

FTSE
Russell

lseg.com +
customer service portal
vision + concepts

tcs
john kwoka



indexes

- Equity >
- Infrastructure >
- Factors >
- Index >
- Resources >
- Alternatively Weighted >
- Fixed Income >
- Real Estate >
- Sustainable >



analytics

FTSE Russell provides an advanced suite of risk, portfolio, and Index analytics.

Yield Book

Yield Book provides buy- and side clients with an authoritative source of sophisticated fixed income ...

more

Refinitiv

Refinitiv analytics are focused on generating and delivering superior value-add ...

more



research

Description with link to demo or video



data

Description with link to demo or video



events

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blog

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“at a glance”
“above the fold”
architecture
future proof/ scale
intangibles



research

define goals + pain points

user interviews questions

finalize LSEG strategy

design

lo-fi design

review lo-fi

iterate lo-fi

lo-fi sign off

dev. team integration

hi-fidelity mockups

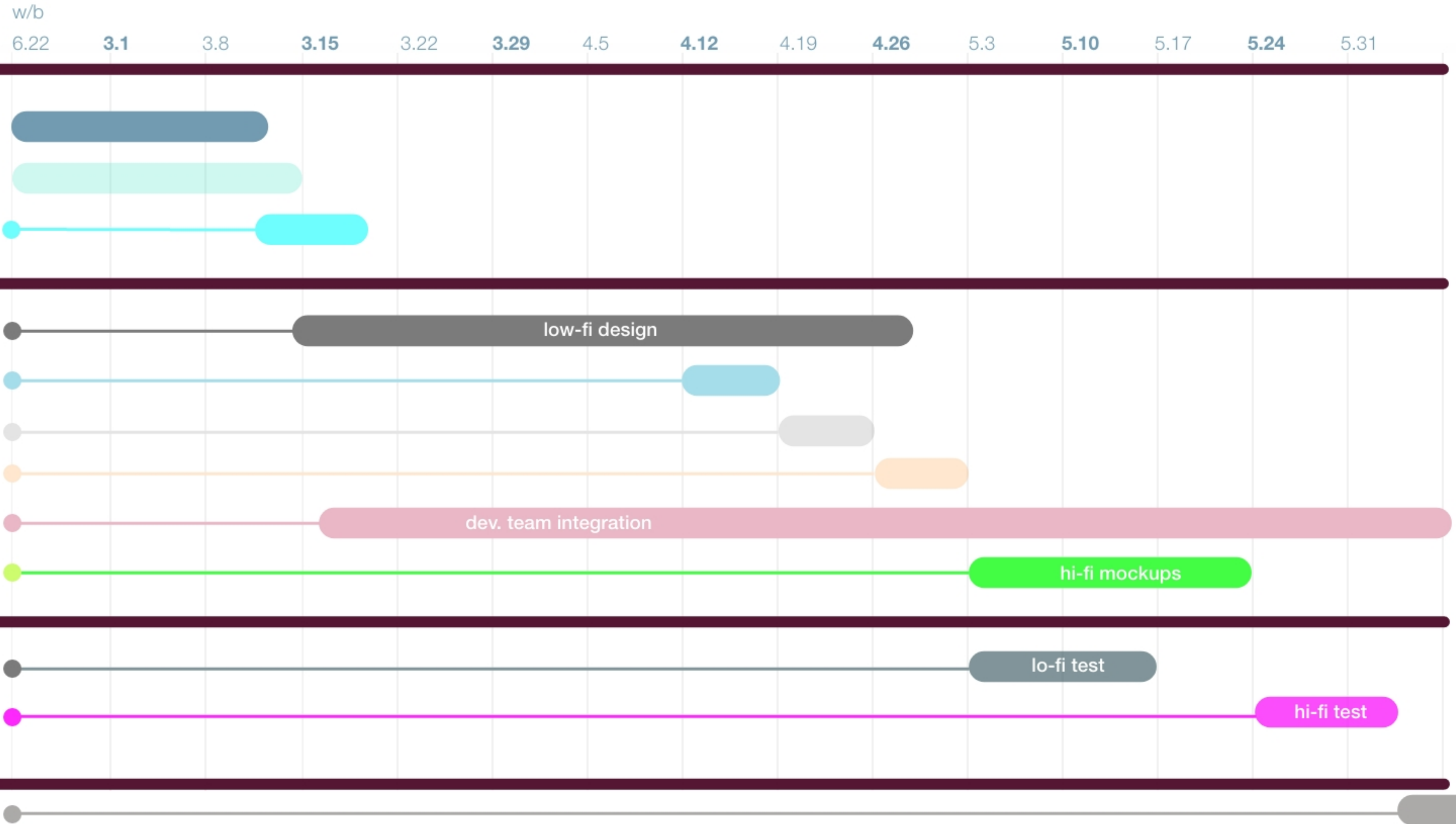
testing

test lo-fi

test hi-fi

deliver

final prototype



chapter 1: architecture audit

To evolve the London Stock Exchange (LSE) internal B2B dashboard for future-proofing and scalability, I approached the project with a strategic focus on user experience, flexibility, and technological advancement. Here's how I tackled the challenge:

