Designs by Aradia C

A Sampling Of:

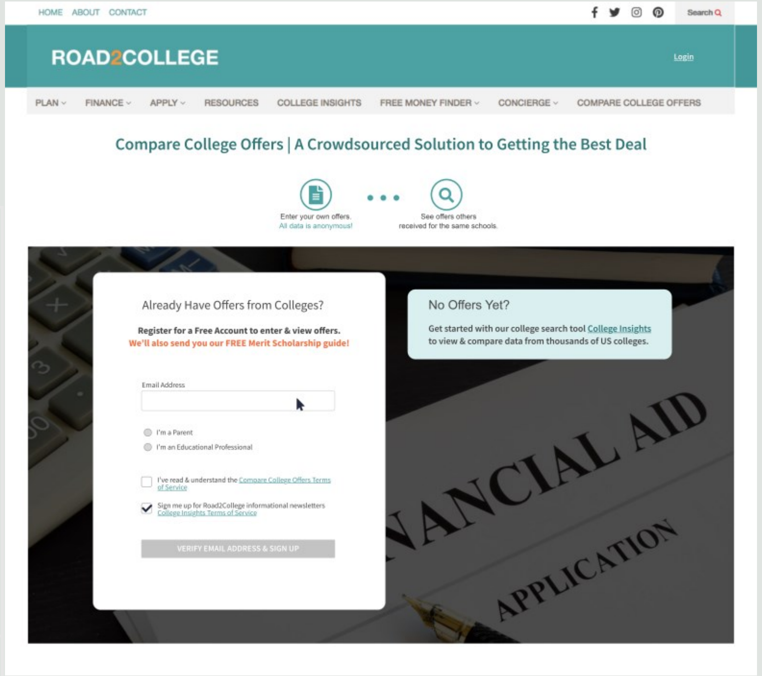
- UX Strategy
- User Research
- Information Architecture
- UX Design
- Service Design

IA | UX | Research

The DesigNinja

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.

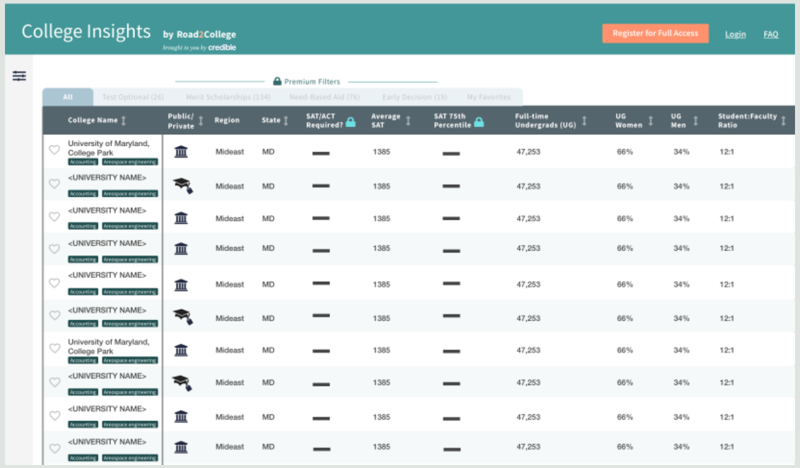
Project Scope

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

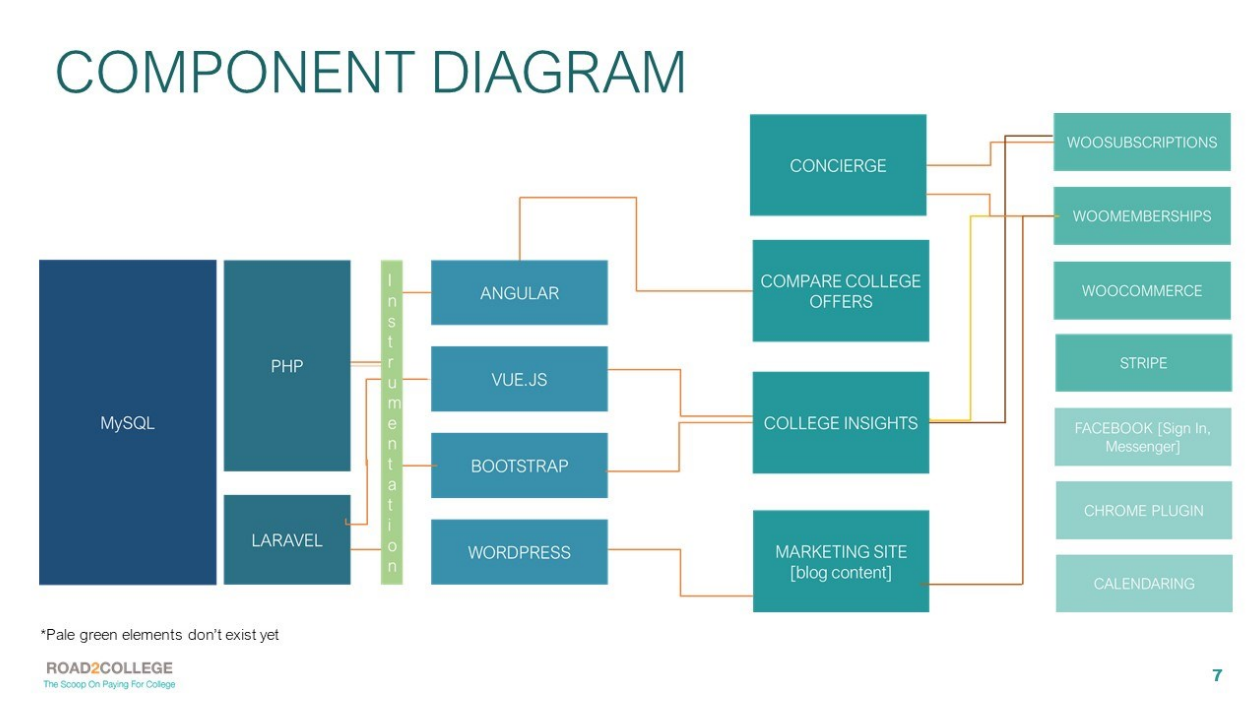
Contributions

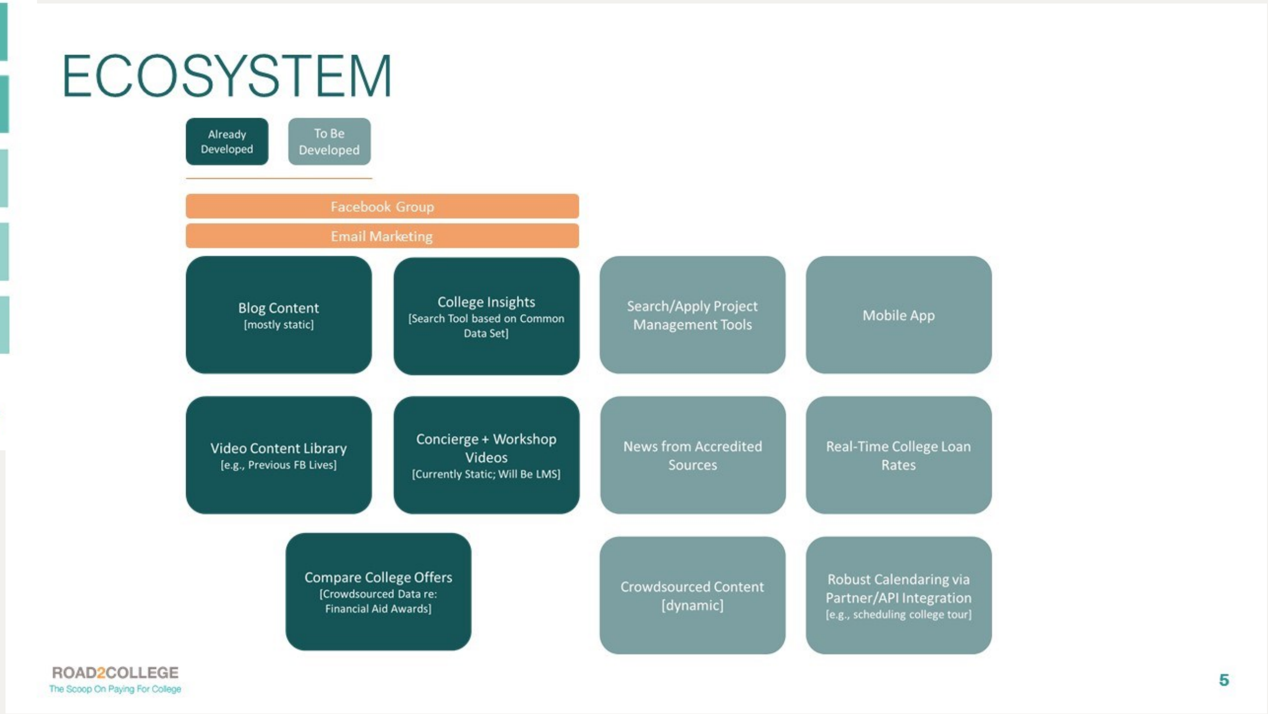
As sole Design Consultant, I:

- 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

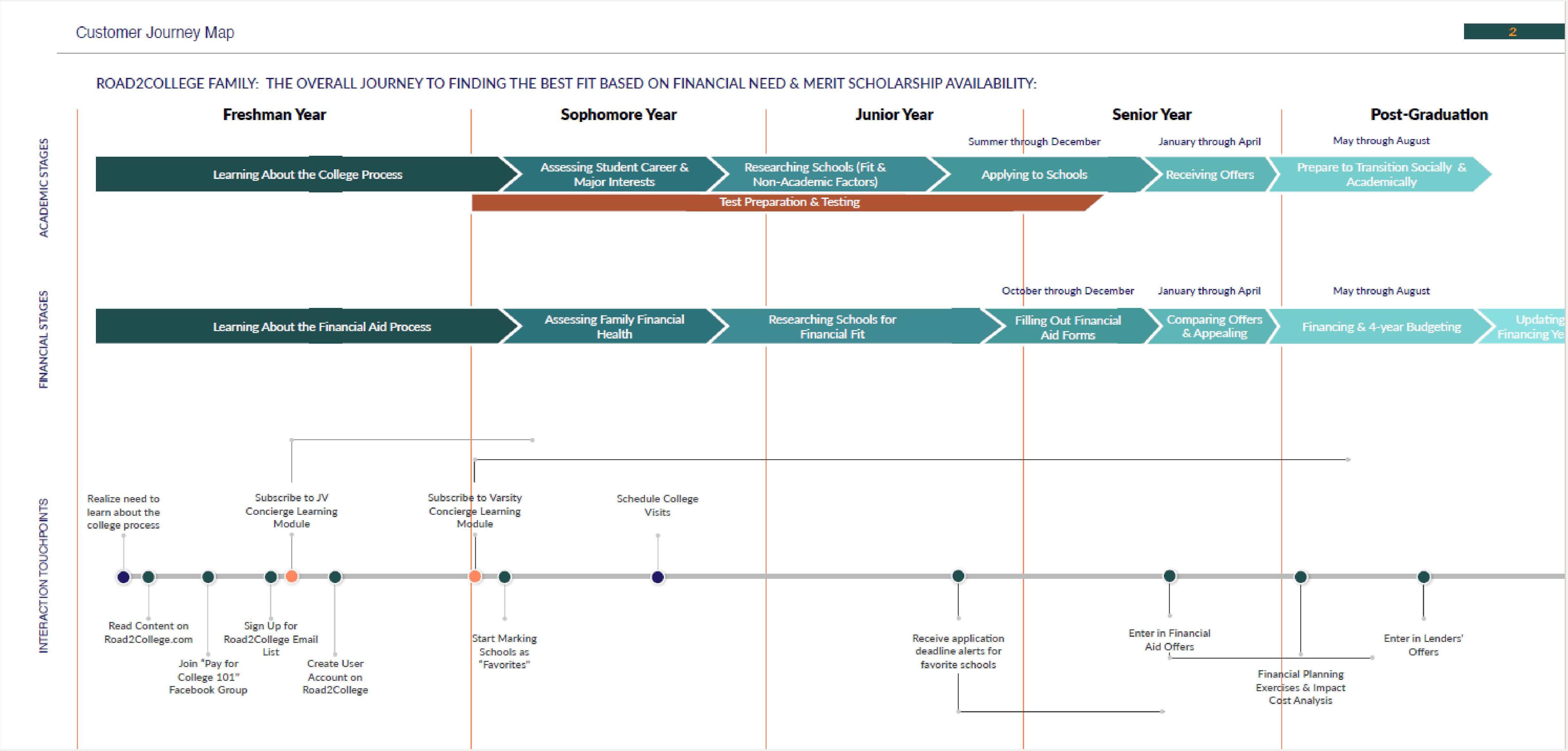


WEBSITE & SYSTEM ARCHITECTURE

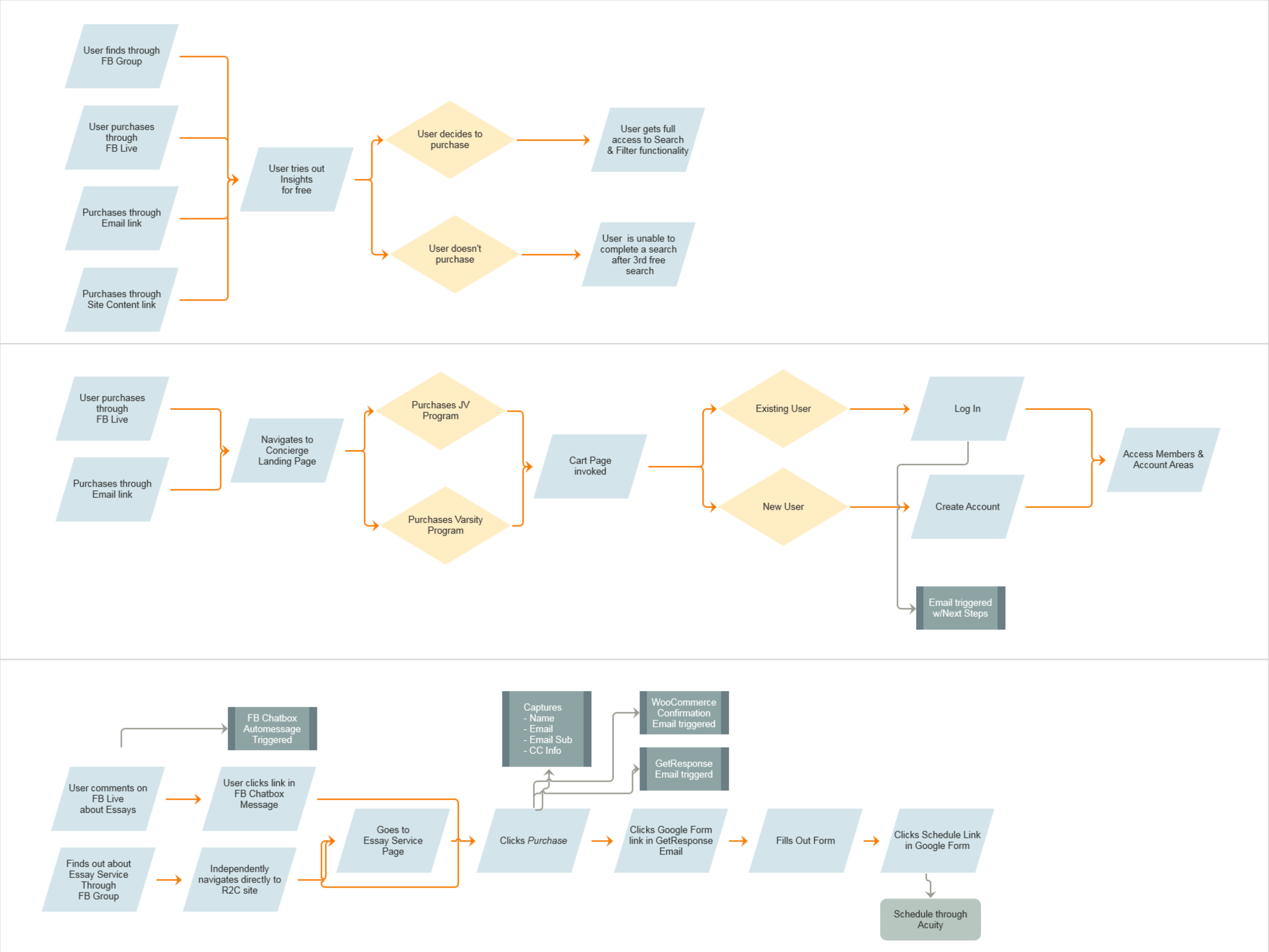




CUSTOMER JOURNEY MAP



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

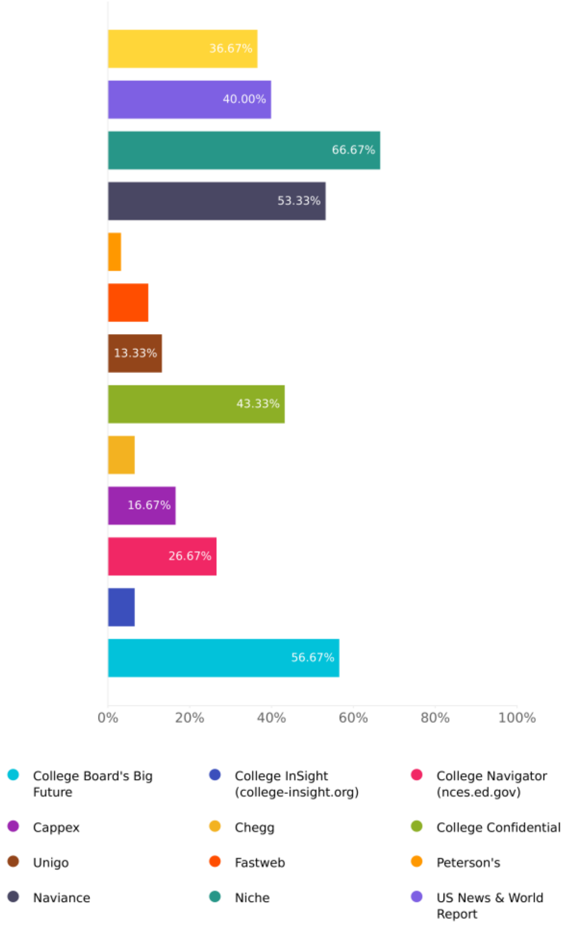
6
Moderated Usability Studies On New Design

Outside of Road2College, which online resources are you using in your college search?
Answered: 30 Skipped: 1

