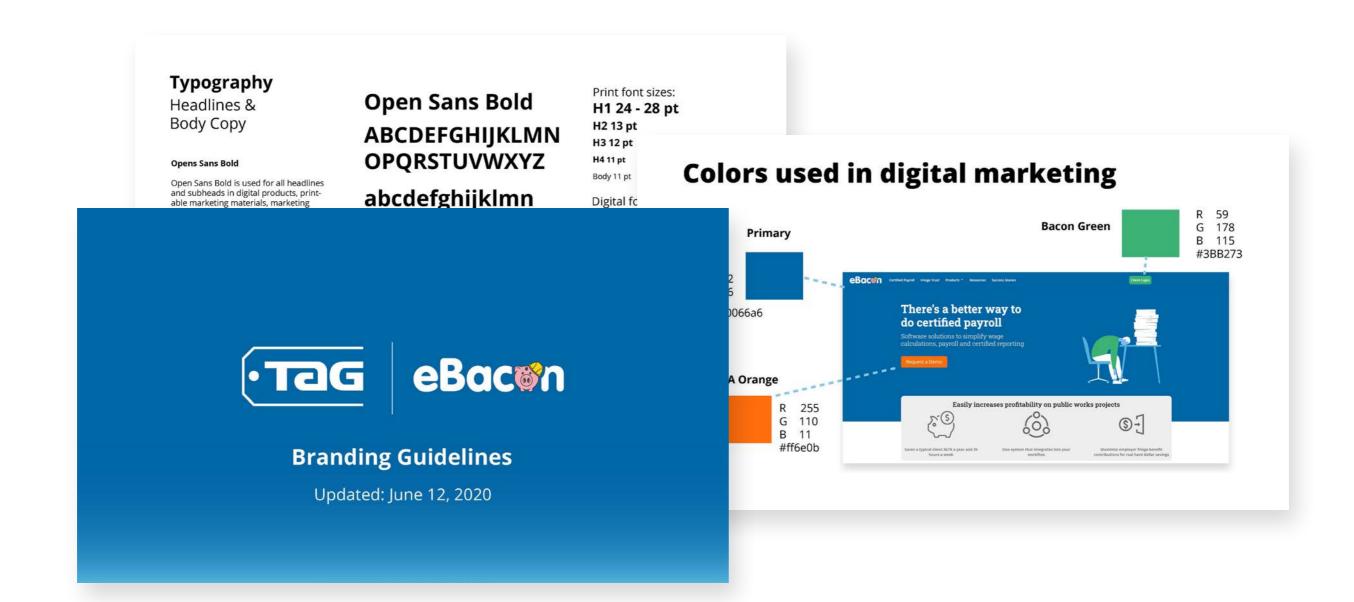


## **Dann Peterson**

Additional Projects from TAG Employer Services

(scroll down)





TAG & eBacon Brand Identity + Design System

Roles: Design & Art Direction



#### **Problem:**

Between two brands, TAG Employer Services & eBacon — both serviced under the same company, there was a lot of complexity between the two visual brand identities.

## **Challenge:**

TAG needed a way to be able to market and develop both of these products quickly and effectively while maintaining brand consistency throughout the whole customer experience.

## My role:

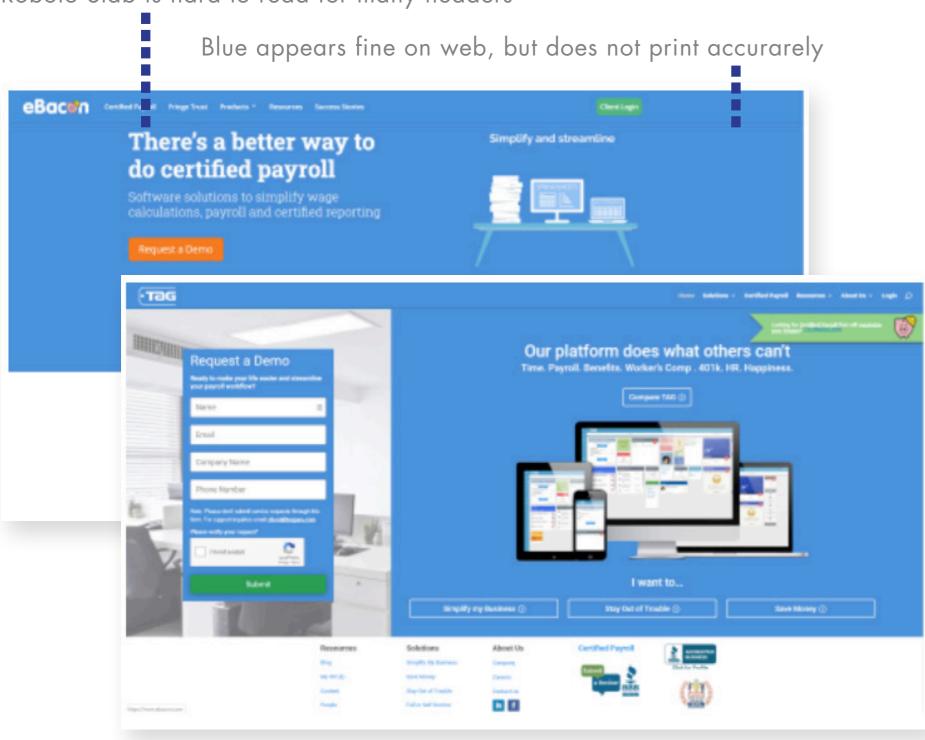
I revised, refreshed, and consolidated the two brands' visual assets into a single design system to help make scaling these two products more manageable.

