
Designs by Aradia C

A Sampling Of:

- UX Strategy
- User Research
- Information Architecture
- UX Design
- Service Design

IA | UX | Research



1 E2E Product & Design Strategy for an Education Finance Startup

ROAD2COLLEGE

Project Value & Impact

The “game” of identifying, applying to, and getting into college today is an intense and stressful one. Parents & students are largely at the mercy of many institutions, and lack the data needed to make the best decisions and know whether they’re getting a fair deal.

The CEO of Road2College experienced this herself and decided to do something disruptive to address this. She found a way to scrape data from multiple websites & databases, and used that to build a monster spreadsheet boasting a wealth of information needed to figure out which school was best. We went on to digitize this, and also build a crowdsourcing tool to help users compare their college financial aid offers to those of others.

All this put the power in the hands of students & their parents—where it should have been all along. My work on the project helped dramatically increase user base and therefore revenue for the company.

Project Description

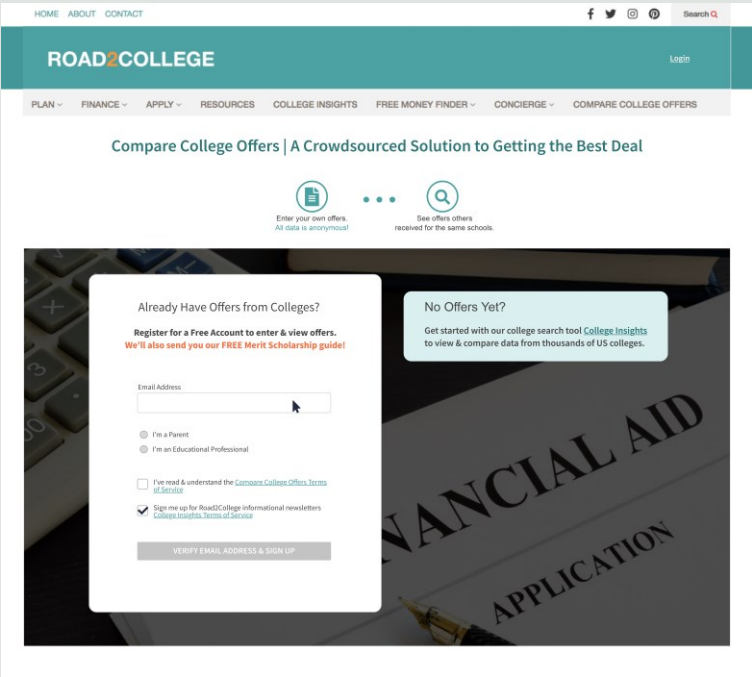
The CEO of Road2College wanted to overhaul & modernize her marketing content site, improve her digitized version of her spreadsheet, and get the College Offer Comparison tool built.

Project Scope

- Rearchitect the marketing site
- Redesign College Search tool
- Design v1 of Compare College Offers

Contributions

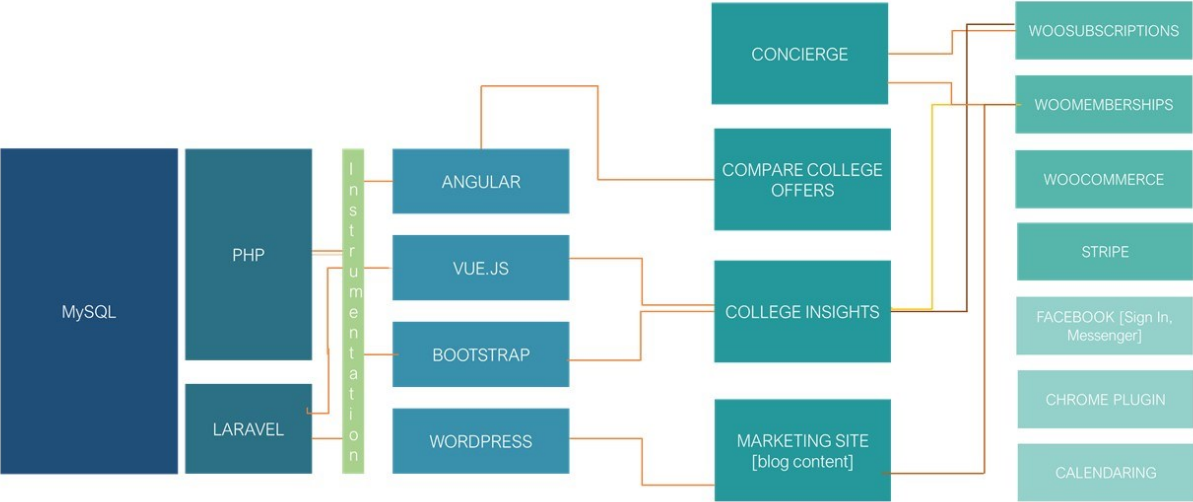
- As sole Design Consultant, I:
- Conducted user research & competitive analysis
 - Performed functionality & content analysis to dedupe and inform new IA
 - Created new, streamlined IA that significantly reduced site size
 - Redesigned College Insights and designed Compare College Offers
 - Partnered with CEO on Product Strategy & Roadmap
 - Created user flows requirements docs, research docs, wireframes, and functional specs
 - Managed Agile Development for multiple distributed development teams
 - Partnered with Software Architects to rearchitect the site & apps



College Insights by Road2College									
Premium Filters									
College Name	Public/Private	Region	State	SAT/ACT Required	Average SAT	SAT 10th Percentile	Full-time Undergrads (UG)	UG Women	UG Men
University of Maryland, College Park	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%
<UNIVERSITY NAME>	Public	Midwest	MD	—	1385	—	47,253	66%	34%

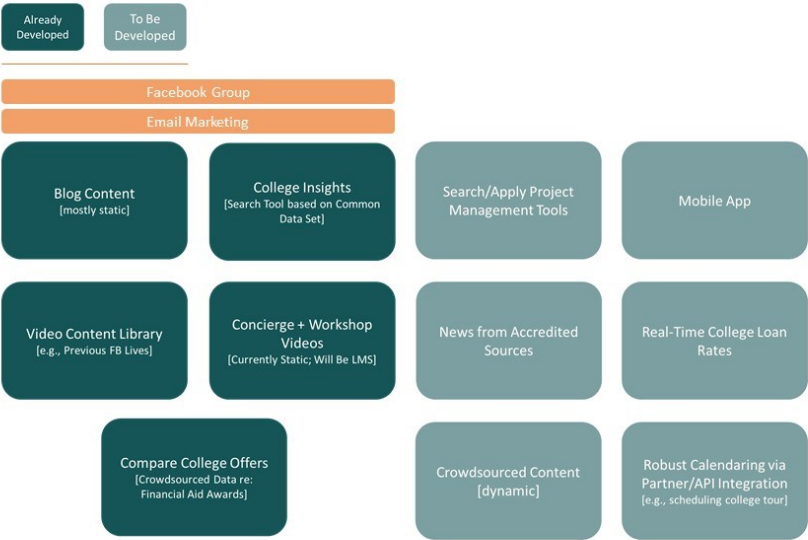
WEBSITE & SYSTEM ARCHITECTURE

COMPONENT DIAGRAM



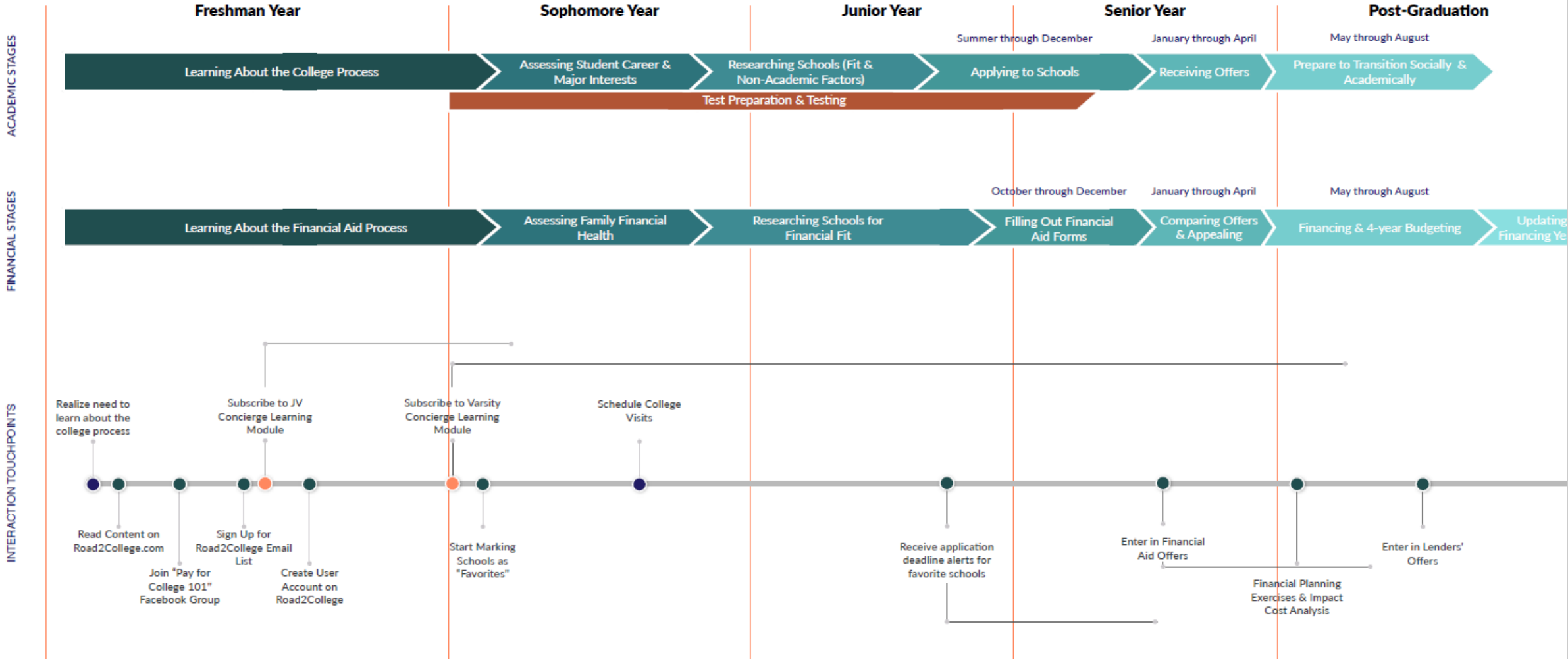
*Pale green elements don't exist yet

ECOSYSTEM

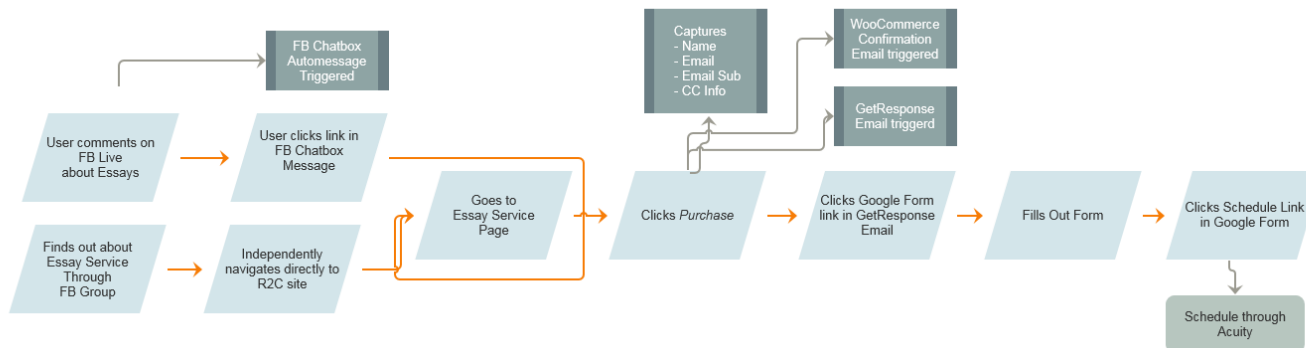
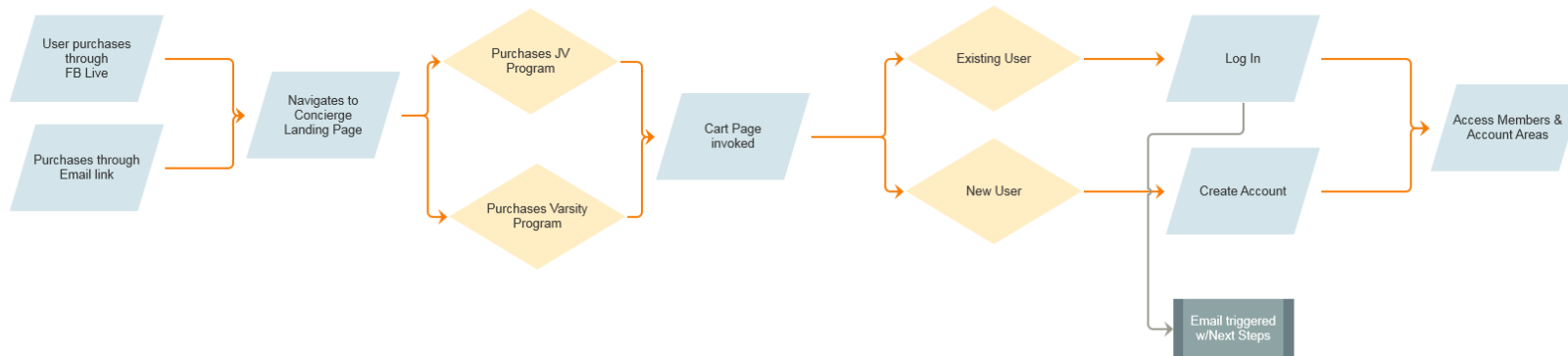
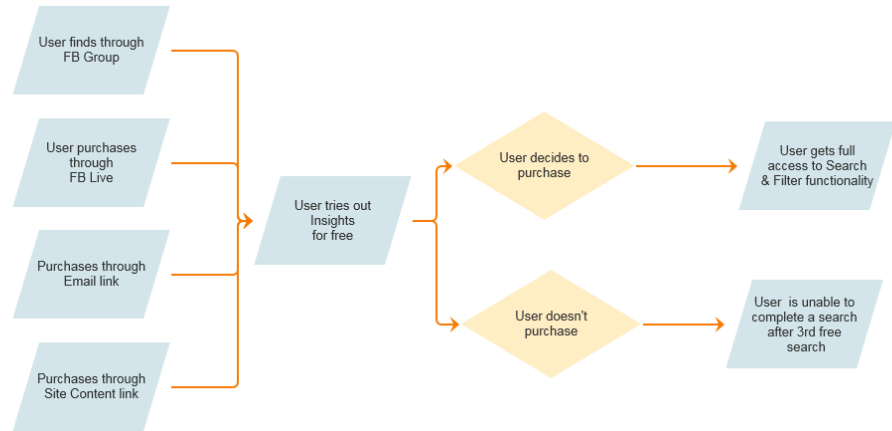


CUSTOMER JOURNEY MAP

ROAD2COLLEGE FAMILY: THE OVERALL JOURNEY TO FINDING THE BEST FIT BASED ON FINANCIAL NEED & MERIT SCHOLARSHIP AVAILABILITY:



USER FLOWS



After mapping out the full customer journey, I captured the existing ways in which users could land on the College Insights Web App.

RESEARCH & ANALYSIS

- I leveraged the CEO's very large Facebook Group to recruit survey, interview & usability participants
- Conducted all research activities; synthesized & presented findings to CEO & her small team
- Went through several rounds of testing the existing web app, redesigning, testing, iterating & retesting

4

In-depth
Surveys

12

Existing & Potential
Customer
Interviews

6

Moderated
Usability Studies
On New Design

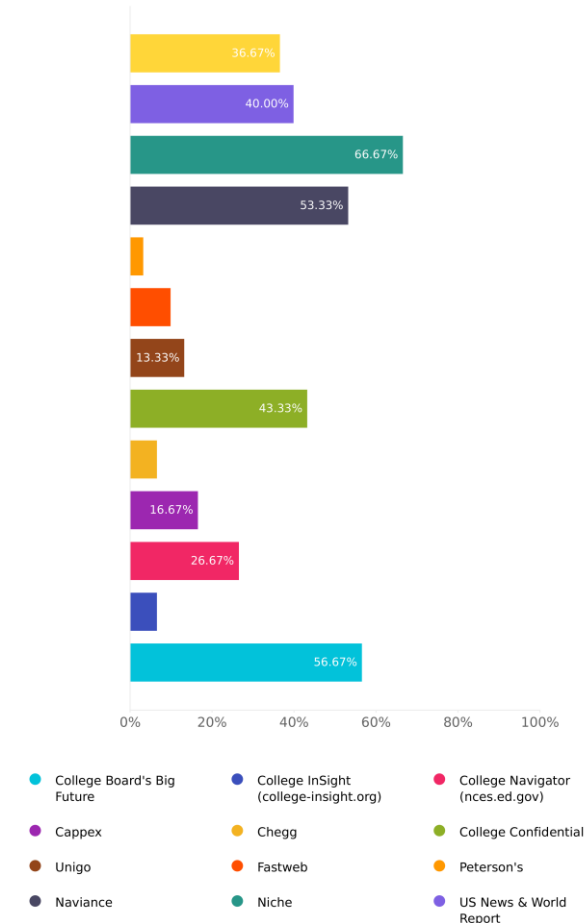
Choices	Response percent	Response count
College Board's Big Future	56.67%	17
College InSight (college-insight.org)	6.67%	2
College Navigator (nces.ed.gov)	26.67%	8
Cappex	16.67%	5
Chegg	6.67%	2
College Confidential	43.33%	13
Unigo	13.33%	4
Fastweb	10.00%	3
Peterson's	3.33%	1
Naviance	53.33%	16
Niche	66.67%	20
US News & World Report	40.00%	12
Other (Please describe)	36.67%	11

Other (Please describe)

1. <https://datausa.io/>
2. we have been looking at schools that will give her lots of merit aid that are reputable
3. [Collegedata](#)
4. [scoir](#)
5. [Common data set, sites with student reviews of academics and school culture](#)
6. lots of 'googling'
7. [College counselor program](#)
8. [SCOIR](#)
9. [college greenlight](#)
10. [College Vine. Tuition tracker.](#)
11. [Fiske](#)

Outside of Road2College, which online resources are you using in your college search?

Answered: 30 Skipped: 1



College Insights

by Road2College

Register for Full Access

Login

FAQ

Search Colleges

reset filters

Search for a Specific School(s)

Enter School Name

SEARCH

OR

Search by Preferences

Major

Select all the academic programs of interest.

Aero

Location

Select locations by geographic region or state.

Search locations

School size

Slide to find colleges by number of students enrolled.

Smallest

Medium

Largest

Test scores

Which Test do you want to include?

None

SAT

ACT

Search to find schools that match your needs.

All

Test Optional

Merit Scholarships

Need-Based Aid

Early Decision

My Favorites

College Name

Public/Private

Region

State

SAT/ACT Required?

