Clarity Before Launch:
Strategic UX Content & Research

Company: Questrade Financial Group
Product: Questwealth - Satellite Portfolios
Role: Lead Content Designer
Scope: Moderated Research & Synthesis, Content Strategy & UX Writing, Voice & Tone System, Error Prevention Framework, Onboarding Flows, Stakeholder Alignment
Duration: Q1-2 2025

TL;DR

I co-led research and built the full UX content strategy for Questrade's Satellite Portfolios—designed to give investors more personalization within managed investing accounts.

While the product was paused before launch due to layoffs, our work directly influenced the decision to revisit core assumptions.

This project reflects how UX content, paired with qualitative research, can change what gets built—not just how it looks.

The Challenge

Questrade was introducing Satellite Portfolios to meet a growing need:

Investors wanted more control, personalization, and access to thematic investments—without going fully self-directed.

But early versions of the experience were:
- Vague ("What is a satellite portfolio?")
- Overwhelming (no guardrails or guidance)
- Prone to error and drop-off

Our job: clarify the value, reduce user hesitation, and build a system of content and flows that inspire confidence, not confusion.

Confused about product value

Unclear fee justification

Overwhelmed by choices
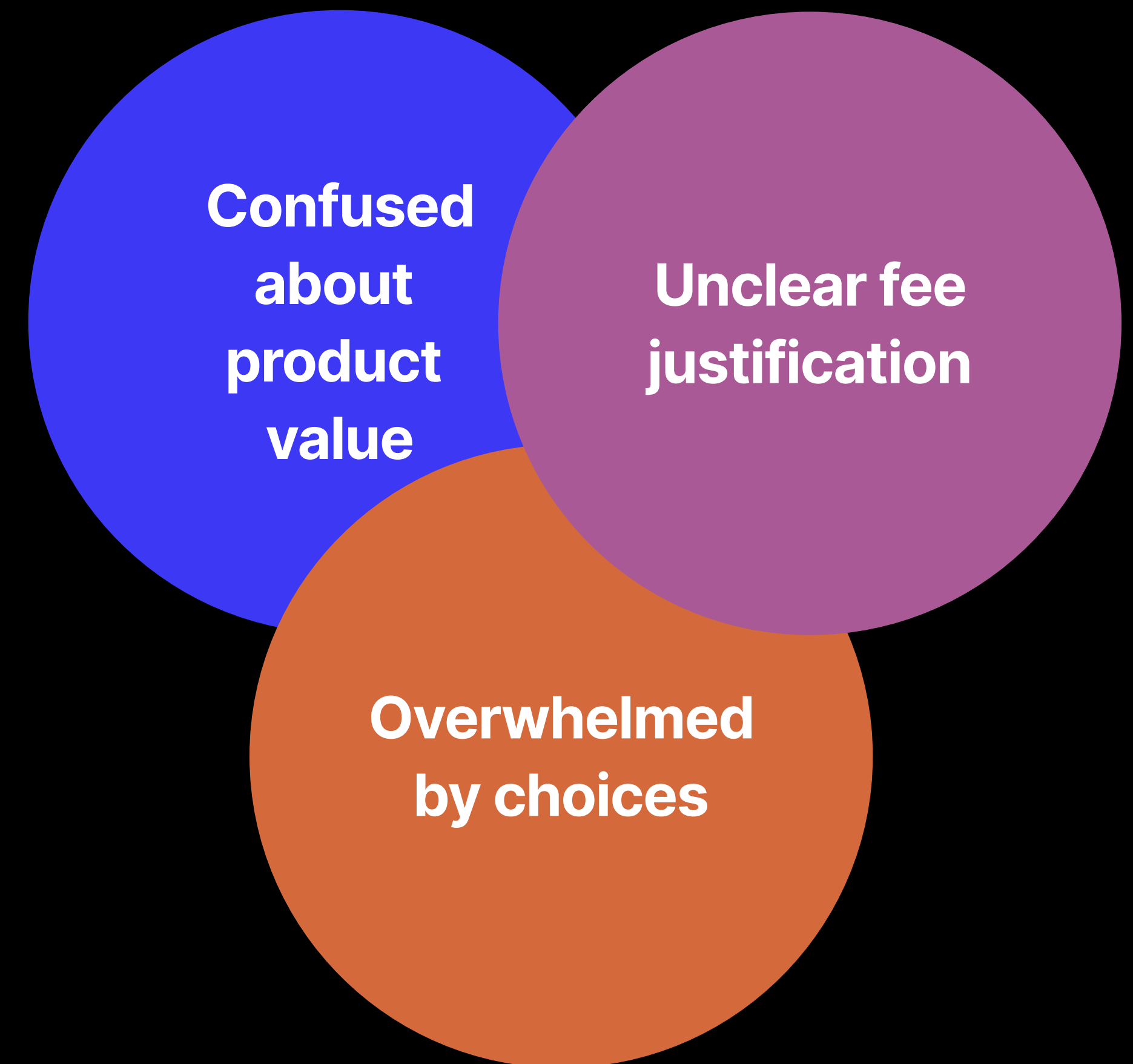
Our Users + Mental Models