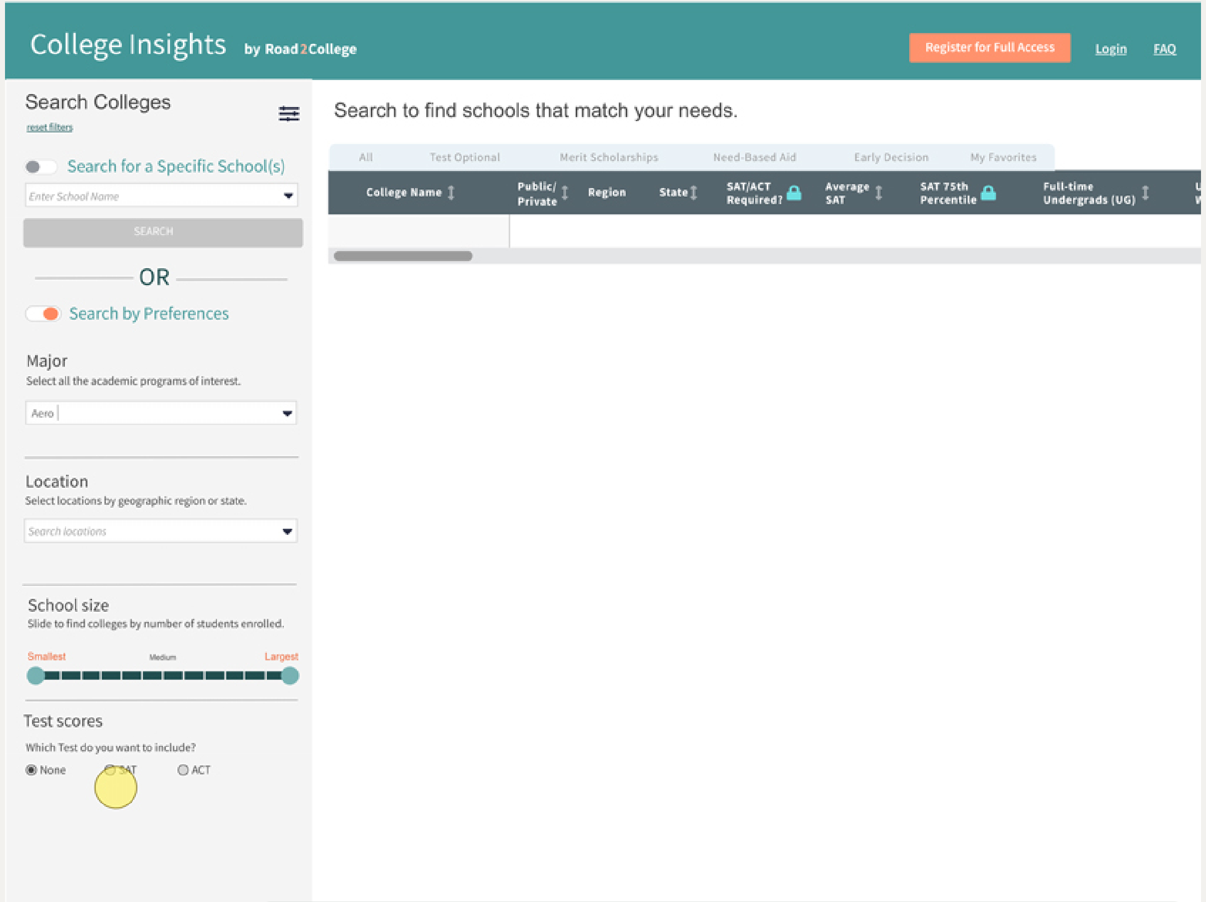
Choices	Response percent	Response count
College Board's Big Future	56.67%	17
College InSight (college-insight.org)	6.67%	2
College Navigator (nces.ed.gov)	26.67%	8
Cappex	16.67%	5
Chegg	6.67%	2
College Confidential	43.33%	13
Unigo	13.33%	4
Fastweb	10.00%	3
Peterson's	3.33%	1
Naviance	53.33%	16
Niche	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 losts 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



