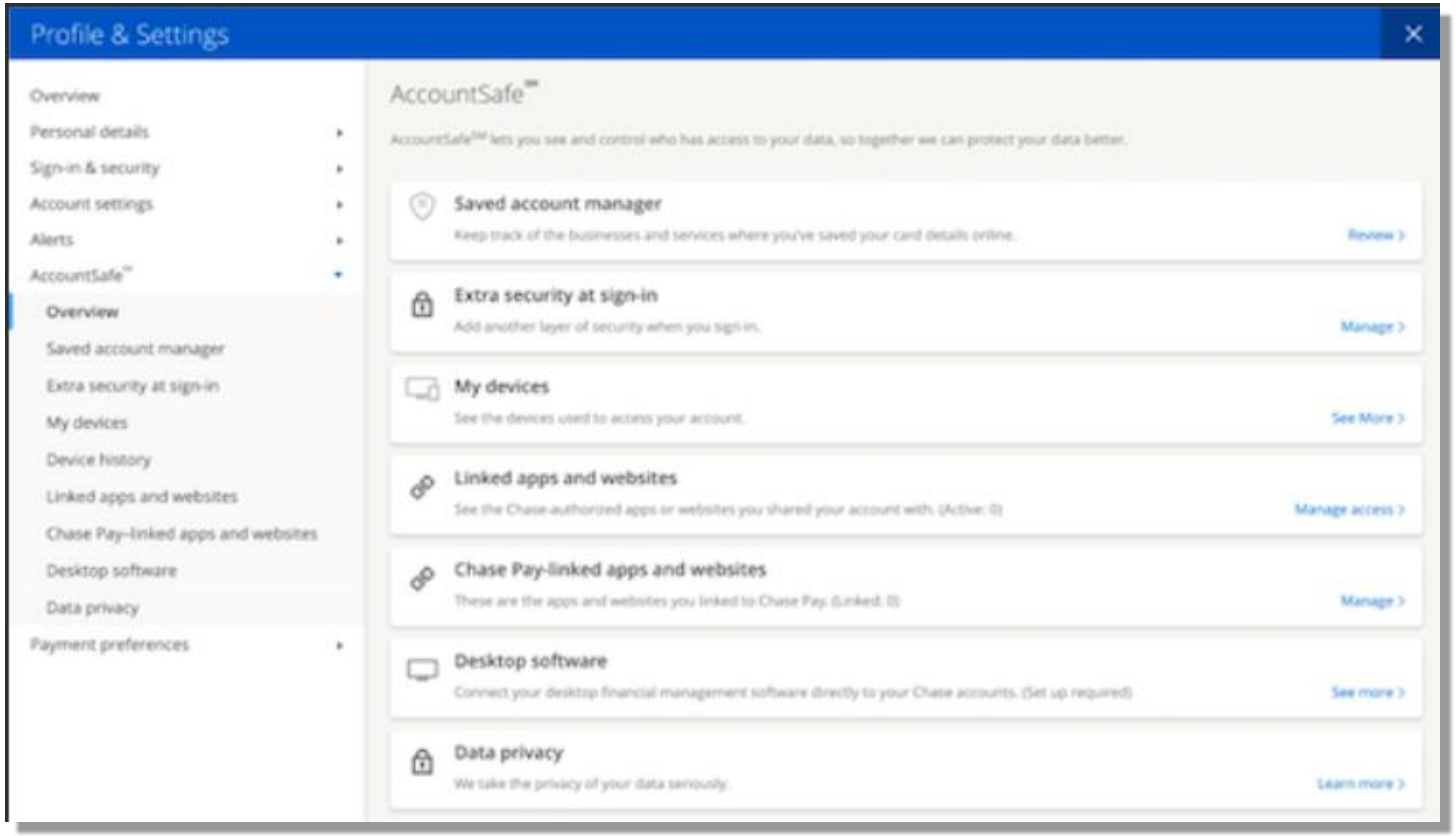
Security Center

JPMorgan Chase platform and dashboard product strategy

Baseline testing

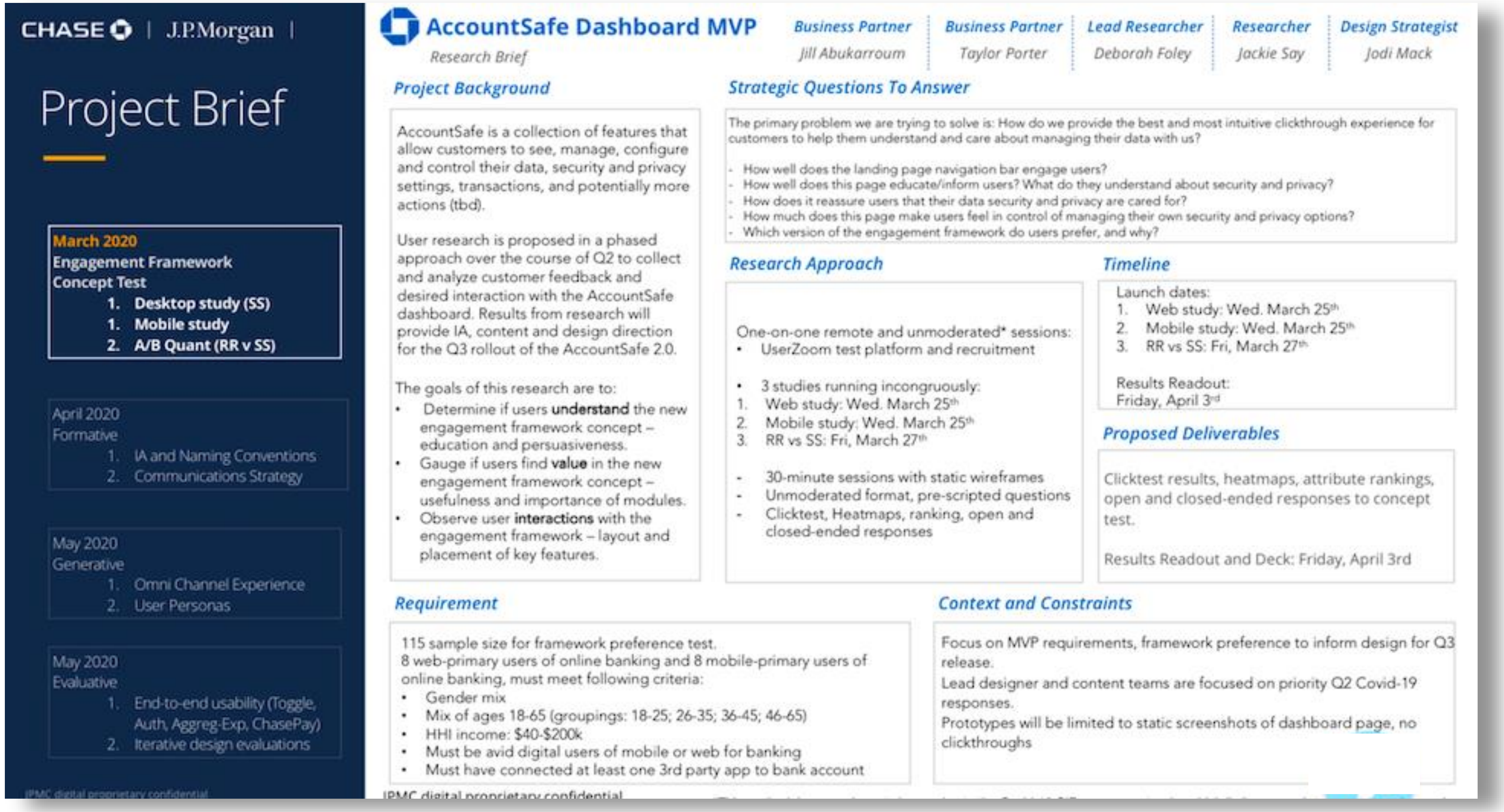
Analytics was showing no-one was discovering or interacting with our security features.



Goals

In 2018, Security was trending as a key opportunity to help build brand trust for banks.

- Help with discovery
- Improve engagement
- Do users find value in the features?
- How well do we educate the users?


CHASE | J.P.Morgan |

Project Brief

March 2020
Engagement Framework Concept Test
1. **Desktop study (SS)**
1. **Mobile study**
2. **A/B Quant (RR v SS)**

April 2020
Formative
1. IA and Naming Conventions
2. Communications Strategy

May 2020
Generative
1. Omni Channel Experience
2. User Personas

May 2020
Evaluative
1. End-to-end usability (Toggle, Auth, Aggreg-Exp, ChasePay)
2. Iterative design evaluations

JPMC digital proprietary confidential

AccountSafe Dashboard MVP
Research Brief

Business Partner	*Business Partner*	*Lead Researcher*	*Researcher*	*Design Strategist*
Jill Abukarroum	*Taylor Porter*	*Deborah Foley*	*Jackie Say*	*Jodi Mack*

Project Background

AccountSafe is a collection of features that allow customers to see, manage, configure and control their data, security and privacy settings, transactions, and potentially more actions (tbd).

User research is proposed in a phased approach over the course of Q2 to collect and analyze customer feedback and desired interaction with the AccountSafe dashboard. Results from research will provide IA, content and design direction for the Q3 rollout of the AccountSafe 2.0.

The goals of this research are to:
- Determine if users **understand** the new engagement framework concept – education and persuasiveness.
- Gauge if users find **value** in the new engagement framework concept – usefulness and importance of modules.
- Observe user **interactions** with the engagement framework – layout and placement of key features.

Strategic Questions To Answer

The primary problem we are trying to solve is: How do we provide the best and most intuitive clickthrough experience for customers to help them understand and care about managing their data with us?

- How well does the landing page navigation bar engage users?
- How well does this page educate/inform users? What do they understand about security and privacy?
- How does it reassure users that their data security and privacy are cared for?
- How much does this page make users feel in control of managing their own security and privacy options?
- Which version of the engagement framework do users prefer, and why?

Research Approach

One-on-one remote and unmoderated* sessions:
- UserZoom test platform and recruitment

- 3 studies running incongruously:
1. Web study: Wed. March 25th
2. Mobile study: Wed. March 25th
3. RR vs SS: Fri, March 27th

- 30-minute sessions with static wireframes
- Unmoderated format, pre-scripted questions
- Clicktest, Heatmaps, ranking, open and closed-ended responses

Timeline

Launch dates:
1. Web study: Wed. March 25th
2. Mobile study: Wed. March 25th
3. RR vs SS: Fri, March 27th

Results Readout:
Friday, April 3rd

Proposed Deliverables

Clicktest results, heatmaps, attribute rankings, open and closed-ended responses to concept test.

Results Readout and Deck: Friday, April 3rd

Requirement

115 sample size for framework preference test.
8 web-primary users of online banking and 8 mobile-primary users of online banking, must meet following criteria:
- Gender mix
- Mix of ages 18-65 (groupings: 18-25; 26-35; 36-45; 46-65)
- HHI income: $40-$200k
- Must be avid digital users of mobile or web for banking
- Must have connected at least one 3rd party app to bank account

Context and Constraints

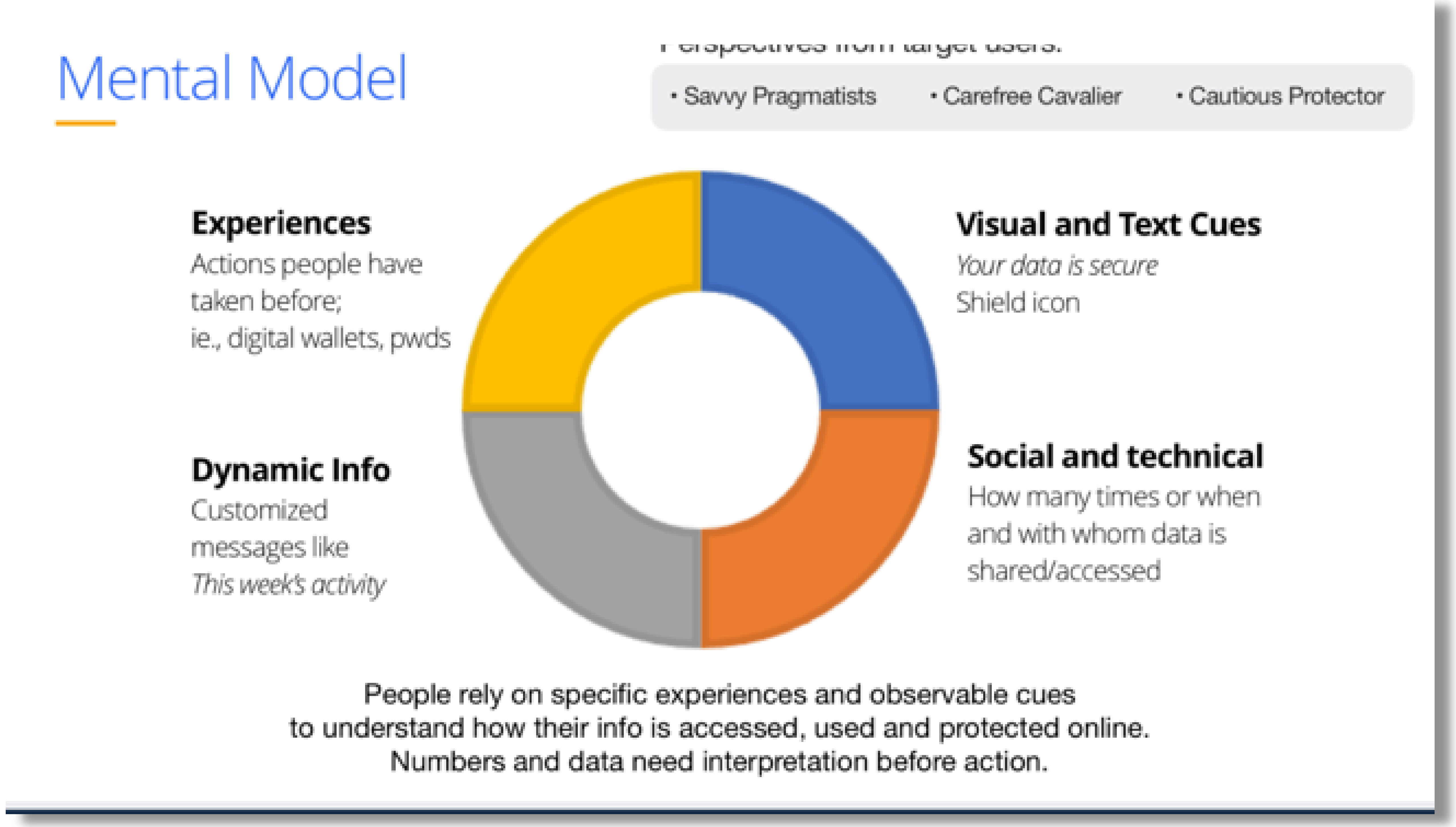
Focus on MVP requirements, framework preference to inform design for Q3 release.
Lead designer and content teams are focused on priority Q2 Covid-19 responses.
Prototypes will be limited to static screenshots of dashboard page, no clickthroughs

JPMC digital proprietary confidential

Generative testing

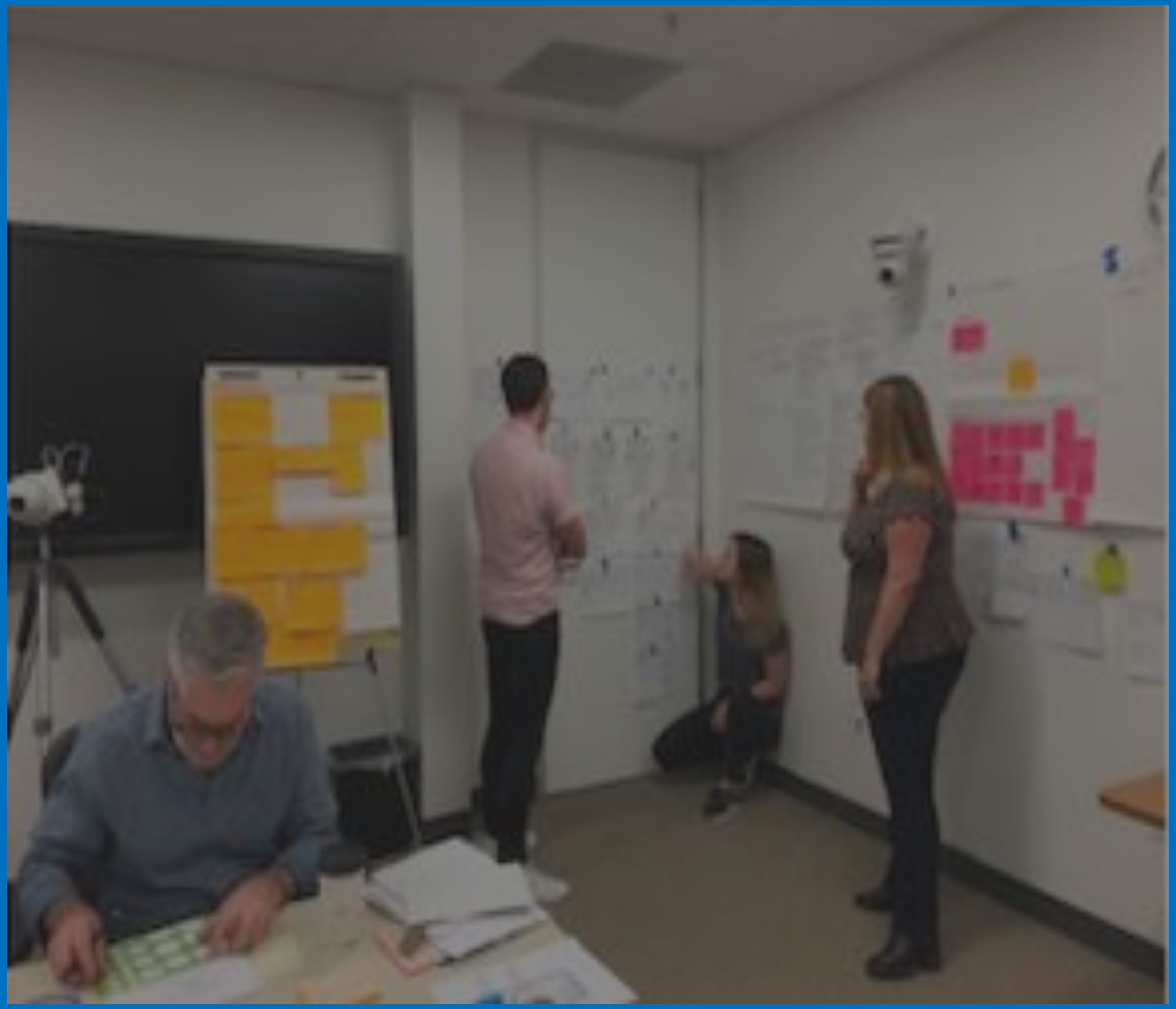
- There are three different type of users with different needs.
- They have different needs of education and reassurance.
- Customers do not expect security features, therefor they do not look for them.

Customer Mental Models

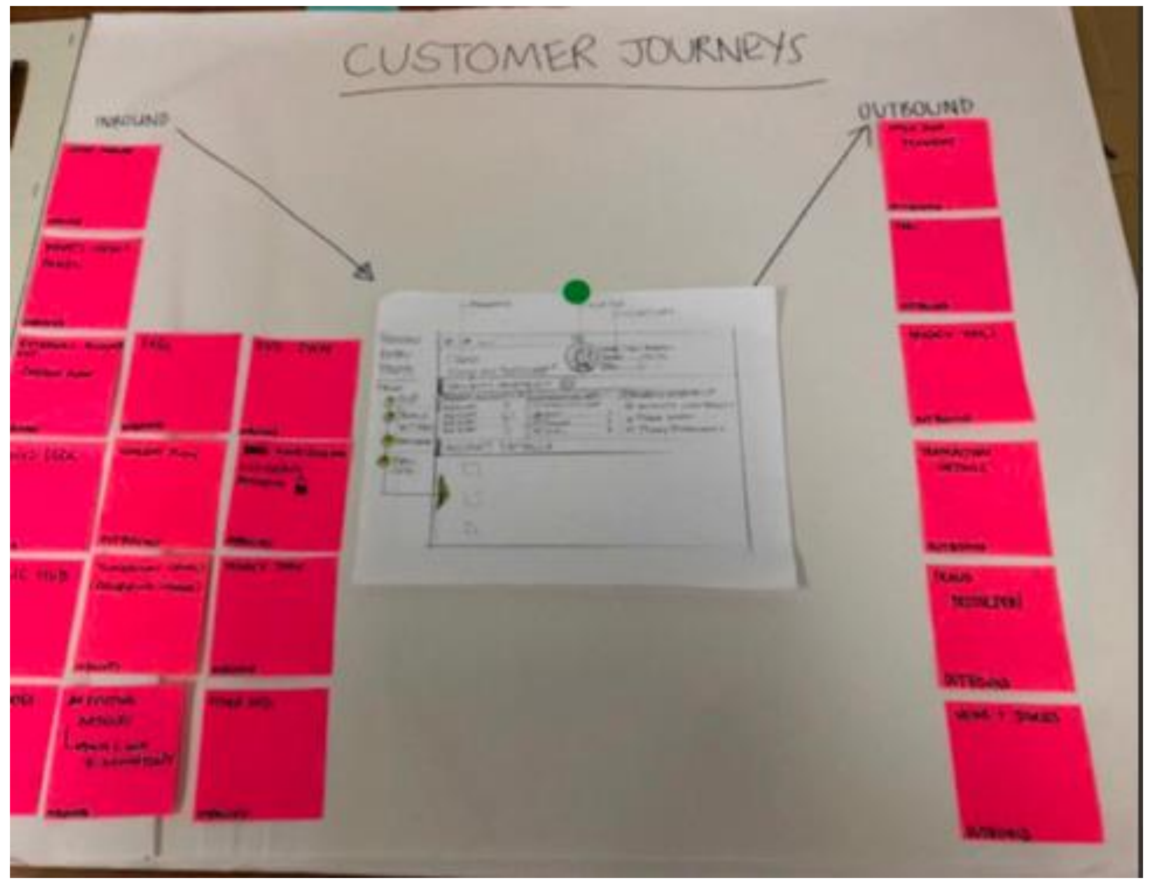


Design Sprint

Facilitated a one-week workshop with the goal to align with the many feature stakeholders and technology teams.

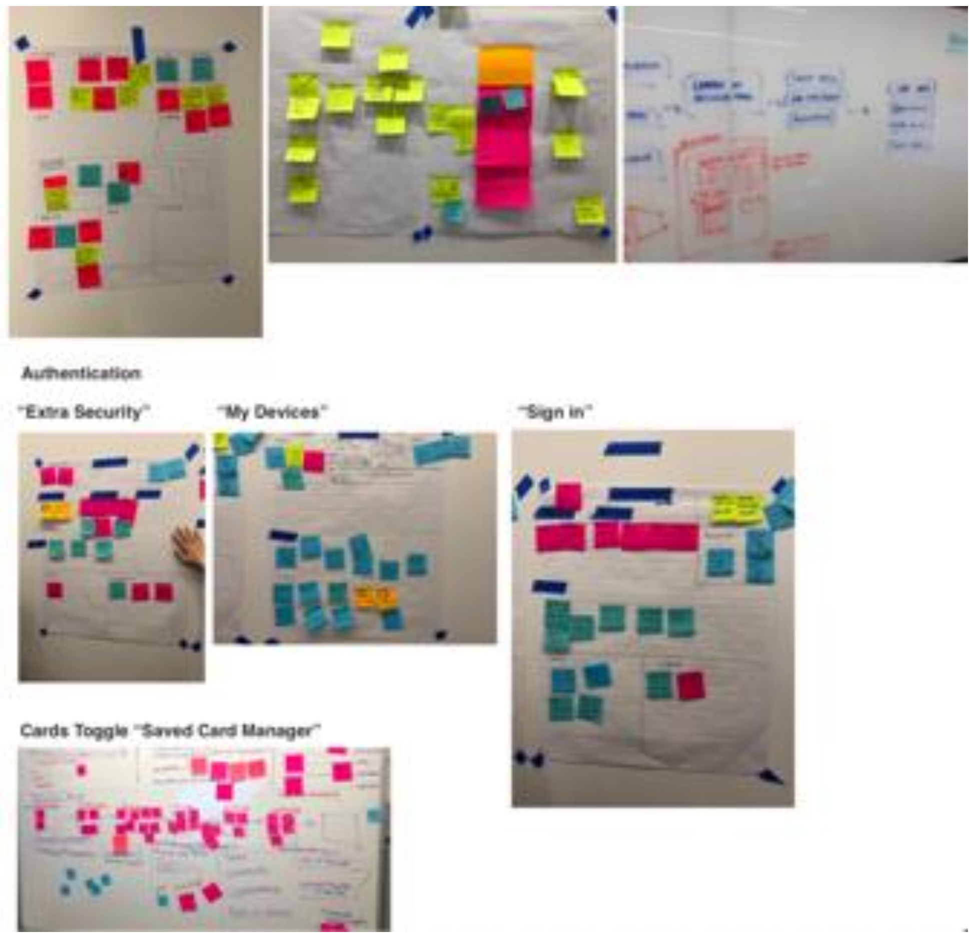


Ask the experts – Day 1



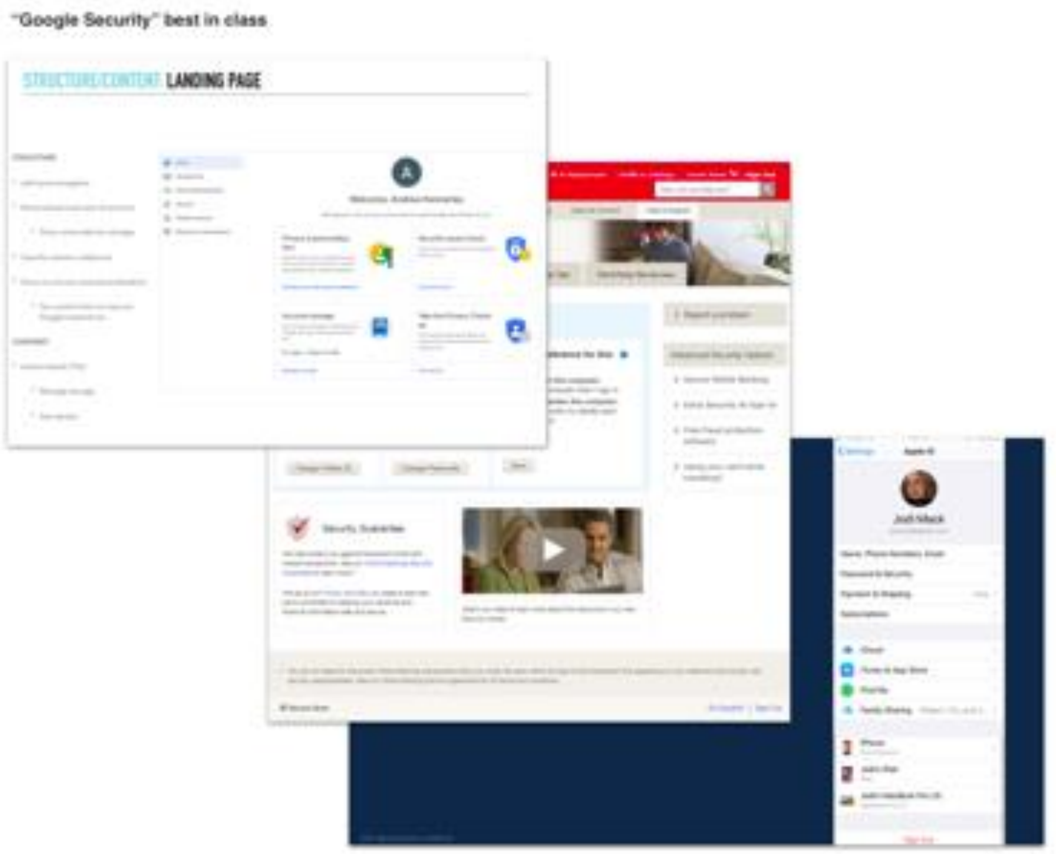
Customer Journey

Looked at potential touchpoints to understand user flows to entry points and discoverability.



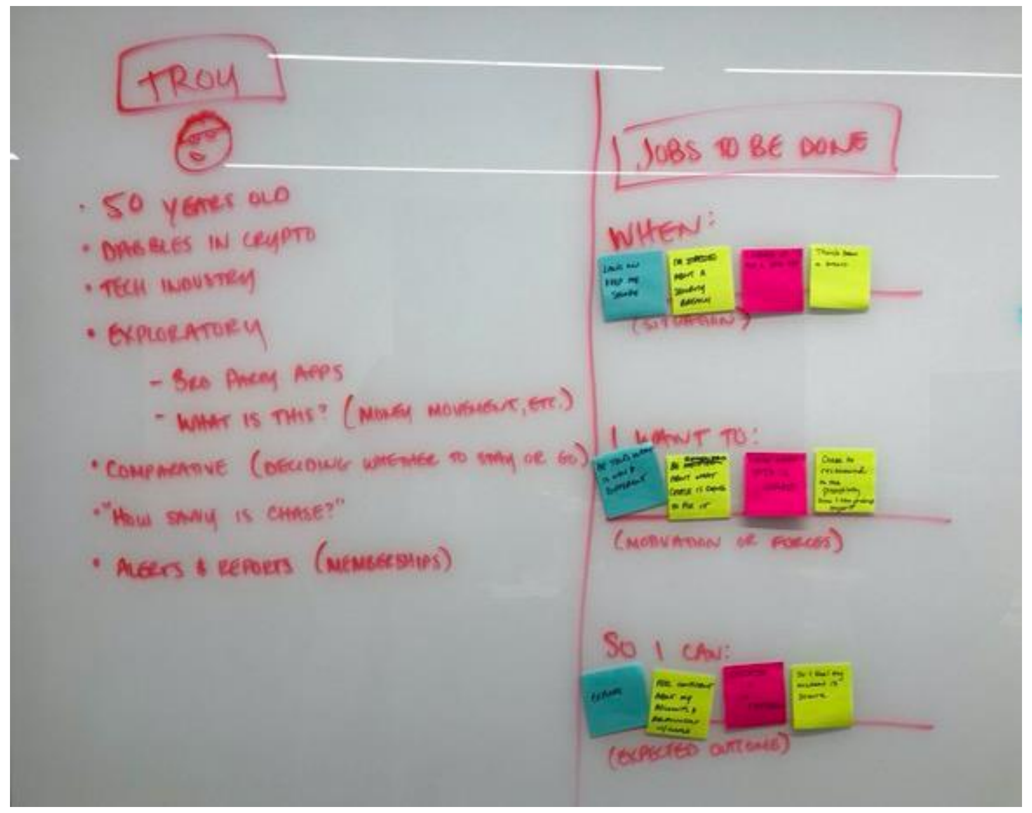
Feature Roadmaps and knowledge sharing

Breakout sessions to understand the different product roadmaps, user journeys, data, goals and systems.



Effective security experiences

Homework was for everyone to research effective security experiences for inspiration.



Defining the persona and jobs to be done

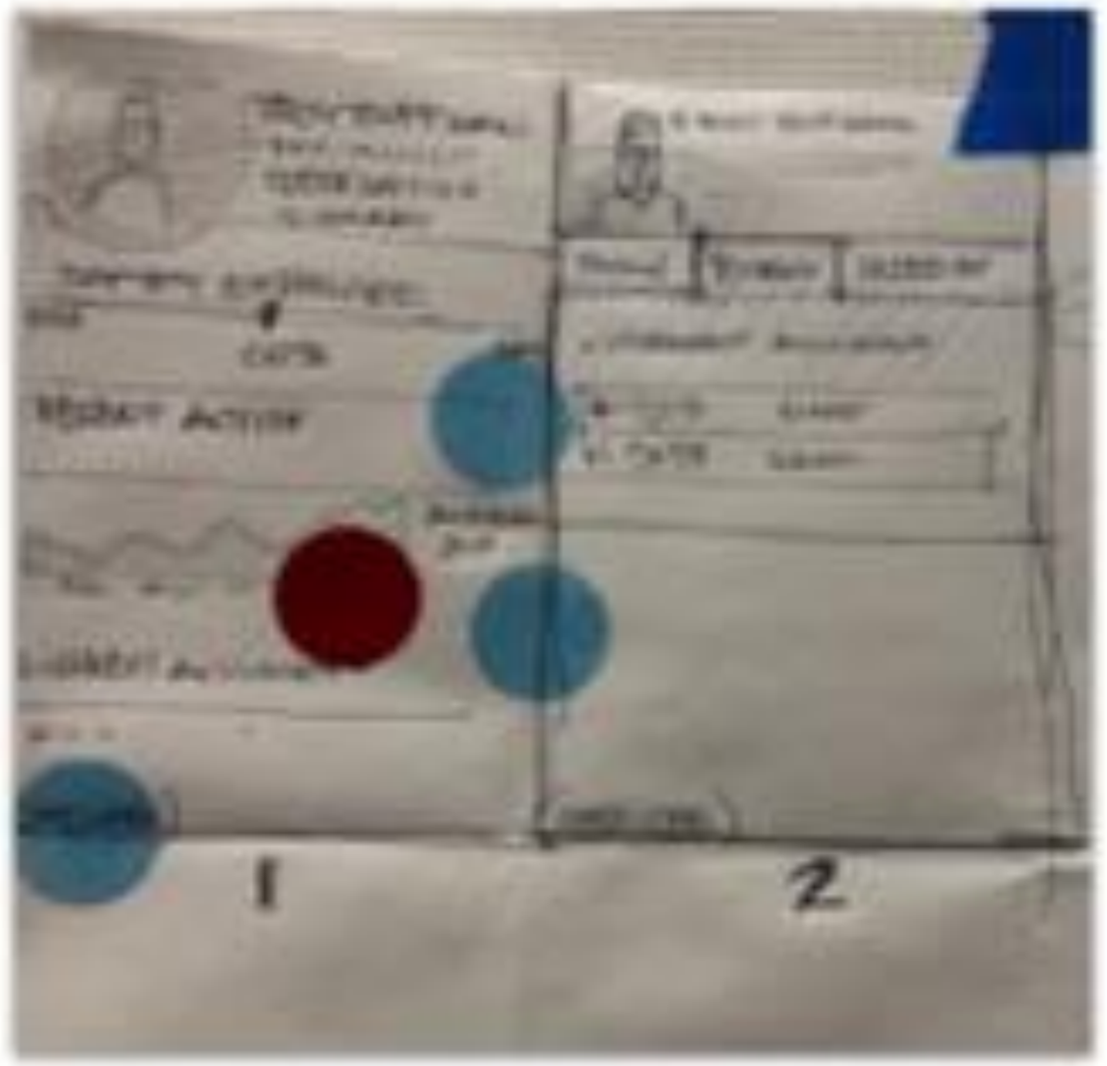
Prepare for an ideation session to solution a problem for the user.

Design Studio

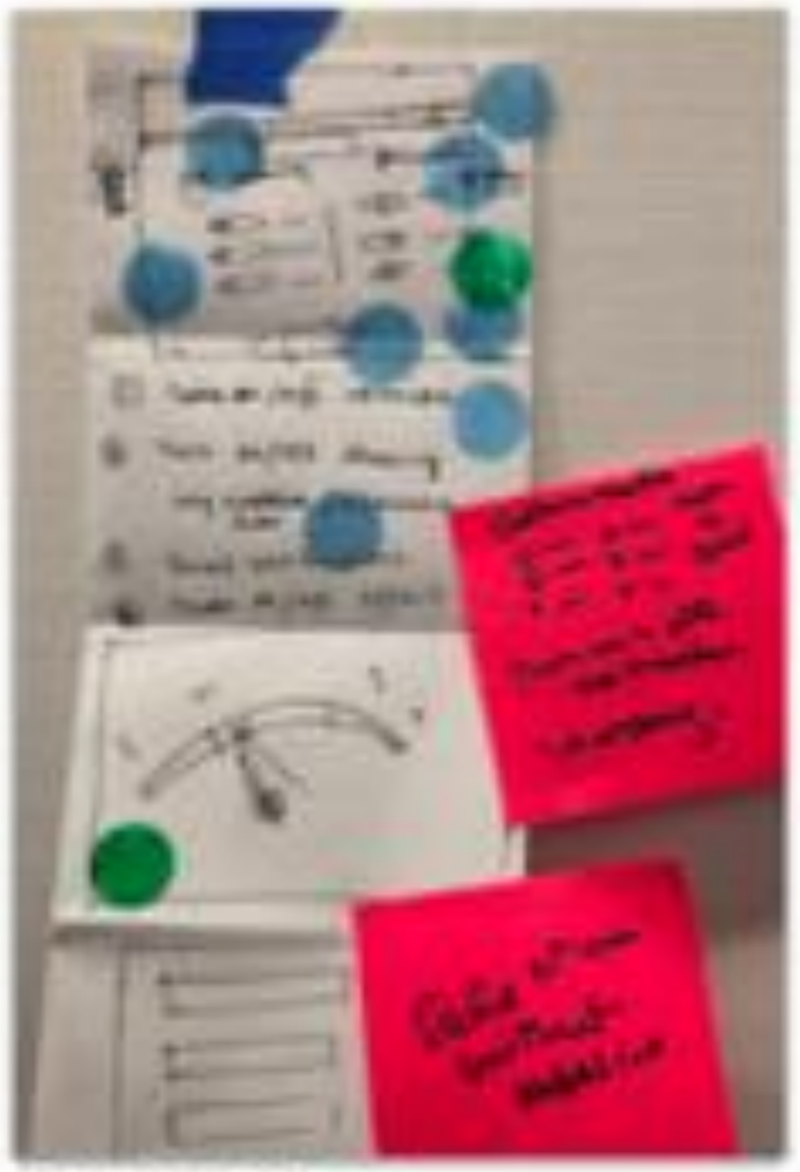
Facilitated a sketch session to diverge and converge on many ideas and vote on the best concepts. We had about 20 in the session.

By objects

Dashboard



Customization



There has been a breach

Engagement and Card UI

Your activities

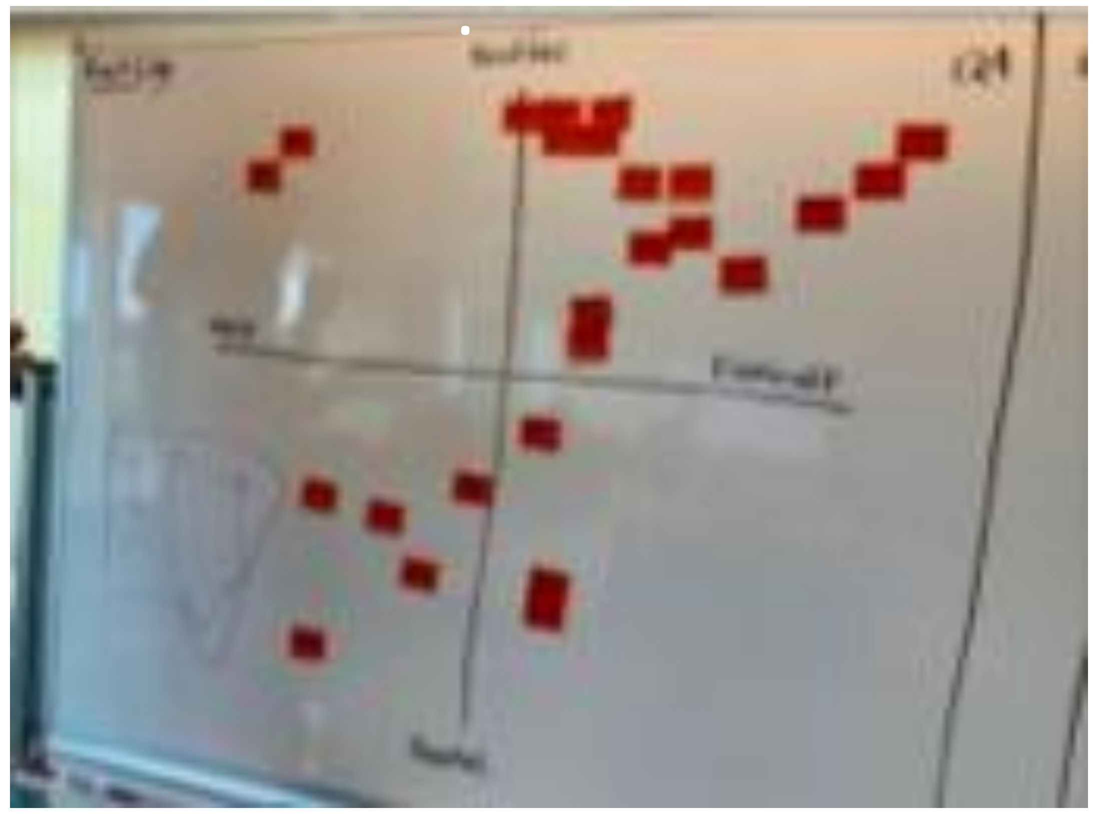
Roadmap Workshop – Day 2

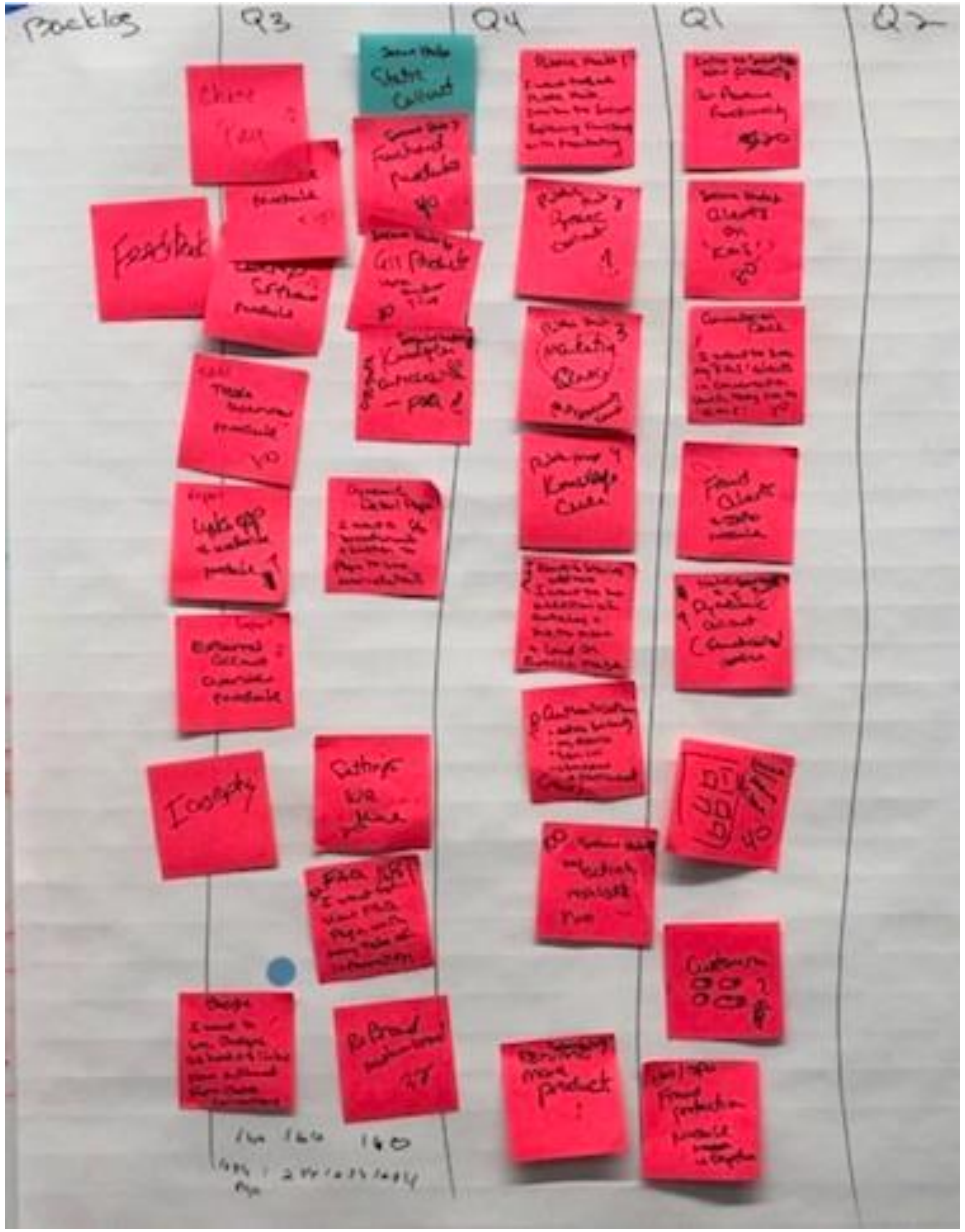
End to end journey

Modular backlog items

Poker planning estimation

Customer value matrix

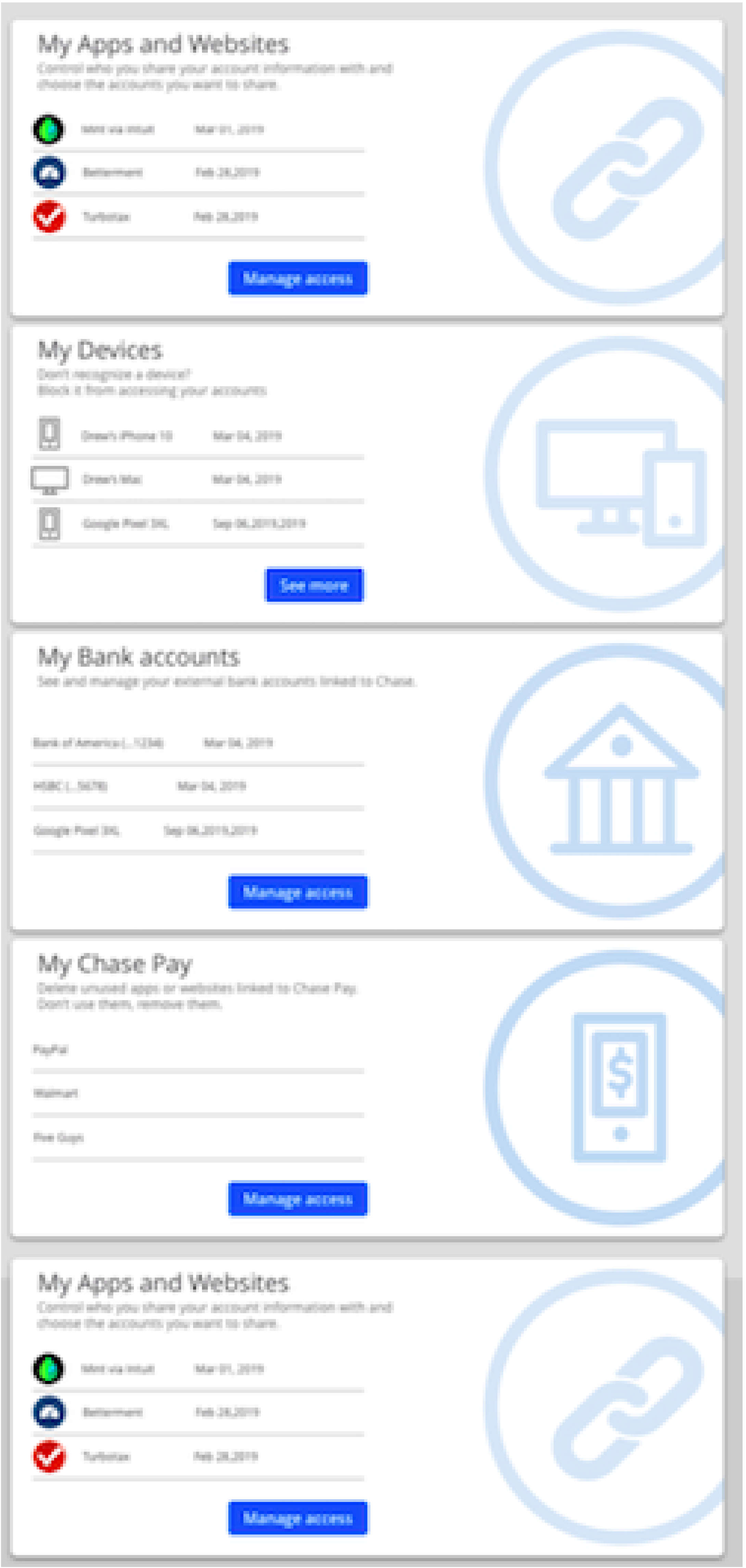




Concept ideation - Day 3

The team spent the rest of the week refining & sketching prototypes.

