

IDX Brand Redesign

Global Components and Card Design

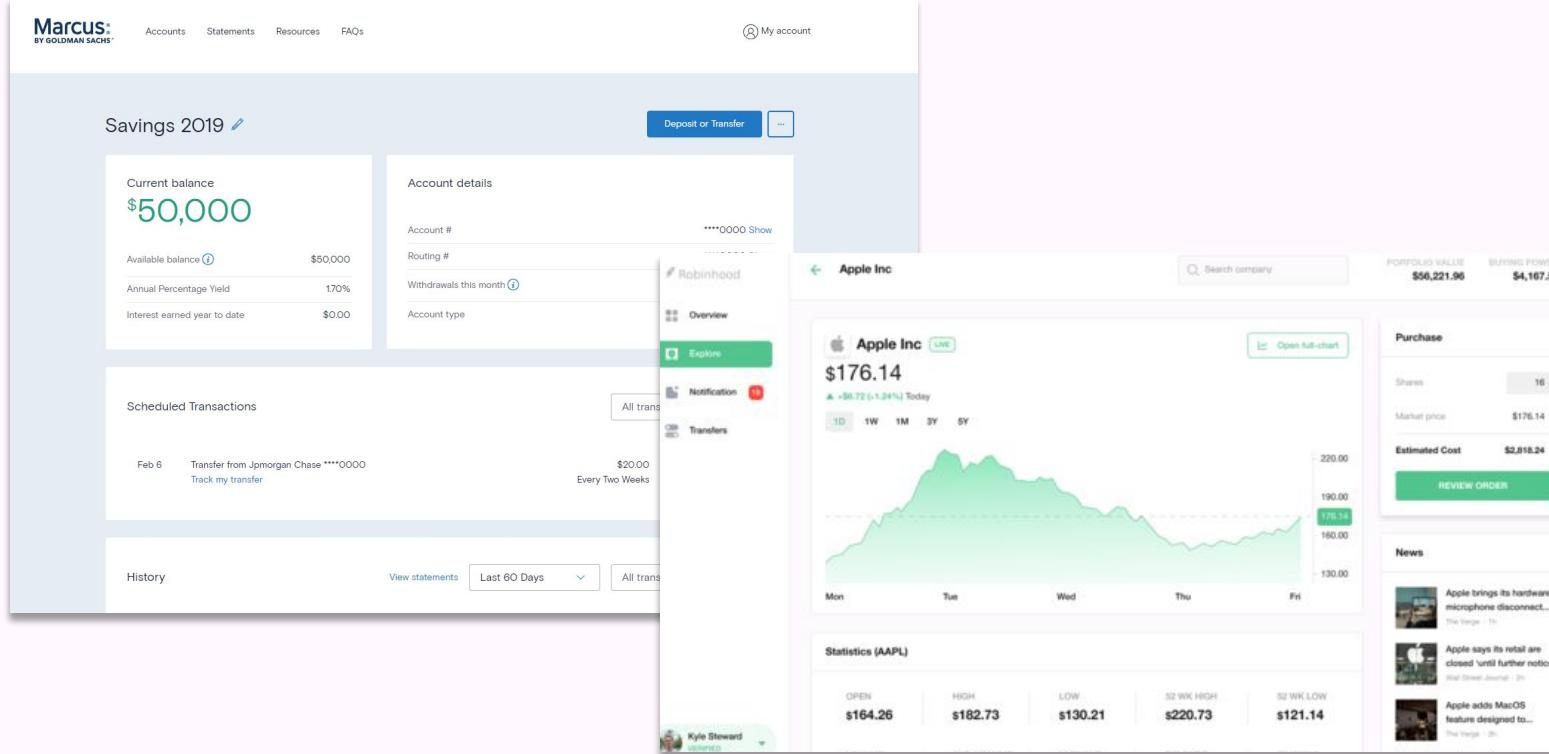
Lily Hu | BA Intern

Summer 2020

BX UX Team

introduction

card designs & global components



Typography

Display XL

Heading L

Paragraph M

Label S

Icons

Avatars

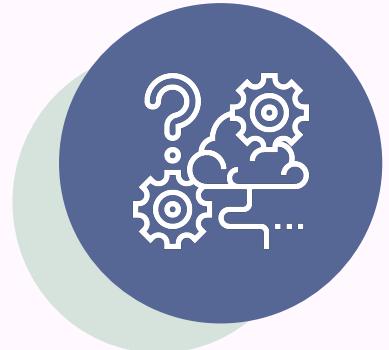
Buttons

A vertical color palette on the right side of the interface.

This section is a design system component showing various UI elements and their styles. It includes a color palette, typography examples (Display XL, Heading L, Paragraph M, Label S), icon sets, and a grid of buttons labeled "Label".

