

# Collateral On Demand

UX CASE STUDY



BY  
*Keren Goldman*

# Collateral Building Reimagined

*Collateral on Demand gives KPMG the power and agility to respond quickly and get to clients faster.*

Collateral on Demand is an award winning interactive web-based tool I designed that allows users to create KPMG-branded, client-facing meeting documents quickly and without any design skills. The simple, logical and easy to use UI are not typical of a large scale project and resulted in critical savings of time and effort for our users. The firm-wide sales enablement tool allows users to customize documents for their clients through the use of content filters to populate firm-approved content. Collateral is designed to be tailored to an opportunity and help ensure that external client meetings are meaningful and productive.

## The Problem:

KPMG discovered that too many resources were being allocated to build print ready marketing collateral to sell our services. The firm had no automation process for the creation of collateral resulting in a manual effort that took days to create a simple document. On average, three resources were being allocated for at least 3 days to produce materials. This gives competitors the opportunity to dominate the market, even with a substandard product—simply because they got there first. It was critical to provide KPMG with a way to speed up turnaround time while cutting support costs.

## The Result:

### *Time Savings:*

- Users can now **create collateral EIGHT TIMES faster** without skilled design resources, content editors or SME's. Production time dropped from an average of 3 days to 3 hours.

### *Improved speed to market:*

- Increased speed to market gives KPMG the advantage over competitors when it comes to innovation; allowing them to reach consumers with new products, services and offers faster.

### *Efficiency savings through automation:*

- Without training, admins are able to intuitively use Collateral On Demand to create KPMG-Branded, client-facing meeting documents with relevant and current content for the professionals they support.

### *Reduction of cost:*

- The tool's self-service model resulted in greater cost savings through reduced support costs, lesser training requirements and higher user productivity.



## The Approach

### Focusing on features Goals

Although the original direction was to prioritize the development of innovative functionality, we stressed that engaging in a feature war was neither strategic, nor had the best interests of the tool's users at heart. To create something truly meaningful, we needed to define a desirable role for the tool and how it would meet the needs of our users first. We were excited by the opportunity to create something more meaningful.

### A collaborative culture driven by lean UX

We opted for a lean approach which emphasized rapid sketching, design mockups, prototyping and user feedback. This created early team-wide alignment, sparked tons of great ideas and created a strong sense of ownership across different stakeholders within my organization. Rather than focusing on requirements we focused on a problem statement that led us to creating the hypothesis statement.



## Hypothesis Statement

*We believe that the KPMG salesforce and their admins need an automated tool to quickly create client-facing materials with relevant content for sales presentations without any technical or design skills.*

*We will know we have succeeded when users can create same day KPMG-branded collateral, which will increase speed to market and reduce support costs.*

### Building trust through transparency

Sharing our methods and thinking from the outset helped to build strong stakeholder relationships. Ample opportunities for input at all stages of the project built trust and created a comfortable environment to share ideas—forming a partnerships which served much value beyond this phase.

### Starting on the same page

Meeting with key stakeholders and users helped us to understand their business challenges. Together we identified risks and aligned on expectations to construct a shared vision for the tool. Following this, I crafted a design strategy outlining our approach and direction for the tool.

# The Discovery

The discovery phase was a quick, high-intensity effort that allowed us to define project milestones, audit the existing collateral and external tools, review the current workflow, understand our stakeholder's visions, and begin research into user needs and pain-points. We also kicked off a technical discovery phase to understand feasibility and constraints. Our key priority for the early phases was to focus on primary user goals. Our first task—stripping the tool to its core and focus on usability and convenience.

## Innovation starts when you ask simple questions

- How can we templatize a manual effort for automation?
- How could engaging with external data sources be easier?

## Key Findings

After countless hours reviewing a myriad of marketing materials we discovered that each document type more or less followed the same layout. Since they were not tailored or unique, we identified the commonalities so that they could be templated for automation. We determined that we needed to turn complex data into interactive visualizations to be easily understood. The tool's success hinged on the presentation of complex information via clear design.

# Understanding the Problem

## Designing for what users want to know, do & feel

Synthesizing goals served as a lens through which we could consider not only what the tool should do, but also how it should feel. I believed this would be the difference between delivering a good experience and an exceptional one. This approach helped our team understand the importance of clean aesthetics and tone of voice to the experience.

**Anna Admin**

**1 / Responsibilities**  
Anna provides back office support directly to firm leadership. Her partner is on the go, primarily concerned on closing the deal and relies heavily on her for quick delivery.

**2 / Motivations**  
Wants to know what options are available to improve daily workflow & advance career.

**3 / Mindset**  
CAREER PROGRESSION: Moderate Growth  
DISCOVERY: Asker  
PERCEPTION OF TOOLS: Difficult to use

**Anna's Frustrations**

- KPMG tools are too hard to use.
- I am not technical.
- I am busy multitasking.
- I can't easily find the content I need.

