
Great design is measured by outcomes, not deliverables.

UX Case Study

➤ **BNY** Treasury Services API // Word Doc to Live Product



2 phases. 1 complete product ecosystem.

PHASE 1 // BUILT THE WEBSITE

01 Content strategy

Word doc handover → pain point analysis → user personas

02 Information architecture

IA diagrams + affinity mapping with internal stakeholders

03 Design system

Built Treasury Edge Design System with the team from scratch as Kernel wasn't ready

04 Website build

Low-fi → hi-fi → full API portal website direction and UX strategy based on compliance & accessibility

PHASE 2 // ADDED THE INTELLIGENCE

05 Eliza UX design

Conversation IA · happy path · failure states · compliance-first approach

06 Chatbot UI

Floating Eliza icon entry point on the landing page of site I already designed

07 Eliza rebrand

Repositioned from dark theme to white space minimal design aesthetic

08 Kernel Design Library contribution

Contributed to Figma components for BNY's new enterprise design system

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The brief was a typical Word document.

Tutorial Prerequisites

Overview

PRE-REQUISITES

With just a few simple steps, you can gain access to the Funds Transfer API to make domestic payments. For comprehensive documentation on how to get started, please visit the [Getting Started](#) page. A brief overview is as follows:



1. Log into the [BNY Mellon Marketplace](#). Marketplace credentials are required to subscribe to the APIs you are interested in.
2. Initiate a subscription. The API subscription page provides you with a [Consumer Key and a Consumer Secret](#) which are needed for Authentication.
3. Obtain a client-specific [digital certificate](#) by providing a Certificate Signing Request (CSR) to your BNY Mellon onboarding team. API authentication requires the certificate signed by BNY Mellon Certificate Authority (CA).
4. Next, get an [OAuth 2.0 access token](#) using the application credentials which consist of Consumer Key, Consumer Secret, and the digital certificate. API requests are authenticated using the OAuth 2.0 protocol.
5. Generate a [Digital Signature](#). This is needed to initiate payments.
6. Finally, with all of the above, you are ready to initiate an API Call.

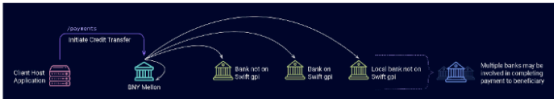
Tutorial: Make a Wire Payment - SWIFT MT103

Overview

BNY Mellon's Direct Clearing service provides the ability to send and receive payments through high-value payment networks on your own behalf or for underlying clients for USD and MCCY in over 30 currencies and various MT and MX/CBPR+ formats. By leveraging our network of 2,000+ correspondent banking clients in over 150 countries, and with direct connectivity to the major clearing market infrastructures, we offer one of the most effective payment delivery services in the market.

With our [Initiate a Credit Transfer](#) via Funds Transfer API, you gain access to a secure and reliable solution that combines flexibility and global connectivity for all of your Funds Transfer needs.

HOW IT WORKS



CUSTOMERS USING THIS SOLUTION

The Swift MT103 Funds Transfer message type is for Financial Institutions initiating credit transfers for clients. In a serial payment method, as seen below, an ordering financial institution transmits the funds transfer instructions (i.e., a Swift MT 103 message) to the next financial institution in the payment flow.

The brief was a typical Word document.

5. Receive an API response.

The Response Body contains two elements: metadata and result.

```
{
  "metadata": {
    "success": true,
    "requestId": "dbbae877-2895-4f7b-b720-66d0efeeca34",
    "count": 1
  },
  "result": {
    "xrefId": "1e2c5156-7ffd-4cbc-931f-2a7b57d91e70",
    "clientReferenceId": "96f9213e-b8e1-41ac-a8a4-71cc4d21bd57",
    "timeReceived": "2022-08-11T18:35:59.711Z",
    "clientDescription": "Payment for Services",
    "status": "Received"
  }
}
```

NOTE: You will need xxx above to make a Tracking call.

If you receive an error...

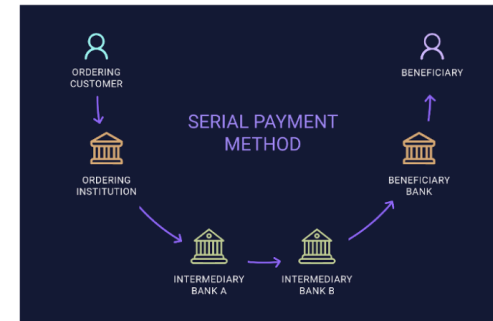
The 'success' field in the response will be returned as false.

An example of a [General API Error](#) is found below.

```
{
  "metadata": {
    "success": false,
    "requestId": "08ce944f-8ac2-44fd-b8ea-5e59056b309c",
    "count": 0
  },
  "error": {
    "code": "1003",
    "description": "Invalid digital signature: the request must be signed with client specific private key"
  }
}
```

You may also receive an [API Gateway error](#) which are caused by authorization problems with the request at the BNY Mellon API Gateway.

An MT103 message allows the exchange of single customer credit transfers using all MT103 fields. This message type is sent by or on behalf of the financial institution of the ordering customer, directly or through (a) correspondent(s), to the financial institution of the beneficiary customer.



HOW TO INITIATE A WIRE PAYMENT WITH SWIFT.MT103

For full specifications for this API request, please visit the [Funds Transfer Initiate Credit Transfer page](#).

1. First, use this endpoint and set your headers to submit a [USD Funds Transfer](#) in the Swift MT103 format.

```
POST (base-url)/payments/{version}/payments
-H 'authorization: Bearer {Access_Token}' \
-H 'content-type: application/json' \
-d '
```

2. Next, format the request body.

This API request body contains two required elements: metadata and request.

```
{
  "metadata": {
    "requestId": "dbbae877-2895-4f7b-b720-66d0efeeca34",
    "idempotencyKey": "20230707123456",

```

Initial Process

WHAT THE API TEAM HANDED OVER

- × Raw unstructured Word document technical content
- × 6-step API prerequisite flow (lacked IA)
- × Backend API tutorial text // dense, developer-only
- × No hierarchy , no personas, no agile process, no design spec

WHAT I DID FIRST

- Identified 4 core pain points with solutions
- Defined user personas: PMs, Developers, Treasurers, Sales
- Proposed IA before any wireframe was drawn
- Made sense of it // before BNY stakeholders had a brief (too imp. 🤪)

The screenshot displays the Axure RP software interface. On the left is a vertical sidebar with a dark blue header containing the Axure logo and a plus icon. Below the header are four categories: 'File' (with a document icon), 'Assets' (with a plus icon), 'Tools' (with a toolbox icon), and 'Variables' (with a gear icon). The main workspace area has a dark blue header with the text 'All BNY Work' and a dropdown arrow, followed by 'Team project' and a blue pill labeled 'Free'. Below the header is a list of pages under the heading 'Pages'. The first page, 'API Website Revamp + Design System', is highlighted with a light blue background. The subsequent pages are 'BNY Pershing Monitoring Dashboard', 'Transaction overview dashboard', 'Service Navigator Project', 'Verizon Repair Screen flow', 'BNYM Zelle User Testing', 'Project delivery Timeline Diagram', 'Meetings', 'API Logo', and 'Payment Audit Report Summary Layo...'. A search icon and a plus icon are located in the top right corner of the page list area.

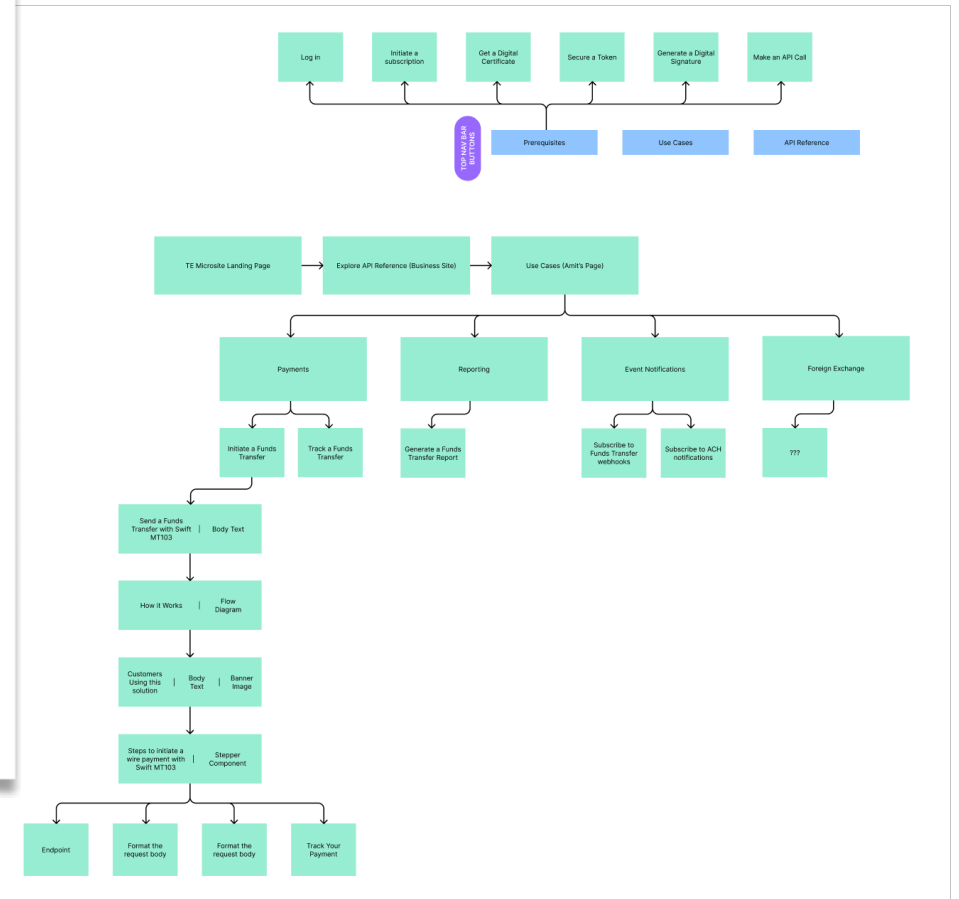
Pain Points & Solutioning

- Tutorial Prerequisites need to be on every page as a common component (Solution - Could be used as button header on the top that opens into a modal)
- Diagrams already created for TE website need to be reused (Solution - incorporate a new color palette)
- Business version should be more enticing, fun UX unlike the tech API version
- New tiles could be added in the near future, a list view is more efficient