overview | strategy & execution | impact | projects | concluding remarks

product values



consistency



accessibility

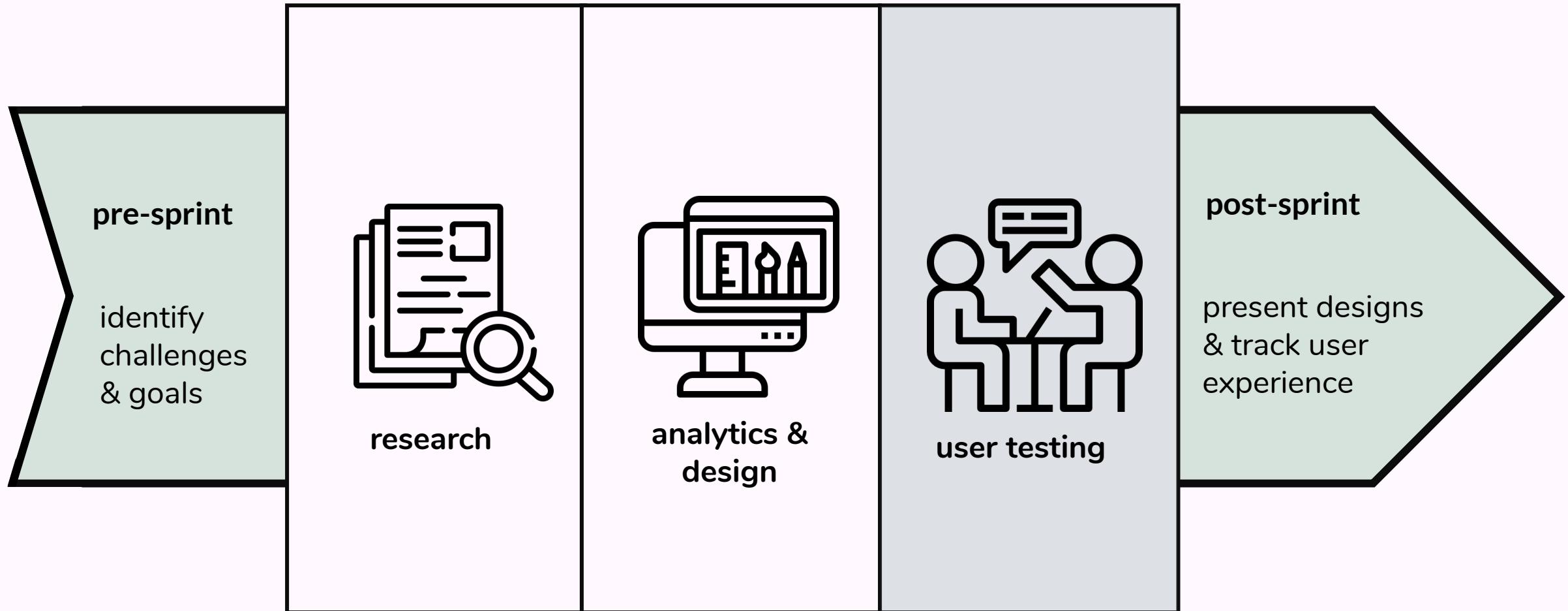


efficiency



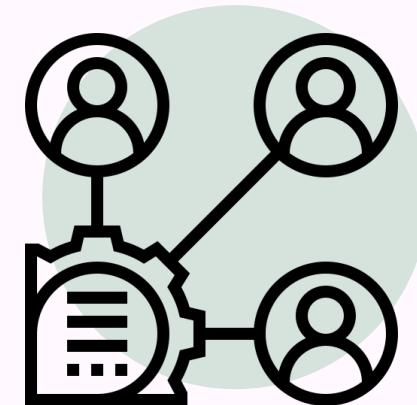
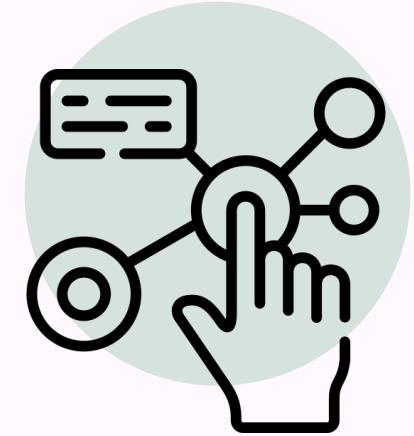
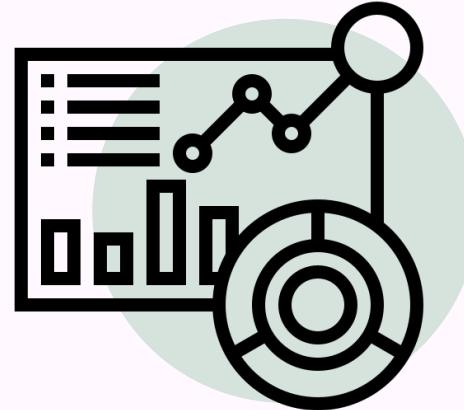
rebrand guidelines

