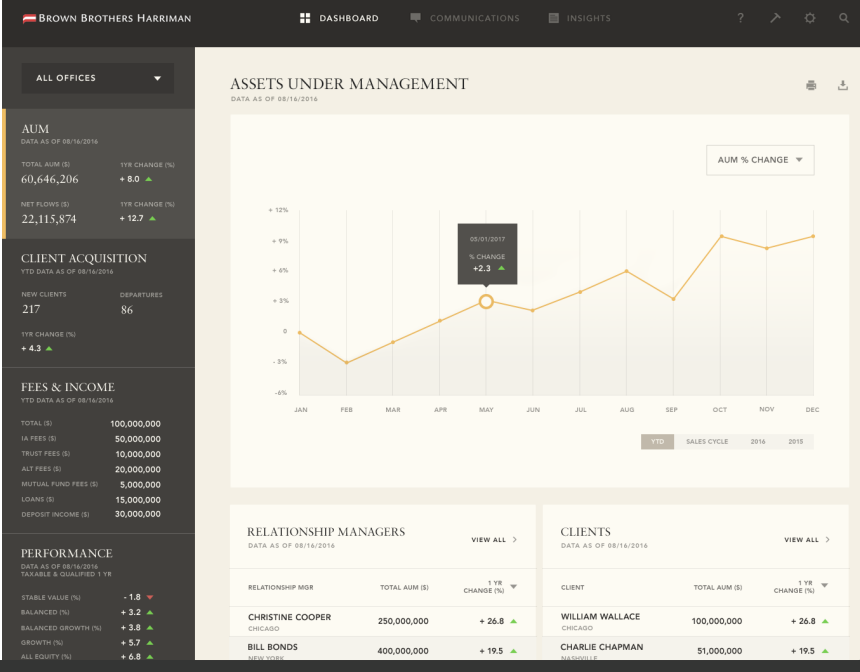


BROWN BROTHERS HARRIMAN

Client and Manager private equity portals

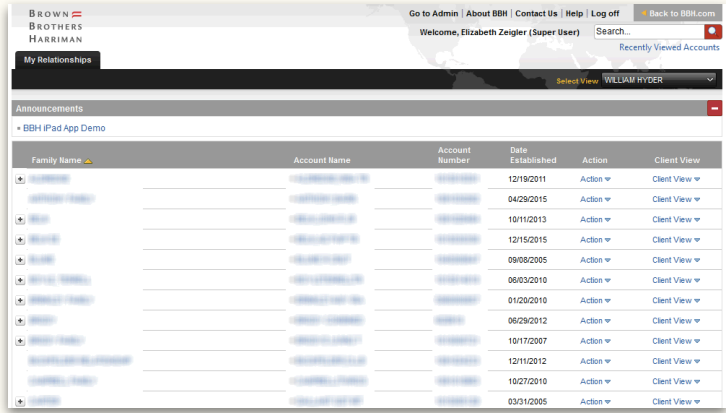


Discovery Phase

Workshops aligned with designs prints allowed us work at an accelerated pace, keeping our clients involved, while staying focused on individual tasks that would align with the wholistic vision

Problem Statement

Brown Brothers Harriman came to Isobar knowing that to compete with the latest digital investment platforms they needed to update their client and advisor portals to reflect the latest technology and customer centered features.



User stories



Clients
Clients want to self-serve when it comes to their finances but the current portal lacks the tools to allow them to find answers to their most common questions quickly .



Advisors
Brown Brothers Harriman advisors are considered some of the best in the country but the tools they have don't show it. They spend countless hours doing by hand what could be automated – freeing them up to spend more time with clients.



Leadership
Brown Brothers Harriman's leaders came to Isobar knowing that to compete with the latest digital investment platforms they needed to update their client and relationship management tools.