**Anna's Goals**

- I want to improve my workflow
- I want to be more effective at my job
- I want to quickly create collateral without help from skilled resources
- I want easy access to relevant content

*Anna's goals are to improve her workflow and save time creating marketing collateral with relevant content in an easy and efficient way.*

*Anna wants to feel 'in-control' using this tool.*

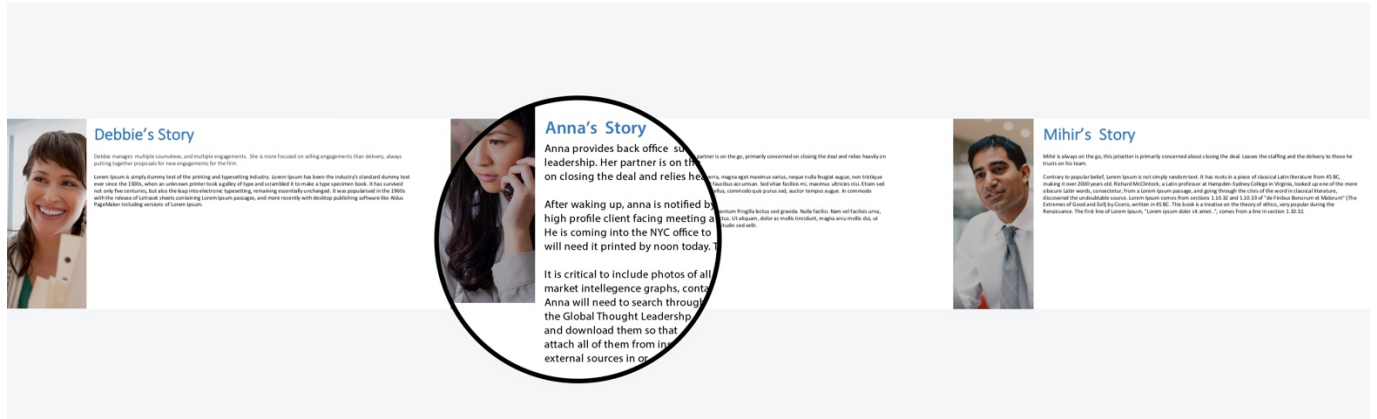
SAVE TIME BE EFFICIENT BE CONFIDENT FIND INFO QUICKLY

MOTIVATIONAL DESIGN THEMES



# Storytelling for Ideal Experiences

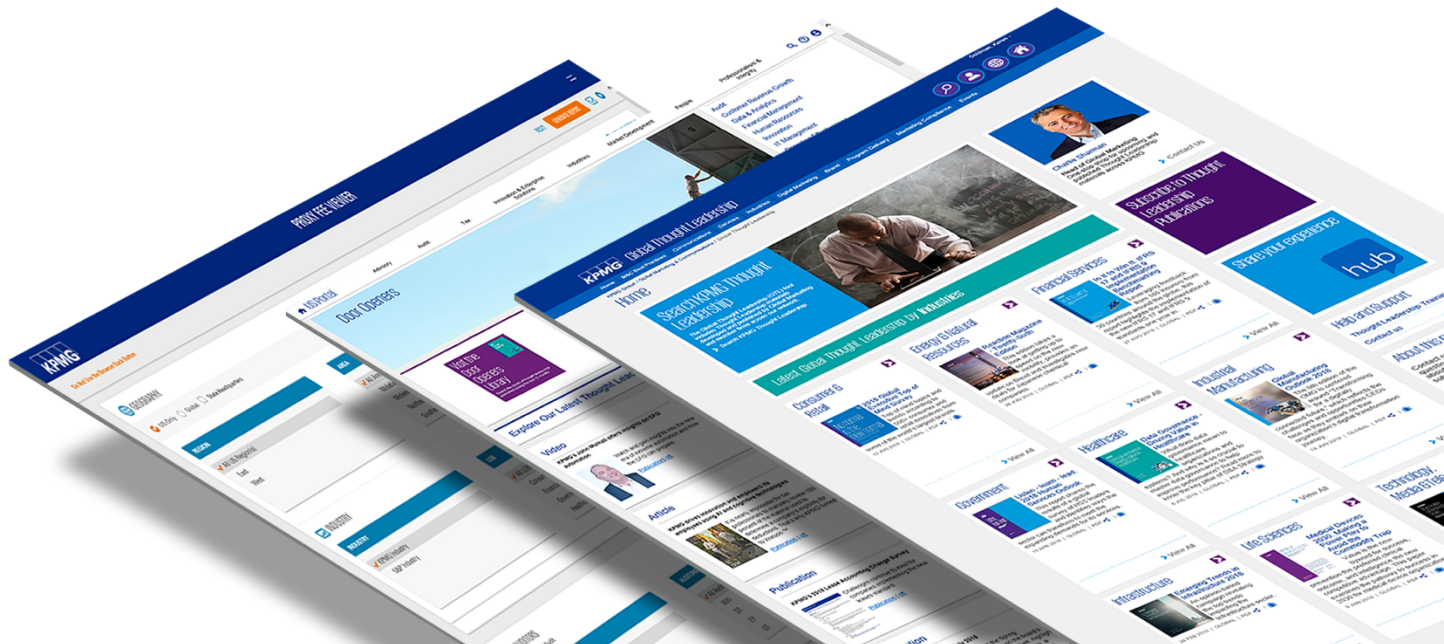
Knowing the users I was designing for allowed me to ask myself how the tool fits into the lives of the users. I imagined ideal experiences and focused on how our users think and behave rather than getting into specifics about interfaces or technologies. Keeping the scenarios at a high-level allowed us to work fluidly and explore concepts that we could easily communicate. They allowed us to express these from both a functional and emotional perspective allowing for further empathy with our users.