Research highlighted 2 key user types:

🟢 Users with QWP (Managed) Accounts Only: newer investors, wanted personalization but feared mistakes

🔵 Users with Self-Directed + QWP accounts: experienced investors, skeptical of pre-built options

Across both groups, we heard:

"I don't want to mess up my core portfolio."

"I like the idea of themes, but I need help choosing."

"Is this like ETFs? What's the difference?"

"I'd pay for it—if I knew it was worth it."

Research Summary

We conducted 9 moderated interviews across QWP-only and SDI+QWP users

Key Findings:
 • Most users saw Satellite as a separate product, not an add-on
 • Users wanted transparency on holdings and impact
 • The term "Satellite" was confusing—many preferred "Thematic"
 • Appetite to pay was value-dependent, not price-dependent
 • Trust, clarity, and personalization mattered more than flashy returns
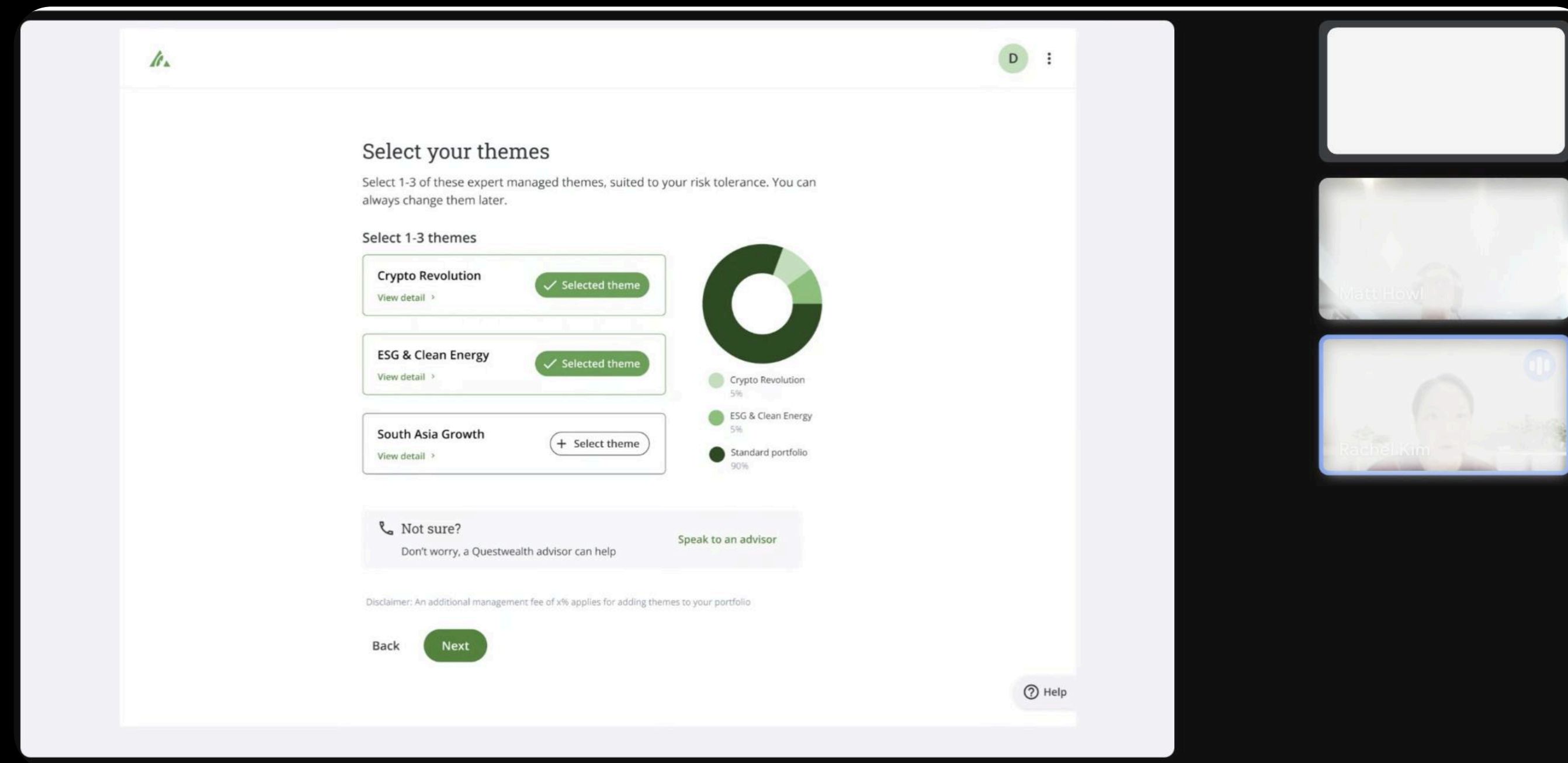
Strategic Insight