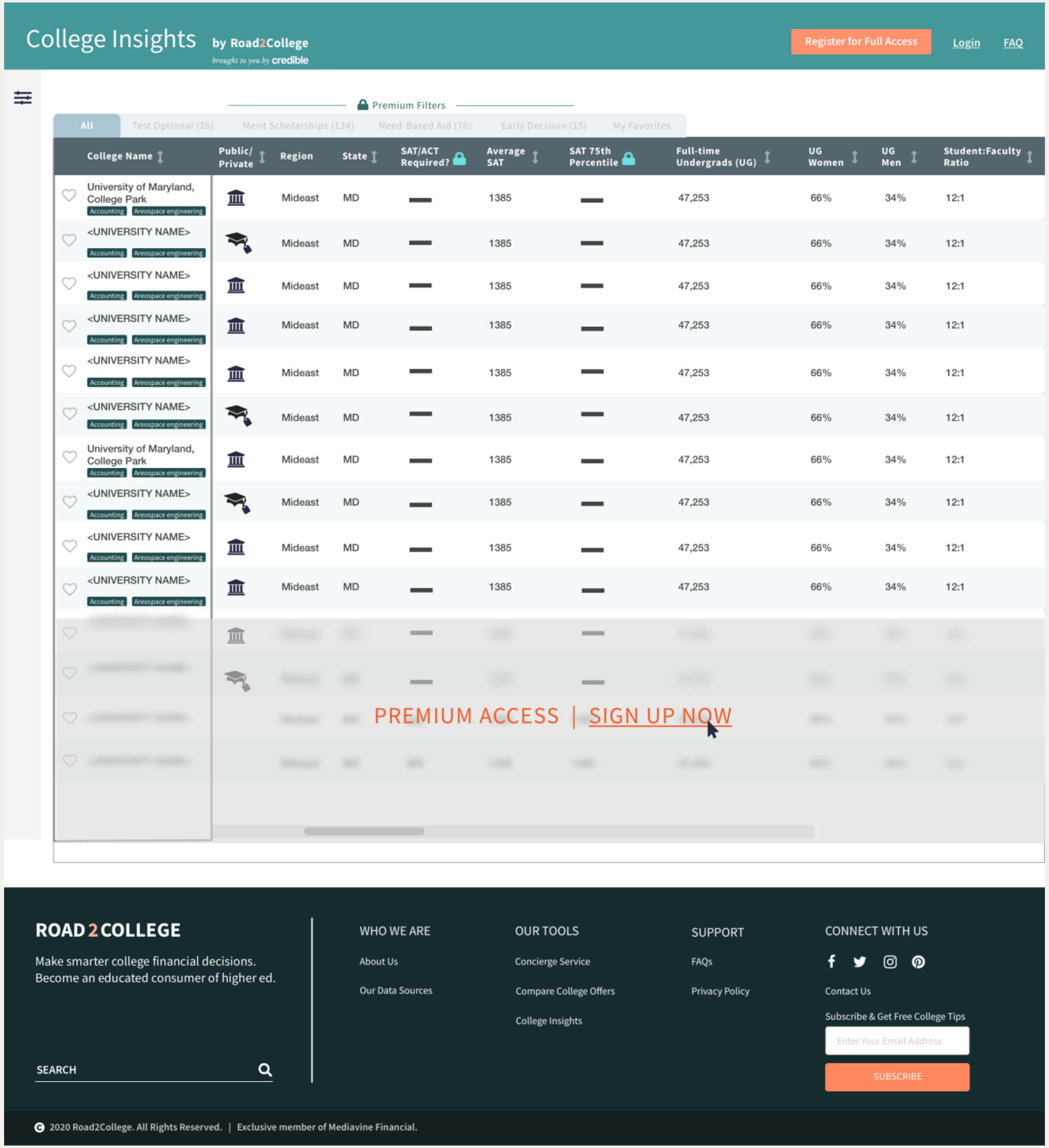
COLLEGE FIT SEARCH



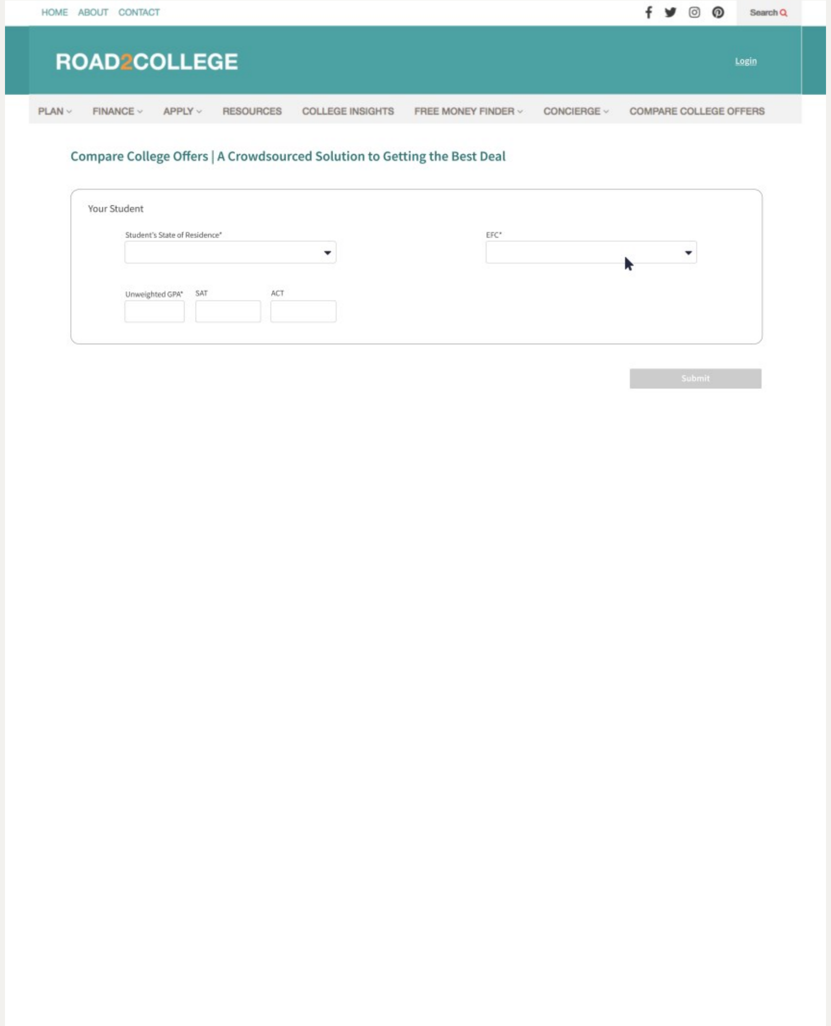
SEARCH

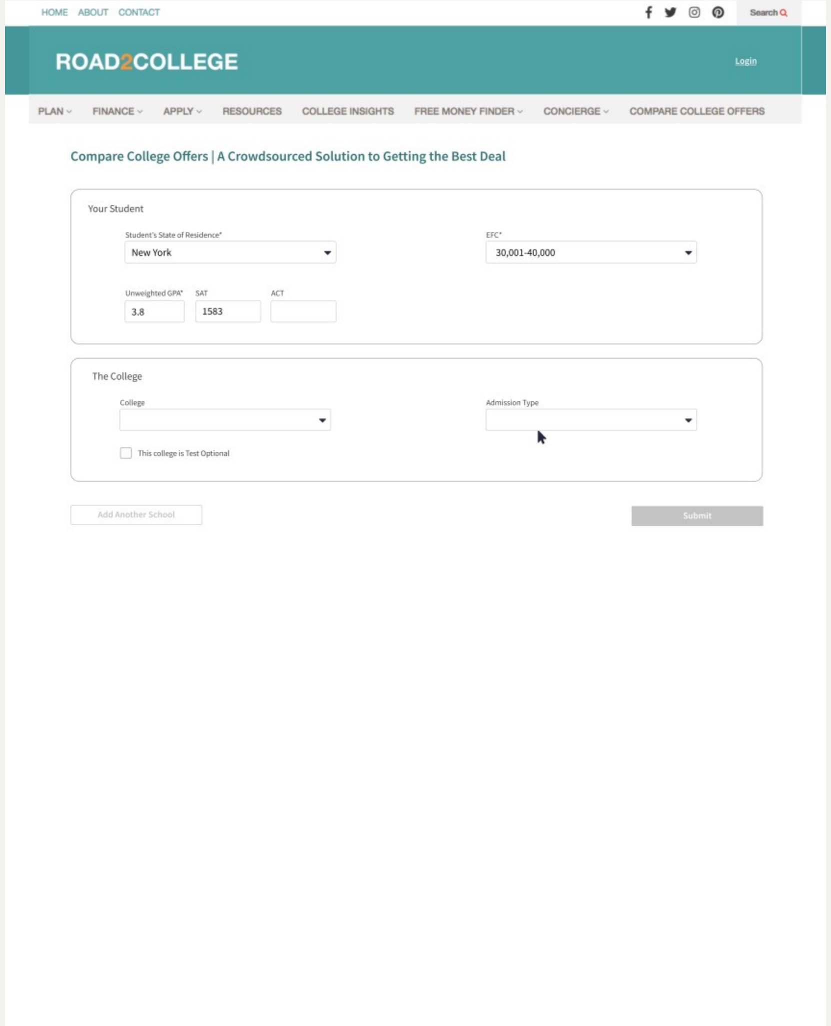
Design Rationale:

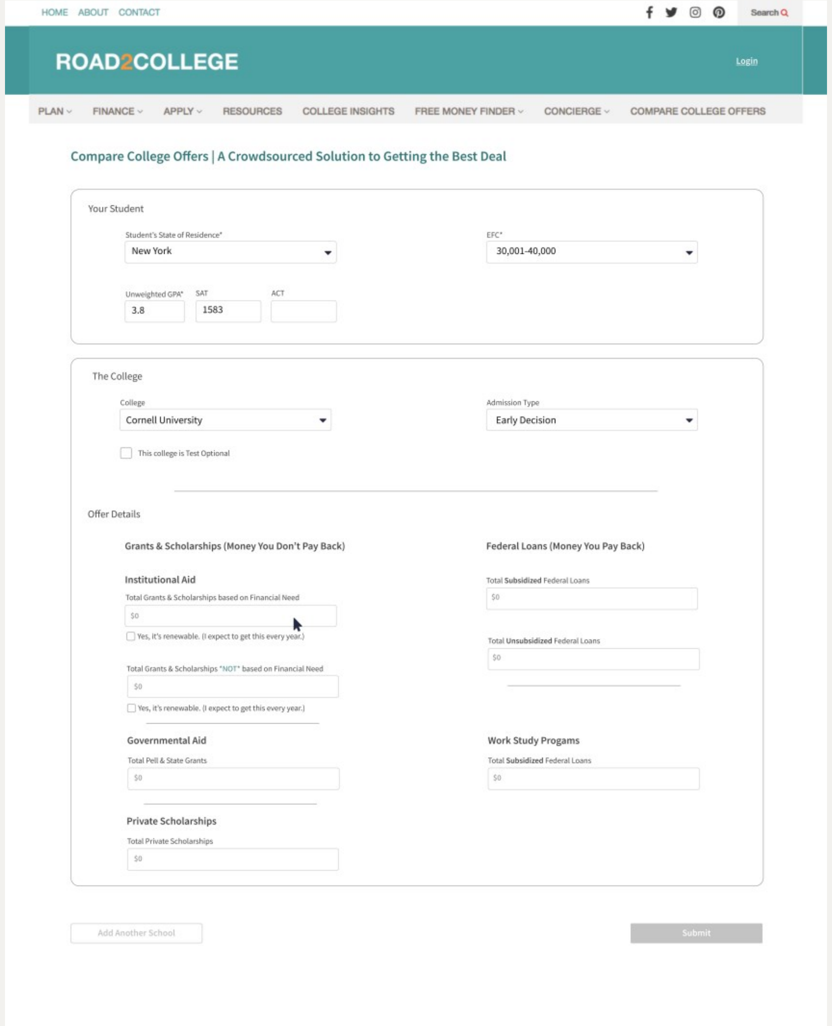
- R2C started out as a massive spreadsheet that the CEO shared via email with her Newsletter subscribers
- The Web App v1 went out as essentially a digital version of that same spreadsheet, and was riddled with usability issues
- I devised a way for users to pare down what data showed up for them, and 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