## The Framework

### Structuring Data First

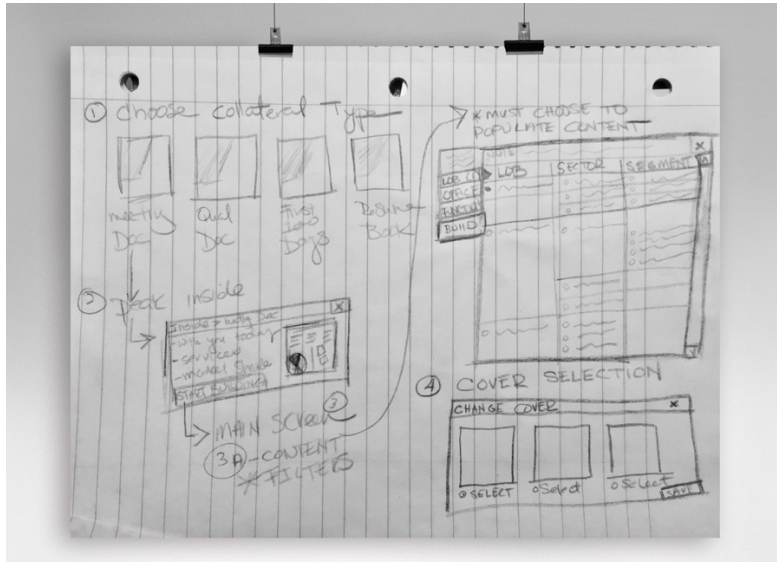
Before starting design, we spent a great deal of time making sense of workflows and existing data points. This involved a ton of task analysis. We needed to consider existing systems and how to integrate critical tools such as KPMG's Global Thought Leadership Directory. We also carefully analyzed external applications such as the firm's Market Intelligence Tool in order to design an intuitive approach to display essential data points from external sources.



# Setting the Design Direction

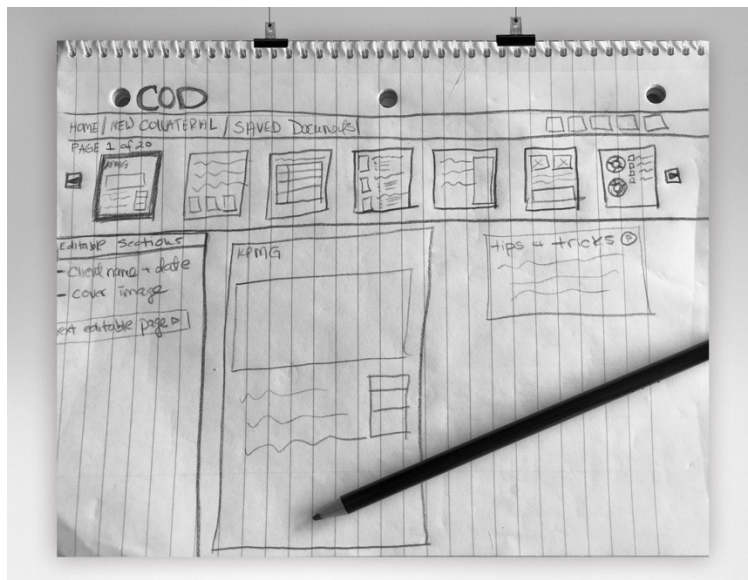
## Visual Thinking on Paper

In order to help understand many of the complex processes involved in the collateral building journey, I mapped workflows on paper. Doing so helped me to understand the particular points where our tool could help minimize workflow complexity as well as highlight opportunities where we could really try to innovate.



## Sketching Interfaces

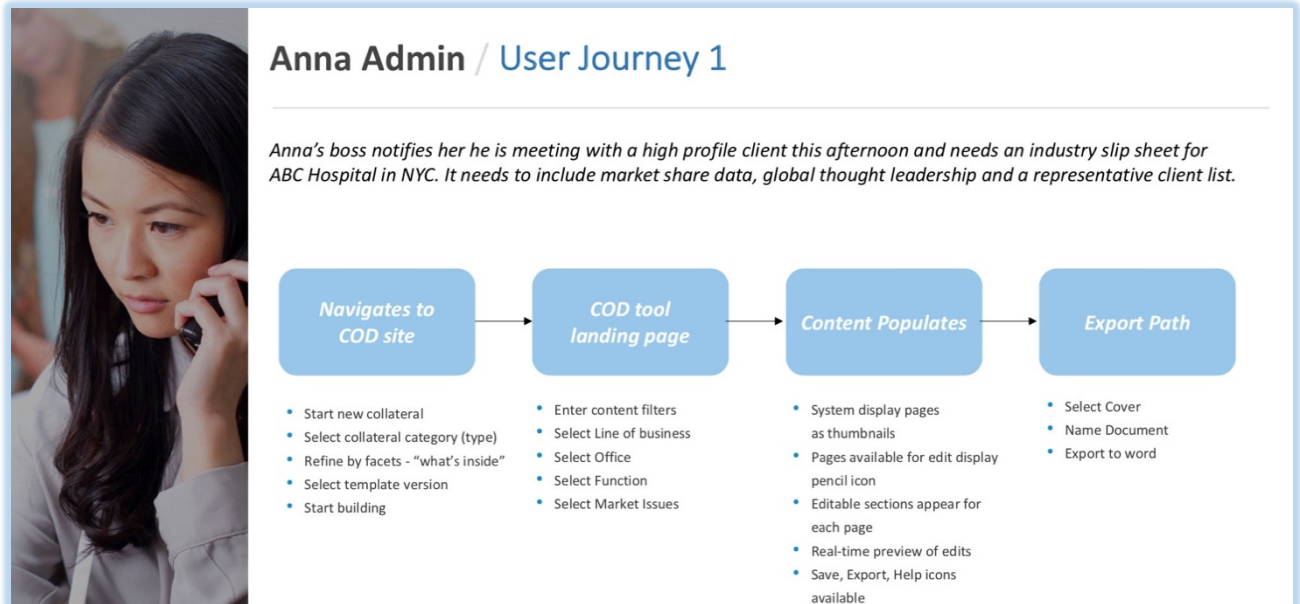
We took a top-down approach to defining the overall structure of the experience. Sketching and white boarding, I generated stacks of ideas about the arrangement of UI, functional and data elements, and interactive behaviors. Starting broad, our vision began evolving into something tangible. A high-level design language, interactions and the tool's structure began to come together.