User Personas

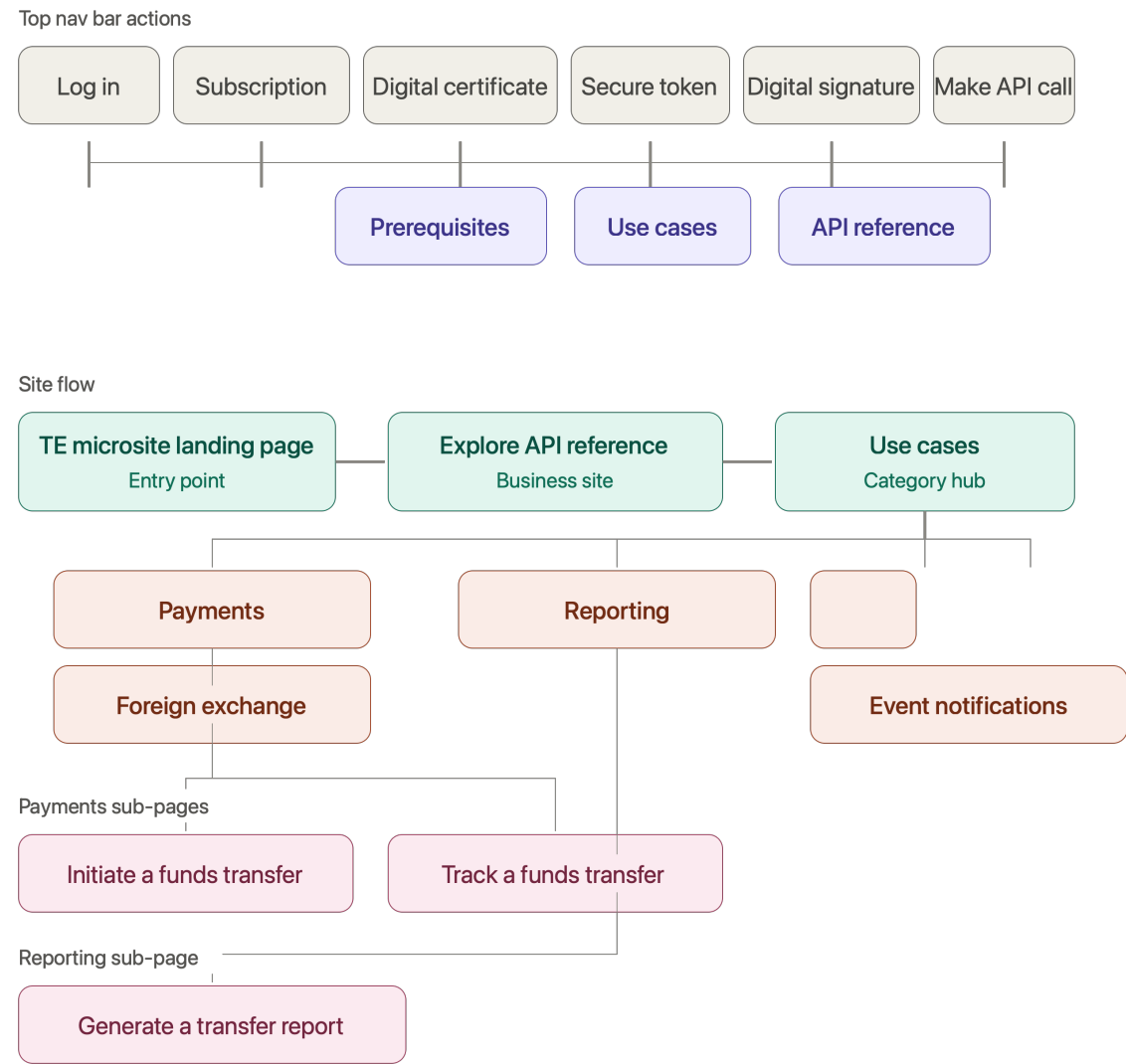
A mix of both business and developers

- Product Managers for financial products (wire payments)
- Product managers for APIs, Treasurers
- Relationship Managers/Sales
- Business Analysts



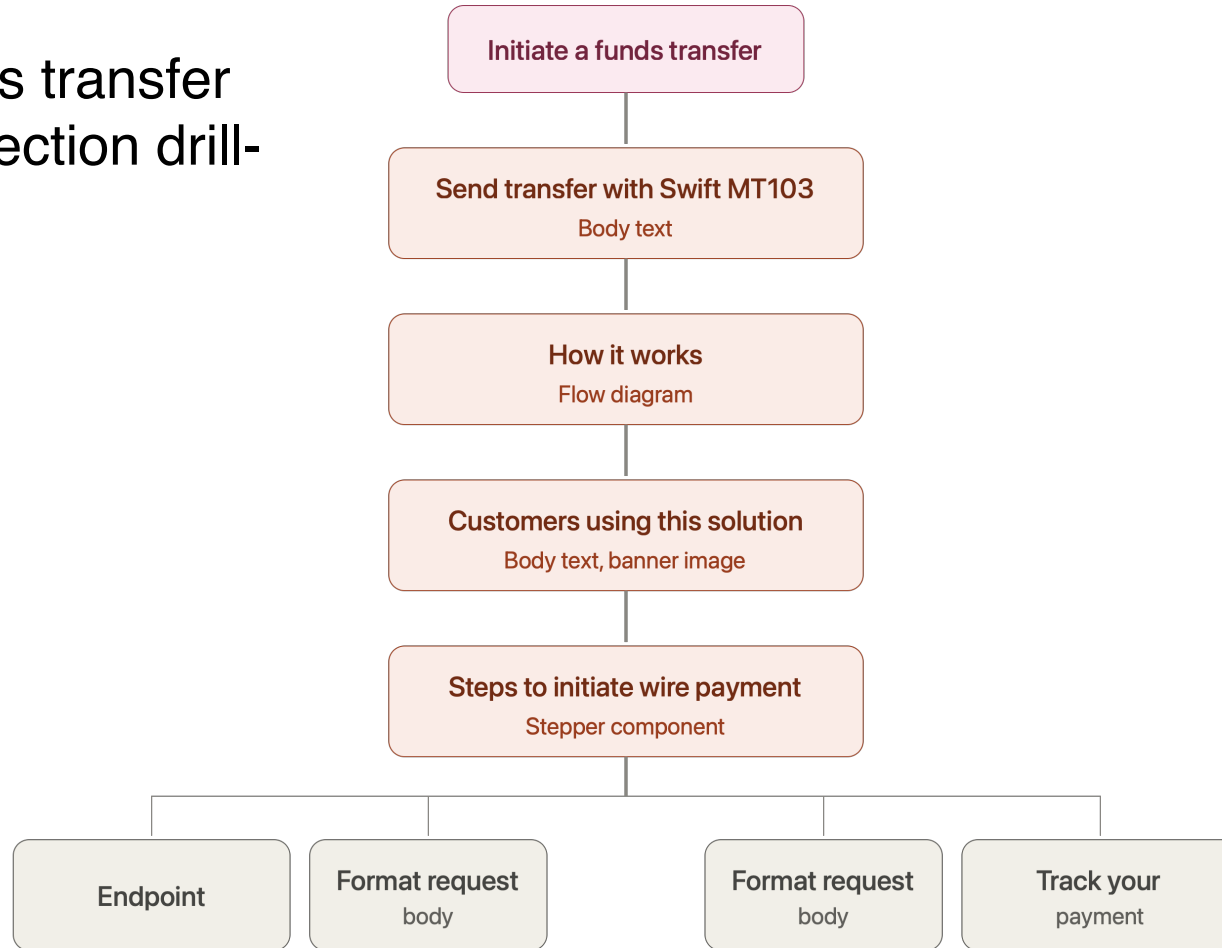
IA before wireframes. *Always!*

// Site architecture



IA before wireframes. *Always!*

// Funds transfer
page section drill-
down



Affinity mapping on
boardroom walls
with stakeholders

Rapid sketching
(creative 4) with
selected BNY
users

3 rounds of IA
iteration

Leadership
decision gates
before wireframes
began

Heuristic Analysis. Affinity Mapping. Real insights.

User mental models		Content problems		Design gaps		IA decisions	
Developer thinks in endpoints not use cases	PM wants outcomes not technical steps	Word doc has no hierarchy	Prerequisites buried inside tutorials	Kernel design system not ready	No component library for API docs	Pre-requisites as global component	Use cases as category hub
Treasury needs compliance proof	Sales needs business language	Diagrams exist but no brand consistency	Business + dev content <i>mixed</i> on same page	Typography spec needed for code blocks	Dark theme needed for dev audience	Stepper for step-by-step flows	Code editor as reusable pattern

// These sessions directly the decision to build a separate design system...

WIP - Kernel Design System Revamp

Before

Kernel Design System

Component Library

Pages

Introduction

Color

Spacing Variables

Card Spacing sample

Type

Styles

Icons

Data Visualization

Using A Swap Component

-----Atoms-----

Avatars

Badge

Button

Button Split

Button Toggle

Cards

Checkbox

Chips

Date Picker

Divider

Filter Chips

Flag

Form Fields

Popover

Layers

Thumbnail

KERNEL

DESIGN SYSTEM

Updated Date: July 8 2024

Version: 0.9

BNY

NEXEN

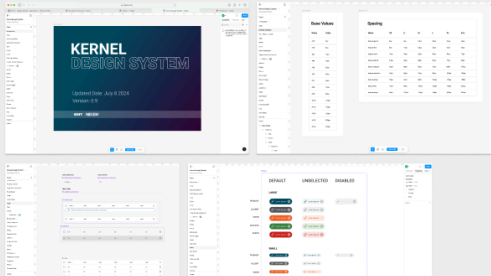
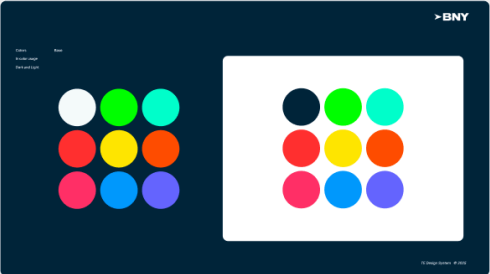
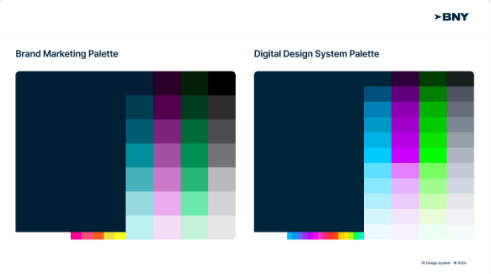
Chips