## **Reviewed Current Brand Assets**

Determined what was working & what was adding unnecessary complexity

#### **NOT WORKING**

Roboto Slab is hard to read for many headers



#### WORKING

Open Sans is much more legible and available on a wider range of browsers and devices



This blue contrasts better with white type on screens and can be matched much easier for printable docs

## **Defined Logo Standards**

Created rules for logo usage for the two brands

## Logos

eBacon & TAG

#### **eBacon**

The eBacon logo only appears in two colors: black and white. The black logo should only appear on a white or very light color background, while the white logo should only appear on the primary blue background or black.

Only the pig should appear in square formatted spaces with limited space (such as social media profile pics).

#### **TAG**

On white backgrounds, the TAG logo should be the primary blue color, while the white logo, similar to eBacon, should only appear on the primary blue background or black.

On white background:







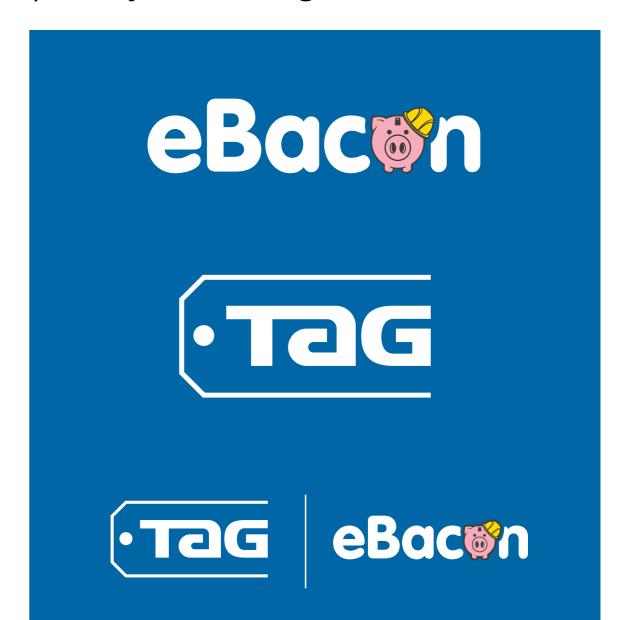


#### Social:





White KO logos should only appear on primary color background:





## **Established Primary Color Guideline**

Documented color codes for different primary color uses

# **Primary Color**

## **Digital**

R 0G 102B 166

Hex: #0066a6

#### Print

C 99

**√** 48

Y 1

( 14

Pantone: 2384 C

## Different shades from primary blue

R 22	R 37	R 47	R 53	R 88
G 55	G 94	G 117	G 133	G 169
B 90	B 153	B 192	B 217	B 255
#16375a	#255e99	#2f75c0	#3585d9	#58a9ff

# Gradient Color for co-branded materials

#### **Gradient:**

Combination of Primary

Blue: 0, 102, 166 Location: 57%

&

Helper Blue: 84, 177, 220

Location: 0%

Gradient Slider: Location 13%

90 Degree Angle

## **Complimentary Colors**

Laid out rules for the use of these colors as well

# **Complimentary Colors**

## **CTA Orange**

Use for buttons for requests for demos on websites



R	255		
G	110		
В	11		
#ff6e0b			

Y 100 K 0

#### **Bacon Green**

Use for formatting lines



R	59		
G	178		
В	115		
#3BB273			

K 0

### **Callout Headlines**

Use for headlines you want to draw attention to



218	
129	
84	
a8154	
	129 84

## **eBacon Black**

For eBacon black logo and body copy



R	62	C	68.3
G	62	M	61.62
В	63	Υ	59.22
#3	e3e3f	K	48.01

## Typography

Replaced Roboto Slab with Open Sans Bold and Raleway with Open Sans

## **Typography**

Headlines & Body Copy

#### **Opens Sans Bold**

Open Sans Bold is used for all headlines and subheads in digital products, printable marketing materials, marketing websites, and social media imagery.

Opens Sans Regular

Use for body copy throughout printed and digital marketing materials. Also used for blog and description copy on websites and digital products.