Average SAT

SAT 75th Percentile

Full-time Undergrads (UG)

Design Rationale:

23C students have been asked to design a website that the CEO of a business will use to

- R2C started out as a massive spreadsheet that the CEO shared via email with her Newsletter subscribers
- The Web App v1 went out as essentially a digital version of that same spreadsheet, and was riddled with usability issues
- I devised a way for users to pare down what data showed up for them, and enabled them to search based on the desired fit that students & parents sought in a school
- The search results still required a more tabular view—at least to start—and was designed to make it easy for users to scan and decide which school details they wanted to dig into

[illegible]

COMPARE COLLEGE OFFERS

HOME ABOUT CONTACT f t i p Search Q

ROAD2COLLEGE Login

PLAN FINANCE APPLY RESOURCES COLLEGE INSIGHTS FREE MONEY FINDER CONCIERGE COMPARE COLLEGE OFFERS

Compare College Offers | A Crowdsourced Solution to Getting the Best Deal

Your Student

Student's State of Residence*
New York

EFEC*
30,001-40,000

Unweighted GPA* SAT ACT
3.8 1583

Submit

HOME ABOUT CONTACT f t i p Search Q

ROAD2COLLEGE Login

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Compare College Offers | A Crowdsourced Solution to Getting the Best Deal

Your Student

Student's State of Residence*
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EFEC*
30,001-40,000

Unweighted GPA* SAT ACT
3.8 1583

The College

College
Cornell University

Admission Type
Early Decision

☐ This college is Test Optional

Add Another School Submit

HOME ABOUT CONTACT f t i p Search Q

ROAD2COLLEGE Login

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EFEC*
30,001-40,000

Unweighted GPA* SAT ACT
3.8 1583

The College

College
Cornell University

Admission Type
Early Decision

☐ This college is Test Optional

Offer Details

Grants & Scholarships (Money You Don't Pay Back)

Institutional Aid

Total Grants & Scholarships based on Financial Need
\$0

☐ Yes, it's renewable. (I expect to get this every year.)

Total Grants & Scholarships "NOT" based on Financial Need
\$0

☐ Yes, it's renewable. (I expect to get this every year.)

Governmental Aid

Total Pell & State Grants
\$0

Private Scholarships

Total Private Scholarships
\$0

Federal Loans (Money You Pay Back)

Total Subsidized Federal Loans
\$0

Total Unsubsidized Federal Loans
\$0

Work Study Programs

Total Subsidized Federal Loans
\$0

Add Another School Submit

Compare College Offers enables college hopefuls & their parents to enter data re: their financial aid offers. It's 2 sided – it crowdsources comparative data, and displays that crowdsourced data through the Insights app.

ACCOUNT CREATION EXPLORATIONS

[HOME](#) [ABOUT](#) [CONTACT](#)

[f](#) [t](#) [i](#) [p](#)

Search

ROAD2COLLEGE

Login

PLAN

FINANCE

APPLY

RESOURCES

COLLEGE INSIGHTS

FREE MONEY FINDER

CONCIERGE

COMPARE COLLEGE OFFERS

Compare College Offers | A Crowdsourced Solution to Getting the Best Deal


Enter your own offers.
All data is anonymous!




See offers others
received for the same schools.

Already Have Offers from Colleges?

Register for a Free Account to enter & view offers.
We'll also send you our FREE Merit Scholarship guide!

Email Address

☐ I'm a Parent

☐ I'm an Educational Professional

☐ I've read & understand the [Compare College Offers Terms of Service](#)

☒ Sign me up for Road2College informational newsletters
[College Insights Terms of Service](#)

VERIFY EMAIL ADDRESS & SIGN UP

No Offers Yet?

Get started with our college search tool [College Insights](#) to view & compare data from thousands of US colleges.

Join Us

Become Part of the Road2College Community & Become a Savvy...

 Invitations to our Facebook Live Sessions

 Newsletters that provide deep insights into...

 Quickly narrow down your search using pre-filtered lists

 Favorite and save colleges you are most interested in

 Receive automatic access to updated data (for up to 1 year)

NEVER MIND

Sign Up

First Name

Last Name

Email Address

Student's State of Residence

High School Graduation

☒ I'm a Parent (I want to enter my offer(s) & compare to others)

☐ I'm an Educational Professional (I want analytics & insights)

☐ I have multiple students

SIGN ME UP

FEATURE & FUNCTIONAL SPEC SAMPLES

FACET	FEATURE AREA	REQUIREMENTS	PRIORITY
PRODUCTS		Subscriptions & one-time purchases can be bundled	1
		Purchasing or Subscribing involves Account Creation flow	1
USER ACCESS	ACCOUNT/USER PROFILE	Users can register for an account	1
		Users can login to their account	1
		Users can add payment information to their account/profile	1
		Users can edit payment information in their account/profile	1
		Users can make a one-time purchase	1
		Users can subscribe to products	1
		Users can be members of services (e.g., Concourse)	1
		Users can see purchase/subscription history in one place	2
		Users can access any purchase-related content through their Profile (Concourse content, videos, ...)	1
		Users can change their email address	1
		Users can sign up for Family Account	3
		Users can add/remove people to/from Family Accounts	3
		Users can change their password through their profile	1
		Users can reset their password (via Login/Forget Password flow)	1
		Users can change their answers to all Onboarding Questions	2
		Users can subscribe to R2C email newsletters	1
		Users can unsubscribe from newsletters	1
		Users can subscribe to a range of notifications (live events, facebook live)	2
	ONBOARDING (Account & Insights Config)	Users can like/unlike to Facebook Page	2
		Users can sign up for Facebook Messenger notifications	3
		Users can manage all their notifications through their account	1
		Users can designate Owner for Family Accounts	3
		Users can invite other people via email, Facebook or text	2
		Users can share R2C Content via social media, Facebook Messenger, email or text	-2
		Graduation Year	-1
		Any purchase of anything should initiate the Account Creation Process	-2
		What their parents are	-2
		Whether high school or college	-2
	INSIGHTS STABILIZATION & IMPROVEMENT	Interests (sports, military, performing arts)	-2
		Users need robust onboarding	-2
		Looking for money (scholarships, need-based aid)	-3
		Automatic Table configuration/customization based on onboarding	2
		User customization of Table	3
		Chunking Columns into Sections	3
		Users can Rank Favorites	3
		Users can Order/Rearrange Favorites list	3
		Users Add comments to Favres	3
		Users can create a Task List	3
TOOLS	FAVORITES LIST [in USER PROFILE]	Milestones & Deadlines Tracker	3
		College Tour Notetaker	3
		Users can Share/View College Notes	3
		Average Accepted Student Profile	3
		Chrome Plugin to add College to Favres from individual College Site	3
		Provide Recommended Classifications for selected/Viewed	3
		Recommended Schools	3
		Users can upload images and video of colleges	4
		Users can create a To-Do List	4
	PROJECT MGMT & TASK TRACKING	College Deadline Alerts	4
		College Event Alerts	4
	COMPARE COLLEGE OFFERS	Clean up fields & required answers	1
		Tighten up/improve table	2
		Add question re: who gave a Scholarship	2
		Change from Collapsible sections to step-by-step form	2
		Student View of College Offers info	2
		*Add Academic Year field	1

FEATURE REQUIREMENTS: Integrating Compare College Offers Data into College Insights

INTRODUCTION

Compare College Insights is a crowdsourcing tool that enables users to enter financial aid & loan offers they've received from various institutions. In order to provide further value to Road2College customers who pay for College Insights, data entered via Compare College Insights will be integrated into the existing Insights table.

Compare College Insights											
Institution		College Financials (Without Aid Awards)		College Classification/Category (NetCosts)		Admission?		Private/Nonprofit?		Net Cost to You	
School Name	Admission Type	Cost of Attendance	Renewable?	Merit-Based?	Pell & State Grants	Private/Nonprofit?	Renewable?	Net Cost to You	Estimated Future Costs	Undergraduate Financial Costs	Other Costs
Northwestern University	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000
University of California	Early Action	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	Yes	\$15,000	\$15,000

GOALS

- Provide additional value to College Insights customers
- Provide high-level information available in Compare College Offers
- Provide an easy way to get to/view College Insights data for a given institution

NON-GOALS

- To integrate the totality of Compare College Offers data into the College Insights table

HIGH-LEVEL REQUIREMENTS

PRIORITY	REQUIREMENT	COMMENTS
	Add 2 new columns to the College Insights Table	
	Use only the CSV data from Compare College Offers and build new screens for displaying the data (i.e., don't reuse the code from Compare College Offers)	
	Create a modal page for Need-based Offers (displays data for 1 institution)	
	Create a modal page for Merit-based Offers (displays data for 1 institution)	

FEATURE REQUIREMENTS: Integrating Compare College Offers Data into College Insights

DETAILED REQUIREMENTS

College Insights Updates

PRIORITY	REQUIREMENT	COMMENTS
	Add a New Column: <i>Need-Based Offer Data Available</i>	Column Header text TBD
	Add a New Column: <i>Merit-Based Offer Data Available</i>	Column Header text TBD
	Pull in Yes or No answers in Need-Based column for each institution column	
	Pull in Yes or No answers in Merit-Based column for each institution column	
	For YES answers: Show number of offers entered	
	Link to Need-Based offer data via Yes answers in related column	
	Link to Merit-Based offer data via Yes answers in related column	

Need-based Aid Modal

When a user clicks on a "Yes" in the Need-Based Offer Data column in College Insights, a popover will be invoked. This modal will display the relevant detailed data for the related institution pulled from Compare College Offers.

PRIORITY	REQUIREMENT	COMMENTS
	Include Compare College Offers section header	
	Remove college selection dropdown	
	Add Subheader: <i>Cost of Attendance (Without Aid Awards)</i>	This would be pulled from College Insights, not from user-entered data
	Columns to Include: - About this Student - Admission Type - Need-based College Grants/Aid - Renewable - Pell & State Grants - Net Cost	
	Recalculate Net Cost: use new data from College Insights table; not data entered by users into Compare College Offers	

2 BIOLOGISTEX: A BIOTECH STARTUP

BIOLOGISTEX: BIOMATERIALS LOGISTICS

Project Description

Before this startup, there was **no real way to know whether biomaterials were still viable** when they arrived at (example) a hospital after being shipped by the biotech firm. *For example, if someone is waiting for a lung transplant, by the time the hospital receives the organ, it may no longer be viable due to stresses experienced during shipping.*

The company invented & built the shipping box w/extensive tracking & telemetry (the EVO), but had no foundation for how BioTech firm employees, healthcare professionals, or shippers would interface with their product. This is where I came in.

Project Value & Impact

This was literally the very first time that biomass – such as donated organs being sent in a critical situation – could be discerned as either viable or unviable upon arrival at its destination. The revolutionary box that BioLogistex had designed was the first of its kind.

The impact of design here was profound. The interfaces I designed provided users on all sides of the equation to easily interact with shipments, and the telemetry thereof, from inception to delivery.

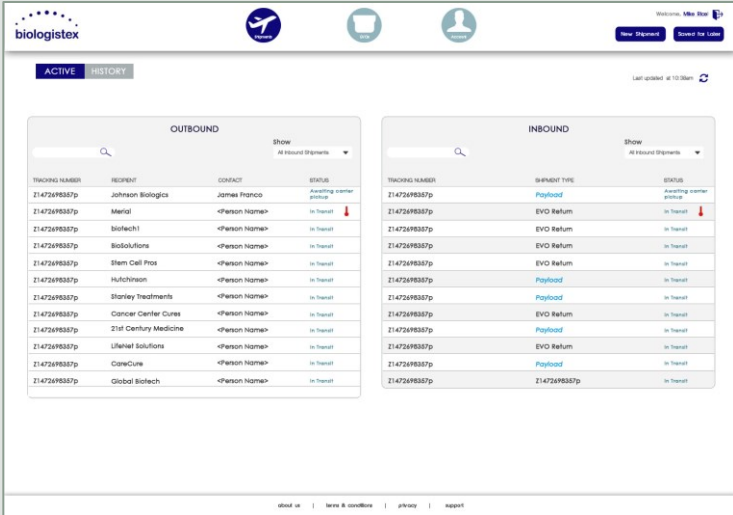
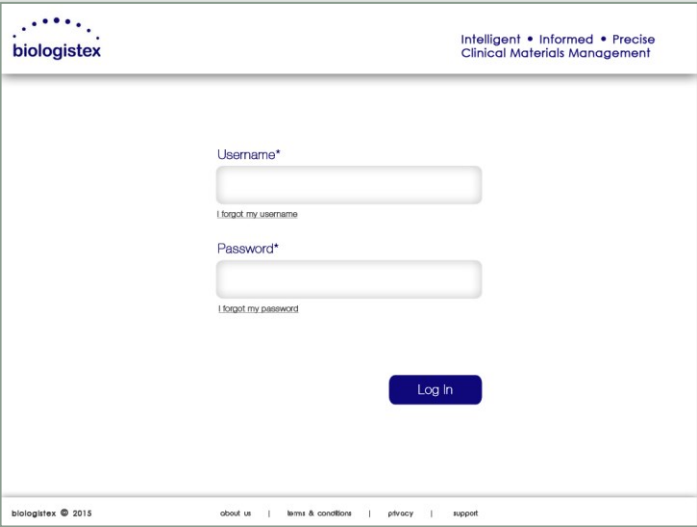
Project Scope

The project scope started out as a simple “reskin” of a site they leveraged from their telemetry partner. It ended up being a full-scale design & development project of a brand new, interactive Web App that enabled multiple highly-differentiated user groups to create, track, and manage biomass shipments.

Role & Contributions

As sole Product & Design Strategy Consultant, I:

- Conducted user research & competitive analysis
- Researched tracking device & existing tracking portal (leveraged from the ankle bracelets worn by house-arrest inmates)
- Provided consultation & leadership on product & design strategy
- Led brainstorming sessions
- Created feature spec, user flows, information architecture, wireframes, branding elements, visual designs, style guide, and functional specs



RESEARCH & ANALYSIS

- Led many analysis sessions with CEO, CTO and COO to understand the business, its goals & trajectory, and help them build their roadmap
- Visited biotech firms to learn how they worked, understand their mental model, and explore how they historically dealt with managing biomass shipments & identify their needs
- Interviewed relevant healthcare providers (e.g., surgeons) and their staff, to understand what the recipient experience was and identify their needs

