

Cambridge Associates

FinTech Portal Re-Design 07/01/2014

MY CIA NAVIGATOR

Public Managers
Private Managers
Insights
Markets
Comparative Data
Performance Reporting

Markets

- Index Returns Snapshots
- CJA Exhibit Finder
- Global Currency Returns Matrix
- Interest Rates and Government Bond Yields
- Library of Market Index Descriptions
- Proprietary Benchmarks

Comparative Data

- Pool Questionnaire
- Overview Investment Pool Analysis
- Member One Stop
- Annual Analysis of College & University Investment Pool Returns (2012-13)
- Flash Statistics
- Code Keys

Performance Reporting

- CPP System®

Reporting Resources

- UPMIFA Timesaver
- Audit Assistance Workbook

Manager Notices

- Annual Manager Report

Navigator News

Learn what Private Managers can do for you
Benchmark updates
New Insights this week
Words from our clients
One Stop new features

Related News

- Canada's Venture Capital & Private Equity Association Partners with Cambridge Associates to Develop Canadian Private Equity and Venture Capital Performance Data
December 1, 2013 Press Release
- Institutional Investing in 2014: Hunt Carefully for Relative Value, Temper Expectations
December 1, 2013 Press Release
- PE Investments in ex U.S. Developed and Emerging Markets Outperformed Their Public Market Counterparts in Q2 2013
December 1, 2013 Press Release
- Has Recent Bull Market Led Investors to Lose Sight of the Value of Hedge Funds?
December 1, 2013 Press Release

Impact Investing: A Framework for Decision Making
December 1, 2013 Market Matters

How Expensive is the U.S. Market?
December 1, 2013 Market Matters

Liquid Stocks and Corporate Debt
December 1, 2013 Market Matters

Locations

About Cambridge Associates

The C|A Difference
Global Capabilities
Solving Your Challenges
News

Sign up for C|A Communications

Submit

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 Review**
- 2. Definding Primary Users**
- 3. What are you our challenges?**
- 4. External Website**
- 5. Data Visualization & Analytics**
- 6. Product Re-Design | Research Navigator**
- 7. Product Re-Design | Exhibit Finder**
- 8. Product Re-Design | Optima**
- 9. Style Guide**

1. Product Overview

What are our goals & market placement?



HOT TOPIC

COVID-19 Resources

All our latest insights on COVID-19's impact on the investment landscape, updated as things change.

CA ANSWERS

US Unemployment Data Reflects



PRIVATE INVESTMENT BENCHMARKS

US Private Equity (Legacy Definition)

Q3 2019 Final Report



PAST REPORTS

US Venture Capital

Q3 2019 Final Report



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](#)

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.

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 initiative 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

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

Sr. Financial Manager

Interviews

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

IAN ADAMS

ASSOCIATE (IA and RA)

Personas

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

DIANE DAY

DIRECTOR (In Office)

Personas



"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 information 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



Internet/Intranet

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

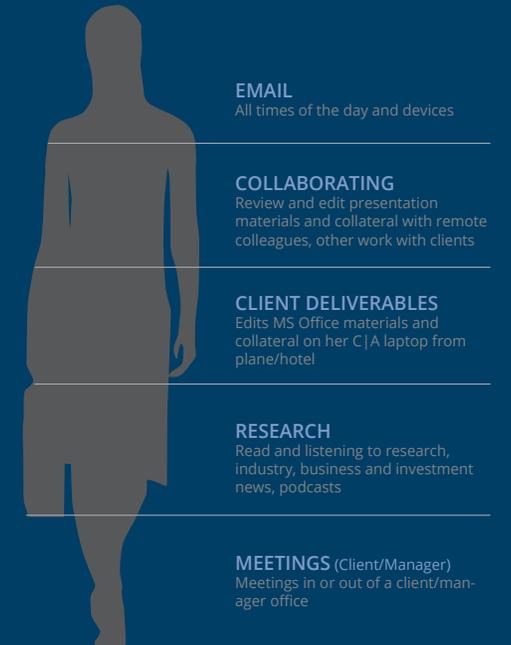
Software

MS Office

Mobile Apps

Email, news, C|A Mobile Apps

TIME ALLOCATION (In Office)



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.