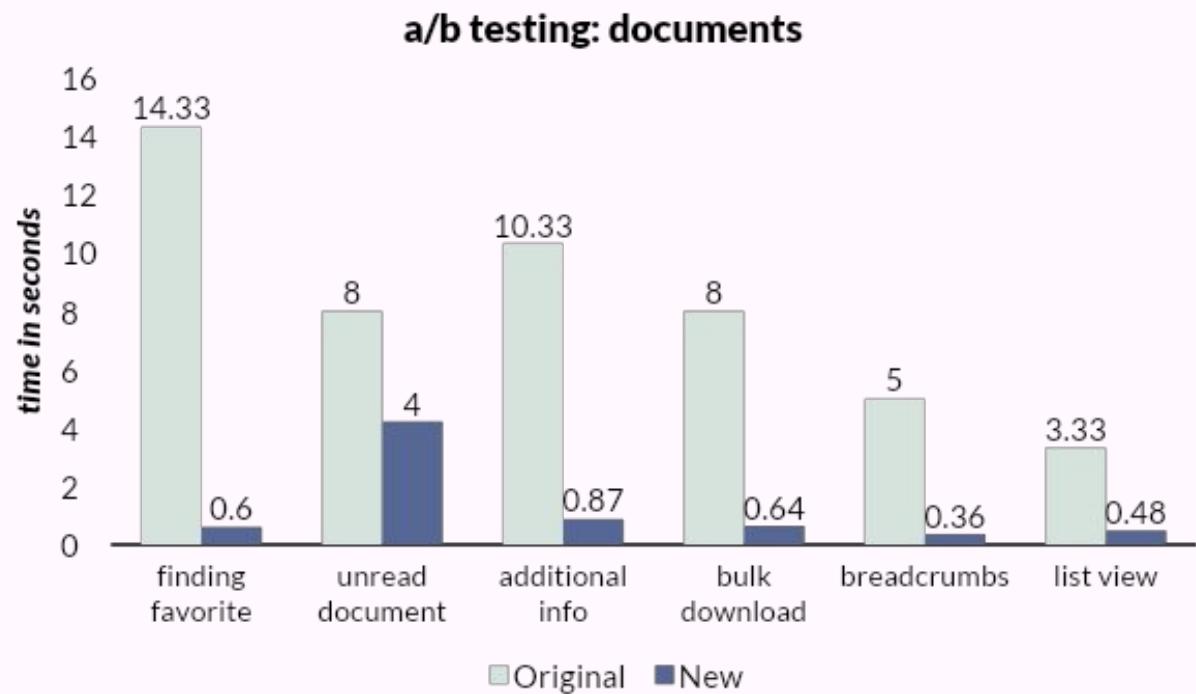
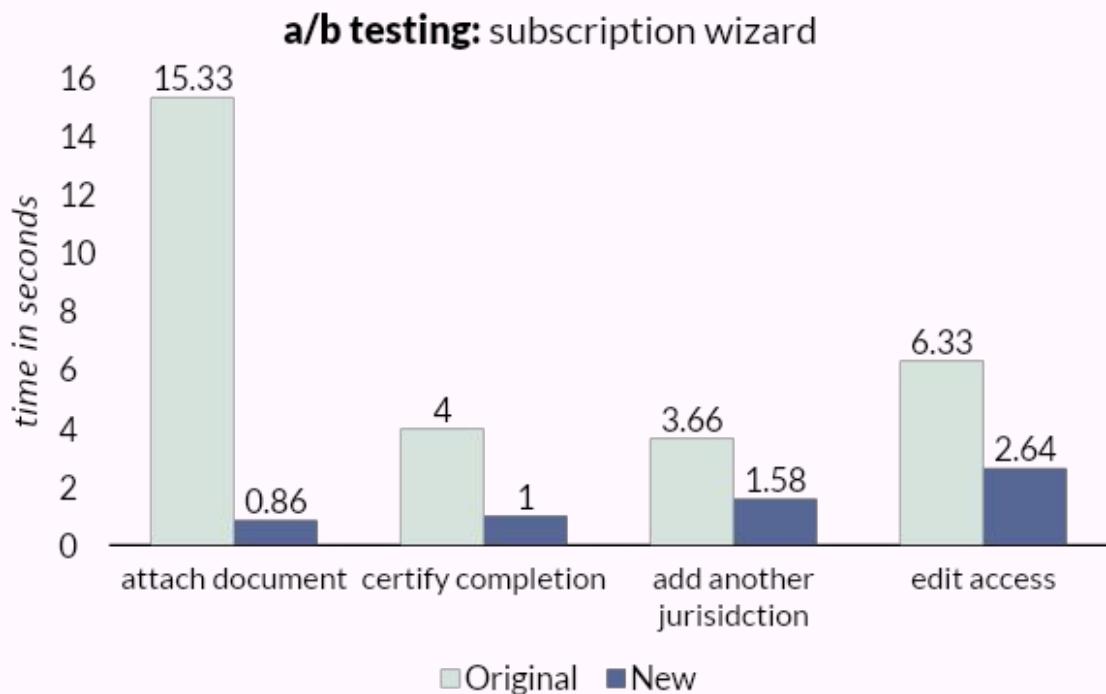
design sprint process



user testing

- engage **stakeholders** through user testing
- obtain **data-driven** design to measure success metrics
- understand user **interaction** by developing intuitive designs





original view

Blackstone

BREDS IV Subscription

SHARE PRINT SIGN

1 Eligibility 2 Investor Details 3 Owners 4 User Access 5 Banking 6 Complete and Sign

GENERAL INFORMATION

INVESTMENT VEHICLE LEGAL NAME

South Dakota Investment

RESIDENCE/LEGAL ADDRESS

LINE 1

mnrb

LINE 2

LINE 3

LINE 4

COUNTRY

United States

CITY

mnrb

STATE / PROVINCE

Alaska

POSTAL CODE

MAILING ADDRESS IS THE SAME AS PERMANENT ADDRESS

LEGAL ENTITY DETAILS

COUNTRY OF FORMATION

Select...

INVESTOR TYPE (FORM PF)

BROKER-DEALER

CRS TYPE

Financial Institution in Non-Participating Jurisdiction

TAX ID(S) & INFORMATION (1)

MY JURISDICTION DOES NOT ISSUE OR I AM UNABLE TO PROCURe A TIN OR FUNCTIONAL EQUIVALENT

True False

JURISDICTION

Anuba

SPECIFY THE REASON FOR NON-AVAILABILITY OF TIN OR FUNCTIONAL EQUIVALENT

[R]

+ ADD ADDITIONAL JURISDICTIONS OF RESIDENCY FOR TAX PURPOSES

I certify that for the purposes of taxation the Account Holder is not a tax resident in any other country other than those listed in the Tax ID(s) section. (If you need to add another tax jurisdiction/country, please click the add button.)

DOCUMENTS

Investors may be required to furnish other or additional documentation evidencing the authority to invest in the Partnership. The General Partner may waive any of the foregoing in its sole discretion.

TAX FORM

Each investor should fill in, sign, date and attach the appropriate form in accordance with the instructions to the form found here: W-8 EX

W-8 BEN, W-8 EGQ, W-8 IMY, W-8 BEN-E, W-9

ATTACH

BXA_BV_QA_resources_Sc...