# Open Sans Bold ABCDEFGHIJKLMN OPQRSTUVWXYZ

## abcdefghijklmn opqrstuvwxyz 0123456789

Opens Sans Regular

ABCDEFGHIJKLMN OPQRSTUVWXYZ

abcdefghijklmnopqrstuvwxyz

0123456789

Print font sizes:

H1 24 - 28 pt

H2 13 pt

H3 12 pt

H4 11 pt

Body 11 pt

Digital font sizes:

H1 50 - 60 px

H2 34 px

H3 18 px

Body 16 px

**CSS for websites:** 

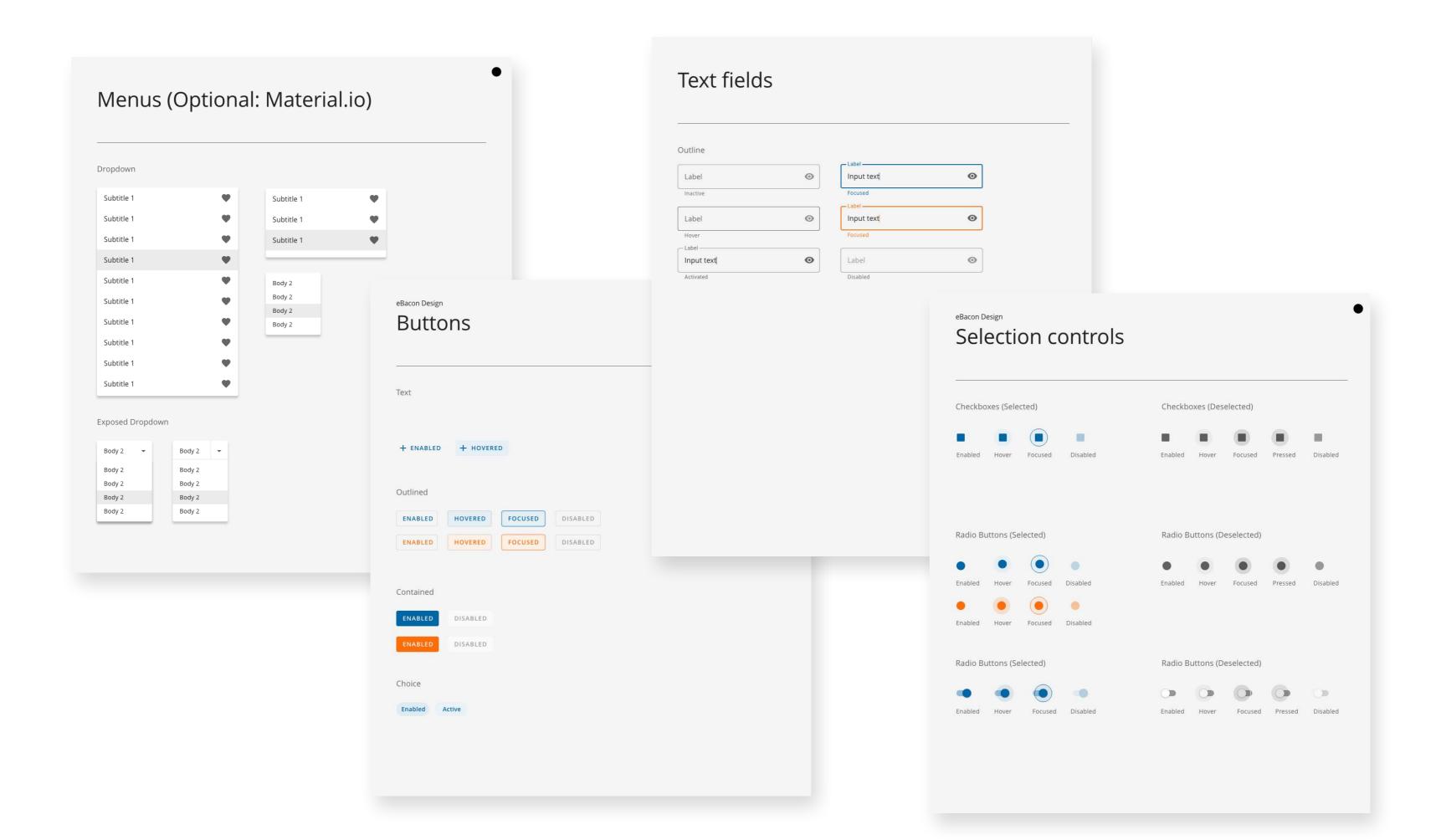
font-family: open-sans, sans-serif;

HL/Sub: bold;

Body: font-weight: 500;

## **UI Kit for Digital Products**

Integrated TAG/eBacon branding into Material Design UI Kit



## **Product Interfaces**

Used new UI kit to develop certain features in TAG's 401k system

























## 401(k) Loan Calculator

\$500,000

Your Balance

\$ 30,000.44

5/13/2020

## Repayment Options

Timeframe to Pay Loan ————————————————————————————————————	Time Period	1   %	Payment Frequency
	Months		Monthly
	Weeks	CALCULATE	Weekly
	Years	CALCOD WE	Biweekly
			—— Semimonthly —
What You'll Owe with Interest	Your Pa	nyments	Repayment Timeframe

DOWNLOAD DETAILS

This form is for example purposes only. Please contact your plan administrator for accurate details regarding a loan.

