2

Weeks of Initial
Due Diligence
Business Analysis

2

Weeks of Intensive
Design-Led
Product Strategy
Planning

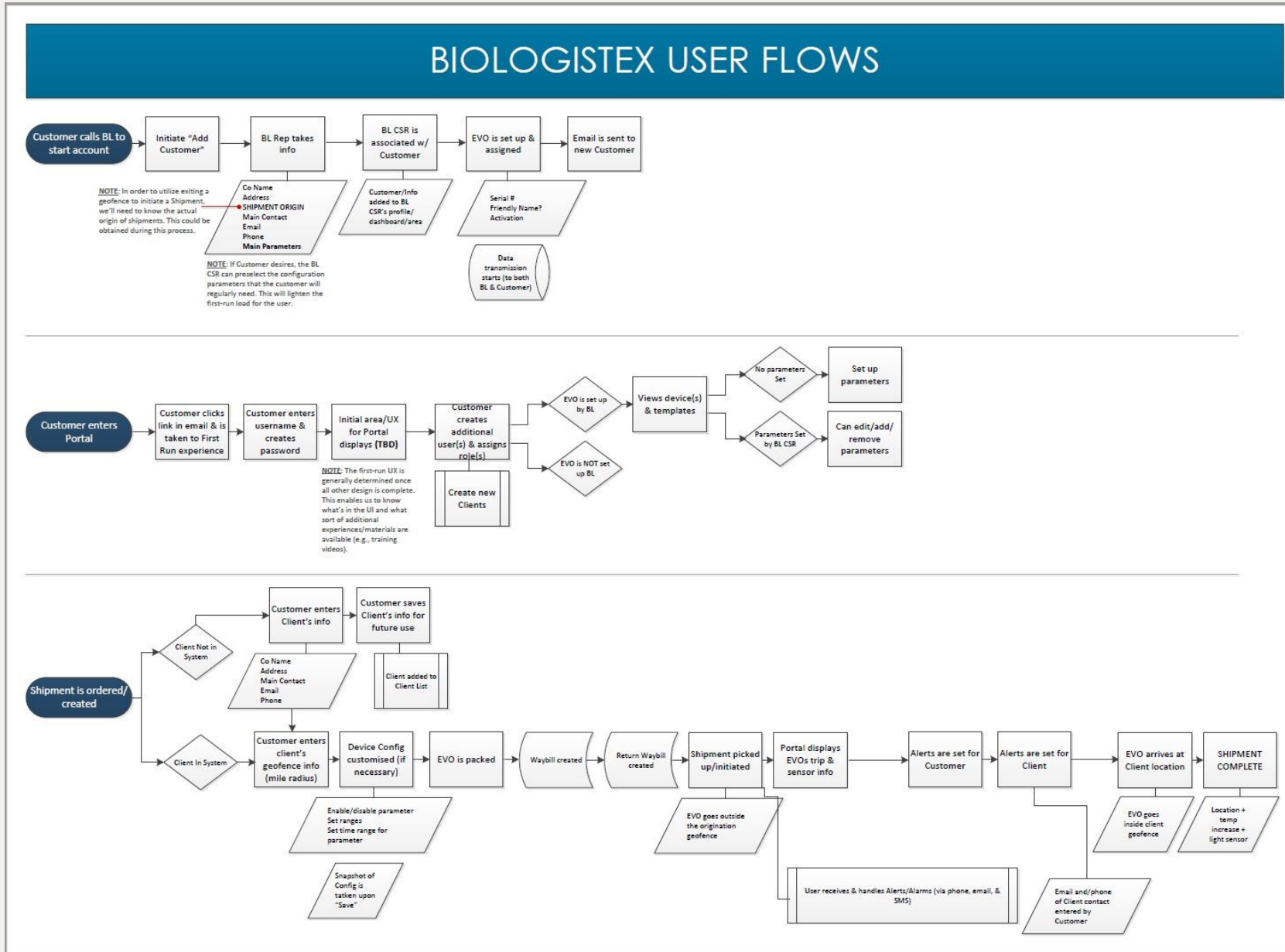
4

BioTech Firms
Visited &
Several Employees
Shadowed

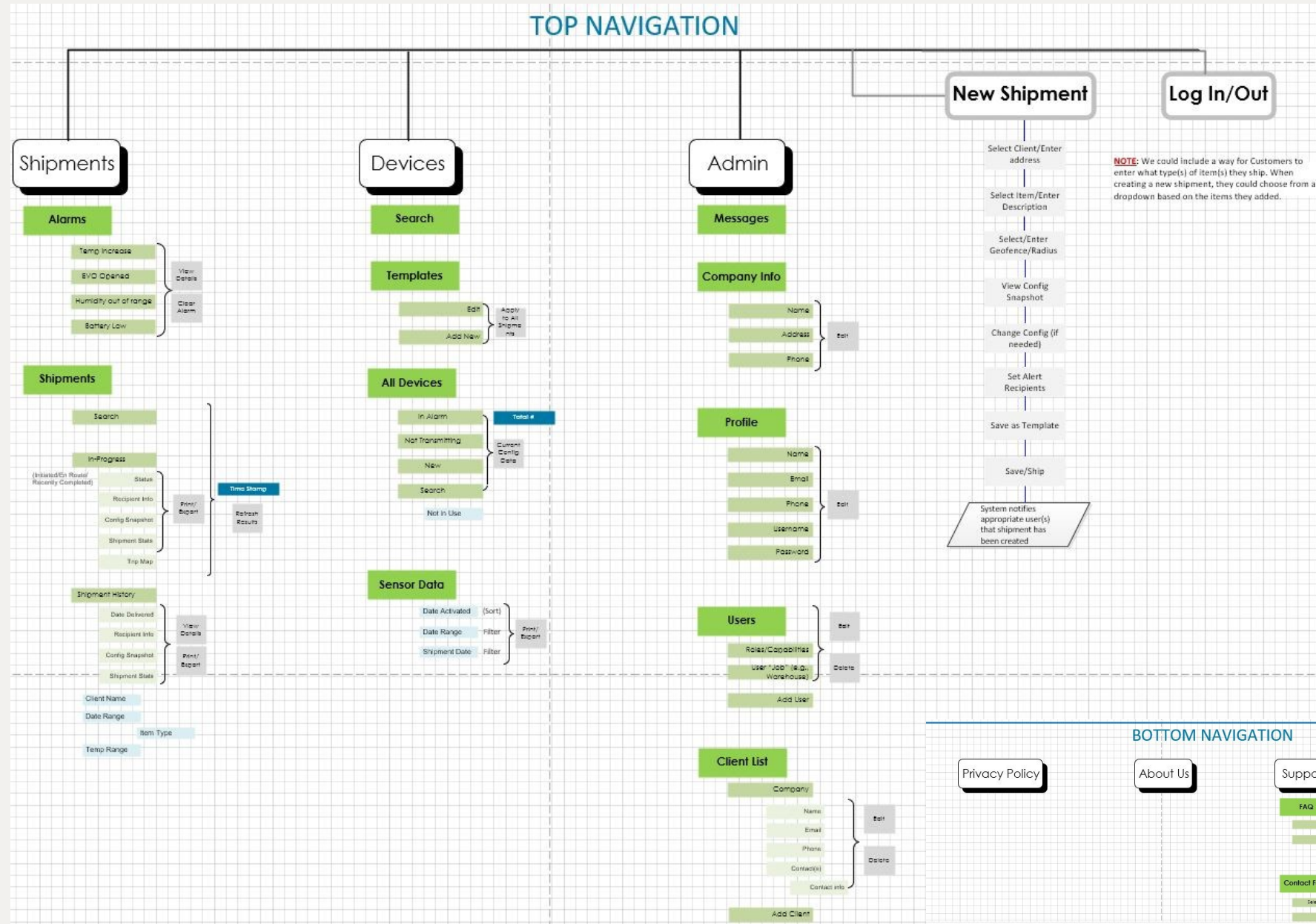
8

Research Calls
with Relevant
Healthcare
Professionals

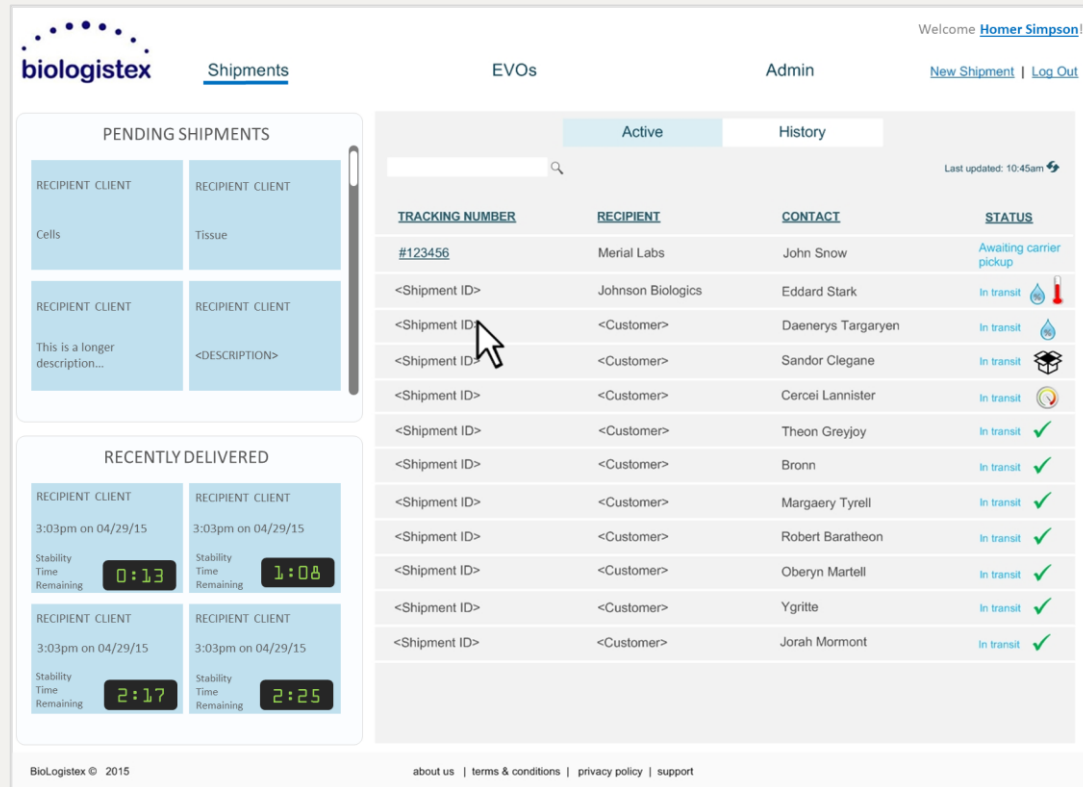
USER FLOWS



INFORMATION ARCHITECTURE



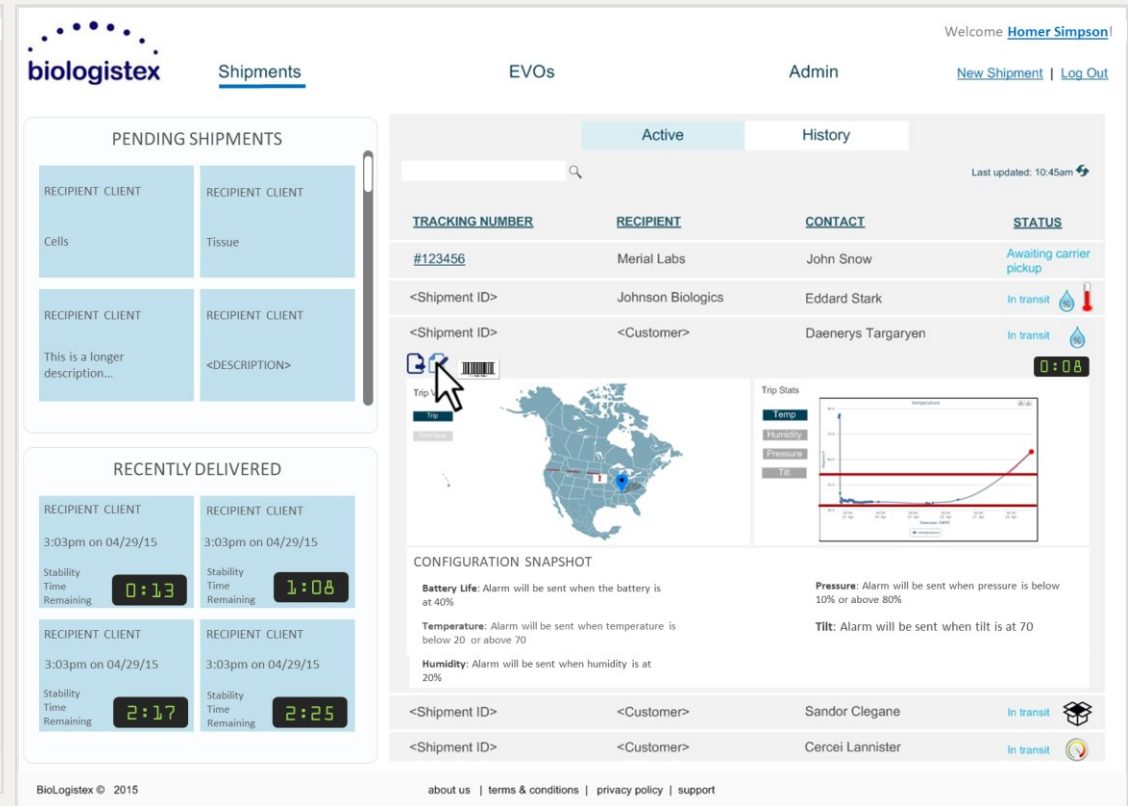
WIREFRAMES: Shipment Tracking Dashboard



Clicking on a shipment will expand the row to display Shipment Details.

Design Rationale:

- I sat with some logistics employees at biotech firms to learn how they do their jobs & what their pain points are
 - They're largely using FedEx & UPS or similar, and tracking is disjointed
 - They need to know what's in transit, if there's an issue with a shipment, to see what's been delivered (and its status) and a quick way to get to incomplete shipments
- By giving them more information, though, they'll have a lot to consume, so I created a dashboard that only shows the absolutely necessary info at the top level, then drills down or expands to show more when needed



Shipment Details includes:

- Trip & GPS view
- Sensor Report
- Config snapshot
- Shipment Report
- Edit Shipment
- Stability Timer

Clicking the Edit icon will invoke the Edit Popover.

WIREFRAMES: Create a Shipment

biologistex

NEW SHIPMENT

Shipments

EVOs

Admin

Welcome [Homer Simpson!](#)
[New Shipment](#) | [Log Out](#)

Shipment Info

Set Alarms

Print Labels

Customer

Company Name

Enter company name

City

Enter address

State

Select

Address Line 1

Enter address

Zip Code

Enter zip code

Address Line 2

Enter address

Save to address book

Shipping Options

Outbound

☒ Overnight

☐ 1-2 days

☐ 3 days

EVO Return

☒ Overnight

☐ 1-2 days

☐ 3 days

Shipping Description (optional)

Enter description

Next

Cancel

save for later

The user can manually enter contact information for the recipient.

biologistex

NEW SHIPMENT

Shipments

EVOs

Admin

Welcome [Homer Simpson!](#)
[New Shipment](#) | [Log Out](#)

Shipment Info

Set Alarms

Print Labels

Customer

Company Name

Johnson Biologics

City

Seattle

State

WA

Address Line 1

1425 Evergreen Terrace

Zip Code

98101

Address Line 2

Suite 314

Saved

Shipping Options

Outbound

☐ Overnight

☒ 1-2 days

☐ 3 days

EVO Return

☐ Overnight

☒ 1-2 days

☐ 3 days

Shipping Description (optional)

Enter description

Next

Cancel

save for later

Once saved, the option will be disabled, and the text will change to show that the information has been saved.

WIREFRAMES: Create a Shipment

The wireframe shows a web application interface for creating a shipment. At the top, there's a navigation bar with the 'biologistex' logo and tabs for 'Shipments', 'EVOs', and 'Admin'. A user greeting 'Welcome Homer Simpson!' and links for 'New Shipment' and 'Log Out' are on the right. The main area is titled 'NEW SHIPMENT' and has three tabs: 'Shipment Info', 'Set Alarms' (which is active), and 'Print Labels'. The 'Set Alarms' tab contains two main sections: 'EVO Pack-out Time & Stability Period*' and 'Other Alarms'. The first section has input fields for 'hr', 'min', 'am', 'on', a date '04/15/15', and a 'Stability period*' in hours. The 'Other Alarms' section has four checkboxes for different alert conditions, each with a corresponding input field. Below these is a 'Review/Edit Configuration*' section with an 'EVO Name/ID' field and an 'EVO Template/Config' dropdown. To the right of the 'Other Alarms' section is a 'Send Alerts & Alarms To:' section with a list of contacts (Me, Joan Chase, James Franco) and an 'Add contact number or email' button. At the bottom right of the form are 'Next' and 'Cancel' buttons, and a 'save for later' link. A red note at the bottom right states '*This must be entered to continue'. The footer contains 'BioLogistex © 2015' and links for 'about us', 'terms & conditions', 'privacy policy', and 'support'.

The user will need to have an EVO ready, and to enter the pack-out time at the time of creating the shipment.

If they haven't packed the EVO yet, they won't be able to continue the shipment and will need to save it for later.

NOTE: Since we need the user to enter the time in order to let them move to the next step, **there can be no default time in the related fields.**

The wireframe shows a 'New Configuration' dialog box. It has a title bar and a main content area. The content area is divided into two columns. The left column contains four sliders for 'Battery Life', 'Payload Temperature', 'Humidity', and 'Pressure'. Each slider has a title, a description of the alarm condition, and a range of values. The right column is titled 'Power Management' and contains three radio button options: 'Super Saver', 'Battery Saver', and 'Data Max'. Each option has a description of its behavior. At the bottom right of the dialog are 'Done' and 'Cancel' buttons, and a 'Save as a template' link.

When setting a new configuration, the assumption is that it only applies to THIS shipment, and hence doesn't need a name.

Smart defaults should display here, based on the customer's typical shipment type. This can be set by BL CSRs when setting up the customer.

VISUAL STYLE EXPLORATIONS

biologistex

Shipments

EV Os

Account

Welcome, Mike Rice

New Shipment

PENDING SHIPMENTS

<RECIPIENT CLIENT>
Tissue Samples

<RECIPIENT CLIENT>
Stem cells

<RECIPIENT CLIENT>
Tissue Samples

<RECIPIENT CLIENT>
Stem cells

<RECIPIENT CLIENT>
Tissue Samples

<RECIPIENT CLIENT>
Stem cells

RECENTLY DELIVERED

<RECIPIENT CLIENT>
04/27/15 | 3:03pm
Stem Cells
Stability Time Remaining
00:13

<RECIPIENT CLIENT>
04/27/15 | 3:03pm
Lung
Stability Time Remaining
06:27

<RECIPIENT CLIENT>
04/27/15 | 3:03pm
Lung
Stability Time Remaining
19:02

<RECIPIENT CLIENT>
04/27/15 | 3:03pm
Heart
Stability Time Remaining
06:34

ACTIVE

HISTORY

Last updated at 10:38am

TRACKING NUMBER	RECIPIENT	CONTACT	STATUS
Z1472698357p	Johnson Biologics	James Franco	Awaiting carrier pickup
Z1472698357p	Merilal	<Person Name>	In Transit
Z1472698357p	biotech1	<Person Name>	
Z1472698357p	BioSolutions	<Person Name>	In Transit
Z1472698357p	Stem Cell Pros	<Person Name>	
Z1472698357p	Hutchinson	<Person Name>	
Z1472698357p	Stanley Treatments	<Person Name>	
Z1472698357p	Cancer Center Cures	<Person Name>	
Z1472698357p	21st Century Medicine	<Person Name>	
Z1472698357p	LifeNet Solutions	<Person Name>	
Z1472698357p	CareCure	<Person Name>	
Z1472698357p	Global Biotech	<Person Name>	

biologistex

Shipments

EV Os

Account

Welcome, Mike Rice

New Shipment

NEW SHIPMENT

Customer*

Company Name

Enter or choose company

City

Enter city

Address Line 1

Enter address

State

Select State

Address Line 2

Enter address

Zip Code

Enter zip code

Next

Cancel

save for later

Shipping Options*

Overnight

1-2 Days

2-3 Days

Overnight

1-2 Days

2-3 Days

☐ Include insurance on outbound shipment

☐ Include insurance on return shipment

☒ Require signature upon delivery

Item Description (optional)

Shipment Info

Set Alarms

Print Labels

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about us

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privacy

support

20

3 ACCENTURE'S PENSION SYSTEMS TRANSFORMATION

ACCENTURE: DIGITAL PENSIONS PLANNING

Project Value& Impact

Today, most public pensions & their systems are managed entirely offline and through paper-based processes.

Accenture aims to provide wide-scale digital transformation to states & municipalities across the US & Canada by digitizing everything from account statements, contribution adjustments, to the end-to-end retirement application process.

IMPACT: Dramatic reduction in support calls, errors, rework for end users and public employees, and the revolutionary transformation of one of the oldest public systems in history. The State of MI also saw significant increase in pension participant satisfaction and a greatly improved reputation with their constituents.

Project Description

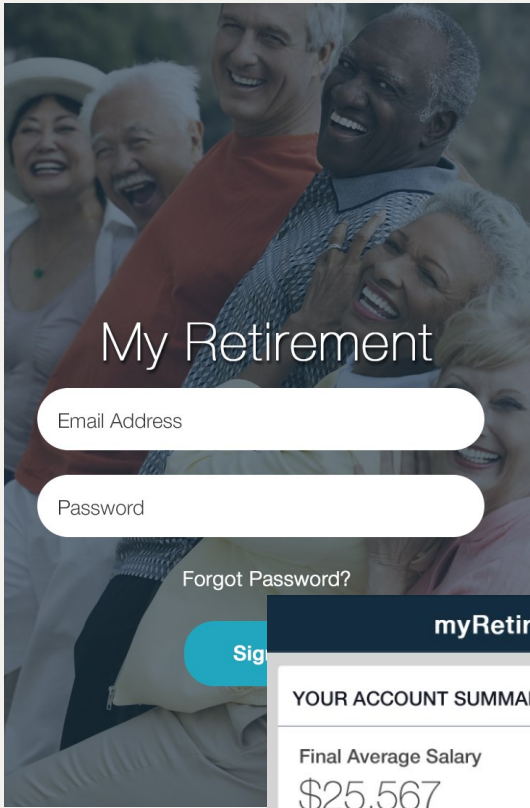
Accenture looks for new client opportunities by identifying gaps in specific industries & prototyping solutions to fill those gaps. A recent opportunity arose with the discovery that most states & municipalities still manage and take applications for pensions via *paper-based forms & processes*. The goal was to provide digitized self-service to employees contributing to a given pension fund, and to fully digitize the retirement application process.

Project Scope

- Build a high-level clickable prototype illustrating mobile pensions app concept
- Conduct research & gather requirements for actual app release
- Create base-level, client-agnostic asset aimed at future pensioners
- Create base asset for employers who report contributions to pension system
- Pitch base assets to prospective clients
- Create custom versions of base asset for contracted clients

Role & Contributions

- Conducted deep industry research (pensions, wealth management & fintech
- Created new & updated existing clickable prototypes & conceptual designs of base asset (end-user/future pensioner focused)
- Customized prototype for pitches to Ontario (ORPP), State of NY and State of MI
- Created interaction model, information architecture, wireframes, functional specifications, visual designs, and style guides
- Worked directly w/State of MI to fully redesign base asset from the ground up to meet their specific needs



myRetirement

YOUR ACCOUNT SUMMARY

As Of: 9/23/2015

Final Average Salary

\$25,567

Total Service

4 yrs 5 mo

Account Detail

Talk to a Counsler

JUST FOR YOU

2015 annual report now available

Retirement FAQs

Thinking about retirement when you're 30

Another Just for You Link

My Benefits

My Profile

Resources

Contact Us

RESEARCH & PERSONAS: METHODOLOGY

- Interviewed Pension Administration Employees
- Conducted “guerilla” industry research to learn about public pensions in general
- Conducted “guerilla” research to understand the mental model of public employees and how they think about retirement and managing their pension

20

Public Pension
Employee
Interviews

15+

Future
Pensioner
Interviews

5

States &
Municipalities
Included

RESEARCH & PERSONAS: SNIPPETS

QUESTION	ANSWER
GENERAL	
How would you describe your role?	Originator for NA pensions. Externally he's making sure that clients & customers understand who Accenture is and where they're going
What about the current benefits industry do you find most interesting and/or relevant to what we can do for clients & pensioners?	portfolio focus on 60 - 100 million modernization projects. Future diversify portfolio, looking for opportunity to attract smaller projects. Take Accenture digital point of view and extend it to the digital space.
GOALS	
How would you describe the #1 business goal that you/Accenture have for delivering to benefits organizations?	Lots of focus on monetization (?) type projects. The plan is to diversify portfolio of offerings; looking for different types of projects. Intent is to take Accenture's digital POV and extend it to the Pension Market.
What is the biggest area of need you hear about when speaking with prospective clients?	3 things that clients do: 1) Administer Pensions. Receiving contributions form State/City/Municipality for employees and put them toward Defined Benefit retirements. receive contributions from employees, take funds and put into trust fund and put into retirement benefitz) 30+% of pension providers provide life and health insuracne services subsidized by pension. Provide some level of healthcare/life/dental/vision. Essentially subsidized by pension system & held against Pension funds. 3) vestment house Monies put in to trus fund is managed to get a defined rate of return. They're an investment house. Where there's a Defined Contribution & fund, they're there to get a defined rate of return. They do a lot of Actuarial type of work. Notion of site/self-service is going to shift. We're going to start pushing systems to look at the member as an active member in managing the funds. Will move away from the paradigm that you have to be in front of a computer or at a desk. The shift will enable members & employers to do this on a mobile device. "Service when I want it, where I want it and how I want it." Mobile, highly interactive, and somewhat transparent and automated. For example, why does the member have to administer the system? The system already has all their info. Why not have a SIRI type helper that administers the functions through the system. By mobilizing this, you start moving toward that new paradigm.