TYPE

W-8 BEN

X

X

SOURCE OF FUNDS

SOURCE OF FUNDS

ATTACH

AUTHORIZED SIGNATORIES

SIGNATORY DETAILS

FIRST

nkj

MIDDLE

LAST

true

EMAIL

tgku@aa.com

IDENTIFICATION

ATTACH

BXA_BV_QA_resources_Scripts_DataItemMappingScript.xlsx X

EVIDENCE OF AUTHORIZATION (1)

Attach documentation listing all individuals with authority to sign on behalf of the investing entity. Examples include trust agreement, operating agreement, certificate of formation, partnership certificate, certified corporate resolutions, certificate of incorporation, etc.

AUTHORIZATION ATTACH BXA_BV_QA_resources_Scripts_DataItemMappingScript.xlsx X

+ ADD ADDITIONAL AUTHORIZED SIGNATORIES

BACK

SAVE

NEXT

initial iteration

Tommy Otten (Individual) Incomplete

GENERAL INFORMATION

First Name *	First Name *
Middle Name	Middle Name
Last Name *	Last Name *
Suffix	Suffix

RESIDENCE/LEGAL ADDRESS

First Name *	First Name *
Middle Name	Middle Name
Last Name *	Last Name *
Suffix	Suffix

Mailing Address is the same as permanent address

TAX ID(S) AND INFORMATION

My jurisdiction does not issue or I am unable to procure a state or functional equivalent: True False

Jurisdiction *	Tax ID Type *
	Tax ID Number *

Add Additional Jurisdictions of Residency for Tax Purposes

I certify that for the purpose of taxation the Account Holder is not a tax resident in any other country other than those listed in the Tax ID(s) section. (If you need to add another tax jurisdiction/country, please click the add button.)

DOCUMENTS

Investors may be requested to furnish other or additional documentation evidencing the authority to invest in the Partnership. The General Partner may waive any of the foregoing in its sole discretion.

TAX FORM

Each investor should fill in, sign, date and attach the appropriate form in accordance with the instructions to the form found here: W-8 EXP, W-B BEN, W-B EO, W-B IMY, W-B BEV/E, W-9

Tax ID Type *

[Click here to upload](#) JV2.pdf  Tax ID Type *

[JV2.xlsx](#)  Tax ID Type *

[JV2.pdf](#)  Tax ID Type *

SOURCE OF FUNDS

Investors may be required to furnish a copy of a financial statement which shows the investor is purchasing interests in the Partnership. Examples include the first page of the investor's bank statement, or an annual certificate from the investor indicating the nature of the investor's business and the source of the investor's funds. Investors may be requested to furnish other or additional documentation evidencing the source of funds used to invest in the Partnership.

Jurisdiction *

Source of Funds Type * [Click here to upload](#)

IDENTIFICATION

Individuals should provide a copy of a passport or a driver's license with photograph and their country of citizenship. If the passport or driver's license does not contain the individual's current address or an additional government issued identification document certifying the individual's name and current address is required.

Identification Type * [Click here to upload](#) JV2.pdf  Tax ID Type *

[JV2.xlsx](#)  Tax ID Type *

AUTHORIZED SIGNATURES

Signature Details

First Name *	First Name *
Middle Name	Middle Name
Last Name *	Last Name *

Identification * [Click here to upload](#)

EVIDENCE OF AUTHORIZATION

An individual investor's signature alone is not sufficient to act on his/her behalf. Additional documentation such as a power of attorney, certificate of authority, photocopy of the passport or driver's license or an additional government issued identification document certifying the individual's name and current address is required.

Evidence of Authorization * [Click here to upload](#)

SAMPLE SIGNATURE

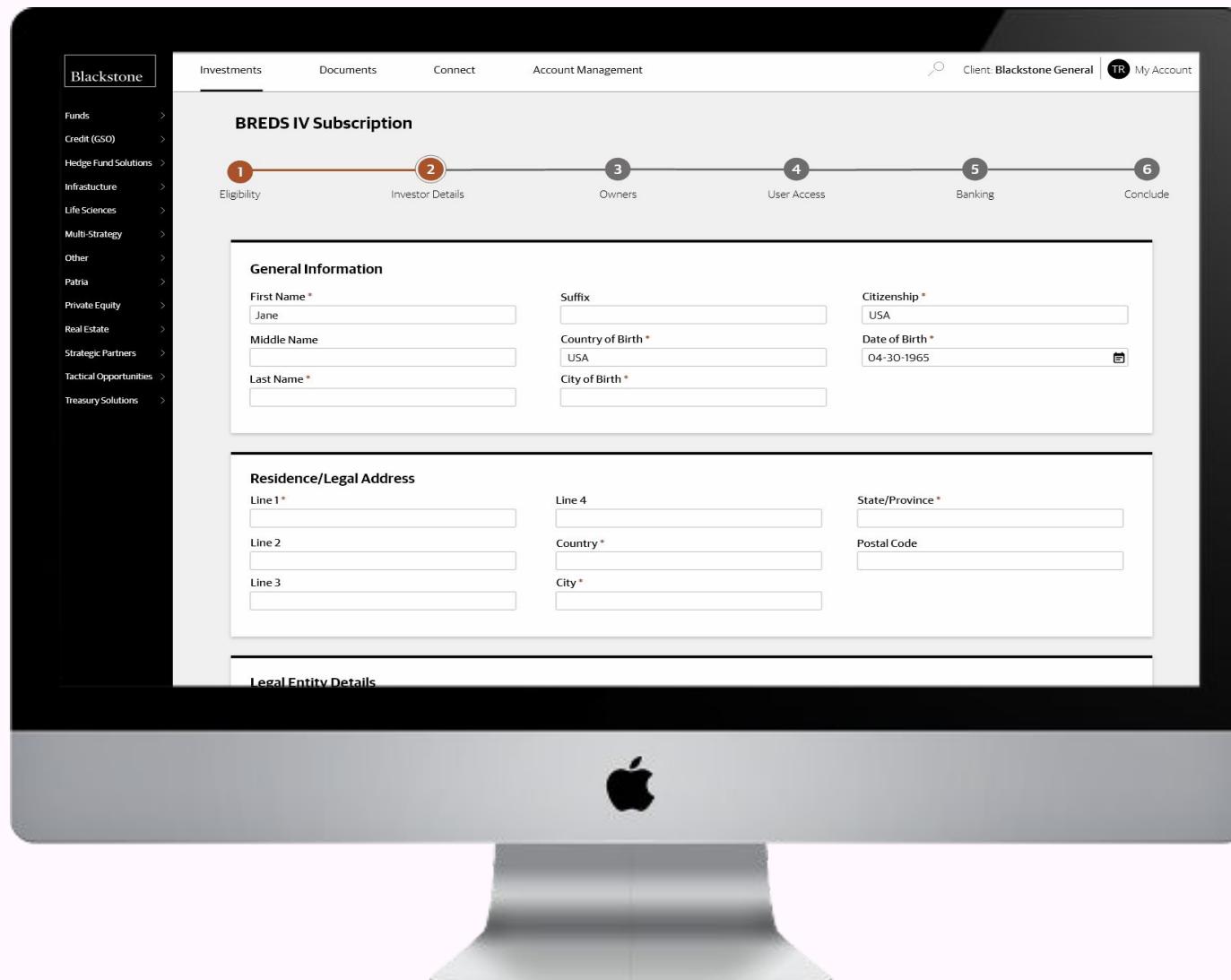
Please attach a sample signature for the authorized signatory.