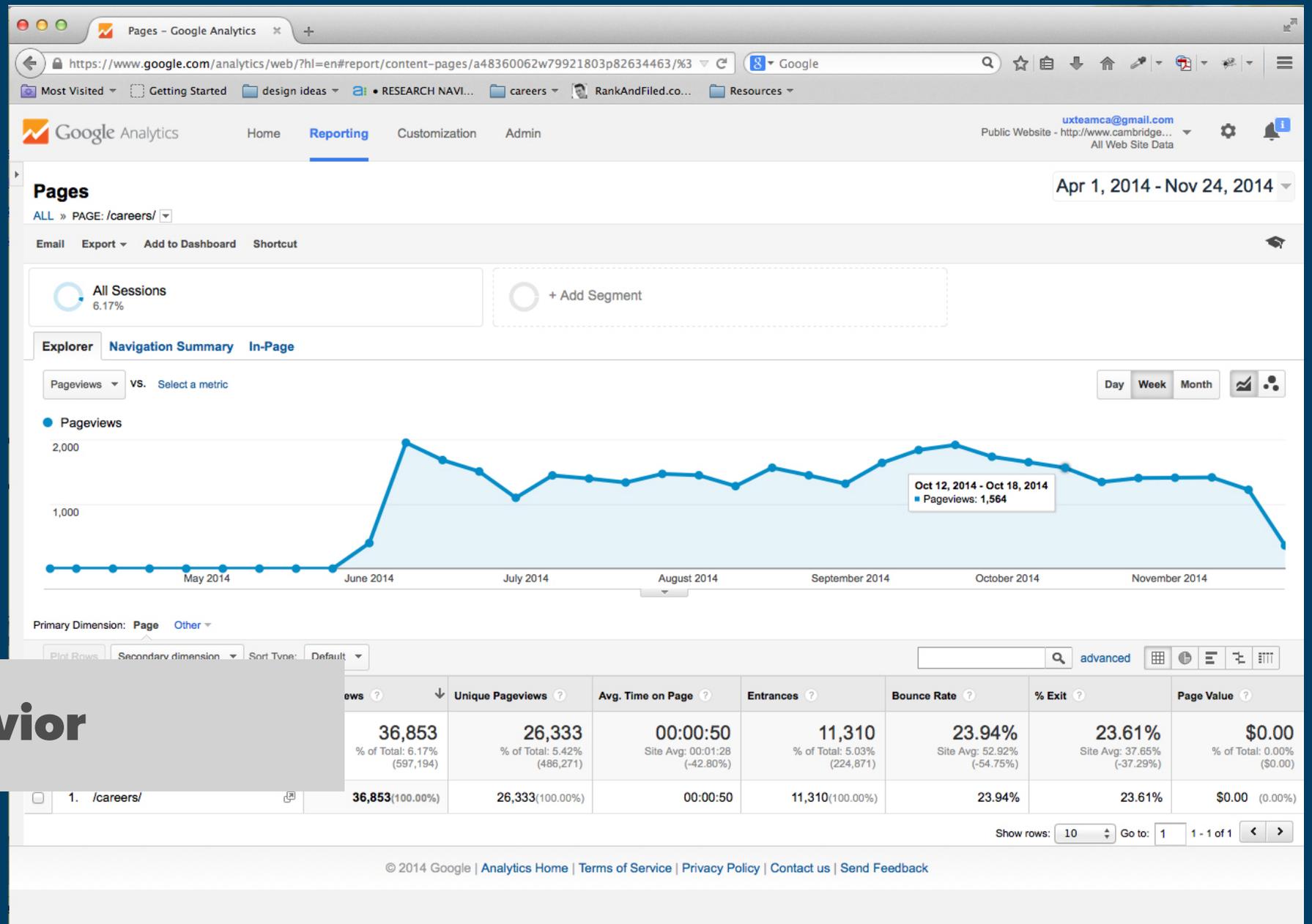
Content Strategy

All four systems have old, un-used content. 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
<ul style="list-style-type: none"> 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?

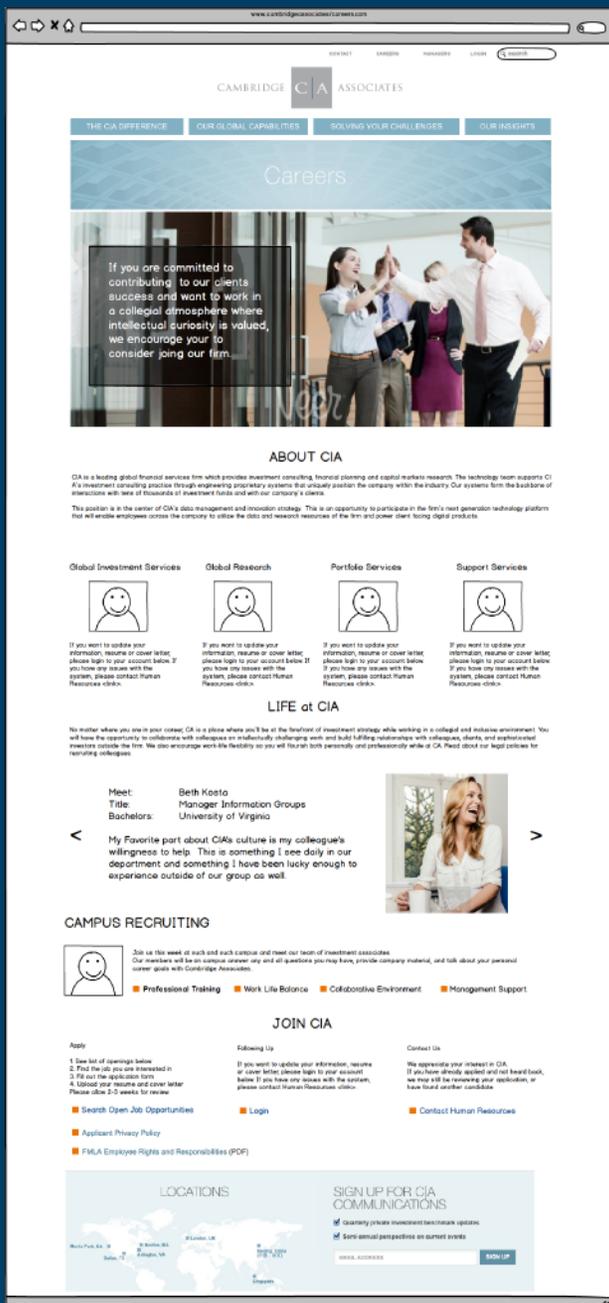
B. C A Contact
<ul style="list-style-type: none"> Where do I go if I have questions about a job posting or general questions about C A? How do I contact someone in HR directly instead of the form? <ul style="list-style-type: none"> Not sure where the message will end up. Not sure they will hear back from anyone. Not sure they are being considered for