COMPARE COLLEGE OFFERS

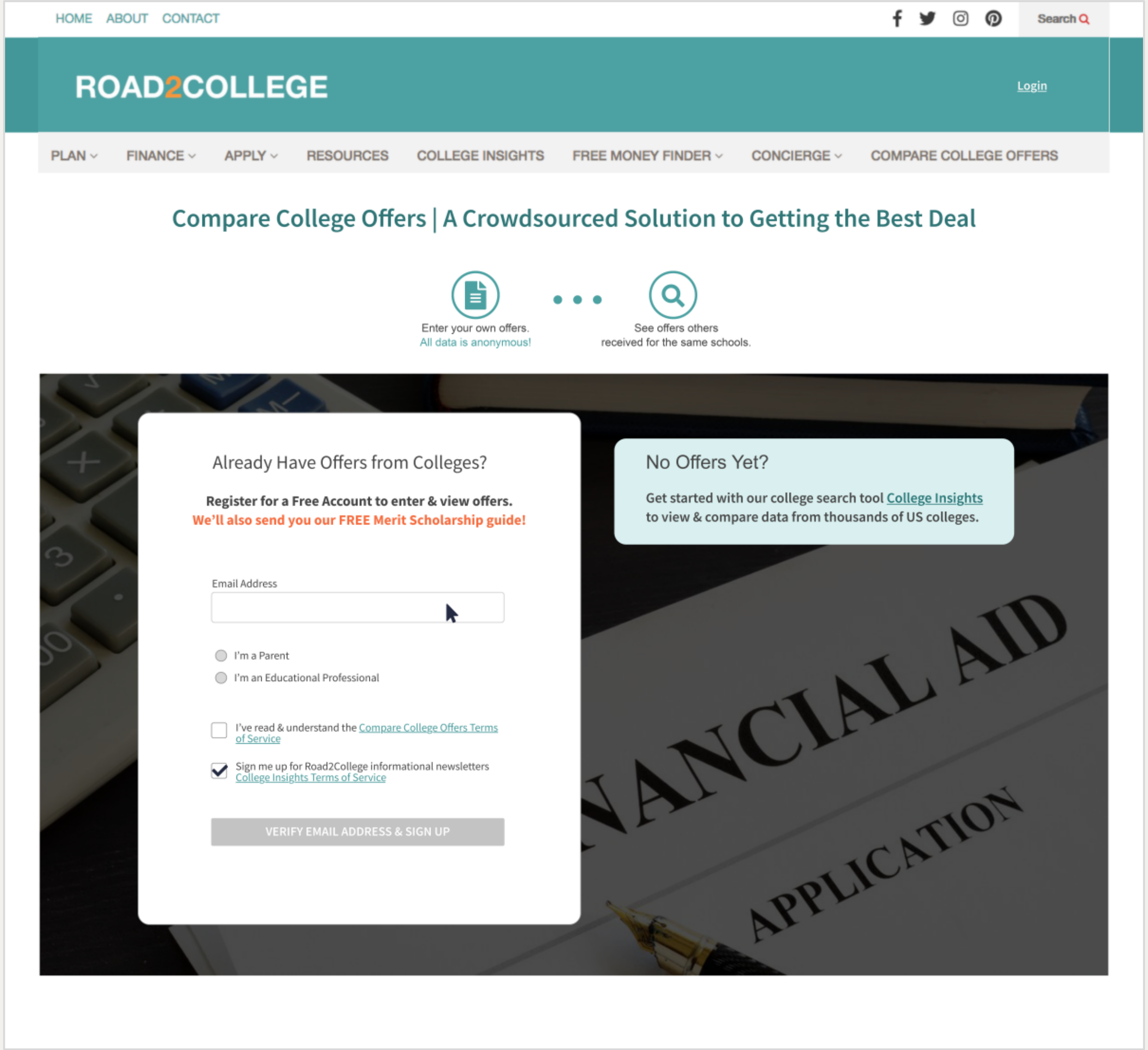


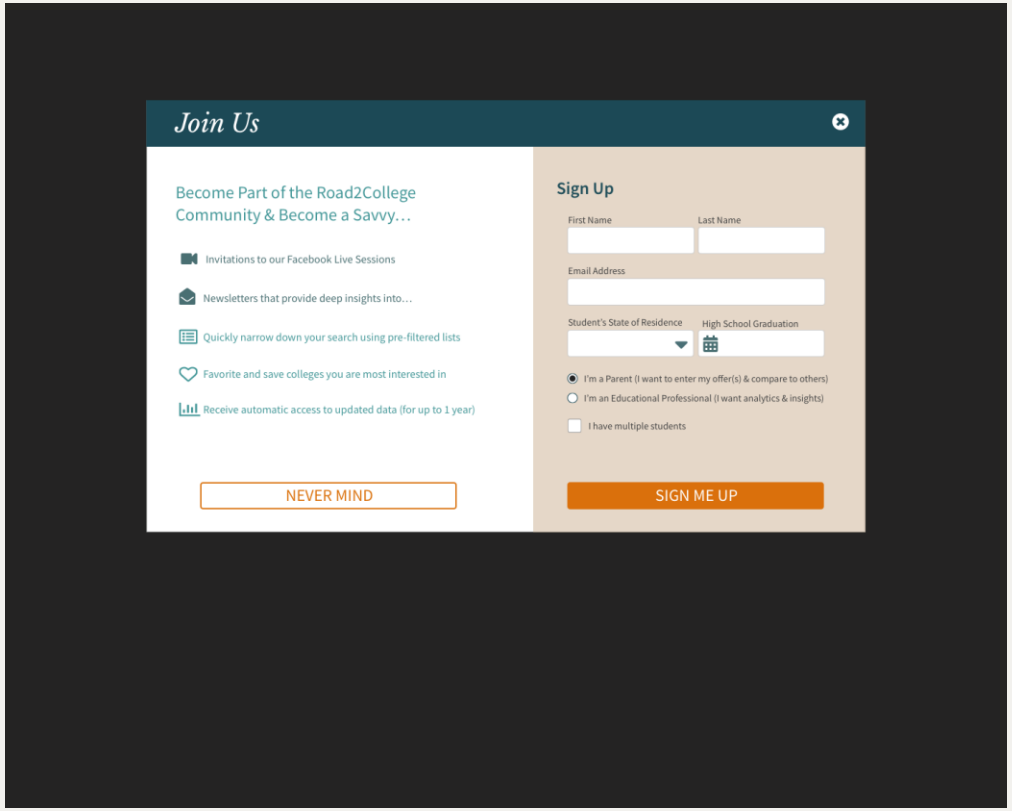




Compare College Offers enables college hopefuls & their parents to enter data re: their financial aid offers. It's 2 sided – it crowdsources comparative data, and displays that crowdsourced data through the Insights app.

ACCOUNT CREATION EXPLORATIONS





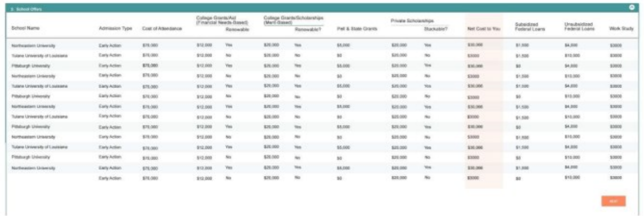
FEATURE & FUNCTIONAL SPEC SAMPLES

FACET	FEATURE AREA	REQUIREMENTS	PRIORITY
PRODUCTS		Subsriptions & one-time pruchases can be bundled	1
		Purchasing or Subscribing invokes 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., Concierge)	1
		Users can see purchase/subscription history in one place	2
		Users can access any purchase-related content through their Profile (Concierge 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/Forgot Password flow)	1
		Users can change their answers to all Onboarding Questions	2
		Users can subscribe to R2C email newsletters	1
		Users can unsubcribe from newsletters	1
		Users can subscribe to a range of notifications (live events, facebook live)	2
		Users can like/subscribe 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~~
	ONBOARDING [Account & Insights Config]	Graduation Year ~~Any purchase of anything should initiate the Account Creation Process~~	~~1~~
		what their needs are: ~~Integrate Facebook Sign Up~~	2 ~~2~~
		whether high school or college	2
		Interests (sports, military, performing arts) Users need robust onboarding	2 2
		Looking for money (scholarships, need-based aid)	2 2
TOOLS	INSIGHTS STABILIZATION & IMPROVEMENT	Automatic Table config/customization based on onboarding	2
		User customization of Table	3
		Chunking Columns into Sections	3
	FAVORITES LIST [in USER PROFILE]	Users can Rank Favorites	3
		Users can Order/Reorder Favorites list	3
		Users Add comments to Faves	3
		Users can create a Task List	3
		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 Faves from individual College Site	3
		Provide Recommended Classifications for selected/saved	3
		Recommended Schools	3
	PROJECT MGMT & TASK TRACKING		
		Users can upload images and video of colleges	4
		Users can create a To-Do List	4
		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.



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: *Need*-Based Offer Data Available	Column Header text TBD
	Add a New Column: *Merit*-Based Offer Data Available	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: *Cost of Attendance (Without Aid Awards)*	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.

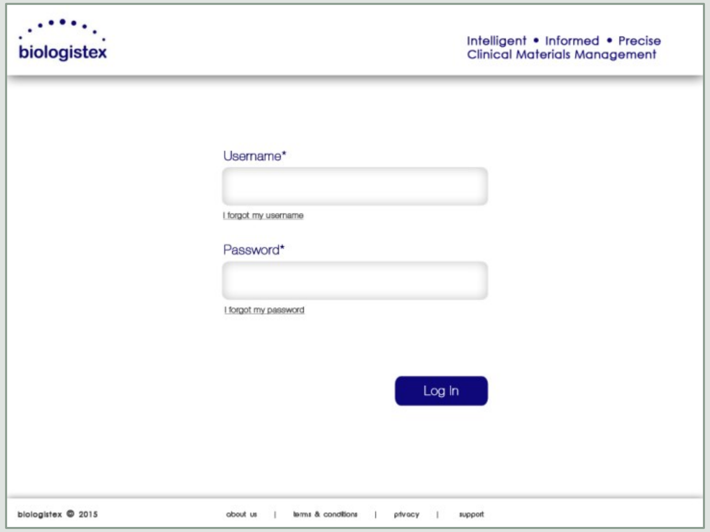
Project Scope

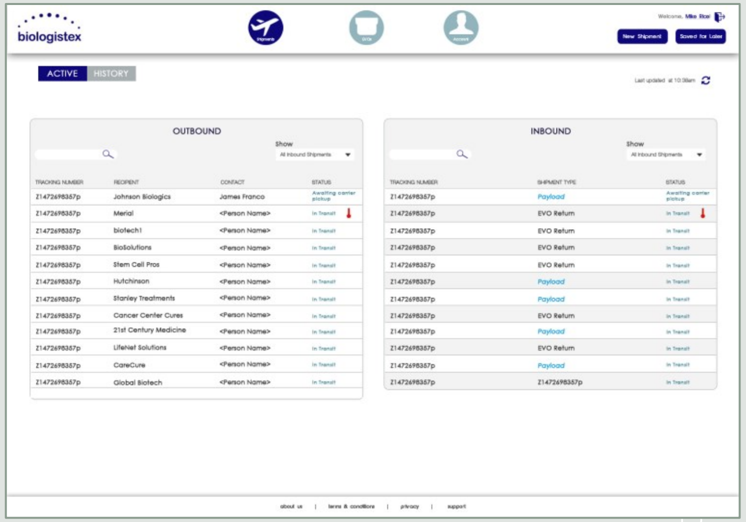
The project scope started out as a simple "reskin" of a site they leveraged from their telemetry partner. It ended up being a full-scale design & development project of a brand new, interactive Web App that enabled multiple highly-differentiated user groups to create, track, and manage biomass shipments.