With no mental model of expecting security features, can we bring list views to a dashboard view and help with visual cues and education for quicker understanding of both the what and why they should be engaging with these features.

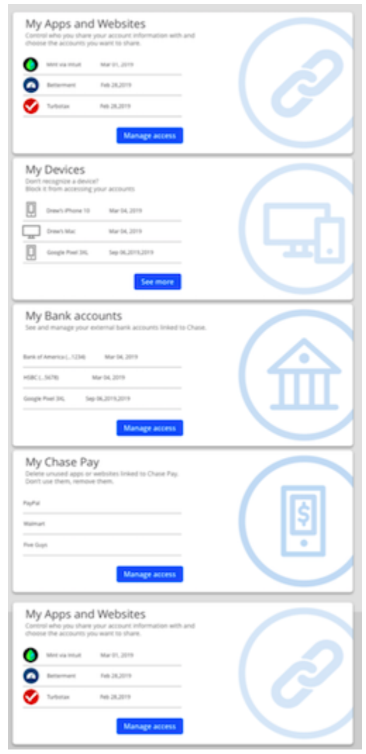


Skim, dip, & dive - modular tiles

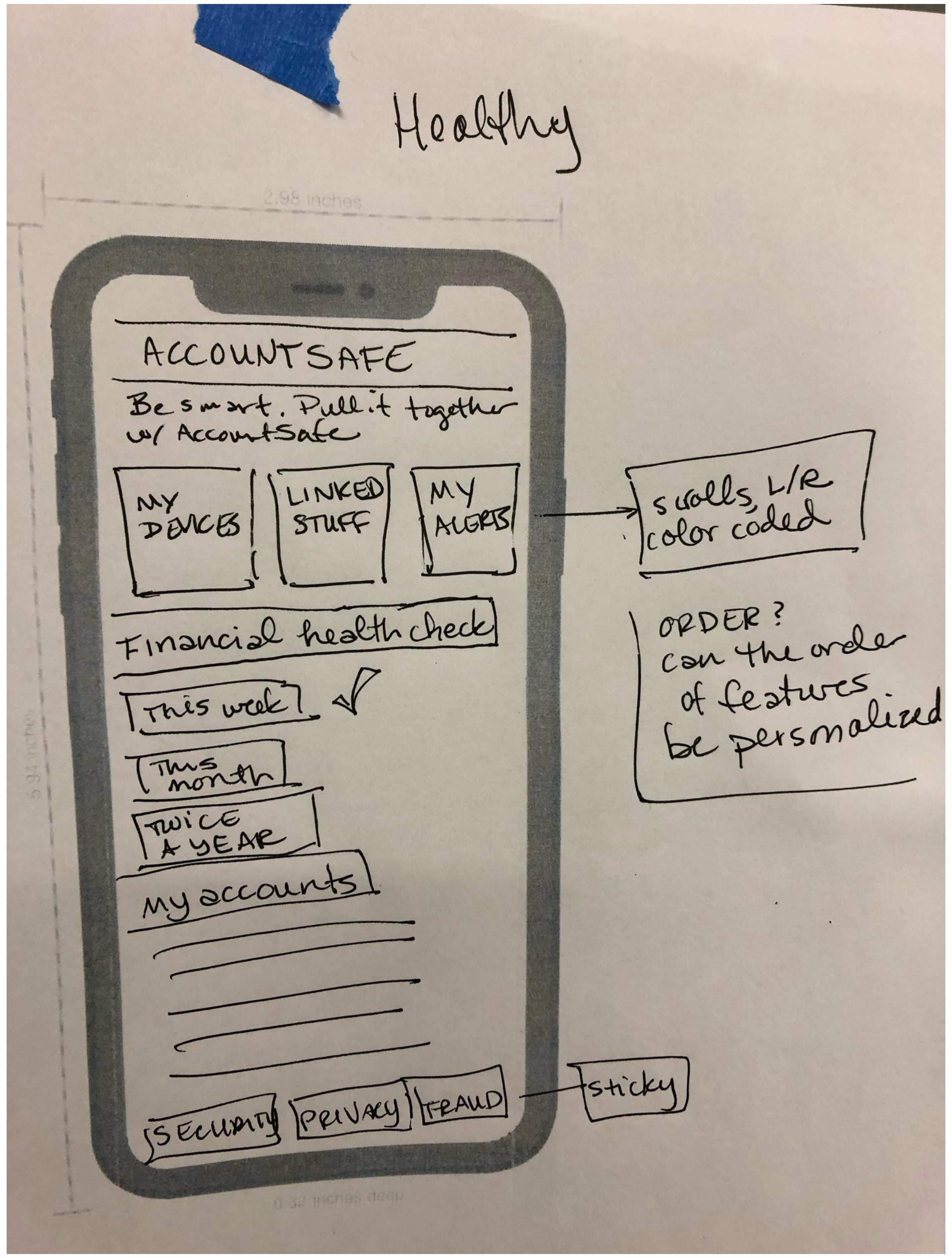
Concept ideation - Day 3

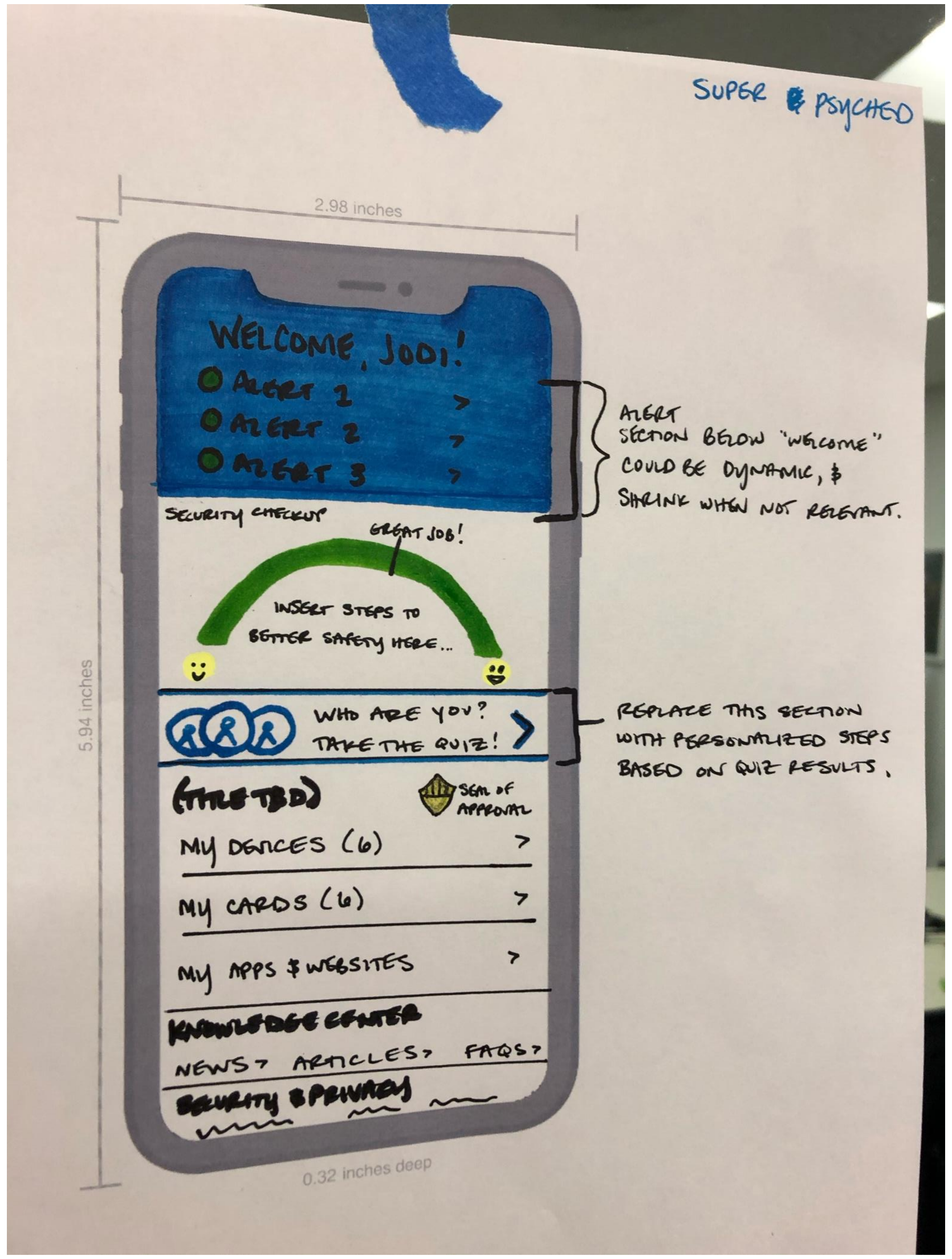
The team spent the rest of the week refining & sketching prototypes.

Skim, dip, & dive - modular tiles



Mobile iconography tiles or list views

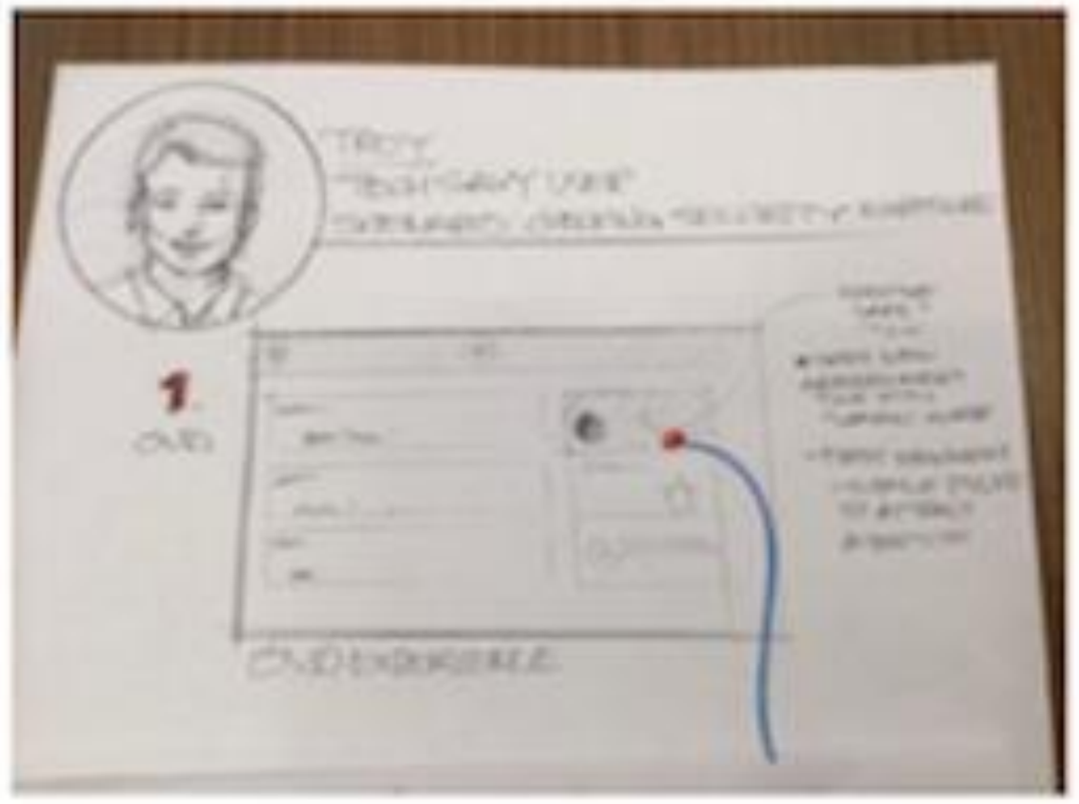


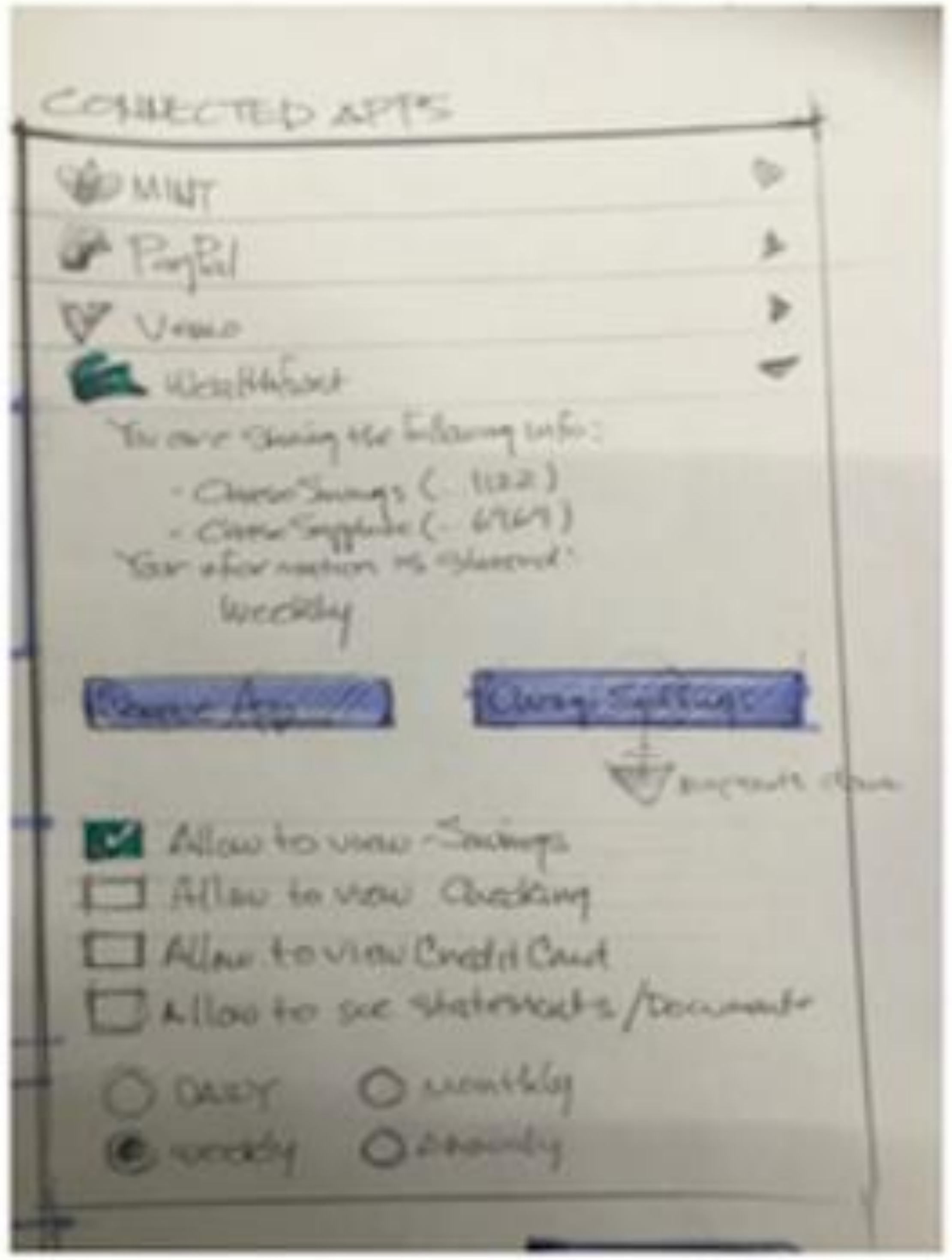


Concept ideation - Day 3

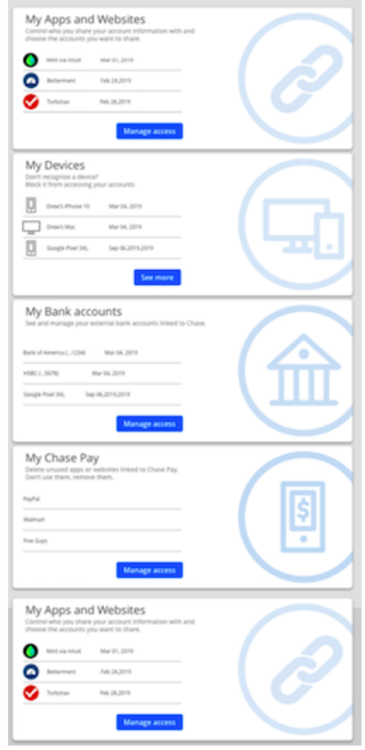
The team spent the rest of the week refining & sketching prototypes.

One stop shop dashboards

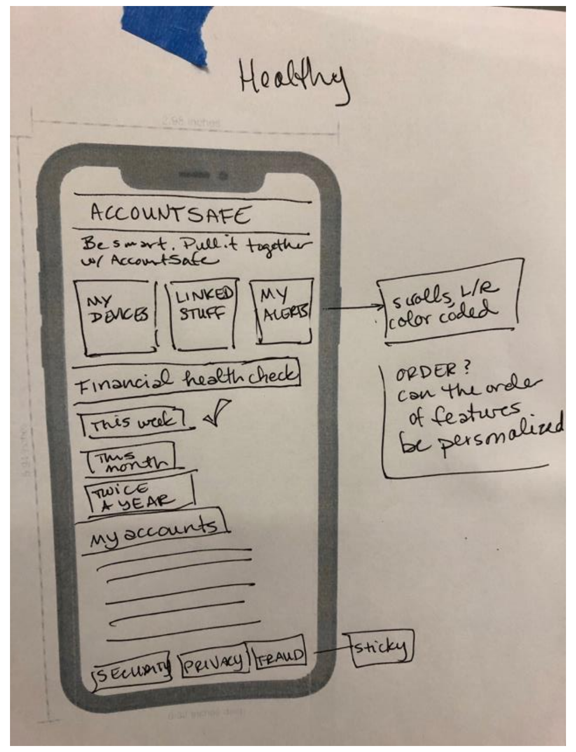


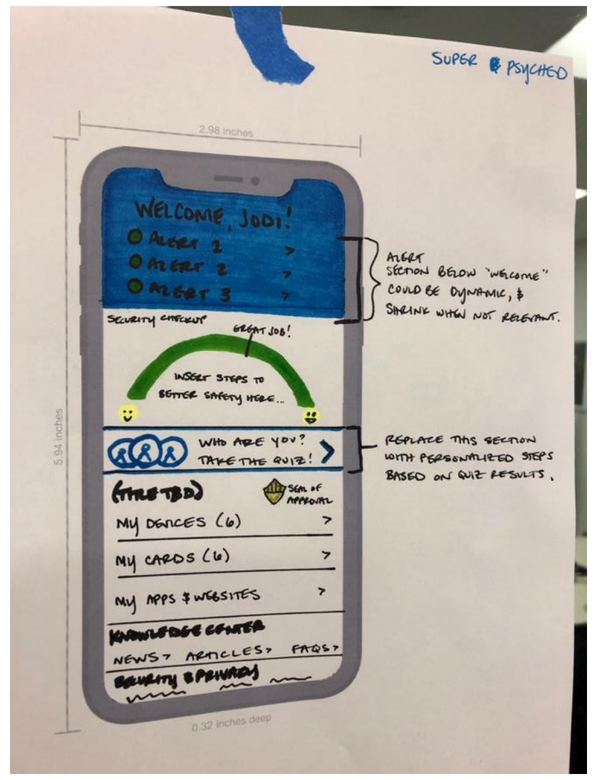


Skim, dip, & dive - modular tiles



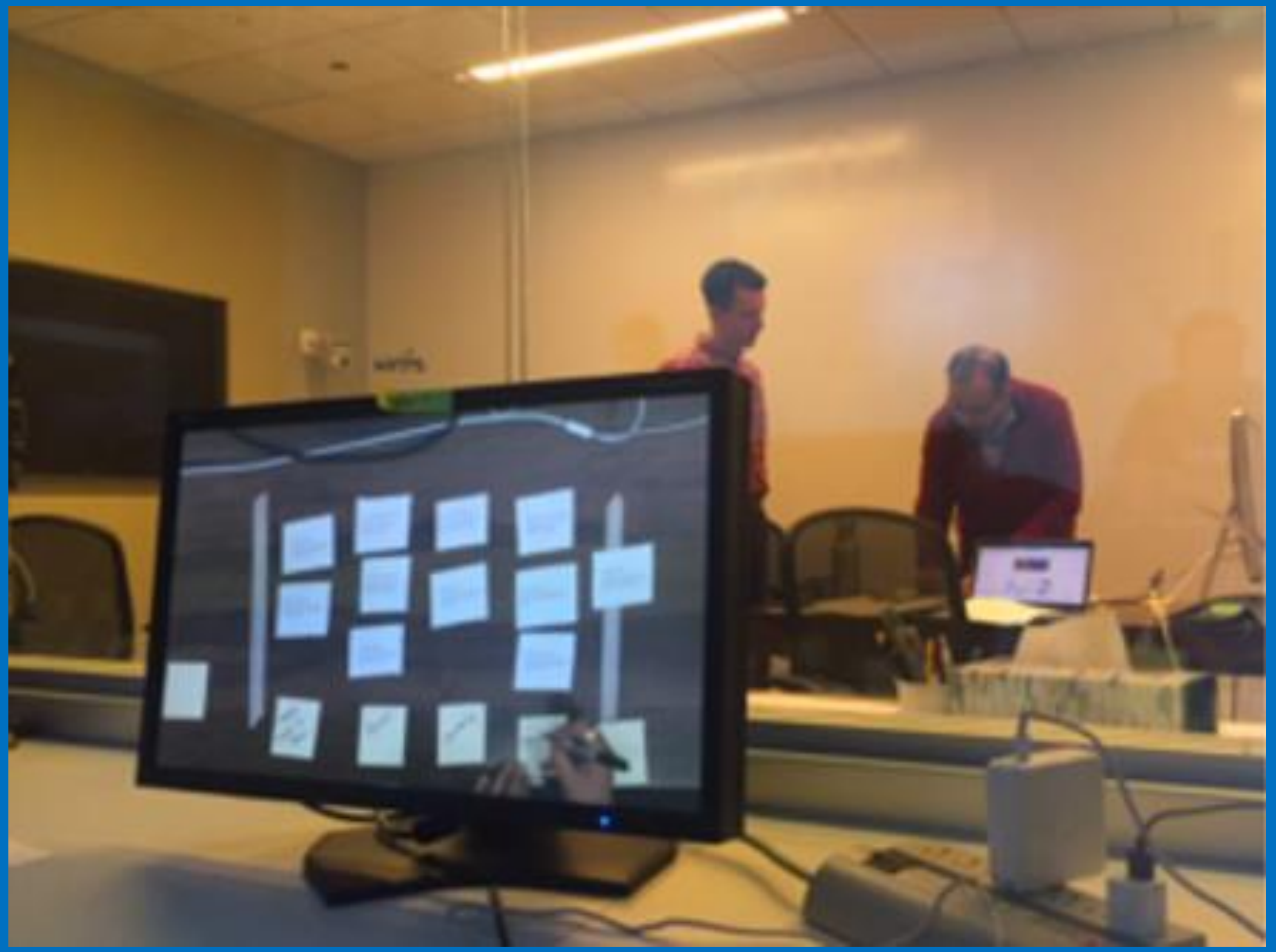
Mobile iconography tiles or list views



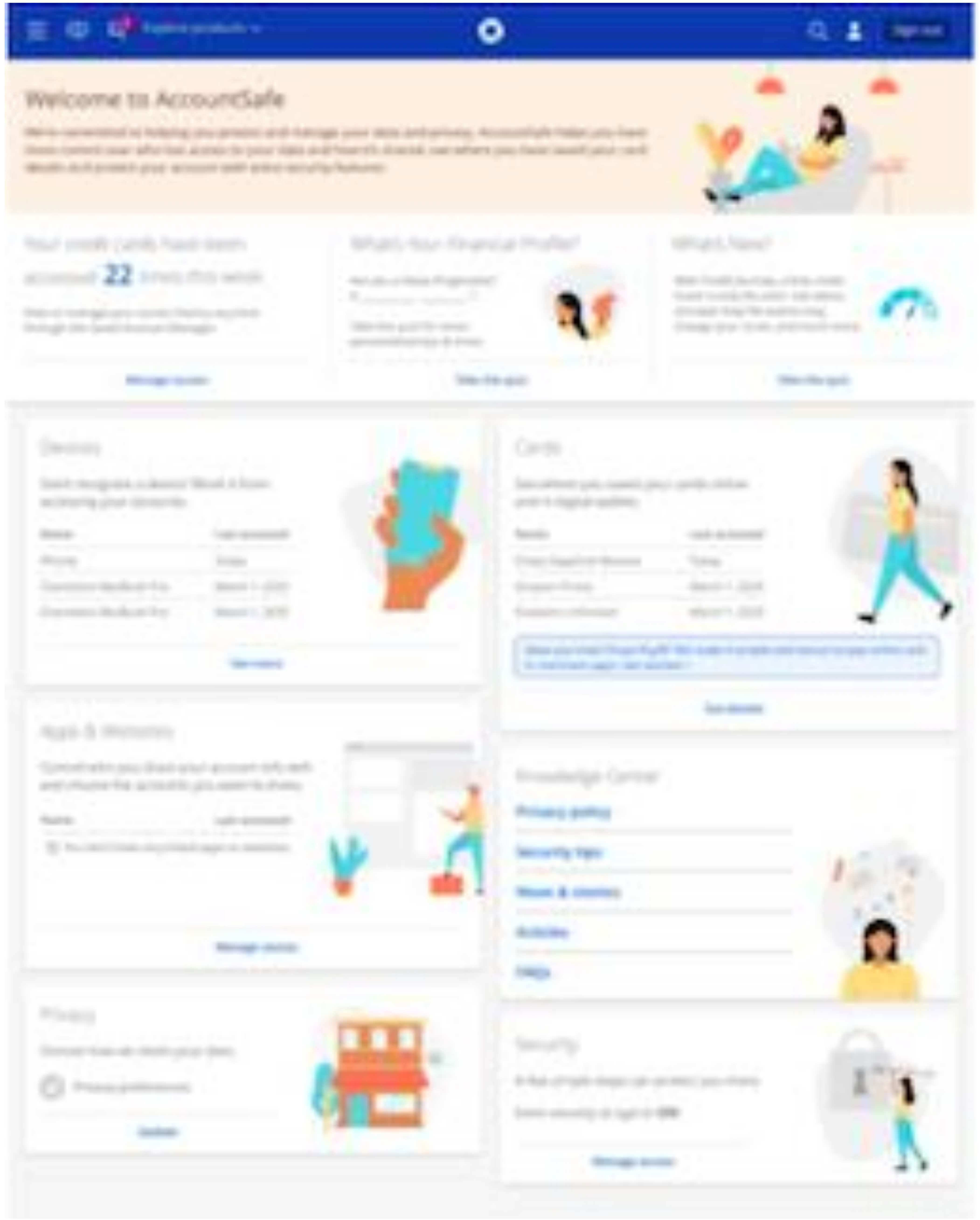


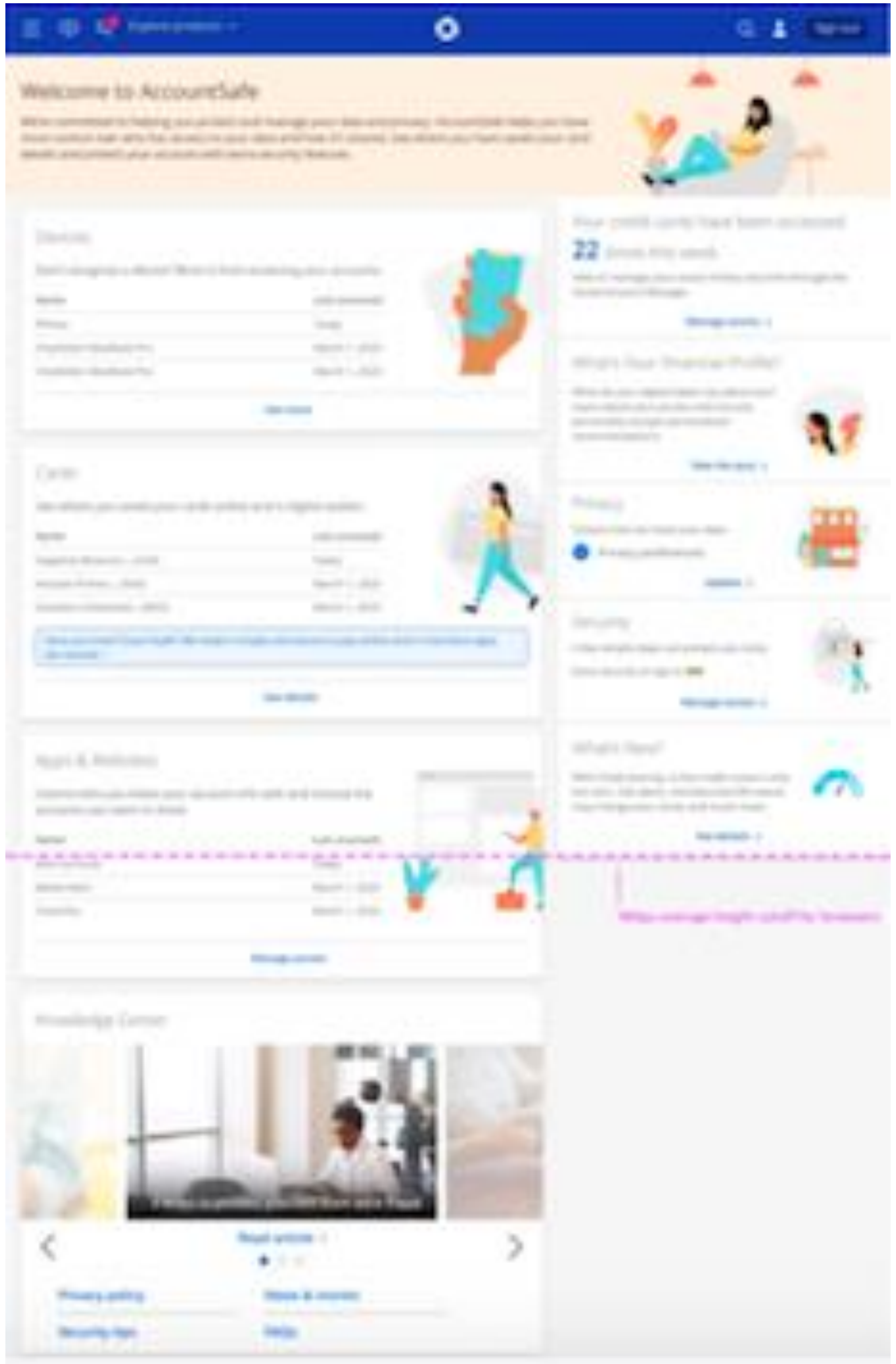
User Research

Test our assumptions and get feedback from our users.



Web A / B testing

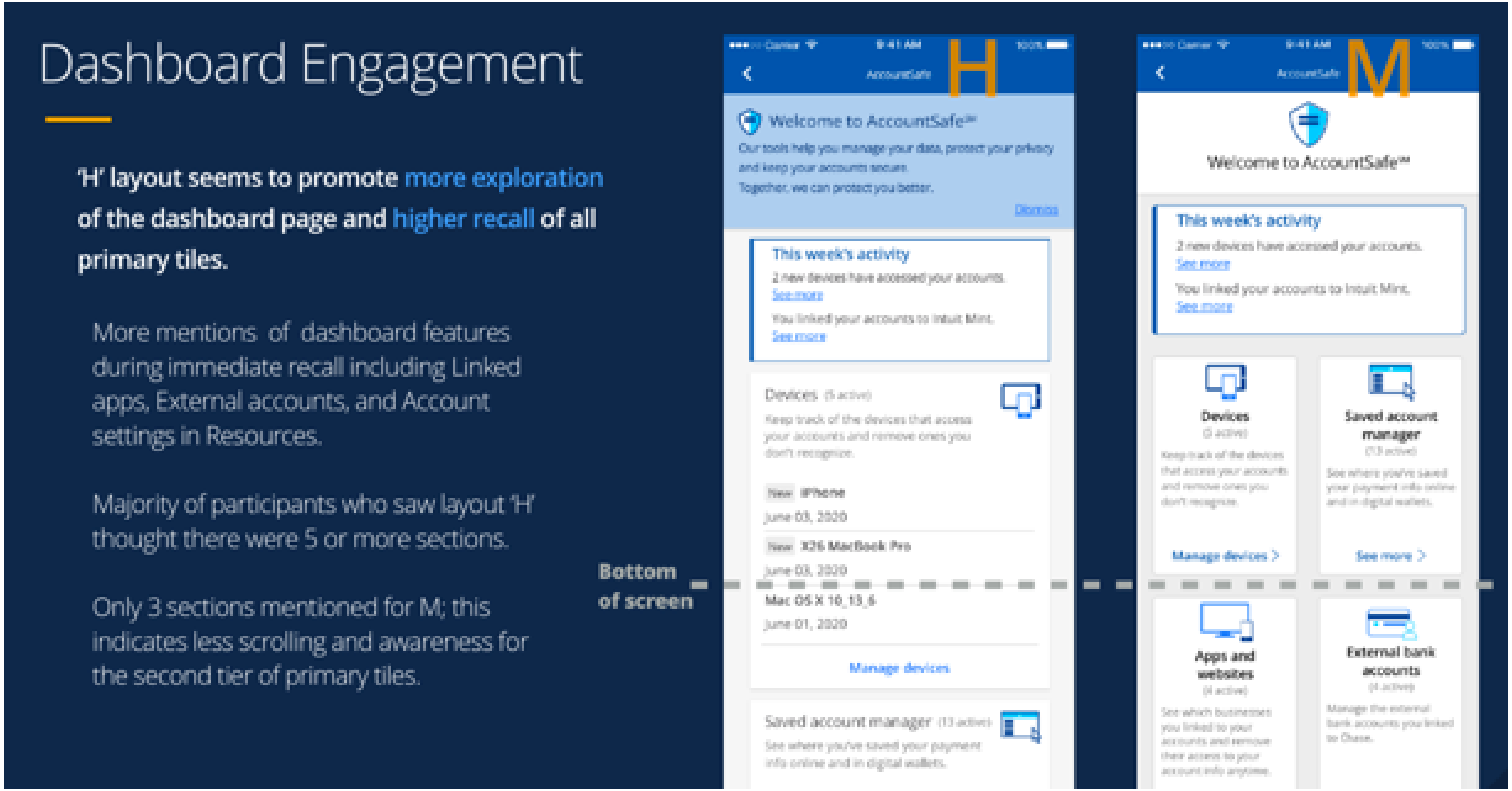




Eye Tracking

Split screen did slightly better with click rates.

Mobile A / B testing



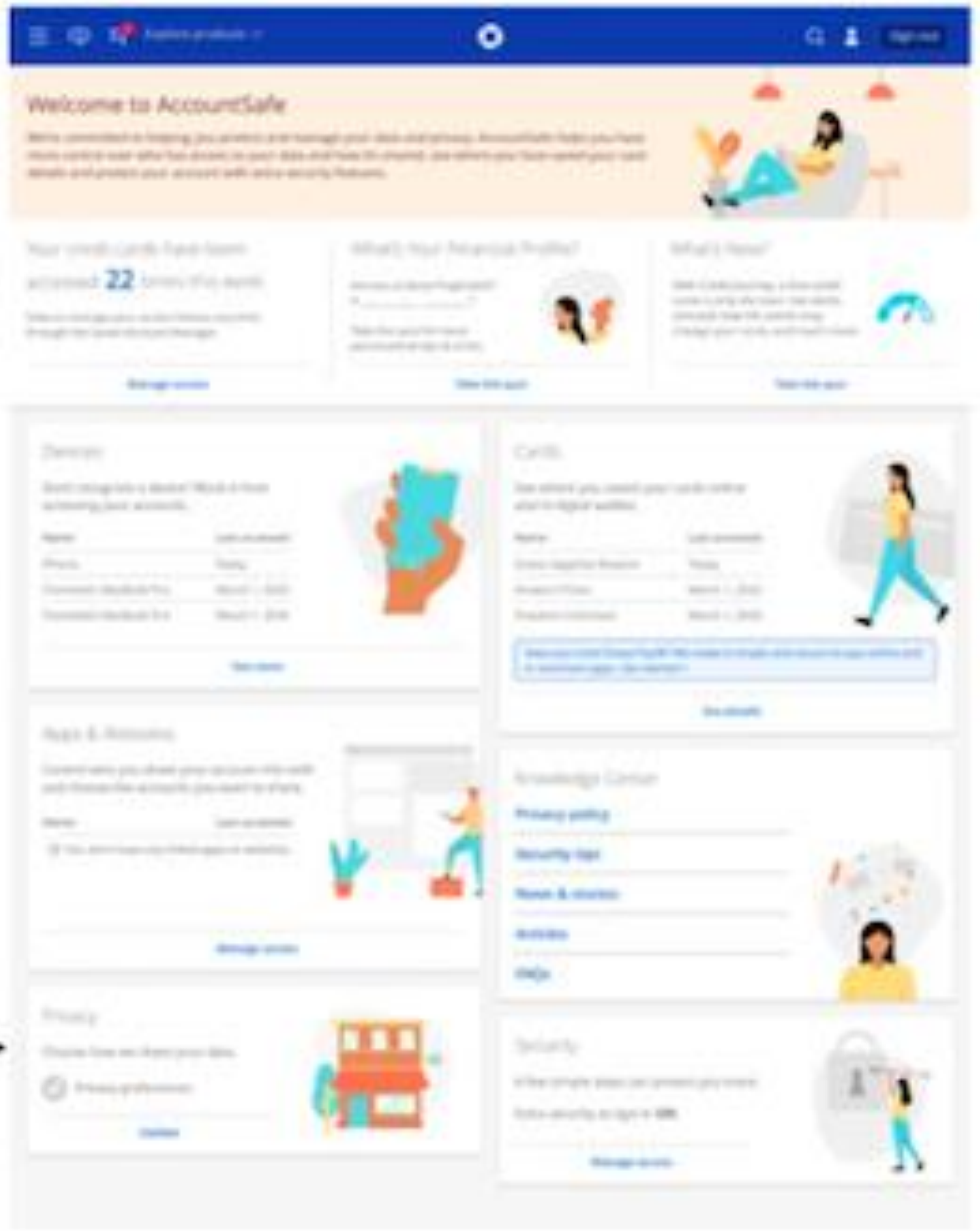
Hub & Spoke Proposal

Value Proposition Banner
Users need an explanation of what this page is and why should they care. Users don't have any experience interacting with security and privacy tools—especially in a banking platform. We need to tell them what the page can do for them.

Personalization Q4
With Your Alerts and activities we will help drive users back to the page to see the latest security and privacy activities.

Feature cards
Our different products will each have a card that gives a brief educational summary, snapshot of their activity and a link to view full view.