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	
<ul style="list-style-type: none"> 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 C A	<p>JOB SEARCH</p> <ul style="list-style-type: none"> 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 do I get to a the list of jobs from <u>Opportunities at C A</u> 	<p>Join C A</p> <ul style="list-style-type: none"> 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" <ul style="list-style-type: none"> When they do, they do not realize the headers are links Go to the right navigation to Experienced Professional or Student No one 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 	<ol style="list-style-type: none"> Separate Careers page Warmer / more engaging / relatable <ul style="list-style-type: none"> Pictures / Bios / profiles day to day / relatable Remove Careers text in footer Add link to top and bottom banners Combine experienced professionals and recent grads List openings on main careers page Remove text sentence link, "explore our opportunities to see if any are...." Quotes and Case studies for different titles to show career progression
<ul style="list-style-type: none"> 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? <ul style="list-style-type: none"> 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 A	<p>APPLYING</p> <ul style="list-style-type: none"> How do I 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? 	<p>Join C A</p> <ul style="list-style-type: none"> 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 	<ol style="list-style-type: none"> Create user profile Ability to see which attachments you have uploaded Ability to change and update profile <ul style="list-style-type: none"> See status for jobs applied to See direct HR recruiter

Affinity Mapping



Balsamiq Wireframes



THE CJA 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 CJA

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.

Experienced Career Profile

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.

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 (CJA), 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 CJA

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 collaborative, 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 CJA
Investment Associate, Global Investment Services

"I joined CJA 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 CJA
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 CJA 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 CJA."

[Learn more about Global Investment Research](#)



Portfolio Services

Justin, 1 year, 2 months at CJA
Investment Associate, Performance Reporting

"CJA 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 CJA
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 CJA

No matter where you are in your career, CJA 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)

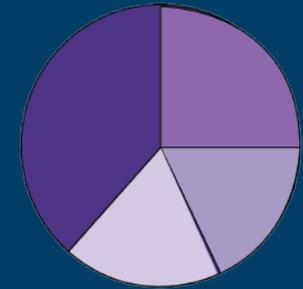


5. Data Visualization & Analytics

KPI Matrix & Informed Design



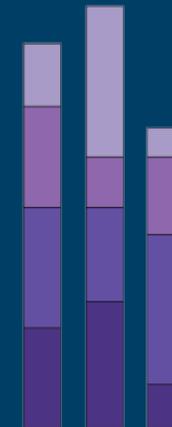
DATA VISUALIZATION 101



Google Analytics
Business Case 2016



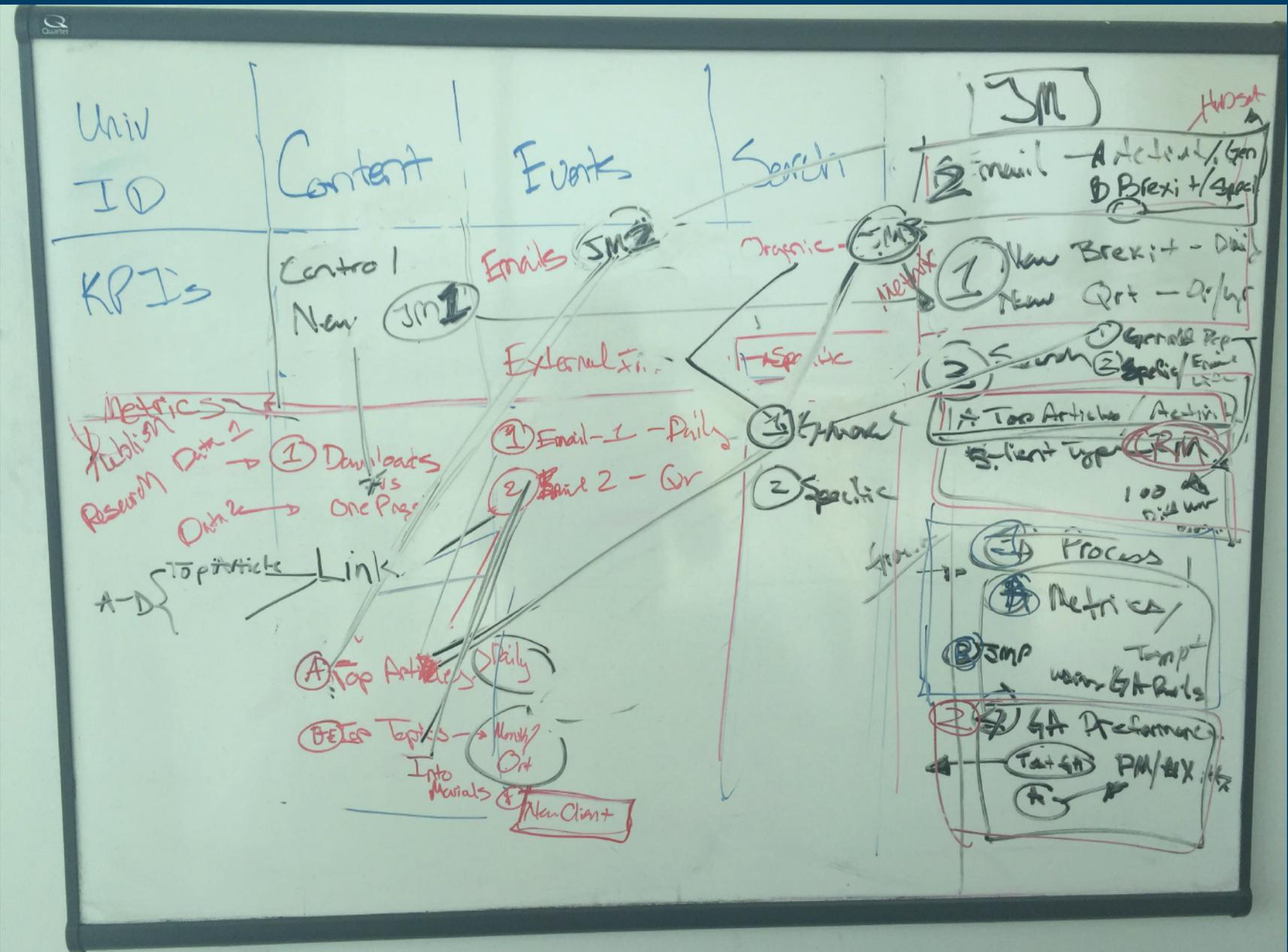
<https://www.ritumaghera.com/CAdata.pdf>