1. User-Centric Redesign

Comprehensive User Research: Begin with in-depth interviews and surveys with primary users, such as financial analysts, traders, and internal stakeholders, to understand their pain points, needs, and expectations. Task analysis and persona creation would help in aligning the dashboard's functionalities with user workflows.

Optimized Information Architecture: Redesign the dashboard to prioritize clarity and accessibility. Implement an intuitive navigation structure, ensuring that essential data is easily accessible and that complex information is presented in a digestible format.

2. Scalable Design System

Modular Component Library: Develop a design system with modular components that can be easily reused and scaled. This would include creating UI kits and style guides that ensure consistency while allowing for future enhancements.

Responsive and Adaptive Design: Ensure the dashboard is fully responsive, adapting to different screen sizes and devices. Implement an adaptive design approach to tailor the experience based on user roles and preferences.

3. Advanced Data Visualization

Dynamic and Interactive Visuals: Incorporate dynamic data visualizations that allow users to interact with the data in real time, such as customizable graphs, charts, and heatmaps. This would enable users to drill down into specific data points or trends without overwhelming them.

Predictive Analytics Integration: Integrate AI-driven predictive analytics to provide insights and forecasts based on historical data. This would empower users to make informed decisions and anticipate market movements.

4. Enhanced Performance and Scalability

Cloud-Based Infrastructure: Migrate the dashboard to a cloud-based infrastructure to improve performance, scalability, and accessibility. This approach would support large-scale data processing and allow for seamless updates without disrupting user experience.

Microservices Architecture: Implement a microservices architecture to decouple different functionalities. This allows for independent scaling of services and facilitates the integration of new features as the dashboard evolves.

5. Future-Proofing Through Flexibility + A Fresh UI Design

APIs and Third-Party Integrations: Design the dashboard with robust API integrations, enabling seamless connections with other financial tools and platforms. This would ensure that the dashboard remains adaptable to new technologies and market demands.

Continuous Feedback Loop: Establish a continuous feedback loop with users to monitor the dashboard's effectiveness and gather insights for ongoing improvements. Regular updates and iterative enhancements would keep the dashboard aligned with evolving user needs.

6. Security and Compliance

Robust Security Measures: Implement advanced security protocols, including encryption, multi-factor authentication, and regular security audits, to protect sensitive financial data.

Compliance with Regulatory Standards: Ensure the dashboard adheres to the latest financial regulations and industry standards, making it a trusted tool for users in a highly regulated environment.

7. Training and Onboarding

User Onboarding and Training: Develop comprehensive onboarding and training programs to help users familiarize themselves with new features and functionalities. This could include in-app tutorials, webinars, and documentation. By focusing on these areas, the LSE B2B dashboard would not only meet the current needs of its users but also be well-positioned to adapt to future trends and challenges in the financial sector. This approach would elevate its scalability, ensuring it remains a valuable tool for users over the long term.



