

Options Analysis & Research platform

Leading the design of a new options trading platform

- ✓ Research
- ✓ Product design
- ✓ Usability testing
- ◆ Figma
- ◆ HTML/CSS
- ◆ Jira

Option Trade Builder tool for novice traders

Lowering the barrier of entry for new customers

- ✓ Product design
- ✓ UI design
- ◆ Figma
- ◆ HTML/CSS
- ◆ Jira

Multi-leg options trading experience for Wealhscape

Envisioning a new experience to catch up to our competitors

- ✓ Research
- ✓ Product design
- ✓ Prototyping
- ◆ Sketch
- ◆ Axure
- ◆ Confluence



Enterprise design system support

Taking our design system to the next level

- ✓ Design systems
- ✓ UI design
- ✓ Auditing
- ◆ Figma
- ◆ Loop



Visual design for CAD software and kids creativity apps

Designing for the engineers of today and tomorrow

- ✓ Visual design
- ✓ Illustration
- ✓ Automation
- ◆ Photoshop
- ◆ Illustrator

My portfolio is a testament that design is a team sport, and launching a successful product not only requires good UX but also **trust, collaboration, a lean** approach, and taking an **honest-to-God look** at things, especially when times get tough. My aim on the job is to improve not just UX, but TX (team experience), too!

Chris Daley

Experience Design Portfolio

Leading the design of a new options trading platform

Organization & Role

I served as a Senior UX Designer for the individual investor business at Fidelity Investments, a global financial technology & services and brokerage firm.

Situation & Tasks

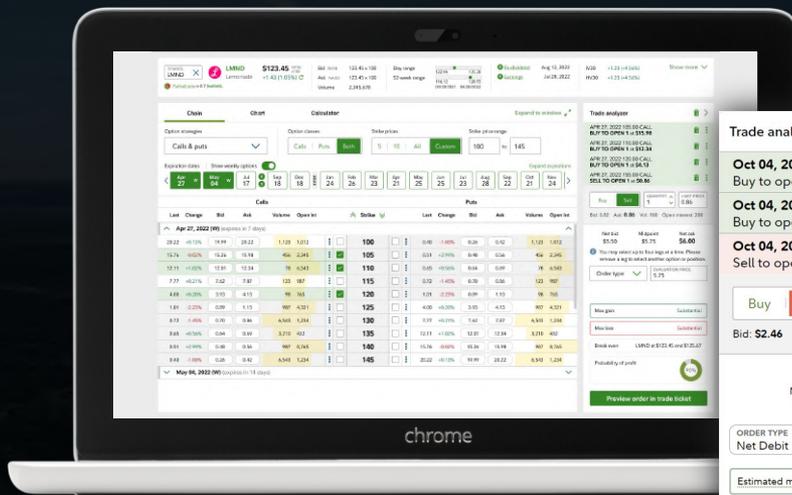
Fidelity's aging trading platform had begun to lag behind the trend of younger, novice investors seeking intuitive and accessible options trading offerings provided by competitors. We needed to **modernize**.

Action

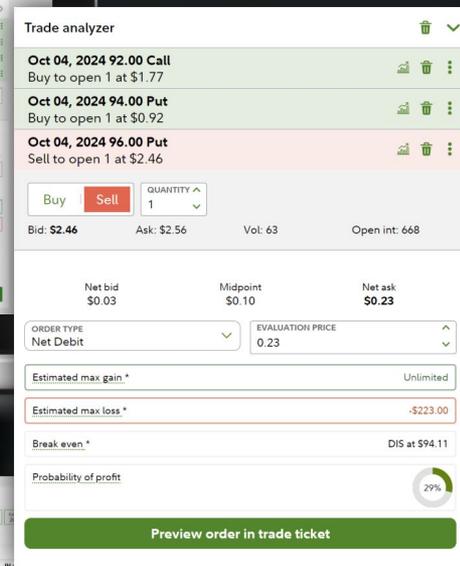
We created a modernized option chain with enhanced functionality and a new *Trade Analyzer* tool that allows users to analyze trades much more **quickly and effectively** before execution.

Result

In 2024, the new *Options Analysis & Research* platform contributed to **+16% revenue**, **+8% net asset flow**, and **+34% daily average trades** (year-over-year) for the firm.



Sample of the option chain dashboard design (with stock quote bar and *Trade Analyzer*), built in Figma.



Live version of the *Trade Analyzer* (as of October 2024).



5: Deselecting an expiration keeps the other expiration in place—note that the inline message returns



6: In this example, if the user selects "Near" when Near and Far would be out of order, then the "Far" expiration would be deselected (also, not shown: if the user selected "Far", then it would simply replace the "Far" expiration)

Interaction design wireframes for creating a calendar spread, which requires selecting two expiration dates.

