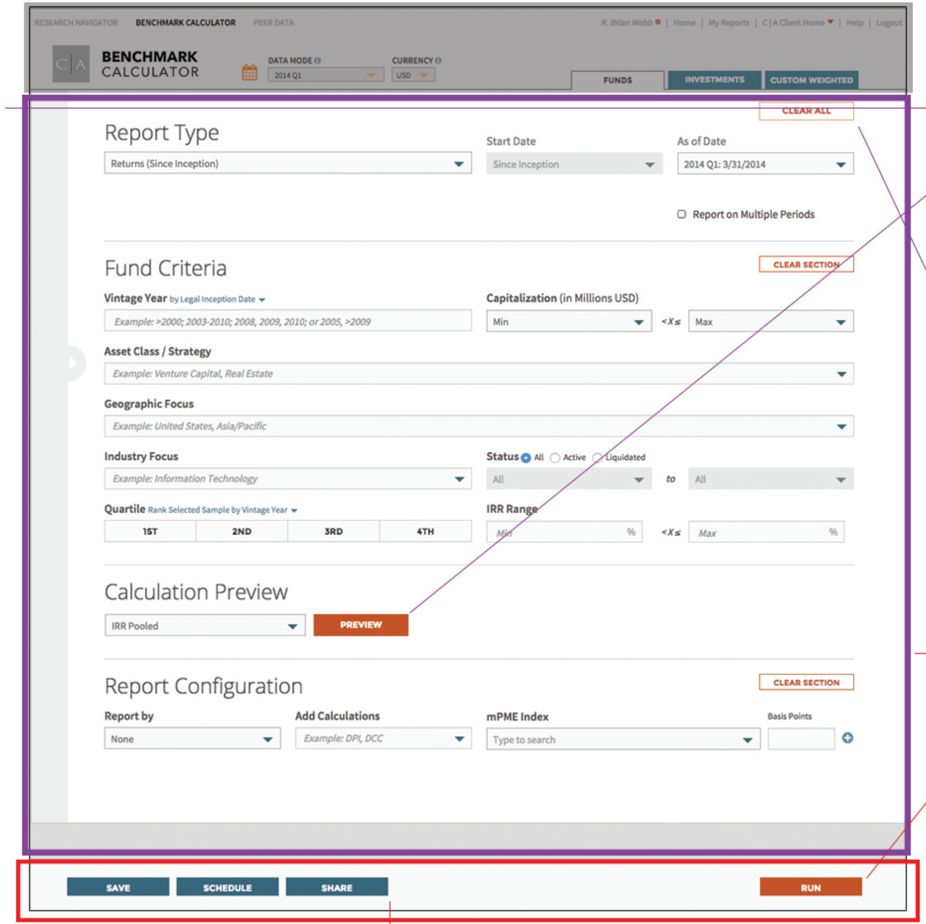


Mid-Fidelity





C | A Pattern Library: Buttons



CONTAINER BUTTONS

Primary Button

Universal Font Style: Mon
Universal Button Size:

Font Color: #ffffff

PREVIEW — static, bkcolor: #e5915d
PREVIEW — hover, bkcolor: #f6a868
PREVIEW — thinking, bkcolor: #xxxxxx
PRE — active, bkcolor: #c

Secondary Button

CLEAR ALL — static, bkcolor: #ffffff, border: 1px solid #e5914d
CLEAR ALL — hover / active, bkcolor: #ffffff, border: 1px solid #f9c77c