Sample Signature * [Click here to upload](#)

Add Additional Jurisdictions of Residency for Tax Purposes

[Save](#) [Next](#)

final iteration: global components



original view: user access card

The screenshot shows the Blackstone User Access Card interface. At the top, there's a navigation bar with tabs: INVESTMENTS, DOCUMENTS, OPPORTUNITIES (which is selected), CONNECT, and ACCOUNT MGMT. To the right of the tabs are SEARCH, PROFILE, SHARE, PRINT, and SAVE buttons.

The main content area is titled "BREDS IV Subscription". Below it, a horizontal progress bar shows six steps: 1 Eligibility, 2 Investor Details, 3 Owners, 4 User Access (selected), 5 Banking, and 6 Complete and Sign.

The "USER ACCESS" section contains a note: "Please note that only the contacts listed below will receive correspondence regarding the Partnership." Below this is a table where users can assign roles to contacts. The columns represent different roles: ACCOUNT CONTACT, EDIT BANK ACCOUNTS, MARKETING, FUNDING, DISTRIBUTION, REPORTING, TAX, LEGAL, GENERAL CORRESPONDENCE, and ALL DOCUMENTS. The rows list contacts by First Name, Last Name, and Email. A green checkmark is visible in the "Edit Bank Accounts" column for the first contact.

FIRST	LAST	EMAIL	ACCOUNT CONTACT	EDIT BANK ACCOUNTS	MARKETING	FUNDING	DISTRIBUTION	REPORTING	TAX	LEGAL	GENERAL CORRESPONDENCE	ALL DOCUMENTS
Priya	Kankanhalli	priya.kankanhalli@blackstone.com	<input checked="" type="checkbox"/>									
				<input type="checkbox"/>								

[+ Add User](#)

ACCOUNT CONTACTS

Please provide us with additional information for the Account Contacts selected in the User Access grid. If you would like to add a new Account Contact, please do so from the User Access grid above. The Account Contact(s) will be the General Partner's primary persons of reference with respect to the Investor. For example, the General Partner will seek to contact the Account Contact(s) for matters related to the Investor's subscription, including, without limitation, any updates to the Investor's wire instructions, document access permissions, authorized signatories and other information relating to the Investor. The Investor is responsible for notifying the General Partner of any update to the Investor's Account Contacts.

FIRST NAME	Priya
LAST NAME	Kankanhalli
CONTACT	priya.kankanhalli@blackstone.com
MIDDLE NAME	
SUFFIX	
PHONE NUMBER	4108684914

[Add Account Contact Address](#)

BANK ACCOUNT UPDATES

Individuals permissioned to Bank Accounts are the only persons authorized to make changes to the permissions relating to the Investor's bank account information associated with its subscription to the Partnership. For organizations, at least two individuals are

