

# MaxiBlues Fintech Application

UX Strategy for the World's Commercial Real Estate Leader

# A Global Force in Commercial Investment



**100+  
Countries**

Global Client Reach



**90 of  
Top 100**

Fortune 100 Companies  
Served



**Global  
#1**

Commercial Real Estate  
Services

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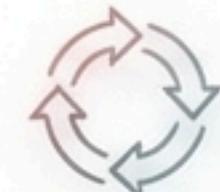
Capital Markets • Mortgage Brokerage • Loan Origination • Property Leasing • Valuation

# The Innovation Gap: Market Leadership vs. Technical Debt

## The Status



Strategic Partner



Investment Lifecycle Leader



Global Dominance



## The Reality



Lagging Technology



Payment Friction



User Opt-Outs

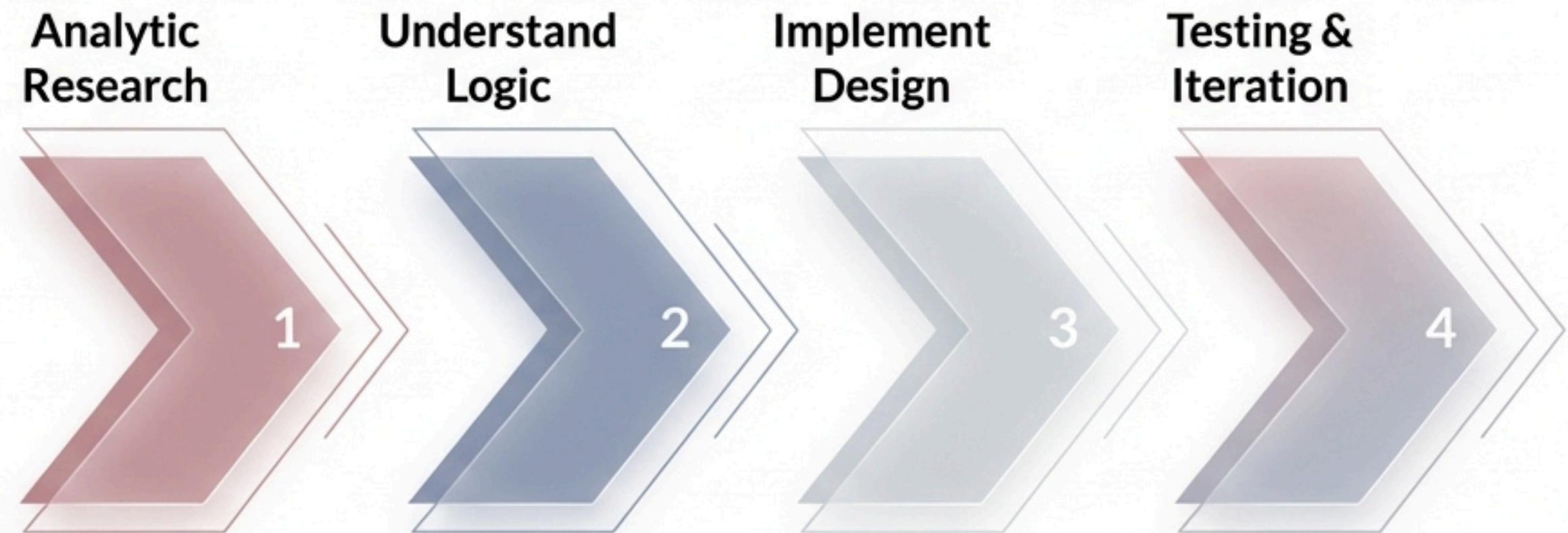
Objective: Enhance functionality beyond competitors to provide a hassle-free brokerage experience across all devices.