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	Traffic Channels	Direct vs Referral Search Device actions	
Universal KPIs	Subscriptions Entry Points Organic 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 *CJA Research *Performance *Insights *Managers Fees Changes	Quarterly Reports Benchmarks				
Targeted (Product Specific) KPIs	Optica Interactivity User Logins Hubspot / Email CJA External to Link to Optica	User Logins	Primary entry Client home Bookmark Ave. duration Organic / Referral 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 Position Related to: Manager data Fund data Benchmarks	Direct legacy client
Segment 2 Contract Role		Executive or Analyst							CFO
Scheduled Events 1		Email subscribers Client home External influence (Brexit)	Realted to new - content - announcements - updates	Insights Publications Release Blog Posts (reg users)	Common time Un-common activity Related to time of day		Monitor planned Activity.	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	Answer Specific insights		

6. Product Re-Design

Research Navigator

USE CASE: Strategy / Asset Class ONLY

I KNOW:
 Strategy / Asset Class: LO / Global Equity
 Status: Open

Filter 1
 CIA Know: Focus List only
 Strategy/Fund Asset: Above \$50M

I COMPARE:
 Focus List: Comments / Due Diligence
 Strategy/Fund Asset: Above \$50M
 Performance: Last month returns - above 2%

★ Yes, comments for External Viewing (FREEMIUM)
 ★ Yes, comments for NOT External Viewing (PREMIUM)
 ☆ comments, but not updated

Base Level Information ^							CIA Knowledge ^			Performance				Statistics / Market Sensitivity									
select	#	HF/LO/PV	Code	Firm Name / Assets (M)(as of)	Invest. Strategy/Asset Class	Product Strategy / Assets (M)(as of)	Fund Name / Assets (M)(as of)	Internal Only CIA Rate ^	Focus List	comments	due diligence	recent date ^	ROI	Calendar Year Returns (%) ^	PS	Index	yr	PS	Index	yr	standard deviation PS/Inx	Sharpe Ratio	value add
⊗	1	■	HsOE	Hoising & Co Ltd / \$25315 (12/31/14)	Global Equity	Hoising Global Equity Strategy / \$24710 (12/31/14)	Hoising Global Equity Strategy (Segregated Accounts) / -	I	●	★	◇	Dec/14	-15%	2014	6.0%	4.16	10th	10.08	5.17	3yrs	1175/10.64	1.66	6.49
○	2	■	HsOE	Hoising & Co Ltd / \$25315 (12/31/14)	Global Equity	Hoising Global Equity Strategy / \$24710 (12/31/14)	Hoising Global Fund plc - Hoising Global Sub-Fund No1 / -	O1	●	★	◇	Dec/14	-15%	2014	6.0%	4.16	10th	10.08	5.17	3yrs	1175/10.64	1.66	6.49
⊗	3	■	MOGE	Maverick Capital Ltd / \$8648.0 (12/31/14)	Global Equity	Maverick Long Fund Ltd / \$970.0 (12/31/14)	Maverick Long LP / --	C2	●	★	◇	Jan/15	-0.10	2015	-0.10	-1.81	10th	8.97	6.08	3yrs	1172/10.27	1.64	6.70
○	4	■	MOGE	Maverick Capital Ltd / \$8648.0 (12/31/14)	Global Equity	Maverick Long Fund Ltd / \$970.0 (12/31/14)	Maverick Long LP / --	C2	●	★	◇	Jan/15	-0.10	2015	-0.10	-1.81	10th	13.21	6.99	3yrs	1132/10.27	1.64	6.70

Base Level Information - (Large Section 1)

CIA Knowledge - (Large Section 2)

Performance - (Large Section 5)

NOTE: Large Sections Determined by - Data Polluted to Matrics / Customizable Export

USE CASE: HF / Fund List only

I KNOW:
 Strategy / Asset Class: ALL HF
 Status: Open

Filter 1
 Focus List ONLY
 Result = 232

Filter 2
 Strategy: Concentrated Long
 OR
 Performance - this comes later in this scenario
 Result = 6

USE CASE: HF / Fund List only

I COMPARE:
 Performance: Top 4 or 5

- By Firm Asset
- Fund Assets
- CIA opinion
- Performance Returns - this month
 Example: FIRM BlueSpruce 1.1% (Jan-15)

OTHER OPTION:
 The Focus list toggle to show more detail about comments and due diligence