## 401(k) Loan Calculator

\$500,000

Your Balance

 5/13/2020

CALCULATE

## Repayment Options

12	Months	~	15 %	Monthly	,

CLEAR

What You'll Owe with Interest

\$31,911.88

Your Payments

\$5,000.93

per month

DOWNLOAD DETAILS

Repayment Timeframe

7/18/2020 - 7/18/2021

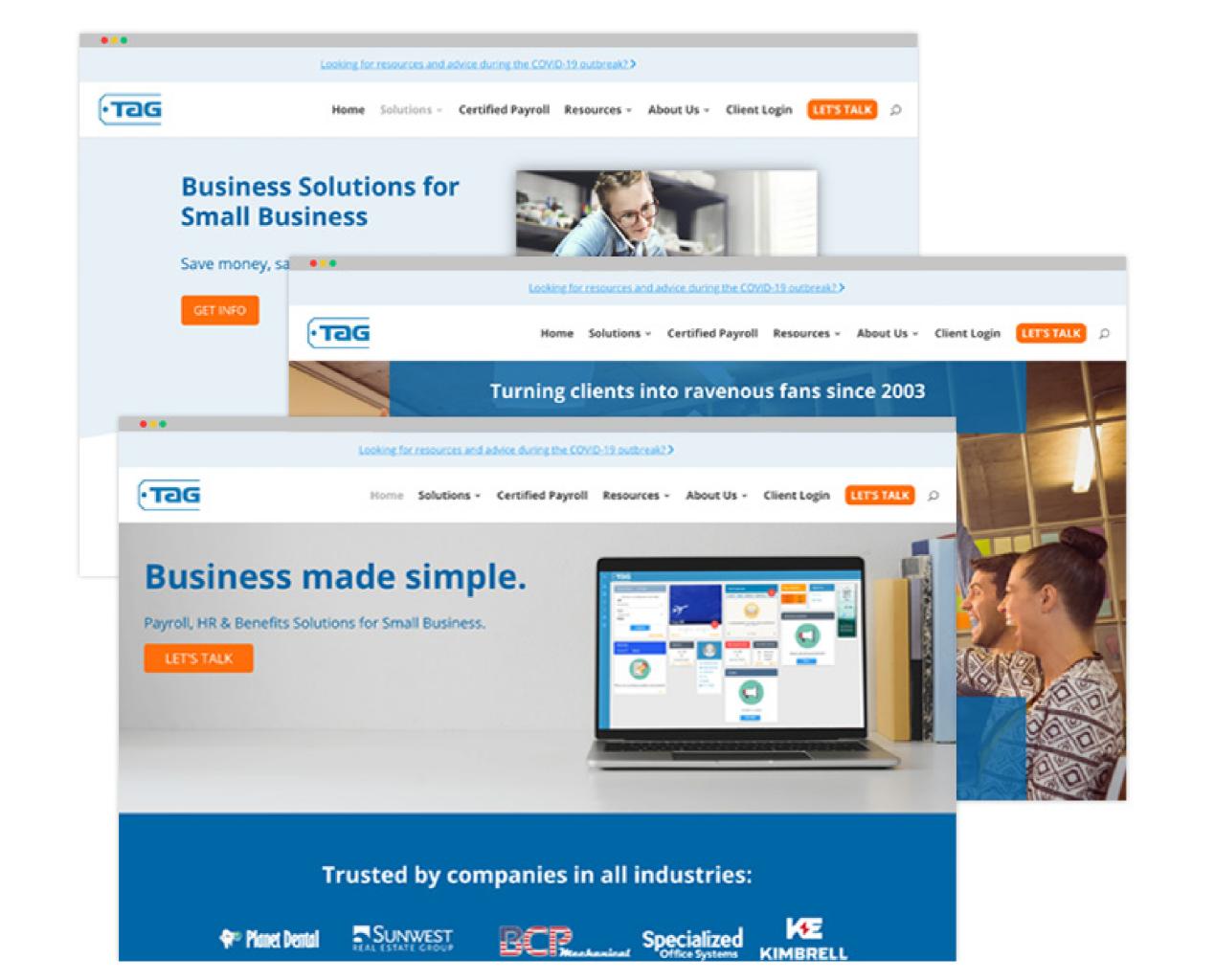
This form is for example purposes only. Please contact your plan administrator for accurate details regarding a loan.