	DEFAULT	UNSELECTED	DISABLED
LARGE			
PRIMARY	Lorem Ipsum	Lorem Ipsum	Lorem Ipsum
ACCENT	Lorem Ipsum	Lorem Ipsum	
WARN	Lorem Ipsum	Lorem Ipsum	
SUCCESS	Lorem Ipsum	Lorem Ipsum	
ERROR	Lorem Ipsum	Lorem Ipsum	
SMALL			
PRIMARY	Lorem Ipsum	Lorem Ipsum	Lorem Ipsum
ACCENT	Lorem Ipsum	Lorem Ipsum	
WARN	Lorem Ipsum	Lorem Ipsum	
SUCCESS	Lorem Ipsum	Lorem Ipsum	
ERROR	Lorem Ipsum	Lorem Ipsum	

WIP - Kernel Design System Revamp

After

Design System



WIP - Kernel Design System Revamp

Credit Profile

FDIC FDIC insured - Backed by the full faith and credit of the U.S. Government

BNY NEXEN

Persona

TreasuryEdge SM | Overview Accounts Payables Receivables Repository Insights Reports Resources More

Client Analytics & Insights / Verizon LLC / Payments in a Box

Payments in a Box

Overview Commercial Treasury

Back Summary Corridors Counterparties Repairs Inquiries

Insights Breakdown

Total Overdrawn Time
71 Hours, 36 Mins

Key Hours
0 (MIDNIGHT) 6 (6AM)

Affected Days
June 25, 2025 (5 Days)

Credit Used

\$65,200.00

Balance increase by 4% from prior day

Peak Minimum Balance

\$100,200.00

June 4 was the lowest minimum balance

Settlement Method

35% 10% 20% 30% 5%

Total

Fed In Chips In Books Fed Out Chips Out

Settlement Method

35% 10% 20% 30% 5%

Total

Fed In Chips In Books Fed Out Chips Out

Key Counter Parties for UNITED OVERSEAS BANK LIMITED and their Geographical Distribution

Batch Information

SEC (Standard Exchange Code) IAT - International ACH Transaction

Destination Country United Kingdom - UK

Batch Information

SEC (Standard Exchange Code) IAT - International ACH Transaction

Destination Country United Kingdom - UK

Batch Information

SEC (Standard Exchange Code) IAT - International ACH Transaction

Destination Country United Kingdom - UK

Content

Components / Data Table

Documentation Link

Data Table

Powerful table and datagrids built using AG Grid.

Light Usage

Example in Standalone Block

Table Title

Payments Imports Adjustments

Add Filter Filter Filter Filter

☐	Account Name & No.	Issuer	Recipient	Category	Amount	Type	Date
▼	Benjamin Smith 1234567890	DISH Network Communication	Emily Johnson	Telecom	\$12,000.23	Wire	May 13, 2025
▼	Sarah Lee 9876543210	Comcast	Michael Brown	Telecom	\$8,531.75	Real-Time Payments	May 13, 2025
▼	David Martinez 1122334455	T-Mobile US, Inc	Olivia Davis	Telecom	\$9,512.00	Wire	May 13, 2025
▼	Emily Johnson 5566778899	DISH Network Communication	John Smith	Telecom	\$11,210.25	Wire	May 13, 2025
▼	Michael Brown 9988776655	Comcast	Sarah Lee	Telecom	\$13,990.00	Real-Time Payments	May 13, 2025
▼	Benjamin Smith 1234567890	T-Mobile US, Inc	Emily Johnson	Telecom	\$12,000.23	Wire	May 13, 2025
▼	Sarah Lee 9876543210	DISH Network Communication	Michael Brown	Telecom	\$8,531.75	Wire	May 13, 2025
▼	David Martinez 1122334455	Charter Communication	Olivia Davis	Telecom	\$9,512.00	Real-Time Payments	May 13, 2025
▼	Emily Johnson 5566778899	Comcast	John Smith	Telecom	\$11,210.25	Wire	May 13, 2025
▼	Michael Brown 9988776655	T-Mobile US, Inc	Sarah Lee	Telecom	\$13,990.00	Real-Time Payments	May 13, 2025

Showing 10 of 4500 results Load More

Example in Dashboard & Full page

Documentation V10.0

Dashboard Payments Manage Payments

Search

Platform

Overview

Insights

Multi-Bank Reporting

Payments in a Box

Liquidity

Payables

Payments Imports Adjustments

Add Filter Filter Filter Filter

☐	Account Name & No.	Issuer	Recipient	Category	Amount	Type	Date
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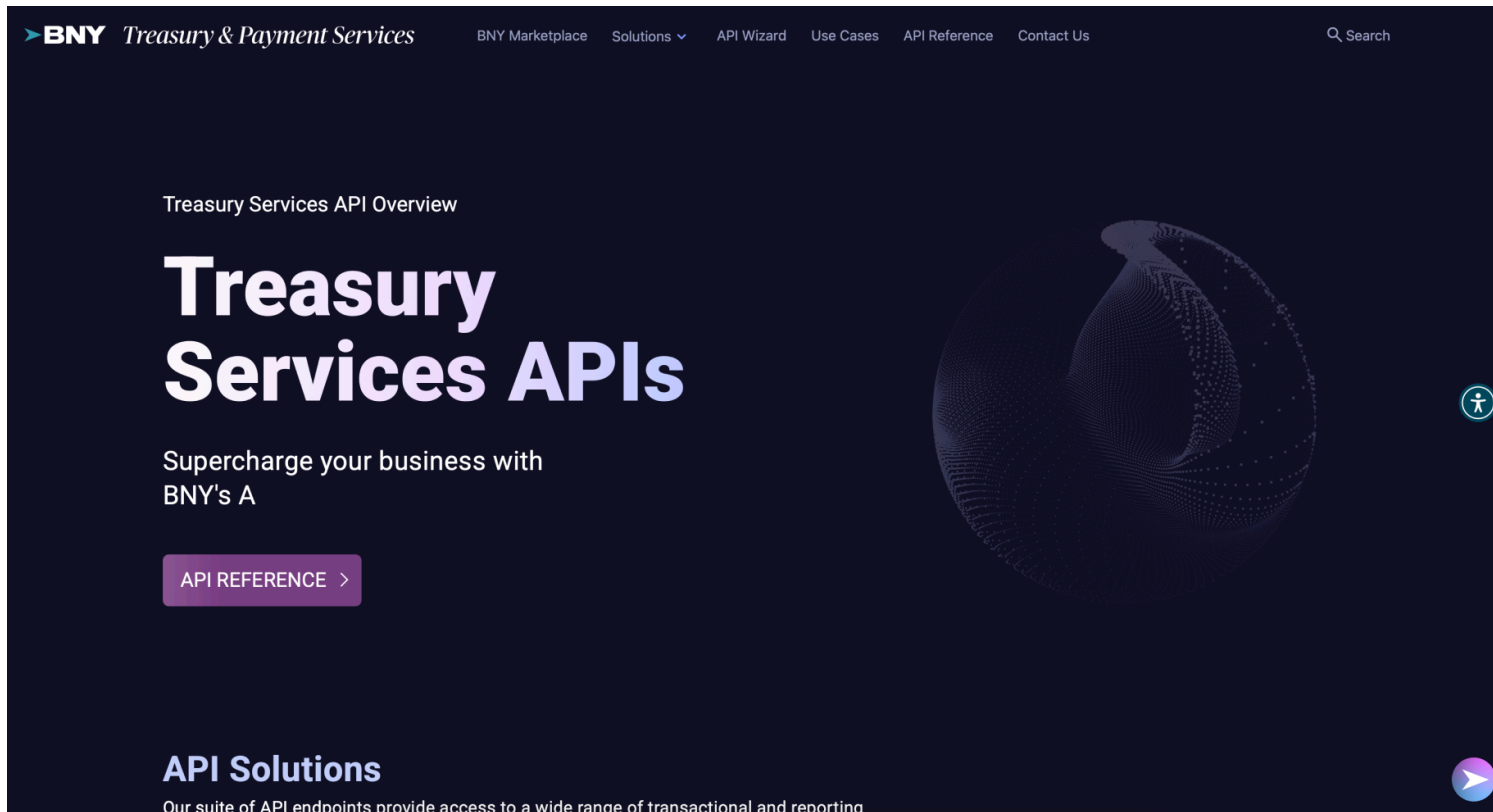
WIP - Kernel Design System Revamp

Treasury Edge Design System

The team Named. Versioned. Documented this from scratch.

	Typeface Roboto // 6 headline sizes + paragraph scale + Roboto Mono for code
	Color tokens Dark navy base, gradient buttons, lavender sub-headers, status legend (green/amber/red)
	Icon library Full custom icon set aligned to financial product vocabulary
	Components Cards, tables, steppers, code editor, accordions, sidebars, FABs
	Data viz Line charts, pie charts, maps - co-contributed to new Kernel system
	Accessibility WCAG AA - spacing variables, contrast ratios, keyboard nav specs

From Word Doc to Live Product



- 01 Use Cases hub with 4 product categories, card-based navigation.
- 02 Payments section can initiate with Swift MT103, Pacs.008, and Track a Transfer as distinct cards.
- 03 Foreign Exchange > 'Coming Soon' state. Scope decision documented and designed.
- 04 Event Notifications > webhook subscription flows for Funds Transfer and ACH.
- 05 Consistent dark theme, gradient sphere hero, BNY Treasury & Payment Services nav.

Our APIs enable you to digitally connect to our payment services. Explore here how you can use our APIs for initiation, tracking, notifications, and reconciliation for your Treasury needs.

Three panels illustrating different transfer methods. The first panel, titled 'Initiate a Funds Transfer with Swift MT 103', shows a wire payment with industry standard Swift MT 103 message format. The second panel, titled 'Initiate a Funds Transfer with pacs.008', shows a wire payment with the CPSP's pacs.008 message format. The third panel, titled 'Track a Funds Transfer', shows monitoring the status of a transfer on a near real-time basis, receiving timely updates on processing, approval, and completion stages.

Request and Book an FX Quote

Request an FX quote for a specific currency pair, amount, and value date then accept the quote to book a deal.

Coming Soon

Generate a Funds Transfer Report

Filter your report request based on a variety of selections, including specified time stamps of past transactions, unit, your role in transactions (sender or receiver), and more.

[Learn More](#)

Two dark blue rectangular buttons with white text. The left button is titled "Subscribe to Funds Transfer Notifications" and describes building an API and configuring webhooks. The right button is titled "Subscribe to ACH Notifications" and describes setting rules for ACH payments. Both buttons include a "Learn More" link.

