



This was a small project to launch a product that would allow users to view information on specific topics around best ways to incorporate financial best practice into your personal life.

## UX Design

1 UX Designer, Development team

Ongoing

## Continuous deployment

Work with project stakeholders to collect requirements. Spent time working through design iterations and reviews with stakeholders. Once we had a version 1 of the product we pulled in the development team to have review sessions.

To clean up the overall implementation of Salesforce and begin to modernize the design.

Product was well received

The screenshot displays the Salesforce user interface. At the top, there's a navigation bar with the Salesforce logo, a search bar labeled "Search Salesforce", and user profile icons. Below this is a secondary navigation bar with tabs: "My Salesforce", "Home", "My Customers", "My Pipeline", "My Activities", "My Goals", "Insights Hub", and "Thought Leadership".

The main content area features several interactive cards:

- Left Sidebar:** A vertical menu with icons and labels for Alerts, Favorites, Calendar (in progress), Accounts, Contacts (in progress), Support, Learn & Develop, Helpful Links, and Job Specific Items.
- Top Row of Cards:**
  - My Customers:** In Progress. Icon shows two people silhouettes.
  - My Pipeline:** Coming Soon. Icon shows a funnel.
  - My Activities:** In Progress. Icon shows a hand pointing at a screen.
- Middle Row of Cards:**
  - My Assets at Risk:** Coming Soon. Icon shows three nodes connected by lines.
  - My Goals:** Coming Soon. Icon shows a flag on a pole.
  - Other Items:** Icon shows a stack of papers.
- Bottom Section:**
  - Other Tools:** A section header above a card with a colorful geometric icon.
  - Thought Leadership & Marketing Collateral:** Coming Soon. Icon shows two stylized figures.
  - Other Items:** Another card with a stack of papers icon.
- Right Sidebar:** Titled "Chatter", it lists recent posts from "Jason Rogers - Design System" (5 Days ago). Each post includes a message preview and a "Like" button.