Important callouts
For some scenarios we have important legal callouts as an example "Privacy documentation". We need to make sure users are aware of other tools available to them that relate to security & privacy, fraud and other settings tools.



AccountSafe new Masterbrand illustration feel
AccountSafe along with Home Lending and Mobile Next are the first slated to come out with the new feel of our Masterbrand Note: This is a placeholder - the Masterbrand team is engaged.

Engagement Quiz and What's New
Quiz helps identify user of how careful, smart or cavalier they are with their data and we will make recommendations about what features they may find useful in AccountSafe.

With many exciting tools being added on through 2020, credit journey and Privacy tools freemium and premium services we want to share with are users some announcements until we see if these additional tools can be integrated.

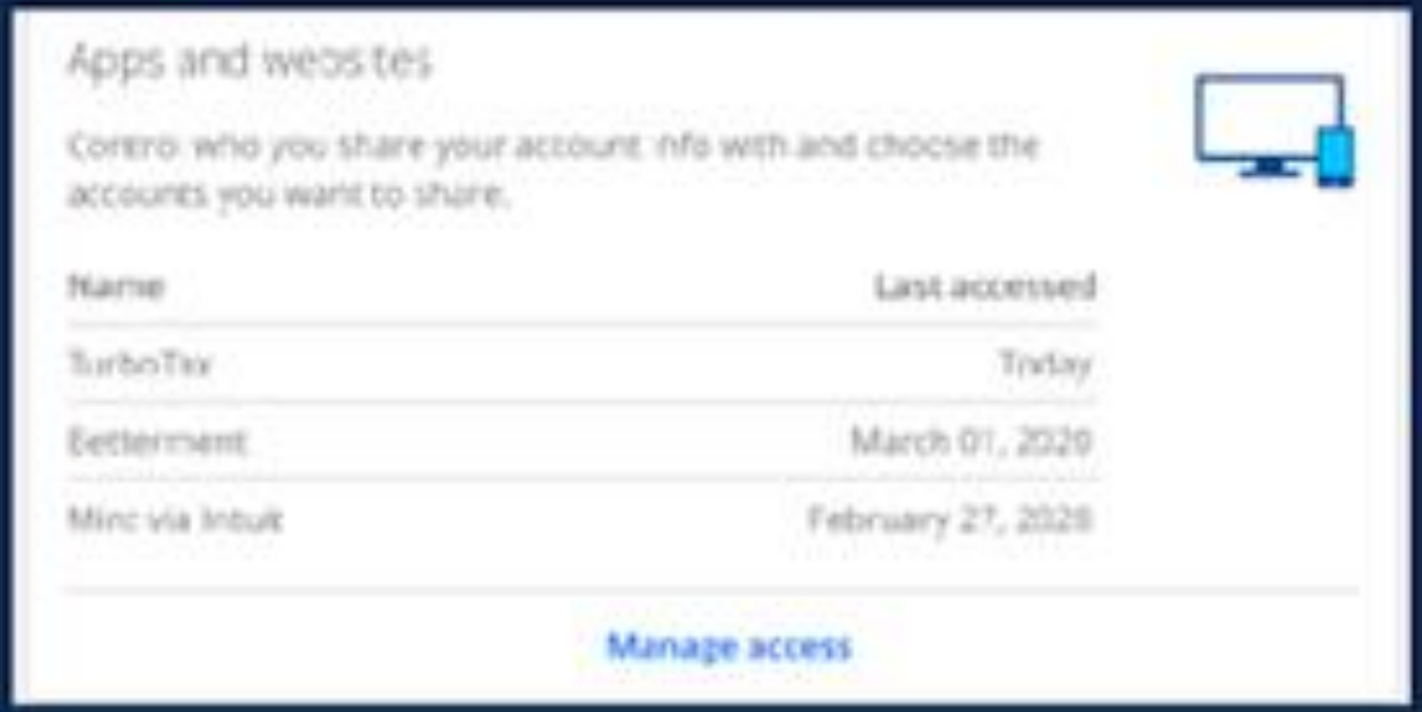
Marketing Nudge
In some cases we're grouping items together, because it makes since to the user and we may call out a marketing "blurb" to pull attention to the product and make them aware of this useful feature. Chase Pay may be one example of this.

Having two views of External Accounts either though AccountSafe or on their Investment dashboard is another example.

Knowledge Center
We have many articles and links spread out throughout the applications about security, privacy and fraud that are not easily found. We are proposing to collect and organize them and make them easily discoverable.

Apps and websites

CPO_v1



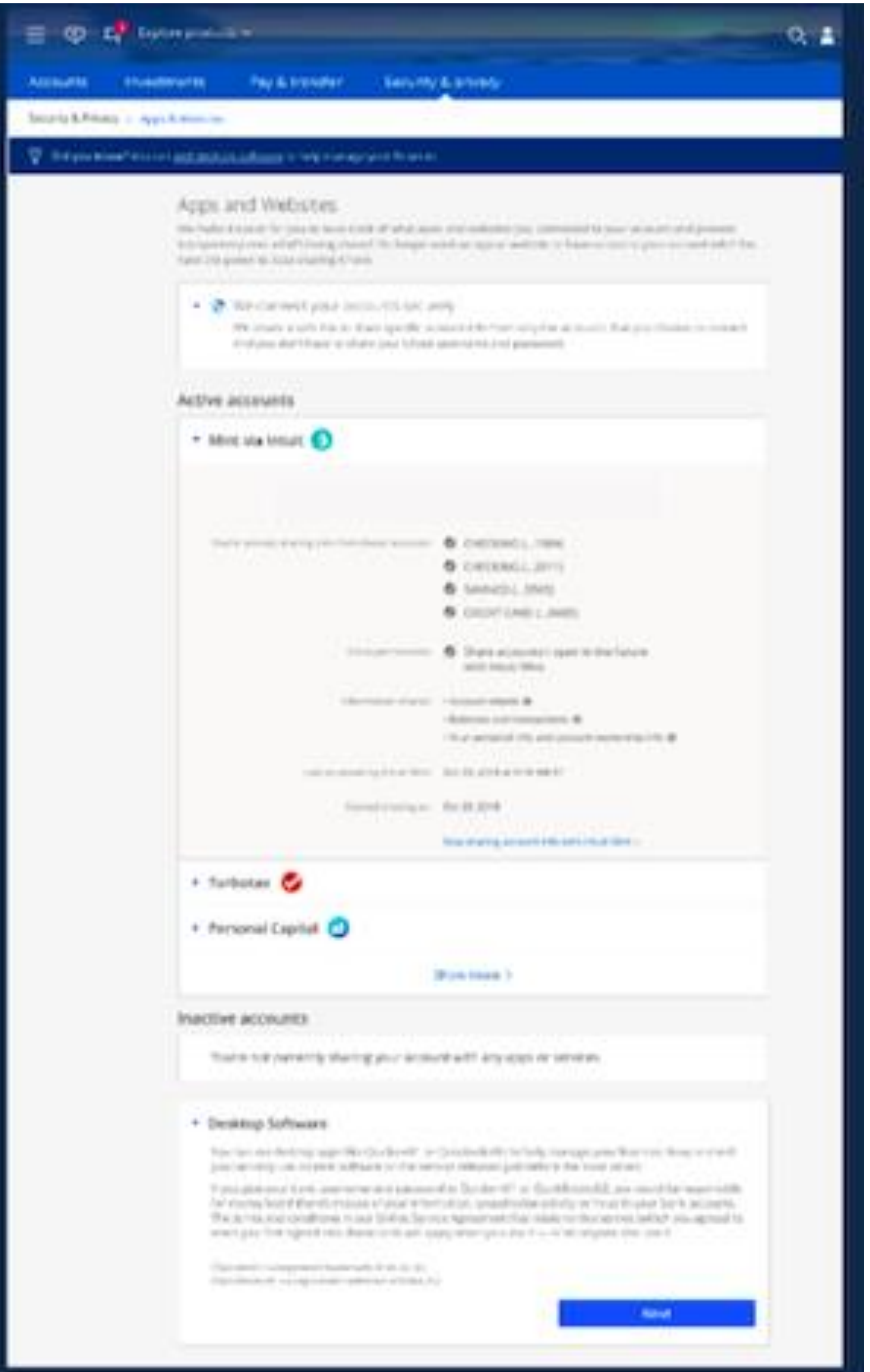
Comprehension of tile

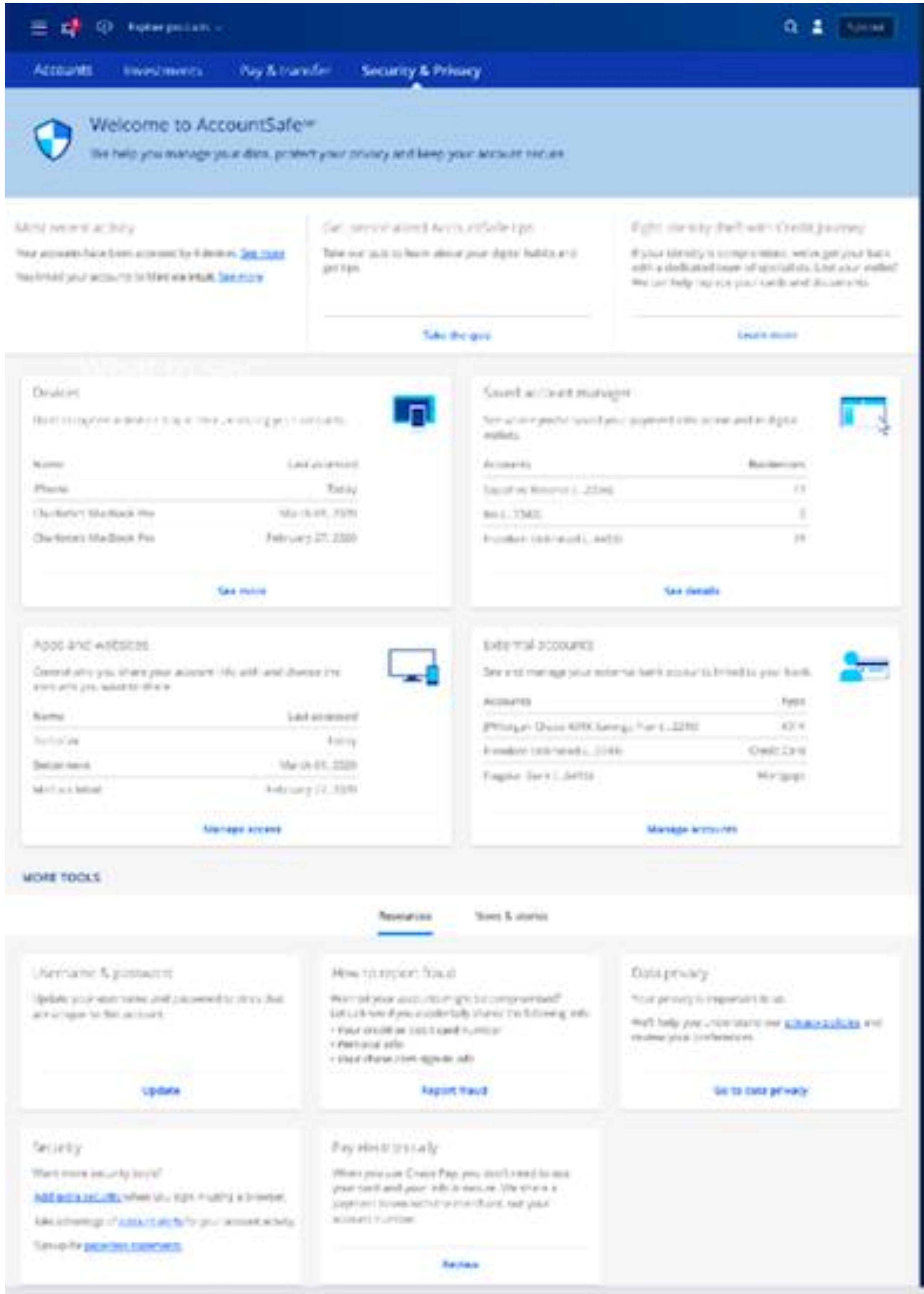
Fairly good understanding that account linkage to apps/sites are managed here, though almost none had heard of Mint or Betterment. Clicking through to details page helped.

Some thought there were only 3 apps as displayed on main tile.

Further clarification needed on details page

- Stop Sharing link was undiscoverable to a third of participants. Users expected to find a delete button at top of each listed app rather than on lower section.
- 'Extra permissions' assumed share with people.
- What level of access can be shared?
- Checkmarks assumed radio control buttons.
- 'We connect your accounts securely' looks like an ad; explanation needs clarification.
- Can add or edit names of apps or merchant businesses to increase recognition?





AccountSafe Iteration

CPO Prototype v1

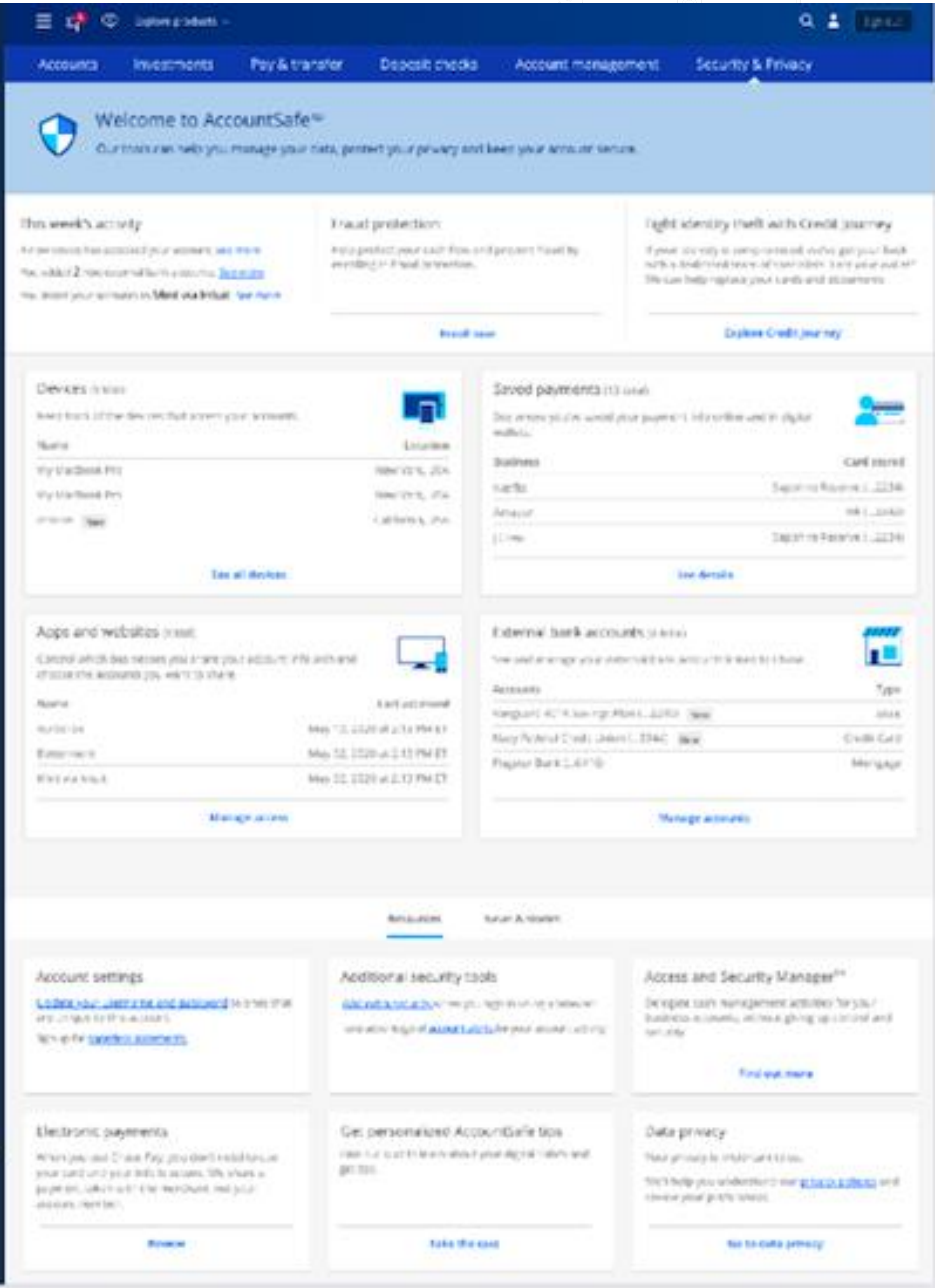
Rapid iterations improved:

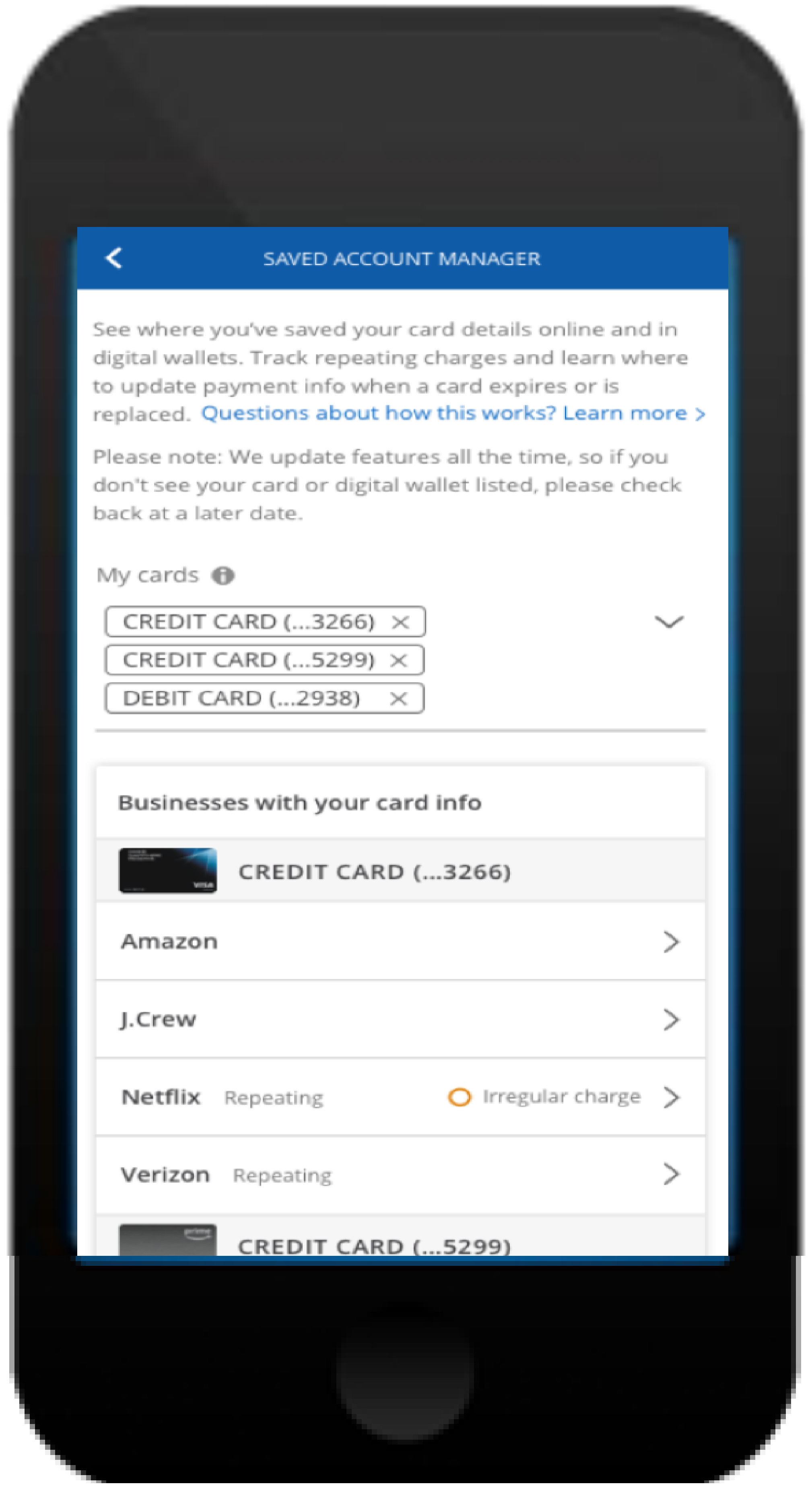
- Statement of offerings (hero)
- Relevance of engagement triplet
- Better defined timeframe (MRA)
- Readability (tile headers)
- Cognitive load (total count added)
- Location highlights (Device tile)
- Tags to flag "new" activity
- Extra headings removed (More Tools)
- Visuals (iconography)

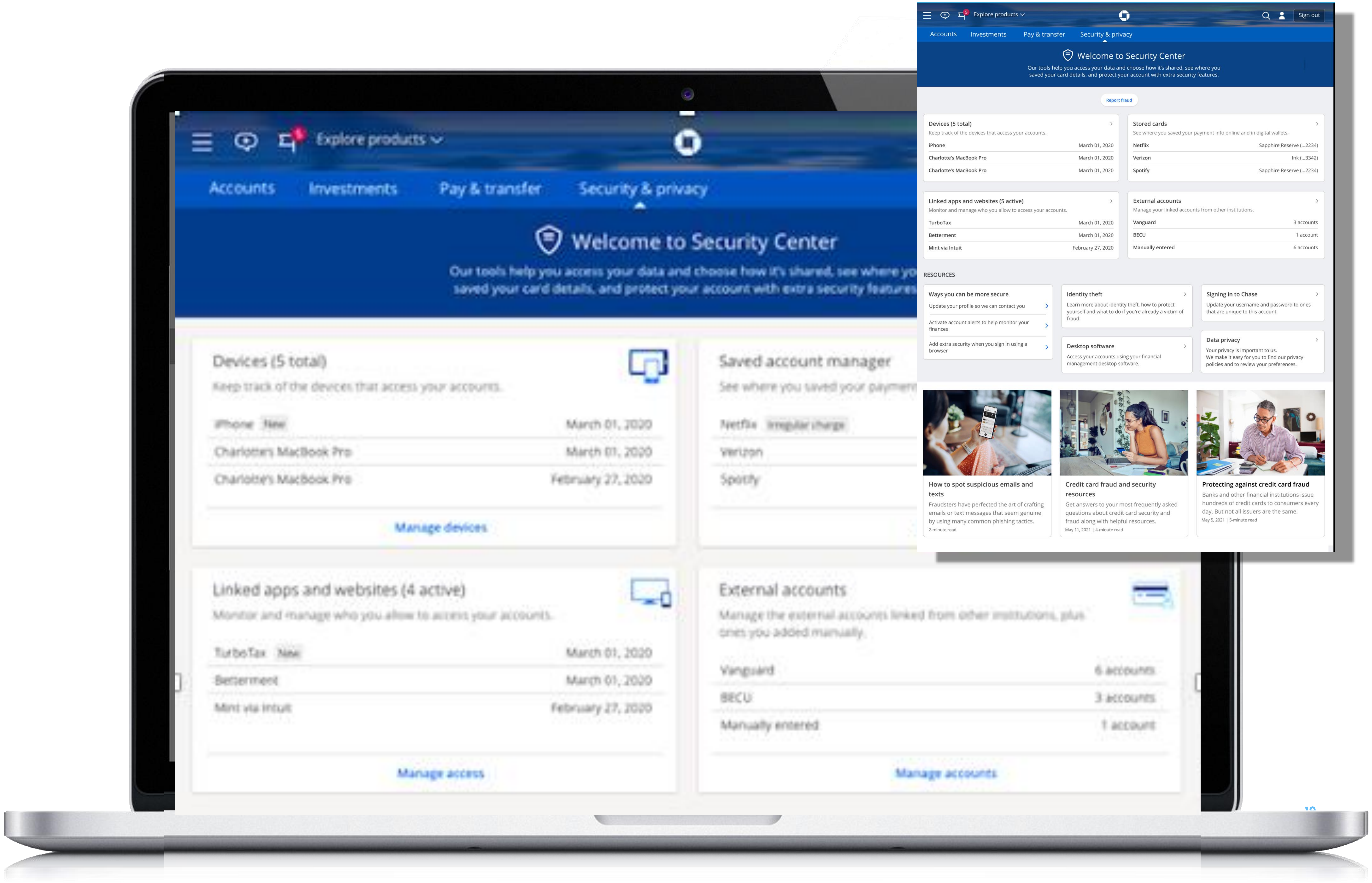
Further explorations in:

- Alternate headings for SAM
- Order of tile layouts
- Secondary tile layouts (resources)
- Alternate CTA - action focused

Iterated Prototype CBO

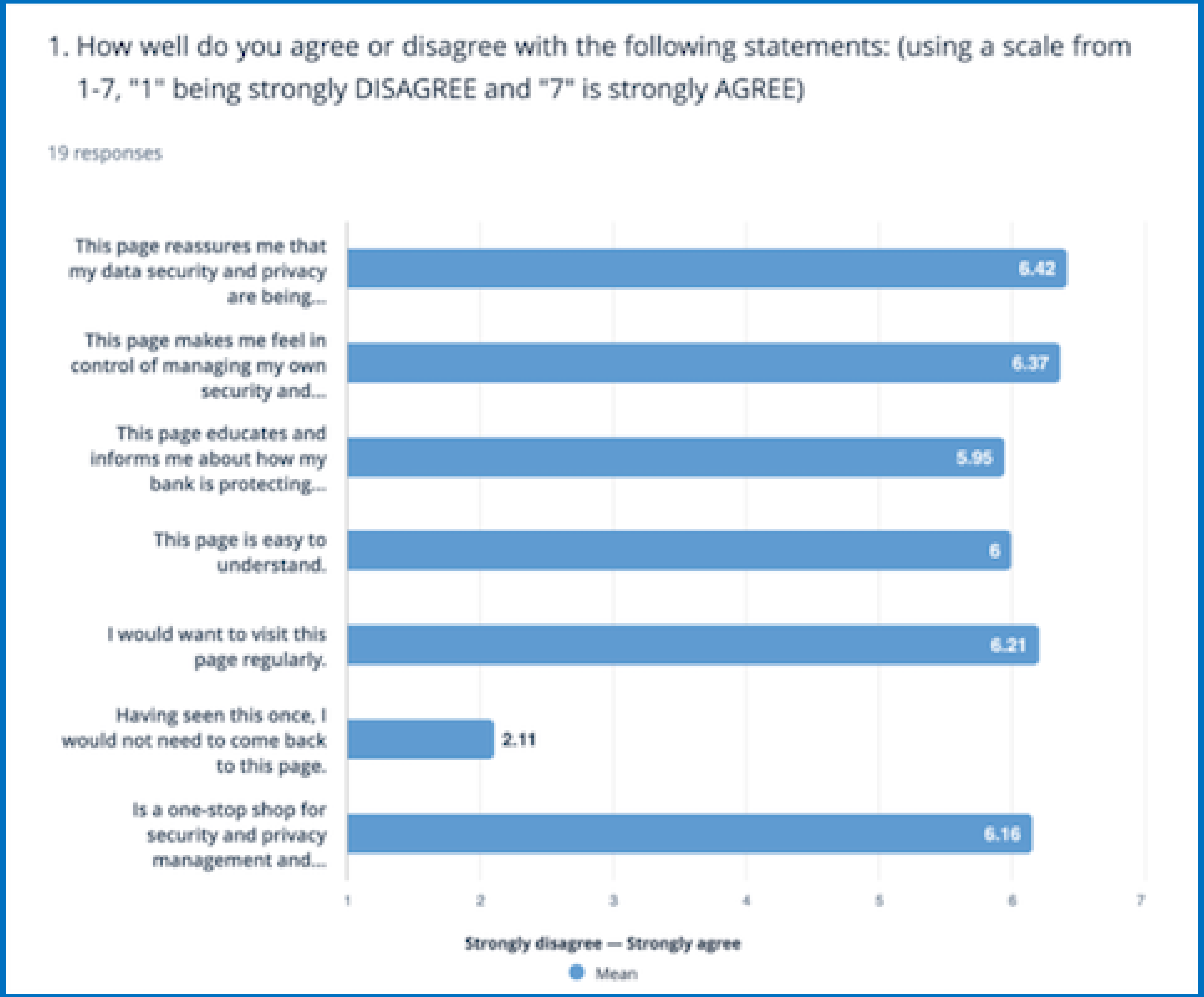



SAVED ACCOUNT MANAGER
See where you've saved your card details online and in digital wallets. Track repeating charges and learn where to update payment info when a card expires or is replaced. Questions about how this works? Learn more >
Please note: We update features all the time, so if you don't see your card or digital wallet listed, please check back at a later date.
My cards
CREDIT CARD (...3266)
CREDIT CARD (...5299)
DEBIT CARD (...2938)
Businesses with your card info
CREDIT CARD (...3266)
Amazon
J.Crew
Netflix Repeating
Irregular charge
Verizon Repeating
CREDIT CARD (...5299)


Explore products
Accounts
Investments
Pay & transfer
Security & privacy
Welcome to Security Center
Devices (5 total)
Saved account manager
Linked apps and websites (4 active)
External accounts
Manage devices
Manage access
Manage accounts
Explore products
Sign out
Accounts
Investments
Pay & transfer
Security & privacy
Welcome to Security Center
Our tools help you access your data and choose how it's shared, see where you saved your card details, and protect your account with extra security features.
Report fraud
Devices (5 total)
Keep track of the devices that access your accounts.
iPhone March 01, 2020
Charlotte's MacBook Pro March 01, 2020
Charlotte's MacBook Pro March 01, 2020
Stored cards
See where you saved your payment info online and in digital wallets.
Netflix Sapphire Reserve (...2234)
Verizon Ink (...3342)
Spotify Sapphire Reserve (...2234)
Linked apps and websites (5 active)
Monitor and manage who you allow to access your accounts.
TurboTax March 01, 2020
Betterment March 01, 2020
Mint via Intuit February 27, 2020
External accounts
Manage your linked accounts from other institutions.
Vanguard 3 accounts
BECU 1 account
Manually entered 6 accounts
RESOURCES
Ways you can be more secure
Update your profile so we can contact you
Activate account alerts to help monitor your finances
Add extra security when you sign in using a browser
Identity theft
Learn more about identity theft, how to protect yourself and what to do if you're already a victim of fraud.
Signing in to Chase
Update your username and password to ones that are unique to this account.
Desktop software
Access your accounts using your financial management desktop software.
Data privacy
Your privacy is important to us.
We make it easy for you to find our privacy policies and to review your preferences.
How to spot suspicious emails and texts
Fraudsters have perfected the art of crafting emails or text messages that seem genuine by using many common phishing tactics.
2-minute read
Credit card fraud and security resources
Get answers to your most frequently asked questions about credit card security and fraud along with helpful resources.
May 11, 2021 | 4-minute read
Protecting against credit card fraud
Banks and other financial institutions issue hundreds of credit cards to consumers every day. But not all issuers are the same.
May 5, 2021 | 5-minute read

Final Designs

Research showed users desire to visit often the page and we received high ratings on how they valued the features.



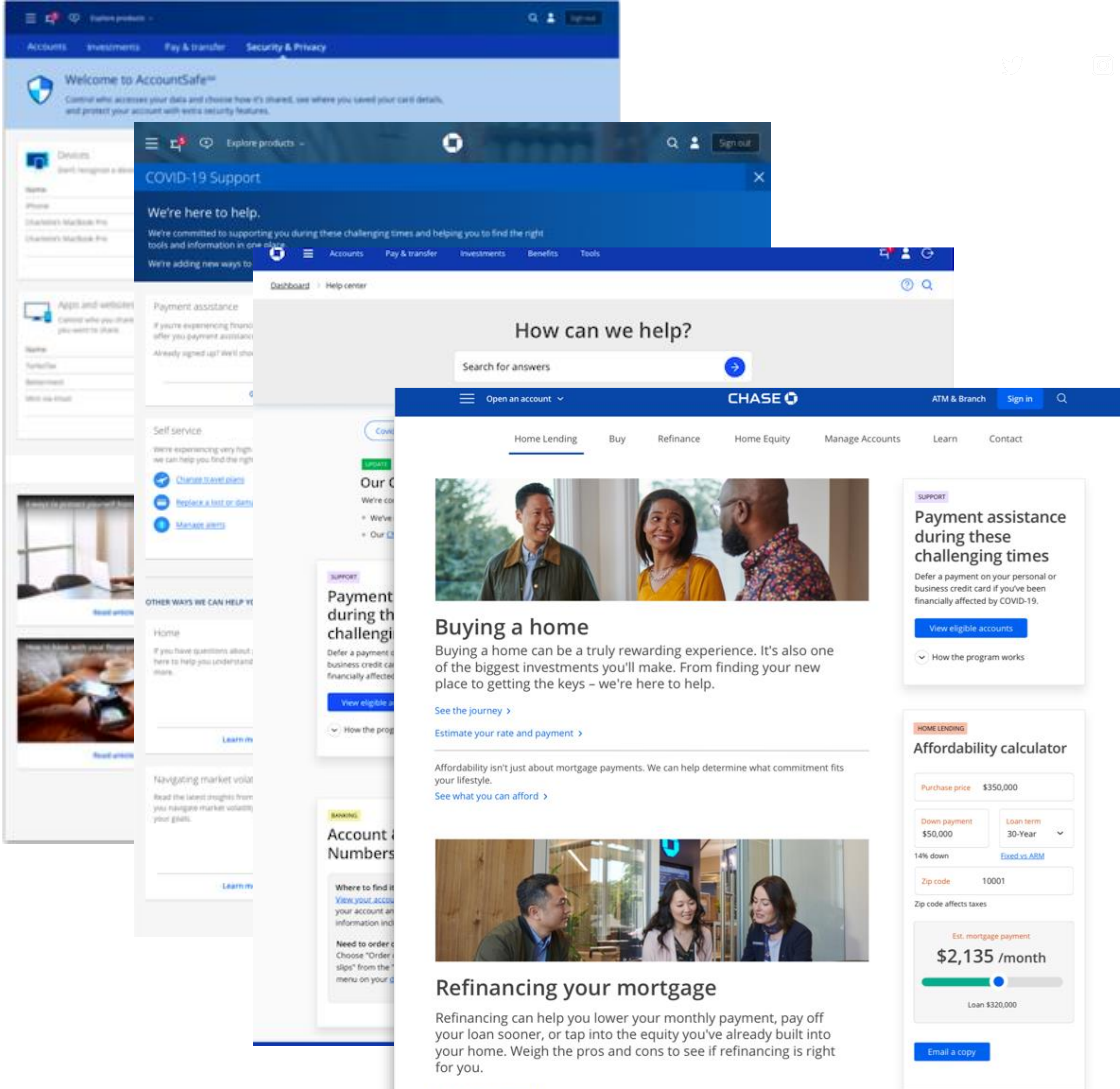
Results

Chase was rated #1 by JD Powers in both Web Channels and in the subject of Security in 2020.

When COVID arrived in New York, the call centers were overwhelmed with the branches closing. We were asked to covert our Security hub into a crisis hub in just two weeks.

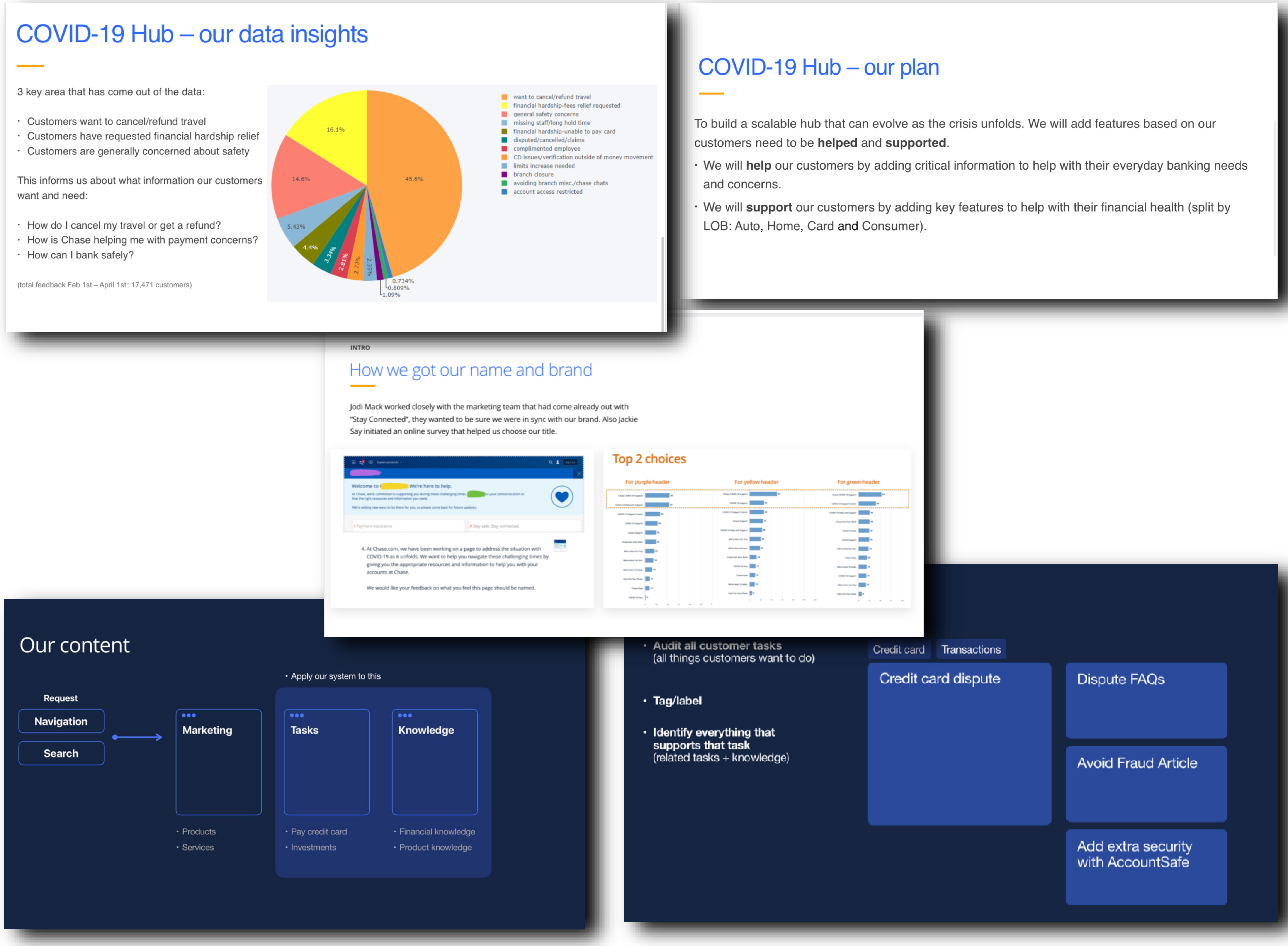
Began evolving the hubs into Help & Support, getting Chase to think more about modular systems, utilizing templates and content management for more re-usability and search capability.

This also inspired a new redesign of all our public pages to utilize the systems as section templates.



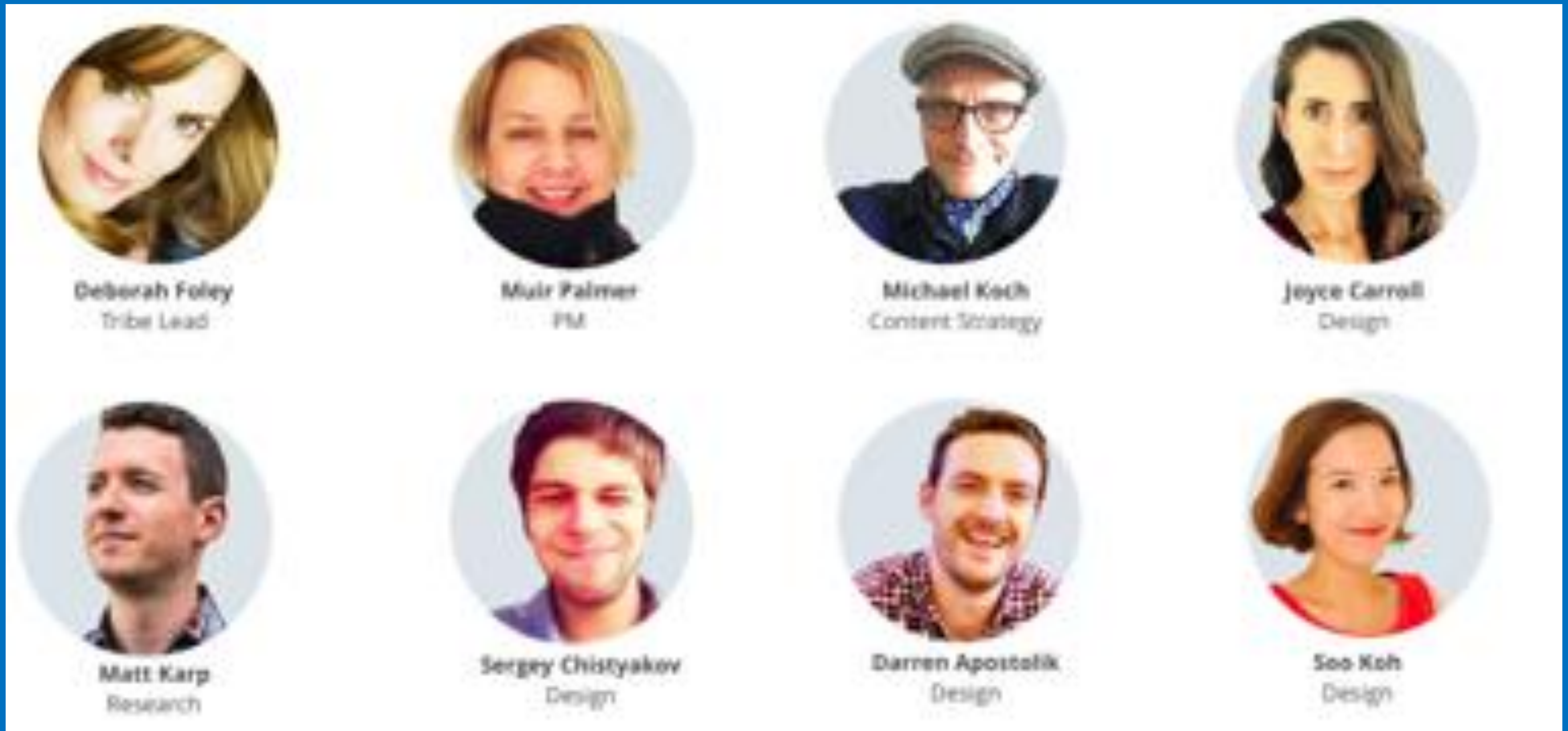
Results

- Both Security Center and the COVID hub were released in the spring of 2020 to 4 million customers.
- Help & Support and the MVP of the public experience followed in the fall of 2021.
- In 2021, JD Powers and Global Banking Magazine rated Chase #1 for Mobile and Digital Channels.
- COVID-19 Support hub was mentioned in all reports on how well this digital hub responded to the crisis.