By providing the beneficiary name, account information and dollar amount, the asset manager is able to automate payments via the API through their ERP system to their end clients. The API then submits the transaction to BNY Mellon for Processing.

Contact Us

This API request body contains two required elements: metadata and request.

- requestId → Unique identifier for the request;
- idempotencyKey → For avoidance of duplicate payment submittal;
- signatureAlgorithm → Digital signature algorithm; and
- signature → Digital signature to sign the payload.

```

1  {
2    "metadata": {
3      "requestId": "dbbae877-2895-4f7b-b720-66d0feeca34",
4      "idempotencyKey": "20230707123456",
5      "signatureAlgorithm": "SHA256withRSA",
6      "signature": "1sFcFzXWo25XFRMCShfTcvFY08b2DML1UBVmNam=="
7    }
8  }

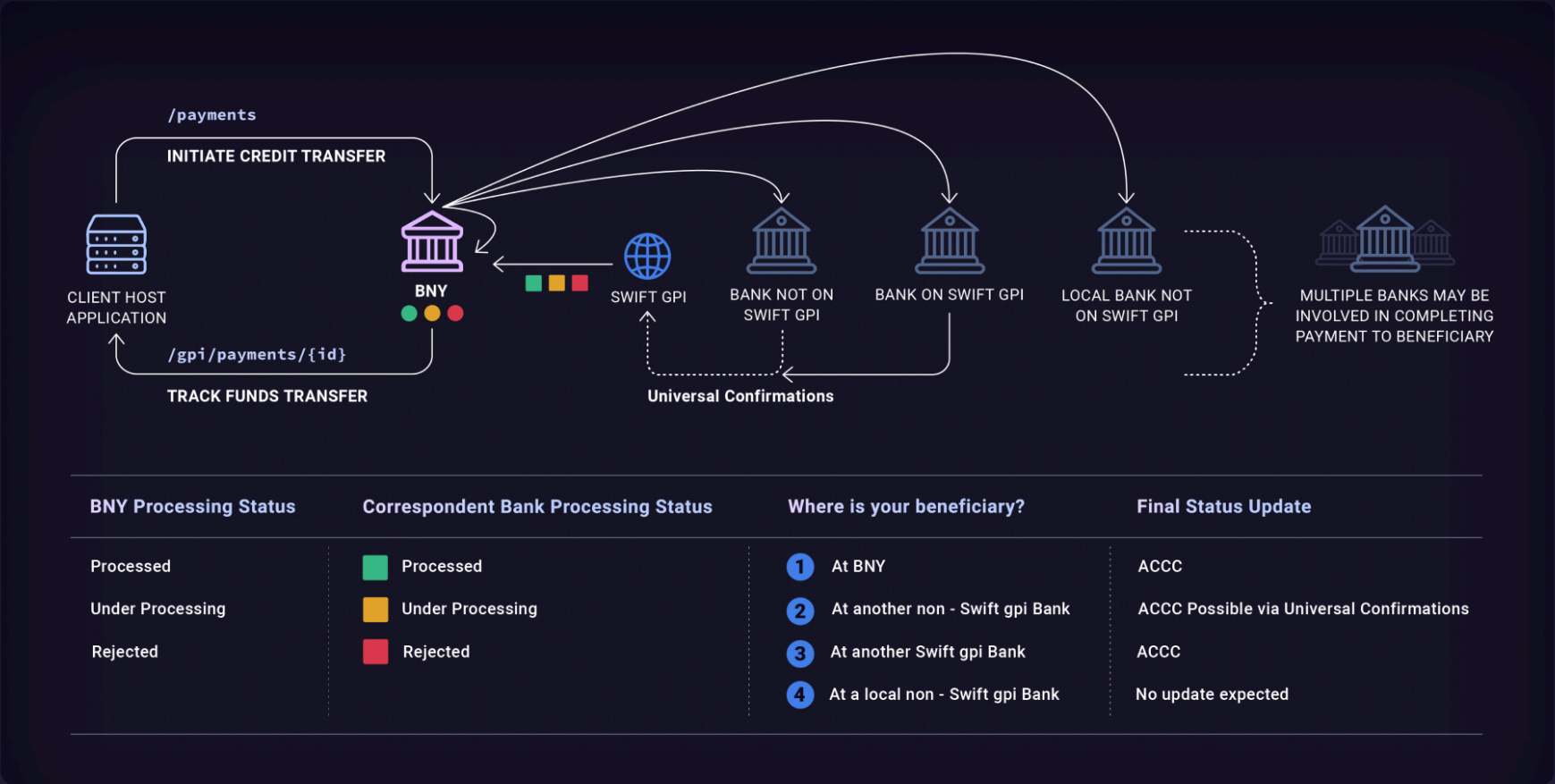
```

- `paymentProduct*` → Payment product used to initiate the payment. In this case, WIRE;
- `paymentMessage*` → Type of payment being initiated. In this case, CREDIT_TRANSFER;
- `messageFormat*` → Format of the message being sent. In this case, Swift MT 103;
- `clientReferenceID` → Client-assigned reference ID to link payment to your system;
- `clientDescription` → Memo field for your reference; and
- `message*` → The Swift MT 103 formatted payment instruction, converted into a JSON string.

```
1 {
2   "request": {
3     "paymentProduct": "WIRE",
4     "paymentMessage": "CREDIT TRANSFER",
5     "clientReferenceId": "49728698-67a2-4bb5-826e-7a4df01527e5",
6     "clientDescription": "Payment for Services",
7     "messageFormat": "SWIFT MT103",
8     "message": "(1:F01IRVTUSNAXX0000182491)(2:0103022414031IRVTUSNAXX000005500671410310224N){3:
9       {121:28191b19-c5ef-44fe-a35c-172cfa997a3e}}(4: 20:UF9CKT53FROE8KTA :23B:CREd :32a:230992USD12,
10      :33B:USD012 :50K:/78787878 NBOKKKWKN :53B:/1111112222 :54A:IRVTUSNAXX :57A:IRVTUSNAXX :59:/90909090
11      BVMV - LONDON BRANCH BNY MELLON CENTRE 160 QUEEN VICTORIA STREET LONDON, EC4V 4LA :70:BAX
12      REFERENCE:BAX00009366 :71A:OUR -)"
13   }
14 }
```

Complex Content. Clear Experience.

How it Works



```

Overview
Application Header
Group Header
Credit Transfer
Transaction Information

```

The pacs.008 message is a highly structured XML file that includes detailed information about the payment, including at a high level the following:

- Debtor Information: Details about the entity initiating the payment.
- Creditor Information: Details about the entity receiving the payment.
- Transaction Amount: The amount being transferred.
- Currency: The currency in which the payment is made.
- Payment Identification: Unique identifiers for the payment to ensure traceability.
- Remittance Information: Additional details that help the recipient understand the purpose of the payment.

The pacs.008 message is composed of several main components with various sub-elements within them:

- [illegible]

Watch the video for an overview on using TreasuryEdge for setting rules and subscribing. For a high-level overview and comprehensive details, it is recommended to do the following:



- Get a user ID with entitlements from your company's security administrator and log-in to TreasuryEdge.
- Find the ["Resources"](#) tab.
- Click ["Alerts and Notifications"](#).
- Go to the ["Rules"](#) tab and click ["Create Rule"](#).
- Input the title and description of your rule.

You now have the option to select the criteria or conditions for your notifications. After choosing "Wires" from the dropdown, select from the list below:

- Status
- Account
- Role in Transaction

See the table below for more information on these field values in TreasuryEdge including Rule Condition, Comparison, and Selection Options.

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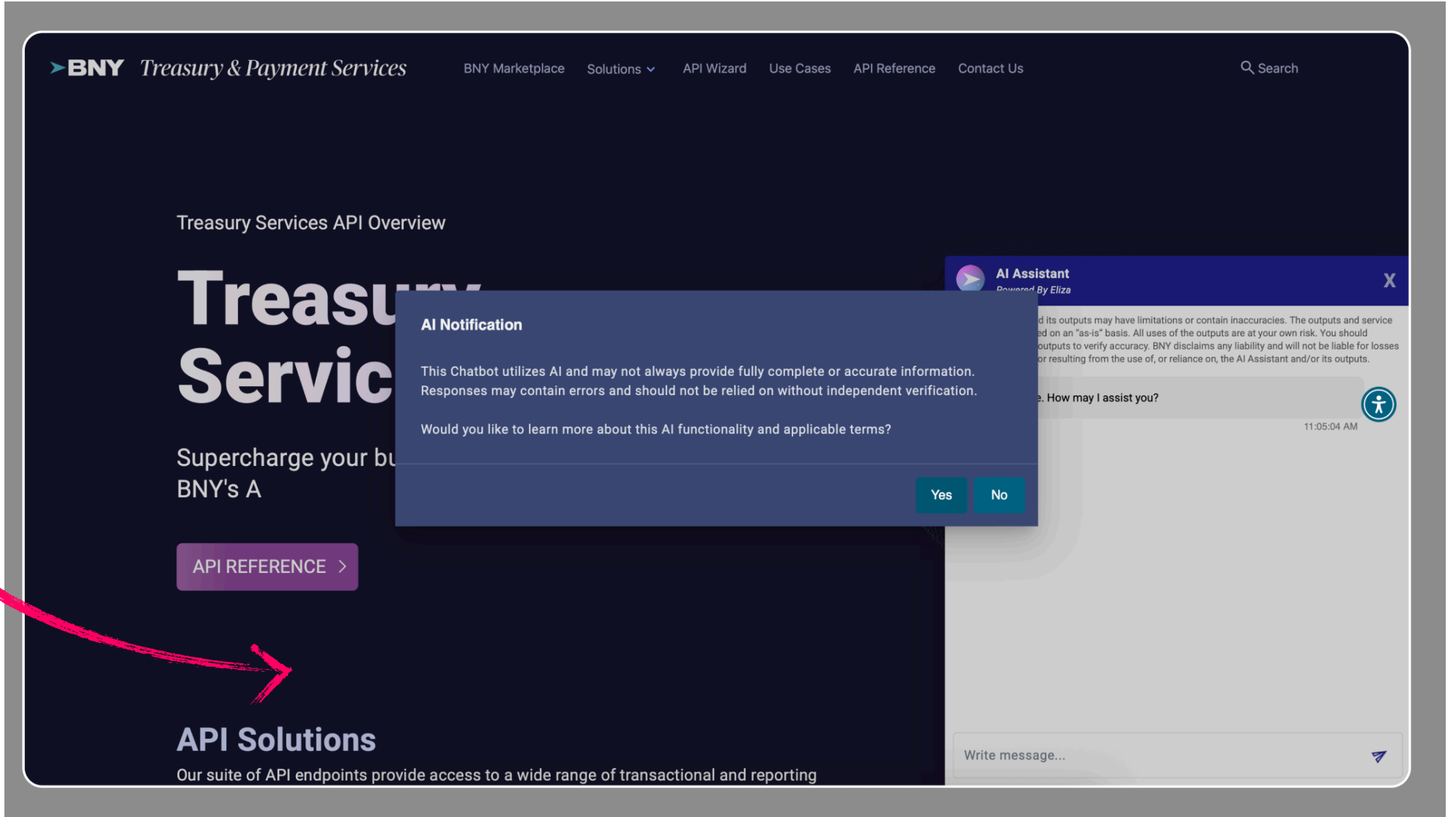
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Repositioned from dark theme to white space minimal design aesthetic