Chris Daley

Experience Design Portfolio

Lowering the barrier of entry for new customers

Organization & Role

I served as a Senior UX Designer for the individual investor business at Fidelity Investments, a global financial technology & services and brokerage firm.

Situation & Tasks

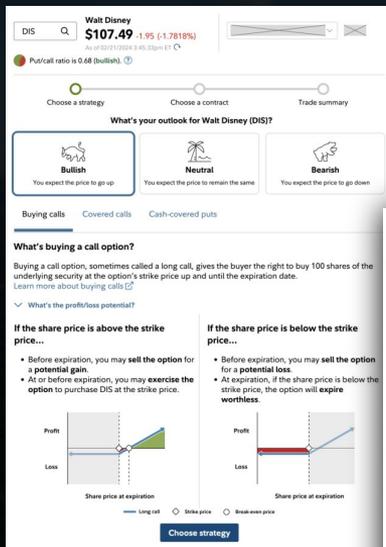
With an influx of new options-enabled accounts over the last 5 years, we needed to **lower the barrier of entry** to the complex world of options trading.

Action

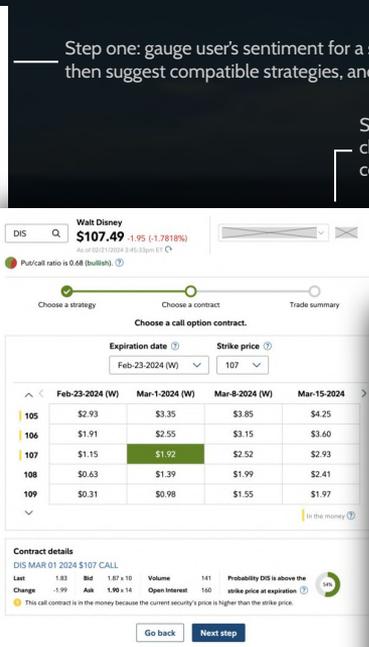
We built a **live proof-of-concept**: an educational wizard that adopts intuitive imagery, compact profit/loss charts, and a simplified option chain to facilitate first-time research, analysis, and trading.

Result

From 2022 to 2024, *Option Trade Builder* contributed to **+6% revenue** and **+38% net asset flow** for the firm. We also leveraged the IA and our UX research findings to build its successor, *Option Strategy Builder* (not shown).



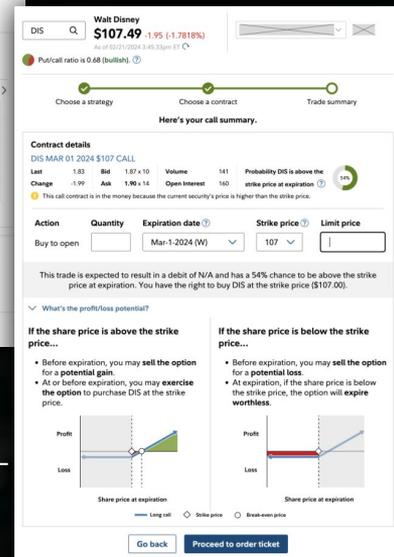
Live version of *Option Trade Builder* (as of February 2024).



Step three: summarize steps one and two to reinforce the user's knowledge of their strategy, then allow them to populate an order ticket.

Step one: gauge user's sentiment for a stock, then suggest compatible strategies, and educate.

Step two: accustomize user to the option chain, and help them choose an option contract to buy or sell.



Chris Daley

Experience Design Portfolio

Envisioning a new experience to catch up to competitors

Organization & Role

I served as a UX Designer for the institutional investor (financial advisor) business at Fidelity Investments, a global financial technology & services and brokerage firm.

Situation & Tasks

Fidelity's *Wealthscape* brokerage platform was missing out on a **potential revenue stream** by lacking support for multi-leg option (MLO) strategies, making it difficult for users to make optimal trades.

Action

We conducted extensive user research and usability testing with multiple prototypes to create a **new MLO trading experience** within *Wealthscape* that is accessible, intuitive, and comprehensive of most available MLO strategies.