Developer Ecosystems

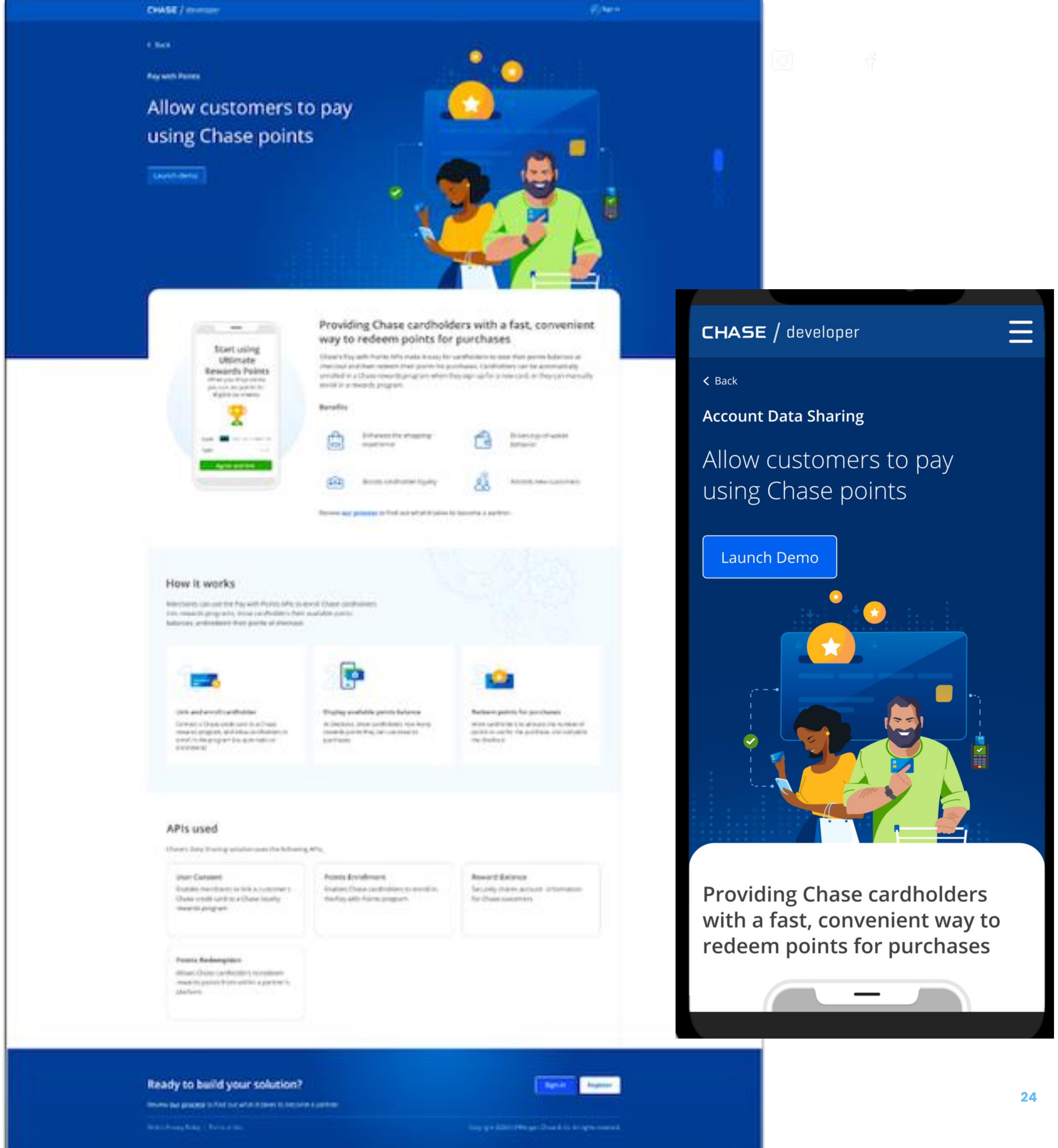
API Management and what makes a great developer experience.



Final 2021 - New look and feel

Chase developer August analysis

31 Partners	**109** External developers
20 External APIs	**668** Internal APIs
24K Total visits	**A** Average API score

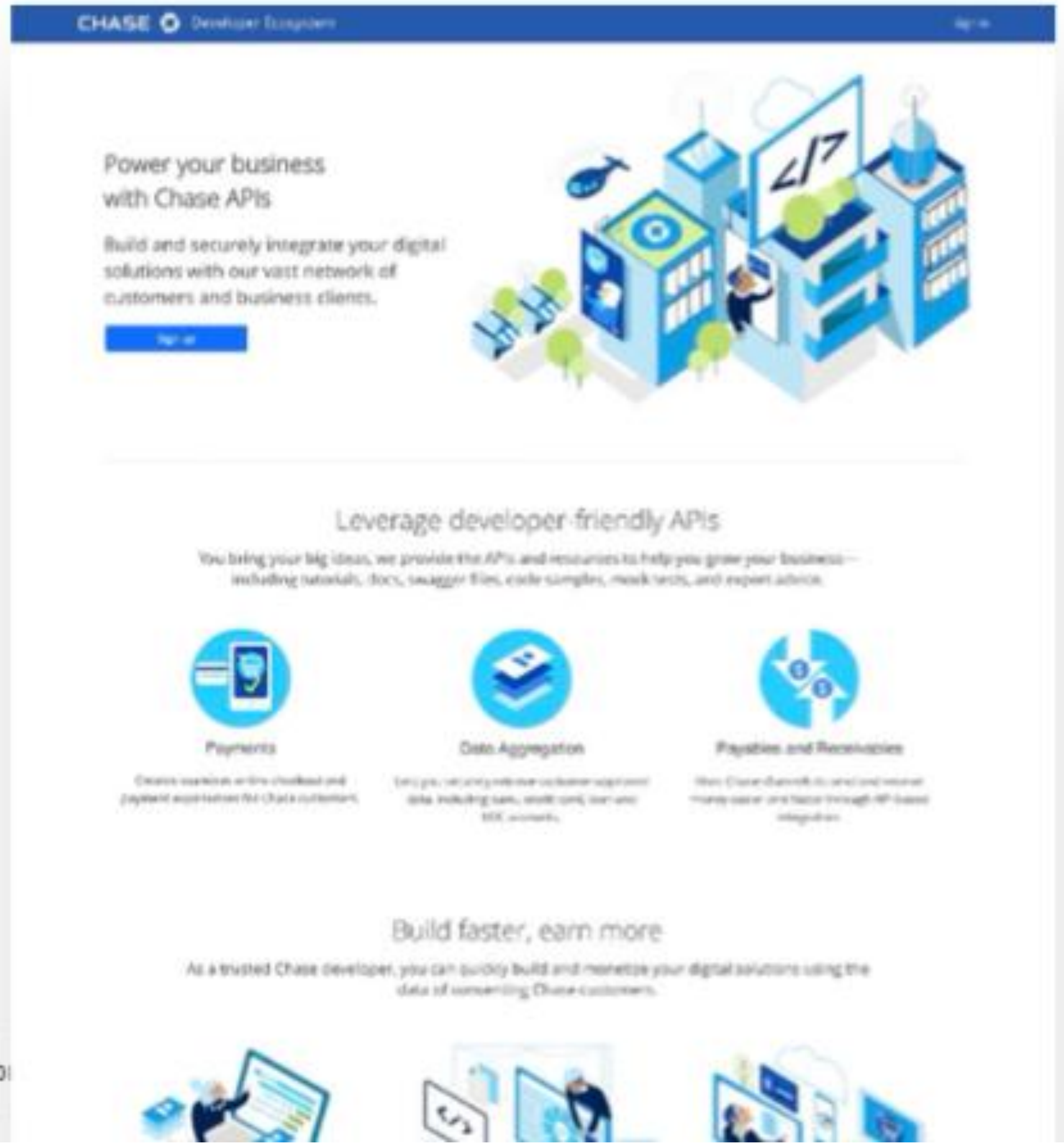


Our API landscape

Three sites. Different target audiences. Different stages of evolution.

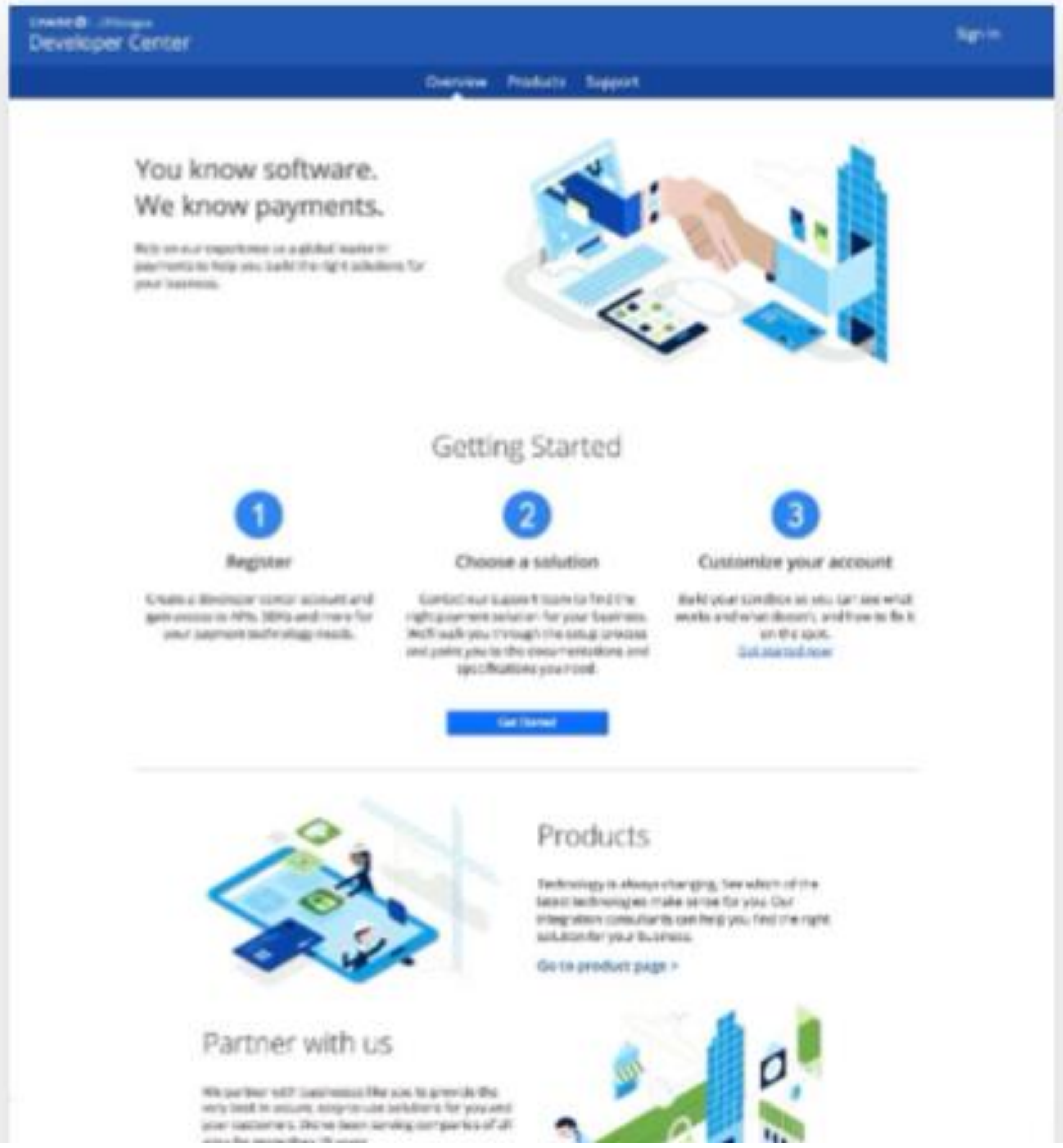
Chase Developer *aka DevEco* (launched 2018)

Consumer Banking



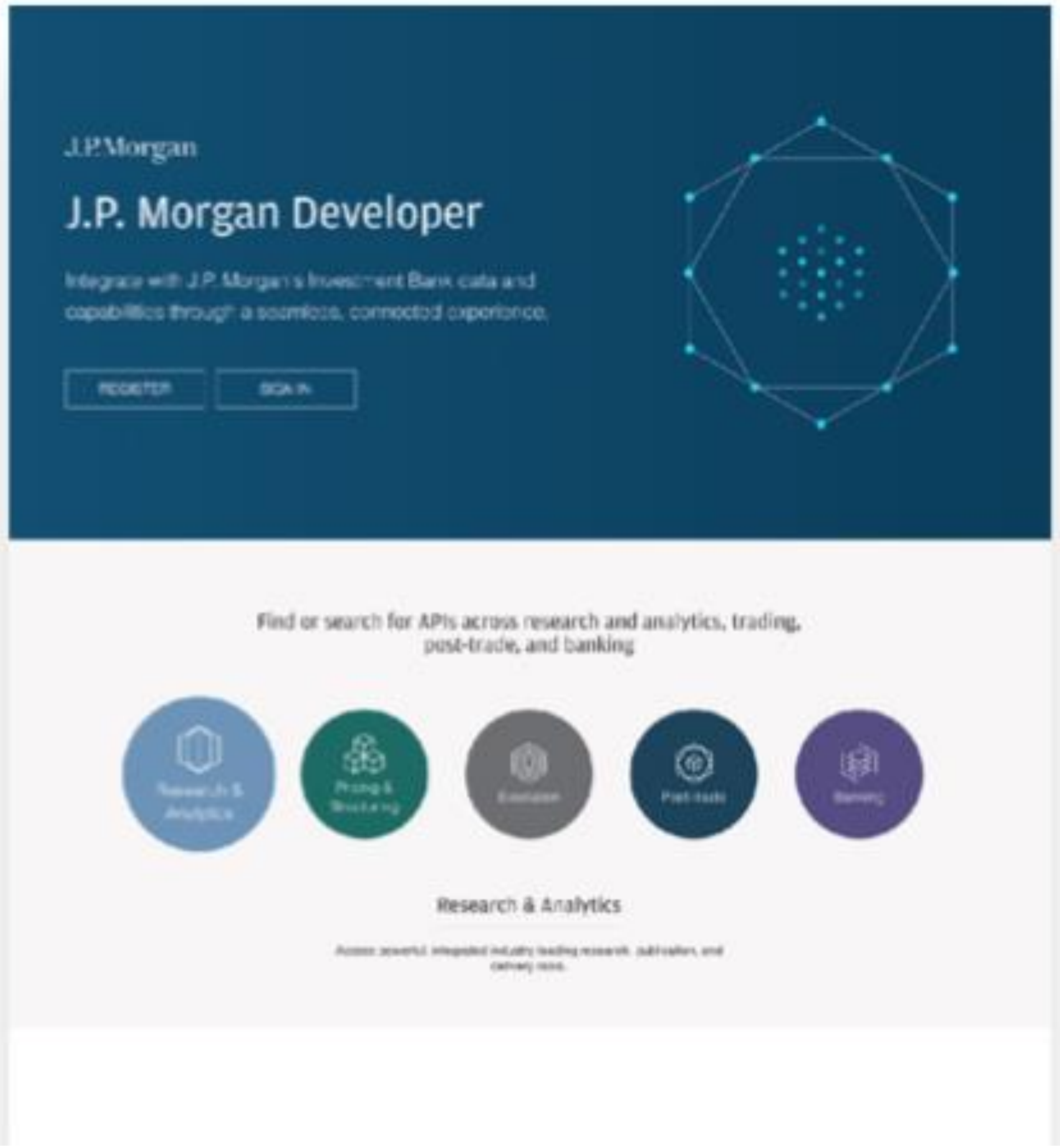
Developer Center *aka DevCenter* (launched 2013)

Merchant Services Banking



JPMorgan Developer (launched 2017)

Investment Banking



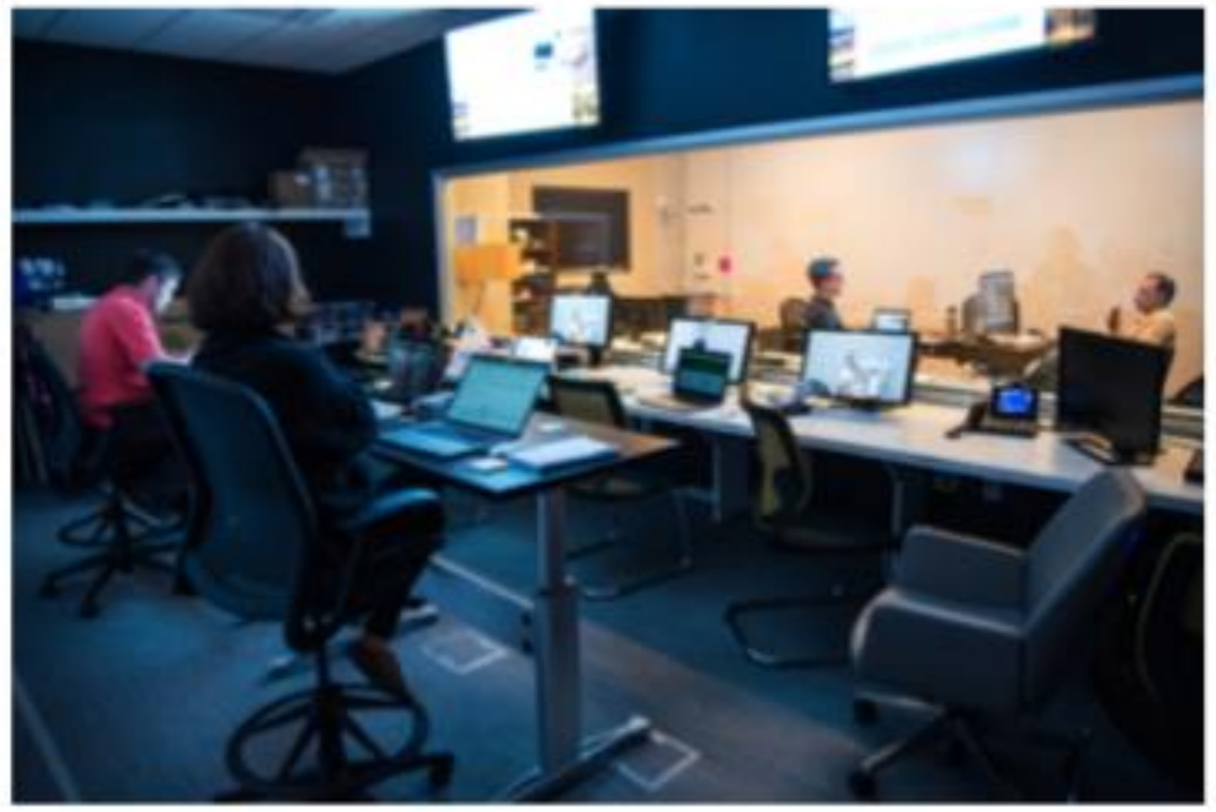
We're learning a lot about developers

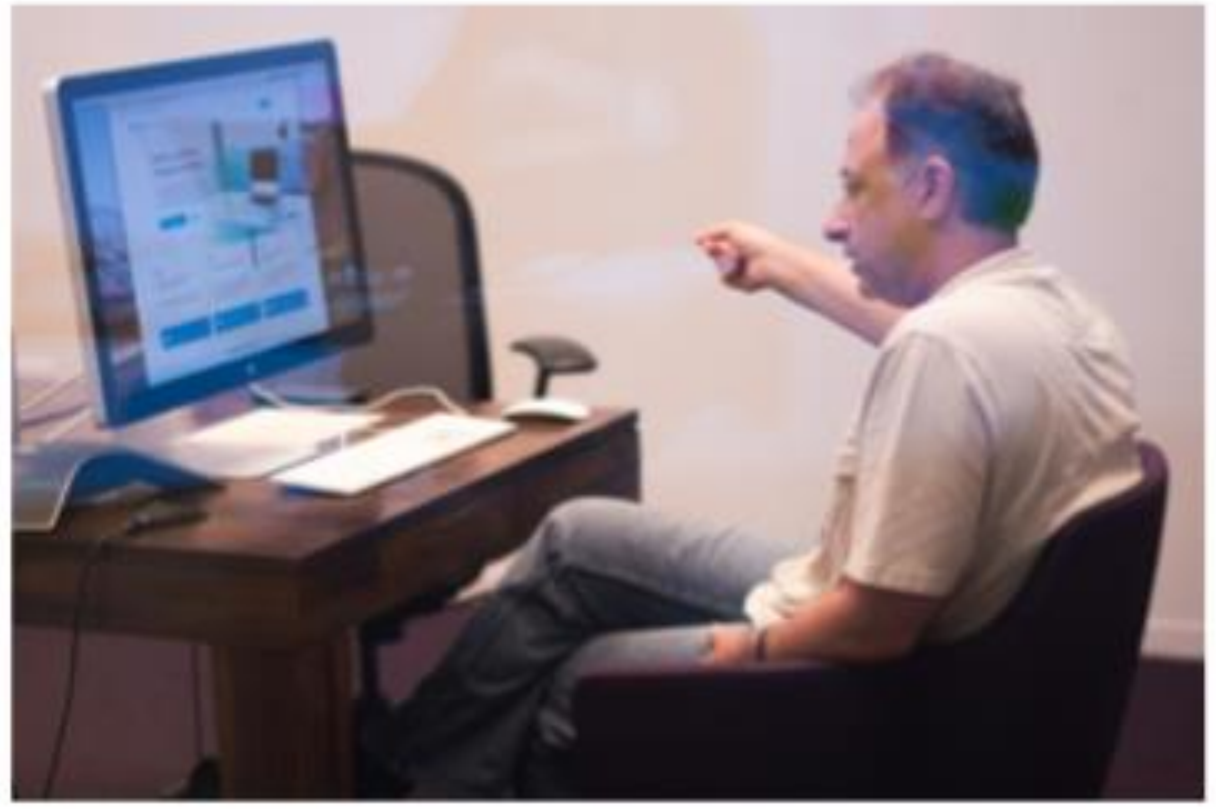
Research is a critical component of our process.

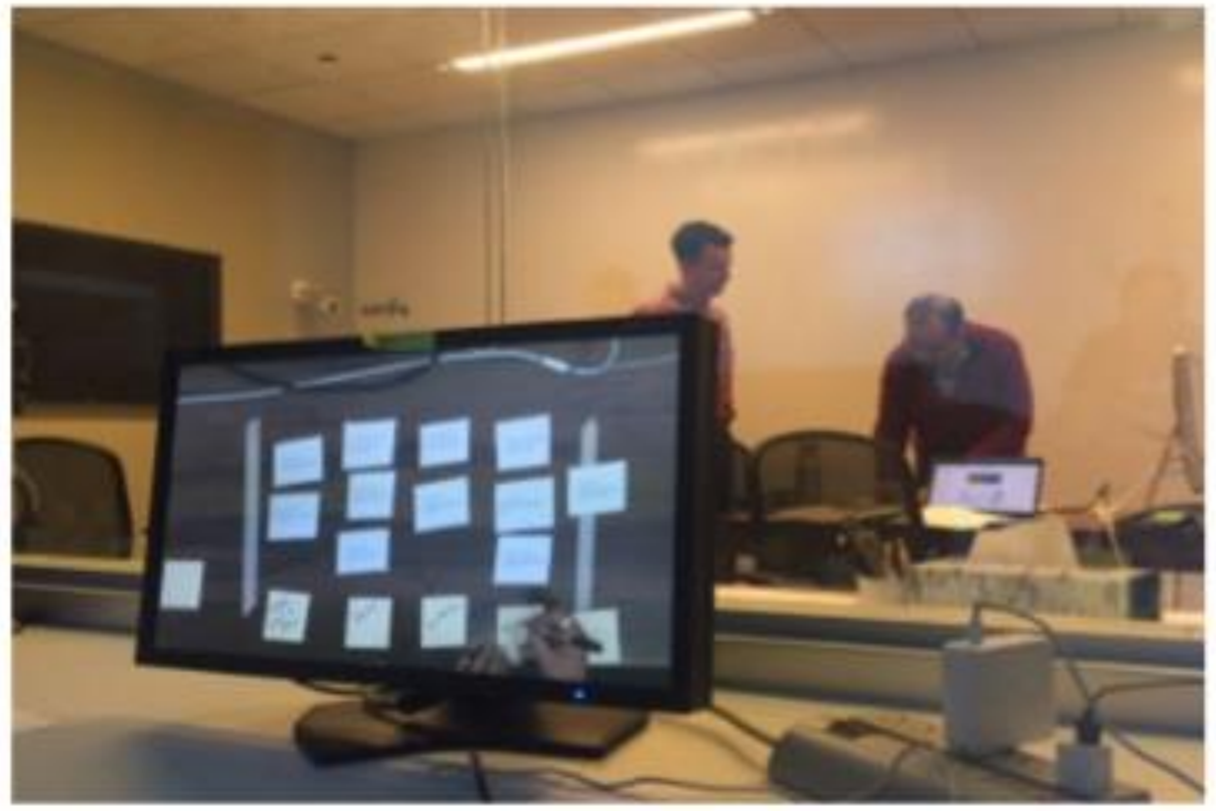
We're building a solid understanding of how our target users work, interact, and consume information, in addition to what they expect from an API platform.

We find ourselves in a unique place for conducting research with the firm: we're designing for both internal and external users outside the "traditional" banking or financial spaces.

That said...







Customer Journeys

Partner Tech Lead - New User

Goals: Find out what API's are available, what is the cost?

	Discover	Explore	Implement
MVP	Emailed Client invitation Search Engine Chase.com Ecosystem Landing Single LOB page	Locate Information Available API's Security Assurance Help/Support/FAQ's "Up-to-date" versioned documentation example code	Send Information to decision makers
VISION	New Third-party partnerships Community FAQ like stack overflow page	Transparency with Pricing Features Benefits to work with us Example Demos Contest of new innovative apps used with our APIs	Help with Marketing new apps using our business assets

Third-party Developer - New User

	Discover	Explore	Implement		
MVP	Search for API's Google search chase.com Stack Overflow Link from tech lead Hackathon ProgrammingWeb	Locate Information Available API's Security Assurance "Up-to-date" versioned docs Programing Languages Getting Started Help/Support/FAQ's	Sign-in/Create Account Complete Application Call Relationship manager Obtain Account API Key Secure Token	Test & Verify API Mock Test	Integration Secure Status Dashboard - Communicatior tool
VISION	Prioritize SEO Tech Blogs Community Manager Developer Evangelist	Pricing Community (Blogs, Forum) Expansion (SDK's, Widgets) Getting Started (Tutorials, Videos) Demo examples	Automate Credential/ Application Process Walkthrough Wizard	Test & Verify Test & Verify Certification Test Data Secure Docs Test Sandbox	Traffic management downloads Project Management Test Case Management Tech Support

Personas

Partner Tech Lead

Jonathan Williams

Age: 43

Job Title: Senior Technical Lead

Development Experience: 15 years

"I need to find the best API solutions for the company that I can trust."

Bio:

Jonathan works with Amex and has been leading tech teams for over 10 years. In his role, he is responsible for staying on the edge of technology, finding new ways to improve the efficiency of his team and improving the products he supports.

Pain Points:

Security is a big concern and working and partnering with a trusted source
Doesn't want to deal with the manual process of a relationship manager.
Finding strong community support of a product with versioning confirming it's stability

Goals:

Needs to quickly and easily understand API products and solutions that are offered and how easily they can be implemented.

JPMC Developer

Jacob

Age: #

Job Title: Developer

Development Experience: # years

"I need find API solutions quickly and have documentation all in one place. "

Bio:

Jacob has been working at chase for about 5 years. He has been assigned to find new innovative ways to create Chase Marketplace apps. He has been learning about Alexa and sees opportunities with JPMChase APIs that may help quickly build out some of his ideas.

Pain Points:

Documentation is in pdf and is not searchable or easy to read.
It's hard to learn who throughout the company is designing APIs that might fit his next solution.
With no example code it is hard to know if this is an easy process to implement

Goals:

- Find step-by-step tutorials, examples, demos, and documentation
- Implement API solutions

Our Audience

We design for a wide range of users, both inside and outside the firm:

Developer (External)	Developer (Internal)	Publisher (Internal)	Governance (Internal)	Relationship Manager (Internal)	Business Owner (External)	Tech Support (Internal)	Global Onboarding (Internal)
Goal: Construct an application that leverages Chase's data.	**Goal:** Construct an application that leverages another group's data/tech.	**Goal:** Make an API available for use by other LOBs/groups within Chase.	**Goal:** Ensure the high quality of JPMC APIs.	**Goal:** Foster business with our external partners and help them on board.	**Goal:** Increase business by partnering with third party tech providers.	**Goal:** Diagnose and direct users' technical support requests.	**Goal:** Usher, verify and orient new users through the JPMC platform.

External titles have included:

Software Engineers

CIOs, Global Heads of IT

Internal titles have included:

Software Engineers
API Product Owners
API Publishers
Administrators
API Strategists
Tech Support

MVP 2018

Login Homepage

Home / Product listing

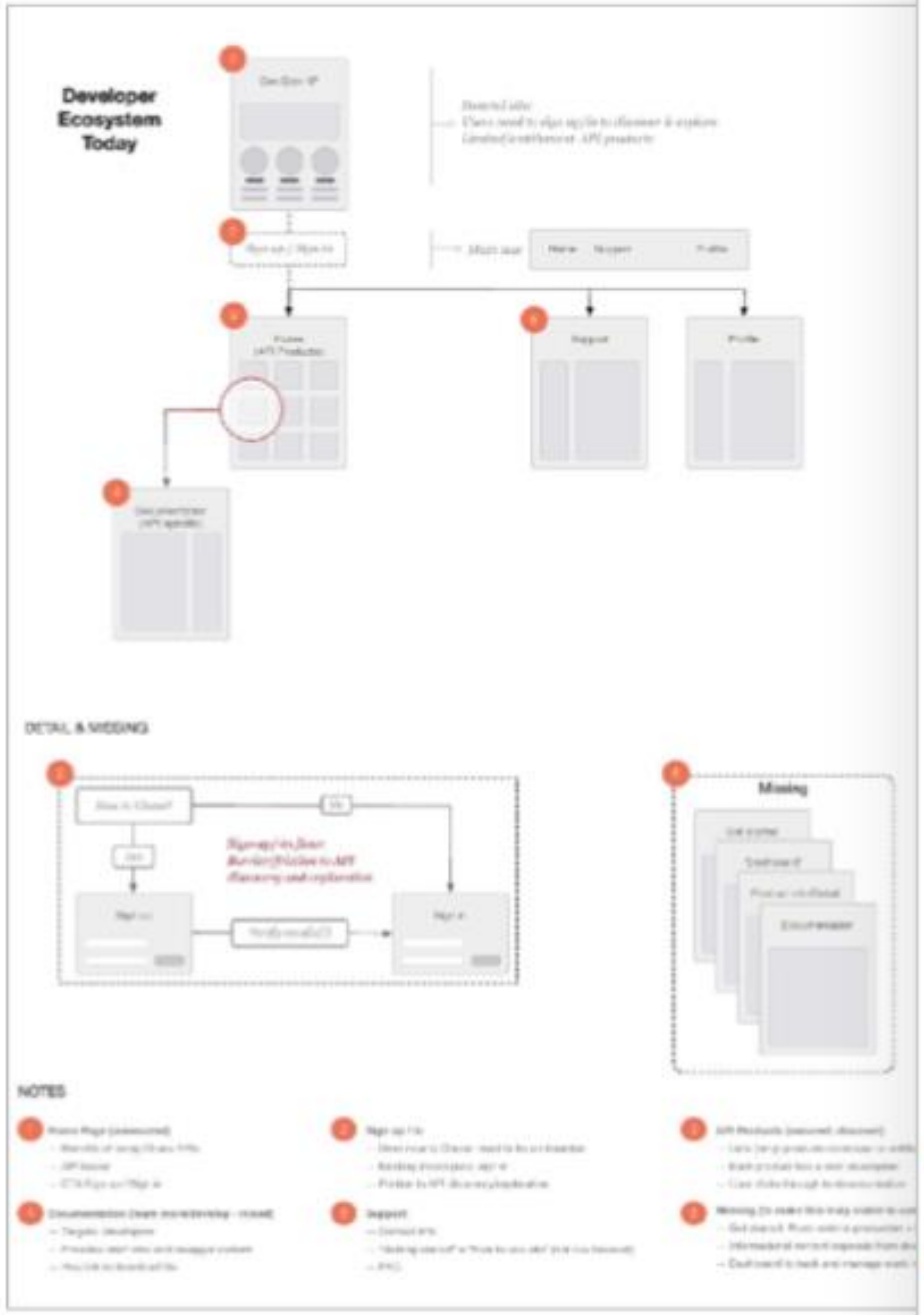
API Swagger file

Goals for 2019

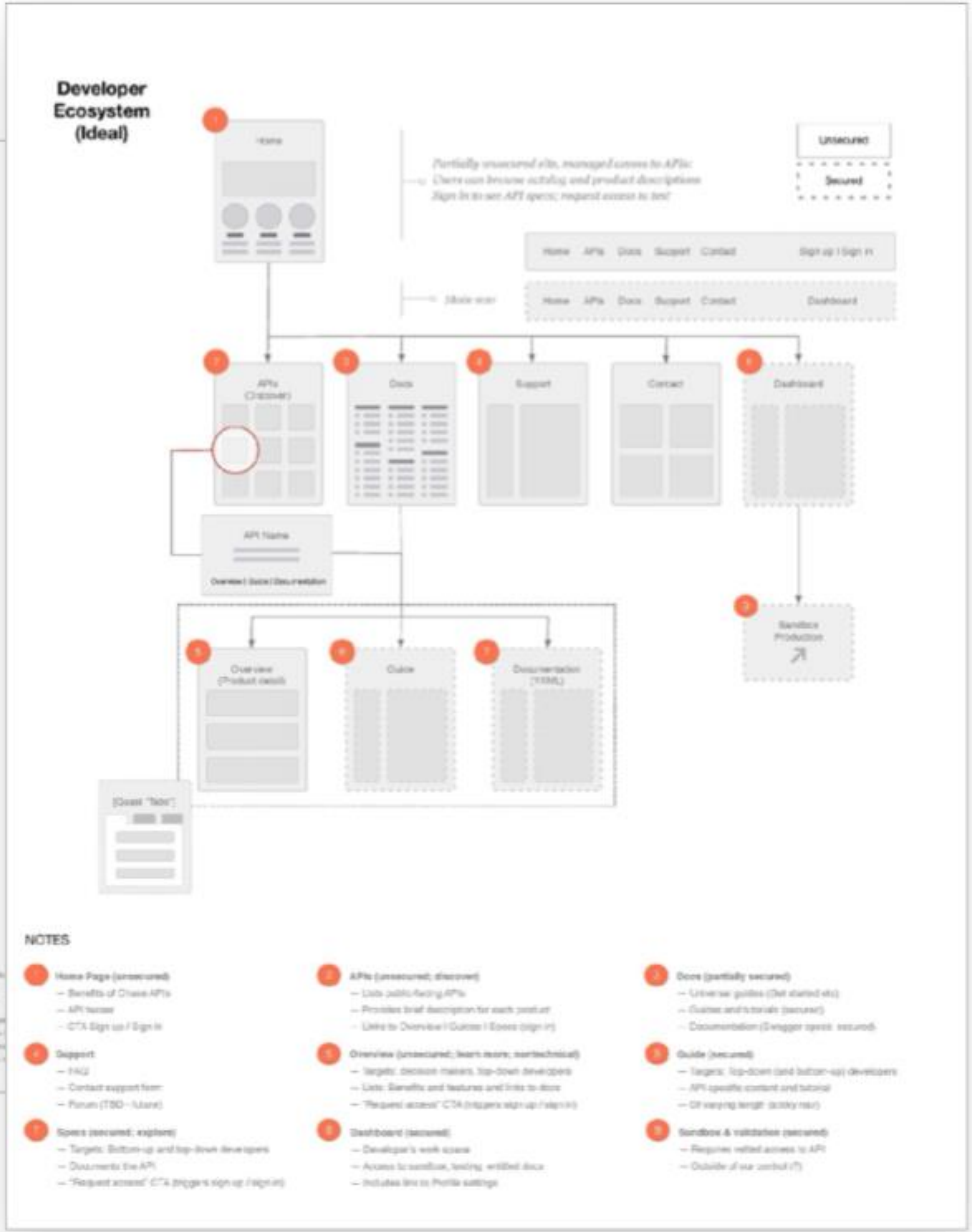
Next Release April 1, 2019

Explorations include:

- Improved Documentation
- API Catalog/Categorization
- Adding a Developer Dashboard
- Improved onboarding through Getting Started Guide
- Notifications
- Improved backend Tools