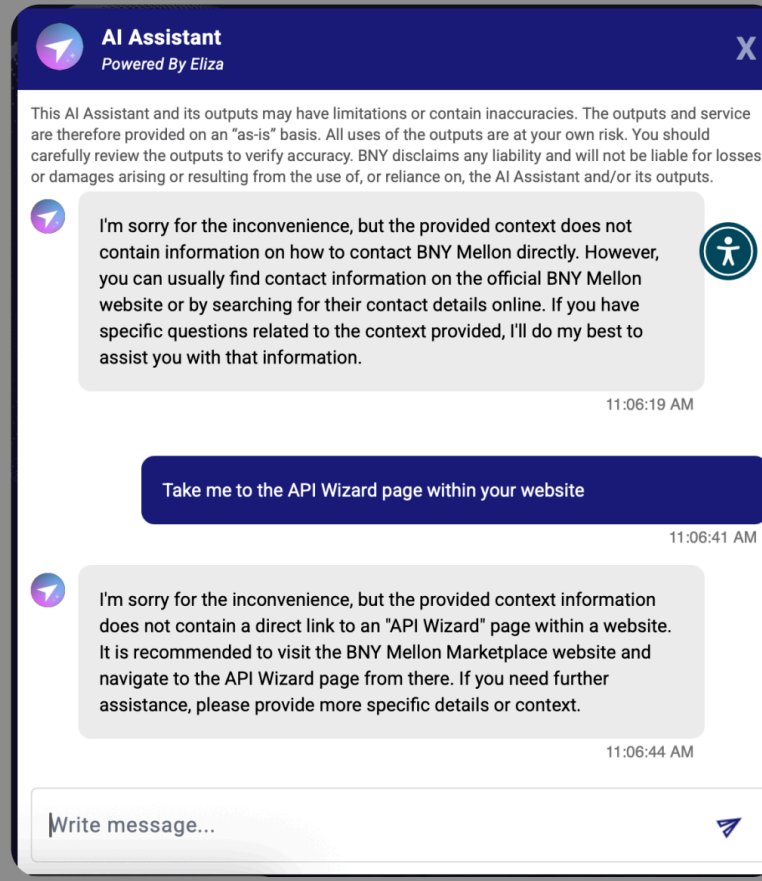
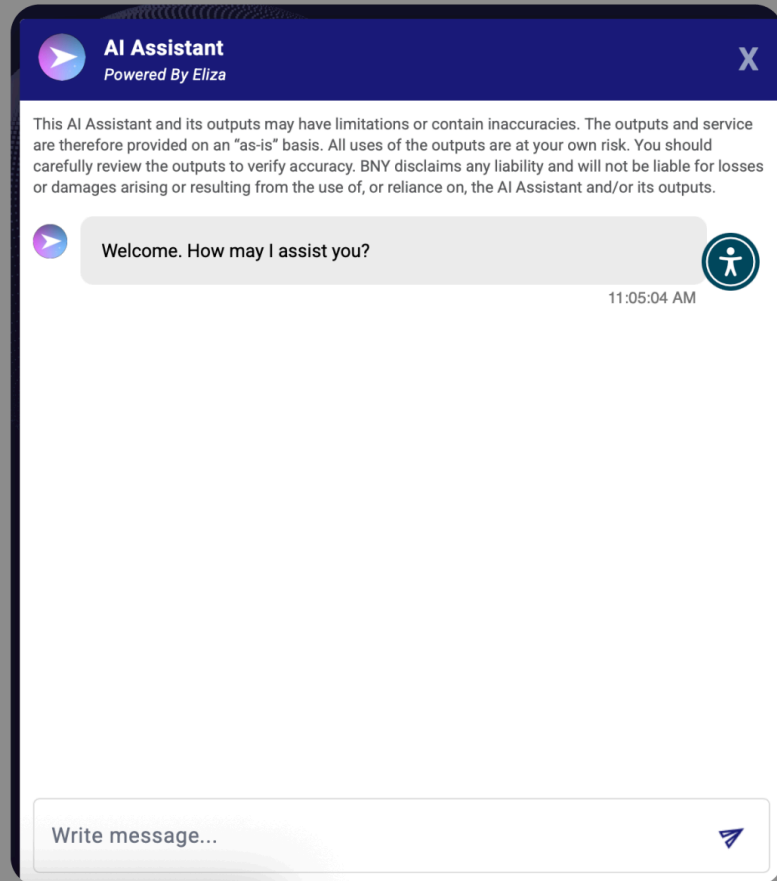
2 phases. 1 complete product ecosystem.

Eliza // BNY's AI Chatbot would live inside the platform I had already built.



The existing chatbot was a compliance risk.

Existing AI Assistant Pain Point



At a consumer level, this is a UX problem.

At a regulated bank, this is a **Legal Liability**.



Every design decision for Eliza ran through this filter first.

The Pain Points

Hallucinations

Unverified + vague answers in a regulated banking context. No source citation. Users acted on wrong information.

Silent failure

Out-of-scope queries returned nothing or generic errors. No fallback path. Users were left stranded.

No chat history

No audit trail > thus the legal and compliance teams were unable to monitor or review conversations.

No recurring session memory

Every conversation started cold. Users repeated context every time they opened the chat.

Agile JIRA approach to every UX problem

JIRA Acceptance Criteria

As an end user, I need to expand the Eliza-Chat window into a larger one, so that I can view complex or long responses that would otherwise fill the smaller Rich Text Area window.

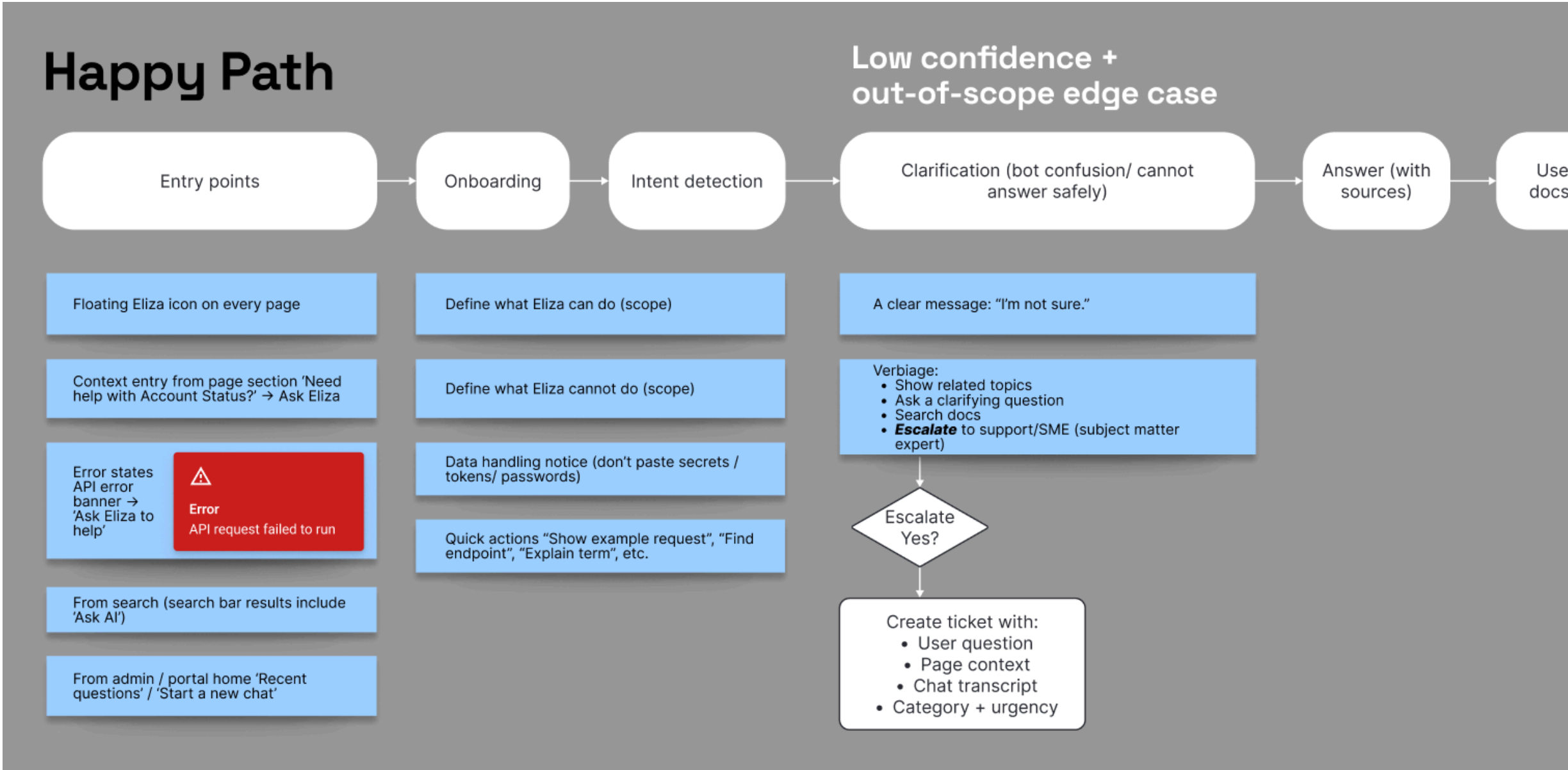
As an end user, I need to click a button to copy Eliza's responses from the chat window, regardless of the chat window's size, so that I can put the responses to use immediately.

