YOOCH WAN

Principal / Lead Product Designer (Full-Stack, Enterprise & Financial Systems)

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PROFESSIONAL SUMMARY

Data-savvy, technically fluent Principal / Lead Product Designer with 20+ years' experience designing complex, data-intensive platforms across banking, asset management, trading, SaaS, and enterprise environments.

Proven record of delivering quantifiable ROI through improved usability, operational efficiency, and measurable cost savings for both users and the business – reducing critical workflows by up to 99% through automation, intelligent decision support, human-in-the-loop systems, UI and interaction design optimisation, and workflow re-engineering.

Specialist in complex systems and Human-AI interaction, designing AI-enabled products that balance algorithmic insights with user trust, oversight, and control in high-risk, large-scale settings.

Comfortable working in multi-disciplinary teams or solo.

CORE SKILLS

Business & Design Thinking • Product Strategy • UX / Product Design • Complex Systems Design • Financial Systems UX • Automation & AI Systems Design (Human-AI Interaction) • Design Systems • Data Visualisation • User Research • Information Architecture • Interaction Design • UI & Visual Design • Prototyping (Figma, Axure, HTML/CSS/JS) • Accessibility (WCAG) • Stakeholder Management • Design Leadership

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PROFESSIONAL EXPERIENCE

Insight Investment (BNY Mellon) — *Senior UX Designer, Lead / Principal Level*
Oct 2021 – Present

Lead Designer – Fusion Trading Platform (Order Modelling & Dealing)

- **Led design of a new front-office trading suite** replacing legacy platforms across order modelling, RFQ, execution, and post-trade workflows.
- Designed **Position Explorer** enabling real-time OTC derivatives risk modelling, reducing workflow time from **up to 10 days to 1–2 hours (60–99% efficiency gain)**.
- Designed **Order Trade Blotter** integrating Bloomberg B-Pipe, Symphony, iPushPull, and internal systems into a single end-to-end workflow.

- **Redesigned a client communications application,** re-engineering workflows for time-sensitive deleveraging events, significantly **reducing operational, reputational, and financial risk** while **delivering universally praised usability and 86–96% time savings**.
- Partnered with Product, Engineering, BAs, Portfolio Managers, Investment Analysts and Traders to resolve high-risk workflow pain points and improve adoption.

Lead UX/UI Designer – Investment Solutions – "Flow", "Optimiser" and **"Onyx"**

- Defined UX for DB pension portfolio monitoring (cashflows, surplus, risk, what-if scenario analysis).
- Designed a widely praised AI-powered portfolio management and trade optimiser tool for US Portfolio Managers and Traders.
- Designed interfaces used daily by Portfolio Managers, Client Solutions, and Quant teams.

Governance, Design Systems & Data Visualisation

- Core member of UX Community of Practice; set UX direction across multiple products and teams, peer-reviewed work, and mentored designers.
- Reformulated data visualisation standards, improving readability and consistency across advanced data visualisations.

London Stock Exchange Group (LSEG) (formerly Refinitiv) — *Principal Product Designer*
Jan 2021 – Oct 2021

- **Led UX strategy** across multiple platform and workflow enablement teams.
- Defined the **standardised UX framework** for the flagship **Workspace** product.
- Introduced role-based, card-driven navigation and a consistent spatial layout model adopted across future applications.
- Led foundational design work for the **Halo Design System**, improving cross-team consistency and delivery speed.
- Mentored designers, interviewed candidates, and delivered rapid prototypes.

Refinitiv (formerly Thomson Reuters - Financial & Risk Division) — *Principal / Senior Product Designer*
Apr 2019 – Jan 2021

- **Lead Designer for a new financial desktop framework and ecosystem**.
- Defined core interaction patterns and framework components used across Trading, Wealth, and Risk applications.
- **Led Design Standards Governance** and delivery of a multi-product Design System.
- Accessibility, Trading, and Charting SME and Chair of the Interaction Design Sub-Committee.
- Designed a Quality & Performance Monitoring application and multiple trading tools.

Lloyds Banking Group — *Senior UX Designer (Contract)*
Nov 2017 – Mar 2019

- Lead UX Designer for end-to-end digital commercial lending journeys.
- Designed multi-user digital documentation and e-signing flows rated **4.9/5 for ease of use**.
- Contributed to a **94% reduction in time-to-cash** by redesigning tracking and approval workflows, **millions of pounds saved** from reduction in manned call-centre usage.
- Designed internal pricing tools and third-party portals used by Relationship Managers and solicitors.

Thomson Reuters (Financial & Risk Division) — *Senior Interaction Designer*
Oct 2015 – Oct 2017

- Delivered UX across the **Eikon** financial research and analytics platform (~200 apps)
- Reduced onboarding actions from **58 to 26 (55% improvement)** for a client onboarding system.
- Designed and improved workflows for FX, Equities, Fixed Income, Commodities, Pricing, Research, Charting, Pre- and post-trade analytics and reporting applications.
- Defined advanced search standards and reusable UI components adopted across products.
- Played a key role in a strategic programme to modernise third-party content governance, **managing complex supplier contracts and usage restrictions across 1,500+ data providers, reducing risk of regulatory fines** (annually $1m+) **from content-usage breaches**.

Earlier Career (Condensed)

HSBC Global Banking & Markets, UBS Investment Bank, PwC / FCA, Pitney Bowes —
Various Roles (UX / UI / Interaction Designer / Lead/Senior Web Designer & Developer)
2004 – 2015

- Led UX/UI design for global **FX trading platforms, e-commerce pricing systems, client portals, and regulatory systems**.
- Reduced FX client onboarding time by **92%** on a wholesale pricing platform.
- Delivered award-winning research and analytics portals and mobile trading applications.
- Sole UX/UI consultant for an industrial AI workflow orchestration system for HMRC and UK retail banks.
- Sole UX/UI consultant on FCA projects, completing delivery **4 months ahead of schedule**.

EDUCATION & DEVELOPMENT

- Completed professional development in **HCI for AI Systems Design** (University of Cambridge Online)
- Background in **Business Computing Systems** and front-end development

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ADDITIONAL INFO

Portfolio: **yoochwan.com**

LinkedIn: **linkedin.com/in/yooch**
41 Recommendations. Endorsements: Experience Design – 63 | UI Design – 73 | Interaction Design – 35