DESIGN CASE STUDY · 2026

Redesigning the ICG PMA Dashboard

A daily workspace for Performance Measurement Analysis: problem, personas, structure, and the standards the ten screens are built on.

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Overview

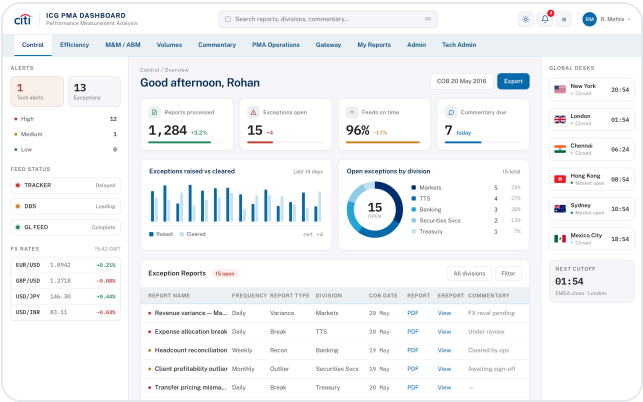

Fig. 1: Redesigned Control tab: status strip, exception queue, feed health, and global desk rail.

Fig. 2: Sign-in: Citi mark, skyline backdrop, and a single glass card carrying SOE ID, password, and the SafeWord fallback.

01: CONTEXT

The problem

Performance Measurement Analysis sits between the divisions that generate revenue and the finance leadership that has to explain it. The dashboard is the daily entry point: analysts open it before the close, work exceptions, chase feeds, and publish commentary that a CFO reads the same afternoon.

The legacy screen was built as a container for ten independent modules rather than a workspace. Everything is visible at once and nothing is prioritised: a decorative welcome panel occupies the largest area, an empty exception table sits below the fold, alert counts appear as icons without context, and the feed status lights use a traffic-light idiom with no label explaining what red means or who owns the fix. Chrome: collapsible bars, a toolbar of eighteen unlabelled icons, a world-clock rail: consumes roughly a third of the viewport before a single number is shown.

The solution

The redesign replaces the flat container with a prioritized workspace. KPIs and the exception queue lead the page instead of a decorative welcome panel; the feed and alert indicators carry labels and owners instead of unexplained color; and the eighteen-icon toolbar and world-clock rail are reduced to the controls people actually use, with everything else moved into labeled panels a user opens on demand. Ten modules remain reachable, but the page now opens on the one question that matters first: is today normal, and if not, what needs attention.

Business goal

PMA exists so that every number reported to ICG leadership can be explained the same day it moves. The redesign serves that in three ways: shorten the time between an exception appearing and an analyst acting on it, raise the share of variances that carry written commentary before the divisional call, and reduce the manual reconciliation effort behind each reporting cycle.

Those outcomes protect the control environment and the credibility of the reporting pack, and they free analyst hours currently spent reconstructing state for analysis the business actually asks for.

> The cost is time to first decision. An analyst cannot tell from the landing screen whether the day is normal or broken, so the first ten minutes of every morning are spent reconstructing state from four separate panels.

02: APPROACH

What the redesign is optimising for

PRINCIPLE	APPLIED
Status before navigation	A four-metric strip answers "is today normal?" above everything else, on every tab.
One primary object per tab	Each tab resolves to a single table of work (exceptions, tasks, feeds, requests) rather than a page of panels.
Labels, not lights	Feed and job status carry a word ("Delayed", "Retrying") and an owner alongside the colour.
Numbers set in monospace	Figures align down the column so variance is visible without reading each row.
Chrome earns its space	The clock rail became a desk-status rail: market open or closed, next cutoff, live times.

03: THE SOLUTION

A single workspace, ten views of the same day

The redesign keeps the existing information architecture (the same ten tabs people already know) but changes what each one is for. A tab is no longer a container of panels; it is one queue of work with the status that qualifies it sitting directly above. The shell is constant across all ten: Citi

header, tab band, context rail on the left, primary content in the middle, desk status on the right.