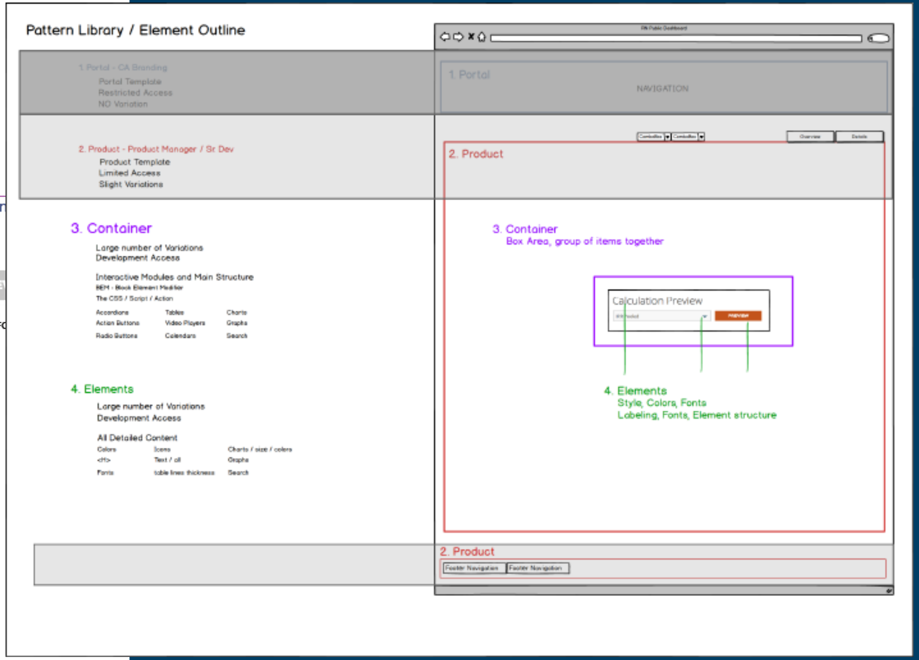
PRODUCT BUTTONS

Primary Button

RUN — static, bkcolor: #e5914d
RUN — hover / activ, bkcolo: #f6a868e

Secondary Button

SAVE SCHEDULE SHARE
static / hover / active
bkcolor: #90aec1



Component Library

7. Product Re-Design

Exhibit Finder

User Activity Analysis

Published Research - KPI metrics

General		6/1	7/11	7/12	7/13	7/14	7/15	7/	7/	7/18	7/19	7/20	7/21	7/22	7/23	7/24	7/25	BI WEEKLY
Capture Same TIME / DAILY (* new publication release)	MOST POPULAR			*			*			*								
# of visitors per day																		
Pageviews					59	66	58			107	87	53	69	52	0	8	64	738
Unique views					48	41	44			69	66	36	45	37	0	7	43	529
Ave Time					1:52	1:01	2:46			1:54	2:36	2:30	1:23	:30	0	1:12	1:14	1:44
Bounce Rage		25.53			13.33	25	20.51			21.88	32.26	33.33	16.28	27.03	0	42.86	17.95	22.47
Exit Rate		29.69			23.73	22.73	34.48			28.97	40.23	41.51	21.74	34.62	0	75	26.56	30.22
Top Navigation Activity		2.2			6.7	2	13			9.2	12	23	7.4	21	0	50	6.4	9.1
A. Recent Publications			19.7%	13.40%	24.90%	17.70%	13.10%			43%	30.7	19.2	31.6	2.9%	0	0	23.40%	
Is a Crisis Likely in the UK Commercial Property Sector?	A17																	
Has the GBP Bottomed? Not Likely	A16												5.6		/	/	2.1	0.8
Brexit Outlier or Harbinger?	A15											6.5	3.7		/	/	4.3	1.2
Will Europe and Italy Reach an Agreement on the Fate of Italian Banks?	A14										1.9	3.2	3.7		/	/		0.8
Review of Market Performance	A13									11	9.6	3.2	3.7	2.9	/	/	8.5	4.1
CA Perspectives: Spring/Summer 2016	A12									11	5.8		1.9		/	/	4.3	2.7
Spending Policy Practice	A11						7.9			7.9	1.9		1.9		/	/	2.1	2.3
How is the Structured Market Changing? 7/12	A10			/	16	7.9	/			/	5.8	3.2			/	/	2.1	3.3
Should Investors Reposition Portfolios in Light of the UK refe. Leaving the E. Union?	A9		2.9	3.2	6.7	2	2.6			1.3	/				/	/		1.9
Investment Office staffing, Oversight Costs and Govern: A Snapshot	A8		5.6	5.5	/	3.9	/			3.9	1.9		1.9		/	/		2.1
The 15% Frontier	A7		4.1	4.2	2.2	/	2.6			6.6	3.8		1.9		/	/		
Building a Portfolio Based on Shariah	A6		0.4	0.5		/	/			/	/							