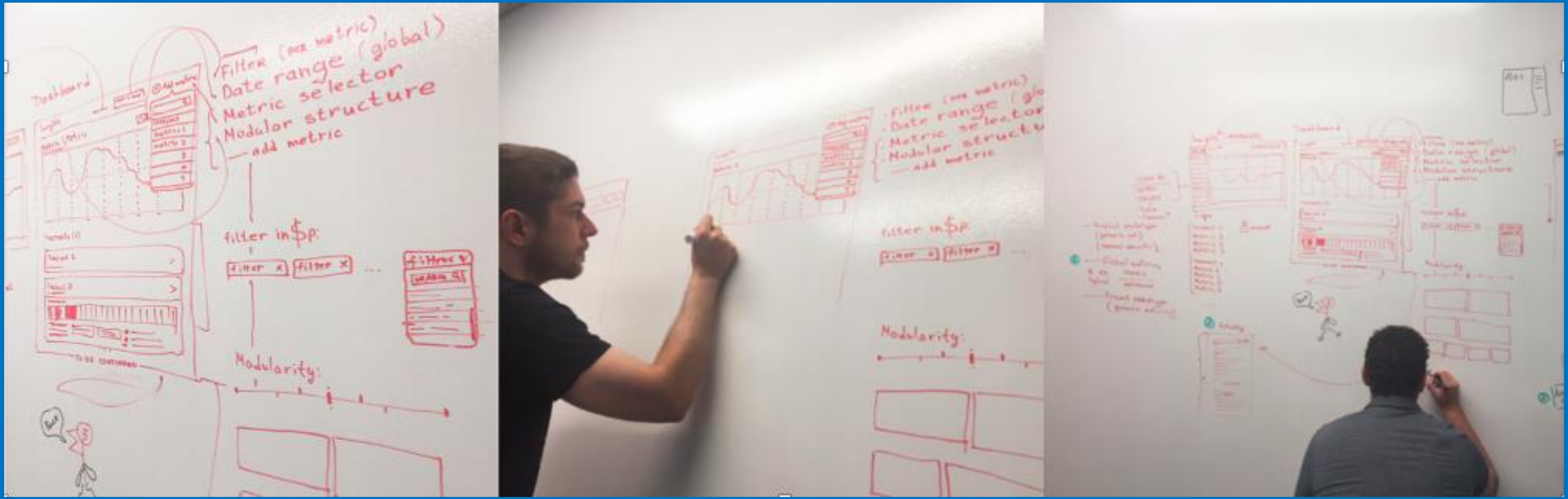


Developer Ecosystem today

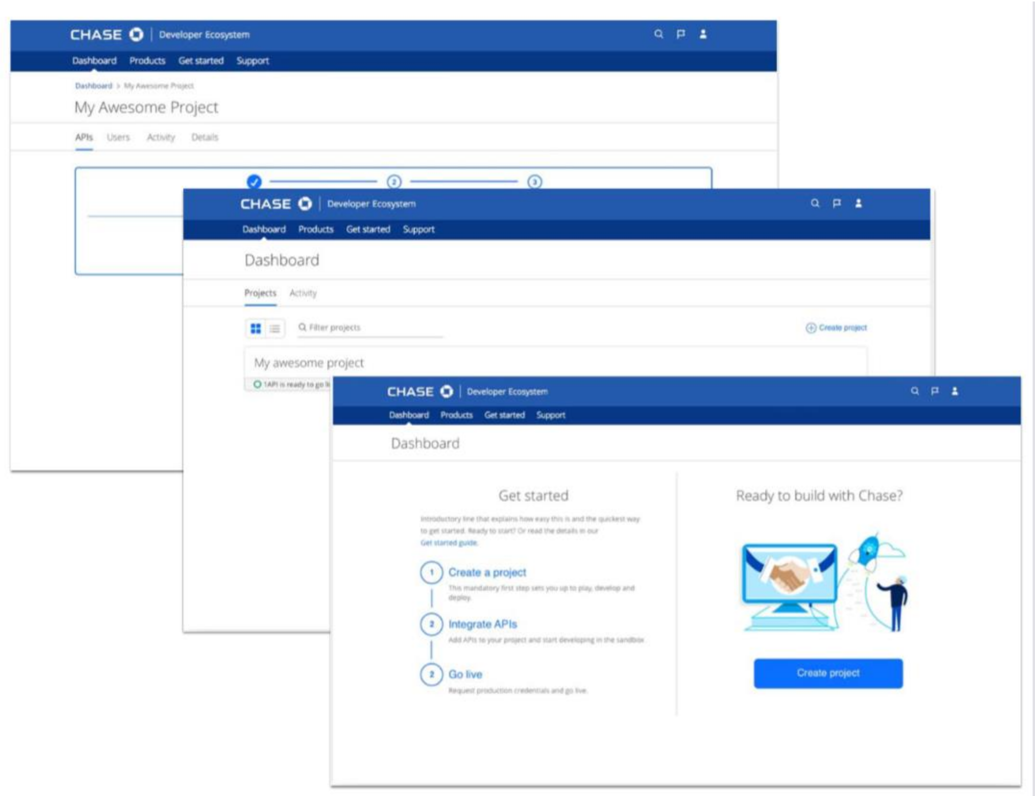


Developer Ecosystem - Vision

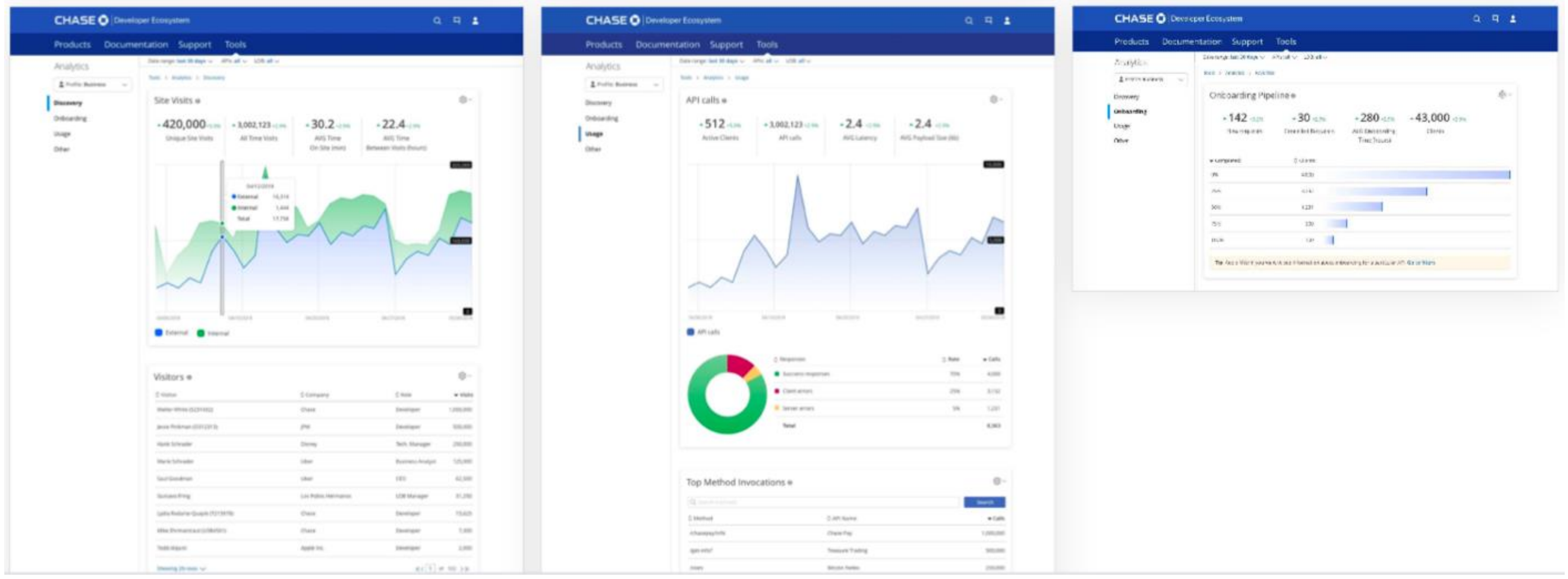
2019 Diversity of skills and projects



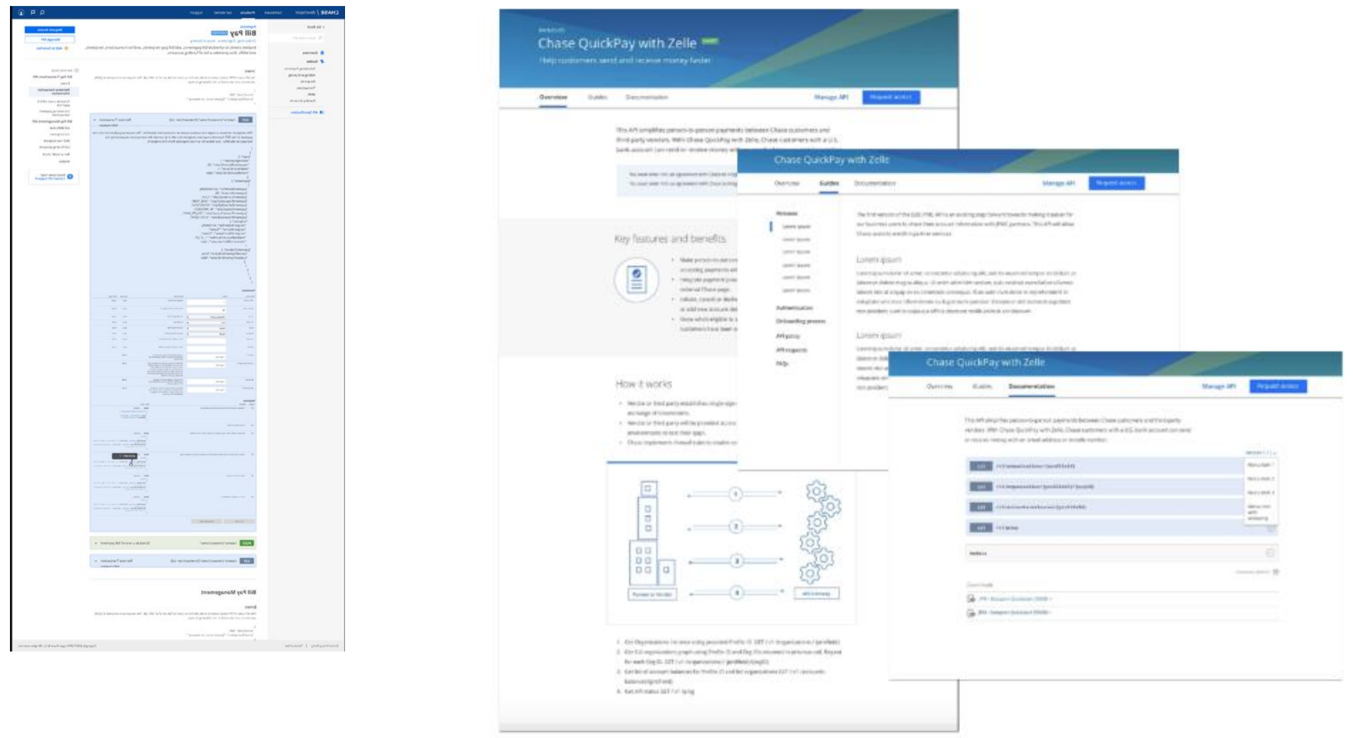
On-boarding partners



Analytics



Marketing vs Guides vs code examples



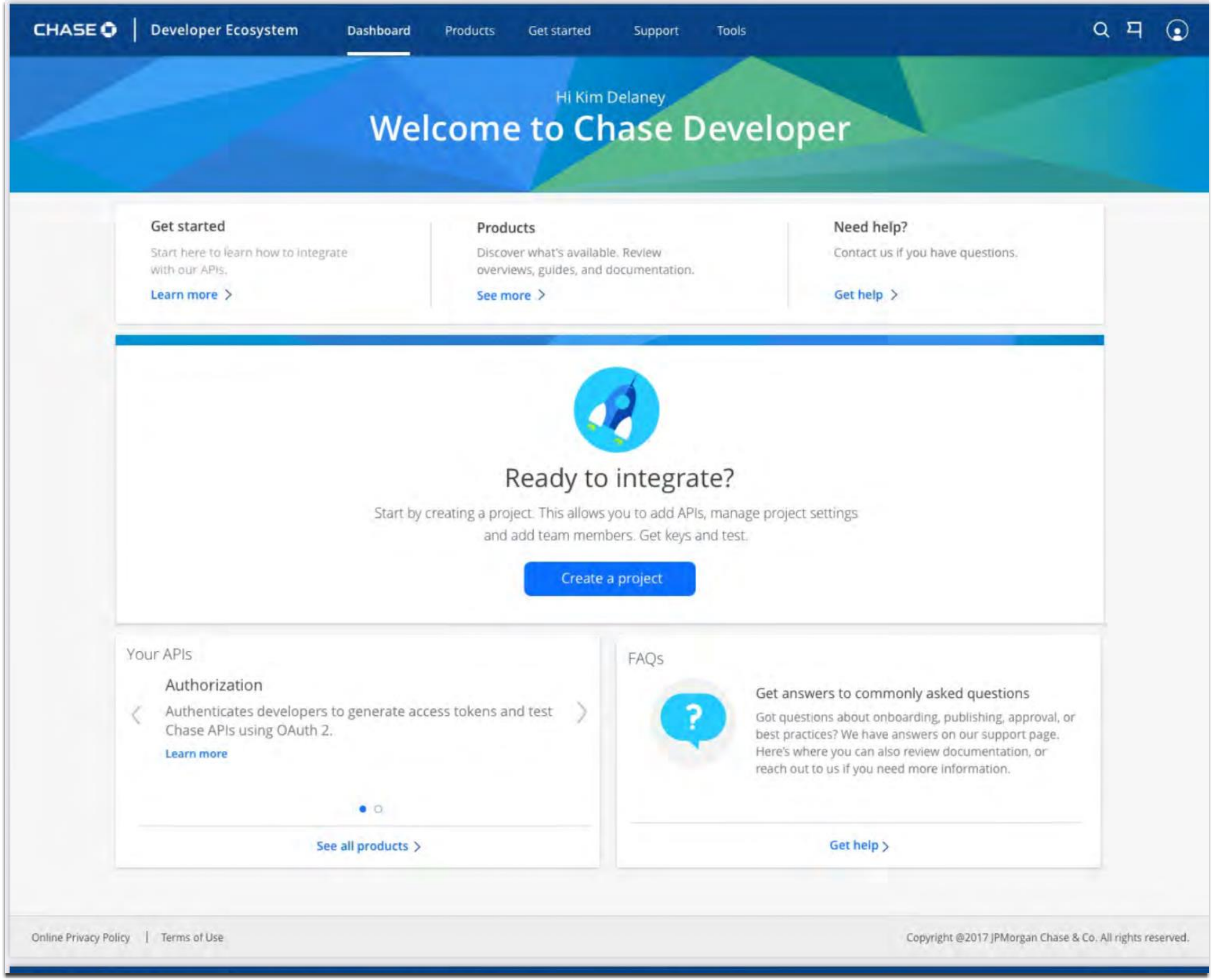
Catalog and Taxonomy

D

2020 Self Service External Partnerships

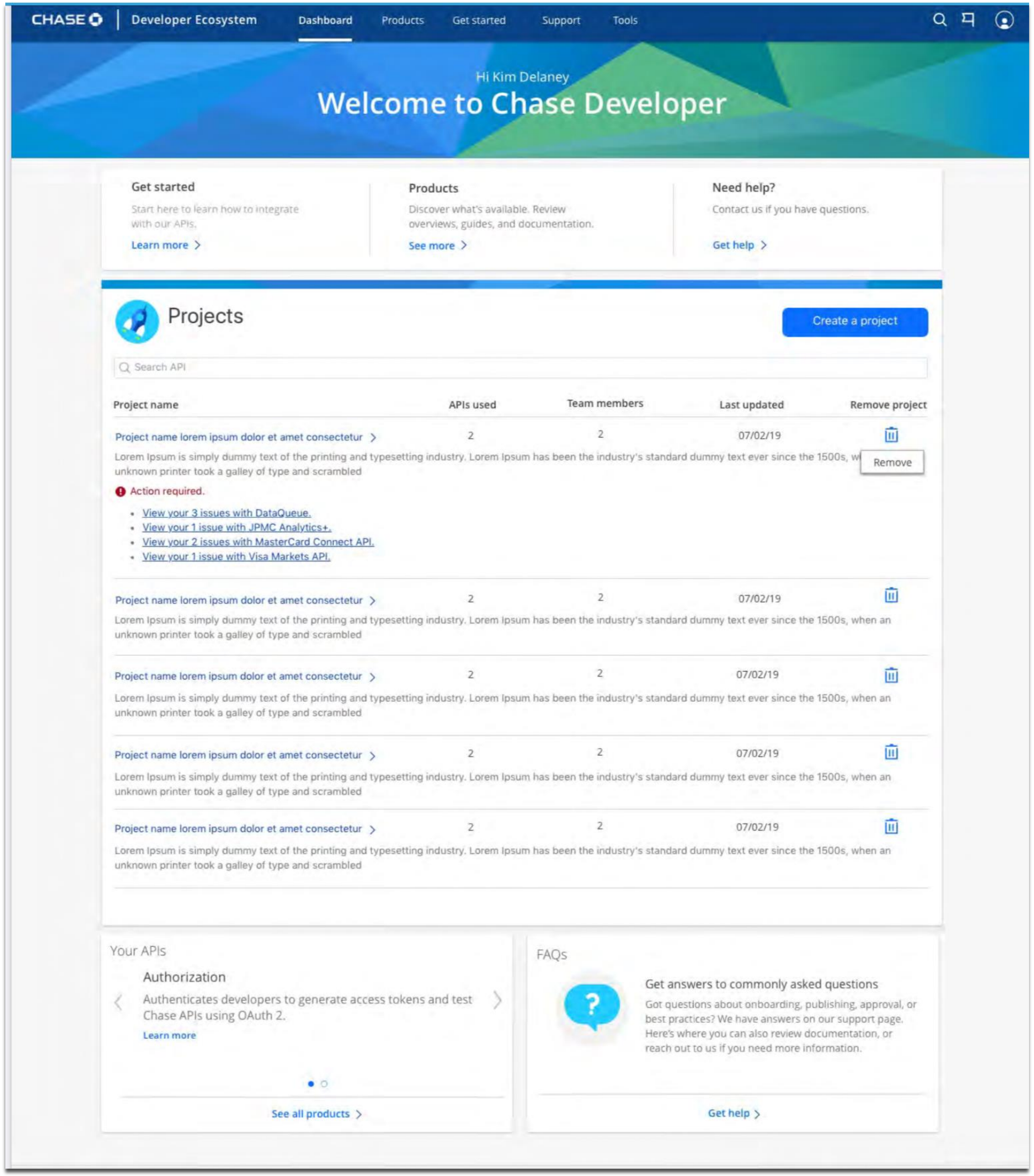
Dashboard landing

Self service communication area when first signed in to help the user know where to start and what to do.



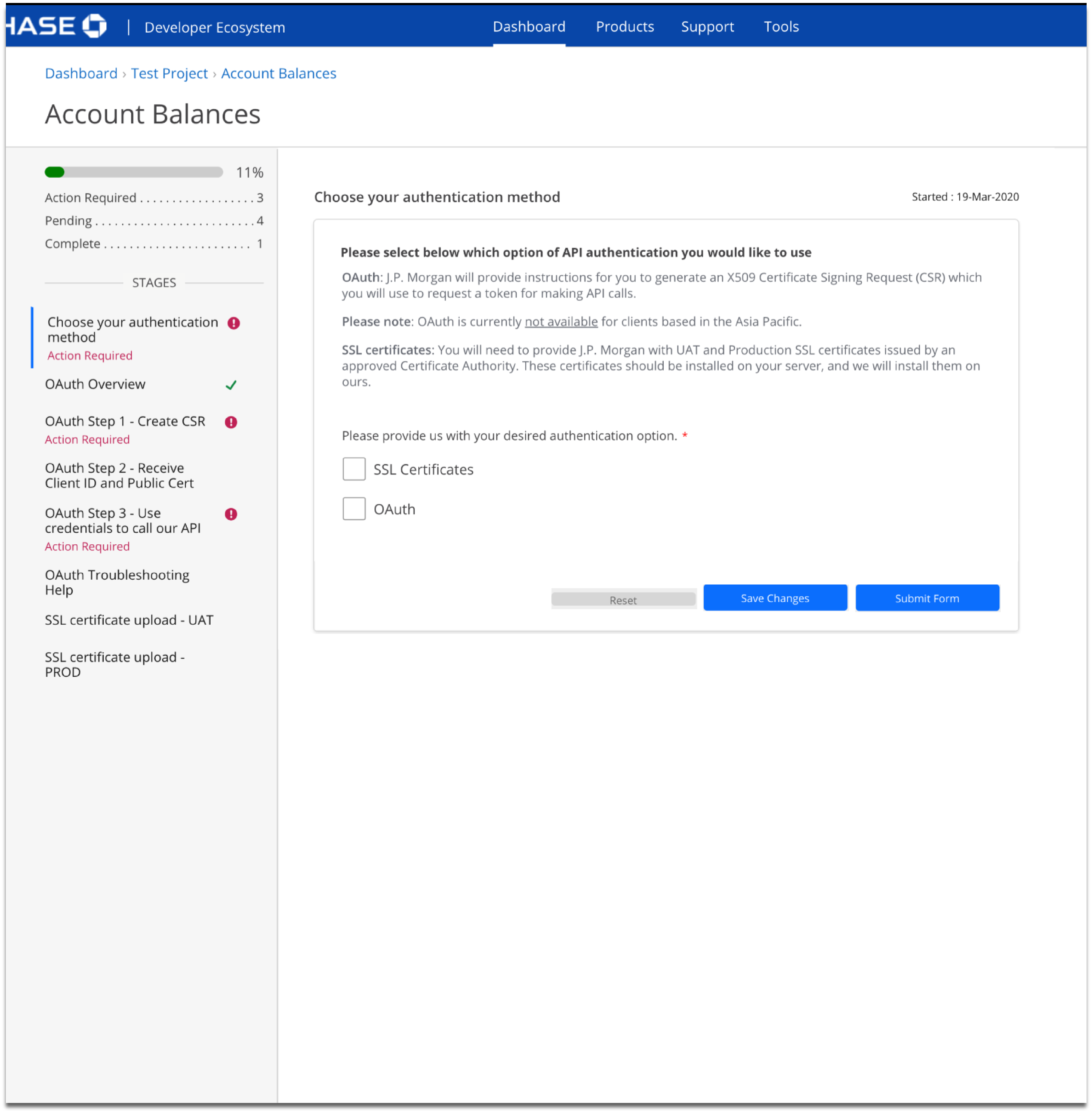
Adding Project

Developer can view their project, add users and APIs and view onboarding requirements.



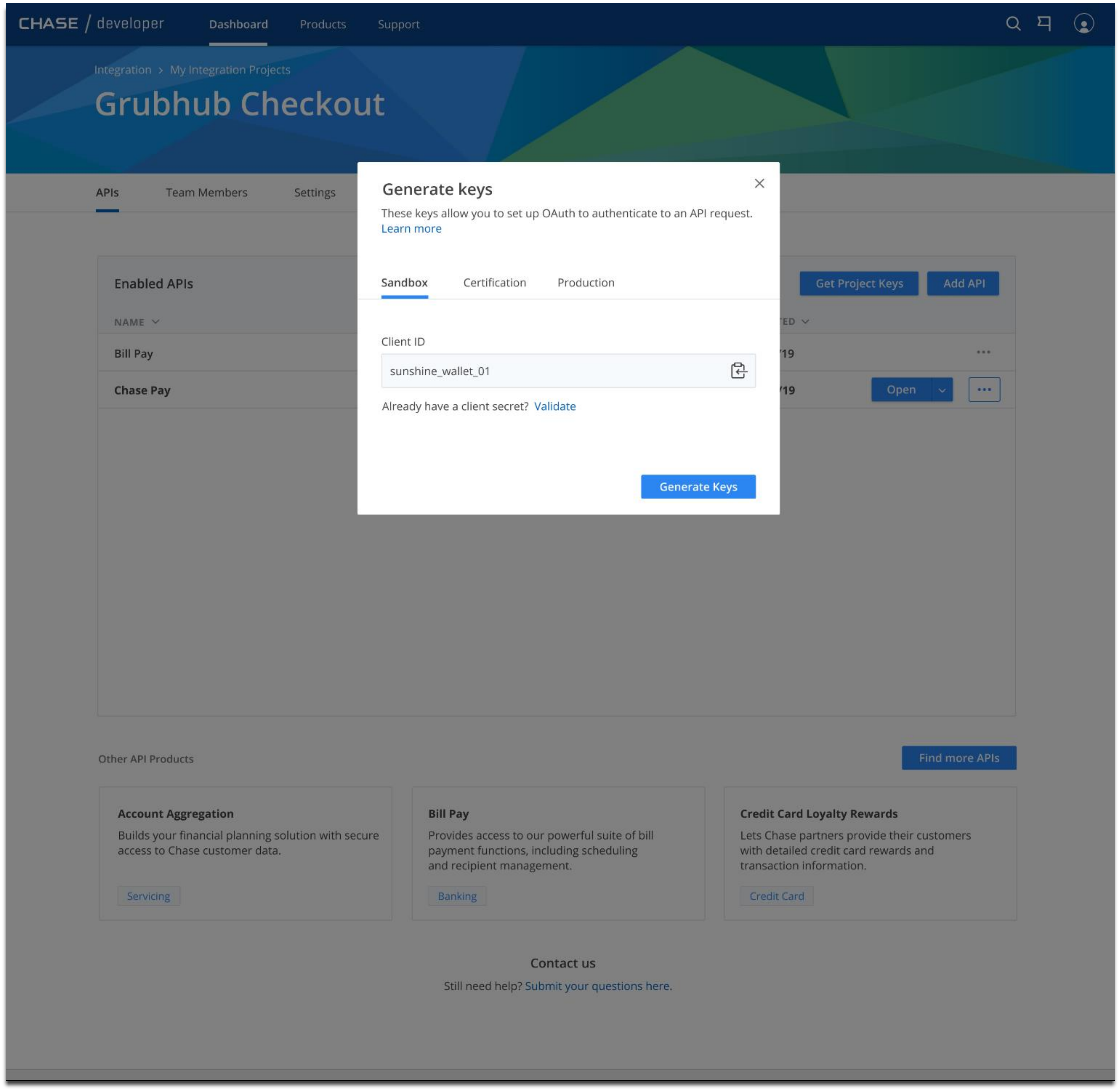
Custom Onboarding requirements

API product owners can use the publisher to create a custom onboarding list of requirements and actions for the user.



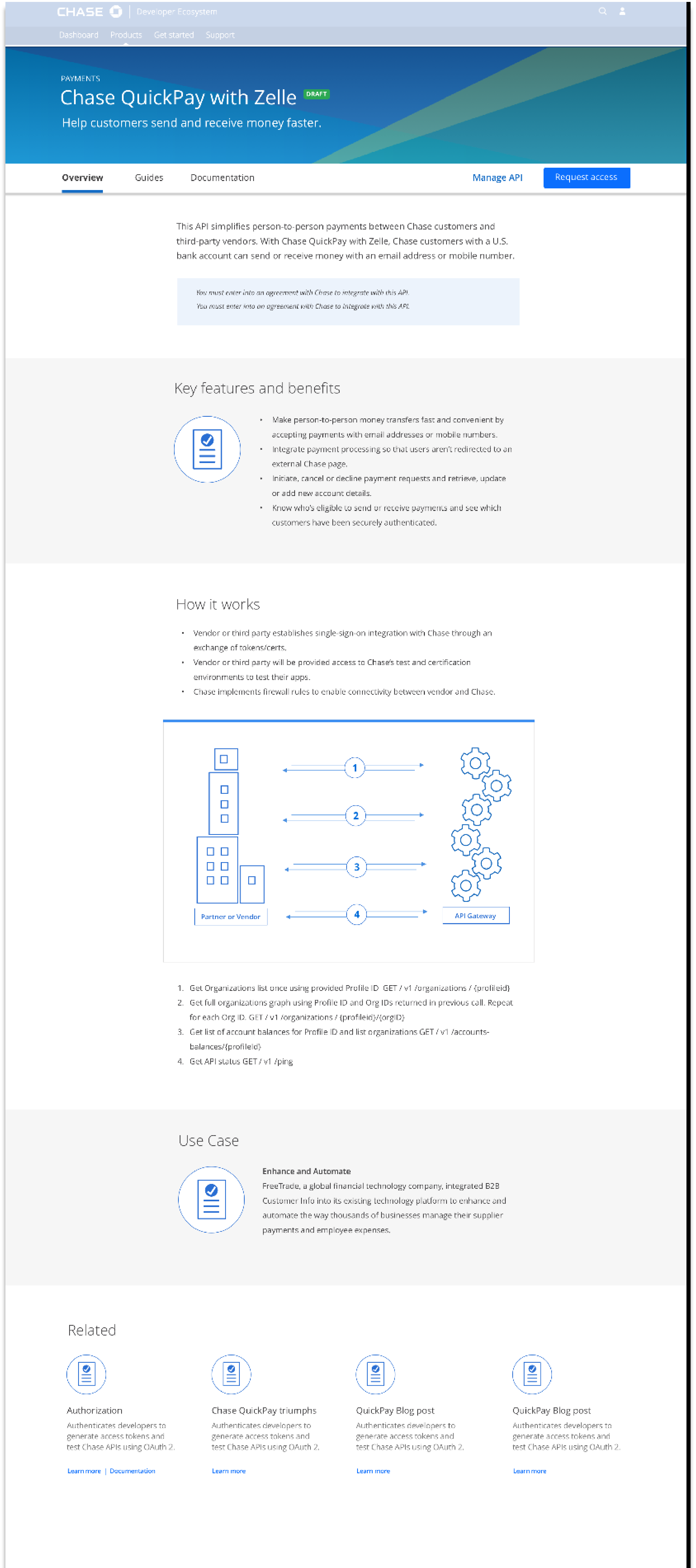
Get keys once entitled

Once developer has been approved as a partner, they can get the keys to call the APIs from the gateway.



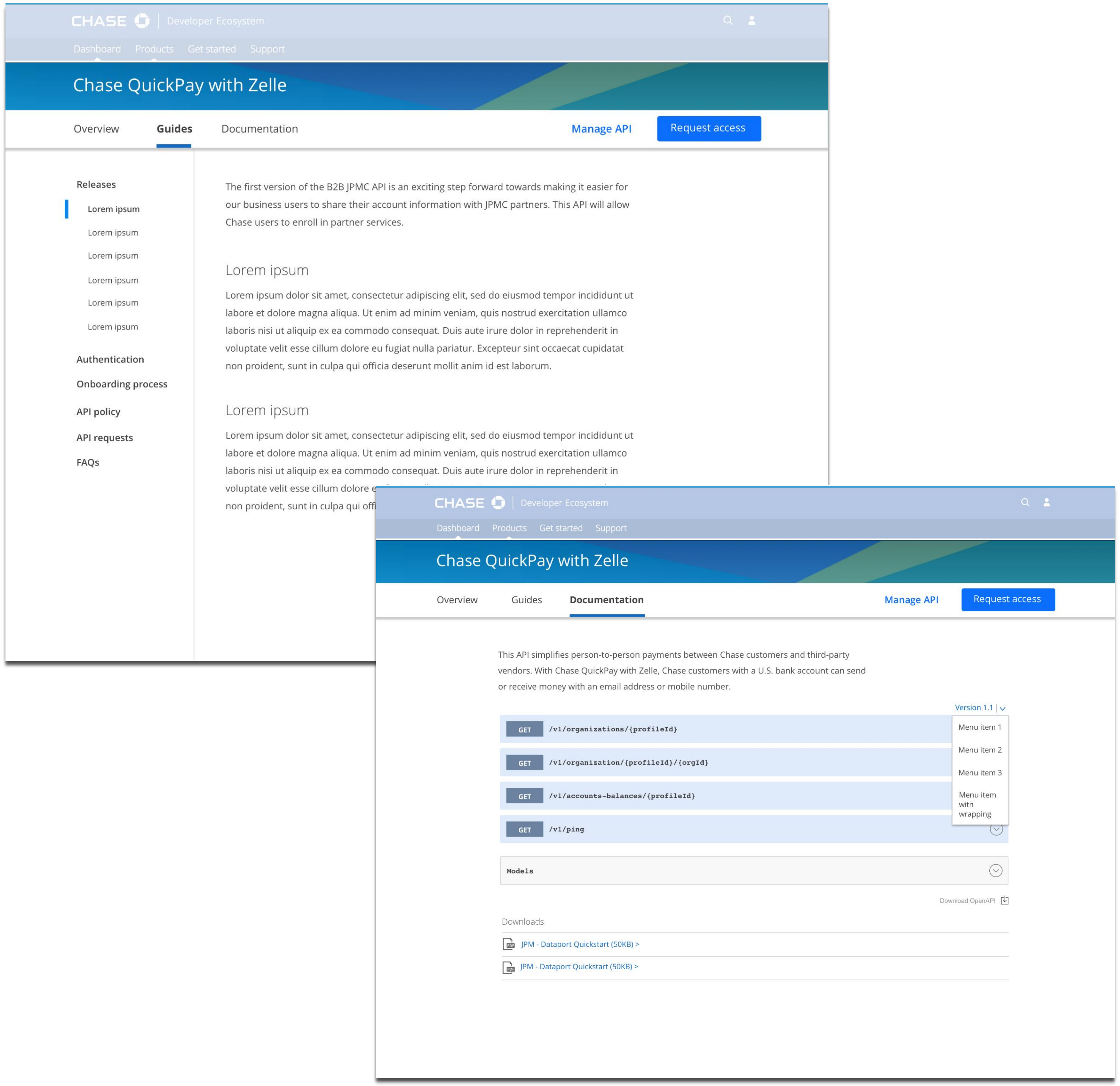
Marketing API Products

Different external partners include Developers, CTOs as decision makers and business owners. They have different needs in documentation. For example, a business owner would appreciate this marketing page to explain capabilities, but the developer would call this fluff.



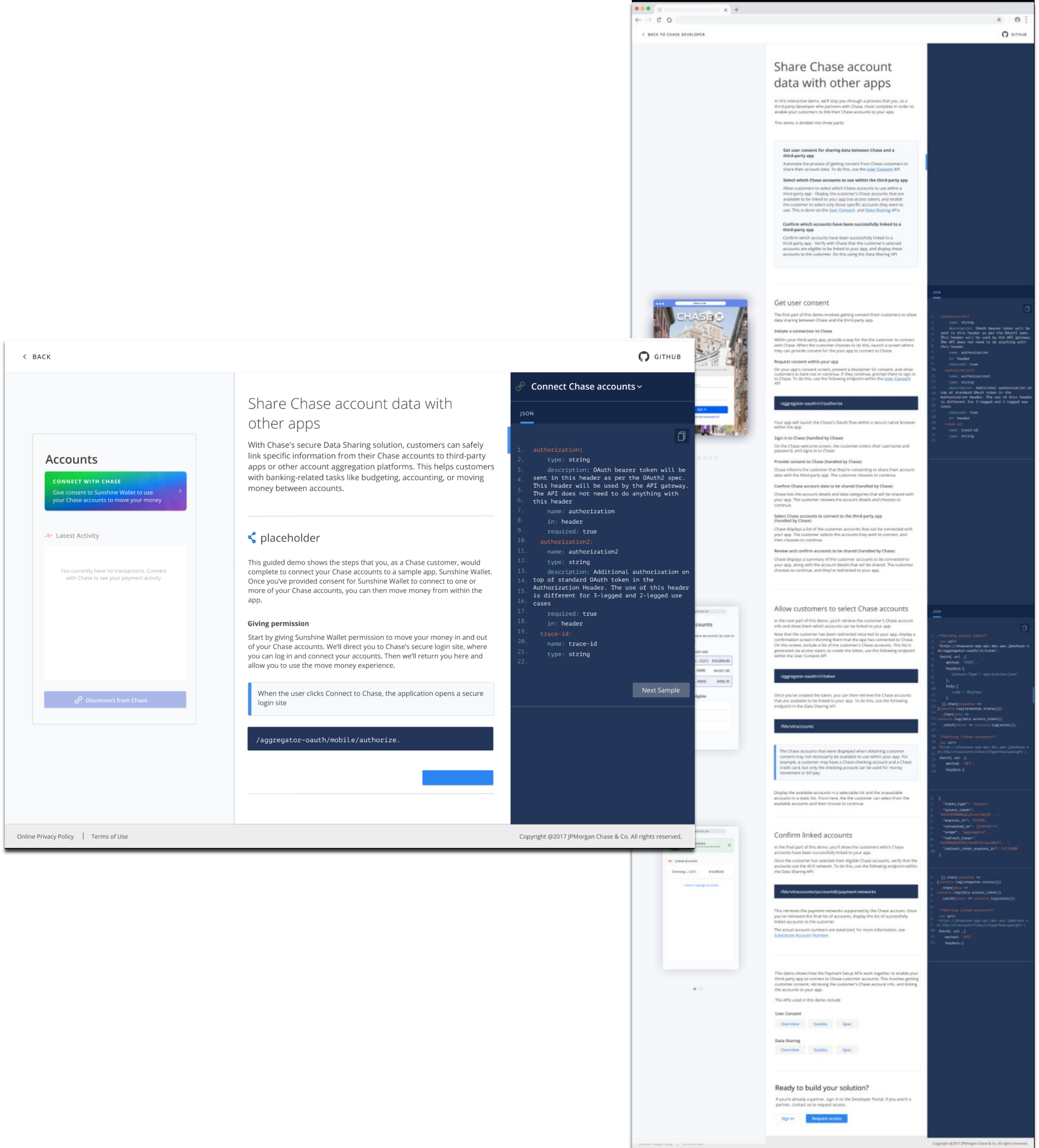
Guides and Swagger

Most developers would say “Just get me to the code”, as bottom-up thinkers, but less seasoned may prefer guides to walk them thru the flows and tutorials.



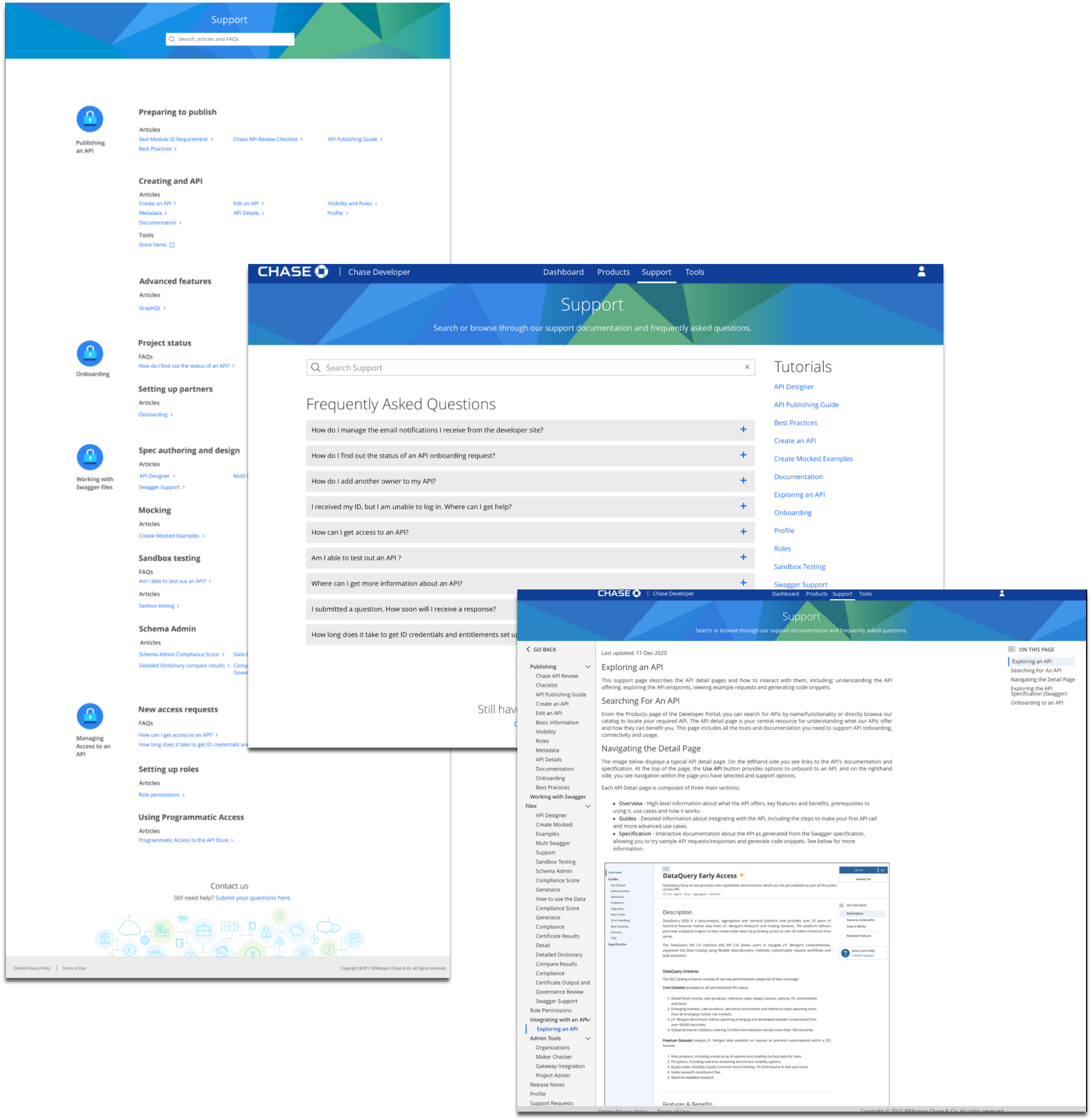
Interactive demos

Adding richer media and code examples for quicker comprehension of what the API does.



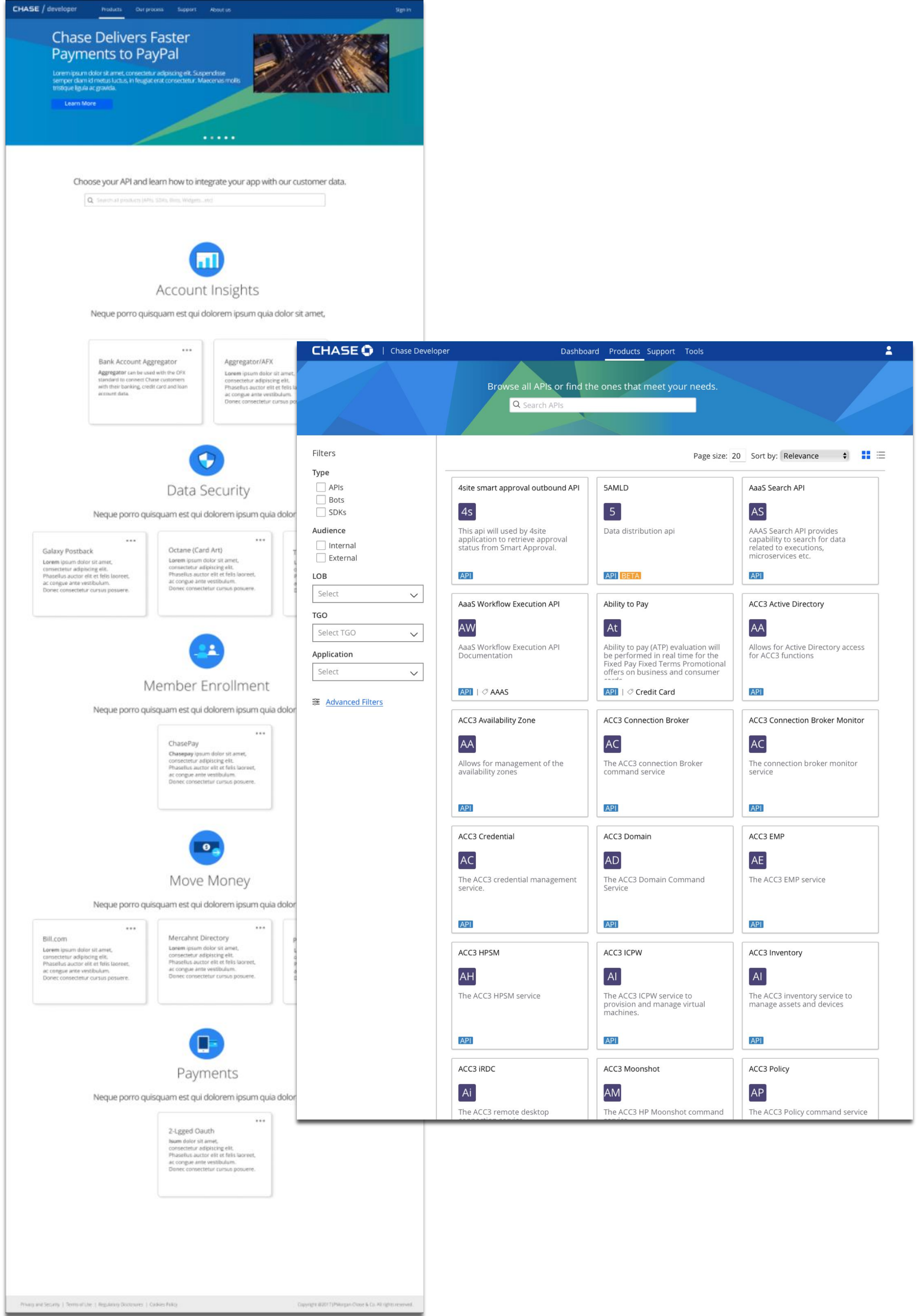
Supporting docs

Orient the user on all the support docs we have available with getting started information.

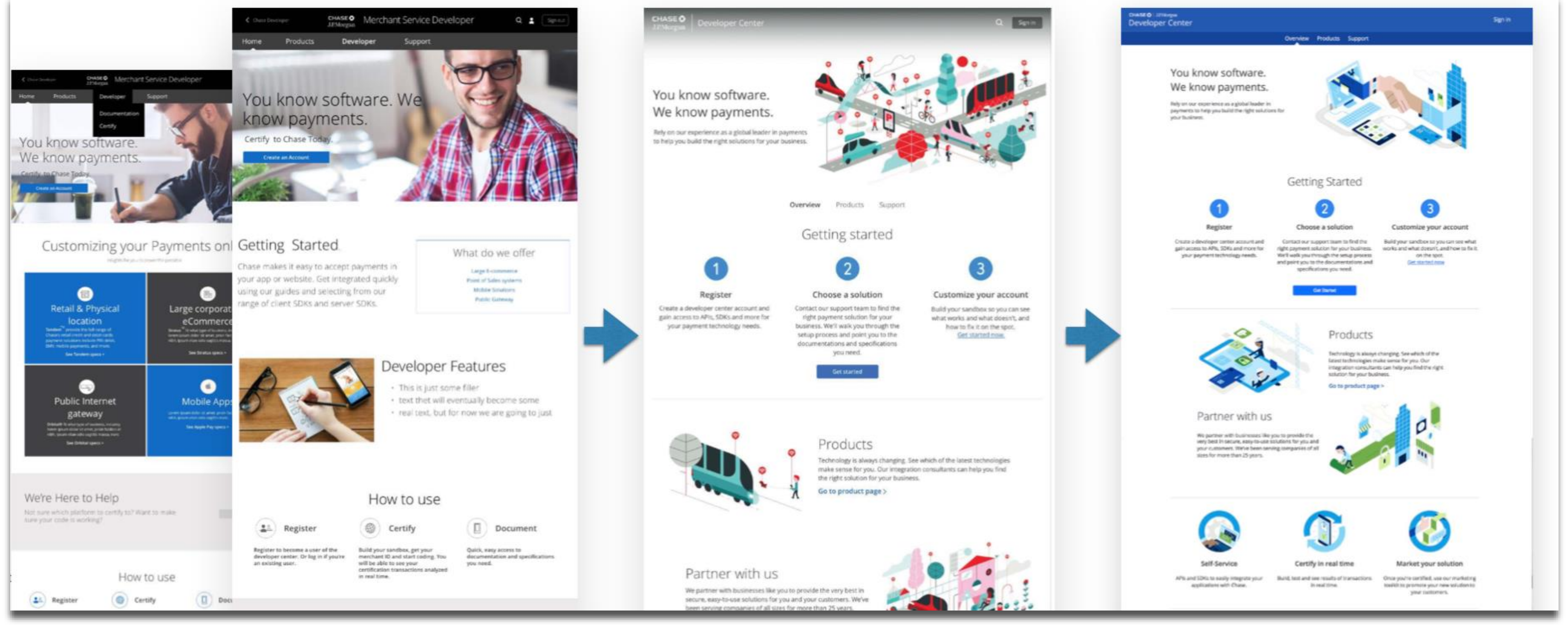


Discover APIs

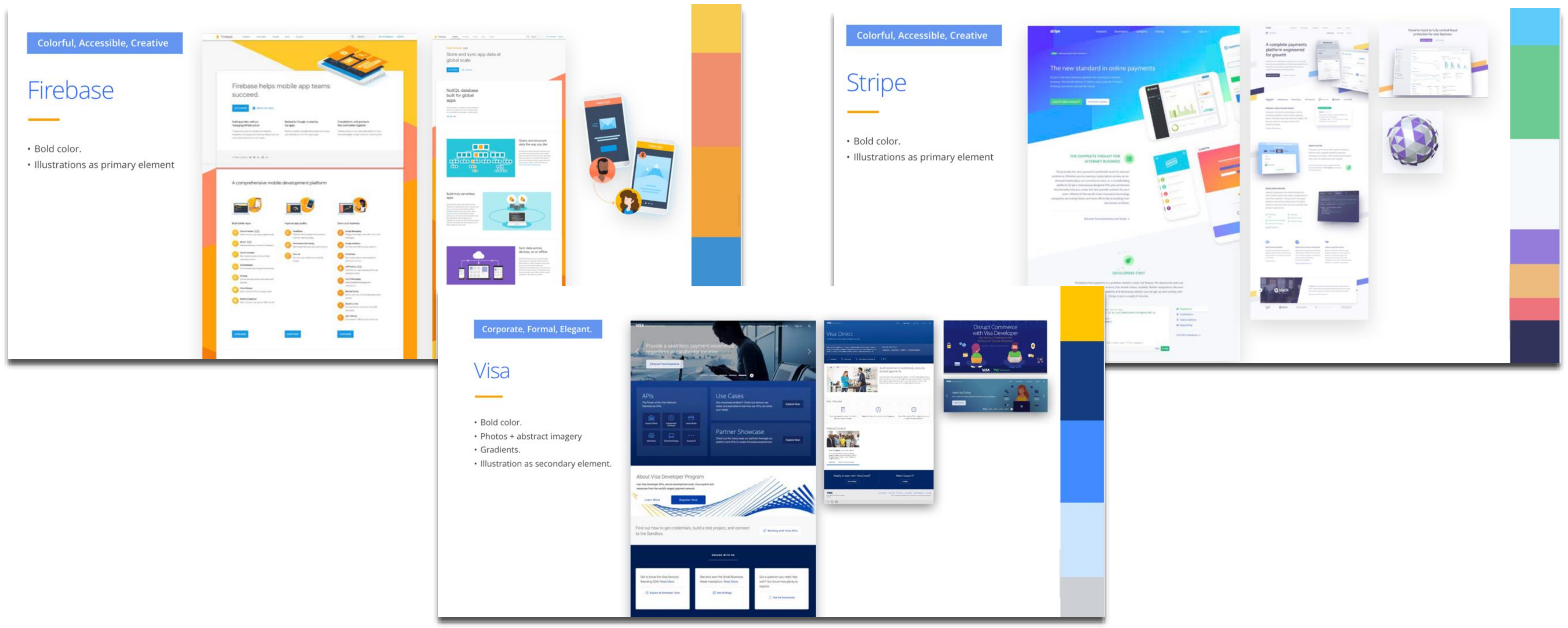
External versus internal API discovery shows the scaling need to add search, filtering capabilities and determining the taxonomy of categorization.