Three moves carry most of the improvement. The welcome graphic is replaced by a four-metric status strip, so the landing screen answers the first question without a click. Every status is written as a word with an owner, so a red dot no longer requires interpretation. And every table is the same table: same column rhythm, same severity marker, same pagination: so learning one tab teaches the other nine.

TAB	PRIMARY OBJECT	ANSWERS
Control	Exception reports	Did the night run clean, and what needs working?
Efficiency	Cost-to-income by division	Where is the cost base moving, and why?
M&M / ABM	Allocation drivers	What is driving allocated cost this cycle?
Volumes	Product throughput	Are volumes and capacity within tolerance?
Commentary	Commentary queue	What is due, submitted, or overdue?
PMA Operations	Task queue with SLA	What is at risk before the next close?
Gateway	Feed transfers	Which feeds landed, failed, or are retrying?
My Reports	Saved and scheduled runs	What runs for me, and when did it last run?
Admin	Access requests	Who is waiting on entitlements?
Tech Admin	Batch and service health	What failed on the platform overnight?

Fig. 1 and Fig. 2 show the Control tab and the sign-in screen; Fig. 3 to Fig. 6 cover the analysis tabs, the dark theme, and the phone build.

citi ICG PMA DASHBOARD
Performance Measurement Analysis
Search reports, divisions, commentary... ⌘K
RM R. Mehta

Control | Efficiency | M&M / ABM | Volumes | Commentary | PMA Operations | Gateway | My Reports | Admin | Tech Admin

ALERTS
1 Tech alerts
13 Exceptions
High 12
Medium 1
Low 0

FEED STATUS
TRACKER Delayed
DBS Loading
GL FEED Complete

FX RATES 15:42 GMT

EUR/USD	1.0942	+0.21%
GBP/USD	1.2718	-0.08%
USD/JPY	146.30	+0.44%
USD/INR	83.11	-0.03%

Efficiency / Cost and productivity
Efficiency
COB 20 May 2016 | Export

Cost-to-income 58.4% -1.6pt
Cost per trade $4.12 -$0.21
STP rate 93.7% +0.8pt
Manual touches 2,140 +112

Expense run-rate by division
3 months | 6 months | 12 months | YTD
Direct and allocated expense, 12 months to May 2016
40M 30M 20M 10M 0
Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May
Markets $142M Banking $118M TTS $96M Securities Svcs $56M

Cost efficiency vs scale
Bubble size = allocated cost
Divisions below the median line convert volume to cost more efficiently.
Securities Svcs
Banking
median 56%

GLOBAL DESKS
New York Closed 20:54
London Closed 01:54
Chennai Closed 06:24
Hong Kong Market open 08:54
Sydney Market open 10:54
Mexico City Closed 18:54

NEXT CUTOFF
01:54
EMEA close · London

Fig. 3: Efficiency: cost-to-income by division, a bubble plot of cost against scale, and productivity levers.

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M&M / ABM / Allocation model
Measurement & Management — ABM
COB 20 May 2016 | Export

Allocated cost $412M +1.4%
Unallocated pool $26M -$3M
Drivers in model 38 +2
Cycle completion 87% day 6 of 8

Cost pool composition
$412M allocated
Trade volume $96.2M 23%
Headcount $88.7M 21%
Technology consumption $74.5M 18%
Client accounts $61.0M 15%
Real estate $52.4M 13%
Support services $39.2M 10%

Allocation drivers
May 2016 cycle | Rebalance

DRIVER	BASIS	ALLOCATED	VARIANCE	SHARE OF POOL
Trade volume	Executed trades	$96.2M	+2.1%	23%
Headcount	FTE by entity	$88.7M	-0.6%	21%
Technology consumption	Compute hours	$74.5M	+4.8%	18%

GLOBAL DESKS
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NEXT CUTOFF
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Fig. 4: M&M / ABM: cost pool composition as a treemap above the allocation driver table.

Fig. 5: The same Control screen in dark theme. Every colour resolves through a token, so both themes share one definition.