Has the market Become too complacent too quickly?	A5		2.6			3.9	/			1.3	/							
Scandal, Recession, and Impeachment, Yet Brazilian Stocks are flying	A4		1.9			/	/			/	/							
US REIT Building the Case	A3																	
Real AssetDynamics: June 2016	A2																	
Hedgefund-ing the Pension Deficit	A1																	
	Previous		2.2								19	3.2	7.4					3.1
B. Monthly Publications			15.80%		26.3	29.60%	34.60%			11.9%	4.2%	6.50%	14.9%	2.9%			6.30%	
Asset Class Views & Summary July 2016	B4				/	/	/			/	/							
Read a short intro....	b4a					2	/			/	/			2.9			2.1	0.6
View Individ	B3	4.4	7.9		13	7.8	11			5.3	3.6	6.5	5.6				2.1	5.6
Market Matter: June 2016	B2		7.9		8.9	12	21			5.3	2.4		9.3					8.0
Invest. Pub. Highlights June 2016	B1				4.4	7.8	2.6			1.3	1.2						2.1	0.2
C. Quarterly Publications	C6		15.80%		6.6%	13.7%	2.6%			11.8%	7.2%	6.5%	7.4%				14.90%	
Vantage Point: Third Quarter 2016	C6		7.9		2.2	9.8	2.6			2.6	3.6		3.7				6.4	4.7
Endowments Q, First Q 2016	C5		7.9		2.2	3.9	/			/	2.4	6.5					2.1	2.7
US PE/VC BMC: Fourth Q 2015	C4 - bmc		/		/	/	/			/	/							
Global - US PE/VC BMC: Third Q 2015	C3 - bmc				/	/	/			7.9	1.2							1.6
Hedge Fund Updates: First Q 2016	C2				/	/	/			/	/		1.9					
Quarterly Reg Updates - Second Q 2016	C1				/	/	/			/	/						4.3	
	Previous				2.2	/	/			1.3	/		1.9				2.1	0.8
D. Topics		11%	5.80%		17.60%	13.70%	7.80%			6.50%	12%	16.20%	15.10%	26.50%			14.80%	0.8
Currency	d22	2.2			2.2	/	/			/	/		1.9					0.4
Equity	d21	2.2			2.2	3.9	2.6			1.3	/		1.9				2.1	1.6
Fixed Income	d20				2.2	3.9	2.6			/	1.2			2.9				1.2
Hedge Fund	d19				/	2	/			/	1.2		1.9	5.9			6.4	1.6
Introducing Materials	d18				2.2	/	/			1.3	1.2		1.9				2.1	1.0

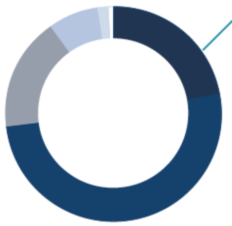
UX Data Anlysis: Exhibit Finder / Net Insights

Results

Exhibit Finder Views - 2015

Out of the total 777 exhibits

22% of all exhibits not viewed even once in 2015

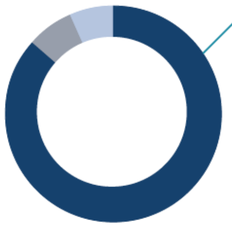


- 22% not once
- 51% only once
- 17% less than 7 times
- 7.5% more than 20 times
- 1.5% more than 50 times
- .75% more than 100 times