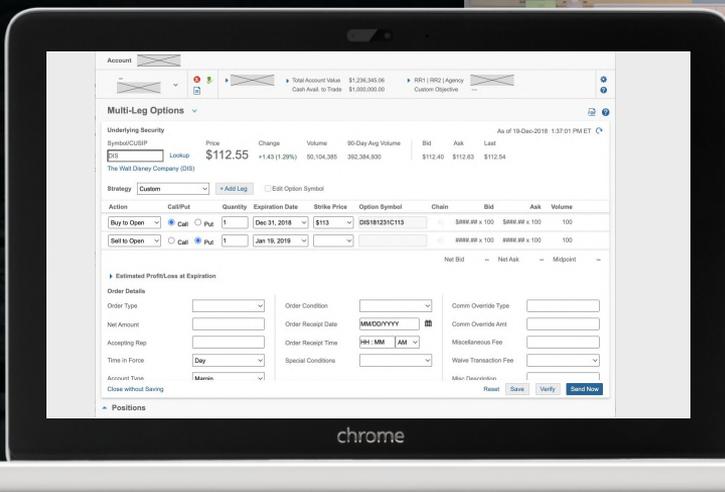
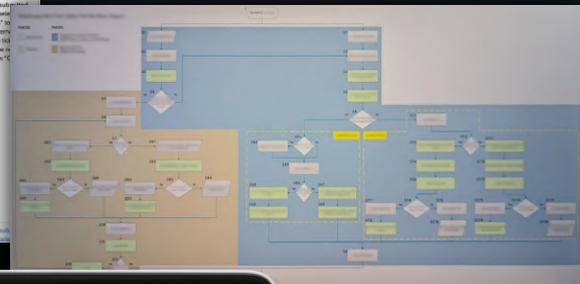
Result

From 2019 to 2020, *Wealthscape's* new MLO strategy capabilities contributed to **+9.5% operating income** for the firm.

Concept Model / Journey Map

Transaction Method	User	Initiate	Search	Initiate Order	Order Entry	Calculations	Preview Order	Order Action	Review
Order MLO (MVP)	RA/BD	Navigate to MLO in WFS menu	Select the single account search parameters, and enter a search term. View results, and select an account.	Review account carriage (include option trading level (e.g., 1-5)). Input Underlying Symbol. Select a strategy: correct quantity of legs will appear. If user selected "Buy" within each leg, then certain equity contractual fields, rather than option-contractual fields. Note: Fields that are shared across the entire MLO (e.g., Underlying symbol, Order Type, etc.) would be visually separated from fields that could differ within each leg (e.g., Action, Quantity, etc.).	Enter option leg details: Action, Cash Strike Price, and Expiration Date. Click "enter the option symbol directly" to open the Option Chain to select an option symbol. Enter Order Details: Time in Force, Account Type (e.g., Cash Margin, Order Type (e.g., Net Debit, Net Credit, Special Conditions, etc.)), and Account Type should default to Margin, if applicable. Time in Force should default to Day, Order Type, while selectable by the user, will populate based on option leg calculations.	Calculate and Review: summary and details of MLO, including Net Brokerage, Principal Order Amount, and Estimated P/L/E at Expiration.	(Optional). Verify MLO Review: summary and details of MLO and Estimated Principal Order Value.	Submit order OR Save order. Unmet \$0.00 order will appear in the embedded Orders ticket in "Orders - Unmet".	View confirmation page. If user submitted order, user should see the entry Orders ticket in "Orders - Unmet".
Cancel and Reorder	RA/BD	Navigate to Order Search	If desired, select key	Select order and "Cancel and Reorder" Order type	Has Order Form for MLO (MVP)	Yes/No	Yes/No	Submit order the embedded option list	View confirmation page

Segment of our concept model of the main MLO trade workflow.



User flow diagram for a specific strategy's workflow (note: photo of diagram is blurred for confidentiality).

Sample of an interactive Axure prototype that I created for a moderated usability testing study.



➤ Organization & Role

I served as an Experience Designer for FM, a worldwide loss prevention services company.

➤ Situation & Tasks

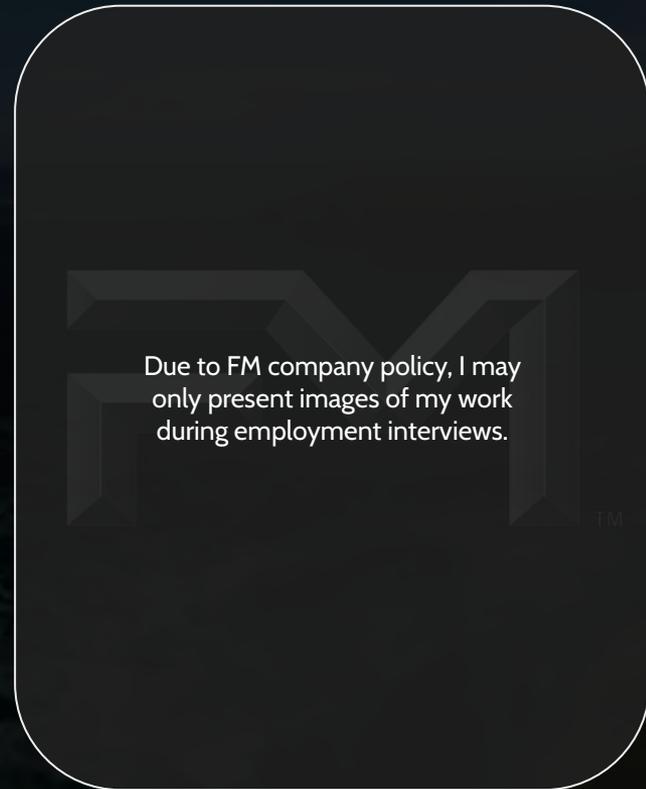
FM's design system needed additional resources to ensure that it continued to meet the needs of our designers, developers, and product owners, in both **upkeep and innovation**.