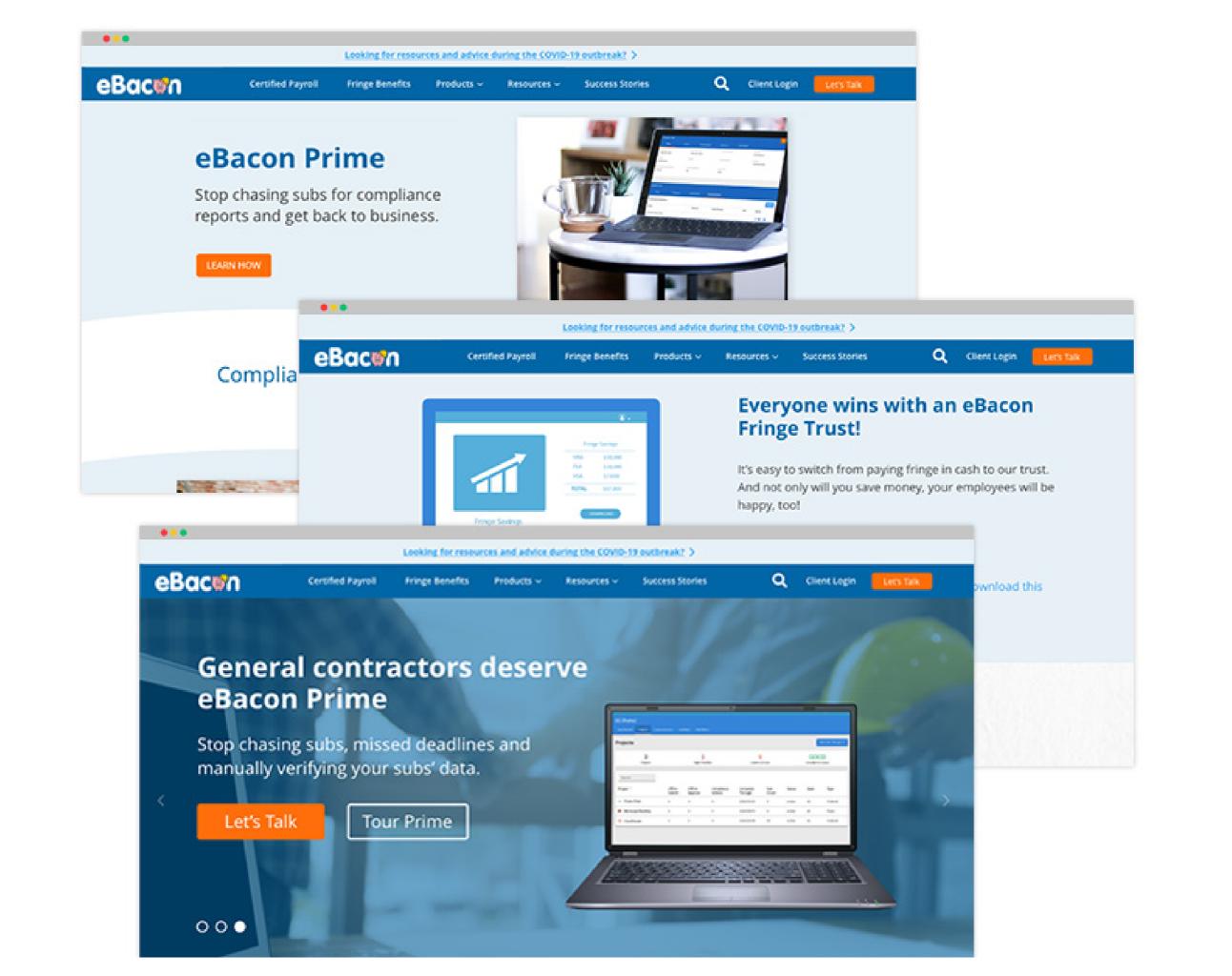
## **Implementation**

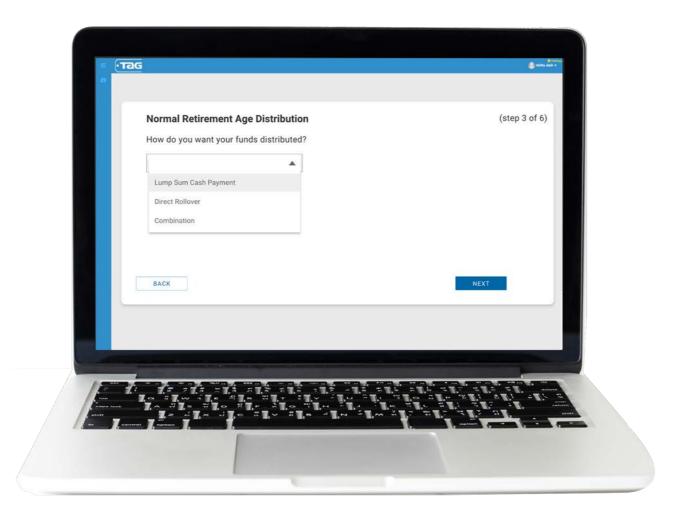
Before I left TAG, the development team created a Storybook component library based off of the brand guidelines and design system I created

## **Implementation**

I also used this design system when I redesigned the TAG and eBacon marketing websites