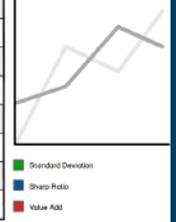
Base Level Information							CIA Knowledge			Performance				Market Sensitivity							
select	#	HF/LO/PV	Code	Firm Name / Assets (M)(as of) ^v	Invest. Strategy/Asset Class ^v	Product Strategy / Assets (M)(as of)^v	Fund Name / Assets (M)(as of)^v	CIA Rate ^v	Focus List ^v	comments ^v	due diligence ^v	last month	YTD	Quarterly	Yearly	3yrs	5yrs	10 yrs	standard deviation	Sharpe Ratio	value add
⊗	1	■	BSCL	BlueSpruce Investment LP / \$366.4 (12/30/14)	Concentrated Long / Equity / Global Sector	BlueSpruce Master Fund LP / \$366.4 (06/30/14)	BlueSpruce Master Fund LP / \$332.9 (06/30/14)	I	●	3 (3/12)	1 (5/12)	Jan/15	-1.05	-1.05	13.00	fat	9.87	14.22	1.3	-0.1	0.4
⊗	2	■	BSCL	BlueSpruce Investment LP / \$368.4 (06/30/14)	Concentrated Long / Equity / Global Sector	BlueSpruce Master Fund LP / \$368.4 (06/30/14)	BlueSpruce Master Fund Ltd / \$33.5 (06/30/14)	I	○	7 (4/14)	0	Jan/15	-1.05	-1.05	13.00	fat	9.87	14.22	1.3	-0.1	0.4
⊗	3	■	PSC	Prince Street Capital Management / \$1572.0 (04/3)	Concentrated Long / Equity / Emerging Markets	Prince Street Capital Institutional Ltd / \$554.0 (12/30)	Prince Street Capital offshore LP / \$278.0 (12/30/14)	I	●	5 (1/15)	2 (1/15)	Jan/15	-1.05	-1.05	13.00	fat	9.87	14.22	1.3	-0.1	0.4
⊗	4	■	PSC	Prince Street Capital Management / \$1572.0 (04/3)	Concentrated Long / Equity / Emerging Markets	Prince Street Capital Institutional Ltd / \$554.0 (12/30)	Prince Street Capital offshore LP / \$286.0 (12/30/14)	I	○	2 (1/15)	0	Jan/15	-1.05	-1.05	13.00	fat	9.87	14.22	1.3	-0.1	0.4
⊗	5	■	PCO	The Rock Creek Group / \$10290.0 (11/30/14)	Concentrated Long / Equity / Sub-Sectors A	Kimberlin Frontier Africa Master Fund LP / \$87.8 (04/1)	Kimberlin Frontier Africa Master Fund (US) LP / \$412.0 (09/31/14)	I	●	6 (6/10)	1 (1/12)	Jan/15	-1.05	-1.05	13.00	fat	9.87	14.22	1.3	-0.1	0.4
⊗	6	■	PCO	The Rock Creek Group / \$10290.0 (11/30/14)	Concentrated Long / Equity / Sub-Sectors A	Kimberlin Frontier Africa Master Fund LP / \$87.8 (04/1)	Kimberlin Frontier Africa Master Fund Offshore LP / \$46.6 (09/1)	I	○	3 (7/12)	0	Jan/15	-1.05	-1.05	13.00	fat	9.87	14.22	1.3	-0.1	0.4

Base Level Information - (Large Section 1)

CIA Knowledge - (Large Section 2)

Performance - (Large Section 5)

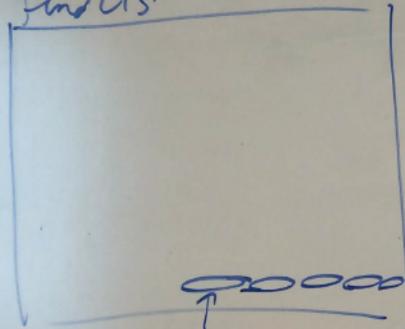
Gathering Use Cases



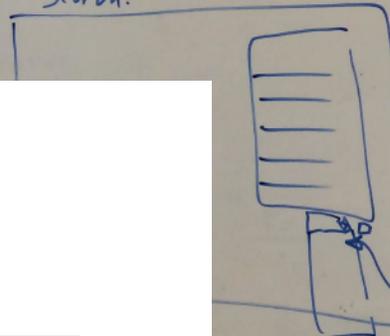
	A	B	C	D	E	F
1	Competitors' Social Media Landscape					
2	Company	ION Relation	CIA relation / persona	HQ	Global	Website / Reference
3	ION Chart					
4	Aksia	Research Navigator	Independent hedge fund research and advisory firm	NY	Yes	http://www.aksia.com/index.htm
5	Albourne (Albourne Village - Social)	Research Navigator		London	Yes	https://www.albourne.com/albourne/home
6	Mercer	Research Navigator		WDC	Yes	http://www.mercer.com
7						
8	AltX	Portfolio Analytics		CA	?	http://www.getaltx.com
9	Caissa	Portfolio Analytics		NYC	Yes	http://caissallc.com/?gclid=CPK7mvXqhsICFcdj7AodYHIAbA
10	Novus	Portfolio Analytics		NYC	Yes	http://www.novus.com
11	RiskMetrics (MSCI)	Portfolio Analytics				http://www.msci.com/products/riskmetrics.html
12	(BNY Mellon)					https://www.bnymellon.com
13	HedgeMark	Portfolio Analytics				https://www.hedgemark.com
14						
15	MSCI - acquired 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				
		Client Data				
29	Wisnre					
30						

Competitor Analysis

Fund List



Search.