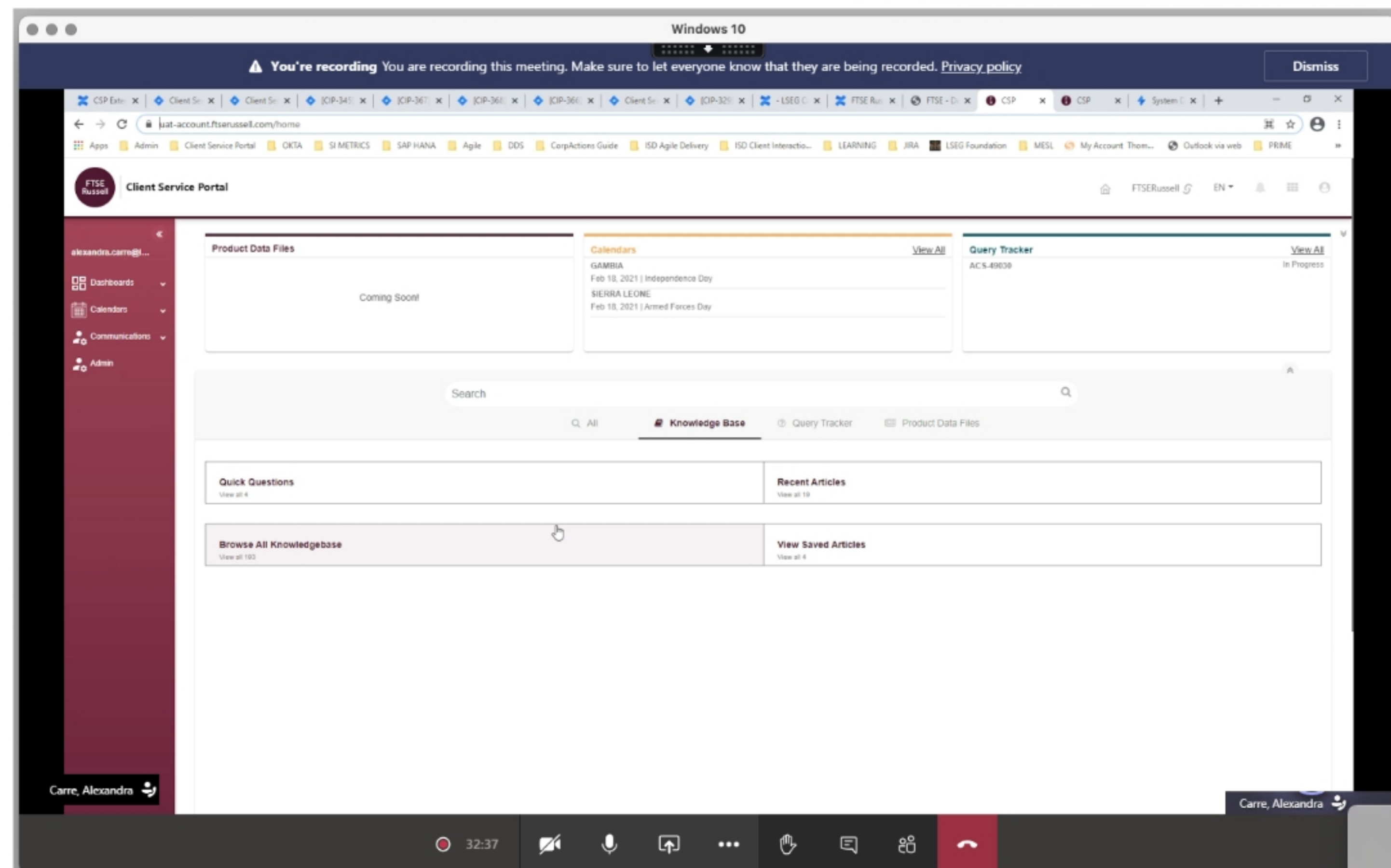
chapter 1:
architecture audit

“at a glance”
“above the fold”
reduce cognitive load

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chapter 1: architecture audit