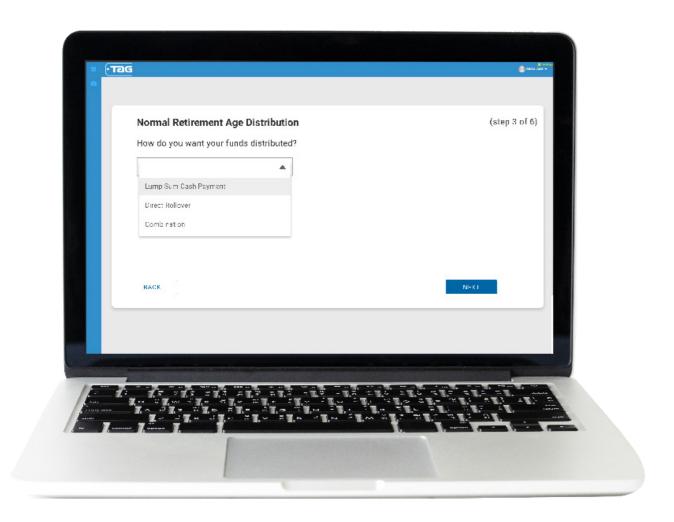






## **401k Distributions**

Roles: UX Research & UI Design





**401k Distributions** 

#### **Problem:**

Users enrolled through TAG's 401k system needed to manually fill out PDF forms in order to transfer funds from their account. This system took up an enormous amount of time for our 401k department.

## **Challenge:**

There were various forms for different types of withdrawals or transfers.

## My role:

I created the workflow and user interfaces based on meetings with the 401k team.

#### Where I started

I dug through all the different forms and drew out different user flows to see where the forms had similarities.

dress		
у	State	Zip
one	5	
ction 2: Amount		
Total	Amount Available	☐ \$
	and Daymont	11.
Option 1 Lump Sum Ca deral Tax Withholding I request I apply on the taxable portion of a distribution, in addition to ordi	t this distribution be paid frmy benefit. I may be it	id directly to r able for a 10%
Increase withholding to	% (may not b	e lower than 2
ite Tax Withholding I understand		
If my state mandates a higher		W
TAG will withhold the higher a	amount.	
If my state does not require in If state tax withholding is not a		
Do NOT withhold state to		
Withhold state taxes at t		
Option 2 Direct Rollov		
equest a direct rollover of this did to be withheld. *If your account a IRA Account / Plan Name	includes a Rath halance	, be sure that
INA Account / Plan Name		
Traditional Account Numb	K.00	
Other: Roth Account Number (if applicable) iicable) Address, City, State, Zip Make check payable to		
de 401(a)(31)(D). providing false or n fee of \$75 from te IRS Form W-9		
n. This request is true and accurate		

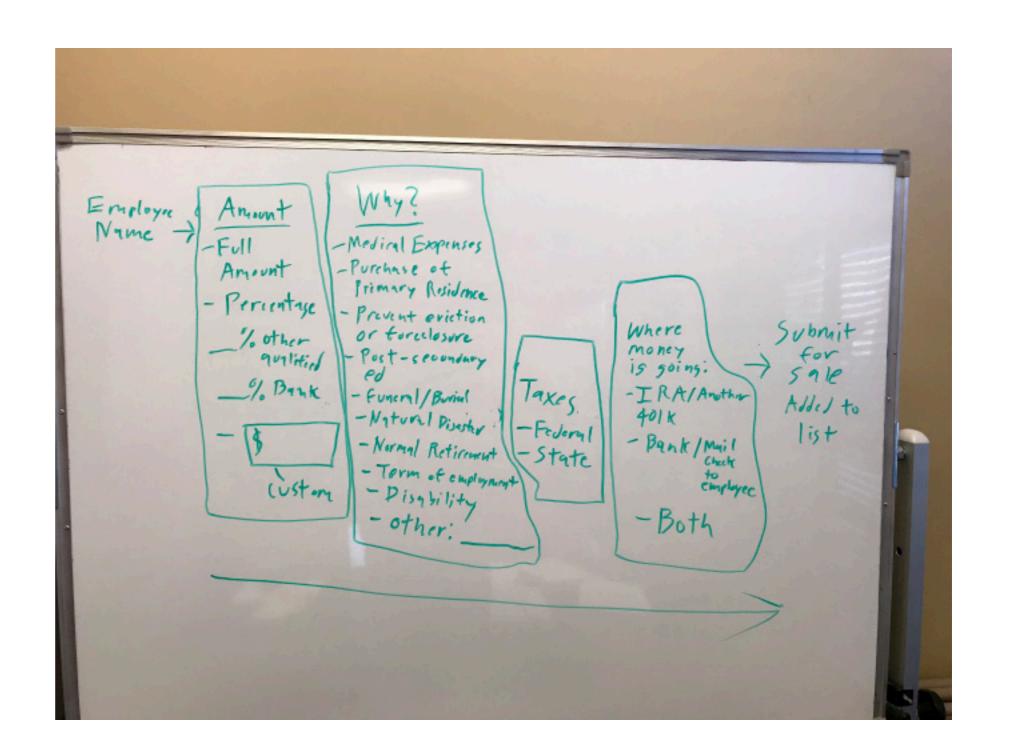
#### In-service/Partial Distribution Request Form (continued)