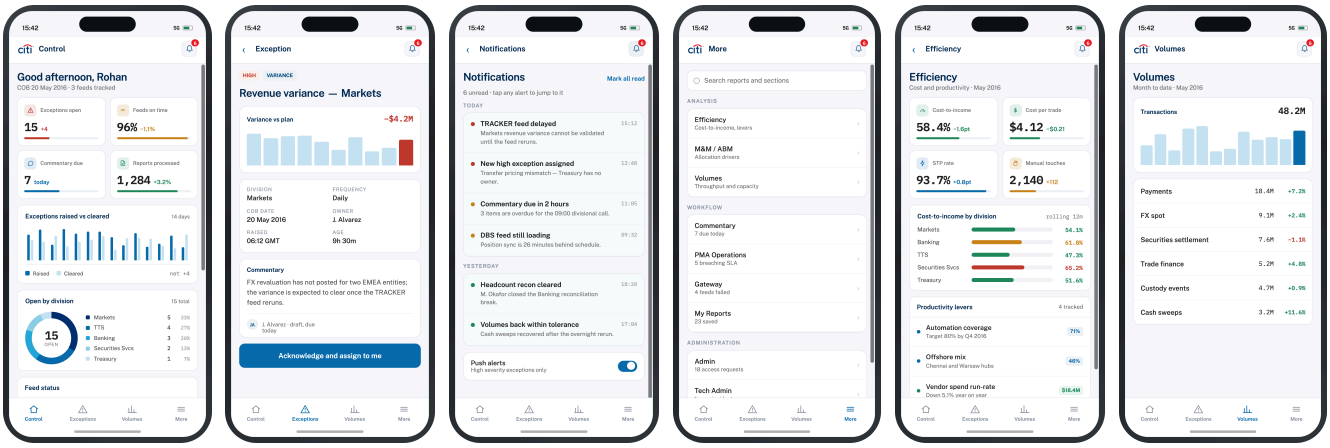


Fig. 6: Phone build: triage list, exception detail, notifications, the More sheet, a section screen, and Volumes. Tables become cards, ten tabs become four plus More, and the KPI, chart and donut treatments carry over from desktop.

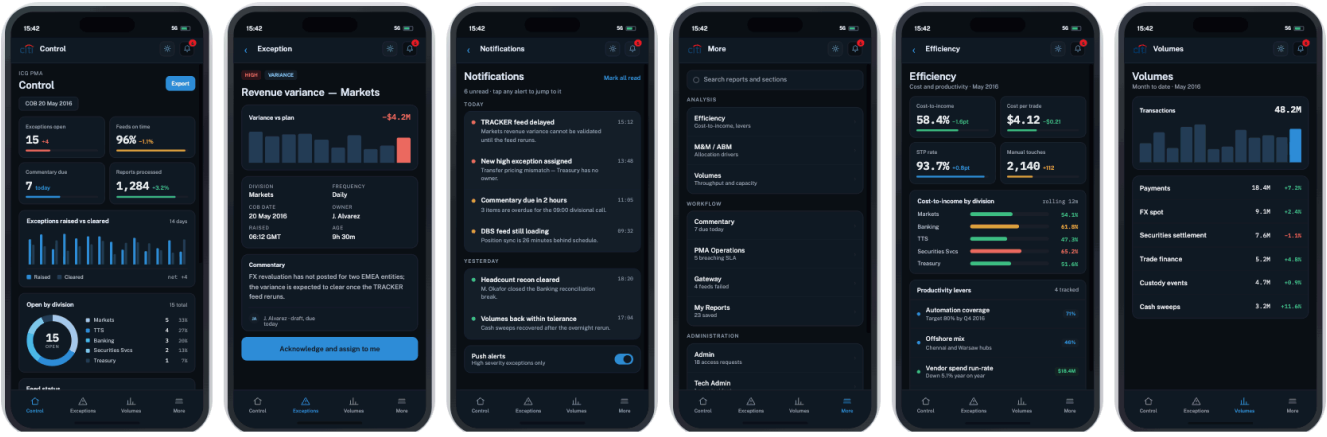


Fig. 6b: The same six phone screens in dark theme: Control, exception detail, notifications, More, a section screen, and Volumes.