*Early sketches exploring patterns for the tool's visual carousel navigation. Because of time pressure, I worked rapidly often jumping straight from sketches to hi-fidelity mockups.*

## Structuring the experience

I defined the primary pathways our users would explore through the tool. Crafting the key user journeys, was the best way to conceptualize and structure the data, functionality and navigation. I began to think about particular usage contexts, the opportunities they present and how elements manifesting themselves in the interface would help to support the user. I storyboarded my ideas to help design and communicate more complex interactions and flows. This was a huge time-saver and allowed me to avoid excessive prototyping.



## Solution Themes

To communicate the aim of our tool to our stakeholders and team, I developed a set of solution themes. These were used to describe key aspects, validate design decisions and drive the UX direction of the tool.

### Removing barriers to entry

We simplified steps for users, making it easier for them to get started. Users can choose a template by category such as meeting documents, market issues and case studies. They can also automatically narrow their template choices by refining topics from “what’s inside”.





# Make important things fast

When the user starts building a document, the entry screen is designed to guide quick selection of mandatory content filters. This automatically populates the collateral's pages with appropriate content such as line of business, office location, function etc. The tool's landing page was designed to allow users quick access to editable pages and primary functions of the tool.





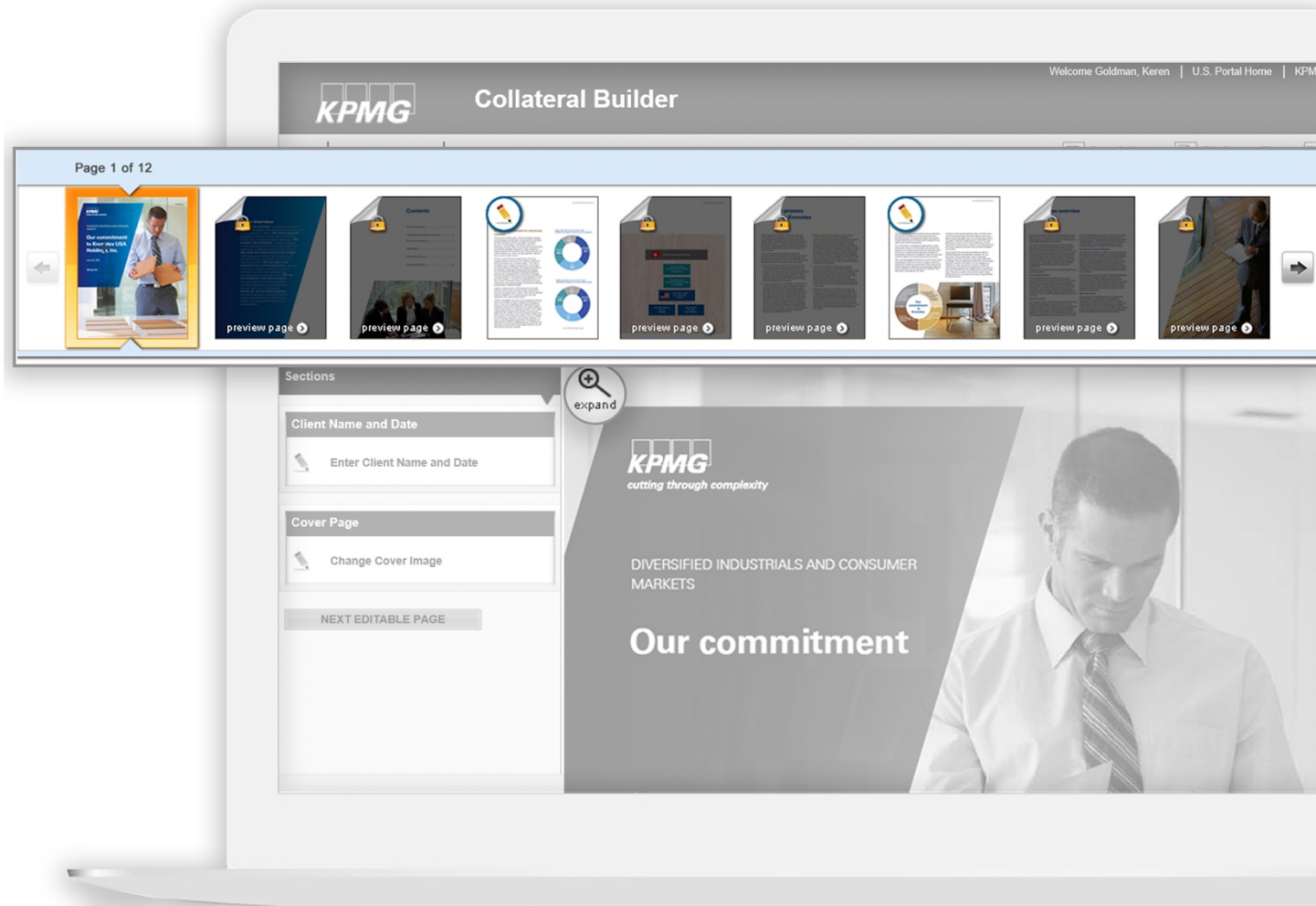
## Real-time visual platform

The WYSIWYG editor allows for real-time previews of text and graphics so that users can see the exact appearance of collateral while they are editing content. The preview can be expanded enabling users to see on screen exactly what will appear when the document is printed.



## Pictures are worth a thousand words

The thumbnail slider gives users a visual way to quickly navigate through document pages. User feedback showed early on that the visual navigation would be most effective, not only because it let users know how many pages the document has, but it also allows users to easily navigate directly to the page they want to edit or preview.