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

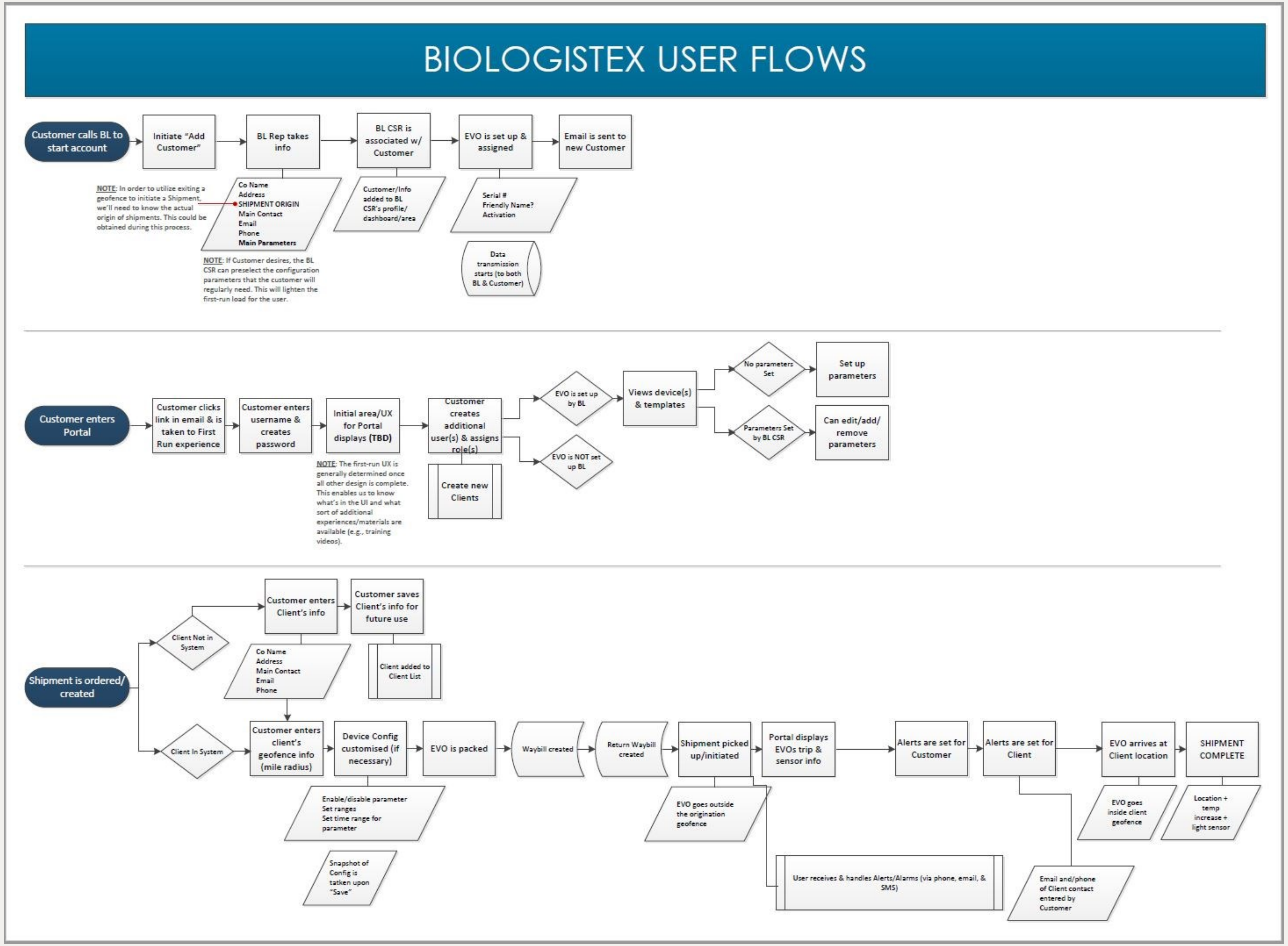
2
Weeks of Initial
Due Diligence
Business Analysis

2
Weeks of Intensive
Design-Led
Product Strategy
Planning

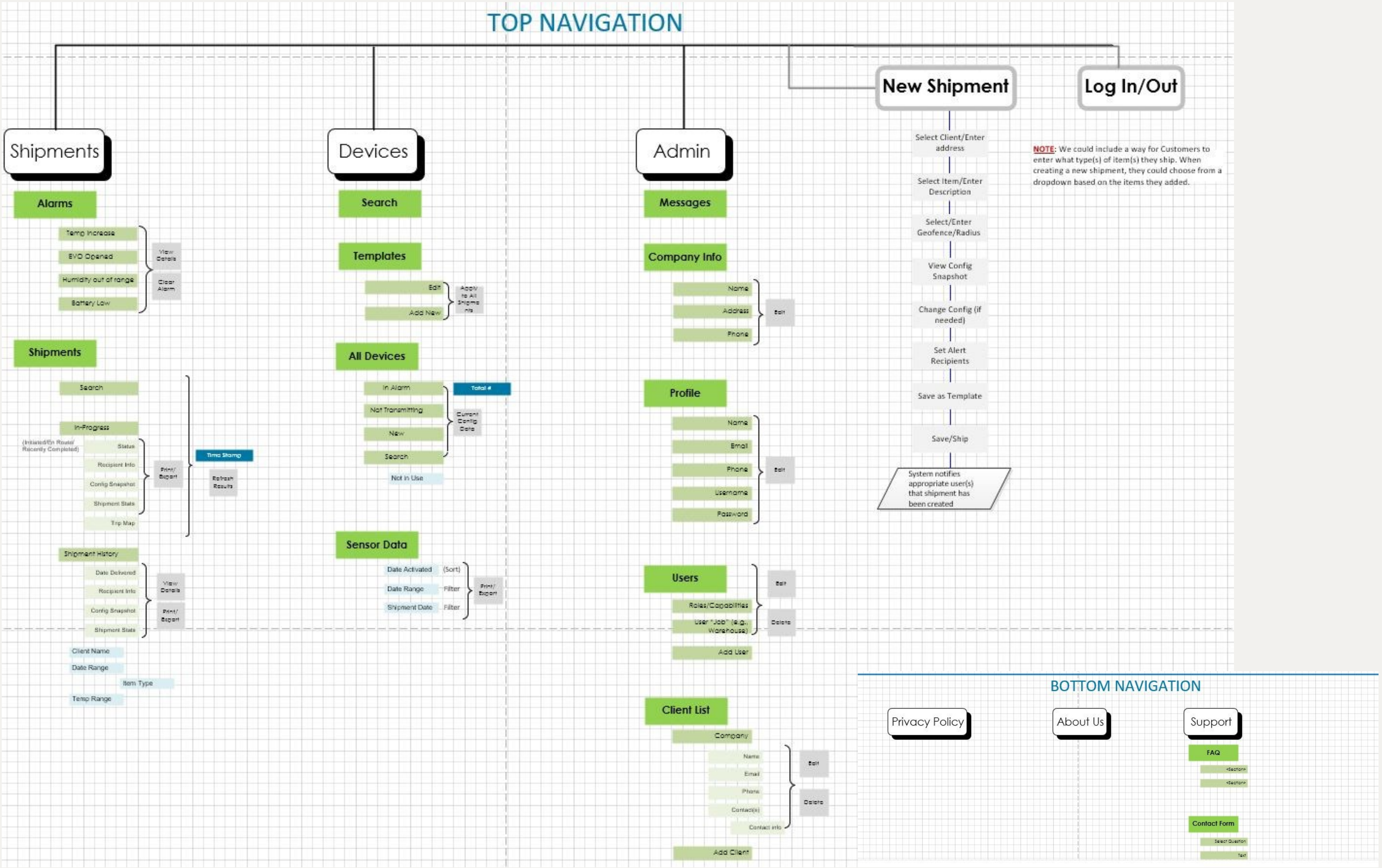
4
BioTech Firms
Visited &
Several Employees
Shadowed