Exhibit Finder Views - 2013 & 2014

Out of the total 777 exhibits

86.5% of exhibits not viewed in 2015 were viewed in either 2013 or 2014

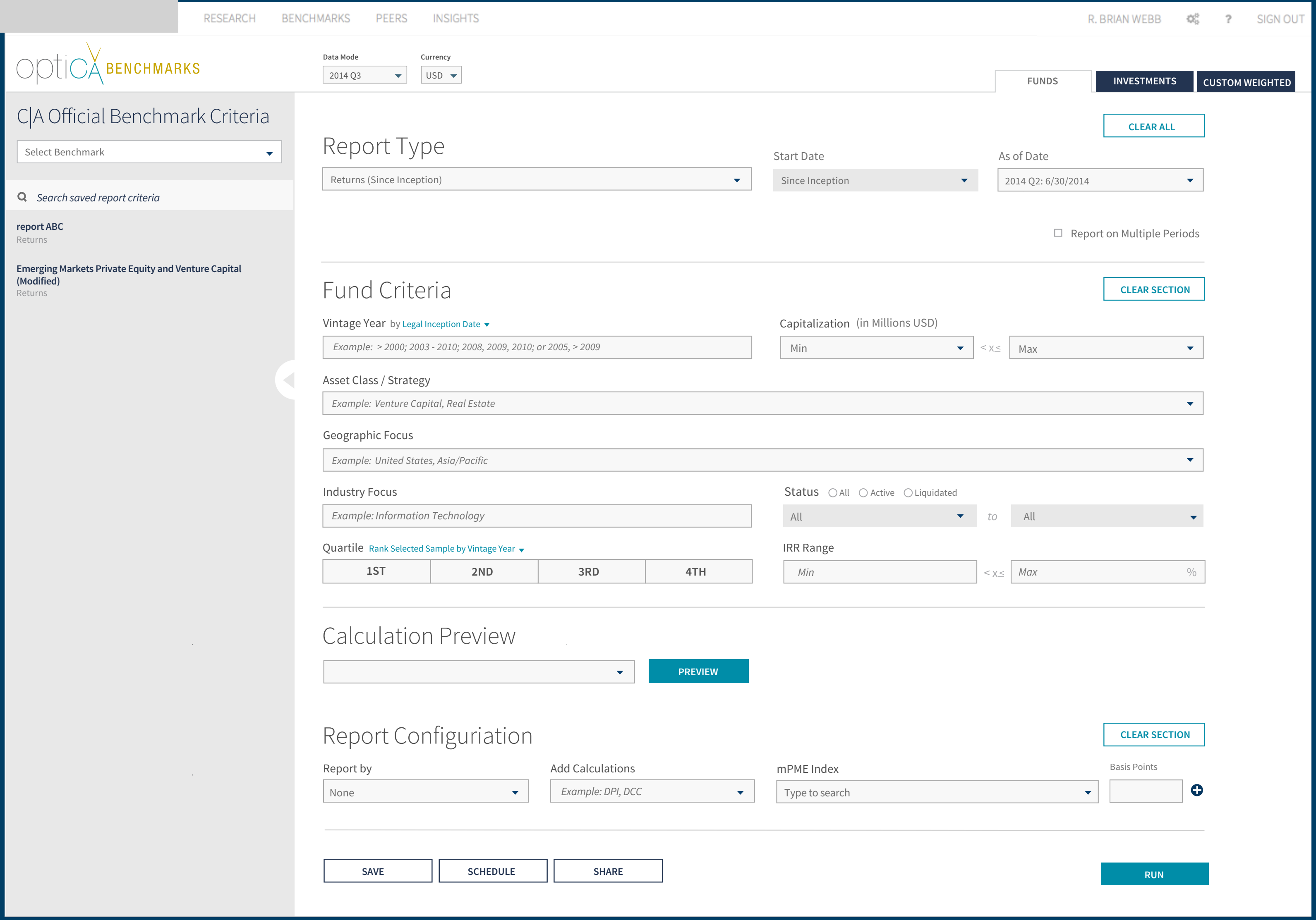


- 86.5% remaining: between 1 - 9 times
- 7% more than 10 times
- 7.5% Pattern 1: viewed 1 times only in the last 2 years on 6/7/2013 by client, Gore Creek Asset Management, LLC