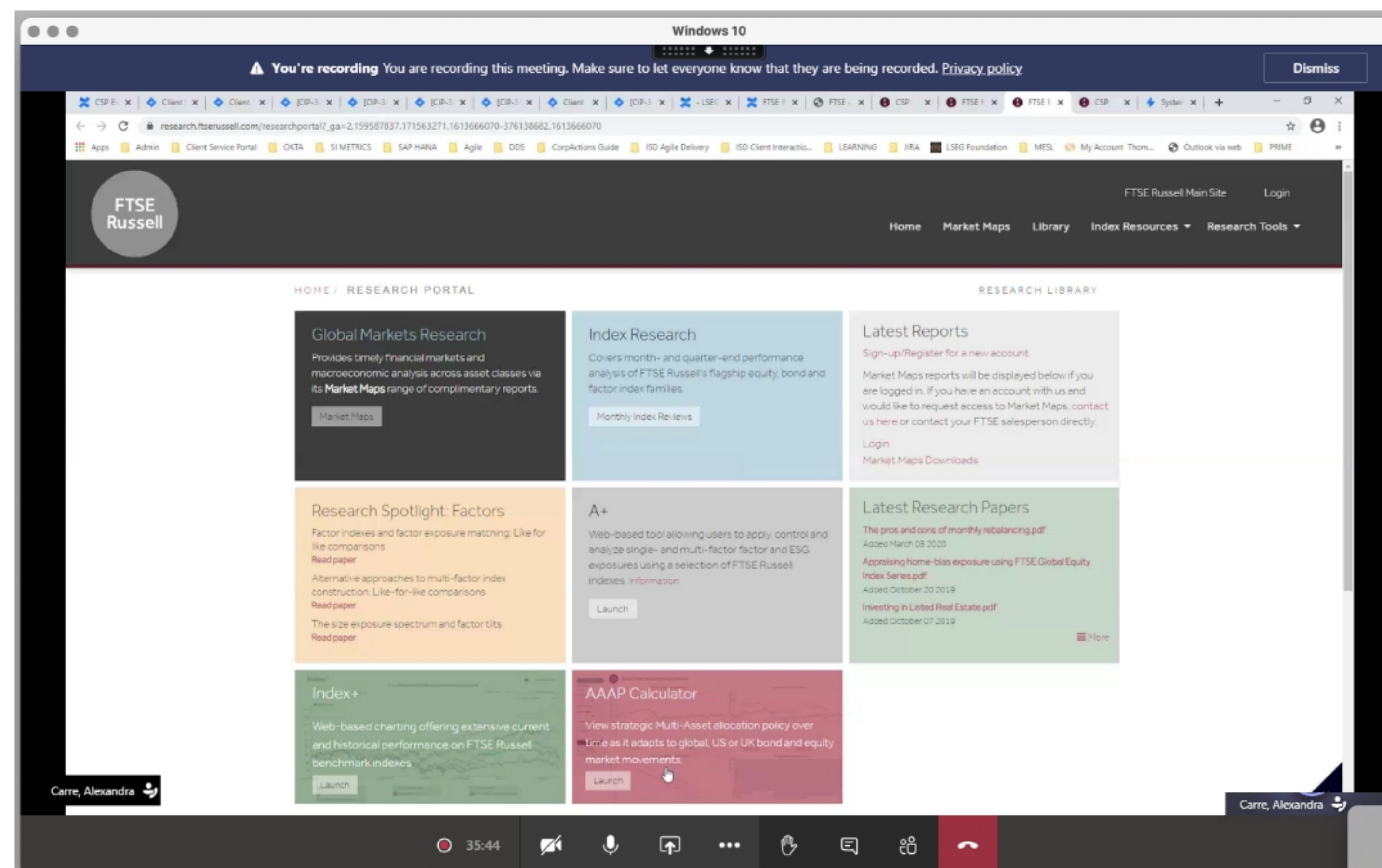
before



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chapter 1: architecture audit