04: STRUCTURE

Sitemap

PERSISTENT SHELL: PRESENT ON EVERY SCREEN

Global search · Saved layouts · Notifications · Alerts rail · Feed status · FX rates · Release notes · Global desks · Account menu

1 · Control

Status strip → Exception reports → Report / eReport → Commentary thread

Exception alerts · Favorite reports

2 · Efficiency

Cost KPIs → Cost-to-income by division → Division detail

Productivity levers

3 · M&M / ABM

Cycle KPIs → Allocation drivers → Driver detail

Rebalance · Cycle history

4 · Volumes

Throughput KPIs → Volume by product → Product trend

Rejects · Capacity headroom

5 · Commentary

Due / submitted KPIs → Commentary queue → Editor → Approval

Overdue view

6 · PMA Operations

Queue KPIs → Task queue → Task detail → Reassign

SLA at risk · Handover

7 · Gateway

Feed KPIs → Feed transfers → Transfer log → Retry

Inbound · Outbound

8 · My Reports

Saved reports → Report detail → Schedule → Share

Folders · Shared with me

9 · Admin

Access KPIs → Access requests → User detail → Approve / escalate

Roles · Recertification

10 · Tech Admin

Platform KPIs → Batch & service health → Job detail → Rerun

Incidents · Environments

Arrows show drill-down depth; items after the break are sibling views within the same tab.

05: WHO WE ARE DESIGNING FOR

Personas

RM

Rohan Mehta: PMA Analyst, Markets

PRIMARY

Opens the dashboard before 07:00 London and lives in it until the daily pack publishes. Owns 15–40 exceptions on a normal day and writes the commentary that explains them.

Needs: a ranked list of what broke, with ownership and age. **Frustration:** discovering a failed feed only after the variance it caused has been queried by the business.

PR

Priya Raman: Divisional Business Manager, TTS

CONSUMER

Logs in two or three times a week, usually to answer a question from her CFO. Does not know the data model and should not have to.

Needs: cost-to-income and volume trend for her division, plus the commentary explaining any move. **Frustration:** reports that arrive as attachments with no explanation of the variance attached.

AD

Ana Duarte: Operations Controller, PMA Ops

PRIMARY

Runs the daily queue across three regions and hands over at each close. Measured on SLA breaches and on the pack going out on time.

Needs: task ownership, time remaining, and a clean handover view. **Frustration:** SLA state living in a spreadsheet outside the tool.

DW

Dan Whitfield: Platform Admin, Technology

SECONDARY

Watches batch health and entitlements. Interested in the dashboard only when something fails or an access recertification is due.

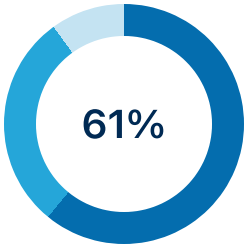
Needs: job status with duration and environment, and a queue of pending access requests. **Frustration:** being told about a failure by an analyst rather than by the platform.

SUPPORTING RESEARCH

User survey

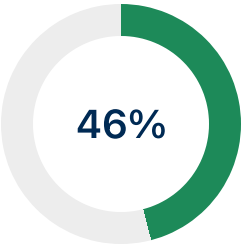
A pre-launch survey of 42 PMA users (analysts, controllers, business managers, and admins) checked the redesign's core bets before rollout: can people find the most severe exception fast, do they understand status without asking someone, and does the new hierarchy feel like

an improvement.



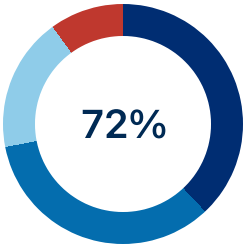
Spot the worst exception in 10s

- Always: 61%
- Sometimes: 29%
- Rarely: 10%



Understood feed status unaided (legacy)

- Understood: 46%
- Had to ask: 54%



Satisfaction with the redesign

- Very satisfied: 38%
- Satisfied: 34%
- Neutral: 18%
- Dissatisfied: 10%

06: THE CORE JOURNEY

Primary use case: the morning triage

Rohan, 06:50 London, day after COB. Target: exceptions understood and commentary drafted before the 09:00 divisional call.