➤ Action

1. I conducted a comprehensive audit of our design system Figma file to document and fix inconsistencies between it and our user-facing design system repository, as well as audited our customer-facing platform to **ensure consistency** with the design system.
2. I designed and documented a **series of animation tokens** (and accompanying usage guidelines) for many interactive UI components within the design system.
3. Utilizing Figma variables (& modes), components (& variants), properties, auto layout, versioning/branching, and other features, I upgraded many of our UI components to provide greater **flexibility and robustness** in support of FM's designers and product owners. This effort included component states (e.g., hover, focus, error, etc.) and light/dark mode.

➤ Result

Our design system has **matured** and is **better equipped to support our organization**—for now, and for the future.



Chris Daley

Experience Design Portfolio

Designing for the engineers of today and tomorrow

Organization & Role

I served as a Visual Designer for Dassault Systèmes, a multinational 3D product design and simulation software corporation.

Situation & Tasks

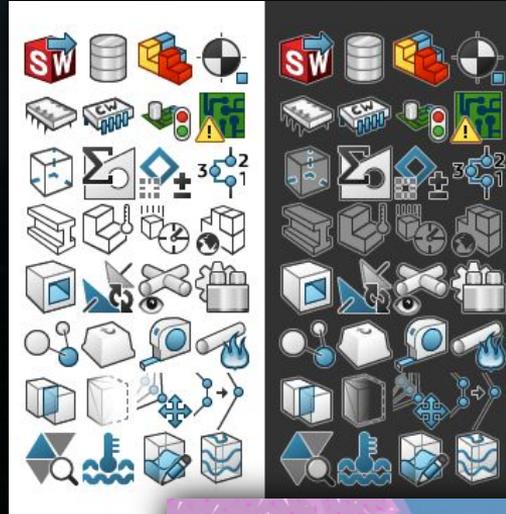
1. The *SOLIDWORKS* user interface **appeared outdated** in comparison to competing CAD software.
2. We needed **fun and appealing assets** for the new *Apps for Kids* creativity app suite.

Action

1. I produced **thousands of “refreshed” icons** that were scalable, accessible, and met design system standards.
2. I **illustrated** numerous profile avatars, backgrounds, and other assets.

Result

I assembled an “asset pack” with Photoshop automation scripts I had written and instructions to **allow future designers to pick up and continue** my icon design work with ease.



Small sample of several thousand *SOLIDWORKS* icons that I had produced, in both light and dark modes.



Two of my *Apps for Kids* illustrations, which serve as backdrops for the 3D creations that kids imagine and build.

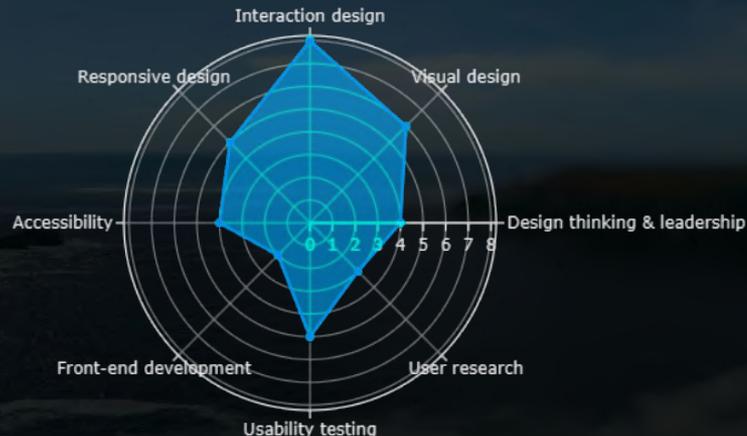
Chris Daley

Experience Design Portfolio

About me

With over 12 years of professional experience working with global organizations in UX design, visual and interaction design, animation, and 3D generalist roles, Chris Daley (he/they) is an accomplished creative professional striving to bring **joy and satisfaction** into the experiences he creates.

Chris is a strong proponent of **lean UX** and understands that creative design of any kind **does not happen in a silo**. It takes a team to create something extraordinary, and he values efficiency, compromise, and constant collaboration as the means to drive success.



Solving puzzles is one of my favorite pastimes, and designing complex interactions and intuitive information architectures is always a fantastic challenge. Throughout my journey as a Senior UX Designer, I am continuing to lean into inclusivity and accessibility to ensure that all users can find joy and satisfaction while interacting with the products I have designed!



“Vision without action is a daydream. Action without vision is a nightmare.”

– Japanese proverb



Thank you!

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