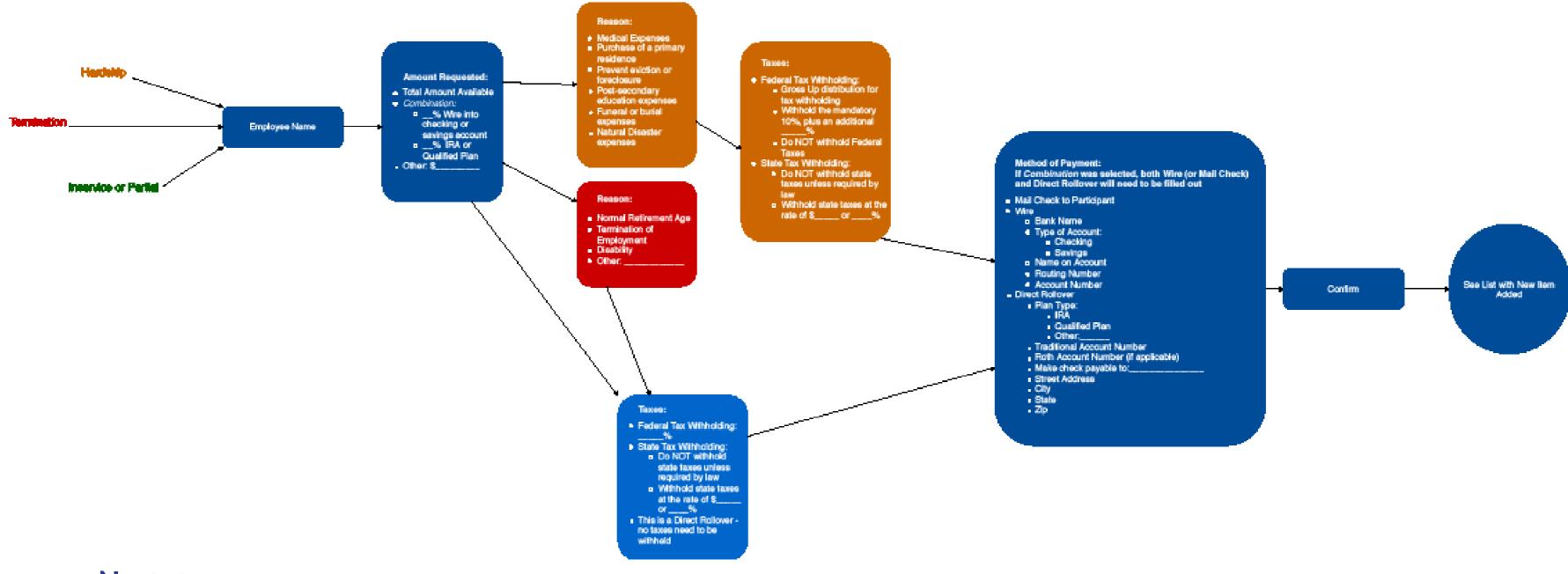
a Direct Rollover. I understand the portion • Tag In-service/Partial Distribution Request Form ncome withholding based on my state of Review your plan's SPD to determine if 1) your plan allows in-service or partial distributions and 2) if you meet the requirements. READ THE ATTACHED SPECIAL TAX NOTICE REGARDING PLAN DISTRIBUTIONS, we or state income withholding. Distribute my the Direct Rollover Account listed below Participant Name ion Request Form (continued) **Hardship Distribution Request Form** ·Tag READ THE ATTACHED SPECIAL TAX NOTICE REGARDING PLAN DISTRIBUTIONS. We recommend you you have any questions regarding the tan implications of your request. This Form Must Be Completed And Signed By You And The Plan Sponsor, if any information is missing or incomplete, you may be required to complete a new form or provide additional information before the ions and agree to the terms and conditions relating te that I consent to the liquidation and payment of processed. I certify that the above information is sponsor will rely on this information in making the isleading information on this form may constitute tion fee(s) from the proceeds of my distribution. I s defined in the IRS Form W-9 instructions). Purchase of a primary residence ereby authorize TAG Employer Services to process Prevent eviction or foreclosure with plan provisions. I have verified Sections 1-3 of If the amount you are requesting is greater than the amount available for a Hardship Distribution on the date your request is processed, TAG will process for the maximum amount evailable to you under the terms of the Plan. Federal Tax Withholding Upon account of hardship, this distribution is subject to voluntary federal income tax withholding. If you do not make an election below, 10% federal income taxes will be taken from the taxable portion of your distribution. If federal income taxes are not withheld, you are liable for payment of federal income tax on your distribution. Please note that you may also be subject to tax penalties under the estimated tax payment rules if your payments of estimated tax and withholding, if any, are not adequate. Gross Up distribution for tax withholding. Check this box if you wish to increase the amount processed from your account for federal (and state if applicable) tax withholding. This option is available if you have sufficient funds in Withhold the mandatory 10%, plus an additional \_\_\_\_\_\_% Do NOT withhold Federal taxes State Tax Withholding Lunderstand that applicable state income tax will be withhold from my payment based on my state . If my state mandates a higher amount of income tax withholding than I elect below, leven if I elect no income tax withholding), TAG will withhold the higher amount. . If my state does not require income tax withholding, TAG will not withhold any state income tax unless I specify an . If state tax withholding is not available in my state, TAG will not withhold state income tax even if I elected withholding. Withhold state taxes at the rate of \$ \_\_\_\_\_\_or \_\_\_\_\_% ☐ Do NOT withhold state taxes unless required Revised 1/31/2017