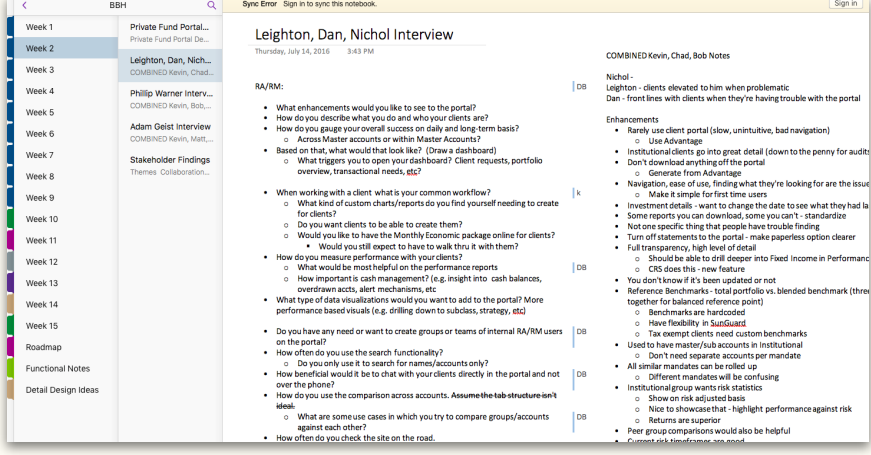
Competitive study

Companies like Betterment and Wealthfront are disrupting the investment industry with automated tools and modern web experiences that give customers both the knowledge and empowerment to invest with confidence.



User research

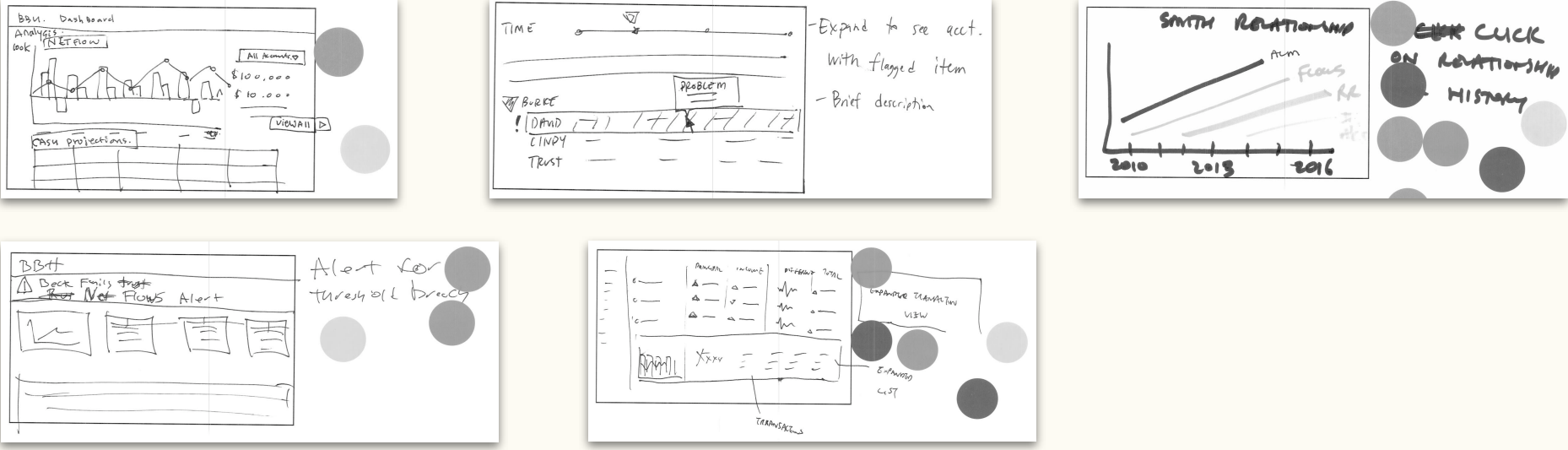
Clients and advisors were interviewed throughout the design process to discover their needs specific to Brown Brothers Harriman and to validate our solutions.