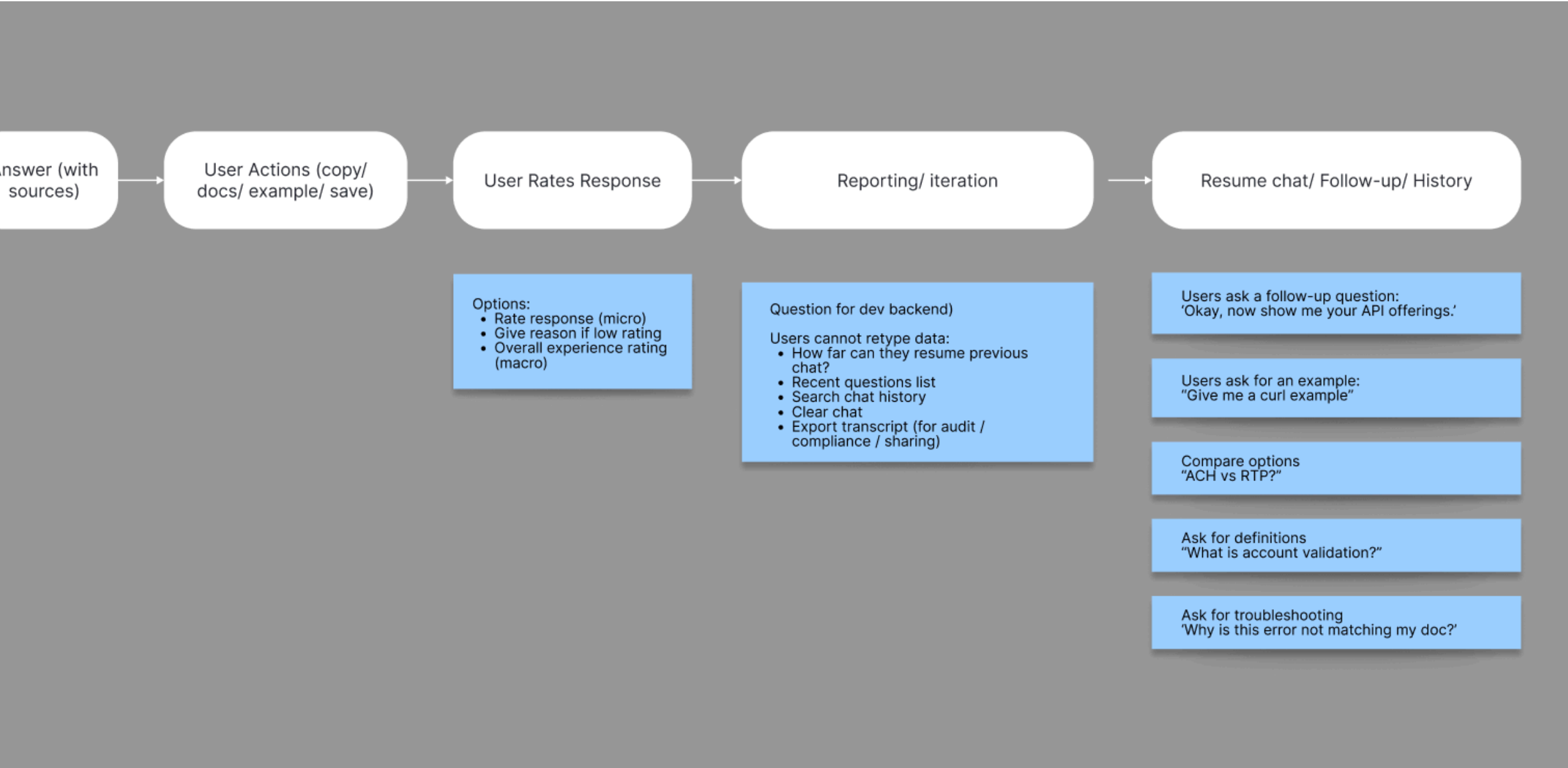
Acceptance criteria:

1. Resize button is visible in blue AI Assistant banner regardless of expansion state
2. When the AI Assistant window is in expanded state, resize icon should be highlighted / visually in "on" state
3. The copy and rate experience is hidden by default and activated in a visually appealing way

Requirements as discussed with Jackson & Nicholas for the Eliza chatbot on the TE microsite website (<https://marketplace.test.bnymellon.com/treasury/api-library/reconciliation>):

1. Expand + copy icon beside the close button on chatbot to make the UI interactive
2. Match color palette and UI style to existing microsite screens and add border radius to corners in design
3. Add star rating feature with sub-text (dissatisfied, neutral, satisfied) options for user feedback on hover state of each response
4. Design for holistic 'How was your overall experience' user response after session inactivity over 2 minutes
5. Brainstorm the walkthrough for the star-rating user journey for first time users





SOLVED FOR...

→ **Compliance-first answers**

Every response linked a cited BNY source document.

→ **Confidence threshold**

No more silent failure > low-confidence intent triggers **3** fallback paths; ***clarification, escalation or human handoff.***

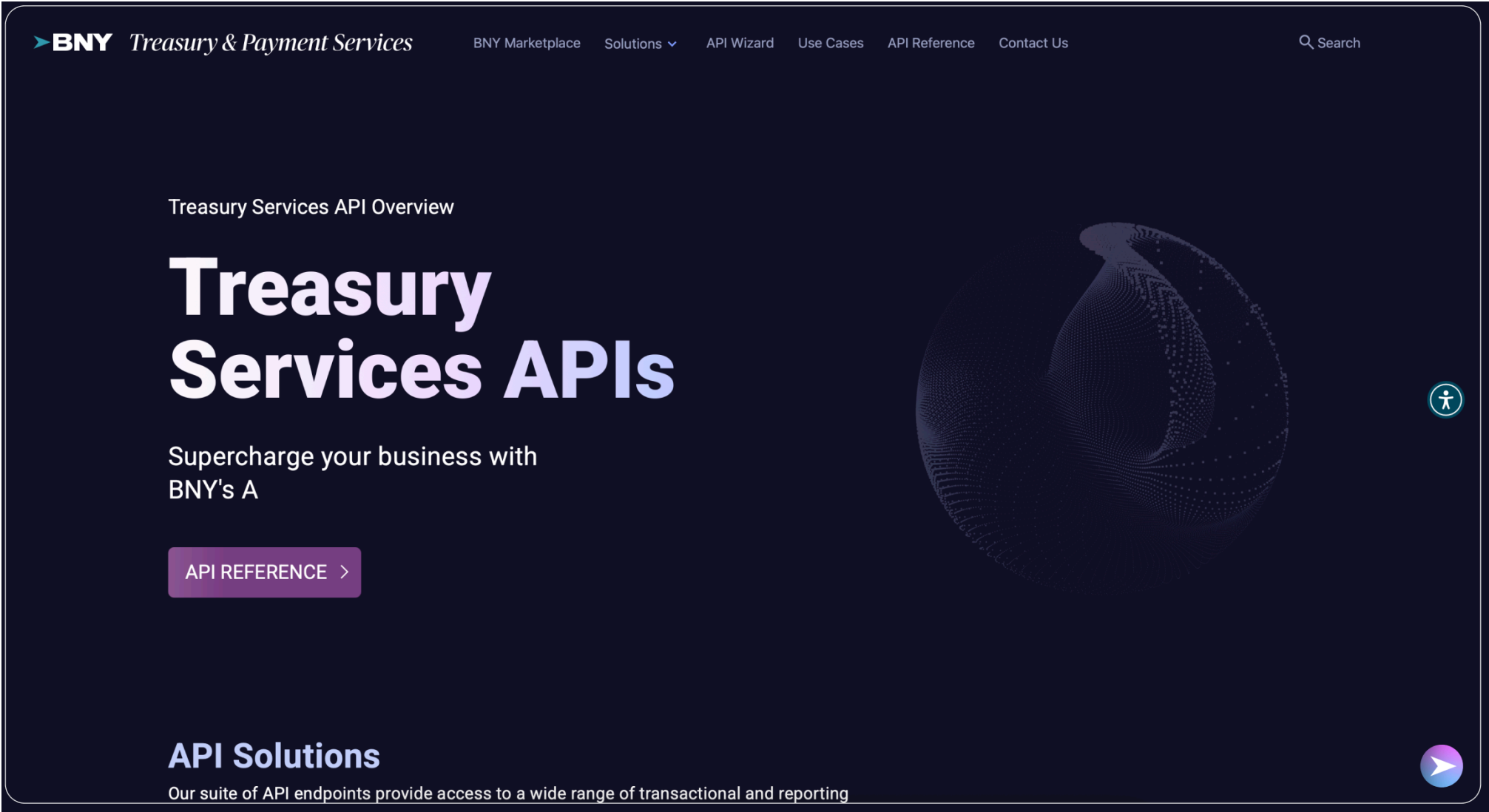
→ **Persistent chat history**

The chatbot saves previous conversations so users can continue chats across the portal and ask follow-up questions without repeating information.