# Methodology & Team Structure

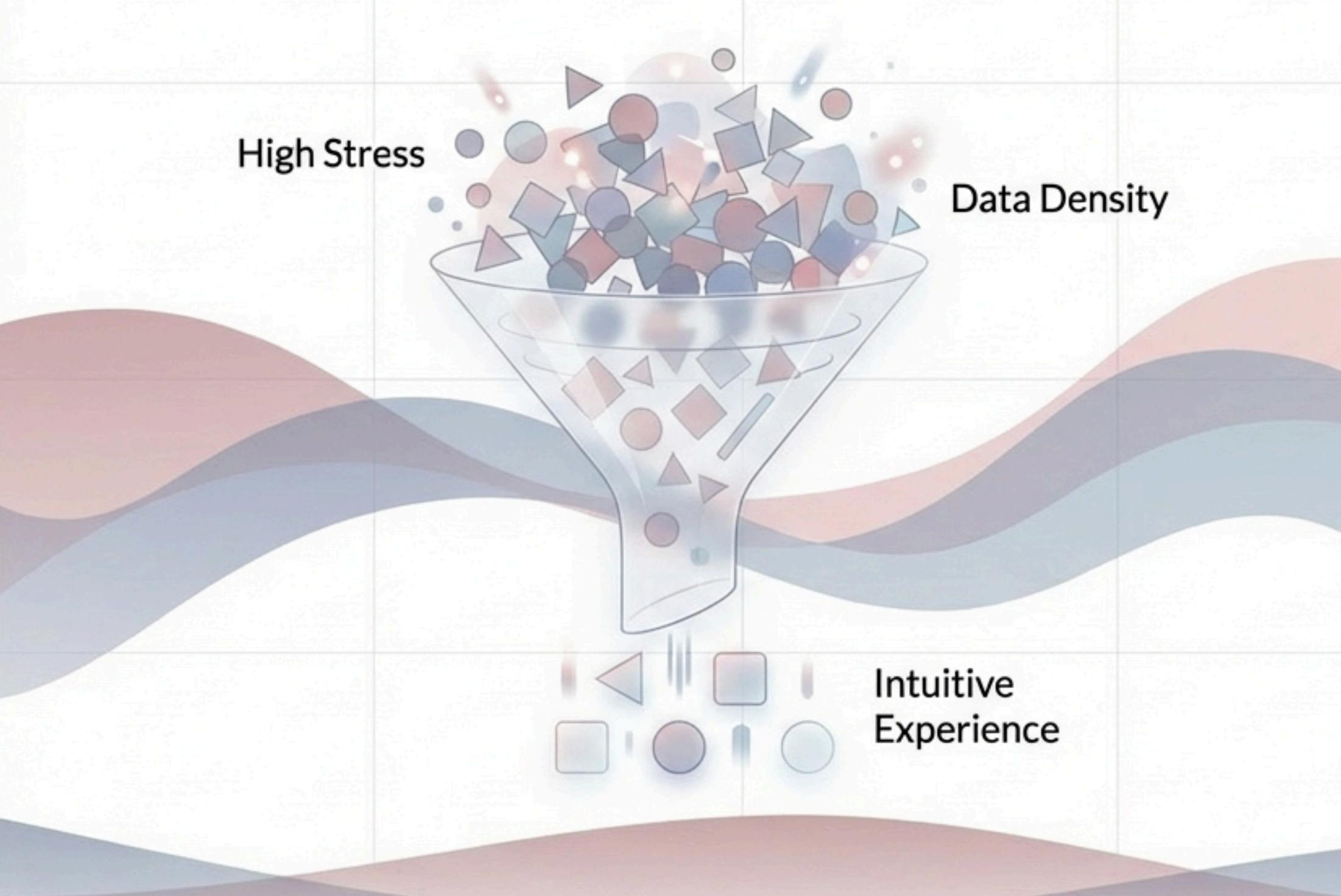
**Role:**  
Lead UX Designer  
(Strategy & Design)

**Support:**  
4 Junior Designers

**Challenge:**  
High-fidelity delivery  
under extreme time  
pressure.



# Design Philosophy: Cognitive Load Management



*“Given the high-stakes nature of Property Loans, my design process prioritizes Clarity over Complexity.”*