Our insight was ***simple but powerful***

We realized that even the best copy wouldn't fix a feature users didn't fully understand.

So we aligned with product to pause the launch and rethink the construct—starting with renaming, framing, and progressive education.

💡"This isn't just a UX or content challenge, it's a product clarity problem!"

UX Content Strategy Approach

I built a full UX content system to:

Reduce decision fatigue

Prevent setup errors

Educate users at the right time

Guide with tone—not overwhelm with jargon

This included:
- Voice & tone framework across journey stages
- Progressive disclosure microcopy
- Tooltips, modals, inline guidance
- Onboarding confirmation flows
- CTA testing & message sequencing

Example Microcopy Transformation

Scenario	Original	Revised
Onboarding	"Customize your portfolio"	"Choose a curated strategy that reflects what matters to you"
Tooltip	"You can adjust this later"	"Not sure what to pick? Pick one to start and you can fine-tune later."
Error	"Invalid entry"	"Minimum investment is $250. Try adjusting your amount."

Example Microcopy in Action

UX moment	Copy sample	Strategy
Portfolio Setup	You're about to invest in Tech Growth."	Sets clear expectation without jargon
Tooltip	"Want to change your portfolio? You can rebalance anytime."	Reduces anxiety, promotes agency
Error Prevention	"Minimum investment is $250. Try adjusting your amount."	Preemptive clarity vs. reactive error

Content Across the User Journey

Stage	Goal	Content Types	Examples
Discovery	Awareness	In-app banners, emails	"New! Smarter investing with expert-built themes"
Consideration	Education	Education FAQs, webinars	"Can I withdraw anytime? Yes, always in control."
Onboarding	Setup	Tooltips, default settings	"You're about to invest in Tech Growth. Confirm?"
Engagement	Confidence	Dashboards, nudges	"Your portfolio grew 4.2%. Reinvest your gains?"
Advocacy	Loyalty	Milestones, referrals	You reached $10K! Share your progress."

Writing & Dev-handoff Strategy

Although we were laid off before launch, our work created ripple effects:

Created modular copy blocks for dev implementation
  • Paired inline guidance with conditional logic to prevent edge-case confusion
  • Wrote reusable content patterns for onboarding and dashboards
  • Documented fallback messaging for "empty states," errors, and A/B test variants

What changed

Product team paused rollout to restructure the experience

Created alignment across CX, UX, Product, and Legal

Set the foundation for a flexible product model (Starter Pack vs. DIY)

Left behind a scalable, modular content system future teams can use

Thank you!

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Available immediately for contract roles & consulting opportunities.