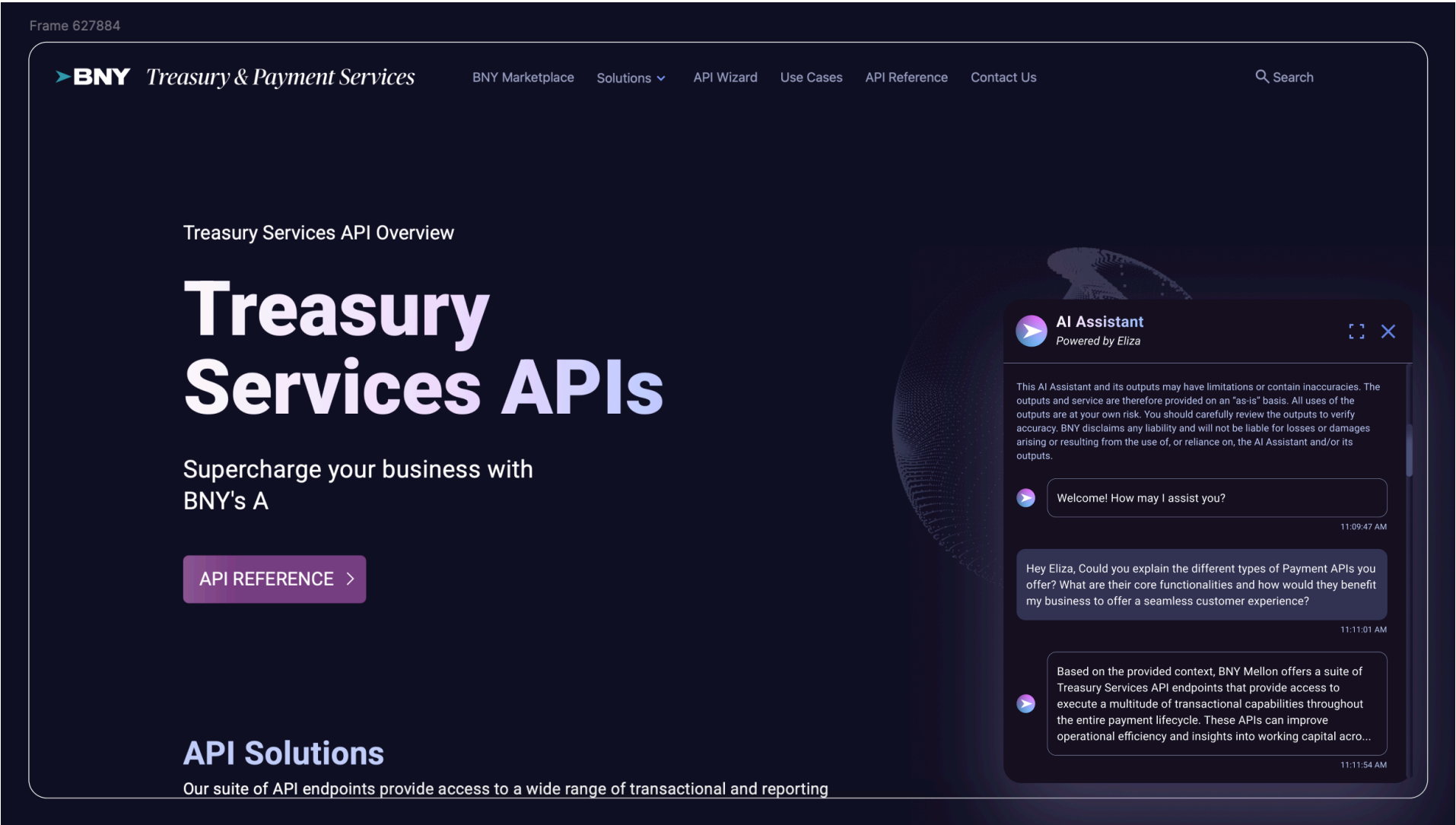
→ **Failure state use cases**

System down, slow response, conflicting sources; all thought about explicitly with team.

Eliza on the platform I built.



Eliza on the platform I built.