# Designing for High-Stakes Professionals

## C-Suite & Owners

Principal Owner, CFO,  
Controller

**Key Need:** Immediate oversight  
of multiple locations.

## Management

Property Managers,  
Admin Assistants

**Key Need:** Efficient daily task  
execution.

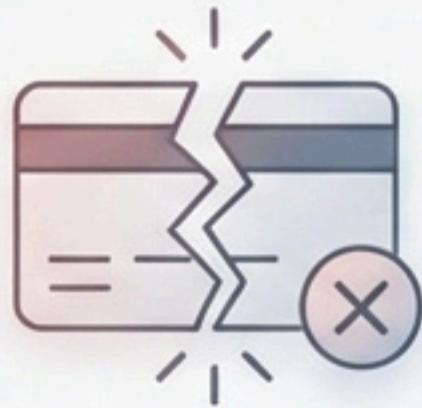
## Partners

Legal Counsel, Limited  
Partners

**Key Need:** Secure access to  
specific documents.

**Insight:** Users often manage multiple property loans simultaneously,  
requiring rapid context switching without data loss.

# Key Discovery & Friction Points



## Payment Failures.

The primary driver of user churn and service opt-outs.



## Unstructured Data.

Essential borrower insights are buried and hard to locate.



## Authentication Blocks.

Rigid 2FA prevents users from updating mobile numbers.



## Poor Mobility.

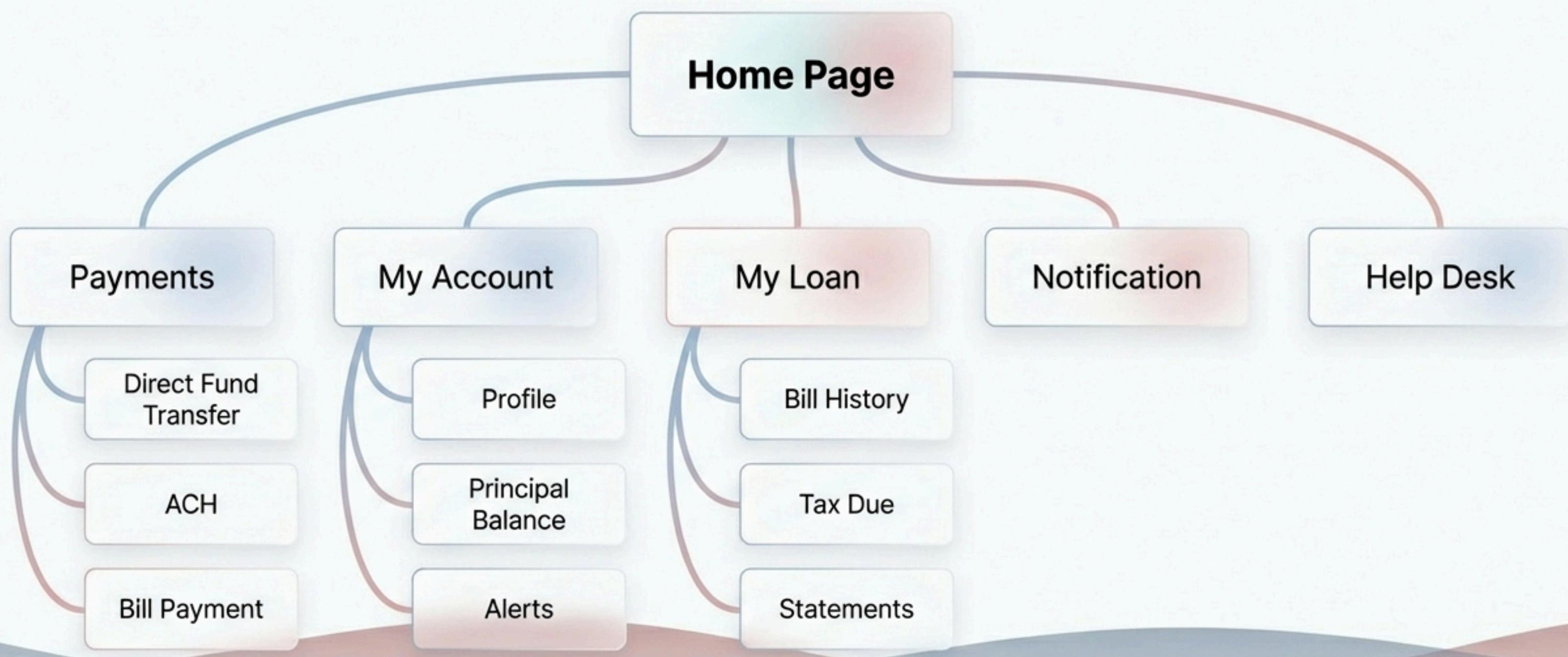
System unusable on tablets; lacks payment history tracking.