## Breaking down the complexity

The different requests for withdrawals/ transfers broke down to:

- 1. Amount being requested
- 2. Why the funds were being requested
- 3. How users wanted to pay taxes for withdrawals (transfers exempt)
- 4. Where the money is going

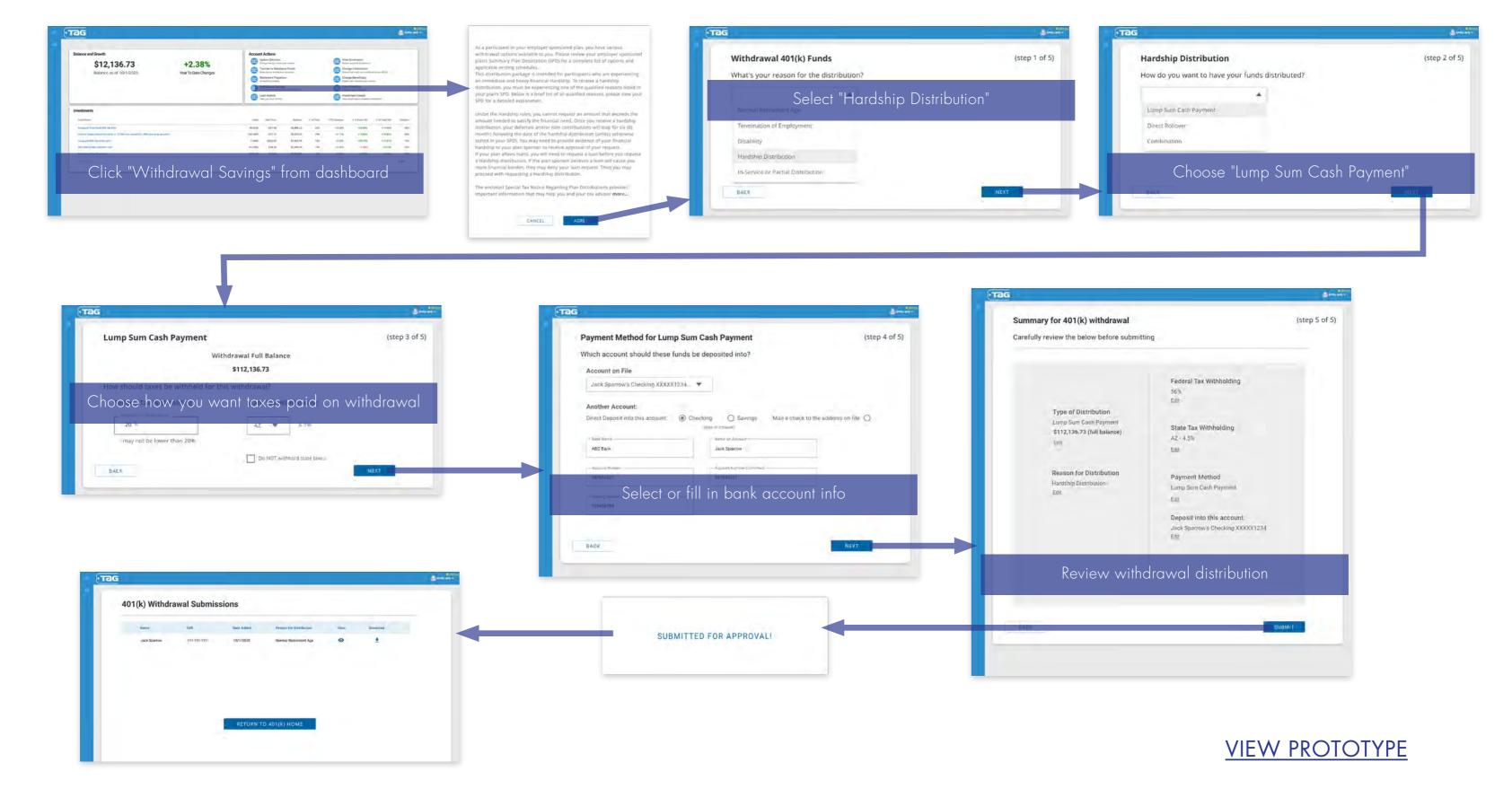




## Next steps...

I went through the different user flows with the development and 401k team, revised based on their feedback, then began designing the user interfaces for the different user flows.

The user flows outlined above account for: Normal Retirement Age, Termination of Employment, Disability, Hardship Distribution, and In-Service or Partial Distributions.



User flow example for a lump sum cash payment for a hardship distribution that would be directly deposited into a checking account.

## Where this project was left off...

Before I left TAG, the development team was able to launch the transfer/withdrawal capability for our internal 401k team to use. This feature was scheduled to be accessible to our external customers in December 2020.



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