## Error prevention

An interface is most vulnerable to user abandonment when something goes wrong. Rather than throwing an error, I altered the UI where possible to prevent the user from making mistakes. When mistakes threatened task completion, I provided users with clean and clear information.



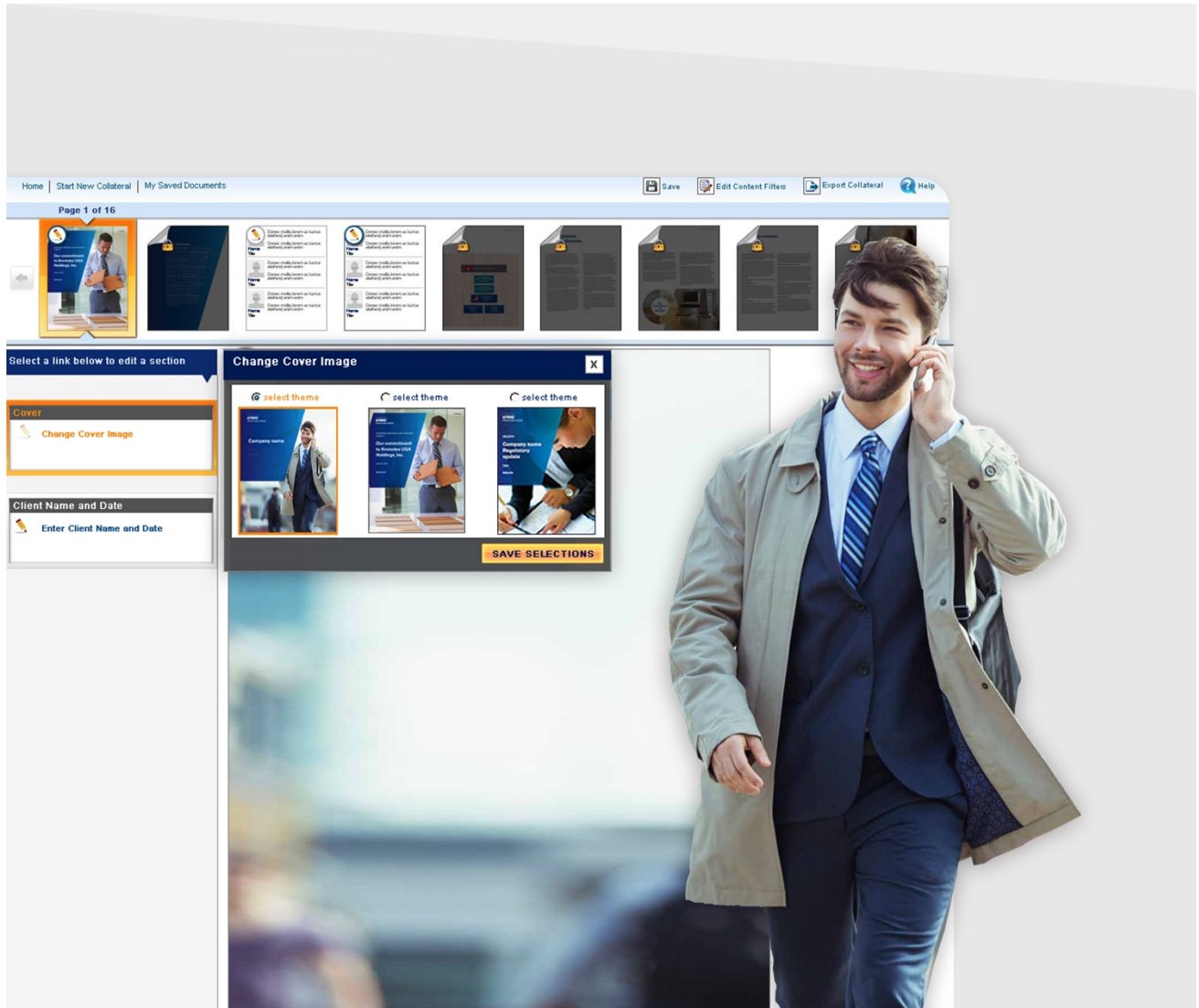
## Contextual Help

I provided guided assistance through tooltips, ghosted text, rollover info, iconography, and a help section.