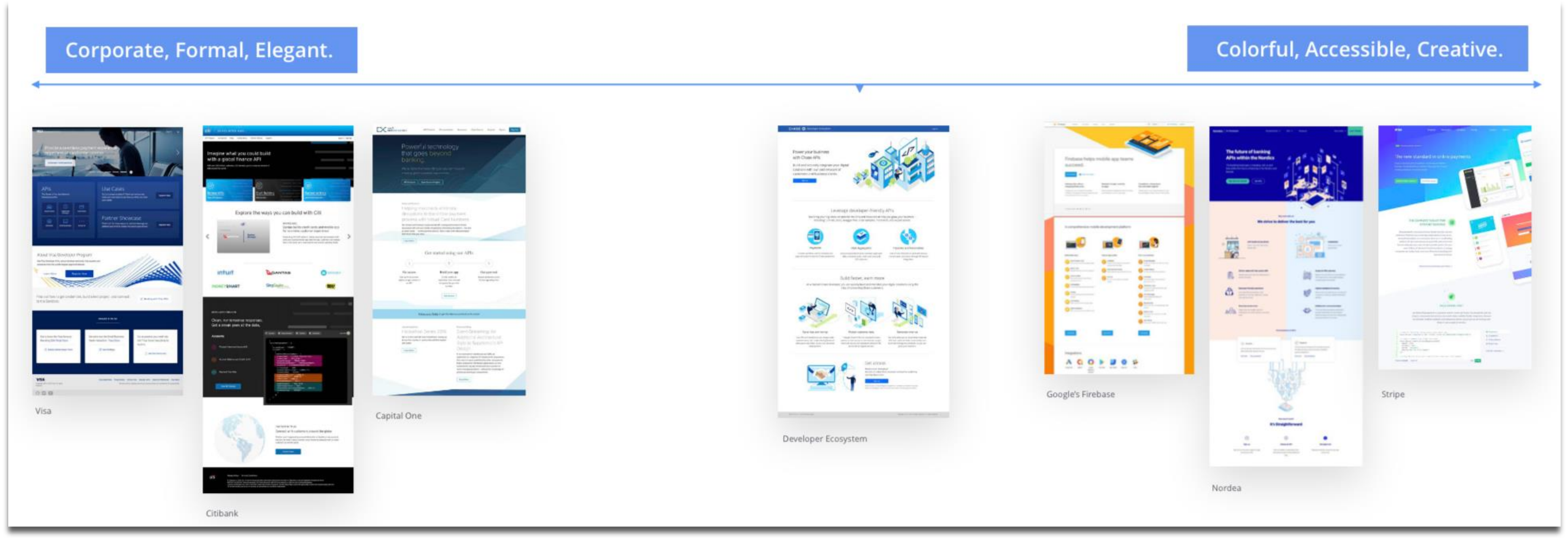
Branding



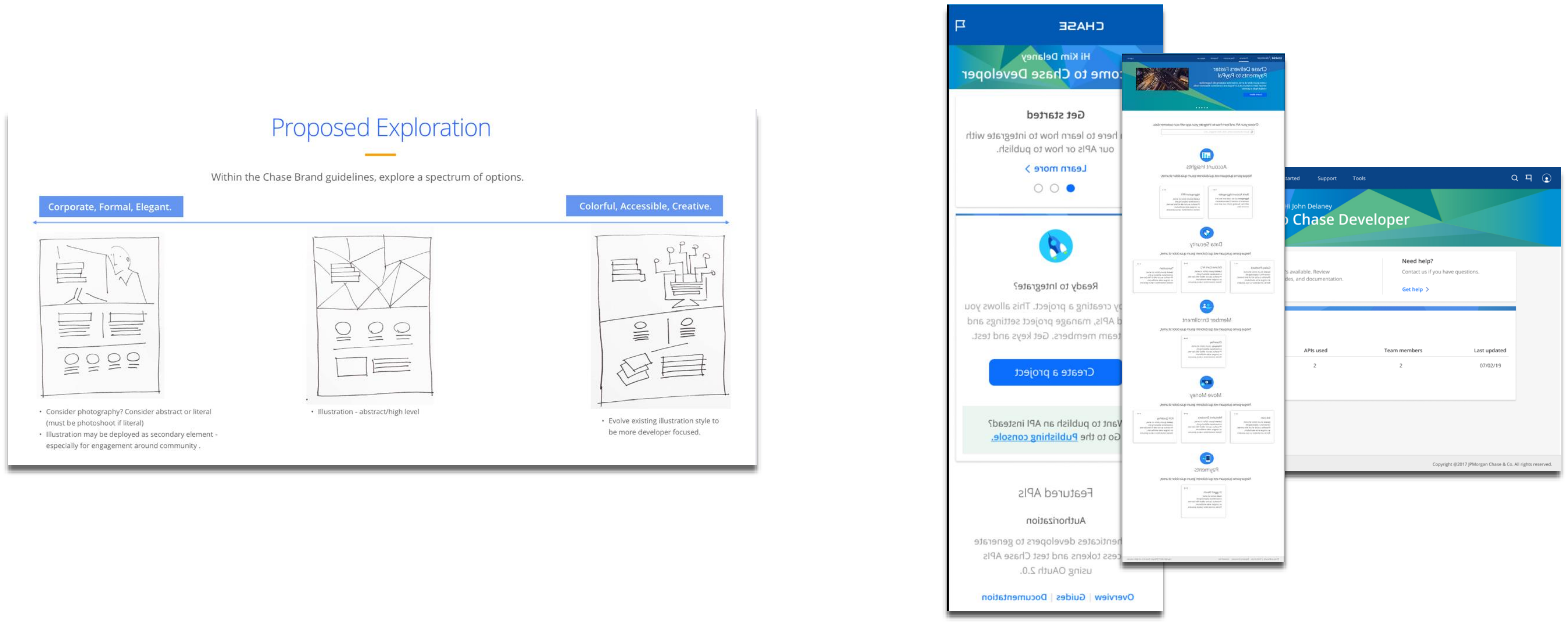
Testing showed us developers liked minimal, colorful, illustrative feel.



We studied our competitors both big tech and banks to determine their mood boards, branding and color schemes.



Our original designs was to integrate several JPMorgan & Chase portals, but with multiple front doors the preference was to go with the strong Chase brand.



For the interim we went with a abstract feel to not be dependent on illustrators, but our goal was to hire an illustrator for that Google-esque feel.

Goldman Sachs
Wealth Management Application

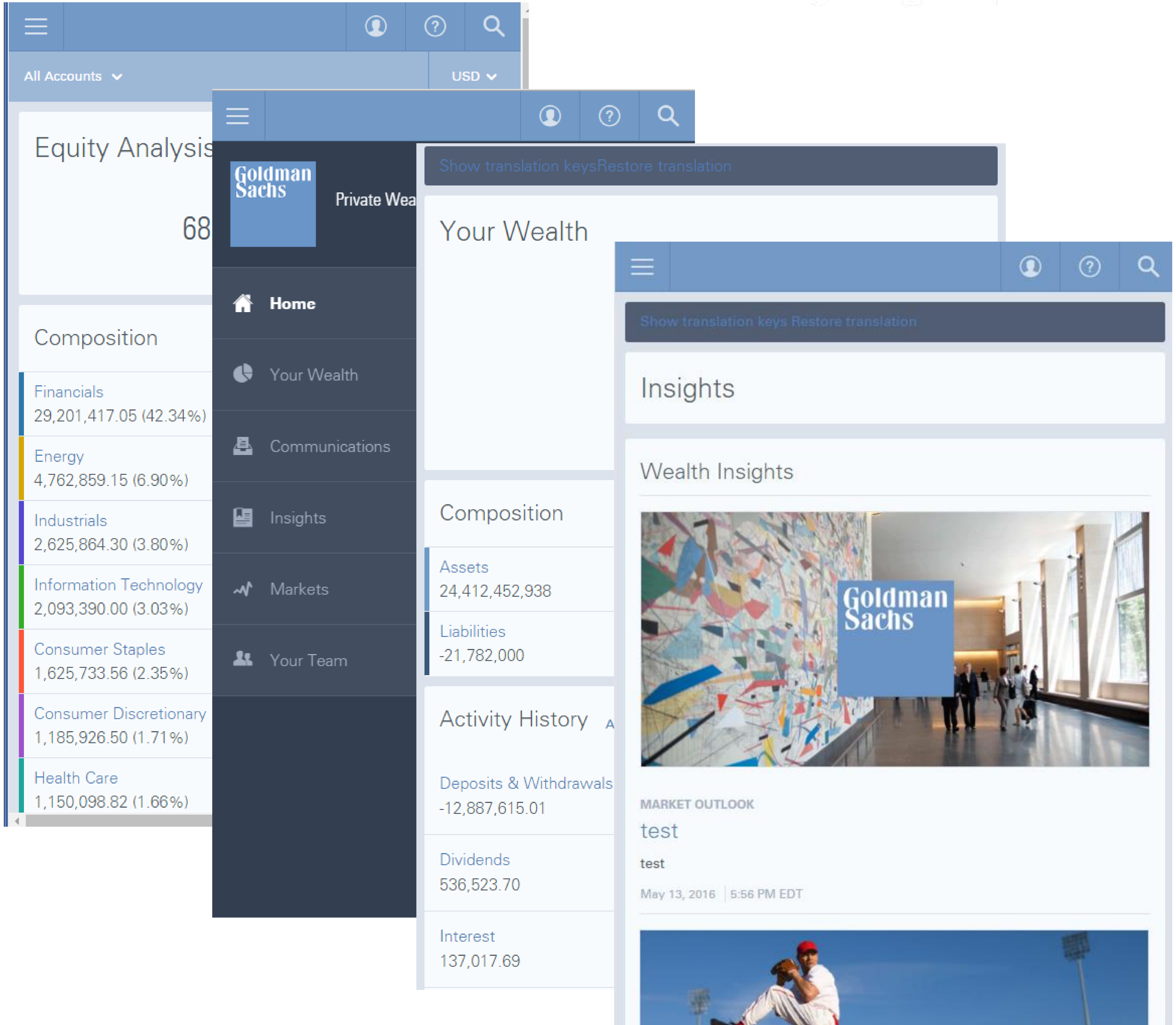
Role: Sapient Design System Lead Consultant, Technology Manager and CSS Expert

Partners: Lead Architect, Product Owner and Application Tech Lead

Teams: Two Design teams both in-house and vendor, 20 front-end developers both in-house and offshore

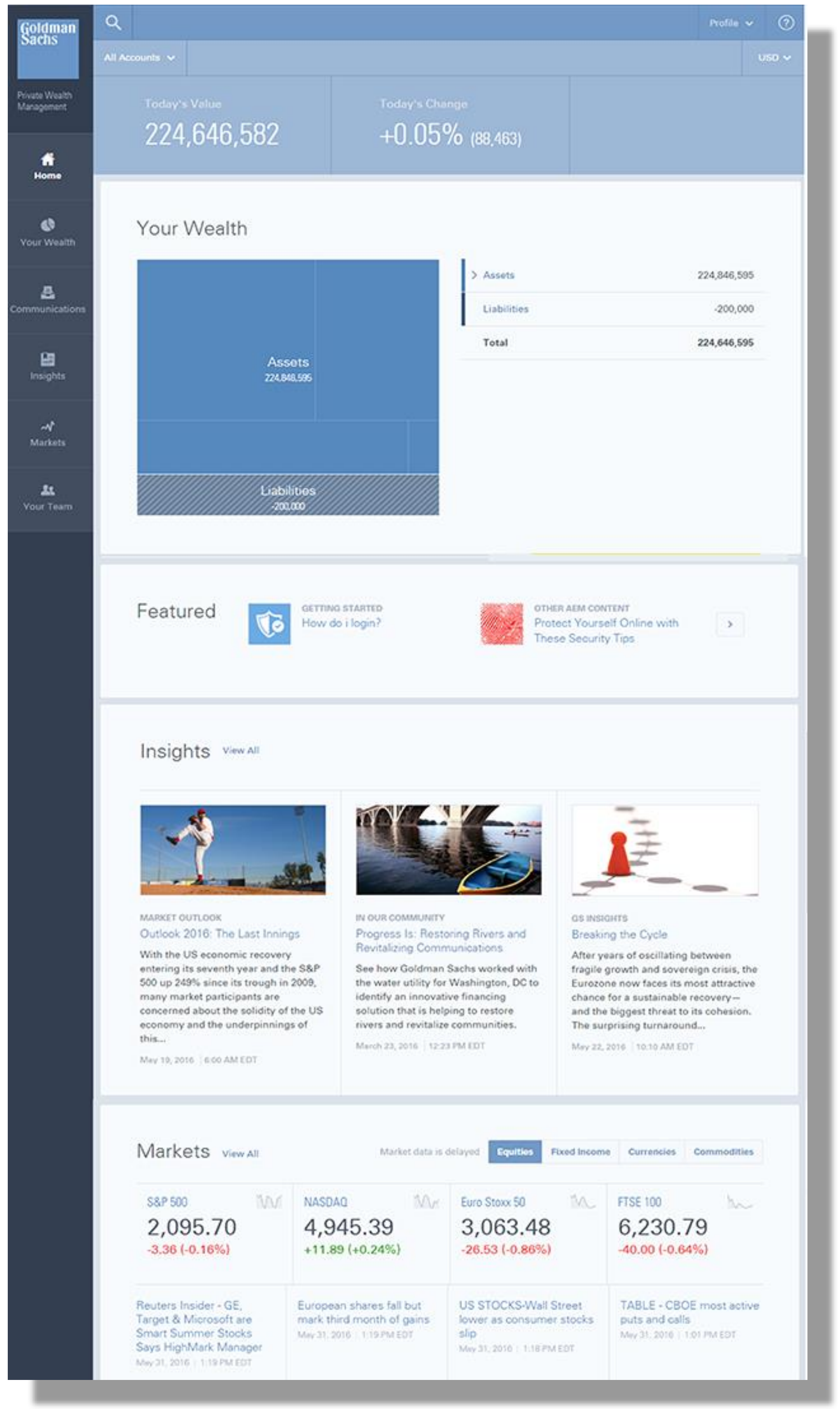
Results

- CSS files reduced by 50%
- UI Bug reporting reduced by 85%
- Load times decreased significantly
- Development velocity improved by 45%
- Design focused more on problem solving and innovation than on design reviews and visual QA
- Component library improved faster on-boarding and training
- Sketch versioning design files improved consistency and quality of design

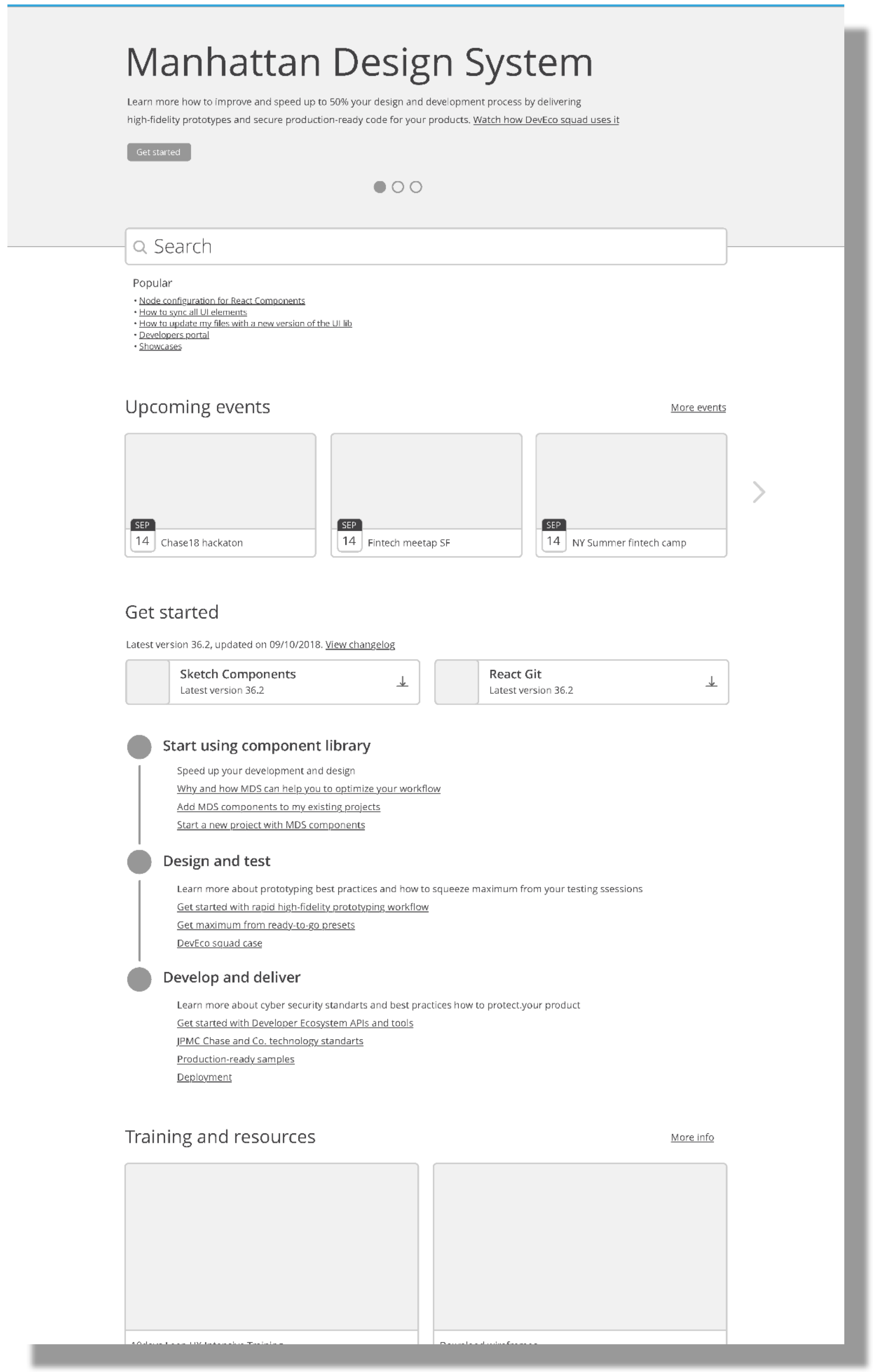


System thinker

I managed building design systems for over 12 years,
both from the technology and design perspective.



Goldman Sachs
Technology Manager, Design System Lead,
CSS Expert

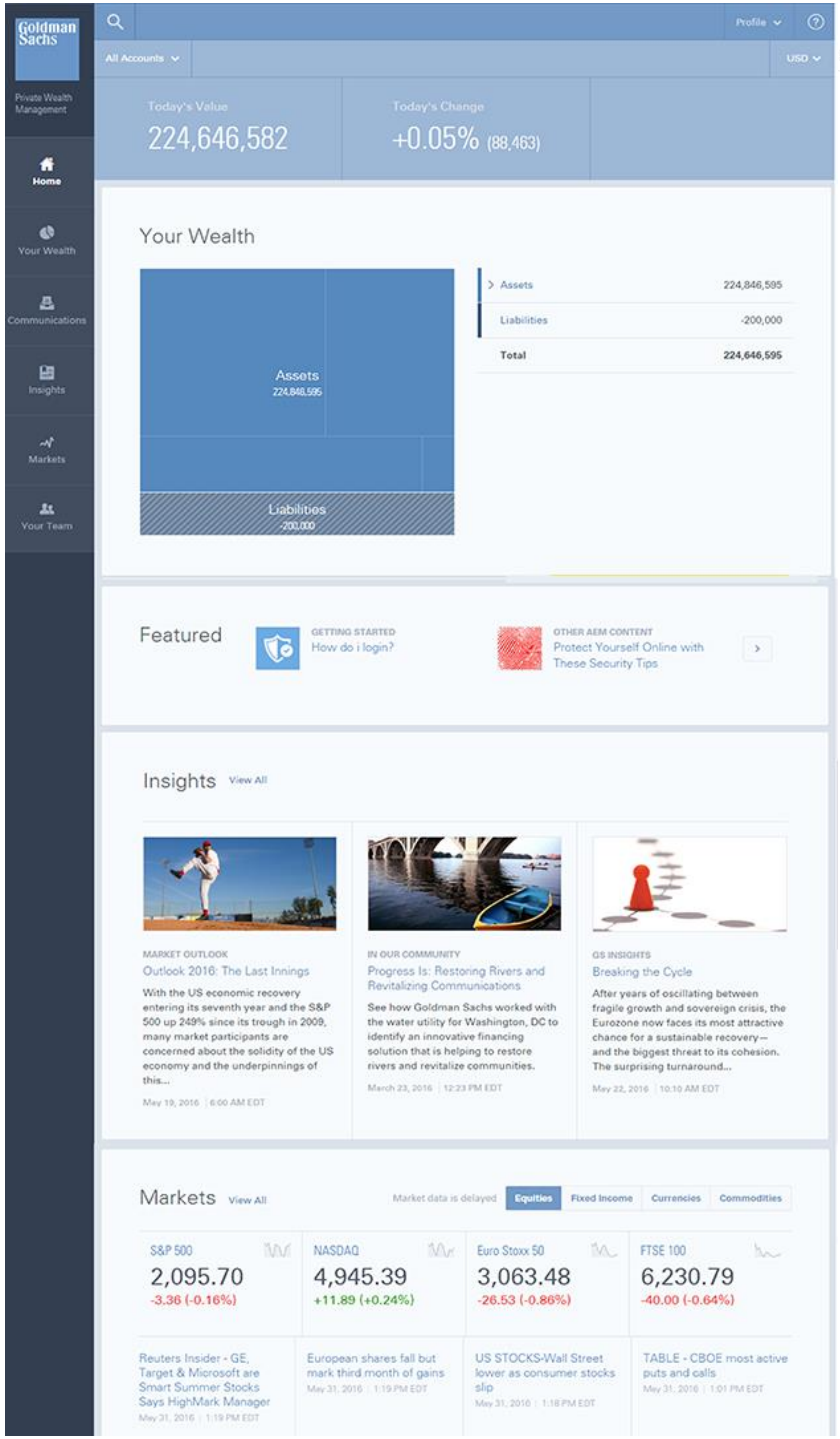


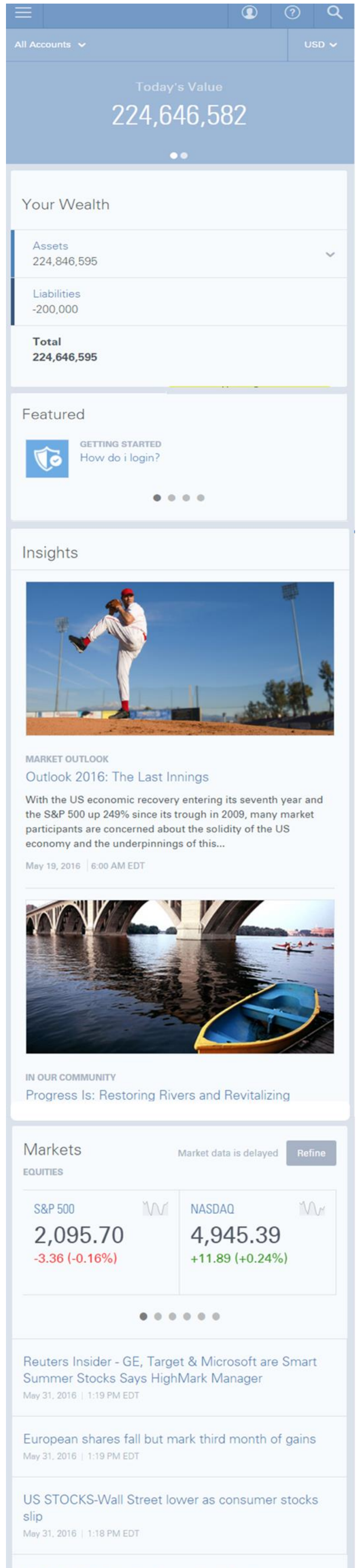
Chase
Cross Channels Design Systems,
VP Design UX Lead

Problem Statement

Goldman Sachs Wealth Management application was two years into production and was having issues with performance, long load times and prone to visual UI bugs.

In addition, as the tech and design teams were growing, they were both contributing to a lot of inconsistencies. Each new design team would design alternative “Improved” component solutions and the different development teams were solutioning these same components but in custom variations, creating all sorts of bloat code.

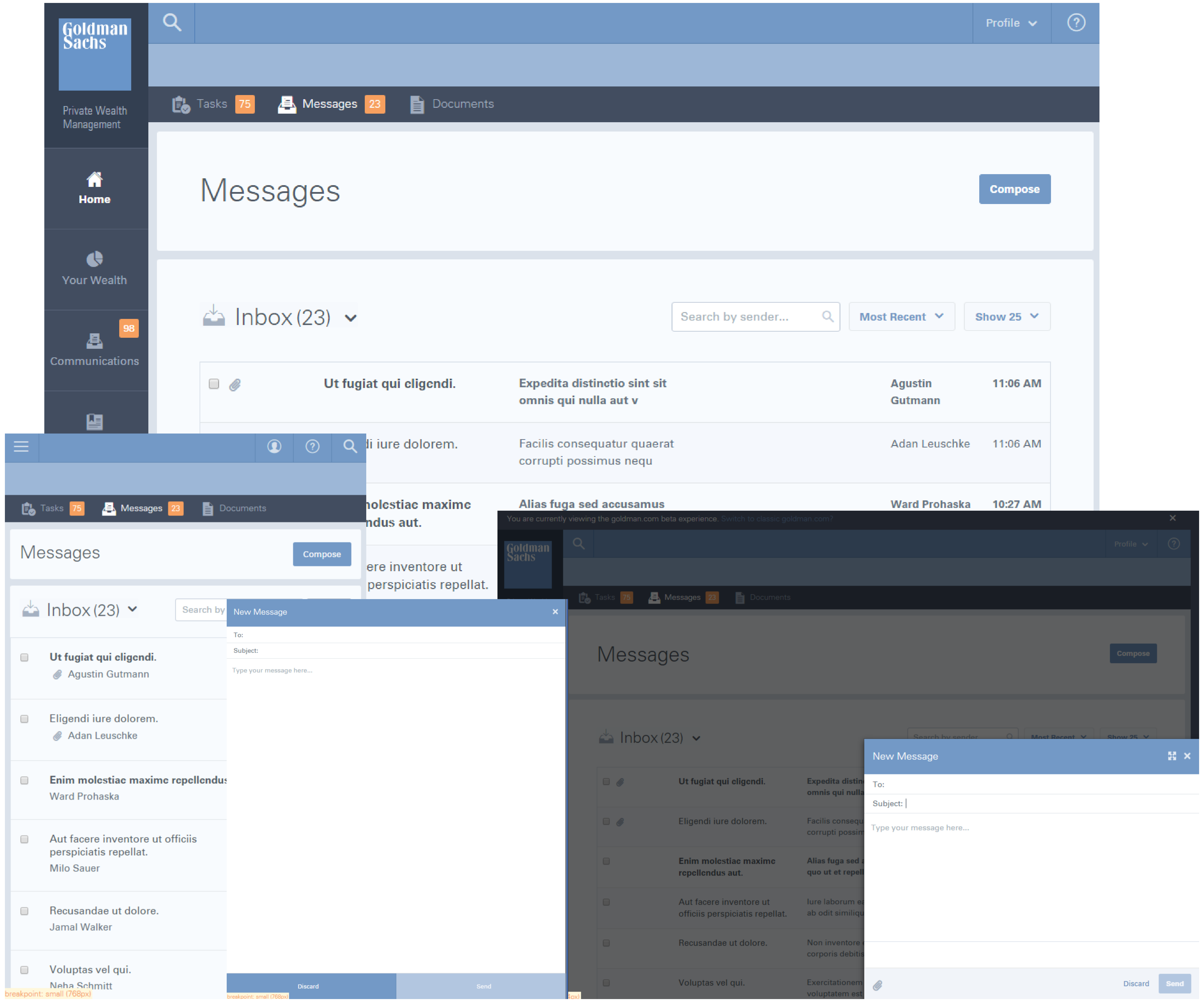




Goal

Build a new design system and component library.

- Re-architect the HTML / CSS
- Refactor old legacy code with the new systems
- Build scalable and readable code, including folder and file structures
- Improve performance and bug reporting.
- I also had to learn about ADA compliance and built that into the systems
- I oversaw all front-end development on building new structure and fixed any cross-browser bugs. It all started and ended with me.



Even Gmail doesn't have a responsive email system.
Kind of proud of this work.

Atomic Design Architecture

Say yes to Sass and defining design tokens, but do not over-engineer the code to make it difficult to read. It needs to be understood 3 years from now by a new team.

Say no to styling generic HTML5. Styling this way causes CSS code bloat, large file sizes, creates higher specificity and processing. Classes, are your best friend and improves reusability.

Atomic Design both folders and file structure

```
-reset
-bootstrap-grid
-fonts
  -google-fonts
  -icon-fonts
-core
  -typography
  -colors
  -tokens
  -utilities
-modules
  - dropdowns
  -tables
-templates
  -nav
  -forms
  -wizards
  -marketing-sections
-pages
  -home
  -insights
  -messages
```

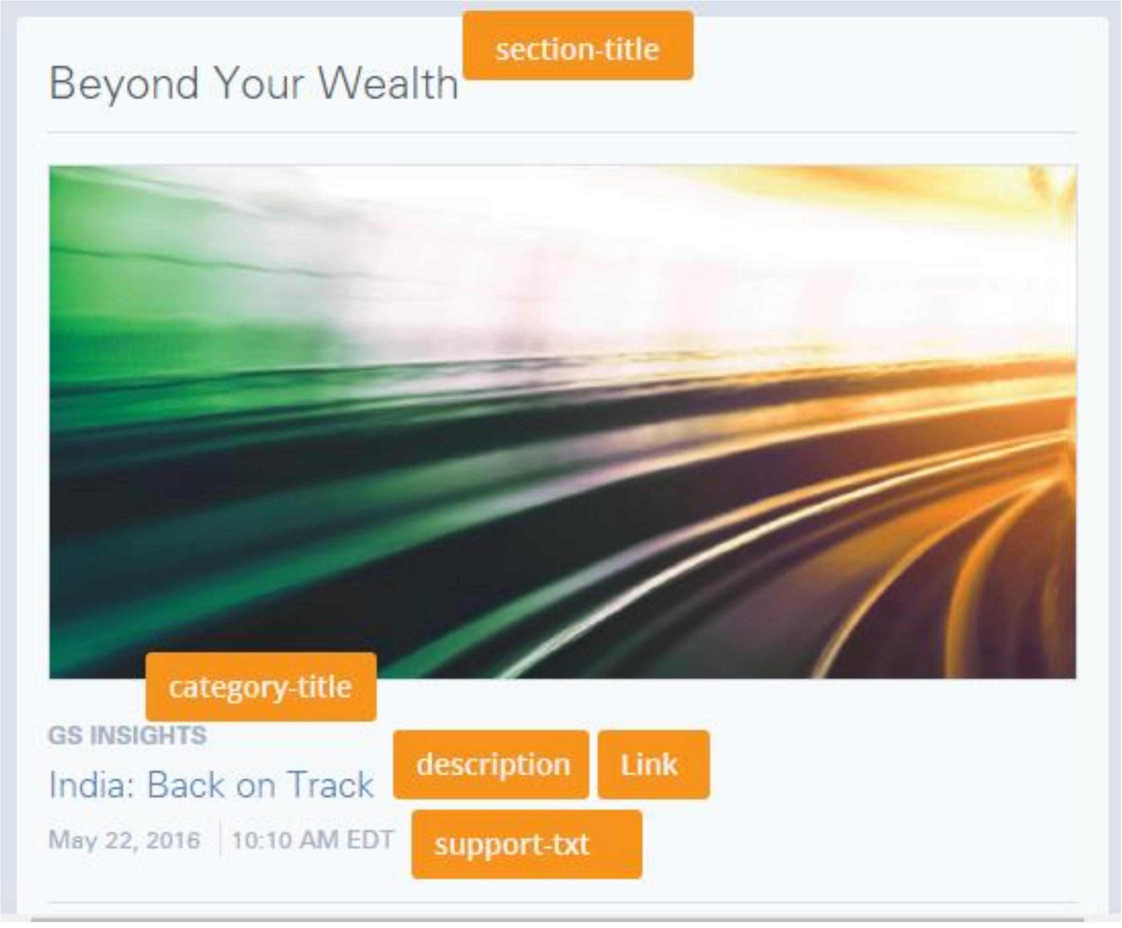
```
H1 {       //LOOKS CLEAN
Font-size:
Font-style:
Font-weight:
Font-color:
Line-height:
margin-bottom:
}

EXAMPLE CODE BLOAT   .chase-brand H1.page-title—inverse !important

Instead define once and one word reuse in the HTML

.page-title {
Font-size:
Font-style:
Font-weight:
Font-color:
Line-height:
}

<h1 class="page-title mb-16"?
```

CSS Proposal – No one size fits all

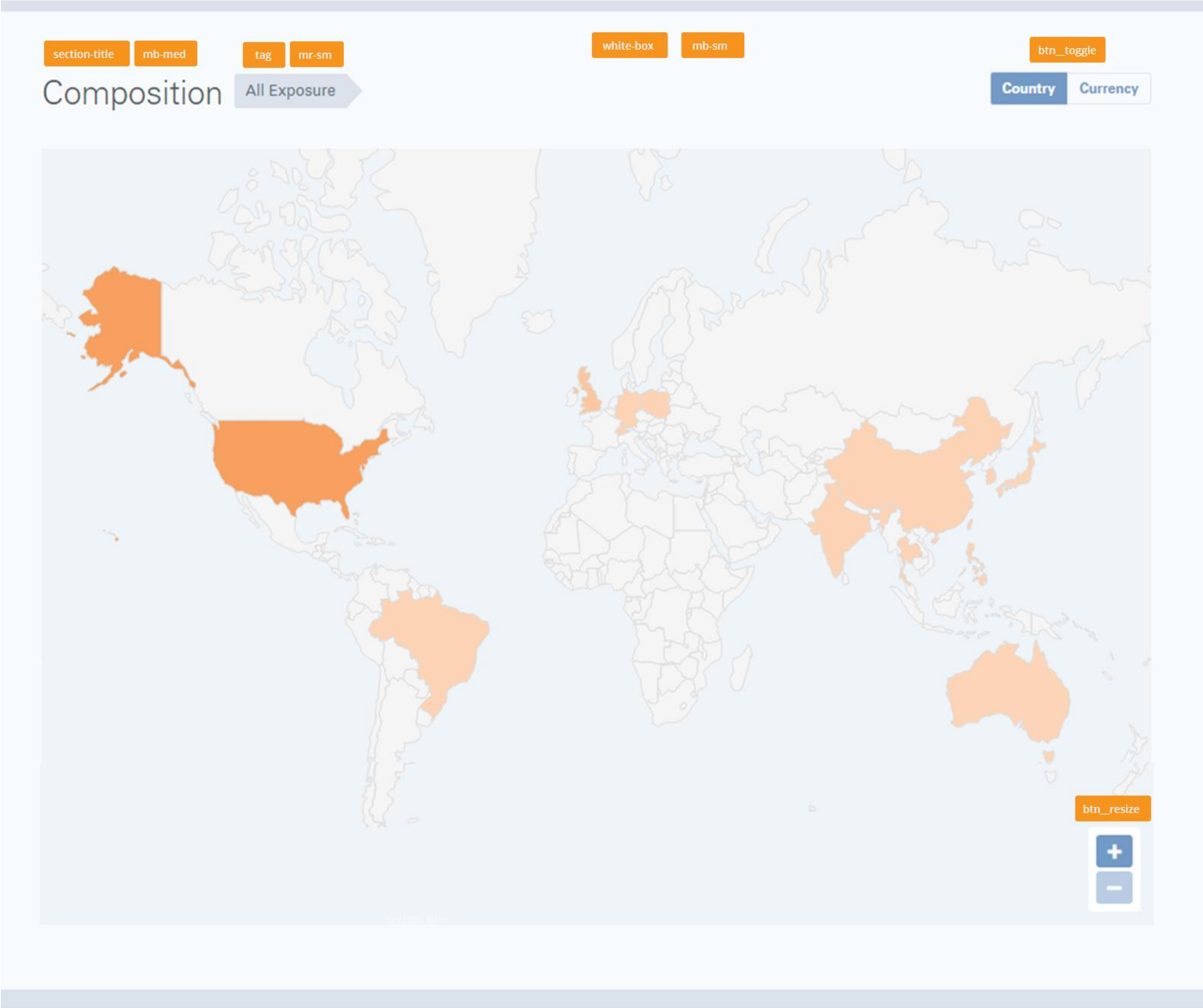
Use Object Oriented CSS and BEM methodology

Use BEM for components
Helps with encapsulation and readability. Less Bugs!