Have any prospective clients expressed pensioners mobile access to benefits info transactions?	25 yr old just joined Civil Service (less than 75% completion toward eligibility for pension)	I put my money? Coaching/Counseling are key for these users. It needs to be very transparent - they need to have Pension System - they will not know what to ask for. To get reminders and make sure they're on track, things like investment allocation did last year and whether or not they need to change it. Flexibility is really important for them. They may be thinking about taking a loan against their plan in order to buy a major.
DEMOGRAPHICS	Very close to retirement	These members are concerned with figuring out how to maximize their retirement/investment. They're not looking to tell the Pension System what they want, where they want to be in <X> amount of time. They may want to buy a house. As they come to within ~a year to 3 months of retirement, it becomes more critical for them to think about what they want and planning. They need access to information about what their peers have done. This is where the app needs to connect with people they could talk to about what they've decided to do. It's about connecting with peers, not about getting advice.
	Newly Retired	Really concerned with "I'm not getting my salary, when is my pension check going to come?" Making sure pension is correct, ensuring their contact info is correct. Making sure that nothing goes sideways with their pension payments. If changed, like beneficiaries, address, healthcare needs - to push this info to the pension system.
	Post Retirement ~5 years	Not worried that the pension system is going to screw something up. It's more about checking in on things periodically. <i>what's happening in Marketplace that impacts me?</i> Changes to healthcare regulations, changes in eligibility, tax changes. They need the Pension System to PUSH information when it happens, not just a newsletter. E.G., your spouse turns 65, you might be eligible for a 2% reduction in healthcare contribution. They should be able to "click here" from any notification to take action.

PERSONAS SUMMARY

Pre-Retirement			
	PAULA MYO - Recently began her career - Still figuring out benefits and pension plans		GEORGE GLASS - Almost ready to retire - Making sure loose ends are tied up and last-minute decisions are made

Post-Retirement			
	THOMAS ANDERSON - Recently retired - Needs to make sure his payments are on the way		KATHRYN JANEWAY - Retired for years - Needs to check in periodically - Contributes to MyRetirement community

PAULA MYO



I need guidance on making the right decisions for my pension plan, and the flexibility to make changes on the fly, whenever I need to.

Key Distinctions

- Just started her career as an Auditor with the WA State Dept. of Revenue
- Still figuring out her pension plan and learning to making well-informed decisions
 - Given her educational background in finance, she's already thinking about retirement and investments

Key Needs

- Easy access to counseling
- Flexibility in making changes as she learns more about her pension
- Ensuring her investments are on track

GEORGE GLASS

SCENARIOS



Scenario 1

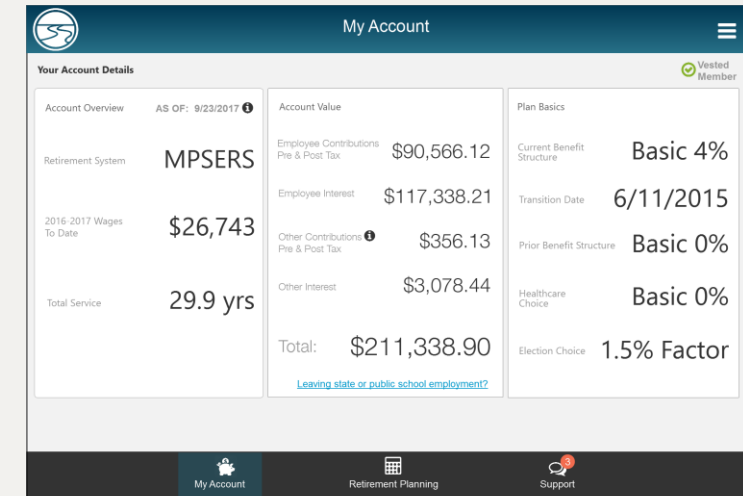
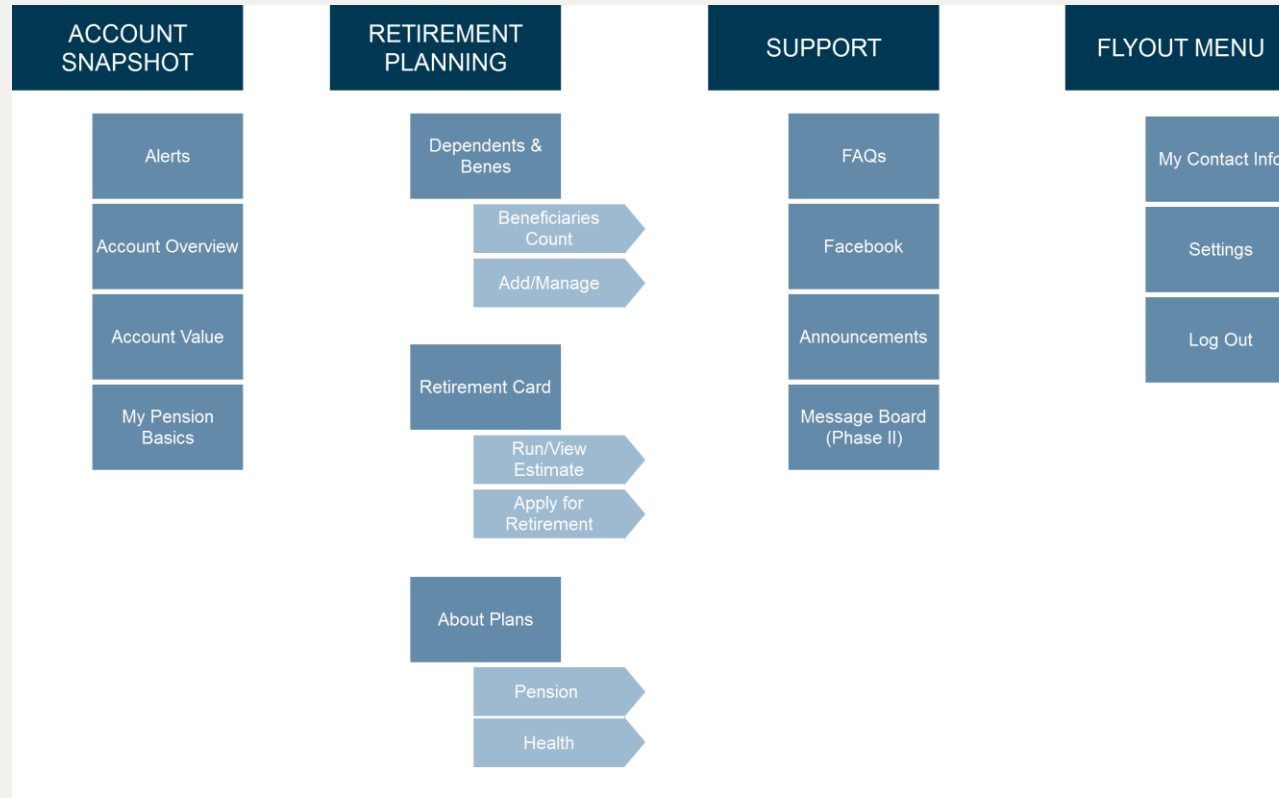
As George gets closer to retirement, he realizes that certain information in his profile is probably not up to date. In addition, he's very close with his niece whose father passed away—he wants to make her a beneficiary of part of his pension. He's delighted to see that he can have her email him her proof of identity, and can easily add her and upload her docs through the MyRetirement app.

Scenario 2

George is trying to make some final decisions about his pension plan as he approaches retirement. He knows every choice he makes now is critical, so being well-informed is of the utmost importance. He uses the MyRetirement app's Benefit Estimator to weigh the pros and cons of pushing his retirement out a little further, or sticking with his original plan. The Estimator enables him to explore several different scenarios and get a clear picture. When he needs to, he uses the chat feature to get deeper information to help make his decision.

INFORMATION ARCHITECTURE

ACTIVE MEMBER



"My Account" would be the new Landing Page. It surfaces information related to the finance aspect of the user's data (Service, contributions, account value thus far).

The Account Overview Card is exactly the same and in the same place (App Landing Page). The Account Value Card is simply bubbled up to the top level of the UI instead of being accessed through the sub/side menu.

"Plan Basics" is still under review, and may move to the Flyout Menu; it's meant to surface read-only, non-actionable basic information about the member's retirement system and benefit plan.

With this Navigation Model, there are 3 App Menu Items:

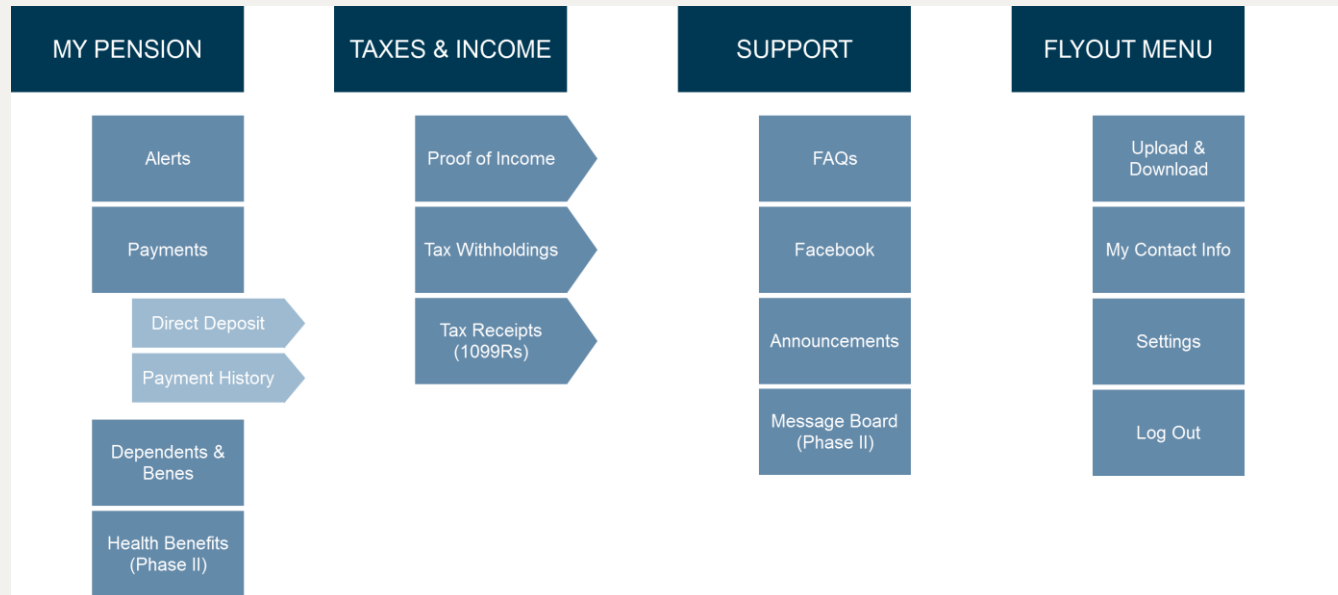
- My Account
- Retirement Planning (or "Pension Planning")
- Support (Groups Resources & Contact Us, since these are very scaled down/simplified for ORS)

The Flyout Menu would house things that are

- Settings/Profile related
- Items that are of much lower importance and don't fit with the main nav categories

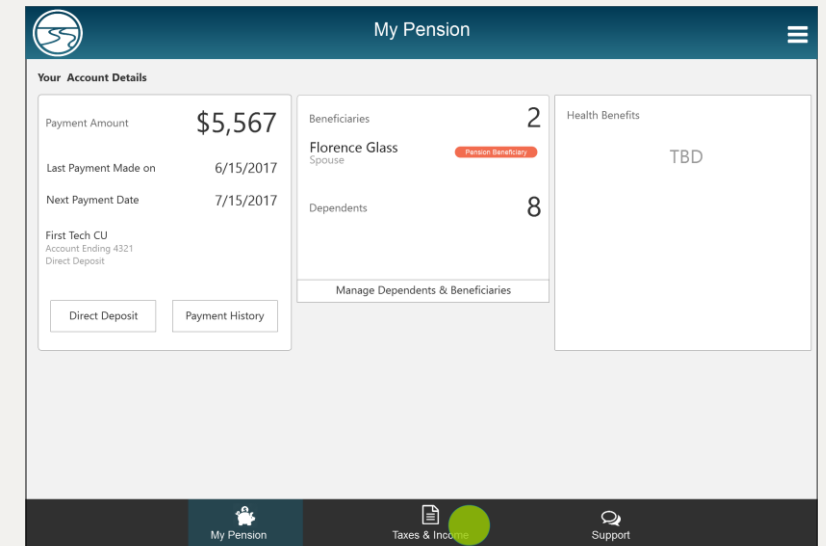
INFORMATION ARCHITECTURE

RETIRED MEMBER



Scenarios for Retirees are very different. For this reason, we would restructure the app for after a user retires and they'd see this Navigation Model instead. There are still 3 Main Nav items:

- My Pension (payments, financial info, Beneficiaries - since they're also receiving benefits/money)
- Taxes & Docs (tax information, proof of income, and potentially other documents and forms in the future)
- Support (same as for Active Members, but potentially with Targeted Content)



The My Pension Page includes the Payment Card; the only change to this card is that there's a PAYMENT HISTORY button. It makes sense to put this in the card since we're displaying the Last Payment Date here.

Beneficiaries Card is the same as for Active Members.

ROUGH WIREFRAMES

The first two wireframes show the 'My Account' page. The first card is 'Account Overview' with 'AS OF: 9/23/2017'. It displays '2016-2017 Wages To Date' as \$26,743 and 'Total Service' as 29.9 yrs. The second card is 'Account Value' showing 'Total' as \$211,338.90. The third card is 'Plan Basics' showing 'Current Benefit Structure' as Basic 4%. The third wireframe shows the 'Plan Information & Other Helpful Something' page. It has a 'Run Estimate' button. Below is a 'You Can Retire As Soon As' card showing 9/20/2018 for Age 67, with an 'Apply for Retirement' button. The 'Beneficiaries' card shows 2 beneficiaries, with 'Florence Glass Spouse' listed as a 'Pension/Refund Beneficiary'. The 'Dependents' card shows 0 dependents with an 'add dependent' button. A 'Manage Dependents & Beneficiaries' button is at the bottom.

Here, the Beneficiaries/ Dependents Card displays an example of how the app may visually indicate that someone is both a Pension and Refund Beneficiary.

The 'Pension Estimate' screen has a '< Back' button and a 'Pension Estimate' title. It features a 'New Estimate' button and a 'Saved Estimates' button. Below is a text block: 'See how your pension benefit changes using different scenarios like working longer or choosing one of the survivor options.' The 'Retirement Type' section has a dropdown menu with 'Select' and a chevron icon. The 'Last Date You Worked or Intend to Work' section has a date input field with 'enter date' and a calendar icon. The 'Retirement Effective Date' section has a date input field with 'enter date' and a calendar icon. At the bottom are 'Cancel' and 'Next' buttons.

The My Account Page includes Cards/Data related to finances and service (Contributions, wages, years worked).

If the member is new to the system, the app will still display all the lines of data. It is not likely that they would be in the retirement system/use the app and actually have **zero** showing up for these values, however.

NOTE: (Account Value Card) Some members will not have *Other Contributions & Interest* or *Other Interest*. In these cases, we will not display these lines/values.

NOTE: (Plan Basics Card).Some members will not have a *Transition Date* (if they're new to the system). In these cases, the app will hide this value

Design Rationale:

- Needed a "smart" app that displays appropriate info/functionality based on 3 Personas
 - Younger Planner
 - Pre-retirement
 - Retiree
- Card-based approach is great for financial information that has tiers of importance (e.g., summary vs. detail)
- Users aren't going to come to the app often, so always bubble up the most relevant information in the card for glance-able view of critical data (e.g., my total account value/contributions so far)

WIREFRAMES: Pension Estimate

Estimate - Basic Info

[< Back](#) Pension Estimate

New Estimate | Saved Estimates

See how your pension benefit changes using different scenarios like working longer or choosing one of the survivor options.

Retirement Type
Select 1

Last Date You Worked or Intend to Work
enter date 2

Retirement Effective Date
enter date 3

Cancel | Next

Estimate - Basic Info

[< Back](#) Pension Estimate

New Estimate | Saved Estimates

See how your pension benefit changes using different scenarios like working longer or choosing one of the survivor options.

Retirement Type
Regular

Last Date You Worked or Intend to Work
07/31/2025

Retirement Effective Date
08/2025

Cancel | Next

Estimate - Service

[< Back](#) Pension Estimate

New Estimate | Saved Estimates

See how your pension benefit changes using different scenarios like working longer or choosing one of the survivor options.

Total Service
Purchased/Earned 19.0245 yrs

Potential Service (Optional)
Still Unpaid
0.0000 1

Projected Service ⓘ
25.1200

Projected Annual Wage Increase
0% 2

Pension Beneficiary
Select

[Add New Beneficiary](#) 3

Cancel | Next

Add New Beneficiary

[< Back](#) Add Beneficiary

Enter your beneficiary's information here. They will also be saved to your list of dependents.

First Name
enter first name

Middle Name (Optional)
enter middle name

Last Name
enter last name

Suffix (Optional)
Select

Relationship
Select

Date of Birth
enter date of birth

SSN
enter ssn

Marital Status
Select

Gender
Select

Cancel | Next

Enter information for new contact. Clicking cancel takes the user back to the previous page.

Add New Beneficiary

[< Back](#) Add Beneficiary

Enter your beneficiary's information here. They will also be saved to your list of dependents.

First Name
Cercei

Middle Name (Optional)
enter middle name

Last Name
Lannister

Suffix (Optional)
Select

Relationship
Child

Date of Birth
1/5/1990

SSN
666-66-6666

Marital Status
Single

Gender
Female

Cancel | Next

Enter information for new contact. Clicking cancel takes the user back to the previous page.