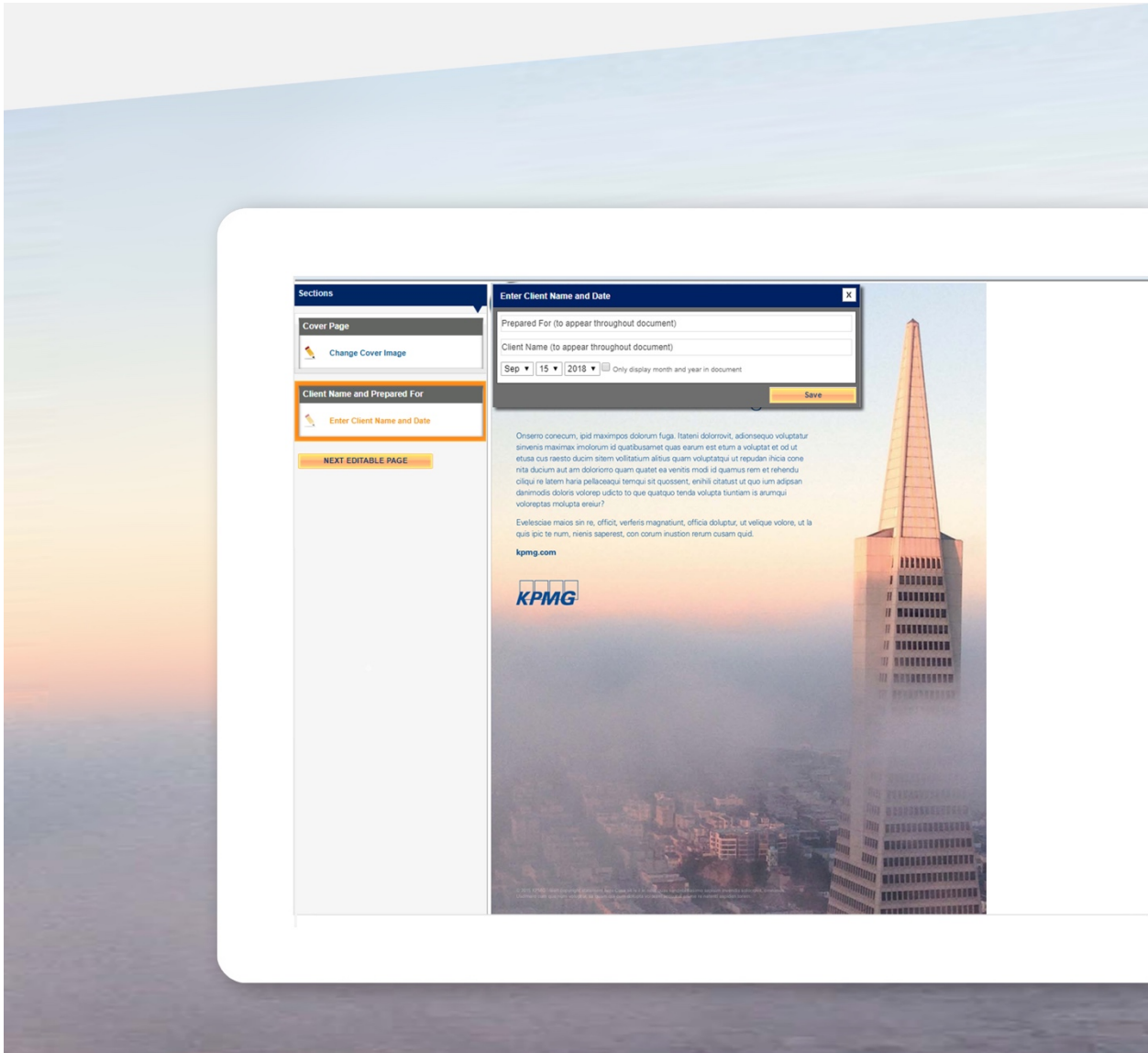
## Minimize learning

Primarily designed to support client-facing employees prepare for meetings in a hurry, users can depend on a simple and visually guided experience to help them learn to use the tool.



# Designed for Confidence

The interface design strives to be confident. It does not contain UI-bling or unnecessary elements. I opted for clear, readable typography — choosing colors with high contrast to increase legibility. The design is uncluttered, clean, large and well-spaced. All the design decisions helped to exude a sense of confidence in the tool.