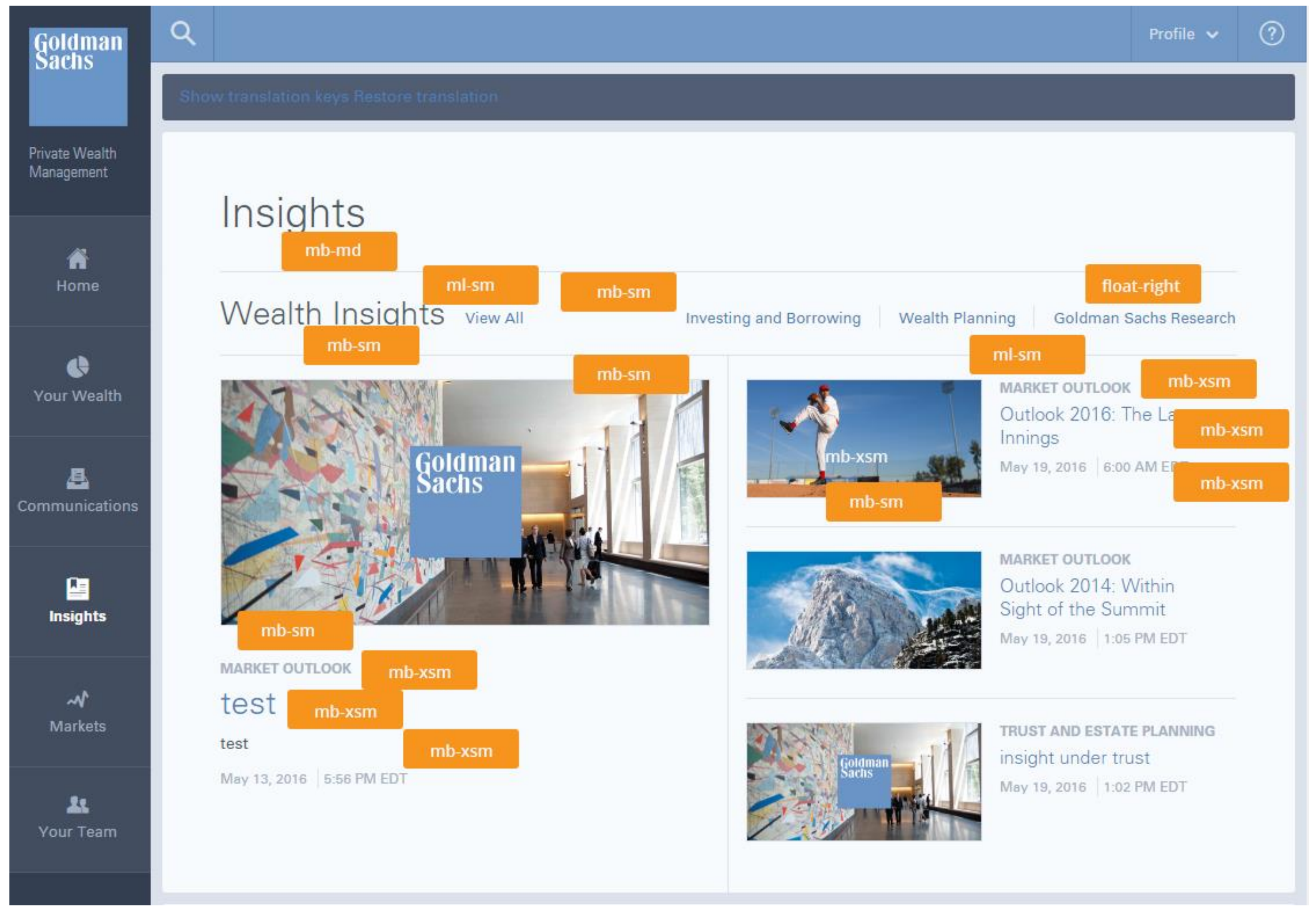
Block__Element--Modifier

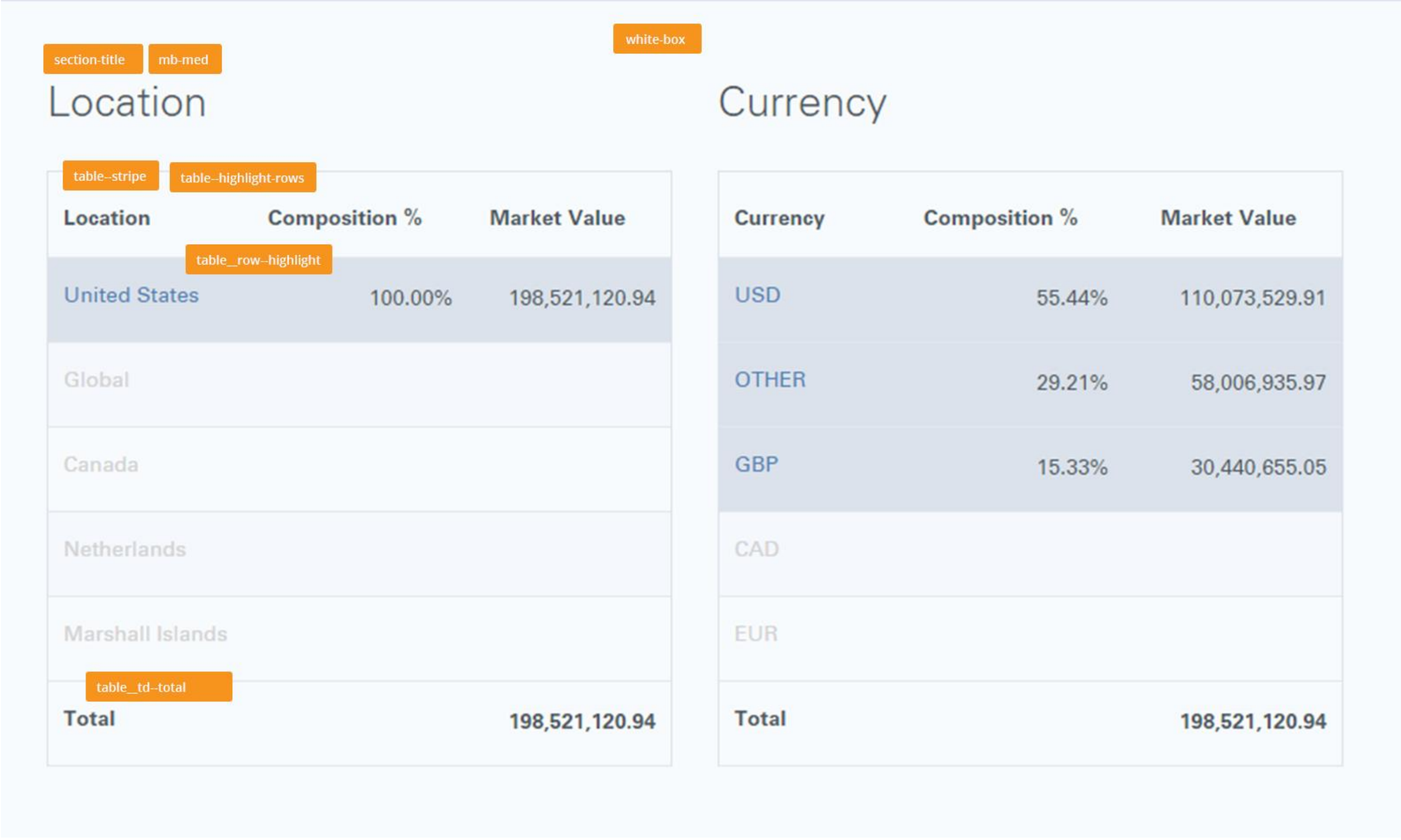


Typography classes
Use Semantic classes for easy understanding



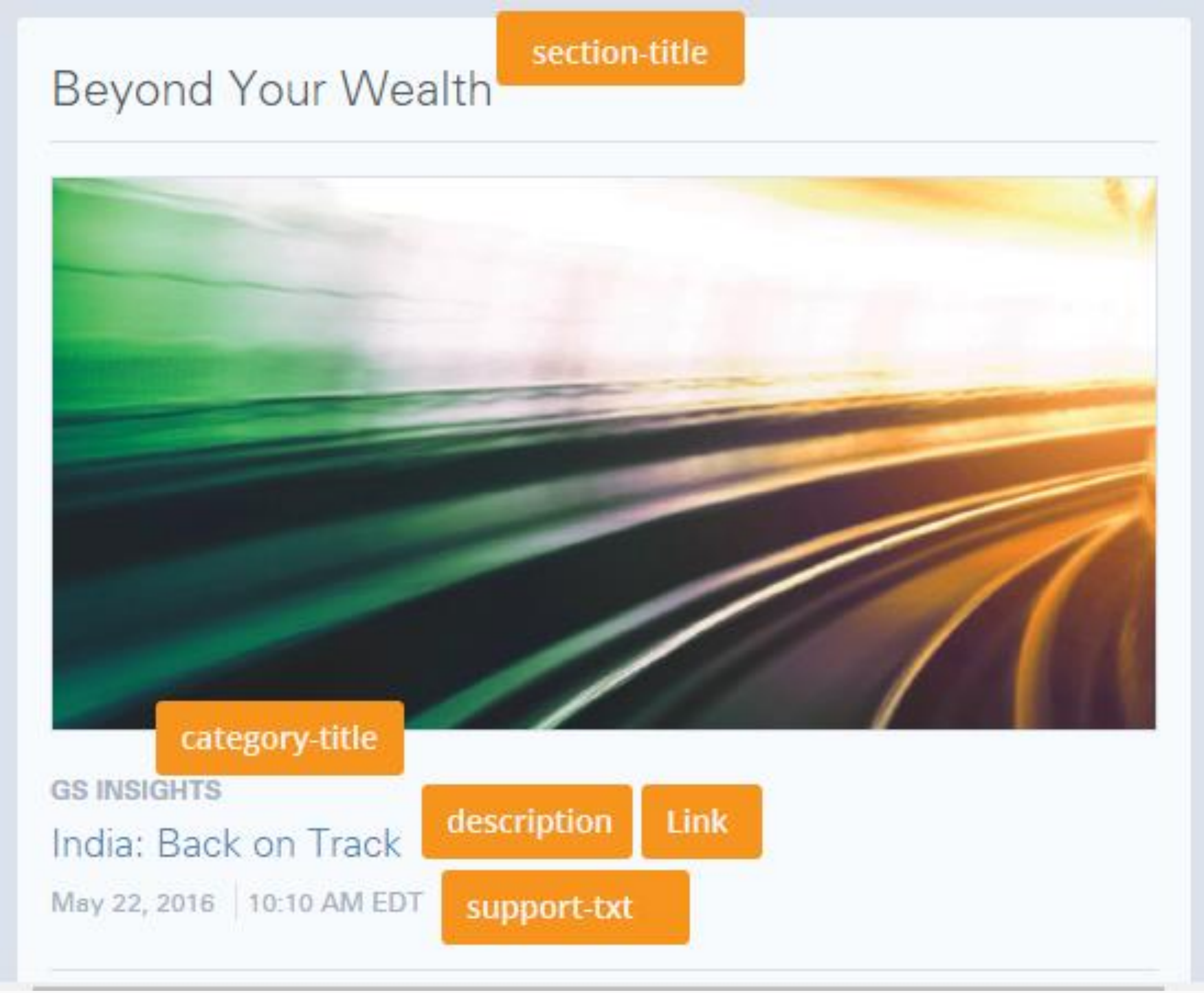
Utility classes
Constraints create consistency, proximity comprehension



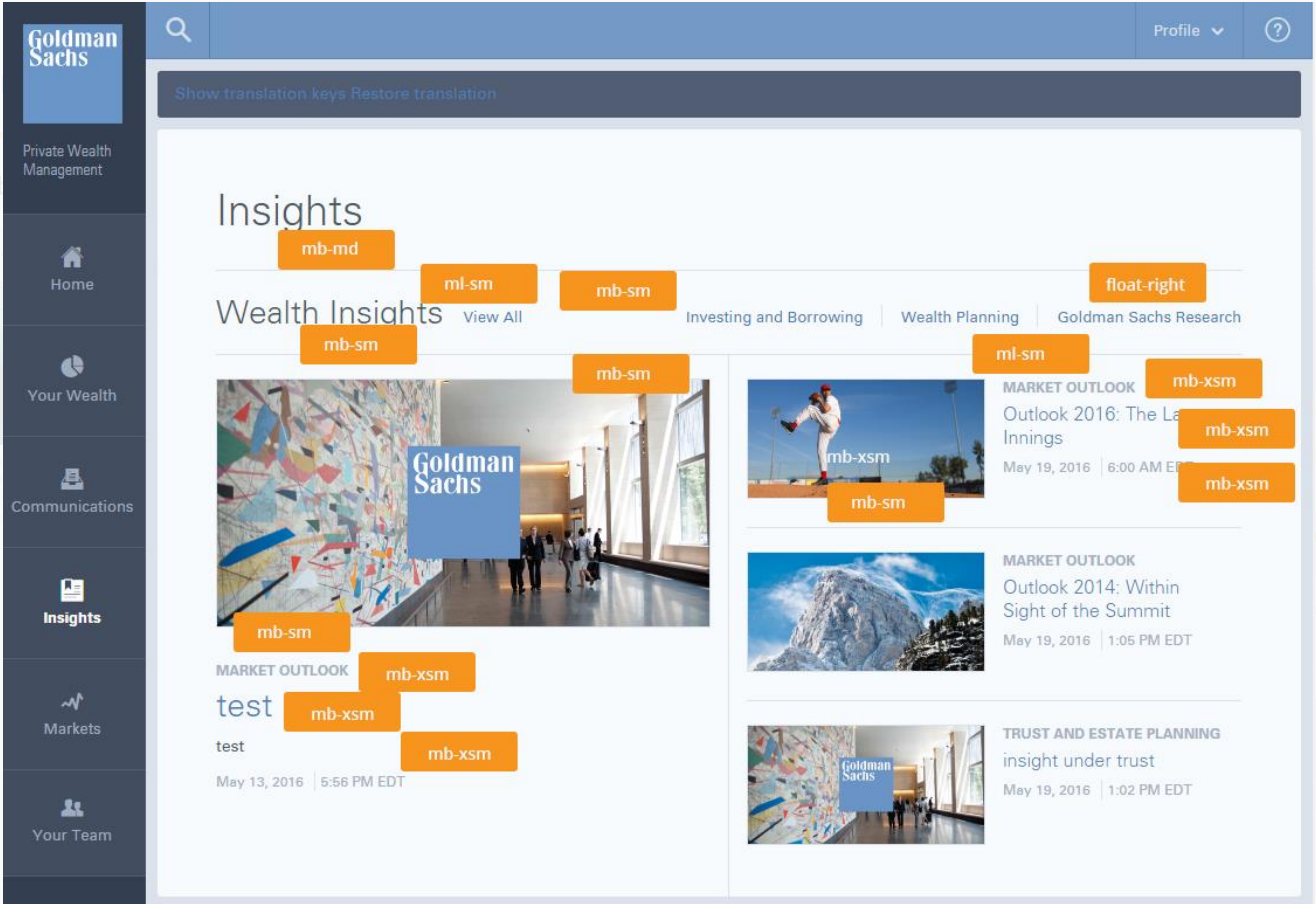


CSS Proposal – I

Use Object Oriented



Utility class
Constraints
consistency
comprehens


Goldman Sachs
Private Wealth Management
Profile
Show translation keys Restore translation
Home
Your Wealth
Communications
Insights
Markets
Your Team
Insights
mb-md
Wealth Insights
ml-sm
View All
mb-sm
Investing and Borrowing
Wealth Planning
Goldman Sachs Research
float-right
mb-sm
ml-sm
mb-sm
mb-xsm
MARKET OUTLOOK
Outlook 2016: The La
Innings
mb-xsm
mb-xsm
May 19, 2016
6:00 AM ED
mb-xsm
mb-sm
Goldman Sachs
MARKET OUTLOOK
Outlook 2014: Within Sight of the Summit
May 19, 2016
1:05 PM EDT
mb-sm
MARKET OUTLOOK
mb-xsm
test
mb-xsm
test
mb-xsm
May 13, 2016
5:56 PM EDT
TRUST AND ESTATE PLANNING
insight under trust
May 19, 2016
1:02 PM EDT

CSS Proposal – No one size

Use Object Oriented CSS and BE

BEM for components

s with encapsulation and ability. Less Bugs!

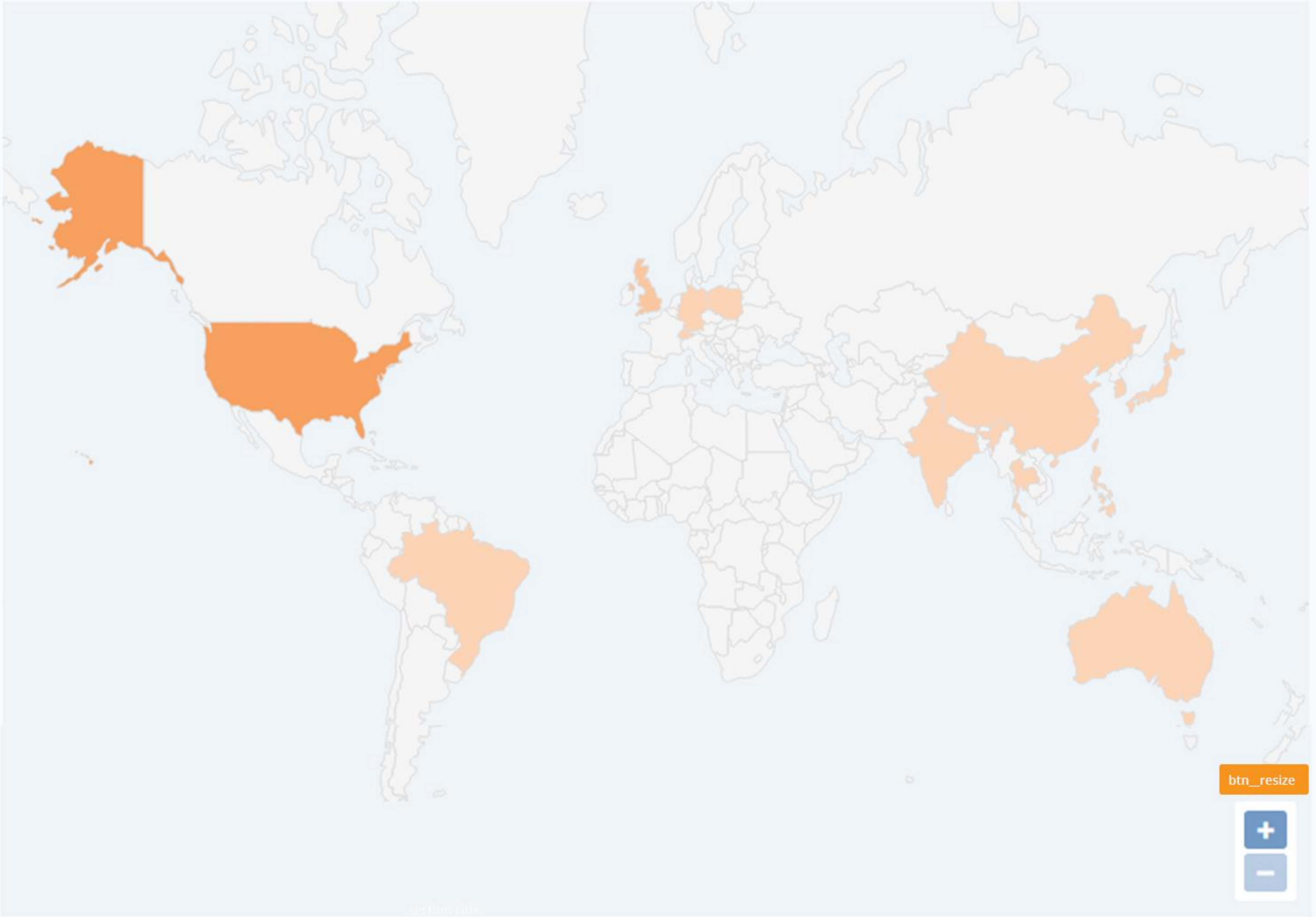
k__Element--Modifier

section-title mb-med tag mr-sm white-box mb-sm btn__toggle

Composition

All Exposure

Country | Currency



section-title mb-med white-box

Location

table--stripe table--highlight-rows table__row--highlight table__td--total

Location	Composition %	Market Value
United States	100.00%	198,521,120.94
Global		
Canada		
Netherlands		
Marshall Islands		
Total		**198,521,120.94**

Currency

Currency	Composition %	Market Value
USD	55.44%	110,073,529.91
OTHER	29.21%	58,006,935.97
GBP	15.33%	30,440,655.05
CAD		
EUR		
Total		**198,521,120.94**

Utility classes

Constraints create consistency, proximity comprehension white-box

section-title mb-med

Location

table--stripe table--highlight-rows

Location	Composition %	Market Value
United States	100.00%	198,521,120.94
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Canada		
Netherlands		
Marshall Islands		
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table__row--highlight

table__td--total

Currency

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GBP	15.33%	30,440,655.05
CAD		
EUR		
Total		**198,521,120.94**

CSS Propos

Use Object O

Utility

Const

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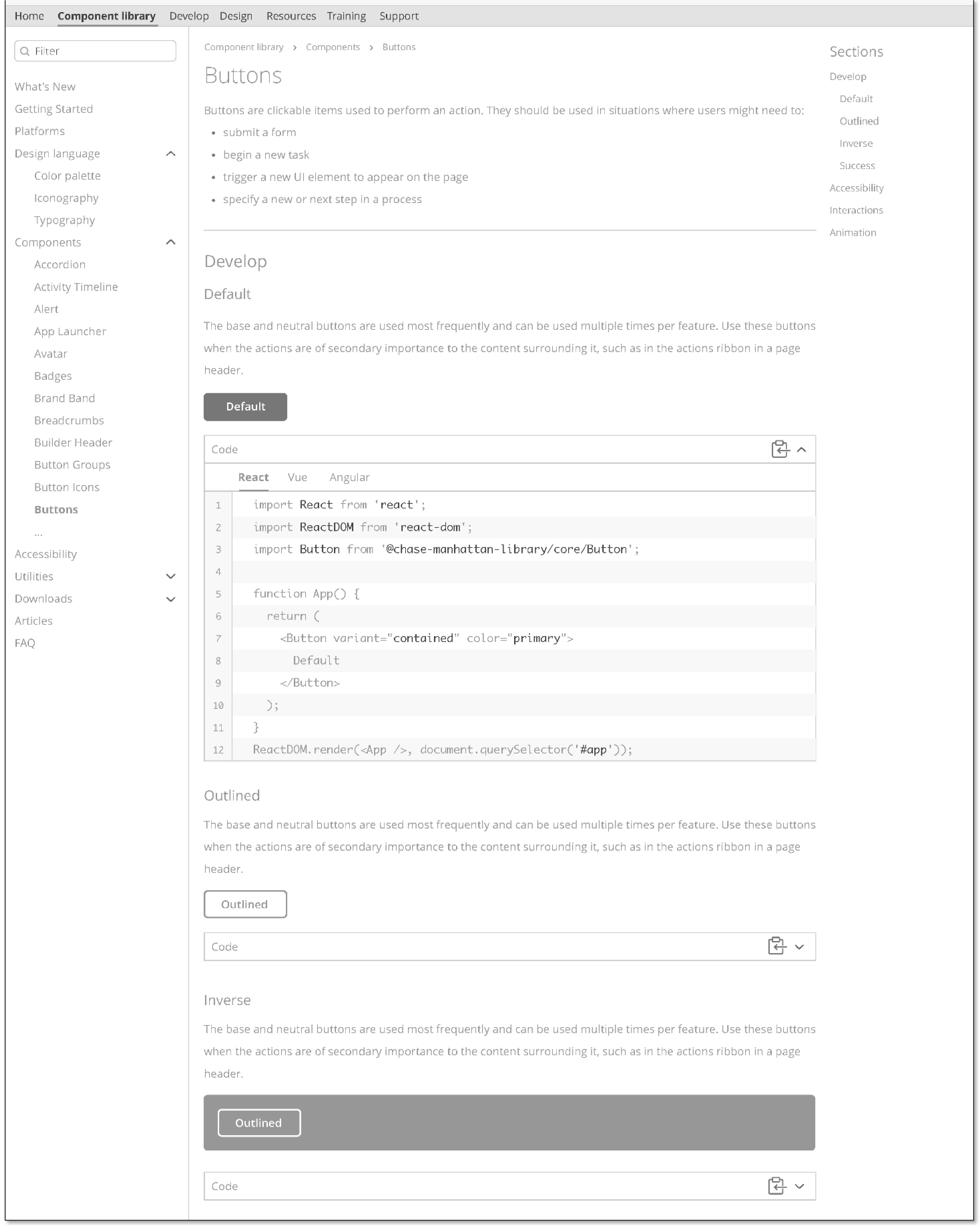
compr

Training designers and developers

- Designed and built a component library website
- Sent out weekly new component release communication.
- Created trainings and workshops to help the developers learn to consume and extend the library.
- Set up weekly sessions with the designers to discuss new component rationale, inconsistencies, alternative responsive designs.



Wireframe of proposed Component Library website

Scaling design systems

Role: Product Design Manager for Cross Channels

Partners: Head of DCE, and Tech lead of Design Systems

Teams: 1 system designer, 2, UX designers, 1 illustrator, 1 motion designer, 1 Content strategist and 1 developer

Problem Statement

3 typical models of scaling design systems when growing large organizations and I have been involved with all three approaches.

Design system team leads for each team To meet in a forum

Good for only a handful of teams. The leads keep an eye on their team's designs and brings new components to the forum for discussions.

Challenges happen when too many teams add too many cooks. Sessions can become brutal with making decisions and delivering on time.

Centralized Center of Excellence dedicated team

Good for auditing and getting started when having a team dedicated to building, governing and recommending new component needs.

Challenges happen when the team becomes a bottle-neck in making decisions. It also prevents innovation with only a small team making decisions.

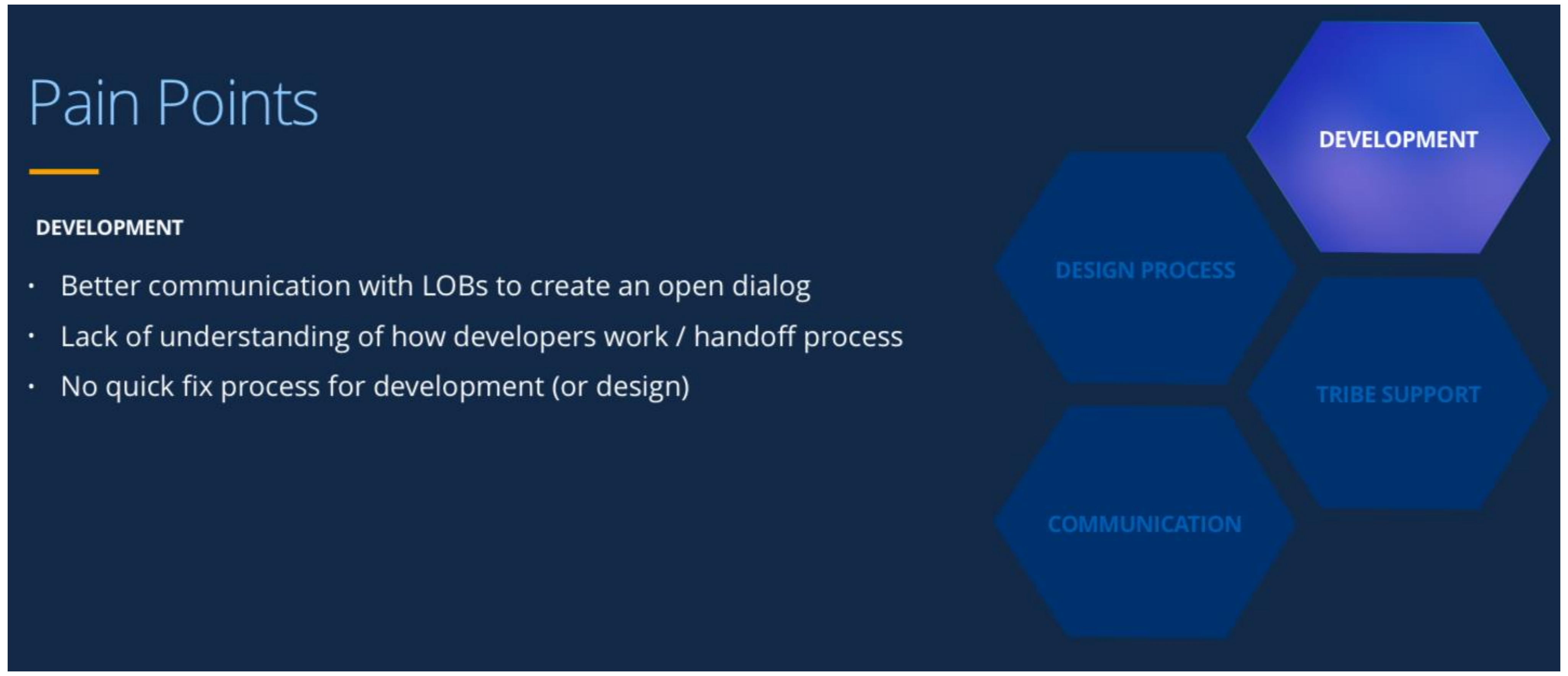
Design system consultants where everyone contributes

Good for many teams. Team only consults, offers support and office hours and updates the versioning systems and documents.

Challenges are keeping the team motivated. Need strong system tinkers and skills with diplomacy and good communication to keep this system healthy.

Pain points

Foundation team used generative testing to speak to all the products teams, both designers and developers to understand what was working and not with our design system processes.



Opportunity

Developed agile sprints, offered office hours, help desk support, and built a new team to document and communicate out the new releases.

What we heard

SOLUTIONS

- Having a stronger center for design excellence, liaise with Foundations to Tribes
- Better preparation and communication within tribes and development teams
- Clear understanding around approvals
- Concise documentation for hybrid, process, pattern and component usage
- Too many design inconsistencies; need a central location for all design screens
- Need more guidance around patterns and principles; Support from the pattern initiative across products
- More capability for collaboration

What we learned

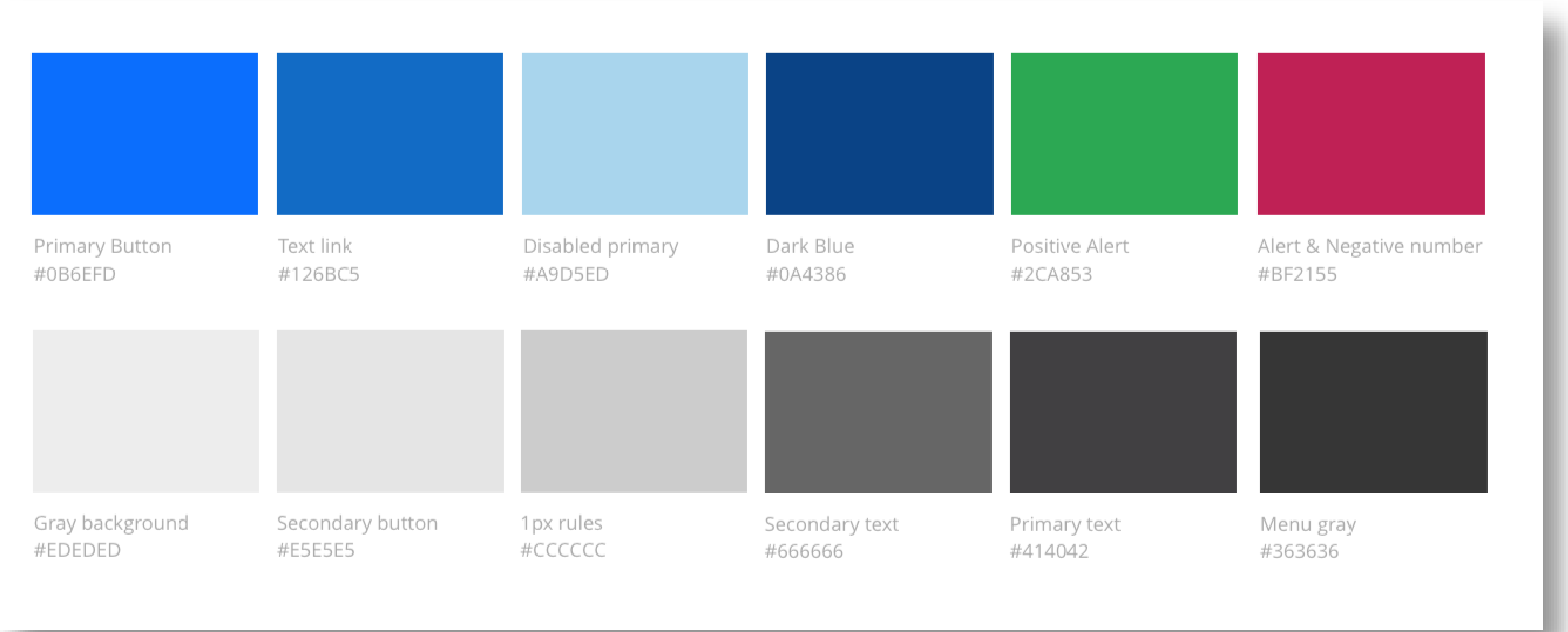
There's no "one size fits all."

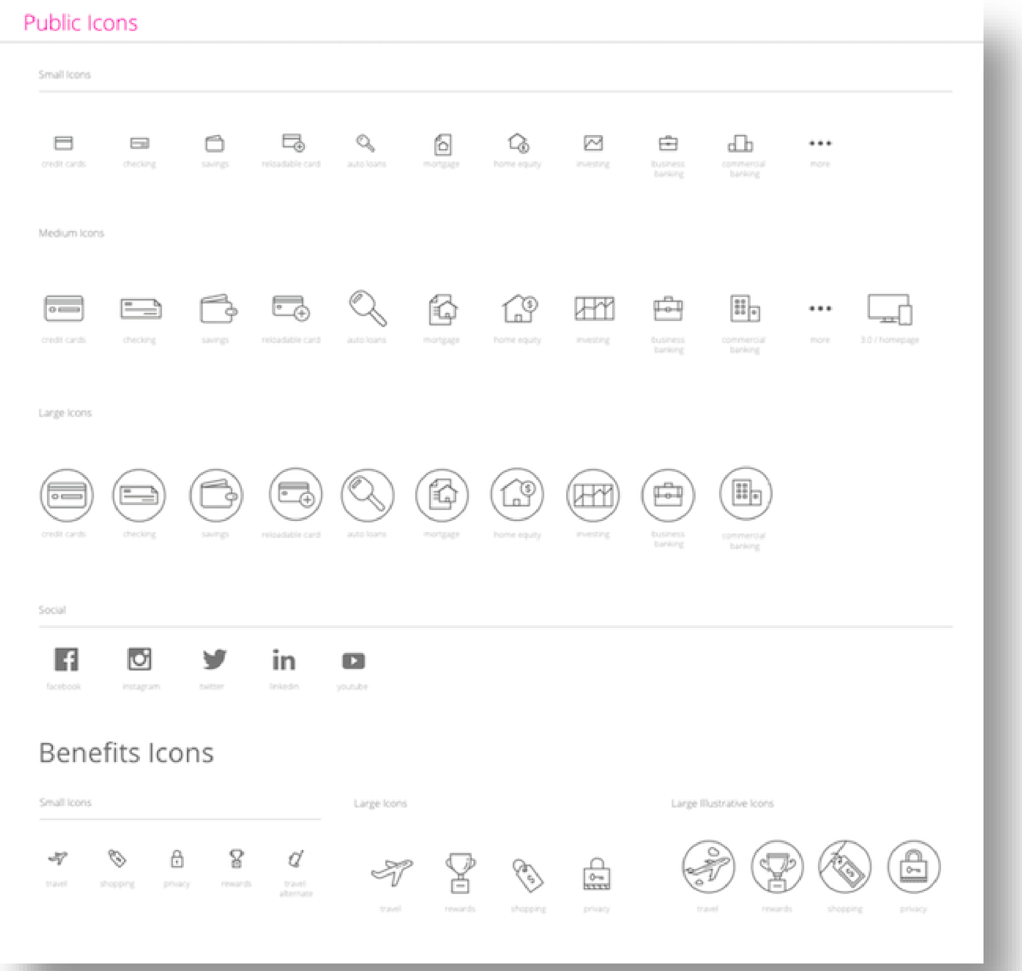
but

Good design systems have some important things in common:

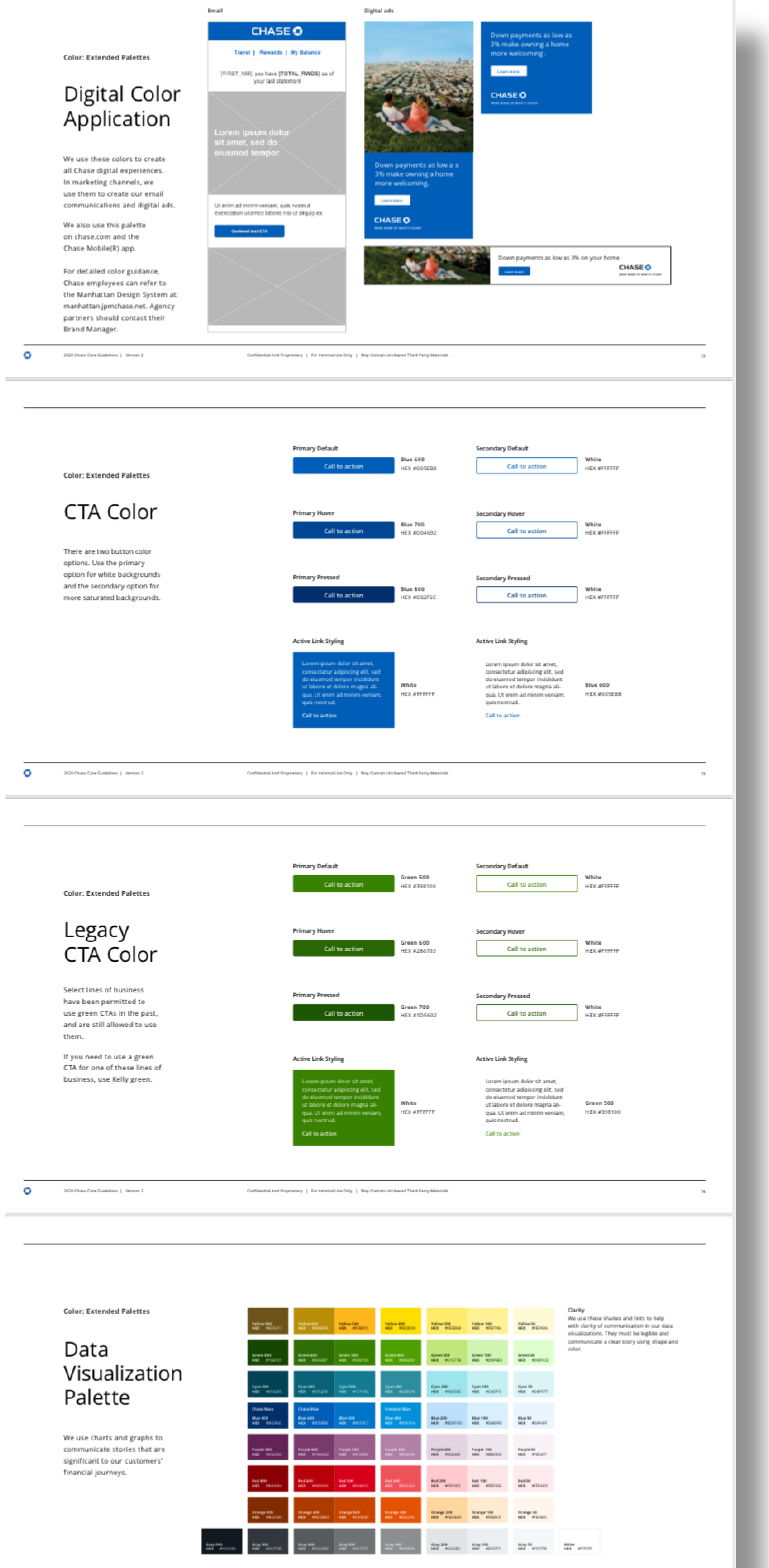
- Build for an audience:
  - Developers
  - Designers
  - Product Owners
- Be extensible across products
- Be extensible across devices
- Be a toolkit and go-to resource
- But be special sauce, too

Define our Design Tokens, Voice and tone and Masterbrand Guidelines



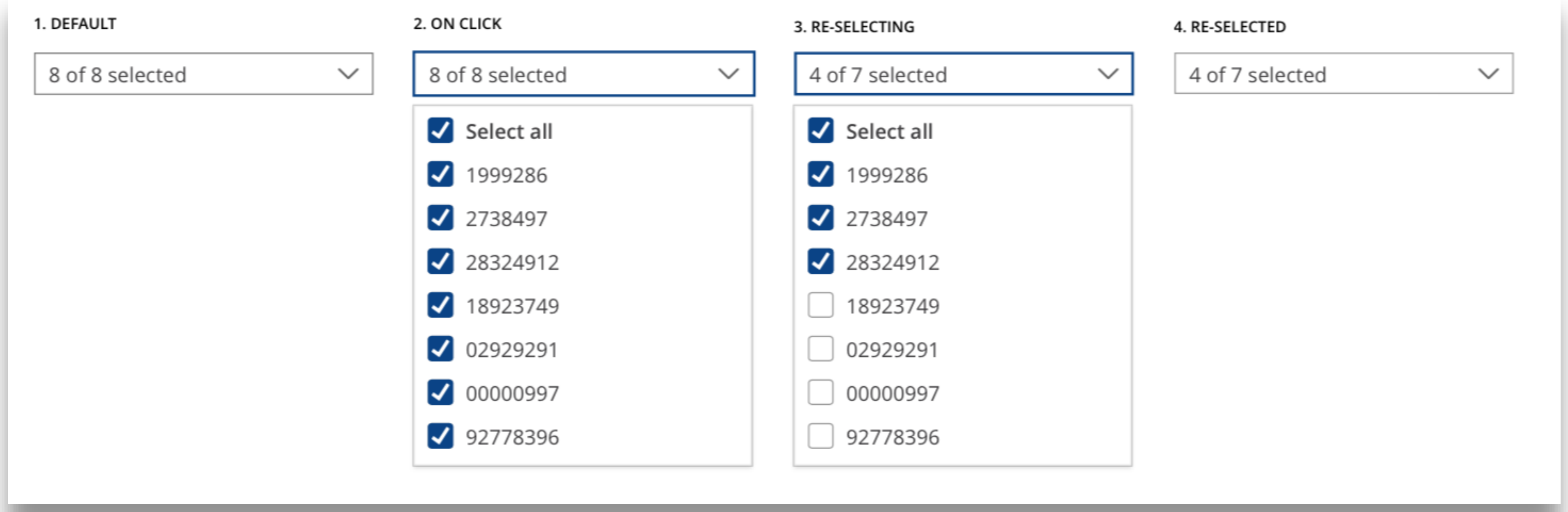


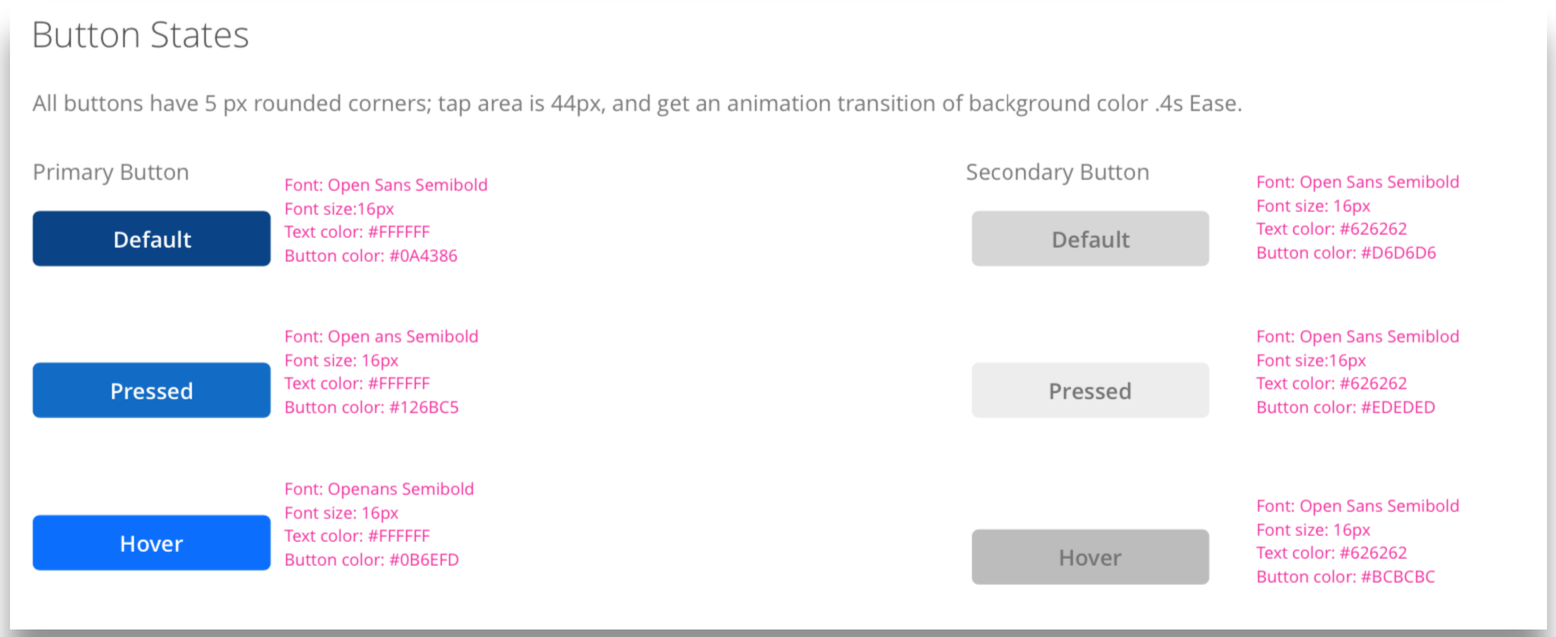
Menu fonts	Label	Type	Size	Color
Primary Menu	PRIMARY	Font: Open Sans Regular	Size: 24px	Color: #FFFFFF
Primary Menu(Selected)	PRIMARY SELECT	Font: Open Sans Semibold	Size: 24px	Color: #FFFFFF
Mobile Header	MOB HED	Font: Open Sans Light	Size: 24px	Color: #FFFFFF
Secondary Menu	SECOND	Font: Open Sans Regular	Size: 16px	Color: #414042
Secondary Menu(Selected)	SECOND SELECT	Font: Open Sans Semibold	Size: 16px	Color: #414042
Hamburger menu	MOB MENU	Font: Open Sans Regular	Size: 16px	Color: #FFFFFF
Hamburger menu(small)	MOB MENU SM	Font: Open Sans Regular	Size: 12px	Color: #FFFFFF
Search body	SEARCH BODY1	Font: Open Sans Regular	Size: 14px	Color: #FFFFFF
Search result link	SEARCH LINK	Font: Open Sans Regular	Size: 14px	Color: #6CC7FF
Headers	**Label**	**Type**	**Size**	**Color**
H1(Marketing header)	H1M	Font: Open Sans Light	Size: 40PX	Color: #414042
Hero unit	HU	Font: Open Sans reg	Size: 40PX	Color: #FFFFFF