1. **Establish whether the night ran clean.**
   Control KPI strip: reports processed, exceptions open, feeds on time, commentary due.
2. **Check feed health before trusting any number.**
   Feed status panel names each feed, its state, and whether it is retrying.
3. **Work the exception list by severity.**
   Exception Reports table, severity dot per row, division and COB date in line.
4. **Confirm the driver behind a cost variance.**
   M&M / ABM allocation drivers with variance and share of pool.
5. **Draft and submit commentary.**
   Commentary queue with due date, author, and approval state.
6. **Hand over to the next region.**
   Global desks rail shows which desks are open; PMA Operations shows open tasks and SLA.

Task flow by user

One exception, four lanes. Each row is a user; the columns are the stages of a single working day. Handoffs are where the exception leaves one lane and enters another: the points the redesign had to make visible.

LANE	DETECT	TRIAGE	INVESTIGATE	EXPLAIN	CLOSE
Dan Platform admin	Batch alert fires Tech Admin		Rerun feed Gateway		Confirm job clean
Ana Ops controller	Sees failed feed Gateway	Assigns owner, sets SLA PMA Operations	Tracks countdown		Hands over to next region
Rohan PMA analyst	Opens Control, reads KPIs	Works exception list by severity	Checks driver variance M&M / ABM	Drafts and submits commentary	Marks exception cleared
Priya Business manager			Asks why her division moved	Reads commentary Efficiency	Takes answer to the CFO

Three handoffs decide whether the day runs on time: platform to operations at detection, operations to analyst at triage, and analyst to business manager at explanation. Each one is a place where state used to live in email or a spreadsheet, and each now has a screen.

Supporting use cases

USE CASE	PERSONA	ENTRY POINT
Feed failure recovery	Ana, Dan	Gateway → failed transfer → Tech Admin job detail and rerun.
Explaining a divisional variance	Priya	Efficiency → cost-to-income by division → linked commentary.
Month-end allocation cycle	Rohan	M&M / ABM → cycle completion → driver rebalance.
Capacity and volume review	Priya, Ana	Volumes → product throughput, rejects, headroom.
Access recertification	Dan	Admin → pending requests and privileged roles.
Recurring personal reporting	Priya, Rohan	My Reports → saved and scheduled runs.

07: MEASUREMENT

How to know it worked

MEASURE	TODAY	TARGET
Time to first decision on the landing screen	~10 min	Under 60 seconds
Exceptions resolved before the 09:00 call	Roughly half	80%
Feed failures found by the platform, not by an analyst	Inconsistent	All P1 and P2 feeds
Commentary submitted by due date	3 overdue / day	Zero overdue
Clicks from landing to an exception's commentary	6+	2

08: EXPERIMENT

A/B test: exception table design

The table is where analysts spend most of their session, so it is the one component worth testing rather than deciding by taste. Both variants carry identical data, columns, and filters. Only the row treatment differs.

Hypothesis: encoding severity as a leading status pill and grouping rows by division lets an analyst pick the first row to work on faster than a flat list with a severity dot, without increasing mis-selection.

Exception Reports 15 open

All divisions | Filter

REPORT NAME	FREQUENCY	REPORT TYPE	DIVISION	COB DATE	REPORT	EREPORT	COMMENTARY
Revenue variance — Marke...	Daily	Variance	Markets	20 May	PDF	View	FX reval pending
Expense allocation break	Daily	Break	TTS	20 May	PDF	View	Under review
Headcount reconciliation	Weekly	Recon	Banking	19 May	PDF	View	Cleared by ops
Client profitability outlier	Monthly	Outlier	Securities Svcs	19 May	PDF	View	Awaiting sign-off
Transfer pricing mismatch	Daily	Break	Treasury	20 May	PDF	View	—
Volume feed shortfall	Daily	Feed	TTS	20 May	PDF	View	TRACKER delayed
ABM cost driver drift	Monthly	Variance	Markets	18 May	PDF	View	Model refresh
Legal entity mapping gap	Weekly	Recon	Banking	18 May	PDF	View	Assigned to S. Patel

Records 1–15 of 15 ‹ 1 ›

Fig. 7: The table as built today on Control: severity dot, monospace dates, filter chips and record count above the header. This is variant A.