- Product internal information (ratings, primary role classification) into separate tabs? - Optim?
- Firm Information
- Product Information
- Performance (Returns - AACE for primary series) Default BM - does fund selection give correct p.s.?
- Portfolio
 - Portfolio Description
 - Portfolio Characteristics
- Contracts
- Investment Approach
- Fund Information

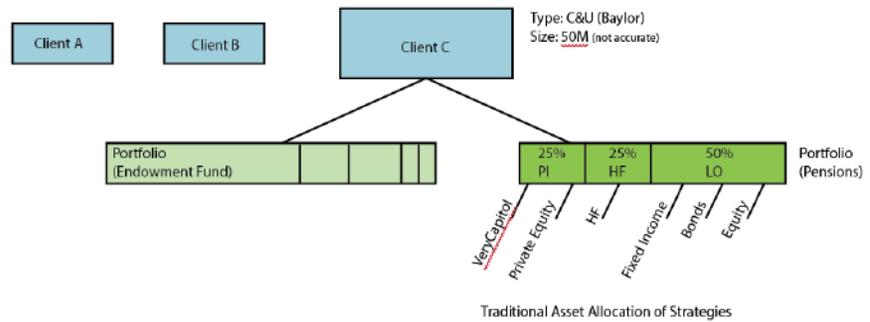
Note: - Same order on Custom PDF - change on profile?

HF: Short positions
 Exposures: Fund of fund holdings
 not exported to Excel - OK?

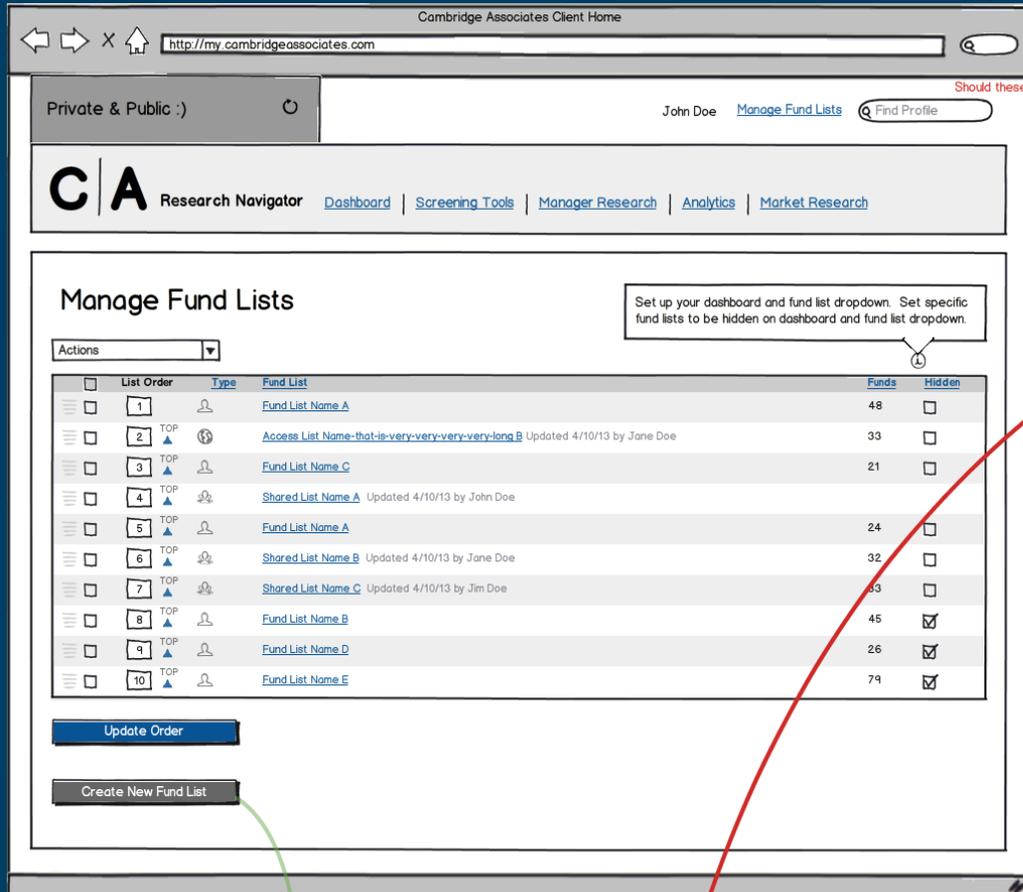
Select P.S.? - Because Fund gets lost...
 add vehicle type.

Profile
 (New) Export to Excel

Member One Stop (pool of peers, by type or size of company)



Journey Mapping



Create New Fund List

Fund List Name
Fund List A

Search for colleagues to share this list with and then specify if they can also edit the list by selecting "List Administrator".

Name Admin Delete

Find Name Cancel Save

Actions

- Duplicate
- Share
- Delete

OR

Opens modal window- "Are you sure?"

Fund List Icons TBD

- Private
- Shared
- Access
- Client

Share Fund Lists

Share the following fund lists: Fund List Name A, Shared List Name B, Fund List Name B, Access List Name D

Search for colleagues to share these lists with and then specify if they can also edit the list by selecting "List Administrator". To review who already has access to an individual list, please close window and select the individual list details.

Name
Giacomo Guizzoni

Find Name

Drag rows here to set the fund list order on this page and throughout the Research Navigator via the dropdown.