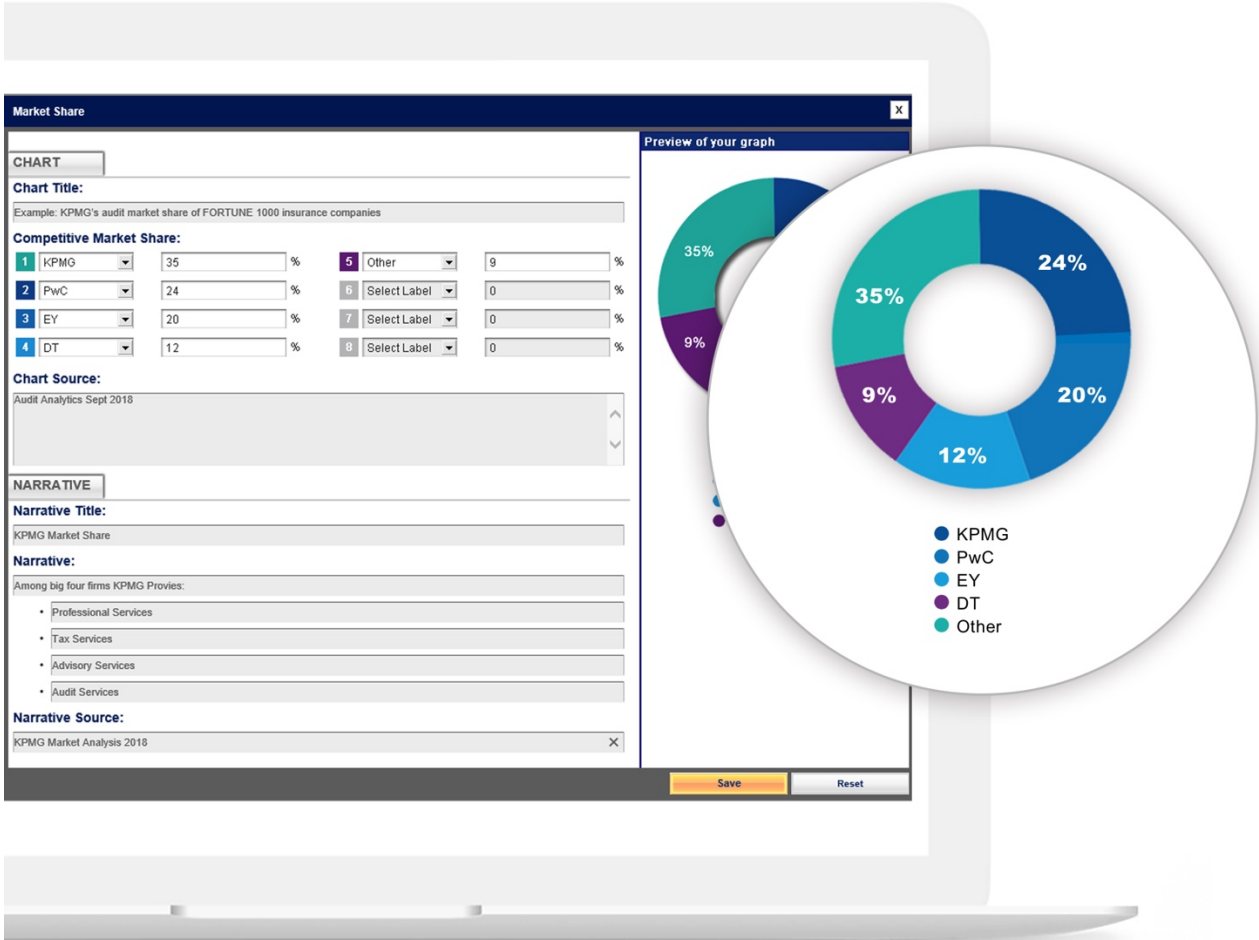




# Making Data Work

## Raw data into intuitive visualizations

We worked with external systems to turn complex data into interactive visualizations to be understood at a glance.



Interactive chart fills in data for live preview.

## Clear Options

The tool's success hinged on the presentation of complex information via clear design. A visually represented set of complicated options becomes much easier to comprehend and navigate.

The screenshot displays a web application interface for document management. At the top, a navigation bar includes links for Home, Start New Collateral, and My Saved Documents, along with icons for Save, Edit Content Filters, Export Collateral, and Help. Below this is a horizontal carousel of document thumbnails, with one document titled 'Thought Leadership' highlighted in orange.

The main interface is divided into several sections:

- Keyword(s):** A search input field with a magnifying glass icon.
- Refined Results:** A section with a 'Reset Filters' button.
- LOB / Sector / Segment:** A list of categories with checkboxes:
  - Consumer Markets
  - Financial Services
  - Government & Public Sector
  - Healthcare & Life Sciences
  - Industrial Markets
  - Technology, Media, and Telecom

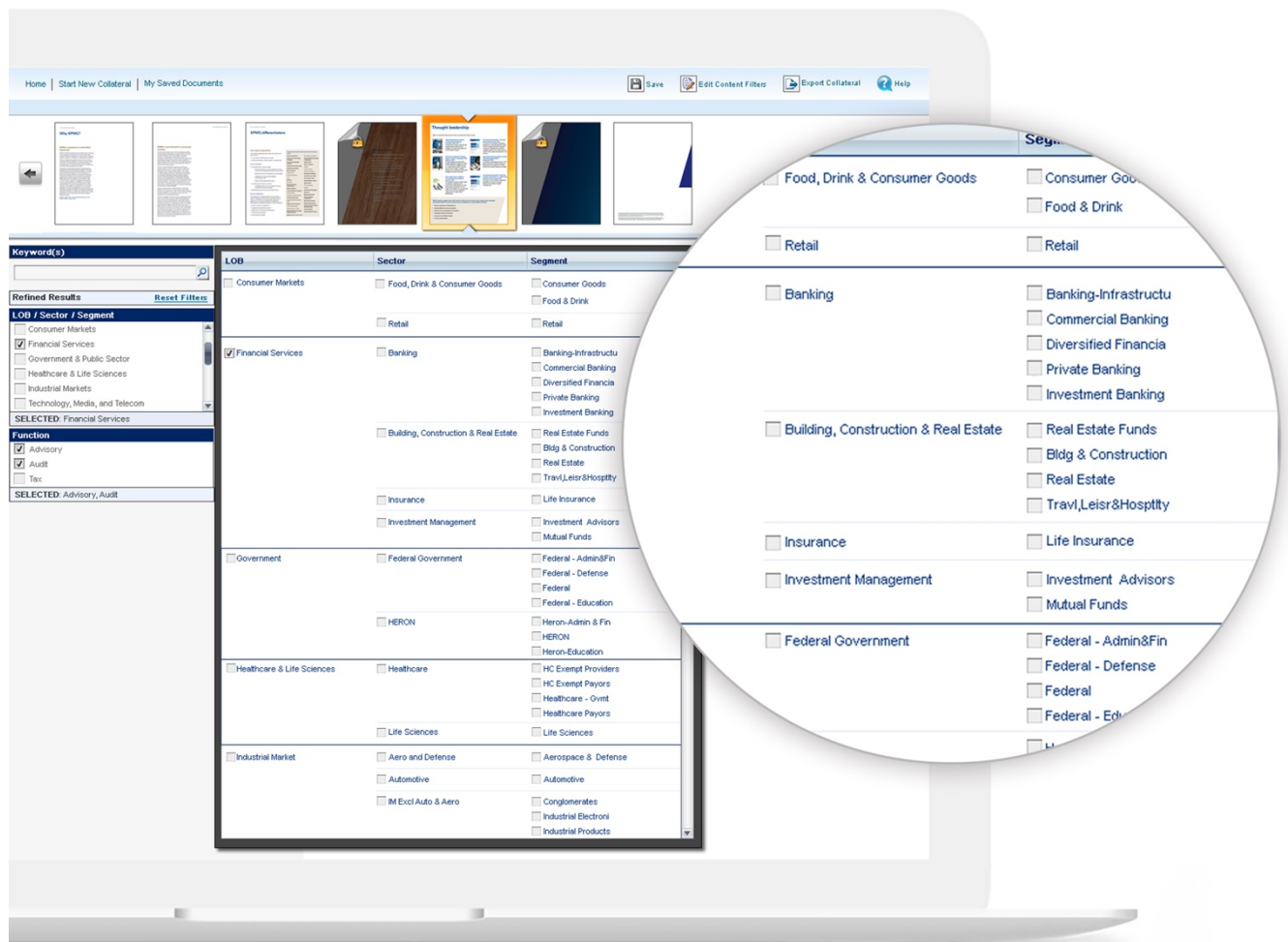
SELECTED: Financial Services
- Function:** A list of functions with checkboxes:
  - Advisory
  - Audit
  - Tax