8
Research Calls
with Relevant
Healthcare
Professionals

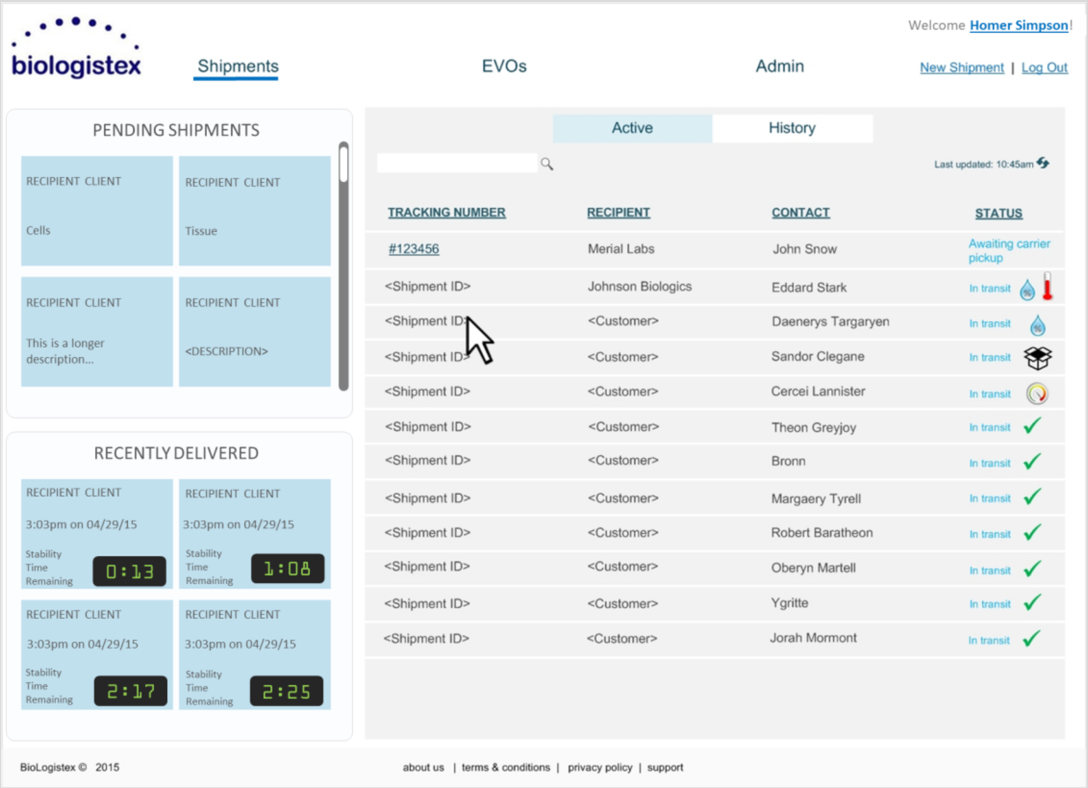
USER FLOWS


BIOLOGISTEX USER FLOWS
Customer calls BL to start account
Initiate "Add Customer"
BL Rep takes info
BL CSR is associated w/ Customer
EVO is set up & assigned
Email is sent to new Customer
NOTE: In order to utilize exiting a geofence to initiate a Shipment, we'll need to know the actual origin of shipments. This could be obtained during this process.
Co Name
Address
SHIPMENT ORIGIN
Main Contact
Email
Phone
Main Parameters
Customer/Info added to BL CSR's profile/ dashboard/area
Serial #
Friendly Name?
Activation
Data transmission starts (to both BL & Customer)
NOTE: If Customer desires, the BL CSR can preselect the configuration parameters that the customer will regularly need. This will lighten the first-run load for the user.
Customer enters Portal
Customer clicks link in email & is taken to First Run experience
Customer enters username & creates password
Initial area/UX for Portal displays (TBD)
Customer creates additional user(s) & assigns role(s)
EVO is set up by BL
EVO is NOT set up BL
Views device(s) & templates
No parameters Set
Set up parameters
Parameters Set by BL CSR
Can edit/add/ remove parameters
Create new Clients
NOTE: The first-run UX is generally determined once all other design is complete. This enables us to know what's in the UI and what sort of additional experiences/materials are available (e.g., training videos).
Shipment is ordered/ created
Client Not in System
Customer enters Client's info
Customer saves Client's info for future use
Co Name
Address
Main Contact
Email
Phone
Client added to Client List
Client In System
Customer enters client's geofence info (mile radius)
Device Config customised (if necessary)
EVO is packed
Waybill created
Return Waybill created
Shipment picked up/initiated
Portal displays EVOs trip & sensor info
Alerts are set for Customer
Alerts are set for Client
EVO arrives at Client location
SHIPMENT COMPLETE
Enable/disable parameter
Set ranges
Set time range for parameter
Snapshot of Config is tatken upon "Save"
EVO goes outside the origination geofence
User receives & handles Alerts/Alarms (via phone, email, & SMS)
Email and/phone of Client contact entered by Customer
EVO goes inside client geofence
Location + temp increase + light sensor

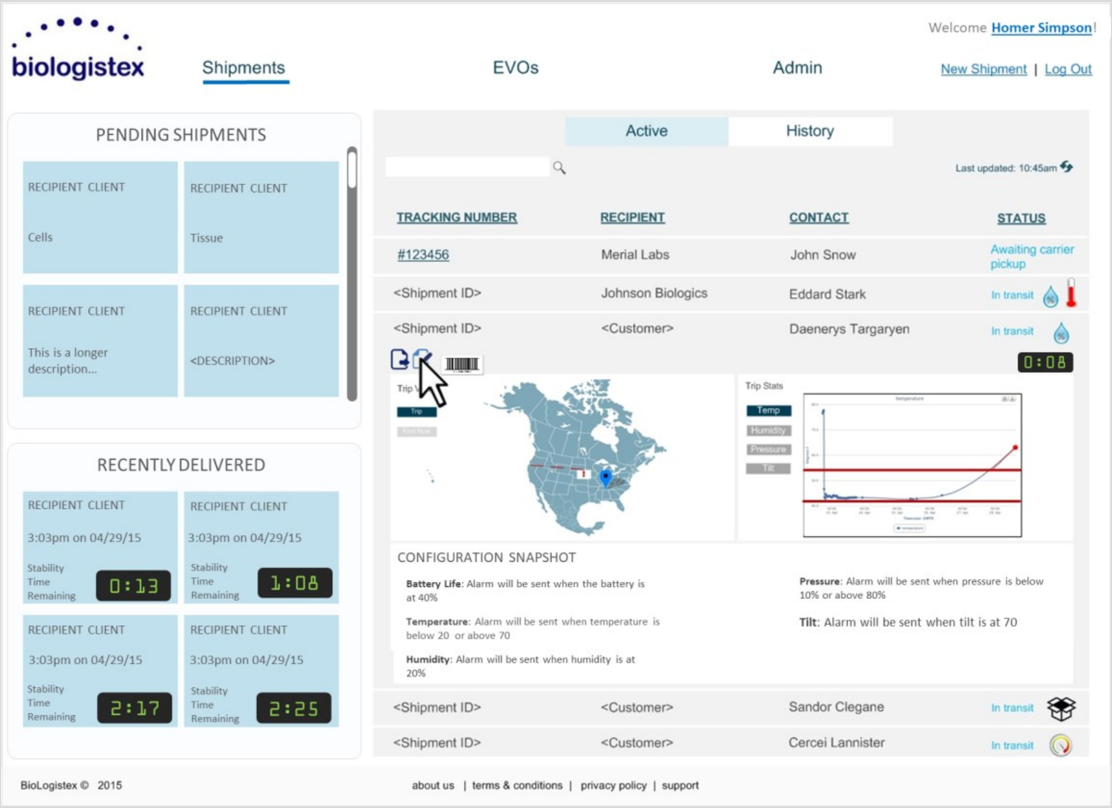
INFORMATION ARCHITECTURE



WIREFRAMES: Shipment Tracking Dashboard



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



Shipment Details includes:

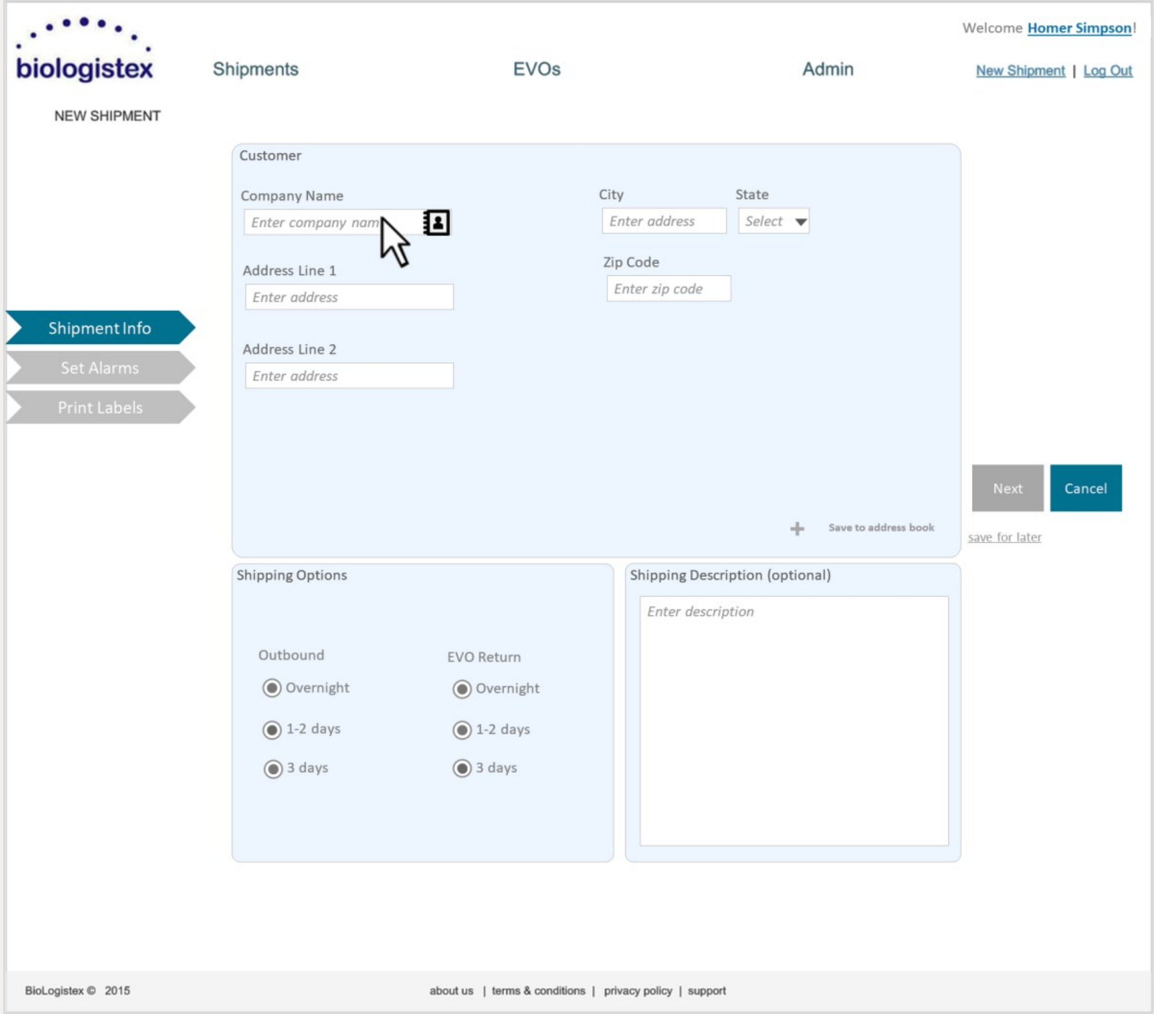
- Trip & GPS view
- Sensor Report
- Config snapshot
- Shipment Report
- Edit Shipment
- Stability Timer

Clicking the Edit icon will invoke the Edit Popover.