WIREFRAMES: Pension Estimate

Confirm Beneficiary Details

< Back Add Beneficiary

Confirm Beneficiary Details

Name	Cersei Lannister
Relation	Child
DOB	1/5/1990
SSN	666-66-6666
Marital Status	Married
Gender	Female

Cancel

Next

Estimate - Service

< Back Pension Estimate

New Estimate Saved Estimates

See how your pension benefit changes using different scenarios like working longer or choosing one of the survivor options.

Total Service Purchased/Earned	19.0245 yrs
--	-------------

Potential Service (Optional) ⓘ
988 USRS/40

3.2200

Projected Service ⓘ
25.1200

Projected Annual Wage Increase
3%

Pension Beneficiary
Cersei Lannister (Child)

[Add New Beneficiary](#)

Cancel

Next

Estimate - FAC

< Back Pension Estimate

New Estimate Saved Estimates

See how your pension benefit changes using different scenarios like working longer or choosing one of the survivor options.

Total Service Purchased/Earned	19.0245 yrs
--	-------------

Final Average Compensation
\$70,501.01

Based On

2012	\$72,030.32
2011	\$71,973.13
2010	\$71,001.06
2009	\$70,654.74
2008	\$69,273.92

Cancel

Next

Estimate Results

< Back Pension Estimate

Estimate Results

100% Survivor
0.918 option reduction

\$3,326 Monthly	\$39,918 Annually
-----------------------------------	-------------------------------------

Survivor Payout

\$3,326 Monthly	\$39,918 Annually
-----------------------------------	-------------------------------------

75% Survivor
0.937 option reduction

\$3,396 Monthly	\$40,745 Annually
-----------------------------------	-------------------------------------

Survivor Payout

\$2,546 Monthly	\$30,559 Annually
-----------------------------------	-------------------------------------

50% Survivor
0.957 option reduction

\$3,396 Monthly	\$41,6145 Annually
-----------------------------------	--------------------------------------

Survivor Payout

\$1,734 Monthly	\$20,807 Annually
-----------------------------------	-------------------------------------

Estimate Based On

Retirement Type	Regular
Retirement Effective Date	09/30/38 Age 65 yrs

[View Cost of Living Increase Information](#)

Discard

Done

Expanded Summary Card

< Back Pension Estimate

Estimate Results

100% Survivor
0.918 option reduction

\$3,326 Monthly	\$39,918 Annually
-----------------------------------	-------------------------------------

Survivor Payout

\$3,326 Monthly	\$39,918 Annually
-----------------------------------	-------------------------------------

75% Survivor
0.937 option reduction

\$3,396 Monthly	\$40,745 Annually
-----------------------------------	-------------------------------------

Survivor Payout

\$2,546 Monthly	\$30,559 Annually
-----------------------------------	-------------------------------------

50% Survivor
0.957 option reduction

\$3,396 Monthly	\$41,6145 Annually
-----------------------------------	--------------------------------------

Survivor Payout

\$1,734 Monthly	\$20,807 Annually
-----------------------------------	-------------------------------------

Estimate Based On

Retirement Type	Regular
Retirement Effective Date	09/30/38 Age 65 yrs

Beneficiary's DOB 12/06/60

Annual Percentage Wage Increase 1%

Total Service

Transition Date	10/02/38
Earned or purchased as of 6/01/17	32.3823
Service at 1.5% pension factor	32.3823

Final Average Compensation \$70,501.01

[View Cost of Living Increase Information](#)

Discard

Done

End - Saved Estimates

< Back Pension Estimate

New Estimate Saved Estimates

See previous results, and explore different scenarios

delete

Estimate Created On <date>
<Termination Date>, <Retirement Date>

New Estimate Saved

WIREFRAMES: Apply for Retirement

RETIREMENT APPLICATION STEP LIST STATES

< Back Apply for Retirement Welcome to the ORS Retirement Application. You will want to set aside at least 1 hour for this process. Tools for Completing Your Application Pension Estimate START Health Insurance START Tax Withholding START Direct Deposit START Certification & <Descriptor> START Retirement Checklist Submit	< Back Apply for Retirement Welcome to the ORS Retirement Application. You will want to set aside at least 1 hour for this process. Tools for Completing Your Application ✓ Pension Estimate Retirement Effective Date 09/30/18 EDIT Health Insurance START Tax Withholding START Direct Deposit START Certification & <Descriptor> START Retirement Checklist Submit	< Back Apply for Retirement Welcome to the ORS Retirement Application. You will want to set aside at least 1 hour for this process. Tools for Completing Your Application ✓ Pension Estimate Retirement Effective Date 09/30/18 EDIT Health Insurance FINISH Tax Withholding START Direct Deposit START Certification & <Descriptor> START Retirement Checklist Submit	< Back Apply for Retirement Welcome to the ORS Retirement Application. You will want to set aside at least 1 hour for this process. Tools for Completing Your Application ✓ Pension Estimate Retirement Effective Date 09/30/18 EDIT Health Insurance EDIT Tax Withholding EDIT Direct Deposit START Certification & <Descriptor> START Retirement Checklist Submit	< Back Apply for Retirement Welcome to the ORS Retirement Application. You will want to set aside at least 1 hour for this process. Tools for Completing Your Application ✓ Pension Estimate Retirement Effective Date 09/30/18 EDIT Health Insurance EDIT Tax Withholding EDIT Direct Deposit EDIT Certification & <Descriptor> START Retirement Checklist Submit	< Back Apply for Retirement Welcome to the ORS Retirement Application. You will want to set aside at least 1 hour for this process. Tools for Completing Your Application ✓ Pension Estimate Retirement Effective Date 09/30/18 EDIT Health Insurance Declined Tax Withholding EDIT Direct Deposit EDIT Certification & <Descriptor> EDIT Retirement Checklist Submit	< Back Apply for Retirement Welcome to the ORS Retirement Application. You will want to set aside at least 1 hour for this process. Tools for Completing Your Application ✓ Pension Estimate Retirement Effective Date 09/30/18 EDIT Health Insurance Declined Tax Withholding EDIT Direct Deposit EDIT Certification & <Descriptor> EDIT Retirement Checklist Rescind Retirement Application Resubmit	< Back Apply for Retirement Welcome to the ORS Retirement Application. You will want to set aside at least 1 hour for this process. Tools for Completing Your Application ✓ Pension Estimate Retirement Effective Date 09/30/18 EDIT Health Insurance Declined Tax Withholding EDIT Direct Deposit EDIT Certification & <Descriptor> EDIT Retirement Checklist Rescind Retirement Application Resubmit
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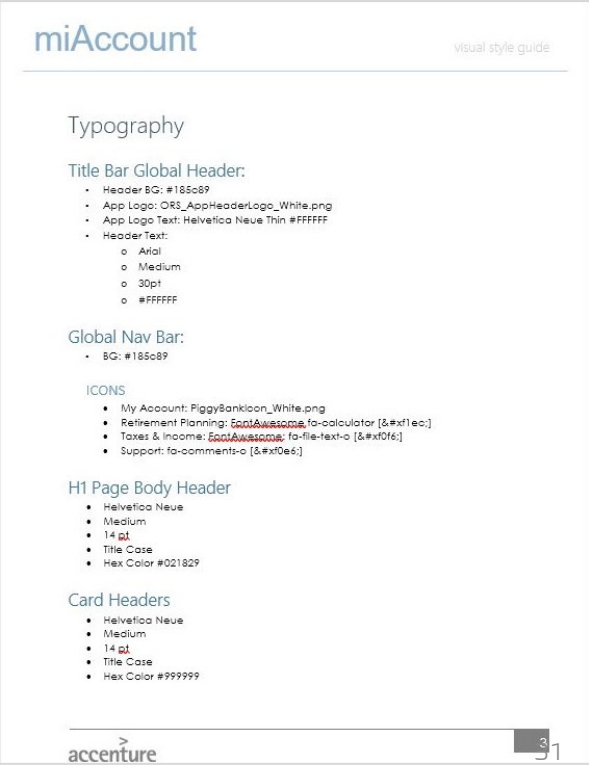
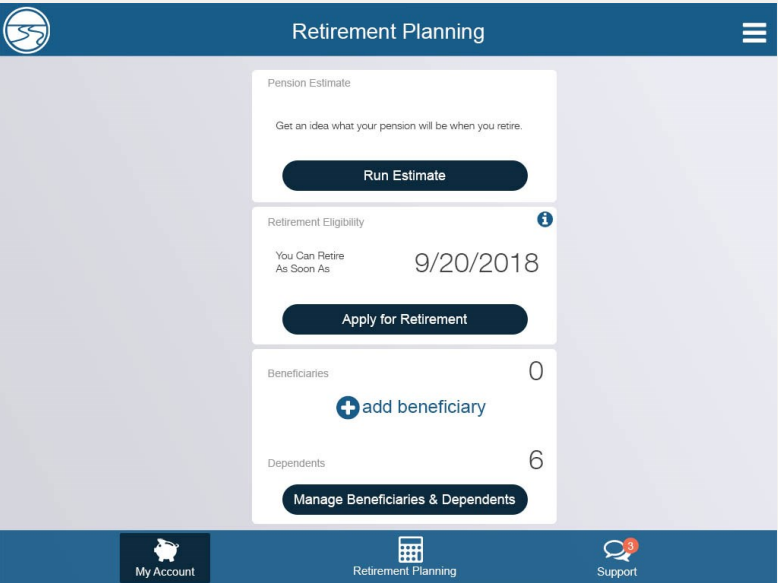
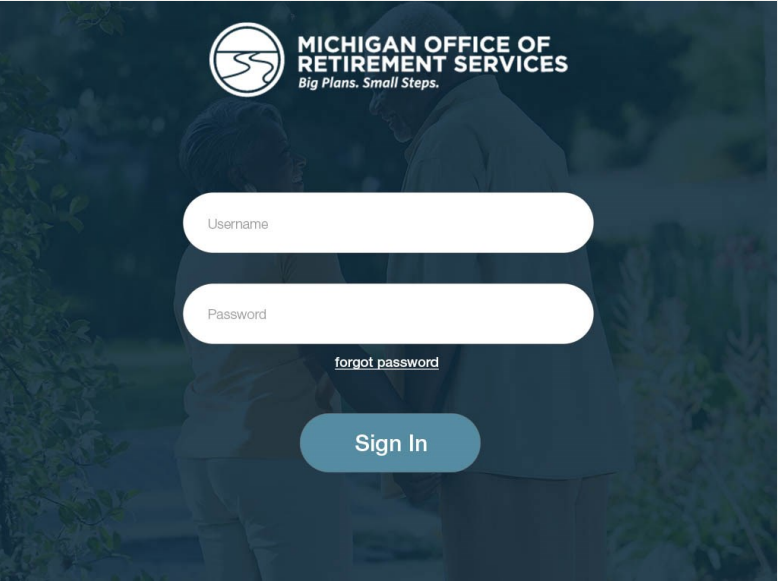
Each step that has been completed will include a visual indicator (checkmark).

If a step in the list has been started and saved for later, but not completed, the link for that item will toggle to FINISH. The next step in the list is NOT enabled until the incomplete step is finished.

When a step is completed, the following step in the list and the related link are enabled.

- Design Rationale:
- This was an *extremely* complex and daunting process, and I spent a lot of time toward the end of the project getting this right
 - I created a Step List, which started with an Intro informing the user of ALL materials & info they'd need to get through the process
 - I also lobbied for the development team to enable State Persistence, so that users could leave the workflow and come back without having to restart

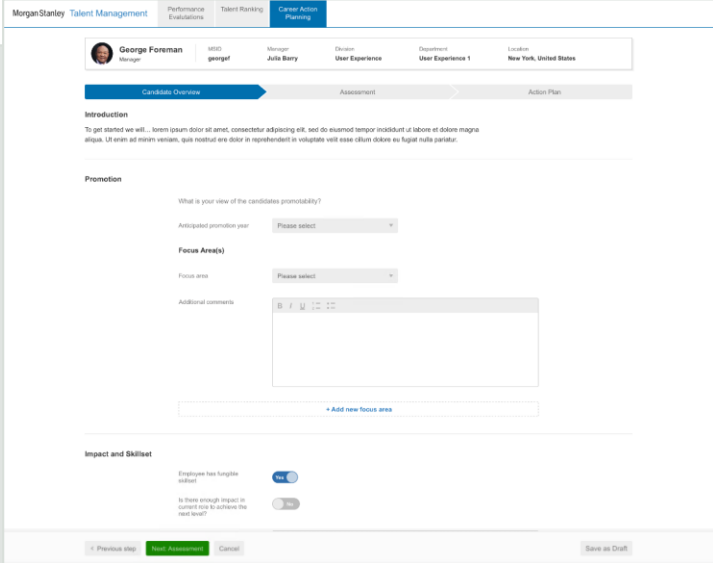
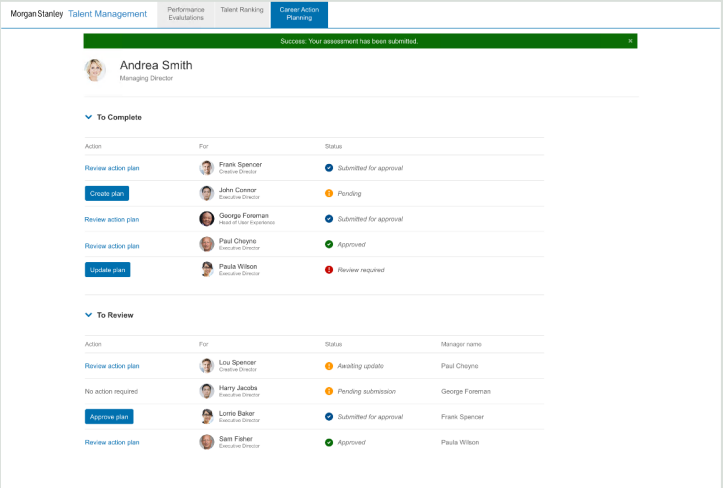
VISUAL DESIGNS & STYLE GUIDE SNIPPETS



4 MORGAN STANLEY'S HR TALENT MGMT TOOL

MORGAN STANLEY: TALENT MGMT

Project Description	HR at Morgan Stanley was exploring ways to promote associates from within, and to develop associates in demographics that historically had less opportunity to move up within the company. They wanted a new Talent Management Tool that would enable managers to create and talent-related tasks, and manage employee development in an easy, auditable way.
Project Value & Impact	At the time of this project, Morgan Stanley was undergoing a cultural shift, and working to be more inclusive and diverse. The creation of this tool was an innovative approach to giving managers a systematic way to create opportunity for their employees, and to hold managers accountable for growing their people.
Project Scope	- Identify business goals, HR practices and related constraints, and user needs - Prototype and test the experience - Deliver this interactive tool in time for midyear career discussions
Role & Contributions	As sole Product & Design Strategy Consultant, I: - Conducted user research & competitive analysis - Researched tracking device & existing tracking portal (leveraged from the ankle bracelets worn by house-arrest inmates) - Provided consultation & leadership on product & design strategy - Led brainstorming sessions - Created feature spec, user flows, information architecture, wireframes, branding elements, visual designs, style guide, and functional specs



RESEARCH & ANALYSIS

- Interviewed people leaders to understand their mental model, pain points, and needs re: talent management and growing their people
- Interviewed HR regularly to understand geopolitical and general HR constraints and sensitivities
- Met with HR regularly to tease out and continuously refine requirements

1

Week of
Deep Analysis

6

People
Leader
Interviews

3

Prototype
Usability
Sessions

EARLY CONCEPTS

MorganStanley Talent Management

Performance Evaluations

Talent Ranking

Career Action Planning

Tasks

Dashboards

Tasks for Me

Talent Planning

	For	Status
Review Action Plan	 Myself Executive Director	Submitted
Complete Assessment	 Matthew Drazin Vice President	Pending
Complete Assessment	 Richard Marsh Vice President	Pending
Complete Assessment	 Damian Haase Vice President	Submitted
Complete Assessment	 Grant Swanepoel Executive Director	Submitted
Complete Assessment	 Sam Wheeler Vice President	Submitted

MorganStanley Talent Management

Performance Evaluations

Talent Ranking

Career Action Planning

Talent Planning



George Foreman

MSID

1234XYZ

Corporate Title

Manager

Operations Role Title

Manager

Department

User Experience

Subdepartment

User Experience 1

City

New York

Region

North America

Manager History

Current Manager

Kathryn Janeway

Managers w/in Last 2 Years

Kathryn Janeway

Edit

Form Completed By

Kathryn Janeway

Candidate Overview

Assessment

Action Plan

Assessment & Action Plan

To get started, we wil....

BEGIN ASSESSMENT

TALENT MANAGEMENT DASHBOARD

MorganStanley

Talent Management

Performance Evaluations

Talent Ranking

Career Action Planning

Success: Your assessment has been submitted.



Andrea Smith

Managing Director

▼ To Complete

Action	For	Status
Review action plan	 Frank Spencer Creative Director	✔ Submitted for approval
Create plan	 John Connor Executive Director	ⓘ Pending
Review action plan	 George Foreman Head of User Experience	✔ Submitted for approval
Review action plan	 Paul Cheyne Executive Director	✔ Approved
Update plan	 Paula Wilson Executive Director	❗ Review required

▼ To Review

Action	For	Status	Manager name
Review action plan	 Lou Spencer Creative Director	ⓘ Awaiting update	Paul Cheyne
No action required	 Harry Jacobs Executive Director	ⓘ Pending submission	George Foreman
Approve plan	 Lorrie Baker Executive Director	✔ Submitted for approval	Frank Spencer
Review action plan	 Sam Fisher Executive Director	✔ Approved	Paula Wilson

- Design Rationale:
- The Dashboard provides people leaders with a glanceable view of their team and talent related tasks
 - The list is organized by Task Type, and each section can be collapsed, in case the list gets long
 - Each task has a clear status, and the ability to drill in to view details.

WIREFRAMES: Candidate Assessment

Morgan Stanley Talent Management

Performance Evaluations

Talent Ranking

Career Action Planning

Talent Planning



George Foreman

MSID1234XYZ

Corporate TitleManager

Operations Role TitleManager

DepartmentUser Experience

SubdepartmentUser Experience 1

CityNew York

RegionNorth America

Manager History

Current ManagerKathryn Janeway

Managers w/in Last 2 YearsKathryn Janeway

Form Completed ByKathryn Janeway

Candidate Overview

Assessment

Action Plan

Assessment & Action Plan

To get started, we will....

BEGIN ASSESSMENT

- The workflow starts with an overview of the associate, and a clear indication of what to do next
- The Assessment comes in the form of a progressive disclosure form with collapsible sections
- Each section of the form can be interacted with and edited at any point in the assessment process

Morgan Stanley Talent Management

Performance Evaluations

Talent Ranking

Career Action Planning

Talent Planning



George Foreman

Corporate Title

Candidate Overview

Assessment

Action Plan

Assessment & Action Plan

What is your view of the candidate's achievements as it relates to each criteria below? Please also give an overall view of the candidate as relates to the 4Ps.