initial iteration

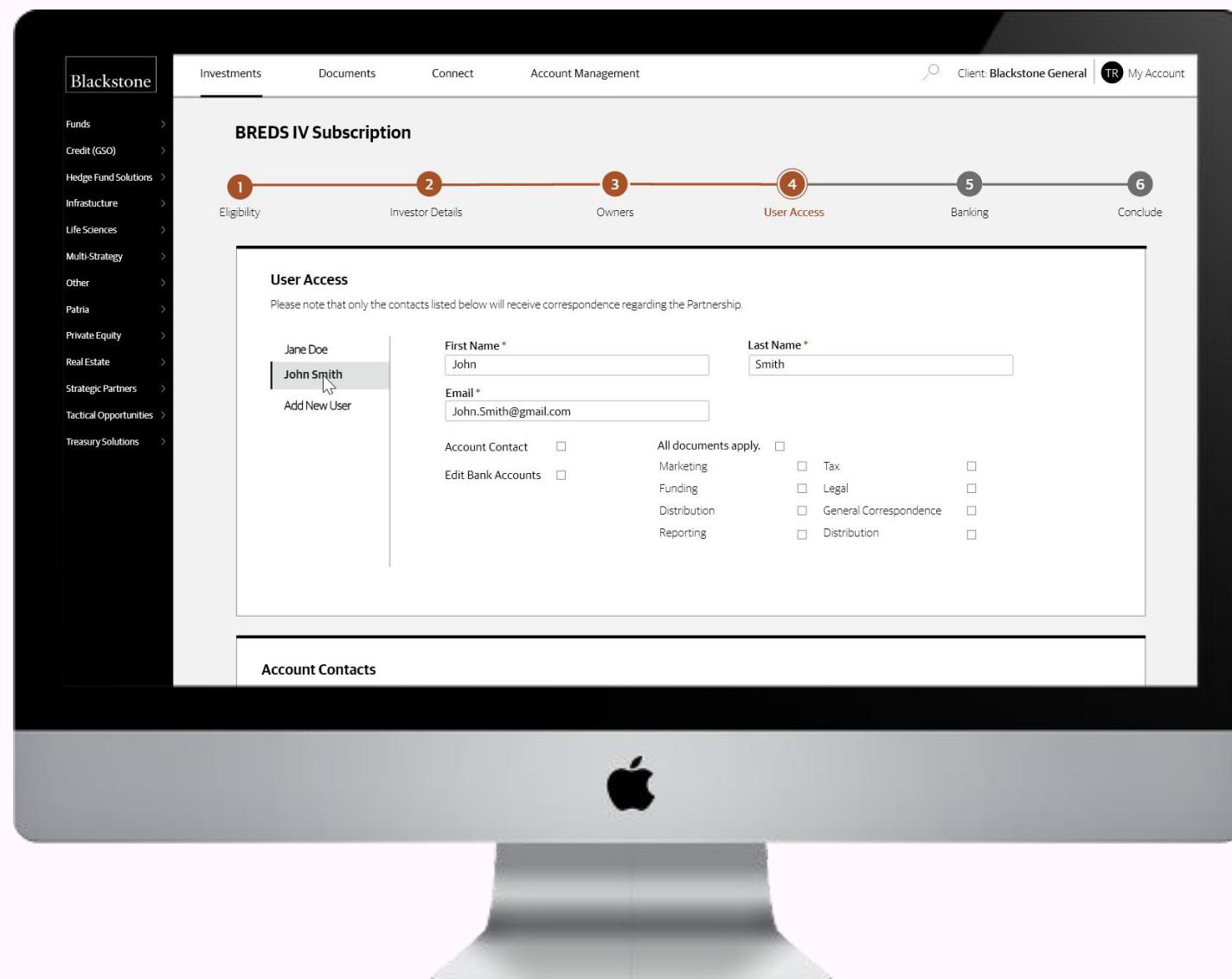
The screenshot shows the Blackstone BREDS IV Subscription process at the 'User Access' step (Step 4). The top navigation bar includes 'Investments', 'Documents', 'Connect', 'Account Management', a search icon, 'Client: Blackstone General', and 'My Account'. A sidebar on the left lists various funds: Funds, Credit (GSO), Hedge Fund Solutions, Infrastructure, Life Sciences, Multi-Strategy, Other, Patria, Private Equity, Real Estate, Strategic Partners, Tactical Opportunities, and Treasury Solutions.

The main content area displays a horizontal progress bar with six numbered steps: 1. Eligibility, 2. Investor Details, 3. Owners, 4. User Access (highlighted in orange), 5. Banking, and 6. Conclude. Below the progress bar, the 'USER ACCESS' section contains instructions: "Please note that only the contacts listed below will receive correspondence regarding the Partnership." It includes fields for 'First Name *' and 'Last Name *' (both required), and an 'Email *' field. Under 'Account Contact', there are two checked checkboxes: 'Account Contact' and 'Edit Bank Accounts'. To the right of these checkboxes is a list of permissions, all of which are checked:

- All documents apply.
- Marketing
- Funding
- Distribution
- Reporting
- Tax
- Legal
- General Correspondence
- Distribution

A blue 'Add User' button is located at the bottom left of the 'User Access' section. The 'ACCOUNT CONTACTS' section below it contains instructions: "Please provide us with additional information for the Account Contacts selected in the User Access grid. If you would like to add a new Account Contact, please do so from the User Access grid above. The Account Contact(s) will be the General Partner's primary persons of reference with respect to the Investor. For example, the General Partner will seek to contact the Account Contact(s) for matters related to the Investor's subscription, including, without limitation, any updates to the Investor's wire instructions, document access permissions, authorized signatories and other information relating to the Investor. The Investor is responsible for notifying the General Partner of any update to the Investor's Account Contacts." It includes 'First Name *' and 'Middle Name' input fields.

final iteration: user access card



original view: documents

Impersonating: Tammy Otten (South Dakota Investment Council, tammy.otten@state.sd.us) [View User Profile](#)

Blackstone INVESTMENTS DOCUMENTS OPPORTUNITIES CONNECT ACCOUNT MGMT SEARCH PROFILE

DOCUMENTS South Dakota Investment Council

Quick Search

Folders View

Documents

FOLDERS

Search documents...