8. Product Design Management

Optima

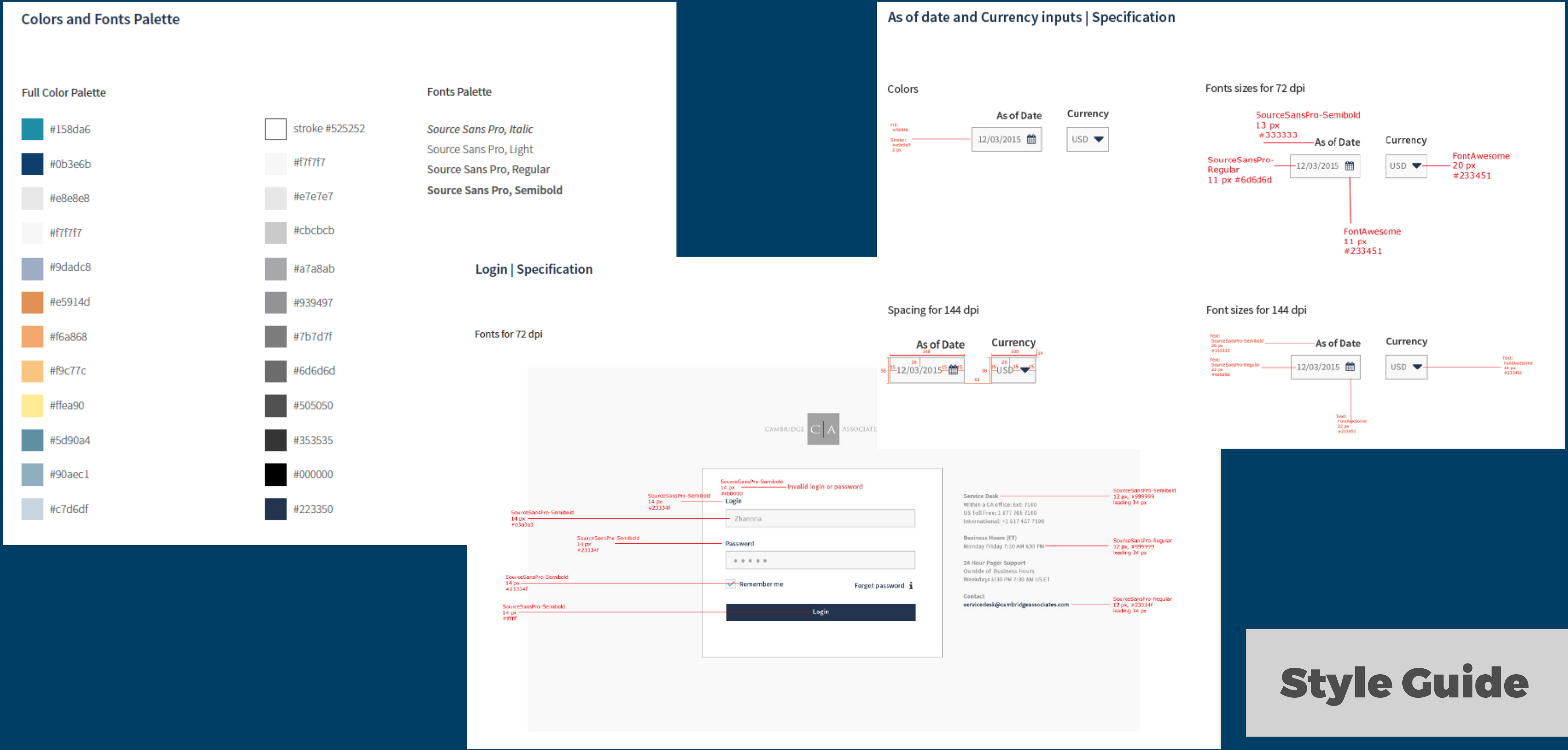
Re-Design Management



3rd Party Product Build Team - Sapient

9. Style Guide

Managed and Assisted in the creation of the new portal style guide.



Style Guide

Thank you!

The Next UX

www.thenextux.com

Objective

With four separate product, various tools, and numerous insights, reports and articles, our first objective was to perform a content Audit to determine what content was still relevant out of date, and redundant.

We decided to create an observations and behavior matrix using NetSights and Google Analytics. I was tasked to create an analytics game plan.

While working with various product teams we would perform interviews, workshops, and periodical journey mapping, By developing on going relationships with analysts and managers we create use cases, personas, journey maps and

Once we determined our primary tools and features that needed to be re-designed we created a roadmap and start to ideate possible design solutions.

After atempting to perform the re-design completely in house, the new IT Director from Sapient Techologies decided to contract Sapient for the heavy lifting with internal UX Guidence. At which point we were assigned specific tools and features to provide support, insights and perform internal testings.