1 PERFORMANCE

	Needs Development	Meets Expectations	Exceeds Expectations	N/A
Client Service	☐	☐	☐	☐
Commercial Judgement	☐	☐	☐	☐
Ops Cultural Behavior	☐	☐	☐	☐
Risk Management	☐	☐	☐	☐
Supervisory Excellence	☐	☐	☐	☐
OVERALL PERFORMANCE	☐	☐	☐	☐

BackNext

2 IMPACT

3 POTENTIAL

4 PROFILE

5 SPONSORSHIP

Cancel

Save for Later

Back

Next

EARLY CONCEPT: Summary & Action Plan

Morgan Stanley

Talent Management

Performance Evaluations

Talent Ranking

Talent Planning

4 Ps Assessment



George Foreman
Corporate Title

OVERVIEW

Focus Areas: Professional Development
Fungibility

Impact: <Impact Description>

Behaviors: <Behavior>

Sponsorship: <Sponsor>
<Sponsor>
<Sponsor>
<Sponsor>

Update Assessment

ASSESSMENT SUMMARY

PERFORMANCE
Overall: GOOD

IMPACT
Overall: GOOD

POTENTIAL
Overall: GOOD

PROFILE
Overall: GOOD

SPONSORSHIP
Overall: GOOD

ACTION PLAN FOCUS RECOMMENDATIONS:
1. Professional Development
2. Client Service
3. Another Thing

Update Assessment

ACTION PLAN

ACTION 1
In Progress

Strategic Focus: Fungibility

Metric: Stakeholder agrees to vouch

ACTION 2
Not Yet Started

Strategic Focus: Professional Development

Metric: Stakeholder agrees to vouch

ACTION 3
In Progress

Strategic Focus: Fungibility

Metric: Stakeholder agrees to vouch

Focus Areas: Professional Development
Fungibility

Impact: <Impact Description>

Behaviors: <Behavior>

Sponsorship: <Sponsor>
<Sponsor>
<Sponsor>
<Sponsor>

Update Assessment

PERFORMANCE
Overall: GOOD

IMPACT
Overall: GOOD

POTENTIAL
Overall: GOOD

PROFILE
Overall: GOOD

SPONSORSHIP
Overall: GOOD

ACTION PLAN FOCUS RECOMMENDATIONS:
1. Professional Development
2. Client Service
3. Another Thing

Update Assessment

ACTION PLAN

ACTION 1
On Track

Strategy

Development Category: Professional Development
Development Area: Fungibility

Success Metric: Assignment approved by Department MD
Next Step: Identify relevant accreditation and course provider

Which of the 4 Ps is this Relevant to?: Performance
What is the Target Completion Date?: September 2021

Additional Comments: Enter

+ Add Action

VISUAL DESIGN: ACTION PLAN

MorganStanley

Talent Management

Performance Evaluations

Talent Ranking

Career Action Planning



George Foreman
Manager

MSID

georgef

Manager

Julia Barry

Division

User Experience

Department

User Experience 1

Location

New York, United States

Candidate Overview

Assessment

Action Plan

Action Plan

Create an action plan that...

Download - Manager view

Download - Employee view

Overview

Focus areas

Leadership

Sponsorship

Jonathon Francis

Sally Sparrow

Jackie Thomas

Luke Chadwick

Impact description

Impact description shall be placed here which will most likely span over more than one line of content on the page.

Assessment Summary

Overall assessment: Meets Expectations

Exceeds Expectations

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Managment

Supervisory Excellence

Impact

Meets Expectations

Exceeds

Meets

Areas to develop

Complexity of role

Criticality of role

Size & scope

Spans & layers

Potential

Exceeds Expectations

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Managment

Supervisory Excellence

Profile

Exceeds Expectations

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Managment

Supervisory Excellence

< Previous step

Next: Submit

Cancel

Save as Draft

Client service

Commercial Judgement

Energy

Risk Managment

Supervisory Excellence

Complexity of role

Criticality of role

Size & scope

Spans & layers

Potential

Exceeds Expectations

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Managment

Supervisory Excellence

Profile

Exceeds Expectations

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Managment

Supervisory Excellence

Sponsorship

Development Required

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Managment

Supervisory Excellence

Action Plan - minimum of 3 required

In order to support the candidates case, please create at least 3 actions

+ Action 1

+ Action 2

+ Action 3

< Previous step

Next: Submit

Cancel

Save as Draft

- I came up with the idea to display graphs (these are just early concepts thereof) to provide people leaders with a glanceable view at how the candidate is trending in the various areas measured during the Assessment
- I also conceived of a card layout for the Action Plan, to provide easy status & interactivity for making updates to the plan

FINALS: Assessment & Action Plan

MorganStanley Talent Management

Performance Evaluations

Talent Ranking

Career Action Planning



George Foreman

Manager

MSID
georgef

Manager
Julia Barry

Division
User Experience

Department
User Experience 1

Location
New York, United States

Candidate Overview

Assessment

Action Plan

Assessment

What is your view of the candidates achievements as it relates to each criteria below? Please also give an overview as it relates to the 4 Ps.

1 Performance

	Needs development	Meets expectations	Exceeds expectations	N/A
Client service	☐	☐	☐	☐
Commercial judgement	☐	☐	☐	☐
Culture carrier	☐	☐	☐	☐
Risk management	☐	☐	☐	☐
Supervisory excellence	☐	☐	☐	☐
Overall performance	☐	☐	☐	☐

Next

2 Impact

3 Potential

4 Profile

5 Sponsorship

< Previous step

Next: Action plan

Cancel

Save as Draft

MorganStanley Talent Management

Performance Evaluations

Talent Ranking

Career Action Planning



George Foreman

Manager

MSID
georgef

Manager
Julia Barry

Division
User Experience

Department
User Experience 1

Location
New York, United States

Candidate Overview

Assessment

Action Plan

Action Plan

Create an action plan that...

Download - Manager view

Download - Employee view

Overview

Focus areas

Leadership

Sponsorship

Jonathon Francis

Sally Sparrow

Jackie Thomas

Luke Chadwick

Impact description

Impact description shall be placed here which will most likely span over more than one line of content on the page.

Assessment Summary

Overall assessment

Meets Expectations

Impact

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Management

Supervisory Excellence

Complexity of role

Criticality of role

Size & scope

Spans & layers

Potential

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Management

Supervisory Excellence

Profile

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Management

Supervisory Excellence

Sponsorship

Development Required

Exceeds

Meets

Areas to develop

Client Service

Commercial Judgement

Energy

Risk Management

Supervisory Excellence

Action Plan - minimum of 3 required

Professional Development

Fungibility

Measure

Stakeholder agrees to vouch

Action(s)

Identify suitable project; agree to support plan

Reference

Platform

Timeline

June, 2021

Detailed description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

On track

Edit

Professional Development

Obtain License/Certificate

Measure

Stakeholder agrees to vouch

Action(s)

Identify suitable project; agree to support plan

Reference

Platform

Timeline

June, 2021

Detailed description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Not yet started

Edit

+ Add new action

< Previous step

Next: Submit

Cancel

Save as Draft

5 TRUSTY.care: A HEALTH INSURANCE STARTUP

TRUSTY.CARE: Medicare Plan Builder

Project Description	Trusty is a startup focused on enabling health insurance brokers to help senior clients find the best, most comprehensive, most affordable Medicare Plan.
Project Value & Impact	Finding a Medicare plan can be an absolute nightmare for senior citizens—and for insurance brokers. Much of the relevant information is spread across unusable websites and in PDFs with microscopic text. Trusty disrupted Medicare insurance brokering by building a Web App that enables brokers to shop what is tantamount to a shopping mall of insurance plans & combinations thereof, powered by a backend that pooled data from multiple sources, coupled with a powerful recommendations engine. This put the power in the hands of brokers <i>and</i> their senior clients, helping them find a plan without the pain and stress.
Project Scope	The goal was to overhaul the beta version of the app and build out a V1 for broader release.
Role & Contributions	- Conducted user research & competitive analysis - Conducted business analysis & requirements gathering - Redesigned the beta from the ground up - Designed the V1 app - Designed all printables generated by the app - Built interactive prototypes & tested with users - Helped build some of the frontend - Helped CTO manage the Agile development process

ABC Insurance

Dashboard

Welcome, User

Active

Incomplete

Pending

Suspended

Search Beneficiaries

add beneficiary

Name	Beneficiary ID	Status	Carrier	Medicare Plan	Drug Plan	Enroll Date
Nerys, Kira	0000-000-0000		Aetna	Health Insurance Plan of Greater NY	<This is an Example of a Long Plan Name for Testing>	<date>
Stark, Robb	0000-000-0000		Aetna	Empire Healthchoice HMO	<Plan Name>	<date>
Wolfschlegelsteinhausenbergerdorff, Hubert	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Fidelis	The NY State Catholic Health Plan	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Fidelis	The NY State Catholic Health Plan	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Fidelis	The NY State Catholic Health Plan	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Fidelis	The NY State Catholic Health Plan	<Plan Name>	<date>

Back to Recommendation Summary

Other Medigap Plans

\$185/mo

Humana

2020 Spending Estimate

Type G

\$2,400

VIEW DETAILS

SELECT

\$185/mo

Humana

2020 Spending Estimate

Type G

\$2,400

VIEW DETAILS

SELECT

\$125/mo

Humana

2020 Spending Estimate

Type G

\$2,400

VIEW DETAILS

SELECT

\$125/mo

Humana

2020 Spending Estimate

Type G

\$2,400

VIEW DETAILS

SELECT

\$285/mo

Humana

2020 Spending Estimate

Type N

\$2,400

VIEW DETAILS

SELECT

\$285/mo

Humana

2020 Spending Estimate

Type N

\$2,400

VIEW DETAILS

SELECT

\$285/mo

Humana

2020 Spending Estimate

Type N

\$2,400

VIEW DETAILS

SELECT

\$285/mo

Humana

2020 Spending Estimate

Type N

\$2,400

VIEW DETAILS

SELECT

BROKER DASHBOARD

ABCinsurance

Dashboard

Welcome, User!

Active

Incomplete

Pending

Suspended

Search Beneficiaries

+ add beneficiary

Name	Beneficiary ID	Status	Carrier	Medicare Plan	Drug Plan	Enroll Date
Nerys, Kira	0000-000-0000	Active	Aetna	Health Insurance Plan of Greater NY	<This is an Example of a Long Plan Name for Testing>	<date>
Stark, Robb	0000-000-0000	Suspended	Aetna	Empire Healthchoice HMO	<Plan Name>	<date>
Wolfeschlegelsteinhausenbergerdorff, Hubert	0000-000-0000	Incomplete	United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Active	United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Pending	Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Active	Fidelis	The NY State Catholic Health Plan	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Active	United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Pending	Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Active	Fidelis	The NY State Catholic Health Plan	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Active	United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Pending	Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000	Active	Fidelis	The NY State Catholic Health Plan	<Plan Name>	<date>

- Design Rationale:
- The Broker was designed to display a list of beneficiaries the broker worked with, giving them just the most relevant information at the top level of the UI
 - The Broker can click on any beneficiary in the list or search for them & drill down, in order to view/edit their details
 - This user group is often on the phone, trying to quickly grab information about whoever they're talking with, or need a way to quickly get information about a new beneficiary

WIREFRAMES SAMPLE

ADD BENEFICIARY [FLOWS]

Dashboard

Welcome, User!

Active Incomplete Pending Suspended

Search Beneficiaries

+ add beneficiary

Name	Beneficiary ID	Status	Carrier	Medicare Plan	Drug Plan	Enroll Date
Nerys, Kira	0000-000-0000		Adira	Health Insurance Plan of Greater NY	<This is an Example of a Long Plan Name for Testing>	<date>
Stark, Robb	0000-000-0000		Adira	Empire Healthchoice WAO	<Plan Name>	<date>
Wolfschlegelsteinhausenbergenborff, Hubert	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Fidels	The NY State Catholic Health Plan	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Fidels	The NY State Catholic Health Plan	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		United Healthcare	United Healthcare of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Humana	Humana Health Company of NY	<Plan Name>	<date>
<Last Name, First Name>	0000-000-0000		Fidels	The NY State Catholic Health Plan	<Plan Name>	<date>

Add a Beneficiary

1 2 3

Personal Information Medical Information Plan Options

Personal Information

First Name: <Name> Last Name: <Name>

Gender: ☐ Male ☐ Female Smoker?: ☐ Yes ☐ No

Date of Birth: <date> Zip Code (for Multiple Care Locations): <date>

Income Range (for Subsidy Eligibility): Please Select

Existing Medicare ID Number (Optional): <date>

Show Me: Medicare Original Plans Medicare Advantage Plans

Cancel Save & Exit NEXT

Add a Beneficiary

1 2 3

Personal Information Medical Information Plan Options

Personal Information

First Name: Kira Last Name: Nerys

Gender: ☐ Male ☐ Female Smoker?: ☐ Yes ☐ No

Date of Birth: 12/1/1984 Zip Code (for Multiple Care Locations): 10016

Income Range (for Subsidy Eligibility): Please Select

Existing Medicare ID Number (Optional): <date>

Show Me: Medicare Original Plans Medicare Advantage Plans

Cancel Save & Exit NEXT

Add a Beneficiary

1 2 3

Personal Information Medical Information Plan Options

Personal Information

First Name: Kira Last Name: Nerys

Gender: ☐ Male ☐ Female Smoker?: ☐ Yes ☐ No

Date of Birth: 12/1/1984 Zip Code (for Multiple Care Locations): 10016

Income Range (for Subsidy Eligibility): Please Select

Existing Medicare ID Number (Optional): <date>

Show Me: Medicare Original Plans Medicare Advantage Plans

Cancel Save & Exit NEXT

Add a Beneficiary

1 2 3

Personal Information Medical Information Plan Options

Personal Information

First Name: Kira Last Name: Nerys

Gender: ☐ Male ☐ Female Smoker?: ☐ Yes ☐ No

Date of Birth: 12/1/1984 Zip Code (for Multiple Care Locations): 10016

Income Range (for Subsidy Eligibility): Please Select

Existing Medicare ID Number (Optional): <date>

Show Me: Medicare Original Plans Medicare Advantage Plans

Cancel Save & Exit NEXT

Add a Beneficiary

1 2 3

Personal Information Medical Information Plan Options

Personal Information

First Name: Kira Last Name: Nerys

Gender: ☐ Male ☐ Female Smoker?: ☐ Yes ☐ No

Date of Birth: 12/1/1984 Zip Code (for Multiple Care Locations): 11223

Income Range (for Subsidy Eligibility): Please Select

Existing Medicare ID Number (Optional): <date>

Show Me: Medicare Original Plans Medicare Advantage Plans

Cancel Save & Exit NEXT

ADDING A BENEFICIARY

ABC

Add a Beneficiary

1

2

3

Personal Information

First Name

Last Name

<Name>

<Name>

Gender

Smoker?

☐ Male

☐ Female

☐ Yes

☐ No

Date of Birth

Zip Code (For Multiple Care Locations)

Enter <date>

Enter <code>

Income Range (For Subsidy Eligibility)

Please Select

Existing Medicare ID Number (Optional)

Enter <code>

Show Me

Medicare Original Plans

Medicare Advantage Plans

Cancel

Save & Exit

NEXT

ABC

Add a Beneficiary

1

2

3

Personal Information

First Name

Last Name

Kira

Nerys

Gender

Smoker?

☐ Male

☒ Female

☐ Yes

☒ No

Date of Birth

Zip Code (For Multiple Care Locations)

12/1/1954

10016

Income Range (For Subsidy Eligibility)

Please Select

\$85,001-\$107,000

\$107,001-\$132,000

\$132,001-\$140,000

\$140,001-\$499,999

\$500,000 and above

Prefer not to say

Cancel

Save & Exit

NEXT

ABC

Add a Beneficiary

1

2

3

Medical Information

Adding your client's preferred pharmacy, doctors & medications enables us to help you find the best plan options for them. We'll show you copays, in-network options, and confirm whether their doctor still accepts their selected plan in plan recommendations (Step 3).

Pharmacies

Doctors

Enter <code>

Enter <code>

City Chemist

Dr. Bashir

25-29 44th Dr. Long Island City, NY

323 38th Ave Suite D, NY, NY

QwikMeds

Dr. Galus Baltar

328 Ralph Ave Brooklyn, NY

13 Gafetica Ln NY, NY

Rite Aid

Dr. Beverly Crusher

30 Fulton Ave Brooklyn, NY

30 Federation St. Brooklyn, NY

Cancel

Save & Exit

NEXT

ABC

Add a Beneficiary

1

2

3

Medical Information

Adding your client's preferred pharmacy, doctors & medications enables us to help you find the best plan options for them. We'll show you copays, in-network options, and confirm whether their doctor still accepts their selected plan in plan recommendations (Step 3).

Pharmacies

Doctors

Enter <code>

Enter <code>

Medications

Enter <code>

Cancel

Save & Exit

NEXT

ABC

Add a Beneficiary

1

2

3

Medical Information

Adding your client's preferred pharmacy, doctors & medications enables us to help you find the best plan options for them. We'll show you copays, in-network options, and confirm whether their doctor still accepts their selected plan in plan recommendations (Step 3).

Pharmacies

Doctors

Enter <code>

Enter <code>

City Chemist

Dr. Bashir

25-29 44th Dr. Long Island City, NY

323 38th Ave Suite D, NY, NY

QwikMeds

Dr. Galus Baltar

328 Ralph Ave Brooklyn, NY

13 Gafetica Ln NY, NY

Rite Aid

Dr. Beverly Crusher

30 Fulton Ave Brooklyn, NY

30 Federation St. Brooklyn, NY

Medications

Enter <code>

Crestor 25 mg

Levothyroxine 25 mg

Metformin 50 mg

Trelogy 250 mg

Advair 20 mg

Linisopril 2 mg

Levothyroxine 25 mg

Metformin 50 mg

Trelogy 250 mg

Advair 20 mg

<Medication> 25 mg

<Medication> 25 mg

<Medication> 25 mg

<Medication> 25 mg

<Medication> 25 mg

<Medication> 25 mg

<Medication> 25 mg

<Medication> 25 mg

<Medication> 25 mg

<Medication> 25 mg

Cancel

Save & Exit

NEXT

PLAN DETAILS

Back to Recommendation Summary

Recommendation Details

Select & Save to Profile

Part A Details

Part B Details

Part D Details

Package Summary

Estimated Total Yearly OOP Costs	Monthly Premium	Yearly Premium	Medical Deductible	Rx Deductible	Doctors Covered
\$1,626	\$285/mo	\$285/yr	\$600/yr	\$600/yr	3 of 5

OOP cost is based on total premiums and covered drug costs for a calendar year. It does not include drugs that are not covered.

Services	This Plan Pays	Medigap Pays See Other Medigap Plans	You Pay
HOSPITALIZATION			
First 60 days	All but \$1364	\$1364 (Part A Deductible)	\$0
61st day - 90th day	All but \$341/day	\$341/day	\$0
91st day and after (60 reserve days*)	\$0	\$682/day	\$0
After reserve (additional 365 days)	\$0	100% of eligible expenses	\$0
Beyond the additional 365 days	\$0	\$0	ALL COSTS
SKILLED NURSING CARE			
First 20 days	All approved amounts	\$0	\$0
21st day through 100th day	All but \$179.50/day	Up to \$179.50/day	\$0
101st day and after	\$0	\$0	ALL COSTS
BLOOD			
Outpatient Hospital Coverage	\$0	100%	\$0
Inpatient Hospital Coverage	100%	\$0	\$0
HOSPICE			
Medicare's requirements must be met, including a doctor's certification of a terminal illness	All but very limited copayment/coinsurance, and • Outpatient drugs • Inpatient respite care	Medicare copayment/coinsurance	\$0

Back to Recommendation Summary

Recommendation Details

Select & Save to Profile

Plan Details

Part D Details

Bright Advantage Flex (PPO)

Estimated Total Yearly OOP Costs	Yearly OOP Max	Monthly Premium	Health Plan Premium	Health Plan Deductible	Rx Deductible	Covered Doctors
\$1,626	\$6,700 In-network	\$285/mo	\$285/yr	\$600/yr	\$600/yr	3 of 5

Optional Supplemental Benefits?