Floating entry point

FAB icon on every page

Chat overlay

Source-cited responses

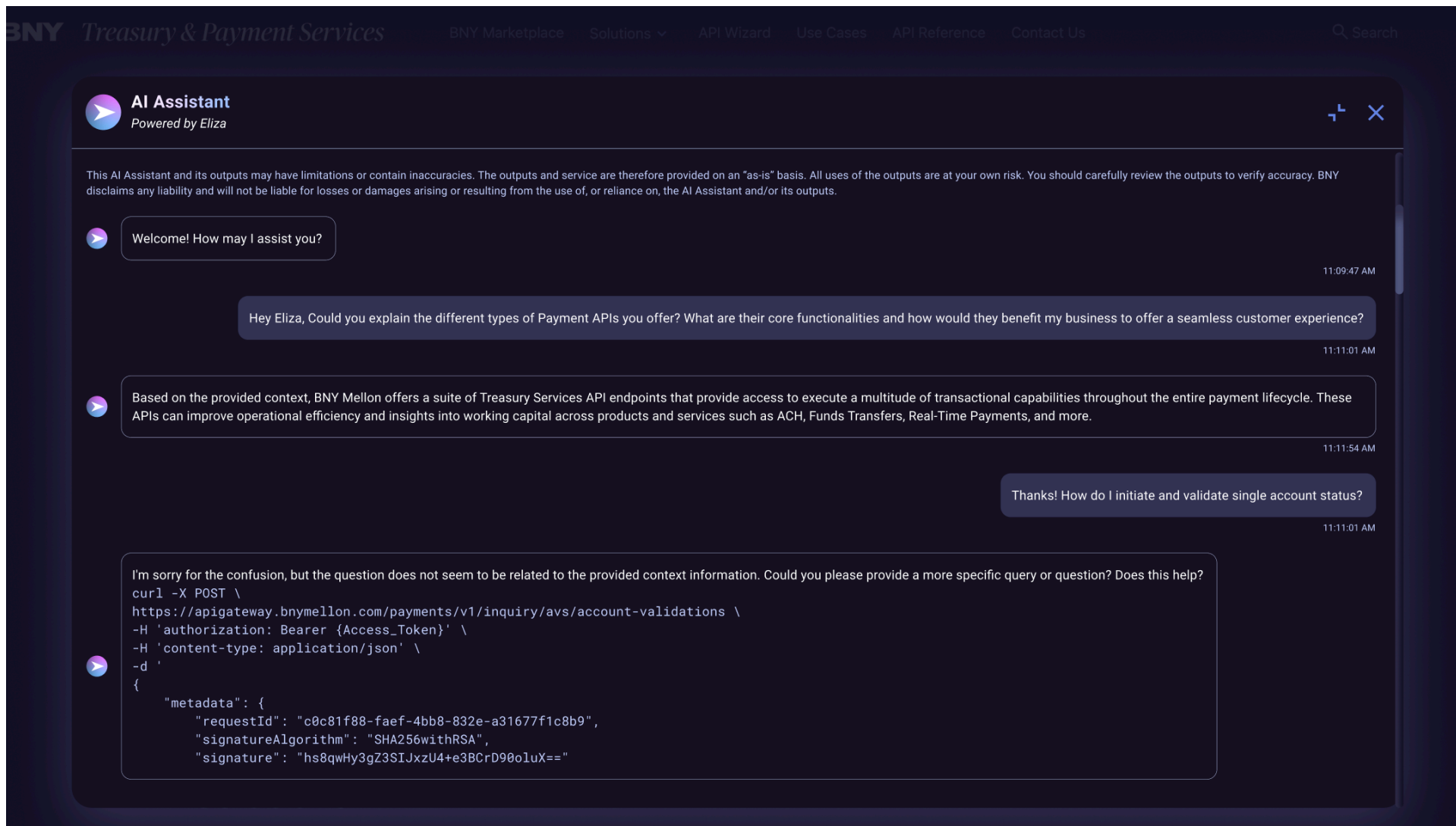
Feedback states

Star ratings + follow-up loop

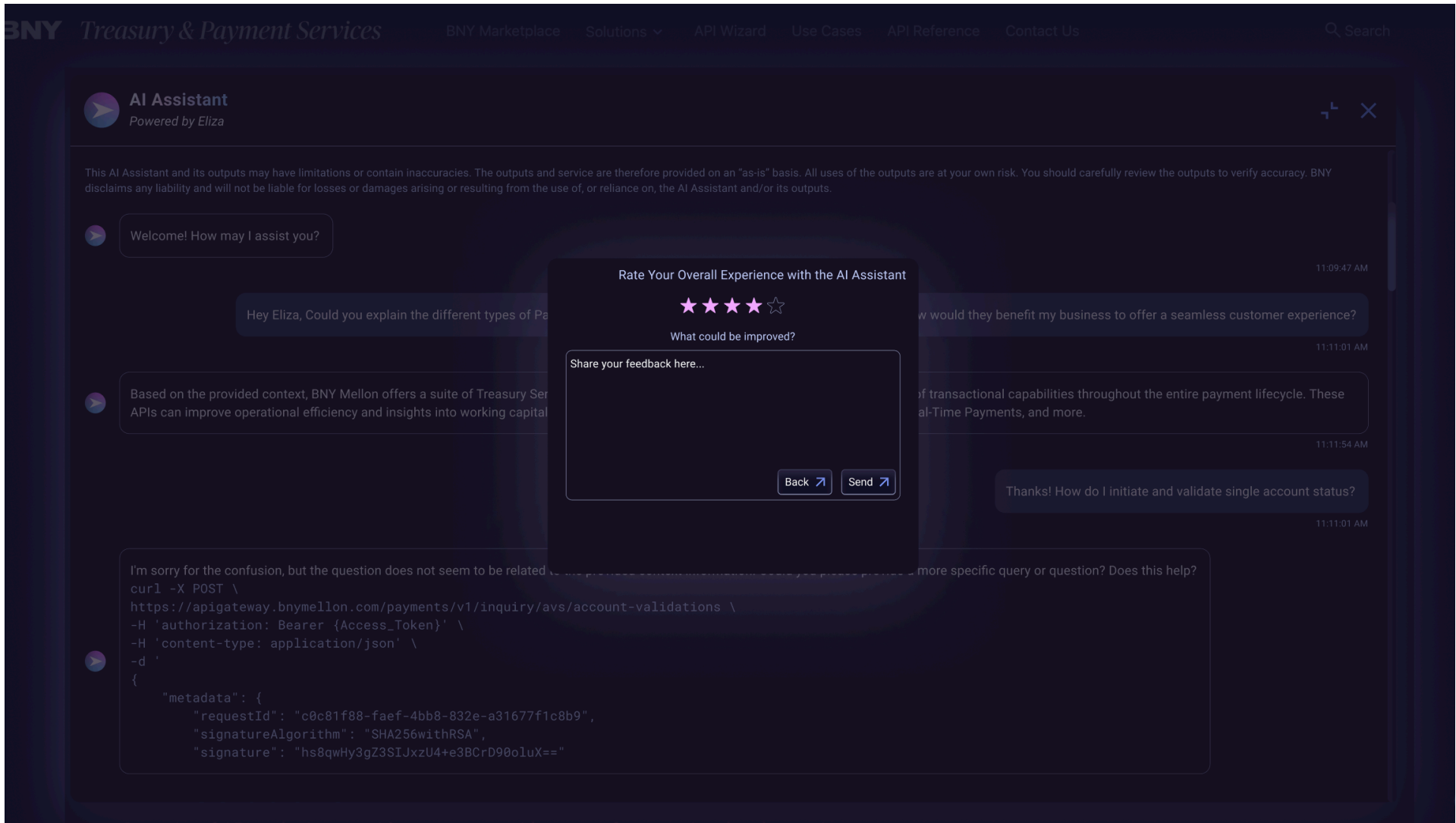
Error handling

Graceful 3-path fallback

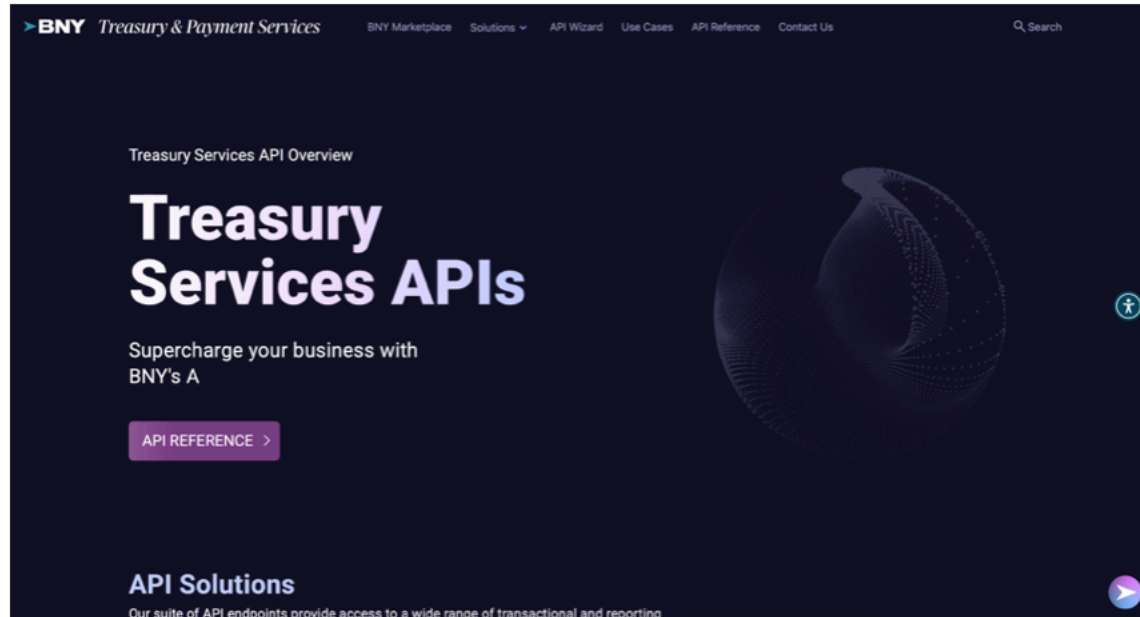
Eliza on the platform I built.



Eliza on the platform I built.

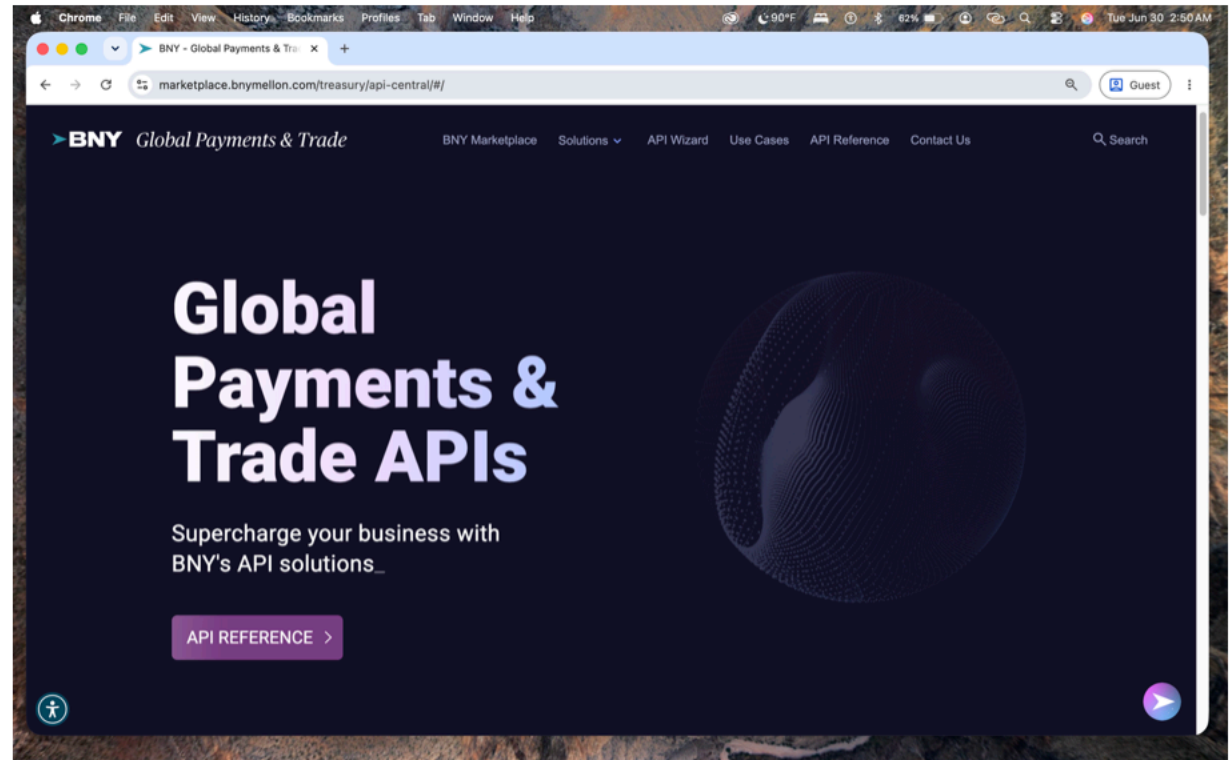


Present Day Eliza on the platform I built.



Treasury services API now renamed to Global payments and trade APIs

The site I built is now one of Eliza's entry points



I proposed a repositioning. Not a widget. A product.



I proposed a repositioning. Not a widget. A product.



Start chatting with Eliza to gather more insights.
Start a conversation!

Start typing here...

Hey Eliza!

I'd like to see my Overdue Payment Analytics

Lorem ipsum dolor

Send

I proposed a repositioning. Not a widget. A product.

WHAT CHANGED...

- was: **Dark overlay widget**
Now: White standalone product page
- was: **Generic 'AI Assistant'**
Now: BNY Eliza; branded identity
- was: **Only Support tool**
Now: 'Insights Your Way'; analytics positioning on landing
- was: **Dark navy palette**
Clean white, aligned with new Kernel Design System
- was: **Only Utility Chatbot**
Added data visualization + conversation

What this work was built to deliver.

0 to1

Website built from scratch

Word doc to live product

2x

Design systems contribution

Treasury Edge + Kernel
contribution

↓60%

Estimated search time

Helped in UX heat
maps & user testing

100%

Source-cited responses

compliance requirement met

GAPS BRIDGED BY DESIGN

Content clarity

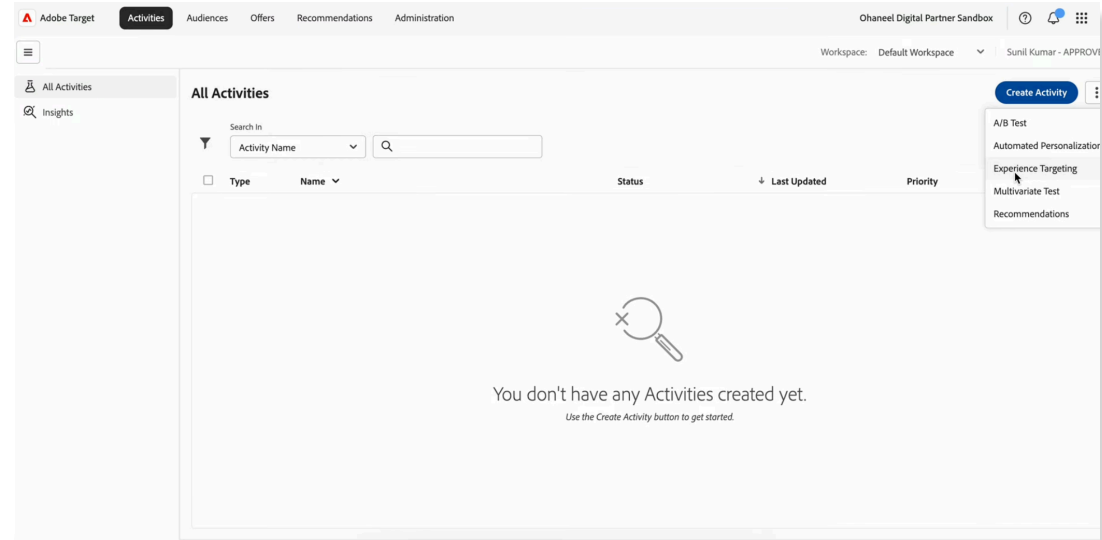
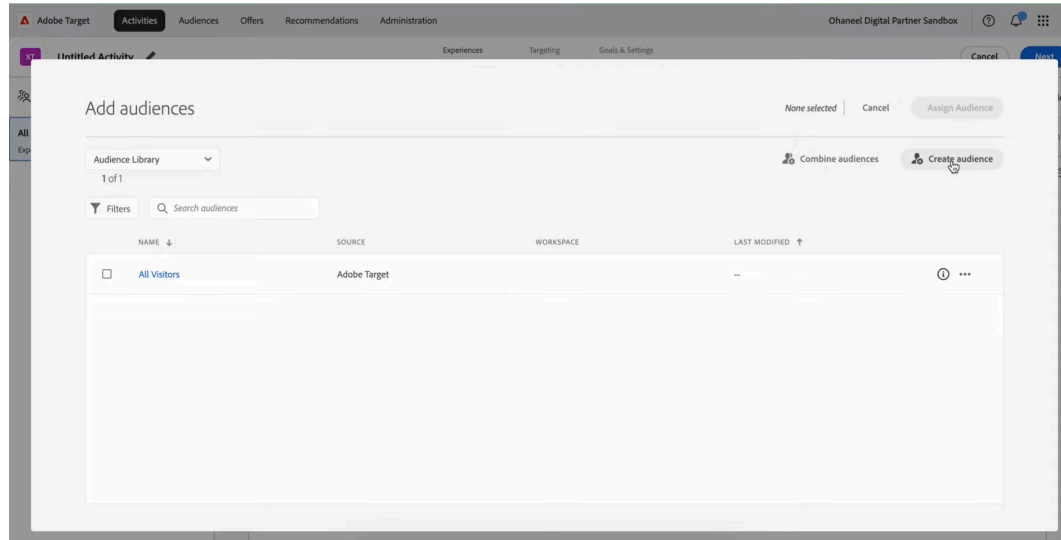
Compliance risk

Design system uniformity

B2B & B2C developer self-service

What I'd do differently

- Define KPIs before the first wireframe
- Formalise decision gates from day one
- Track fallback rate, task success, session length & A/B test via Adobe Target.
- Personalize experience in session continuity: *'Welcome back, John, resuming from your ACH Wire Transfer query.'*
- Assess conversation logs with team, flag-for-audit, weekly digest; full backend UX for legal team.



Thank You 😊