Hidden lists do not appear in the dropdown across the platform.

This is also the order on the new dashboard.

Public Research Navigator - PREMIUM

Peers Markets Performance Reporting Research Publications Manager Navigator Benchmarks

Research Navigator Dashboard Screening Tools Manager Research Analytics Market Research

CURRENT LISTS MANAGER SEARCH FILTER 1

List 1
 List 1
 List 1

Hedge Fund Long-Term

Active Funds Only
 with Focus List only

Geographic Currency

only use current physical location
 only current fund list location

Internal RATING

Rate Primary Role Classification Fund Investment Evaluation Monitoring

SEARCH Advanced changes according to Fund Type (hedge or long)

FILTER 2

Manager Info
 Product Strategy
 Most Recent Comments
 Strategy HQ
 Most Recent Comments

Vehicle Rajge (M)

Manager Assets

Strategy Assets

Save Search Criteria

Search

FILTER 3

Rate	Fund 1	Fund 2	Fund 3	Fund 4	Summary
					Pop Up
Location					
Comments					
Due Diligence					

Save Search Save List

Save Lists

Create New Search
 Add to Existing

Save

Balsamiq Wireframes

Mid-Fidelity

Review Manager Profiles

My Recently Viewed Manager Profiles

Type	New CJA Documents	New CJA Comments
Public Managers	5	5
Private Managers		5
Insights		5
Markets		5
Comparative Data		5
Performance Reporting		5

CJA Research Navigator Web Event

Research Perspectives: Infrastructure Investing and
 November 21, 2013 - Following on our April presentation, Jeff Lang, Managing Director and member of our Hard Asset research team, discussed the return expectations for different assets, and suggestions for infrastructure investments that are attractive elements of infrastructure investing, and the considerations.

✂ Show More Presentations

Features

New to Public Investments Research Navigator!
 Long-only Manager Profiles
 Learn more about our rollout of Long-only Managers

Locations



About Cambridge Associates

The CJA Difference
 Global Capabilities
 Solving Your Challenges
 News

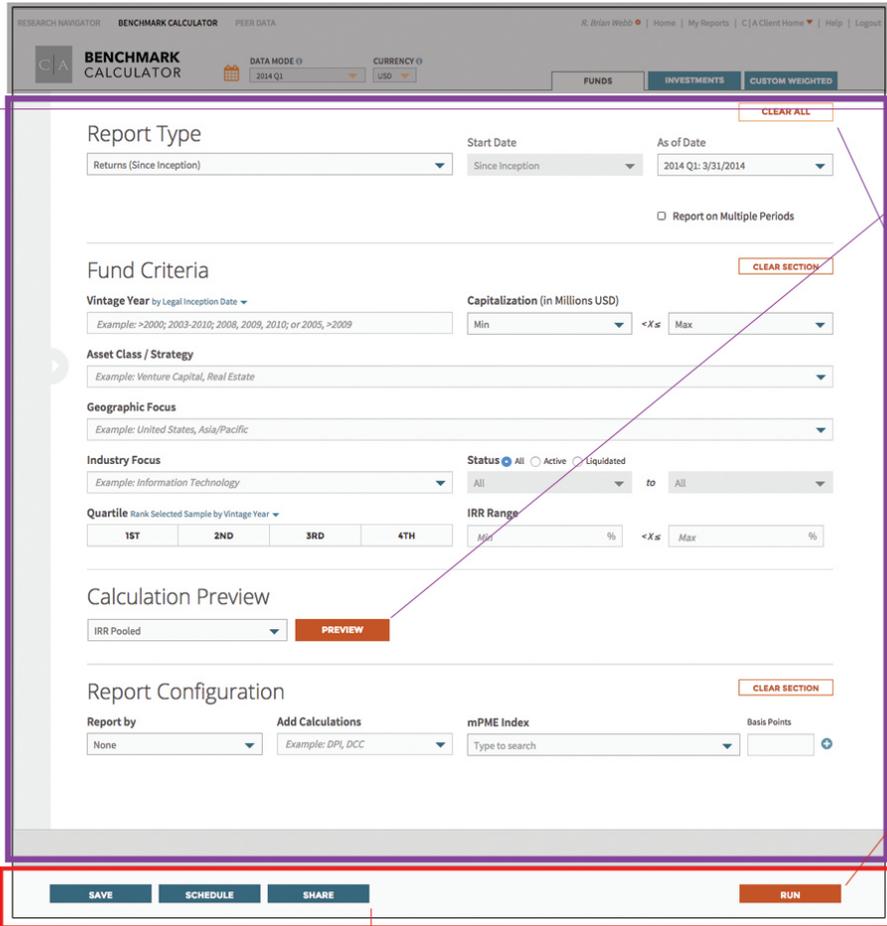
Support

Technical Assistance
 Contact Us

Sign up for CJA Communications

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Email Address



CONTAINER BUTTONS

Primary Button

Font Color: #ffffff
 static bkcolor: #e5915d
 hover bkcolor: #f6a868
 thinking bkcolor: #xxxxxx
 active bkcolor: #

Universal Font Style: Mon
 Universal Button Size:

Secondary Button

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

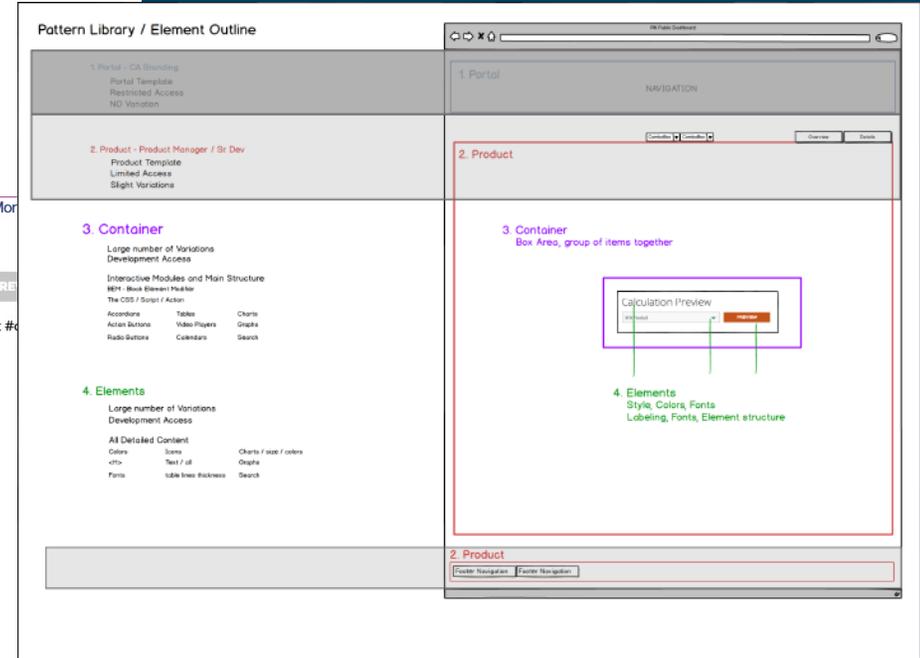
PRODUCT BUTTONS

Primary Button

RUN
 static bkcolor: #e5914d
 hover / active bkcolor: #f6a868e

Secondary Button

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



Component Library

7. Product Re-Design

Exhibit Finder

Published Research - KPI metrics																					
General		6/1	7/11	7/12	7/13	7/14	7/15	7/17	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 Rate		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													/	/	2.1	0.8				
Brexit Outlier or Harbinger?	A15																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 rate. Leaving the E. Union?	A9		2.9	3.2	6.7	2	2.6		1.3	/				/	/			1.9			
Investment Office staffing, Oversight Costs and Governance: 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? Scandals, recession, and impeachment, yet Brazilian stocks are flying	A5		2.6			3.9	/		1.3	/											
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			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

User Activity Analysis

UX Data Analysis: Exhibit Finder / Net Insights

Results

Exhibit Finder Views - 2015

Out of the total 777 exhibits

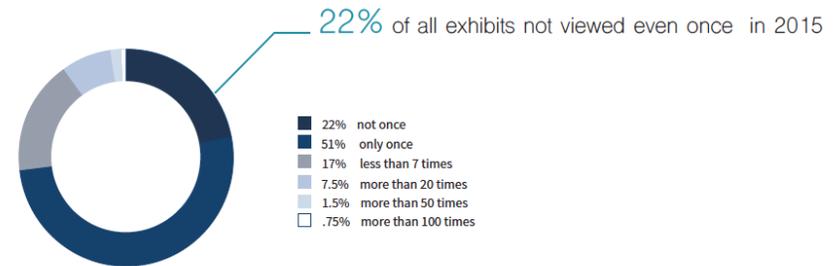
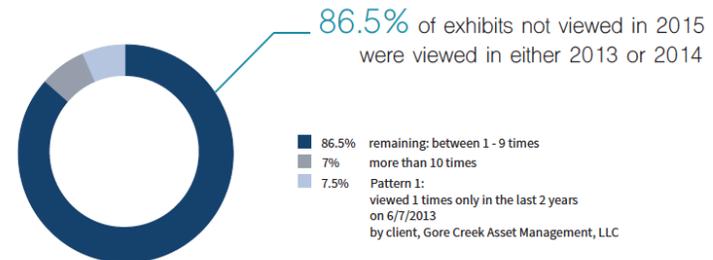


Exhibit Finder Views - 2013 & 2014

Out of the total 777 exhibits



8. Product Design Management

Optima

Re-Design Management



Data Mode: 2014 Q3
Currency: USD

FUNDS INVESTMENTS CUSTOM WEIGHTED

CJA Official Benchmark Criteria

Select Benchmark

Search saved report criteria

report ABC
Returns

Emerging Markets Private Equity and Venture Capital
(Modified)
Returns

Report Type

Returns (Since Inception)

Start Date: Since Inception

As of Date: 2014 Q2: 6/30/2014

CLEAR ALL

Report on Multiple Periods

Fund Criteria

CLEAR SECTION

Vintage Year by Legal Inception Date

Example: > 2000; 2003 - 2010; 2008, 2009, 2010; or 2005, > 2009

Capitalization (in Millions USD)

Min < X ≤ Max

Asset Class / Strategy

Example: Venture Capital, Real Estate

Geographic Focus

Example: United States, Asia/Pacific

Industry Focus

Example: Information Technology

Status All Active Liquidated

All to All

Quartile Rank Selected Sample by Vintage Year

1ST	2ND	3RD	4TH
-----	-----	-----	-----

IRR Range

Min < X ≤ Max %

Calculation Preview

PREVIEW

Report Configuration

CLEAR SECTION

Report by: None

Add Calculations: Example: DPI, DCC

mPME Index: Type to search

Basis Points: +

SAVE SCHEDULE SHARE

RUN

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