before



CSP Design Audit

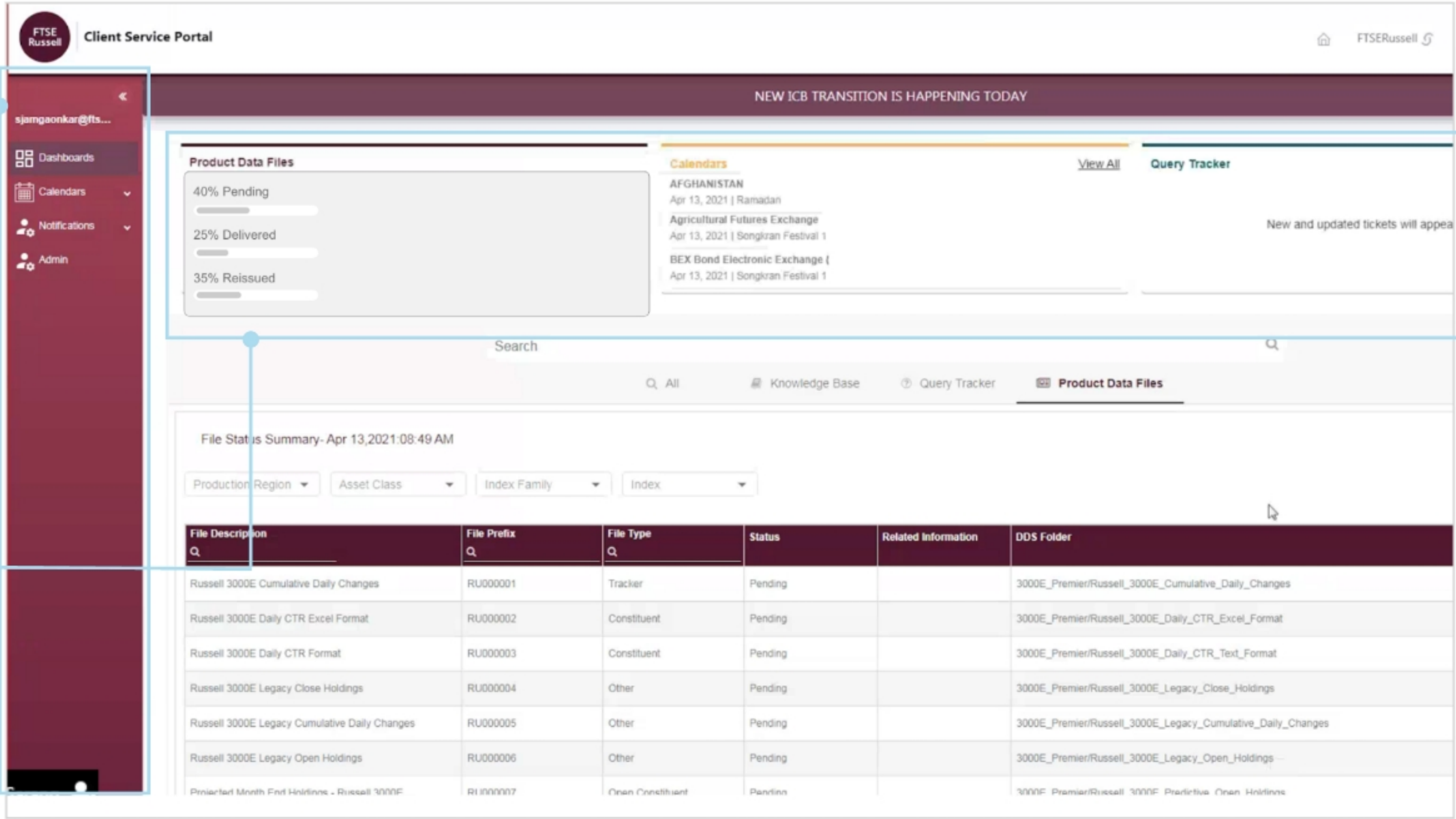
Main Menu Panel

All styling in Menu Panel needed to be adjusted. Best Practices dictates left menu bar navigation width should fill approximately 20-40% of the screen. This nav bar is under 10%.

Also, text size could be increased and padding around icons and dropdown carats should be greater.

Widget Panel

Migrating all widgets to this area will force users to scroll more, and is quickly running out of real estate on the page,



Control Tower | Panel

At-A-Glance module. Adds additional functionality for content. Helps users navigate and perform tasks more efficiently.