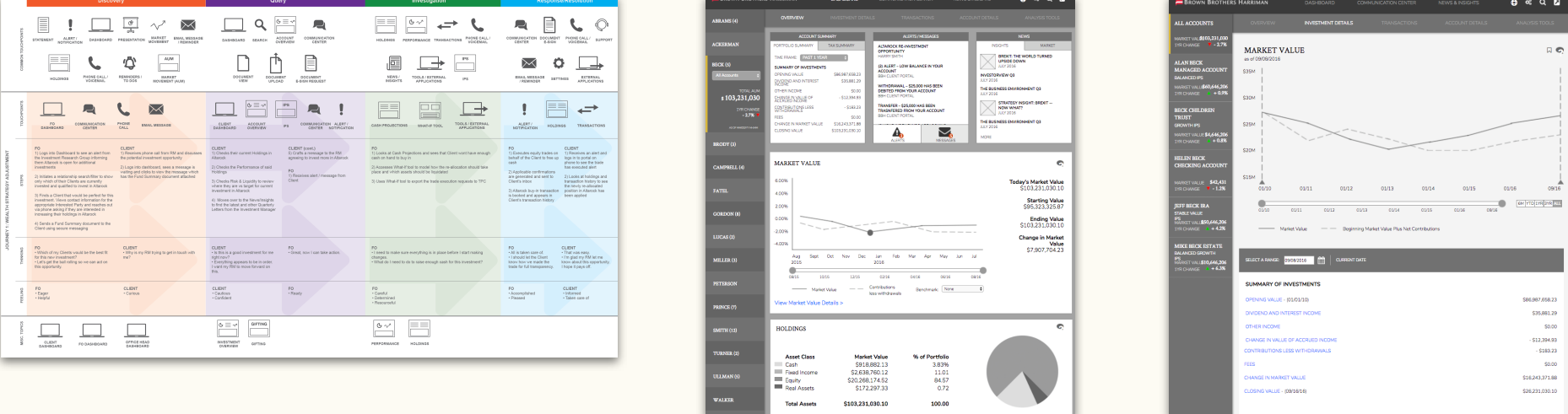
Design Phase

We conducted workshops aligned with design sprints that allowed us to work at an accelerated pace, keeping our clients involved, while staying focused on individual tasks that would align with the wholistic vision

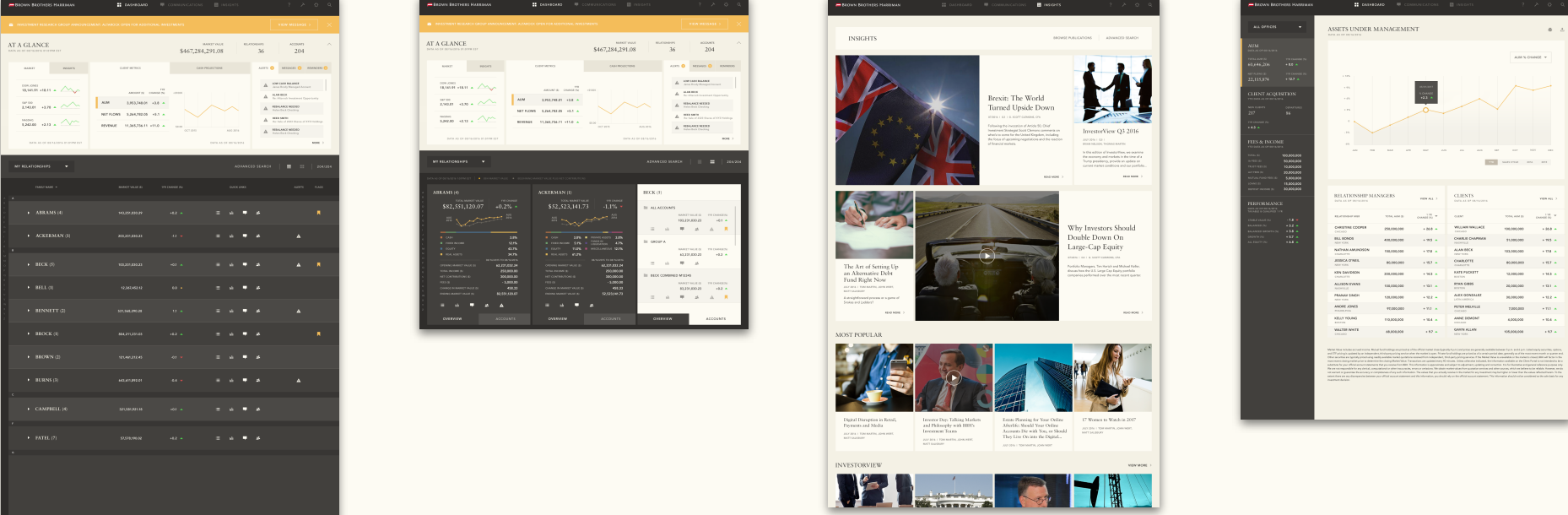
Sketches



Flows & Wireframes



Visual Designs



Results

The development efforts are being handled internally at Brown Brothers Harriman and are currently underway with a late 2018 launch date targeted.

Testing is showing increased user satisfaction and a reduction in requests for help by both investors and advisors.

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