Additional Benefits and/or Reduced Copays?

Other Health Plan Deductibles?

Services	Copay	In-Network	Out-of-Network	Authorization	Limit	Referral
Preventive Care	\$0	\$0	\$0			
Wellness Programs (e.g., fitness, nursing hotline)	\$50	\$50	\$50			
Primary	\$0	\$0	\$20			
Specialist	\$0	\$0	\$20			
MEDICARE PART B DRUGS						
Outpatient Hospital Coverage		20%		N/A	N/A	N/A
Inpatient Hospital Coverage		20%		N/A	N/A	N/A
HOSPITAL CARE/URGENT CARE/EMERGENCY CARE						
Outpatient Hospital Coverage	\$300	\$300	\$35-\$250			
Inpatient Hospital Coverage	\$300	\$300	\$300			
Transportation	\$300	\$300	\$300			
Ground Ambulance	\$80	\$80	\$80			
Skilled Nursing Facility	\$80	\$80	\$80			
Urgent Care	\$80	\$80	\$80			
Emergency Care	\$0-45	\$80	\$80			
VISION						
Routine Eye Exam	\$0	\$50	\$150			
Other	\$50	\$0	\$10			
Contact Lenses	\$80	\$150	\$200			
Eyeglass Frames	\$80	\$200	\$300			
Eyeglass Lenses	\$0	\$200	\$300			
Eyeglasses (Frames and Lenses)	\$50	\$350	\$500			
Upgrades	N/A	N/A	N/A	N/A		
PREVENTIVE DENTAL						
Cleaning	\$80	\$150	\$200			
Fluoride Treatment	\$80	\$200	\$300			
Dental x-ray(s)	\$0	\$200	\$300			
Oral Exam	\$80	\$150	\$200			
COMPREHENSIVE DENTAL Not Covered						
MEDICAL EQUIPMENT/SUPPLIES						

Back to Recommendation Summary

Recommendation Details

Select & Save to Profile

Part A Details

Part B Details

Part D Details

Part D Details: Wellness Rx (PDP) 4802-174-000

Estimated Covered Yearly Rx Costs

Monthly Premium

Deductible

Prescriptions Covered

Estimated Covered Yearly Rx Costs

Monthly Premium

Deductible

Prescriptions Covered

The drug costs displayed are based on averaged costs in this zip code.

TIER COST OVERVIEW

	Initial Phase	Gap Phase	Catastrophic Phase
TIER 1: Preferred Generic	\$0	\$0	\$3.60 copay OR 5% (whichever costs more)
TIER 2: Generic	\$8	25% of retail	\$8.95 copay OR 5% (whichever costs more)
TIER 3: Preferred Brand	\$40	25% of retail	
TIER 4: Non-Preferred Brand	46% of retail	46% of retail	
TIER 5: Specialty	25% of retail	46% of retail	

ESTIMATED MONTHLY TOTALS

JAN	FEB	MARCH
\$0	\$0	\$0
APRIL	MAY	JUN
\$0	\$0	\$50
JUL	AUG	SEPT
\$50	\$50	\$300
OCT	NOV	DEC
\$300	\$300	\$50

ESTIMATED DRUG COSTS BY PHASE				YOU PAY				Authorization?	Limit	Step Therapy
Tier	Prescription	QTY	Refilled Every	Before Deductible	After Deductible	During Gap	Catastrophic Phase*			
TIER 1	Metformin HCL	90	30 days	\$0	\$0	\$0	\$0			
	Pantoprazole Sodium	90	30 days	\$2	\$5	\$5	\$2			
TIER 2	<Prescription>	90	30 days	\$0	\$0	\$300	\$3			
	<Prescription>	90	30 days	\$0	\$0	\$300	\$3			
TIER 4	<Prescription>	90	30 days	\$0	\$0	\$20	\$0			
	<Prescription>	90	30 days			NOT COVERED				

NOTE:

- I was *not* the Visual Designer on this project. Trusty had an in-house Graphic/Visual Designer who did all the branding and visual design.
- My role on the Plan Details was focused on Information Design, figuring out how to fit an enormous amount of detail into a consumable screen.

- The app pulled data from multiple 3rd party sources so that brokers could find & compare plans
- The interface was designed to display extremely complex information in a consumable way

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6 COMMITTEE FOR CHILDREN: LARGE SCALE SITE REARCHITECTING

COMMITTEE FOR CHILDREN: LARGE-SCALE SITE REDESIGN

Project Value & Impact

CFC is an education-focused nonprofit that created the *Second Step Program*, which teaches emotional awareness to children K-12. They had an outdated site that had been created largely by a software development team, and the only design input was from a graphic designer & instructional designers.

This project modernized the entire marketing website, as well as the password-protected site that provides educators with course materials. The educator site was taken from static & content-based to a fully interactive teaching tool.

Project Description

The CFC organization recognized the need to move off their existing tech stack, and saw the opportunity to have the site redesigned in the process. They brought me on board to rearchitect this very large website, which caters to multiple user groups, and streamline everything from their content to their IA, to their educator tools.

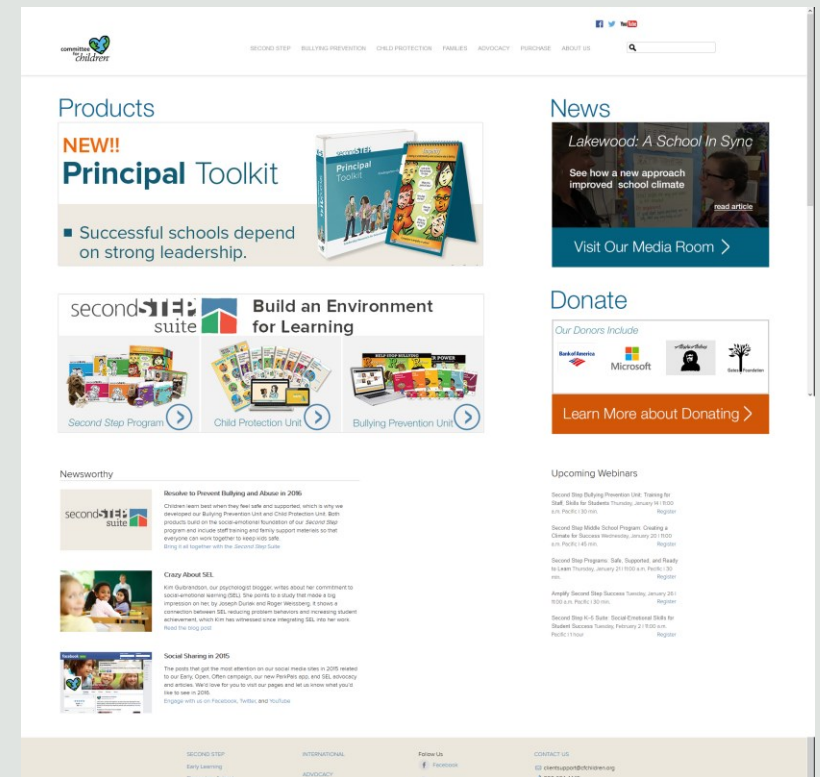
Project Scope

- Rearchitect the site so that it was streamlined & very usable for busy educators & administrators.
- Provide modernized UX & UI

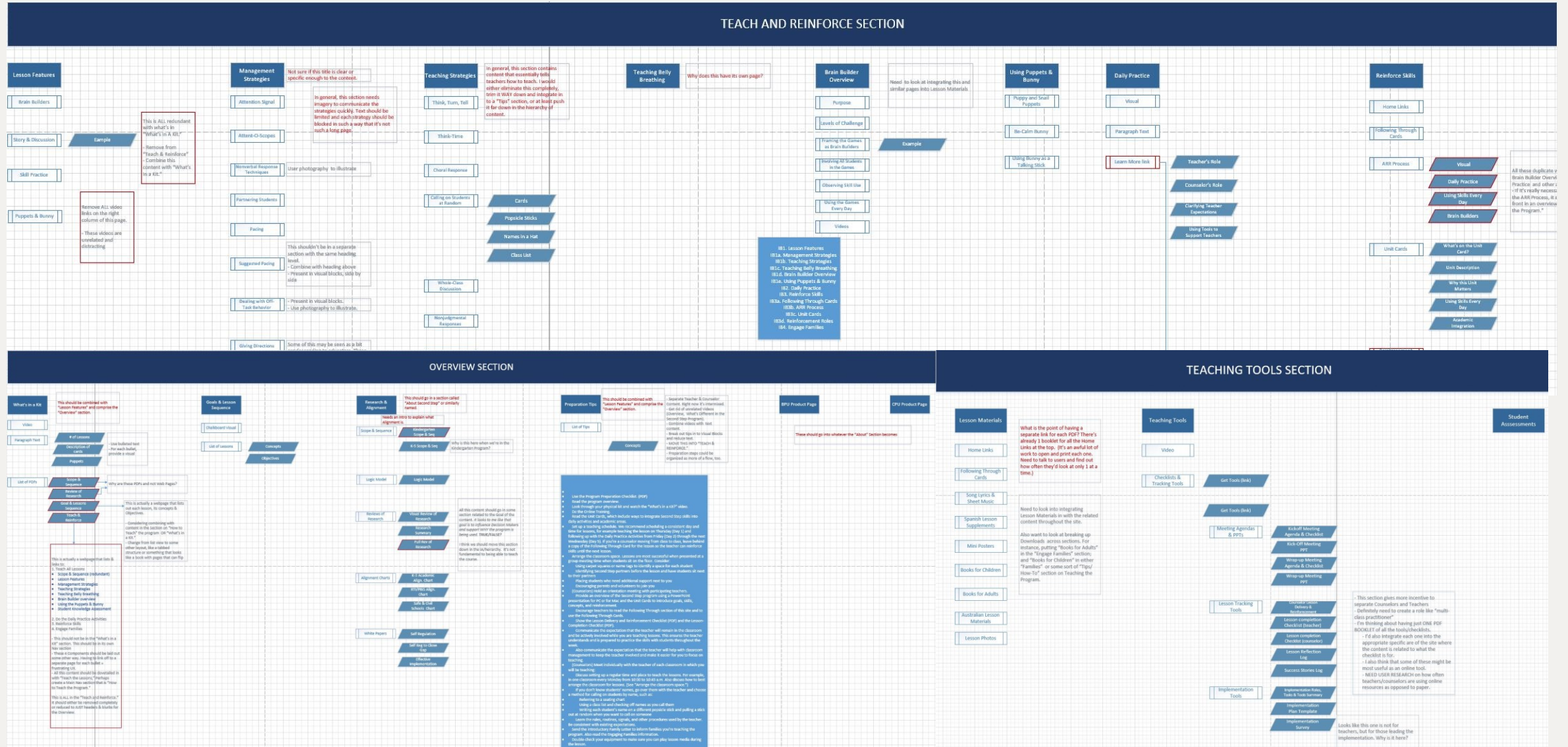
Contributions

As sole Design Consultant, I:

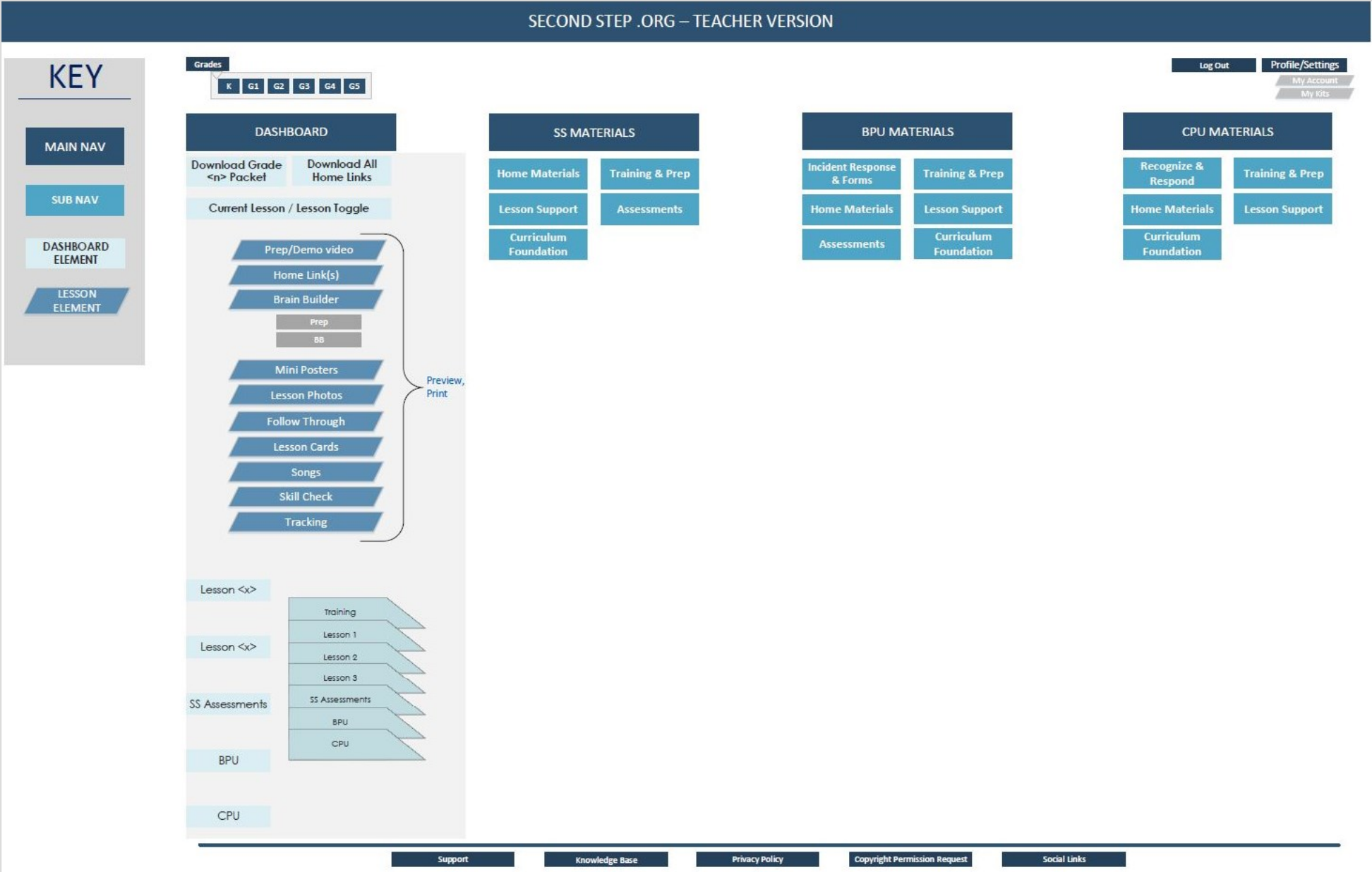
- Conducted user research & competitive analysis
- Documented all existing site & program content and de-duped all content across site
- Created new, streamlined IA that significantly reduced site size
- Create new UX that grouped content by Lesson & Unit (e.g., based on end user's mental model & usage of the content)
- Turned PDF resource library into interactive webpages where possible
- Created user flows requirements docs, research docs, wireframes, and functional specs