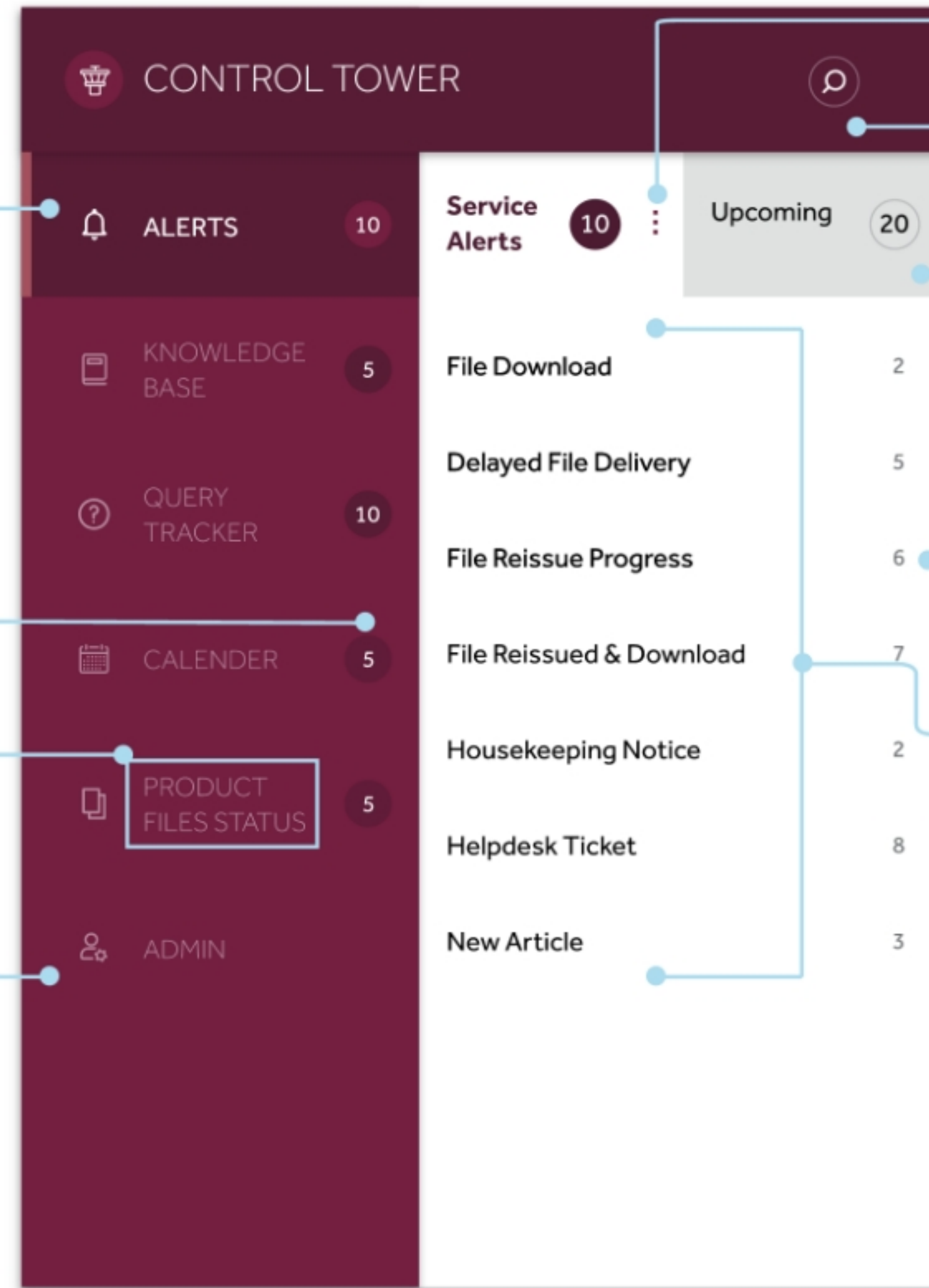
Main Menu Panel

Expanded View. Plenty of room at the bottom to scale and add additional categories.

Notifications

All Caps In Main Menu

Adds a boldness, balances the weight of the design, and strengthens hierarchy in Control Tower.