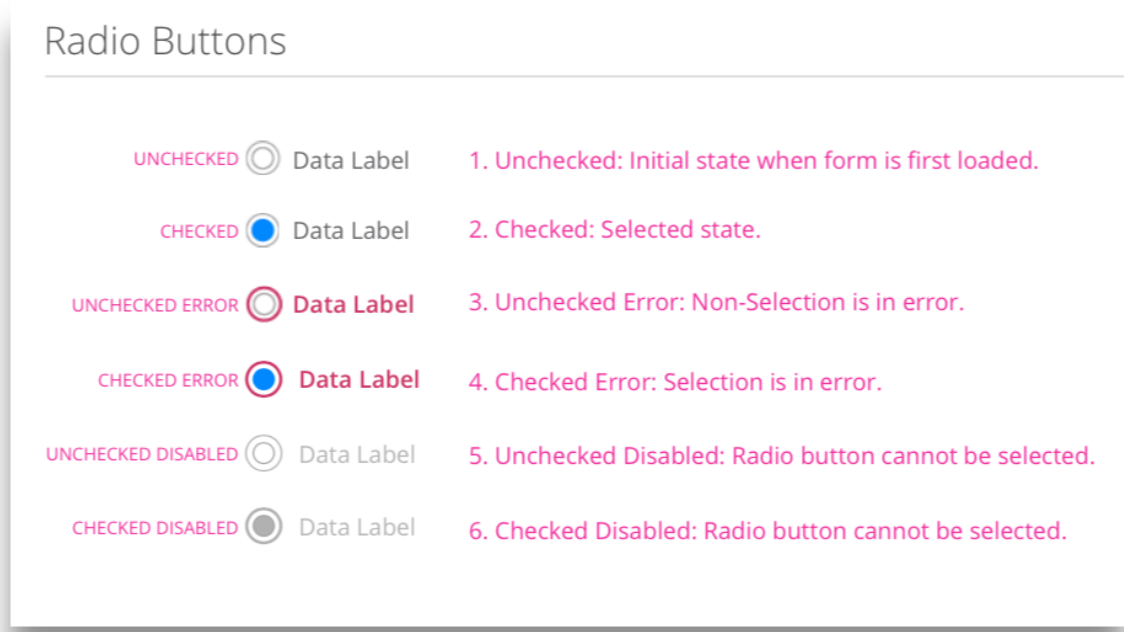


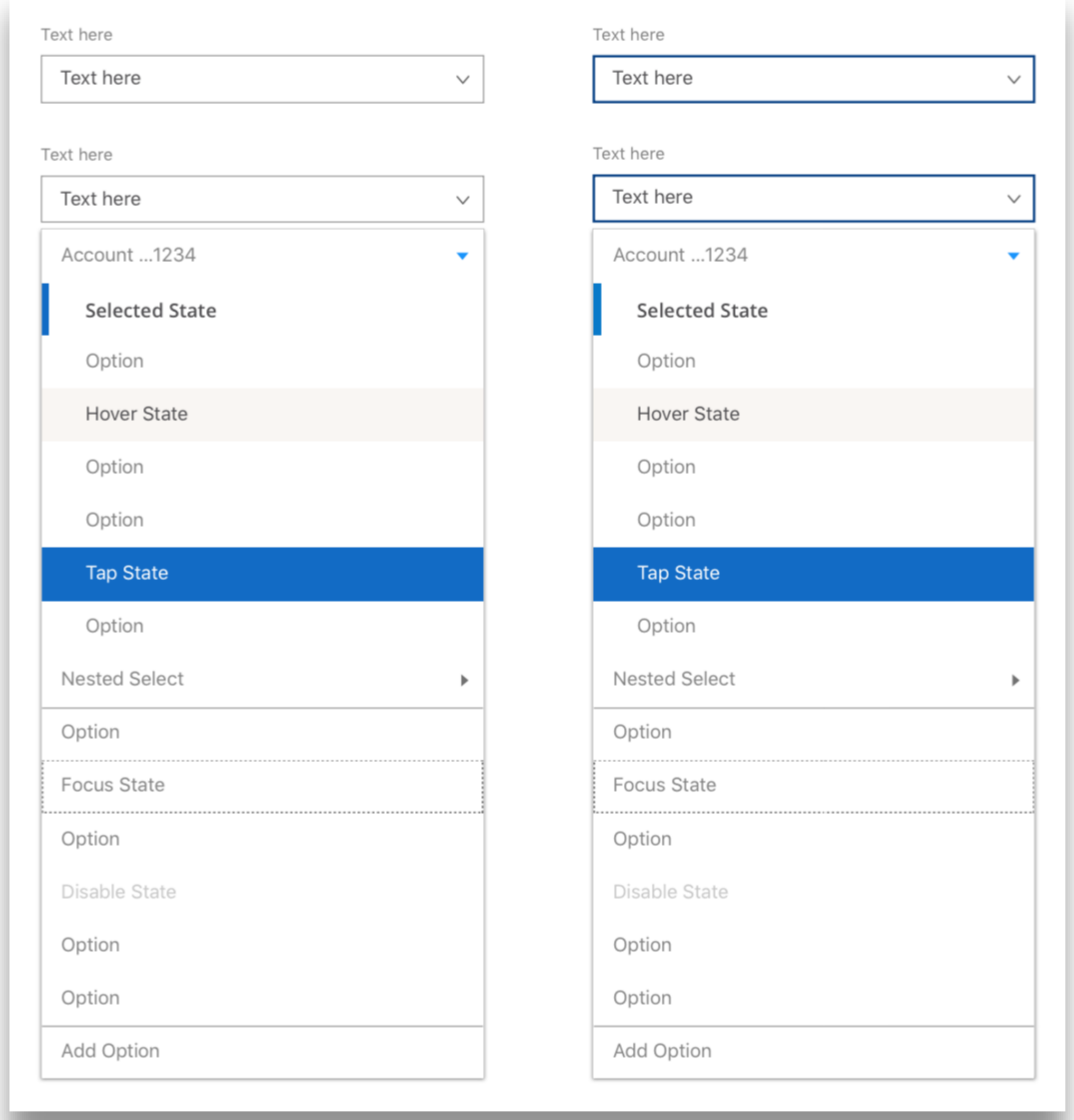
Components and interactions

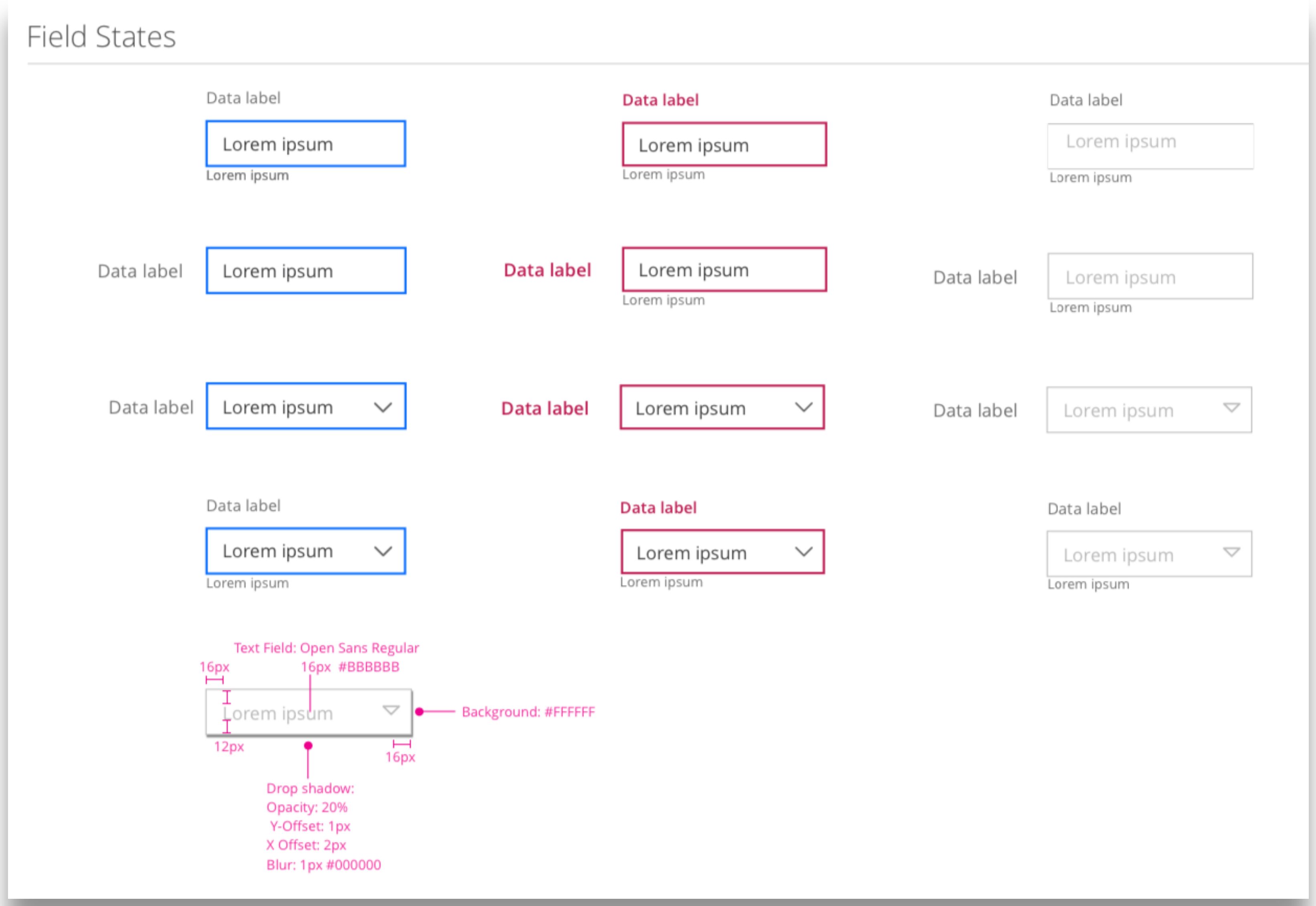
In the five years I have been with Chase Digital Technology scaled very fast with the design org growing from 75 to 450 as a centralized team.

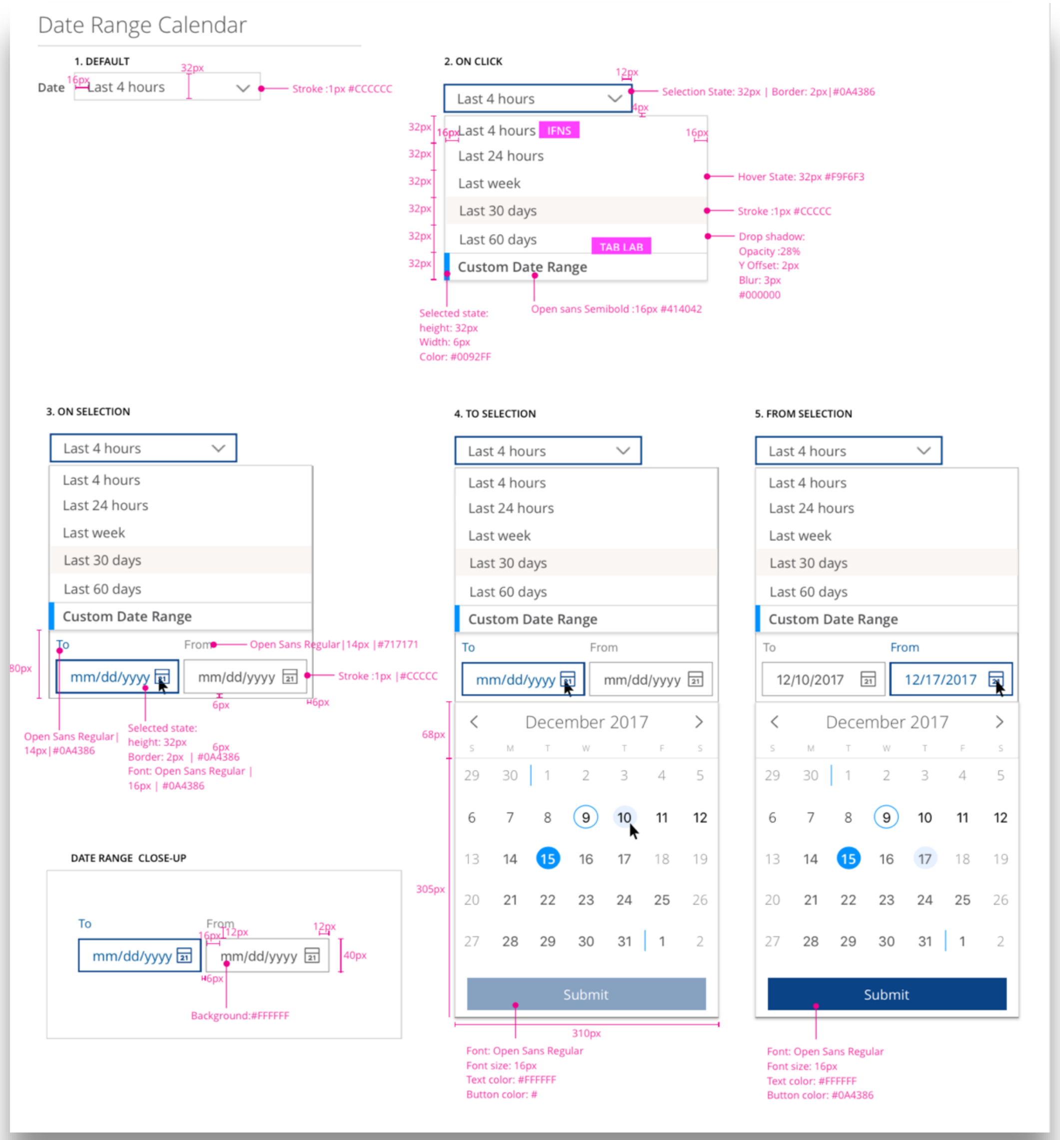




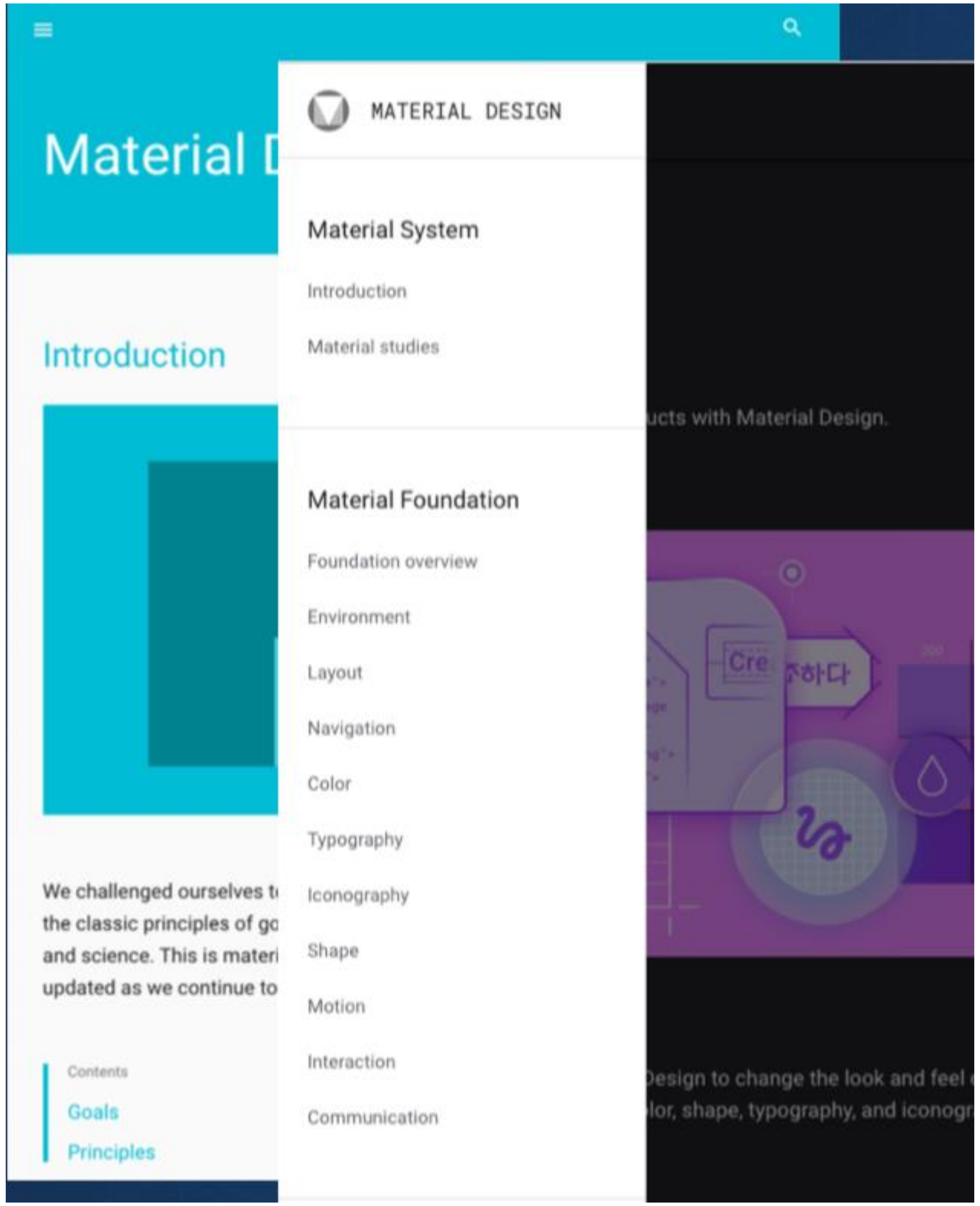


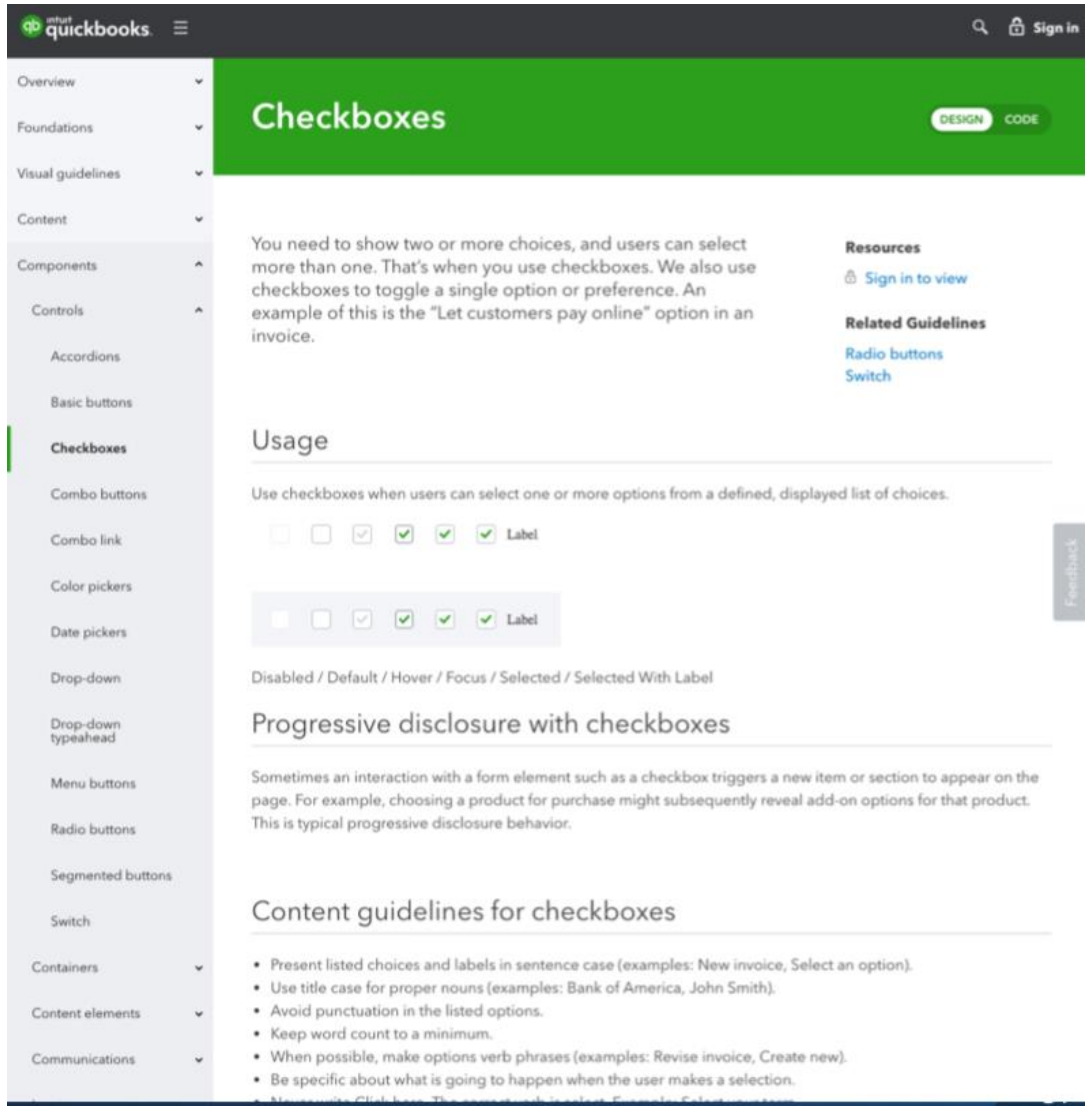


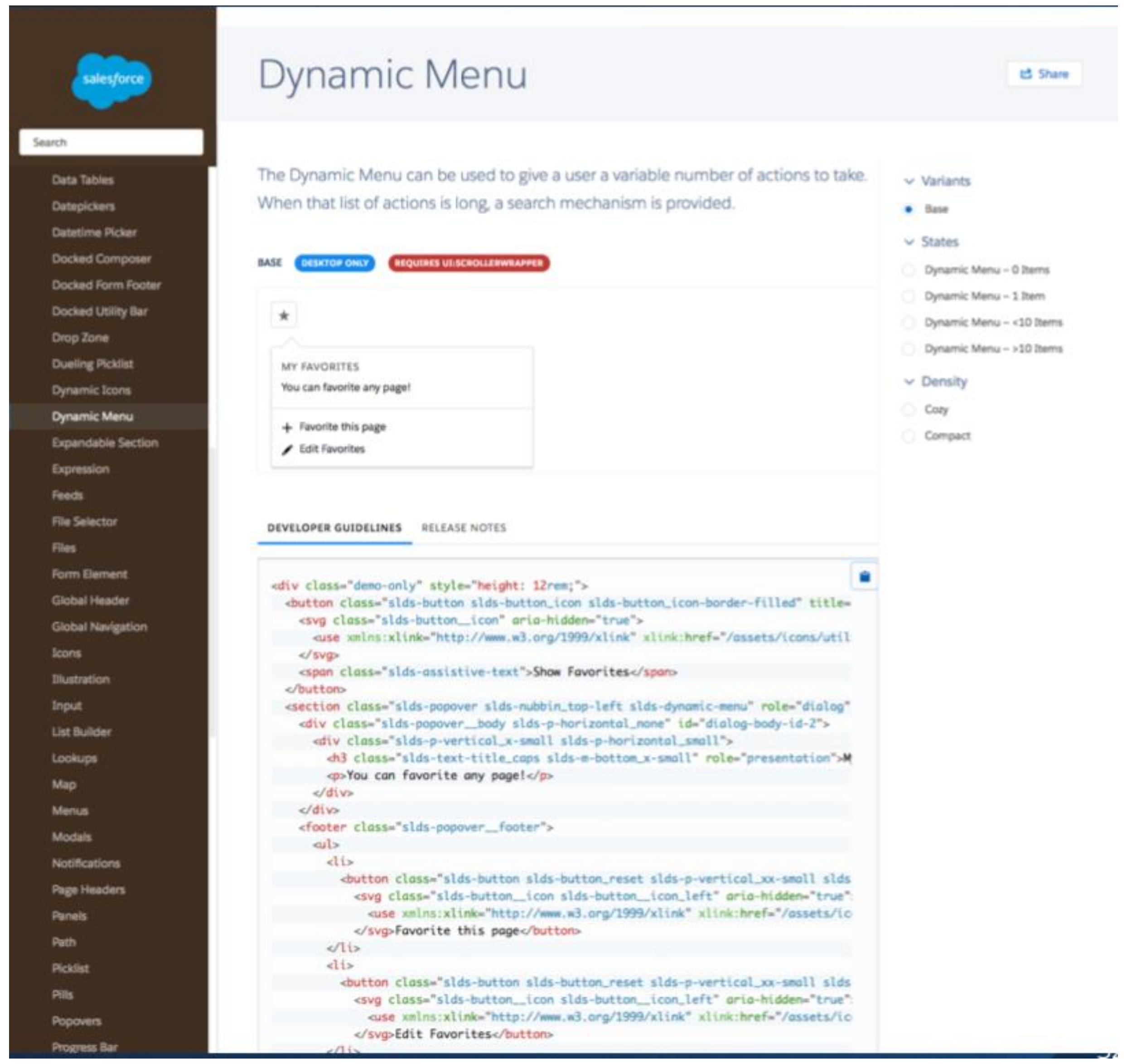


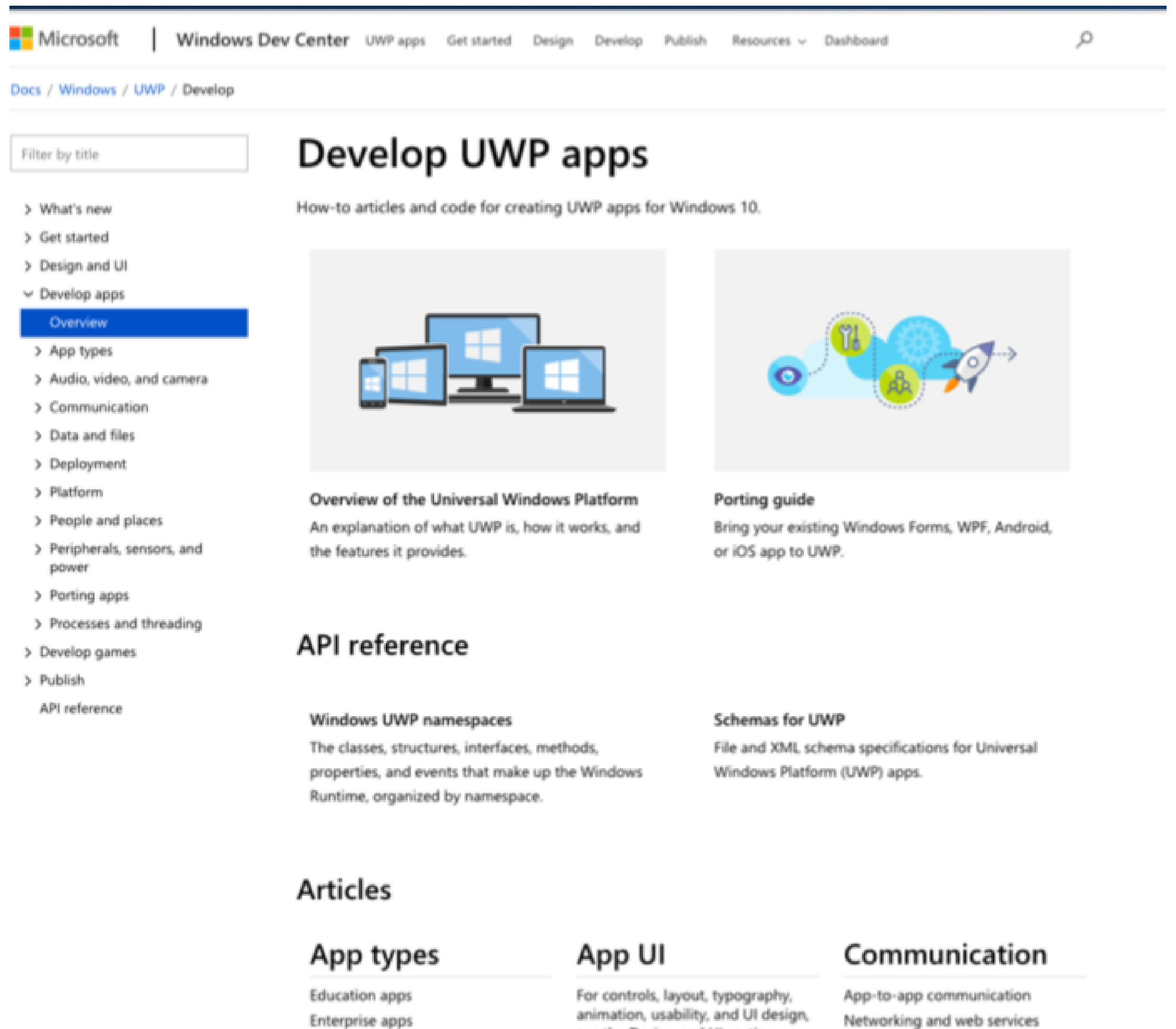


Competitive Analysis









Proposal Concepts

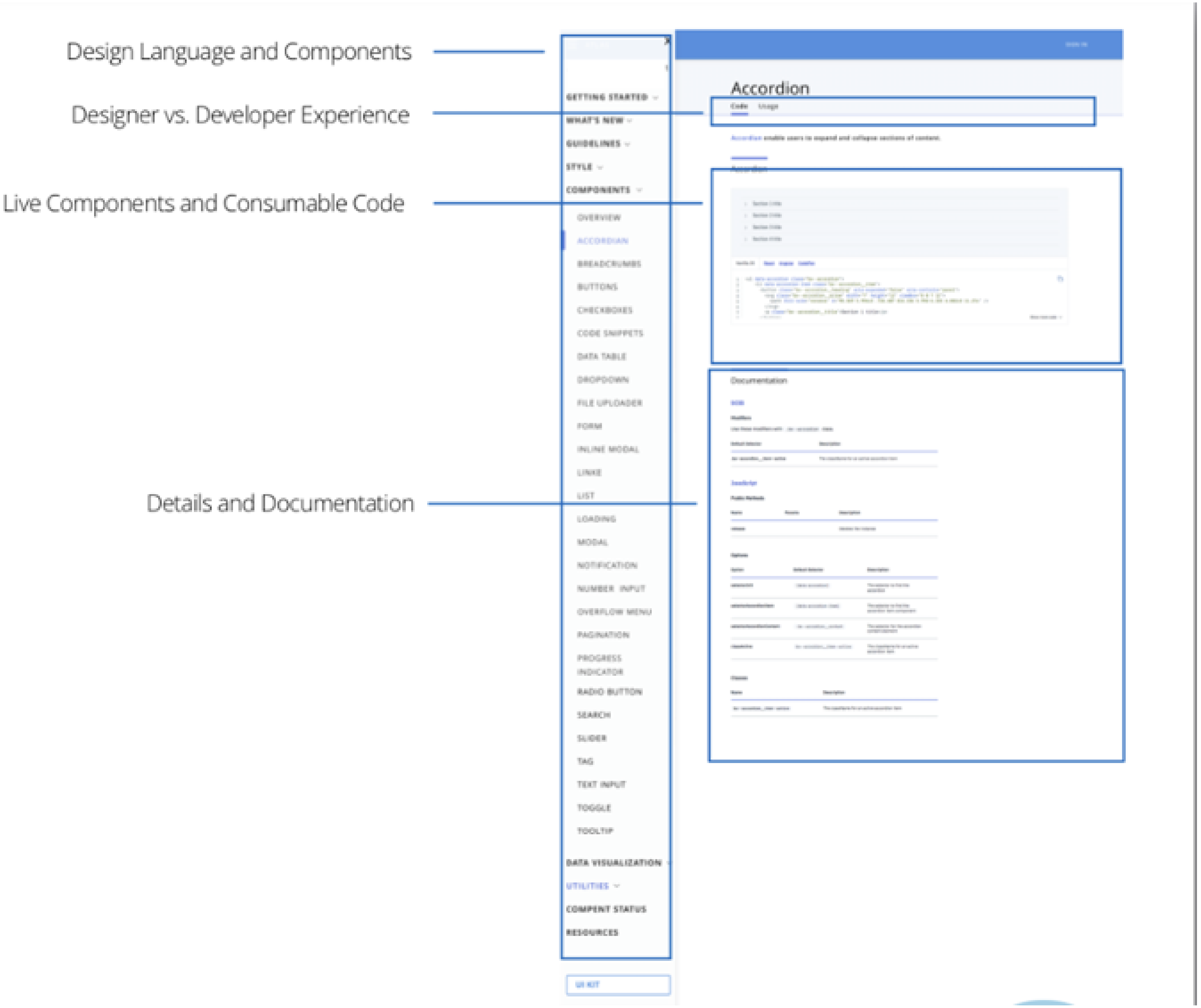
Centralized Communication Hub

Landing Page that integrates with other applications

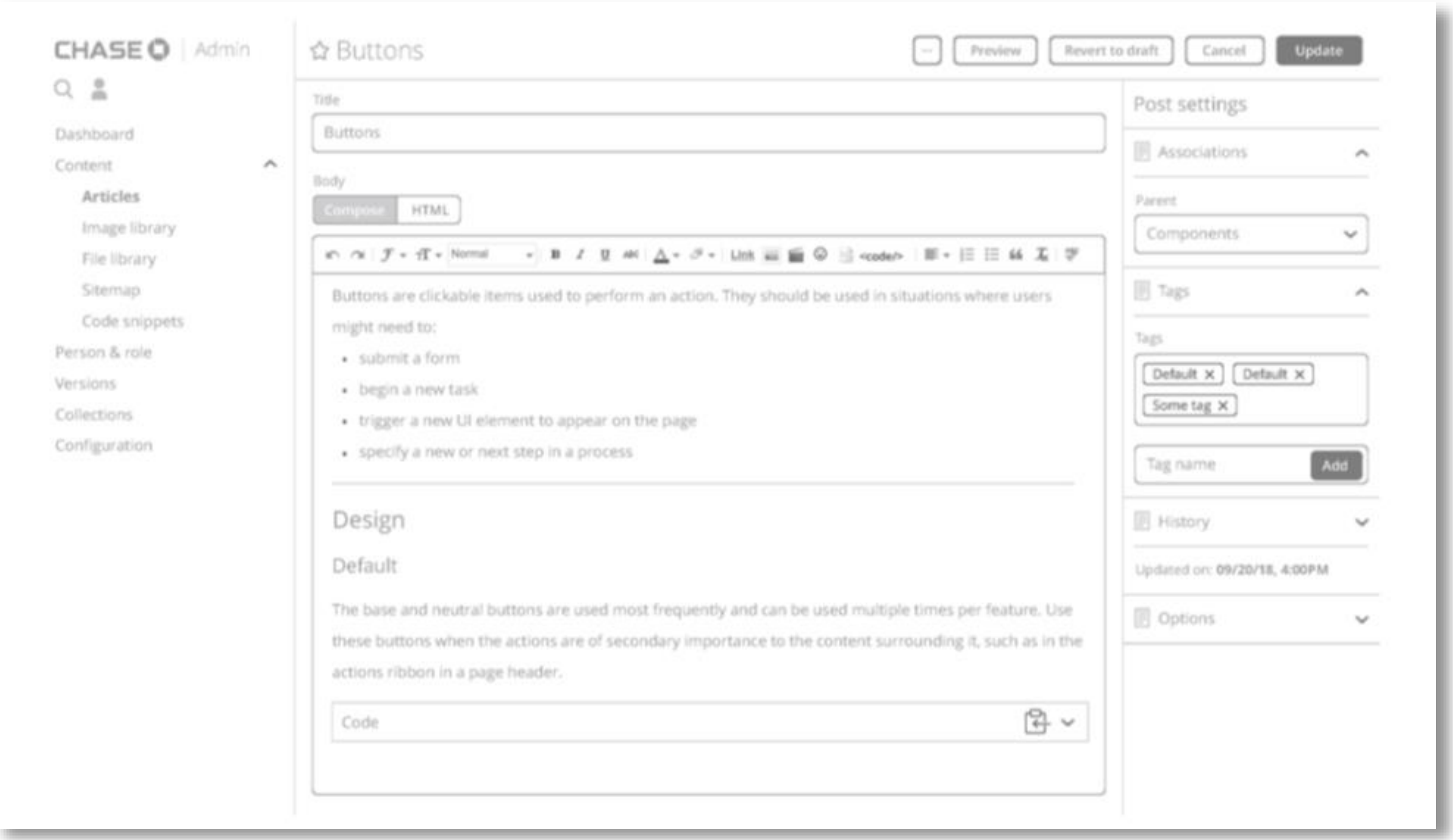
Getting started documentation to help the user know about first steps

What's new and online support

Component Library



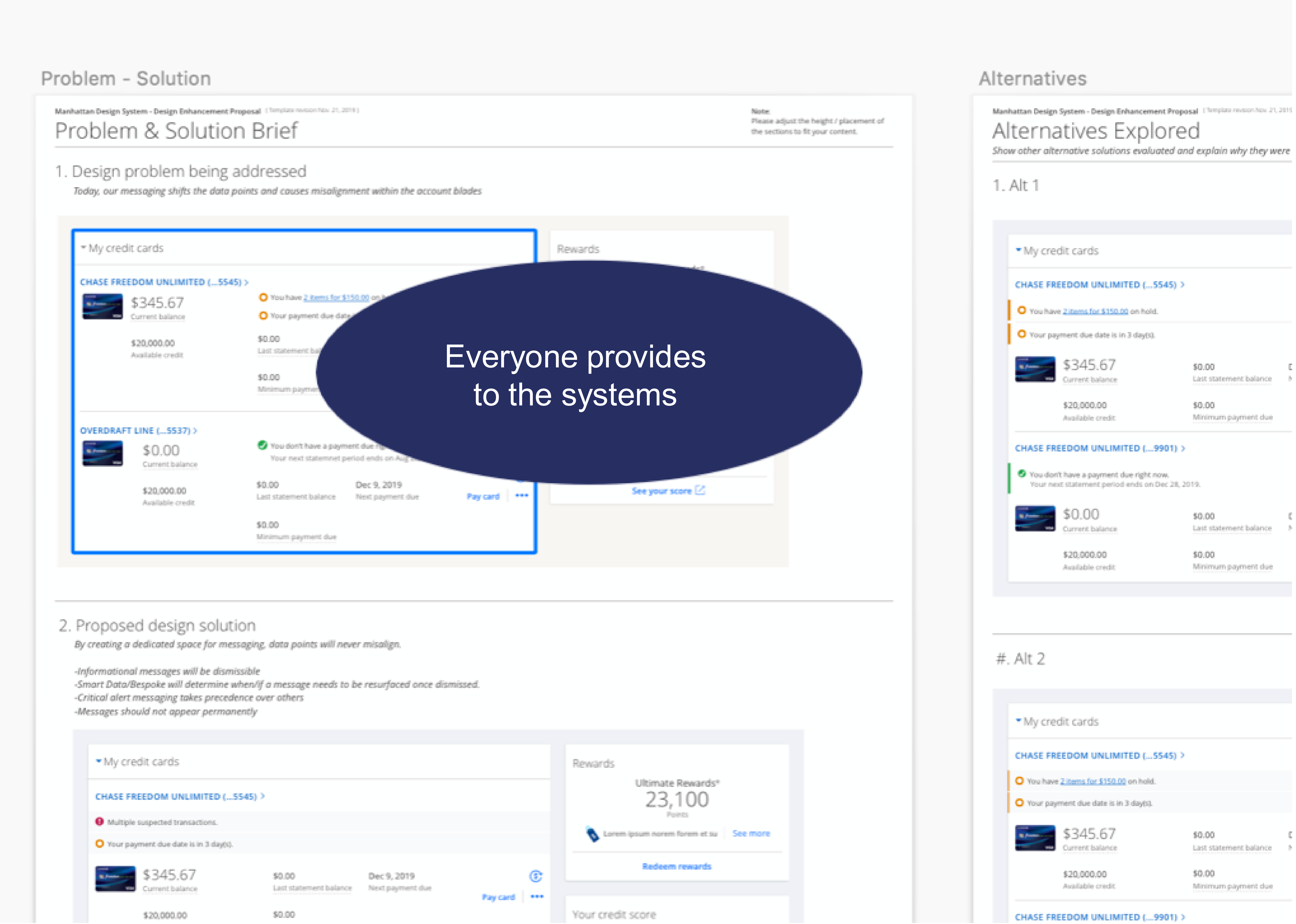
Content management support



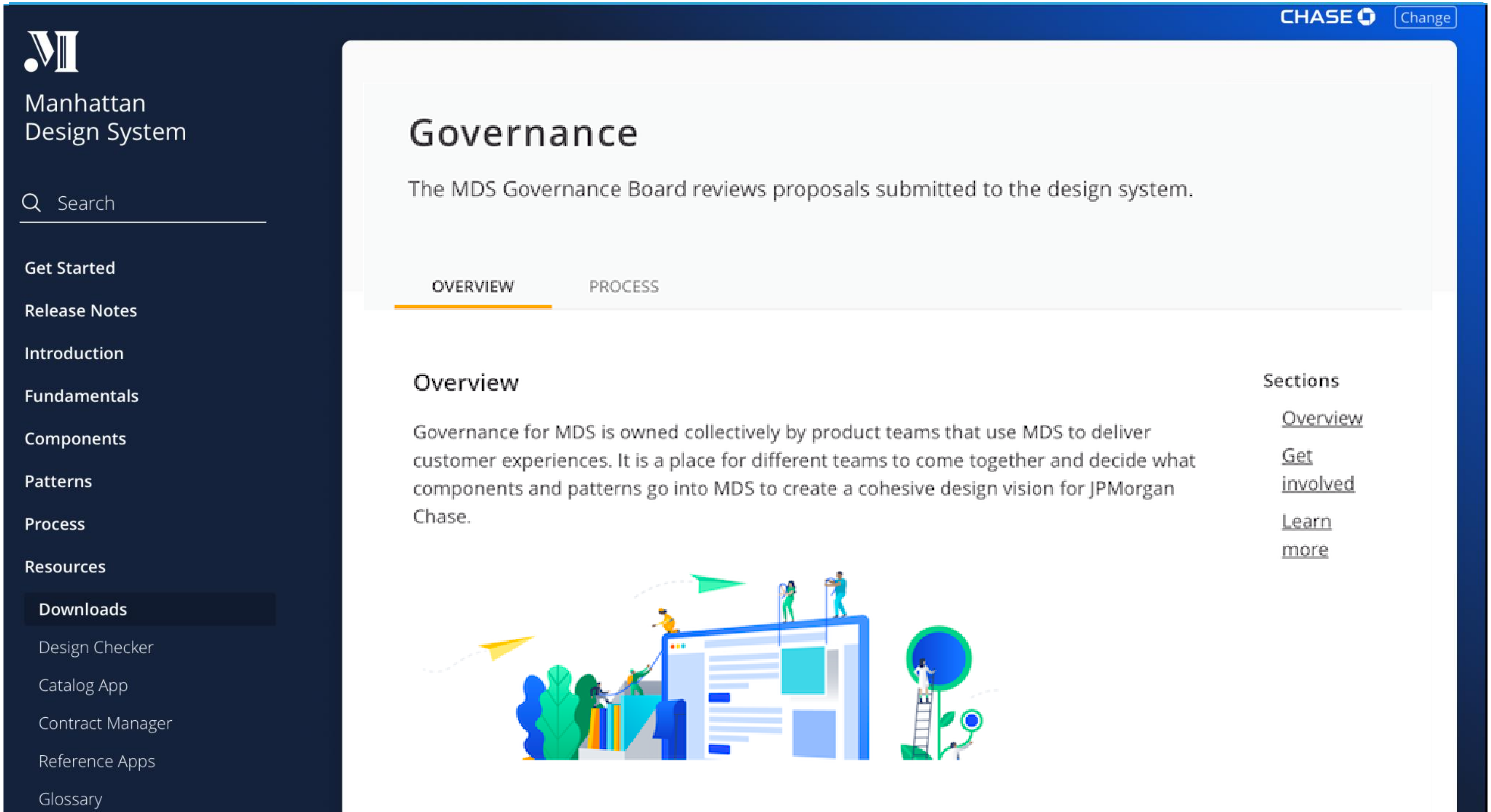
How can you contribute to MDS?

Proposal	Governance	Component Spec	Documentation
• Make a design proposal • Get feedback from other teams	• Evaluate based on scope of request • Give feedback or direction as needed	• Create a complete component spec • Join a design crit to give feedback on other specs	• Add to the use cases in documentation • Add symbols and examples to the UIKit

Design system briefs



Final


CHASE
Change
Manhattan Design System
Search
Get Started
Release Notes
Introduction
Fundamentals
Components
Patterns
Process
Resources
Downloads
Design Checker
Catalog App
Contract Manager
Reference Apps
Glossary
Governance
The MDS Governance Board reviews proposals submitted to the design system.
OVERVIEW
PROCESS
Overview
Governance for MDS is owned collectively by product teams that use MDS to deliver customer experiences. It is a place for different teams to come together and decide what components and patterns go into MDS to create a cohesive design vision for JPMorgan Chase.
Sections
Overview
Get involved
Learn more

Results – Organizations that adopted our systems