All Investments Tax Prospect Action Required Favorites Unread

	DOCUMENT NAME	PERIOD	PUBLISHED	DOCUMENT TYPE	
▶ <input type="checkbox"/>	Tax Advice - Durian (Chengdu) - BREP IX.p...	2020	Jul-02-2020	Legal Opinions	
▶ <input type="checkbox"/>	Limited Liability Opinion - Durian (Cheng...	2020	Jul-02-2020	Legal Opinions	
▶ <input type="checkbox"/>	Limited Liability Opinion - Durian (Cheng...	2020	Jul-02-2020	Legal Opinions	
▶ <input type="checkbox"/>	Amendment No 2 to BREP VII LPA (Execut...	2020-Q3	Jul-02-2020	Limited Partnership Agreements	
▶ <input type="checkbox"/>	Blackstone Capital Partners (CYM) VI DPP-...	2020-Q2	Jul-01-2020	Legal Opinions	
▶ <input type="checkbox"/>	Blackstone Capital Partners (DE) VI DPP-O...	2020-Q2	Jul-01-2020	Limited Partnership Agreements	
▶ <input type="checkbox"/>	Blackstone Capital Partners (CYM) VI DPP-...	2020-Q2	Jul-01-2020	Limited Partnership Agreements	
▶ <input type="checkbox"/>	2019 AIFMD Article 23 Report - BREP VIII....	2020	Jul-01-2020	AIFMD Disclosure	
▶ <input type="checkbox"/>	2019 AIFMD Article 23 Report - BREP Euro...	2020	Jul-01-2020	AIFMD Disclosure	
▶ <input type="checkbox"/>	BEP II - 2019 AIFMD Annual Report - Artic...	2020	Jun-30-2020	AIFMD Disclosure	
▶ <input type="checkbox"/>	BCP VII - 2019 AIFMD Annual Report - Art....	2020	Jun-30-2020	AIFMD Disclosure	
▶ <input type="checkbox"/>	06-30-2020 BEP II Net Drawdown South D...	2020-Q2	Jun-30-2020	Capital Call Notices	
▶ <input type="checkbox"/>	SP RE VII - Ninth PPM Supplement.pdf	2020-Q2	Jun-26-2020	Private Placement Memorandum	
▶ <input type="checkbox"/>	SP Form ADV Part 2B - March 2020.pdf	2020-Q2	Jun-26-2020	ADV Brochures	
▶ <input type="checkbox"/>	SP Form ADV Part 2A Brochure March 20...	2020-Q2	Jun-26-2020	ADV Brochures	

initial iteration

[Blackstone](#)

[Investments](#)

[Documents](#)

[Opportunities](#)

[Connect](#)

[Account Management](#)

Client: **Blackstone General**

South Dakota Investments Council

Documents | Folder View [▼](#)

Folders

New Project
□ BCP IV
> □ Distributions
> □ Cash Distribution
2003 - Q2
2004 - Q1
2004 - Q4
2005 - Q1
> □ Funding
> Capital Call Notices
2003 - Q2
> □ Management Fee Notices
> □ General Correspondence
> □ Legal
> □ Marketing Materials
> □ Reporting
> □ Tax
□ BCP V
□ BCP V - CO
□ BCP VI

All	Investments	Tax	Prospects	Action Required	Favorites	Unread
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020
12967_Doc1.pdf	Report	June-28-2020	June-28-2020	June-28-2020	June-28-2020	June-28-2020

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final iteration: card designs

The image shows two devices displaying the Blackstone document management system. On the left is a desktop monitor showing the 'Documents' view. The top navigation bar includes 'Investments', 'Documents' (which is the active tab), 'Connect', and 'Account Management'. The search bar shows 'Client: Blackstone General' and 'My Account'. The main content area has tabs for 'Folder View' and 'List View'. A sidebar on the left lists document categories: '>BCP IV', '>BCP V', '>BCP V - CO', '>BCP VI', '>BCP VII', and '>BCP VIII'. The main content area features a 'Recently Accessed' section with a table:

Document Name	Document Type	Period	Published
> <input type="checkbox"/> Amendment No 2 to BREP VII	Report	2020-Q3	July-30-2020
> <input type="checkbox"/> 1297.Doc1.pdf	AIFMD Disclosure	2020	July-23-2020
> <input type="checkbox"/> SP RE VII - Ninth PP.pdf	Capital Call Notices	2020	June-30-2020
> <input type="checkbox"/> Document_1567.pdf	ADV Brochures	2020	July-25-2020

Below this is an 'All Documents' section with a table:

Document Name	Document Type	Period	Published
> <input type="checkbox"/> Investor Notice - BX Energy	Report	2020	June-28-2020
> <input type="checkbox"/> 2019 AIFMD Article 23	AIFMD Disclosure	2020	June-28-2020
> <input type="checkbox"/> 06-30-2020 BEP II Net Drawdown	Capital Call Notices	2020	June-28-2020

On the right is a smartphone displaying a simplified mobile interface. The top bar includes the 'Blackstone' logo, a search icon, and a menu icon. Below this is a search bar with placeholder text 'Search documents....' and a search button. The main content area shows a table with a single row:

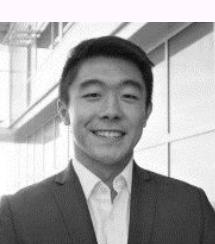
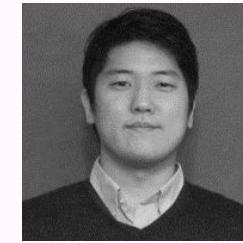
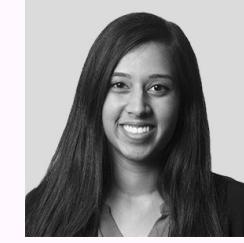
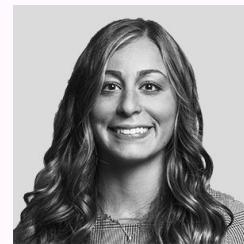
Document Name
[+ Accounts without Recipient...]