More; Add Functionality

Expand/ Collapse

Search

Tab

Additional Sub-Categories

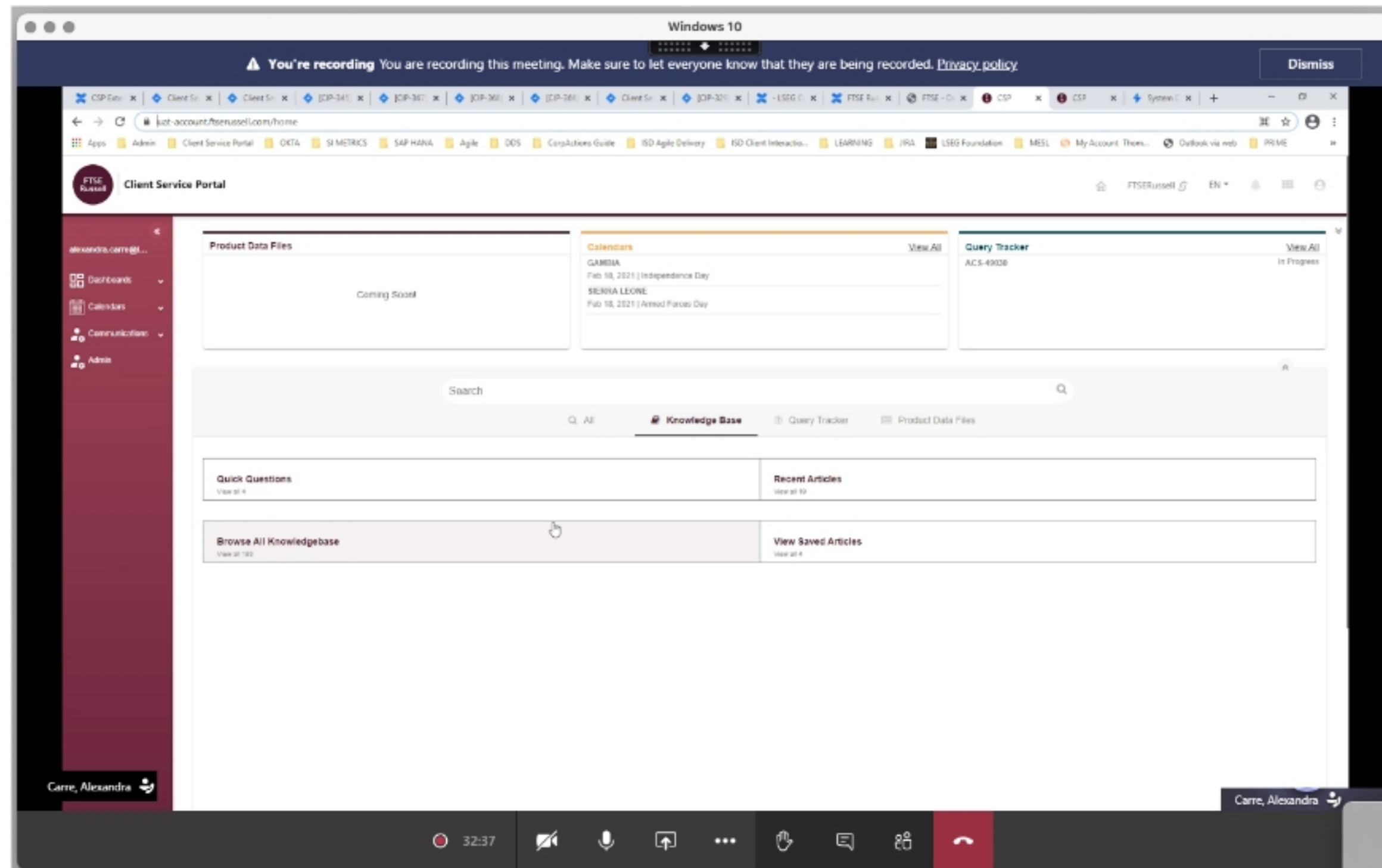
Alert Count

High level view of number of alerts.

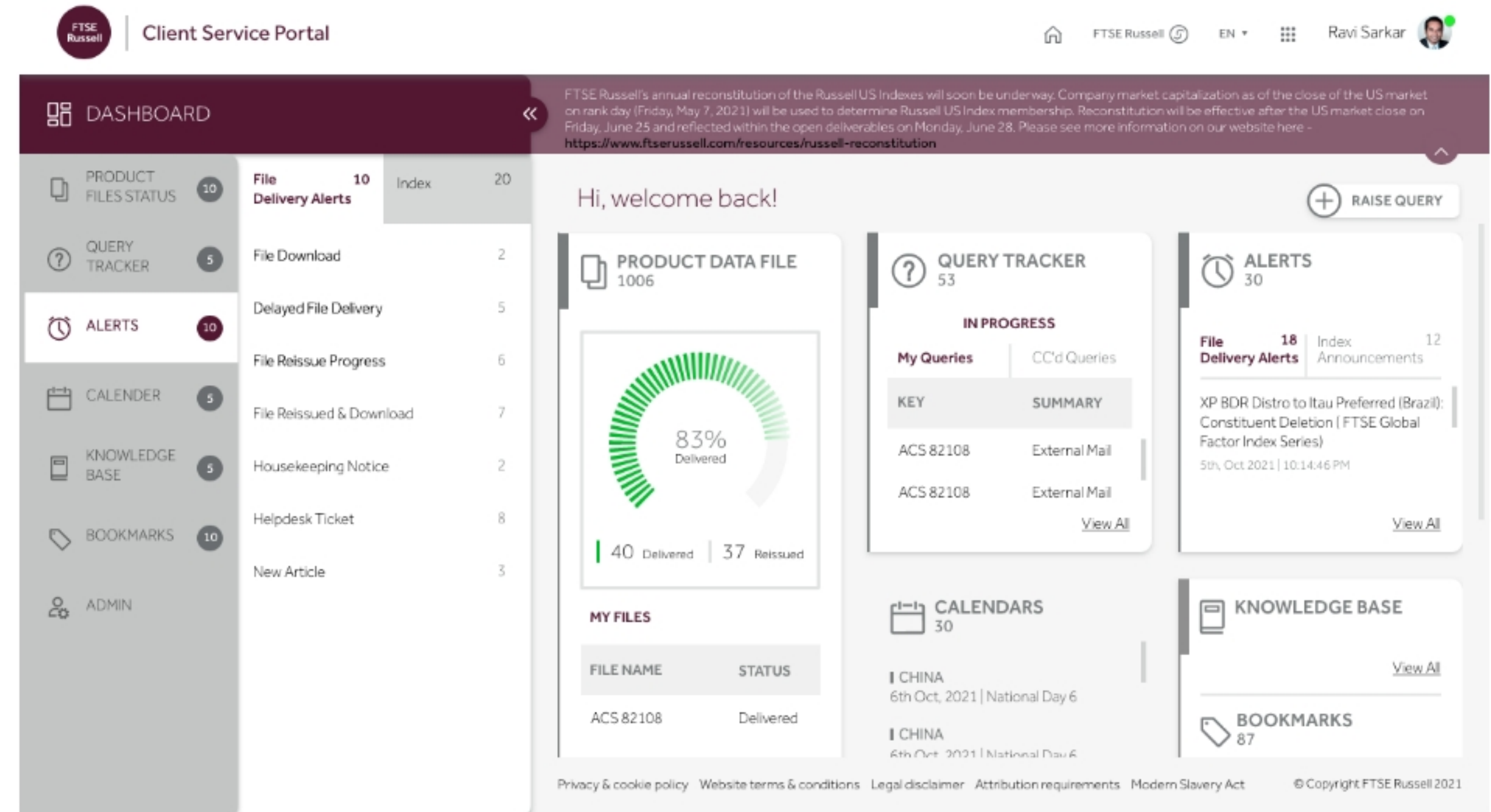
Submenu Panel

Allows a thumbnail view/ preview of child categories. Clicking on one of the items expands content to the center module on the right, providing a more detailed view of tables, columns and deeper content, while allowing a quick return to all other choices.