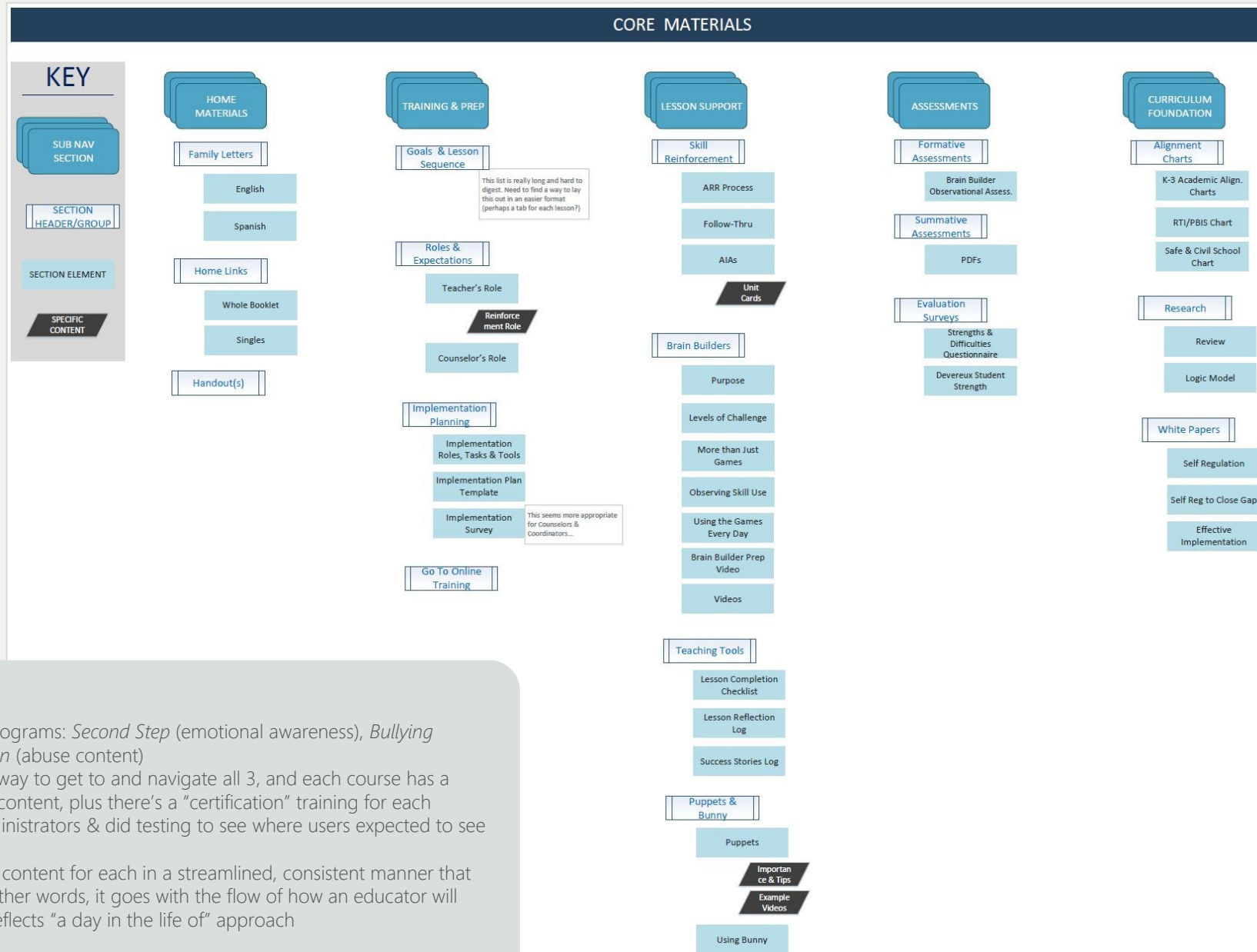
OLD INFORMATION ARCHITECTURE



NEW INFORMATION ARCHITECTURE



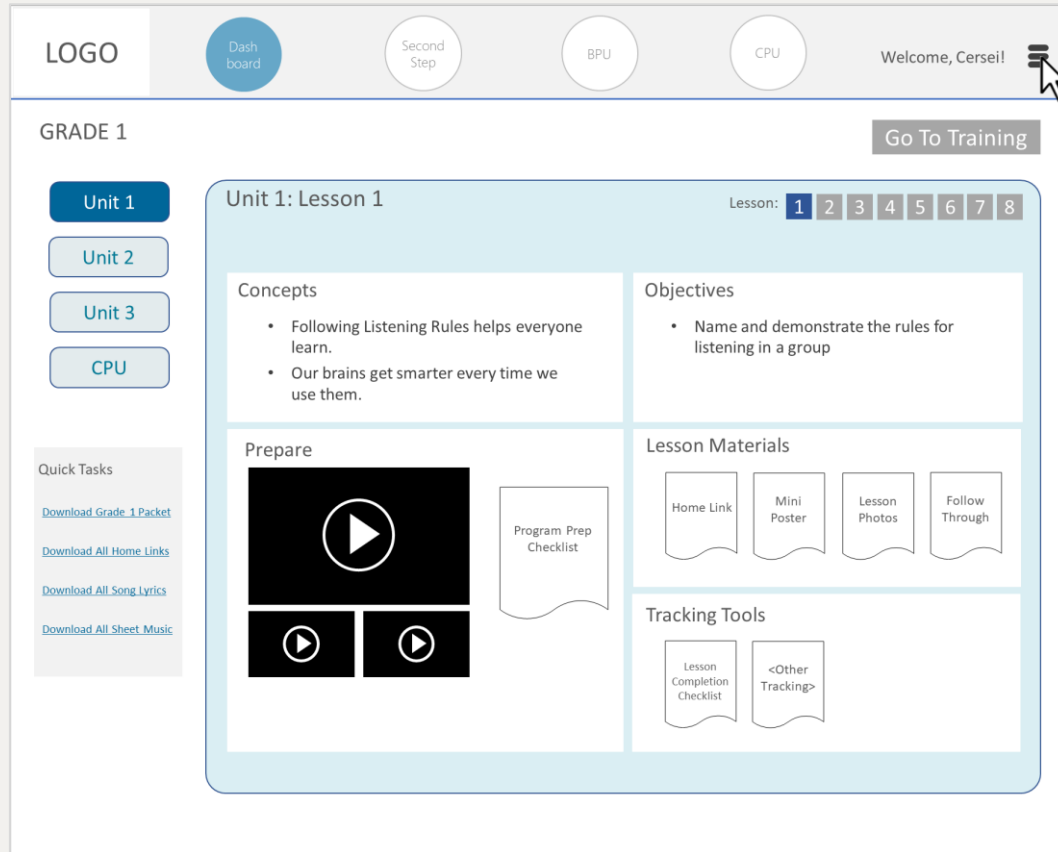
NEW INFORMATION ARCHITECTURE



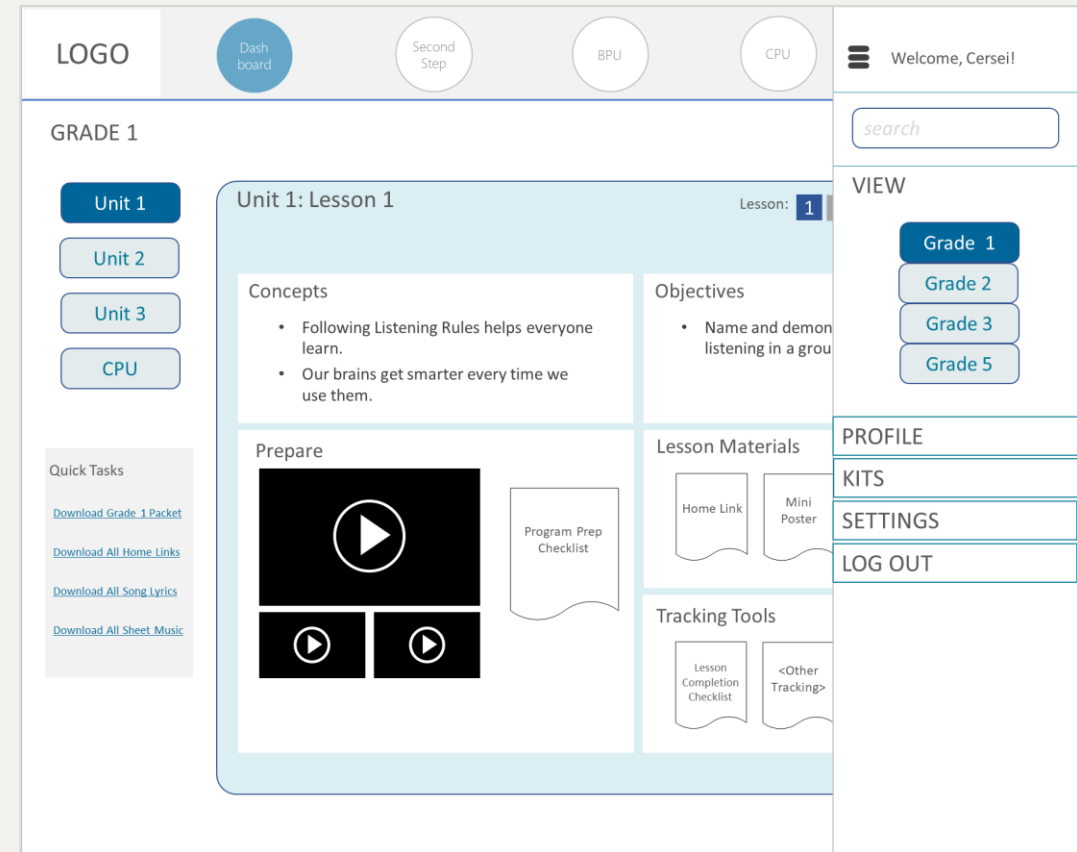
Design Rationale:

- Second Step has 3 separate Programs: *Second Step* (emotional awareness), *Bullying Prevention*, and *Child Protection* (abuse content)
 - Educators need a clean way to get to and navigate all 3, and each course has a wealth of supplemental content, plus there's a "certification" training for each
- I interviewed educators & administrators & did testing to see where users expected to see which pieces of content
- I chunked the courses and the content for each in a streamlined, consistent manner that follows the Lesson Plans—in other words, it goes with the flow of how an educator will actually use the content and reflects "a day in the life of" approach

ROUGH WIREFRAMES: Educator Dashboard



- The Dashboard has selection buttons for each Lesson, as well as BPU & CPU.
- There are Quick Tasks at the bottom for easy access to downloads.
- The main body of the Dashboard is **dynamic**. It will always show the Concept/Goals & Objectives. The other sections of the Main Body will display Lesson Materials, tools, prep videos and other lesson-specific material *as appropriate*.

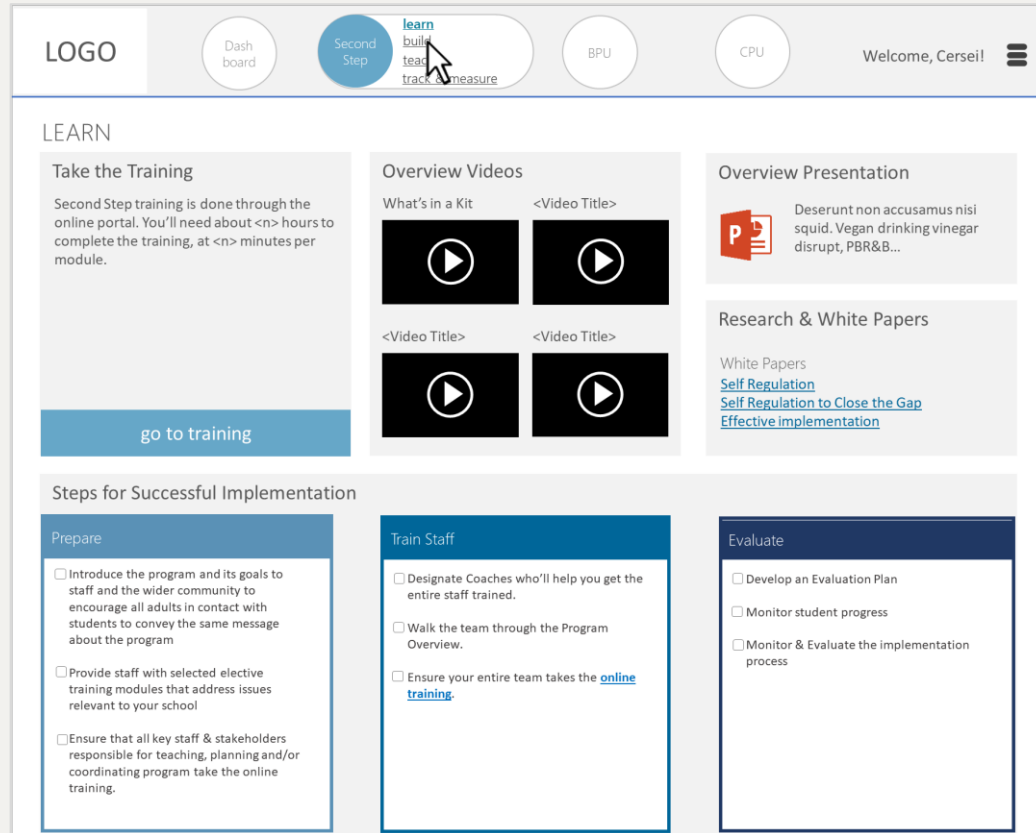


The hamburger menu houses Secondary & Tertiary tasks that would otherwise clutter up the Main Nav.

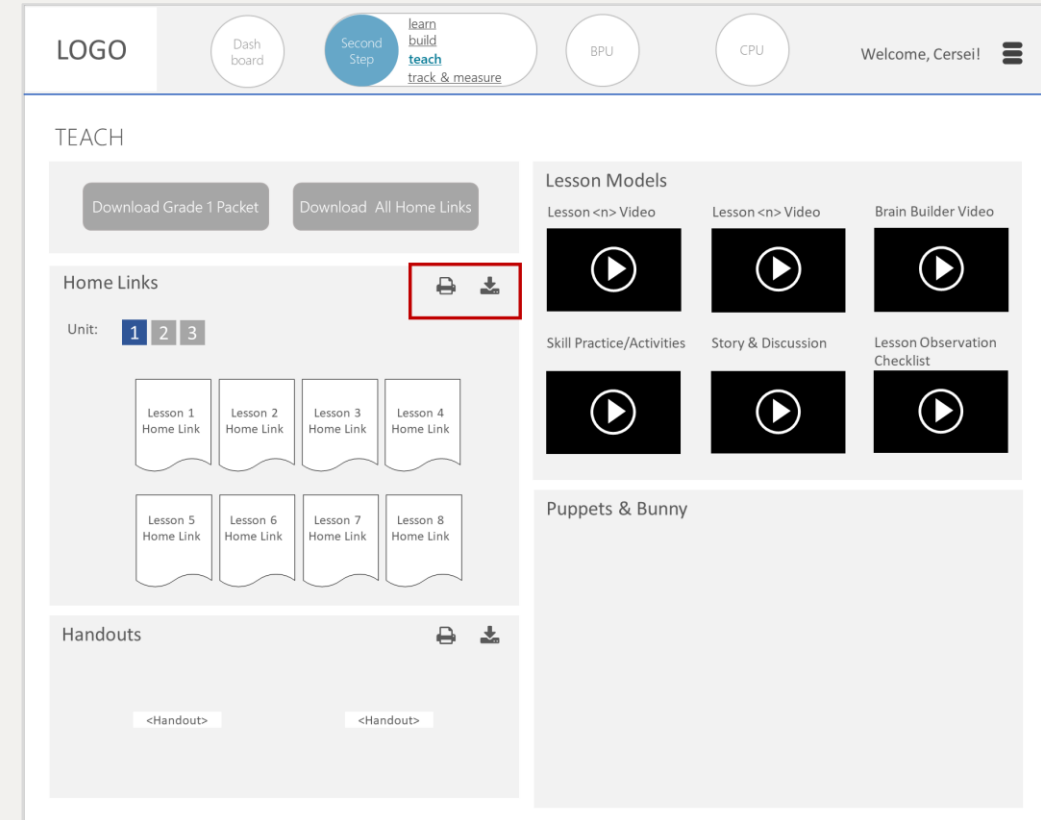
Design Rationale:

- In addition to having 3 programs at the top level, I also had to have an affordance for Grade Levels (which each have different content)
- I wanted the educators to have a Dashboard View that was app-like, which followed their progress & could show them everything relevant to a given lesson in one glance-able place, based on input from users I talked with

ROUGH WIREFRAMES: Educator Dashboard



- The "Learn" section has been trimmed down to include only
- What is needed on an ongoing basis
 - What isn't included in the walkthrough or training.



There are persistent PRINT & DOWNLOAD buttons for each document section. Clicking either will apply the Print or Download action to ALL documents in the section.

Hovering over any document thumbnail will invoke the PRINT & DOWNLOAD icons for that specific document.

NOTE: These paradigms are consistent throughout the site UI.

Design Rationale:

- In addition to having 3 programs at the top level, I also had to have an affordance for Grade Levels (which each have different content)
- I wanted the educators to have a Dashboard View that was app-like, which followed their progress & could show them everything relevant to a given lesson in one glance-able place, based on input from users I talked with

ROUGH WIREFRAMES: Lesson Materials

LOGO

GRADES

Welcome, Jane Smith

dashboard

second step

bullying prevention

child protection

GO TO TRAINING

TRAINING & PREP

Unit 1Unit 2Unit 3

Goals & Sequence

Lesson	Concepts	Objectives
1	- Following Listening Rules helps everyone learn. - Our brains get smarter every time we use them.	Name and demonstrate the rules for listening in a group
2	- Focusing attention involves using eyes, ears, and brain. - You can focus your attention just by thinking about it, and the more you do it, the better you get at it. - Using self-talk helps you focus attention.	- Name and demonstrate the Listening Rules - Demonstrate attention skills in the context of a game
3	- Listening and following directions are important skills for learning. - Repeating directions helps you remember them. - Following directions involves your eyes, ears, and brain.	Demonstrate listening and following directions within the context of a game
4	- Self-talk means talking to yourself out loud in a quiet voice or inside your head. - Self-talk helps you focus and maintain attention.	Demonstrate self-talk for remembering directions in the context of a drawing game
5	- If you can name your own feelings, it will help you figure out how other people feel. - All feelings are natural. Some feelings are comfortable, and some are uncomfortable. - Physical clues can help you identify others' feelings.	- Name happy and sad when presented with physical clues Touching Rule, and Never Keep Secrets Rule - Identify that happy is a comfortable feeling and sad is an uncomfortable feeling - Identify a variety of feelings displayed in response to scenarios
6	To ask for what you need or want, face the person you are asking and use a respectful voice.	Demonstrate asking for what they need or want during skill-practice activities

Roles & Expectations

Teacher Role

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Counselor Role

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Planning Tools

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Kindergarten-Grade 5 Program Preparation Checklist

- Read the K-5 Teaching Guide Program Overview section (at www.secondstep.org)
- Examine the curriculum kit materials
- Complete the online training
- Read the Unit 1 card
- Establish a teaching schedule
- Arrange classroom space
- Send the Introductory Family Letter
- Check equipment

Program Preparation Checklist

LOGO

GRADES

Welcome, Jane Smith

dashboard

second step

bullying prevention

child protection

LESSON SUPPORT

Skill Reinforcement

The ARR Process

Anticipate

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Reinforce

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Reflect

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Follow-through

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Unit Cards

Brain Builders

Prep & Examples

Prep Video

Purpose

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Levels of Challenge

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More than Just Games

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Observing Skill Use

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Using the Games Every Day

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FUNCTIONAL SPEC SNIPPET

SECOND STEP TEACHER SITE FUNCTIONAL SPECIFICATION

Introduction

This document describes the updated structure, user experience, and functionality of the Second Step site, based on the V5 redesign. This spec specifically addresses the Teacher version of the website. While the current version includes other user types as well, this redesign has broken out Teachers, Counselors, Program Coordinators and Families. This has been done in light of the significantly different user needs for each user type, as well as the need for significantly simpler site navigation.

REQUIREMENT	QUESTIONS/COMMENTS
The site will be broken up into 2 main overarching views: - Landing/Not logged in - Logged in	
The Landing and Logged In views will both be responsive.	

Landing Site

In order to provide users with an improved UX, and to take steps toward decoupling SS and cfchildren.org, a new Landing Site is being designed.

REQUIREMENT	QUESTIONS/COMMENTS
The Landing Site will host marketing content for each product, including: - Second Step - Bullying Prevention - Child Protection	
The Landing Site will have the following links in its Main Navigation: - Home - Second Step - Bullying Prevention - Child Protection - Register - Sign In	
These links will be persistent across the whole Landing Site.	
The site logo acts as the Home link, which goes to the site's Landing Page	
Clicking Second Step invokes the Product Page for that product. (Design & Content TBD.)	
Clicking Bullying Prevention invokes the Product Page for that product. (Design & Content TBD.)	
Clicking Child Protection invokes the Product Page for that product. (Design & Content TBD.)	
Clicking Sign In invokes the login flyout panel.	
Clicking Register launches the Registration Wizard.	

SECONDSTEP.ORG4

SECOND STEP TEACHER SITE FUNCTIONAL SPECIFICATION

Register

This section describes the registration process for domestic schools.

REQUIREMENT	QUESTIONS/COMMENTS
Upon clicking Register, a dialog displays, asking the user if they have a PAK. Options: - Yes (I'll register now) - No (I'll register later).	
Clicking No returns the user to the Landing Site on whichever page they were on previously.	
Each page of the Registration flow will include a header (Register)	
A progress indicator will display on each page (excluding the dialog) of the Registration flow.	
The first page of the Registration Wizard includes 2 dropdowns: - Select Your Country - What Type of Organization?	
The Country selection dropdown will contain any countries appropriate for the list.	
The Organization selection dropdown will include Public Schools and any other organization appropriate for the list.	
NEITHER dropdown will have a default selection.	
Default field text: - Select Country - Select Organization Type	
Selecting any country outside of the US will fork the user to another flow (TBD).	
Selecting any organization other than public school will fork the user to another flow (TBD).	
Once the user has made selections, they will advance to the next screen: Enter PAK.	
The PAK entry screen includes: - PAK entry field - Default text: Enter Product Activation Key - Add another Product Activation Key icon and text - Next button	
The ADD button will be disabled by default.	
Entering a valid PAK will enable the ADD button.	
The NEXT button will be disabled by default.	
Entering a valid PAK will enable the NEXT button.	
Upon entering letters/numbers in the PAK field that are the appropriate length, the system will check to validate/invalidate.	
If the PAK is valid, a visual indicator will display to indicate it's valid.	
If the PAK's invalid, a visual indicator will display to indicate it's invalid.	

SECONDSTEP.ORG5