Below this are download links for 'Admin Recipient List' and 'All Permissioned Users (PSV)'. At the bottom, there is a summary box with the following details:

Document Name: 928349328740209508324
Investment Vehicle: Sd KDSFJH HDHF
Partnership: BrEPOJODSIFo
Partnership EIN: oashonj
Effective Date: Mar 24 2020

Download links are provided for 'Authorized Signatories (PSV)' and 'Document Recipient FedEx...'.

thank you to all our interviewees!



impact



- eliminating redundancy by standardizing features
- saving time for front-end developers
- pushing BX to the forefront of innovative and modern design
- supporting the BX design ethos
- reducing time LPs spend on IDX applications

d&i project

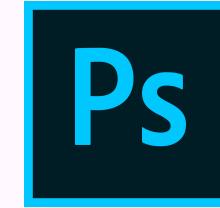
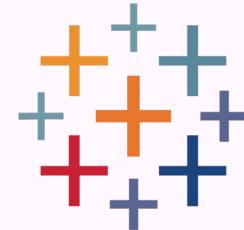
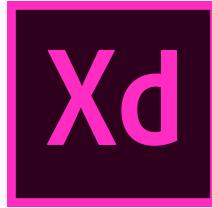


summer analyst class “chummings”

- interns are randomly paired for a weekly, themed coffee chat
- 85% engagement from entire SA class



what i learned



- public speaking
- project management
- navigating professional settings
- becoming a morning person

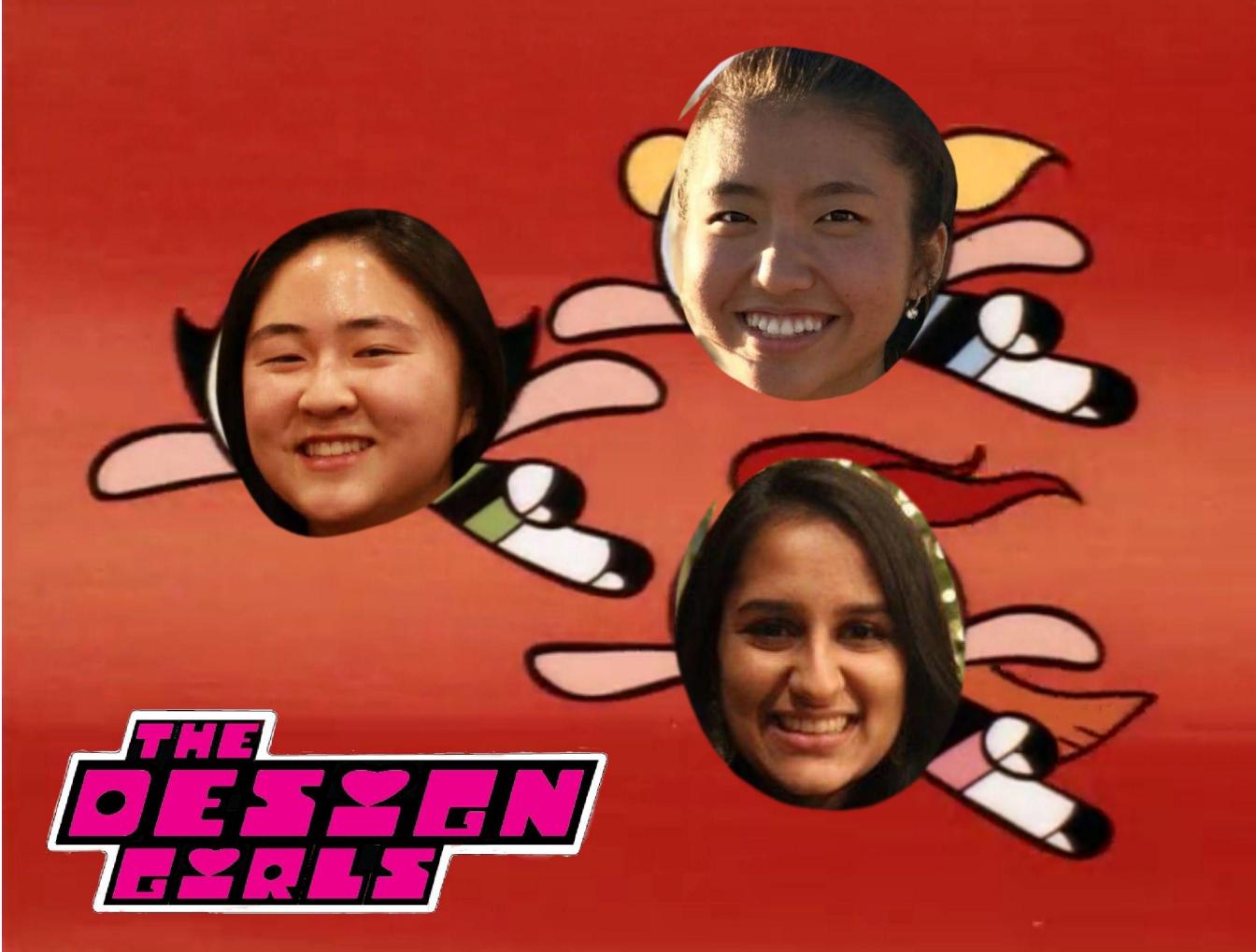
thank you for everything!!



overview | strategy & execution | impact | projects | **concluding remarks**

“wait hold on im on a call with help desk”

-elly



“im so hungry”

-elly

“lunch break?”

-lily

“LUNCH”

-divya

“i must laugh”

-lily

“guys my poker face is so good”

-divya

“my back hurts”

-elly

“i need to restart my computer”

– the design team interns

“my vpn just disconnected”
– all of us, at some point



“someone send the zoom link”
– heard at least once a day