# Competitive Landscape & Benchmarking

	MaxiBlues (New)	Northland Corp	Parlmont Ent	West, Lane & Schlager
Application Mobility	✓	○	✓	○
Pay Transparency	✓	✓	○	○
Low Vulnerability	✓	○	○	✓
Payment Alerts	✓	✓	○	✓
Sitemap Hierarchy	✓	○	✓	○

Strategic Goal: Surpass competitors in usability and transparency.

# Information Architecture: Structuring the Financial Data



# Optimising the Payment Experience

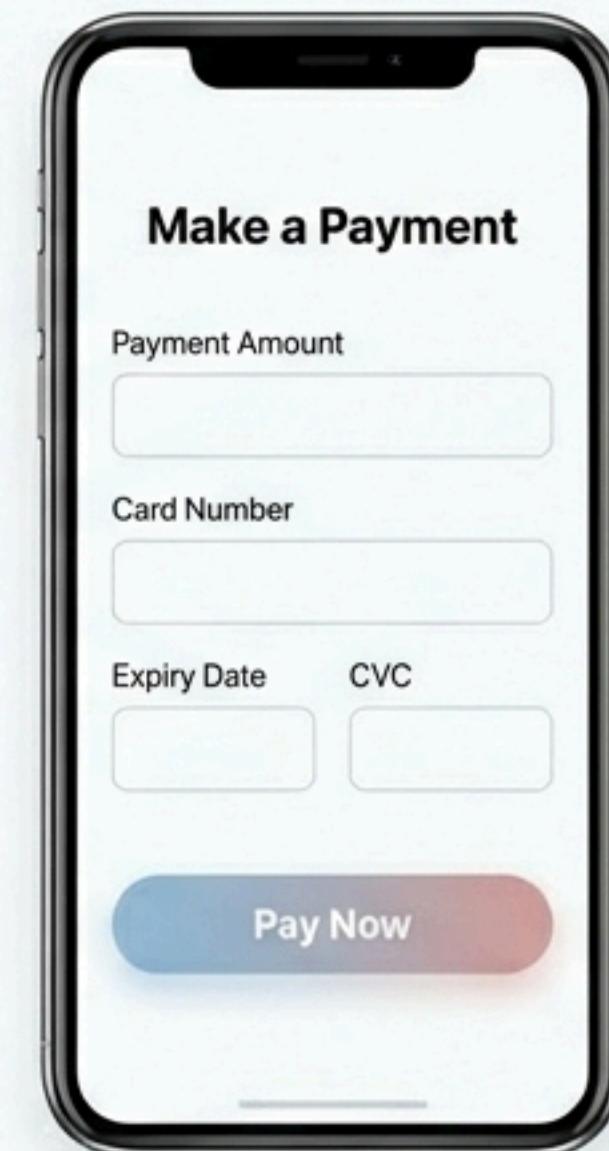
## Critical Data Fields

### Group 1: Direct Fund Transfer

- Loan Number
- Payment Due Date
- Paying Amount