A Flat list, severity dot — Control

- Revenue variance 20 May
- Expense break 20 May
- Headcount recon 19 May
- Client outlier 19 May

B Grouped, status pill — Variant

MARKETS · 2

- HIGH Revenue variance 20 May
- MED ABM driver drift 18 May

TTS · 2

- HIGH Expense break 20 May
- HIGH Volume shortfall 20 May

TEST PARAMETER	DEFINITION
Primary metric	Time from tab load to first row opened.
Secondary metrics	Exceptions closed per session; rows opened then abandoned; scroll depth before first click.
Guardrail	Mis-selection rate: a low-severity row opened while a high-severity row is unworked.
Population	Analysts and operations controllers on Control and PMA Operations. Business managers excluded.
Allocation	50/50 by user, sticky for the whole test so nobody switches layouts mid-cycle.
Duration	Three weeks, including one month-end, minimum 400 sessions per arm.
Decision rule	Ship B if time to first row improves 15% or more with no guardrail regression. Otherwise keep A.

09: STANDARDS

Table dos and don'ts

DO

- ✓ Right-align and set every figure in monospace so columns scan vertically.
- ✓ Lead each row with the object's name, not its identifier.
- ✓ Pair every colour with a word: "Failed", "Retrying", "Complete".
- ✓ Keep one row height across all tabs; density is a global preference, not a per-table choice.
- ✓ Show the record count and the filter state above the header row.
- ✓ Let long text truncate with an ellipsis and reveal in full on the row detail.

DON'T

- ✗ Encode status in colour alone, or in an icon with no label.
- ✗ Use full-cell background fills; they compete with the severity signal.
- ✗ Add vertical rules between every column: hairline row dividers are enough.
- ✗ Exceed eight columns; move the rest to the row detail.
- ✗ Wrap header labels to two lines, or abbreviate them past recognition.
- ✗ Paginate below 25 rows when the analyst's task is to work the whole list.

10: FOUNDATIONS

Tokens from the Citi design system

The redesign draws from the existing Citi palette rather than introducing new values. Blue carries navigation, action, and identity; gold is reserved for editorial accent in documentation and never used as an interface state; red is the brand mark and the alert state only.

BLUE: PRIMARY

Blue 800	Blue 700	Blue 600	Blue 500	Blue 300	Blue 050
#002A54	#002D72	#034C81	#056DAE	#25A6DA	#EFF3F8

GOLD: ACCENT

Gold 700	Gold 400	Gold 050
#745B2D	#B4975A	#F6F2EB

STATUS

Alert	Warning	Success
#C0392F	#C9861A	#1E8A5A

NEUTRALS

#222222	#555555	#5E5E5E	#DDDDDD	#EEEEEE	#F5F7FA

TOKEN	VALUE	WHERE IT APPEARS
color.action.primary	#056DAE	Primary buttons, links, active tab underline.
color.text.heading	#002A54	Page and section headings, row lead text.
color.surface.subtle	#EFF3F8	Tab band, table header row, KPI chip backgrounds.
color.border.default	#E5E9EE	Card outlines, header rule, rail dividers.
color.brand.mark	#EE1C25	Citi arc and the unread notification dot. Nothing else.
radius.card	12px	KPI cards, table containers, rail panels.
font.ui	Public Sans	All interface text, 11–28px.
font.numeric	IBM Plex Mono	Every figure, date, duration, and identifier.

Figures in this document are illustrative placeholders for the prototype. Replace with measured baselines before circulating.