before



after



after

FTSE Russell

Client Service Portal

Home

FTSE Russell

EN

Ravi Sarkar

DASHBOARD

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FTSE Russell's annual reconstitution of the Russell US Indexes will soon be underway. Company market capitalization as of the close of the US market on rank day (Friday, May 7, 2021) will be used to determine Russell US Index membership. Reconstitution will be effective after the US market close on Friday, June 25 and reflected within the open deliverables on Monday, June 28. Please see more information on our website here - <https://www.ftserussell.com/resources/russell-reconstitution>

Hi, welcome back!

PRODUCT DATA FILE 1006

83% Delivered

40 Delivered | 37 Reissued

MY FILES

FILE NAME	STATUS
ACS 82108	Delivered

QUERY TRACKER 53

IN PROGRESS

My Queries

CC'd Queries

KEY	SUMMARY
ACS 82108	External Mail
ACS 82108	External Mail

View All

CALENDARS 30

CHINA 6th Oct, 2021 | National Day 6

CHINA 6th Oct, 2021 | National Day 6

ALERTS 30

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XP BDR Distro to Itau Preferred (Brazil): Constituent Deletion (FTSE Global Factor Index Series)

5th, Oct 2021 | 10:14:46 PM

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KNOWLEDGE BASE

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after



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Hi, welcome back!

[+ RAISE QUERY](#)



PRODUCT DATA FILE 1006

Overall FTSE Russell Delivery Status

1663 | Delivered

Note: Resets at 0.00 UTC

My Files

FILE NAME	STATUS
ACS 82108	Delivered
ACS 82108	Delivered
ACS 82108	Delivered

[View All](#)

QUERY TRACKER 53

IN PROGRESS

My Queries | CC'd Queries

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chapter 2: future proof/ scalability

focus on a user-centric redesign with a modular system, dynamic visualizations, and cloud-based infrastructure. this approach ensures adaptability, seamless updates, and strong security, while continuous user feedback keeps the dashboard aligned with evolving needs.

explored concepts of indexes as organic living flowing energies. backgrounds could be gifs or animated,. and they're ever-changing like the markets themselves. their state of being always in flux. these backgrounds harkin to ftse russell's symbols, they are in a 3-d state of softnessand hardness...

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chapter 2: future proof/ scalability



analytics

Please try out the test data available either via Anaconda or through ML Studio.

Test notebook and code notebooks with a 1-click download.

use case one

data link
code link

use case one

data link
code link

use case one

data link
code link



indexes

...the graphic representation of information and data. By using visual elements like charts, graphs, and maps, data visualization tools provide an accessible way to see and understand trends, outliers, and patterns in data.

Explore

questions?

contact our team with your questions or request a demo.

contact us



research

Description with link to demo



blog

Description with link to demo



blog

Description with link to demo



blog

Description with link to demo

Summary

Notifications

Query Tracker

Knowledge Base

Notifications

18 BAM! UK index Indicative Review Membership Changes Quarterly Review March 2021
23-Feb-2021

Alerts

03 BAM! UK index Indicative Review Membership Changes Quarterly Review March 2021

Upcoming Changes

18 BAM! UK index Indicative Review Membership Changes Quarterly Review March 2021

Overview

31%
Of Target

31%
Of Target



research

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blog

Description with link to demo or video

Repo Link 1

Repo Link 2

Repo Link 2

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open access.
open data platforms.
open markets.

Refinitive is now part of
London Stock Exchange Group



indexes

- [Equity](#) >
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- [Fixed Income](#) >
- [Real Estate](#) >
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- [Multi-Asset](#) >



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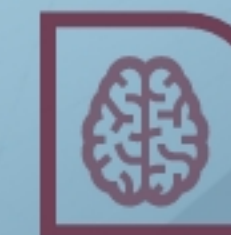
research

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data

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events

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blog

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indexes

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research

Description with link to demo or video



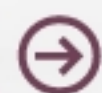
data

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events

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blog

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[more](#)



the
end

thank you...