SELECTED: Advisory, Audit
- Select Thought Leadership:** A central list of results showing document thumbnails, titles, dates, and categories. The first three items are selected with checkmarks:
  - Discover The Value in Your Fixed Asset Register** (08 April 2018, Advisory, Audit | Financial Services, Banking & Capital Markets, Commercial Banking)
  - Tweeting from the Top** (08 December 2011, Advisory, Audit | Financial Services, Banking & Capital Markets, Commercial Banking)
  - Bringing the Future Forward** (08 December 2011, Advisory, Audit | Financial Services, Banking & Capital Markets, Commercial Banking)
- You have selected:** A summary of the three selected documents, showing their thumbnails, titles, and dates.

At the bottom right, there are two buttons: 'SAVE SELECTIONS' and 'Reset All Selections'. A note at the top right states: 'Please note: Maximum of X can be added to document.' with a question mark and 'X' icon.

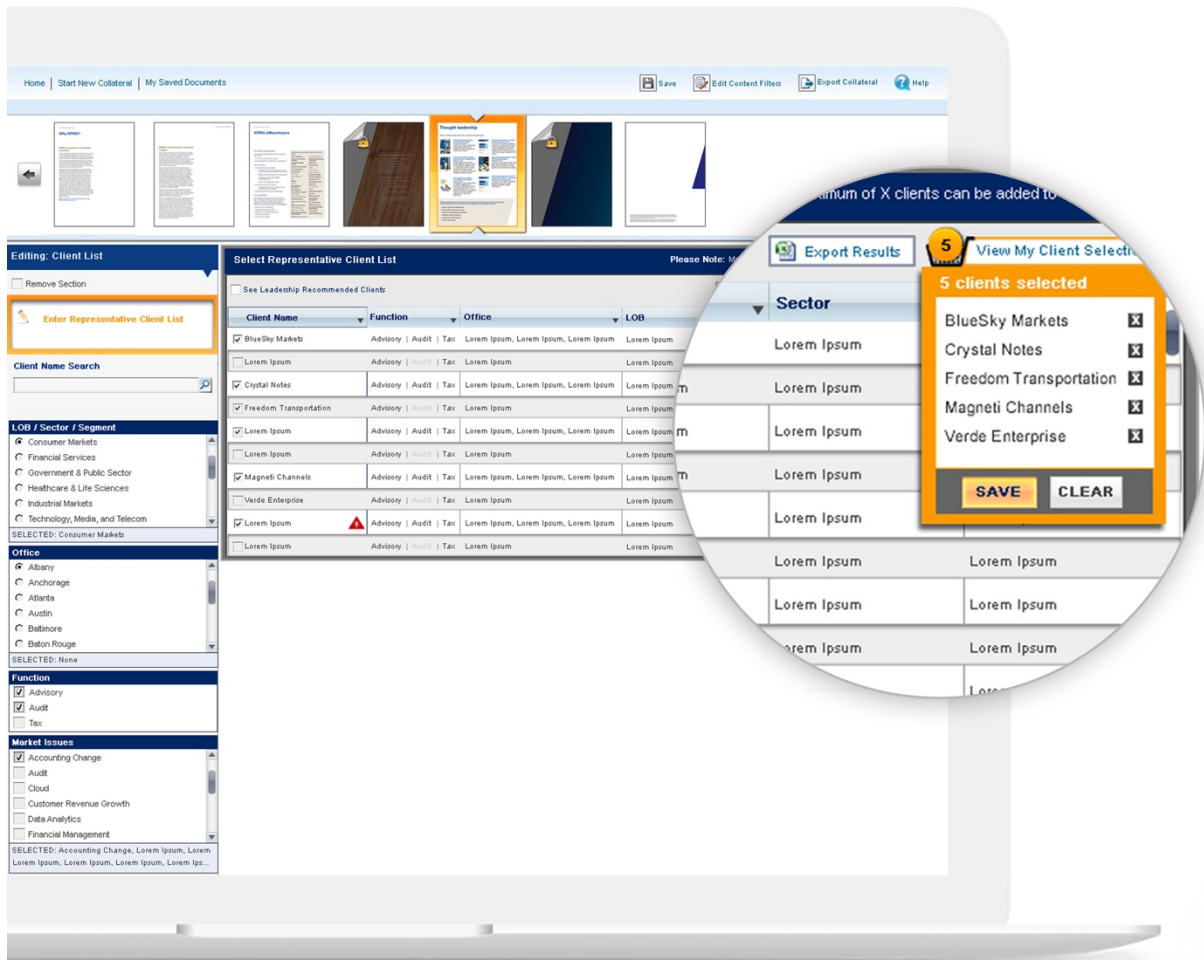
## Intuitive Filters

Users can easily filter results by various criteria with visual feedback.



## Choose, review and edit

Each section has a “cart” that lets users easily choose, review and edit their selections all on the same screen.



# Recognition







# Build something inspiring

HIRE ME: [KERENGOLD@GMAIL.COM](mailto:KERENGOLD@GMAIL.COM)