- Bank Account
- Routing Number

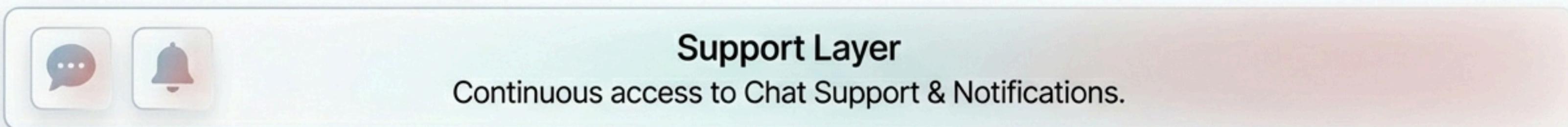
### ACH Transfer

- Draft Date
- Account Type
- Routing Number



Cognitive Load Management

# The User Journey: From Authentication to Transaction



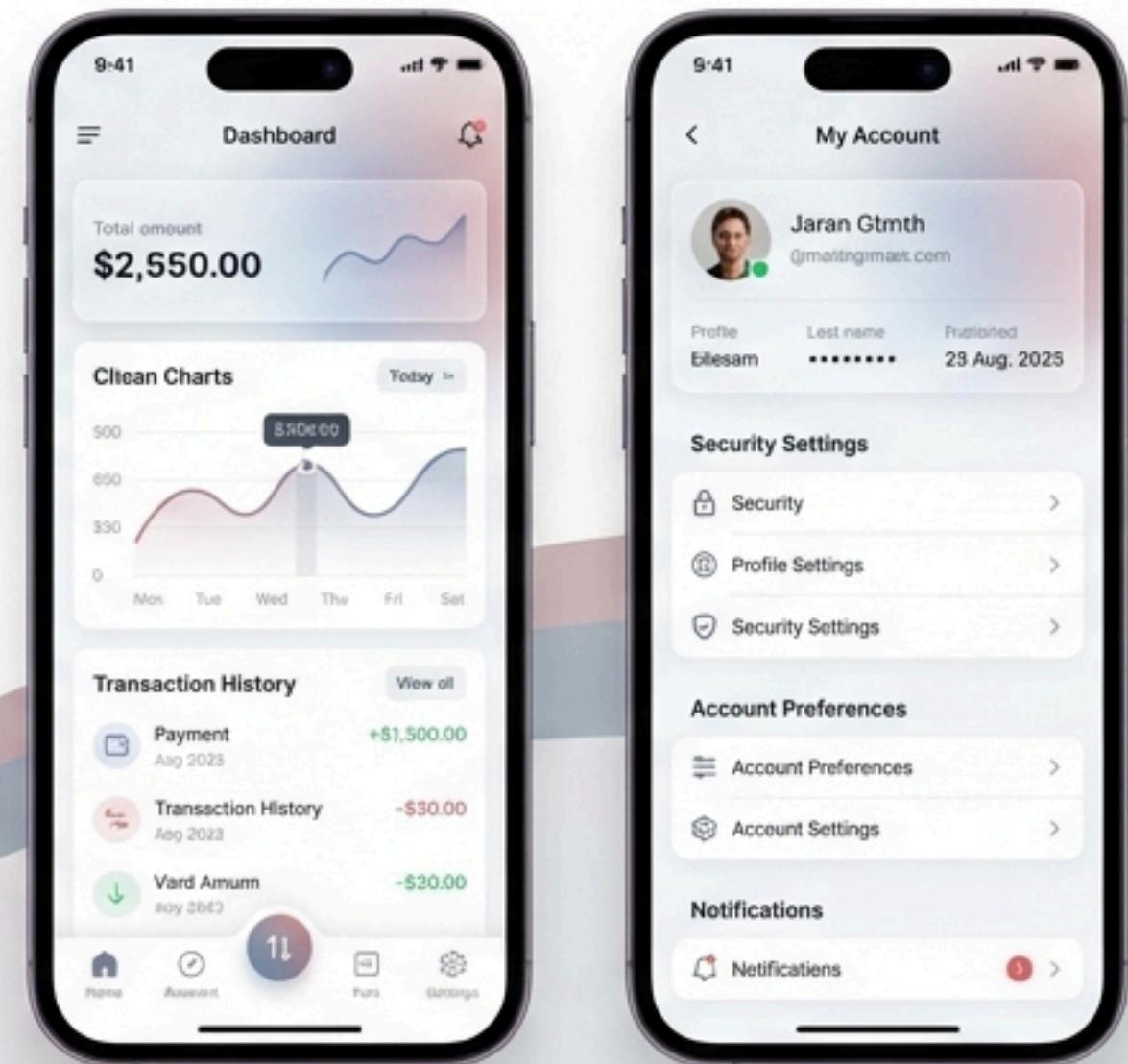
# Delivering Clarity at Scale

## Before:

Fragmented legacy system, high friction,  
user opt-outs.

## After:

Structured, mobile-responsive platform for  
high-stakes finance.



High-fidelity prototypes delivered for iOS and Android,  
aligning MaxiBlues with its global leadership status.