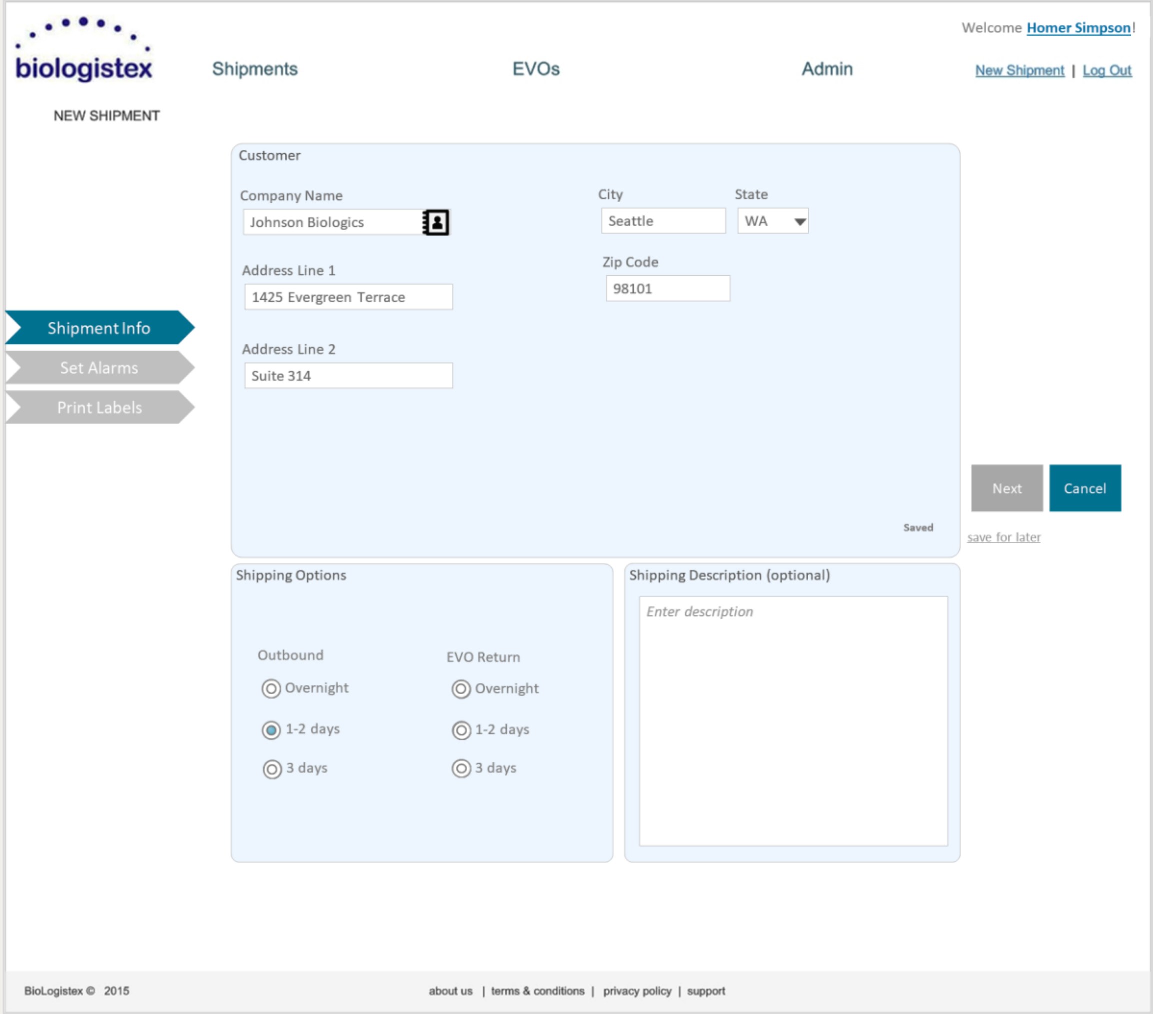
Design Rationale:

- 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

WIREFRAMES: Create a Shipment

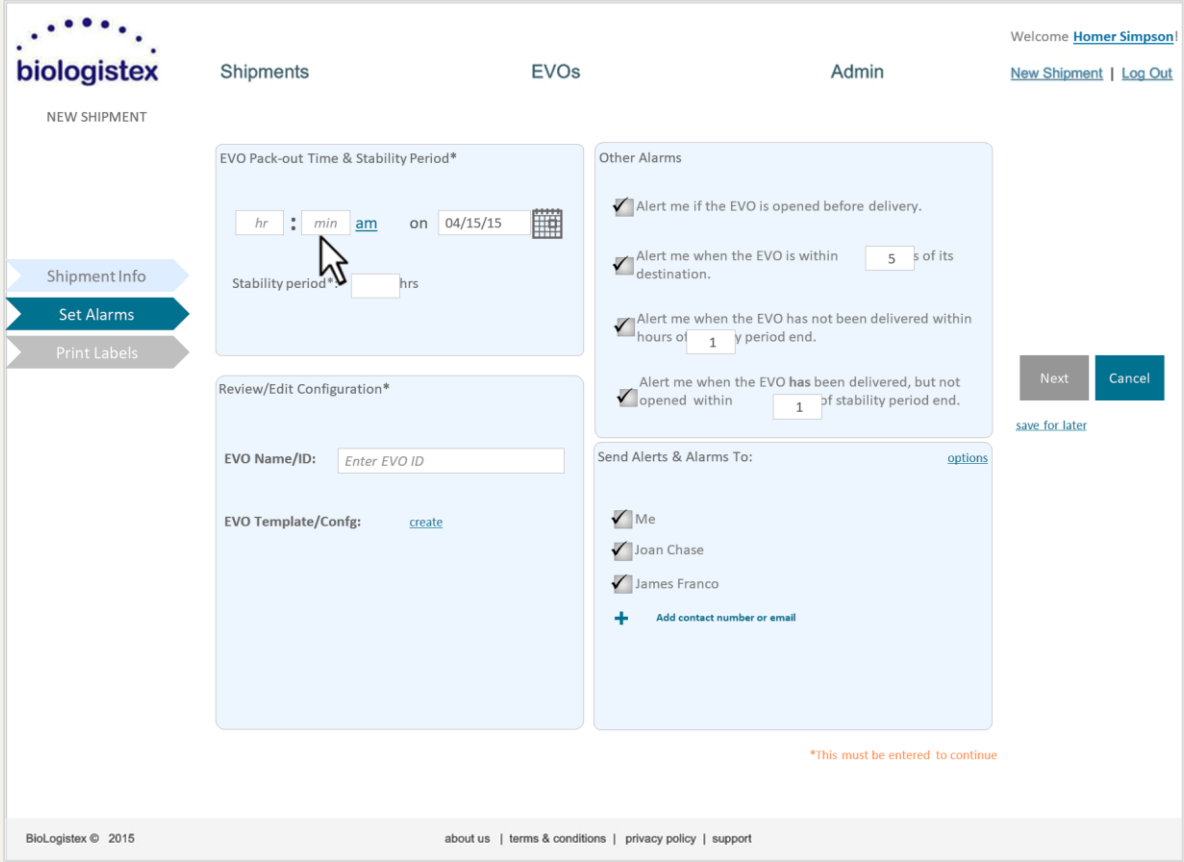


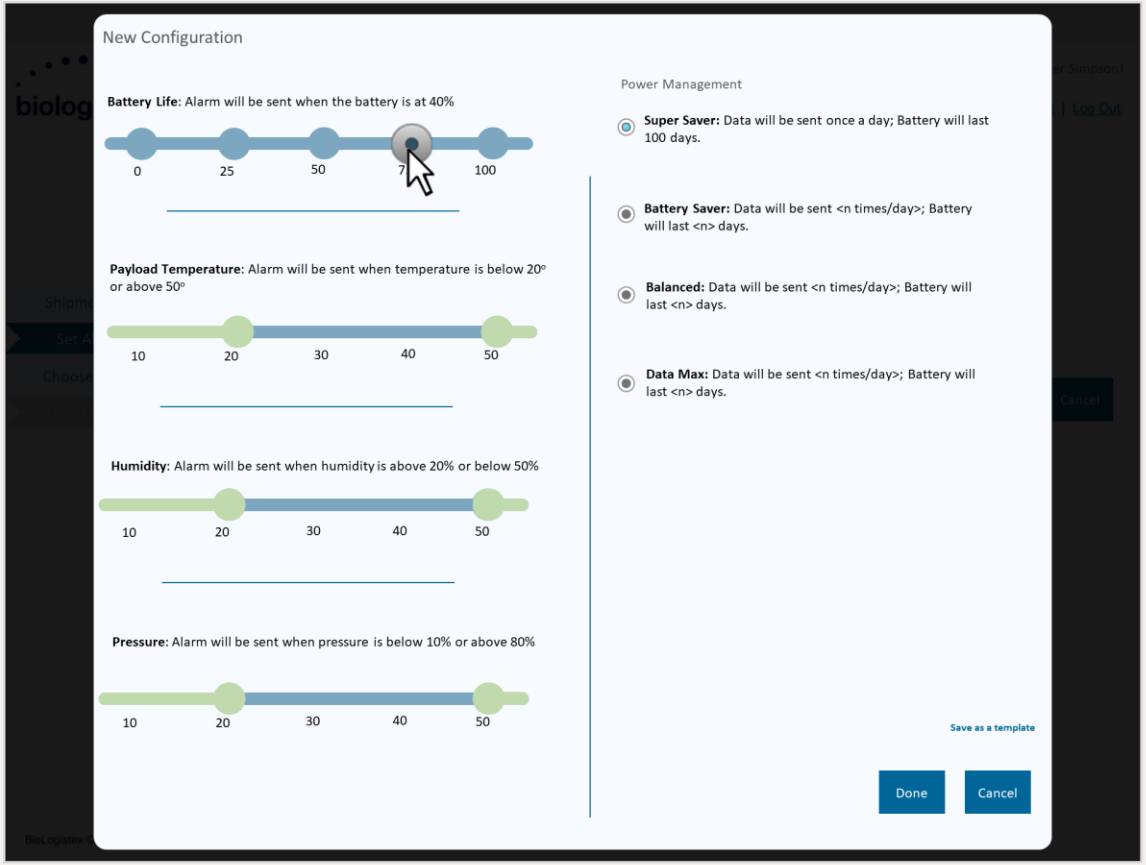
The user can manually enter contact information for the recipient.



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

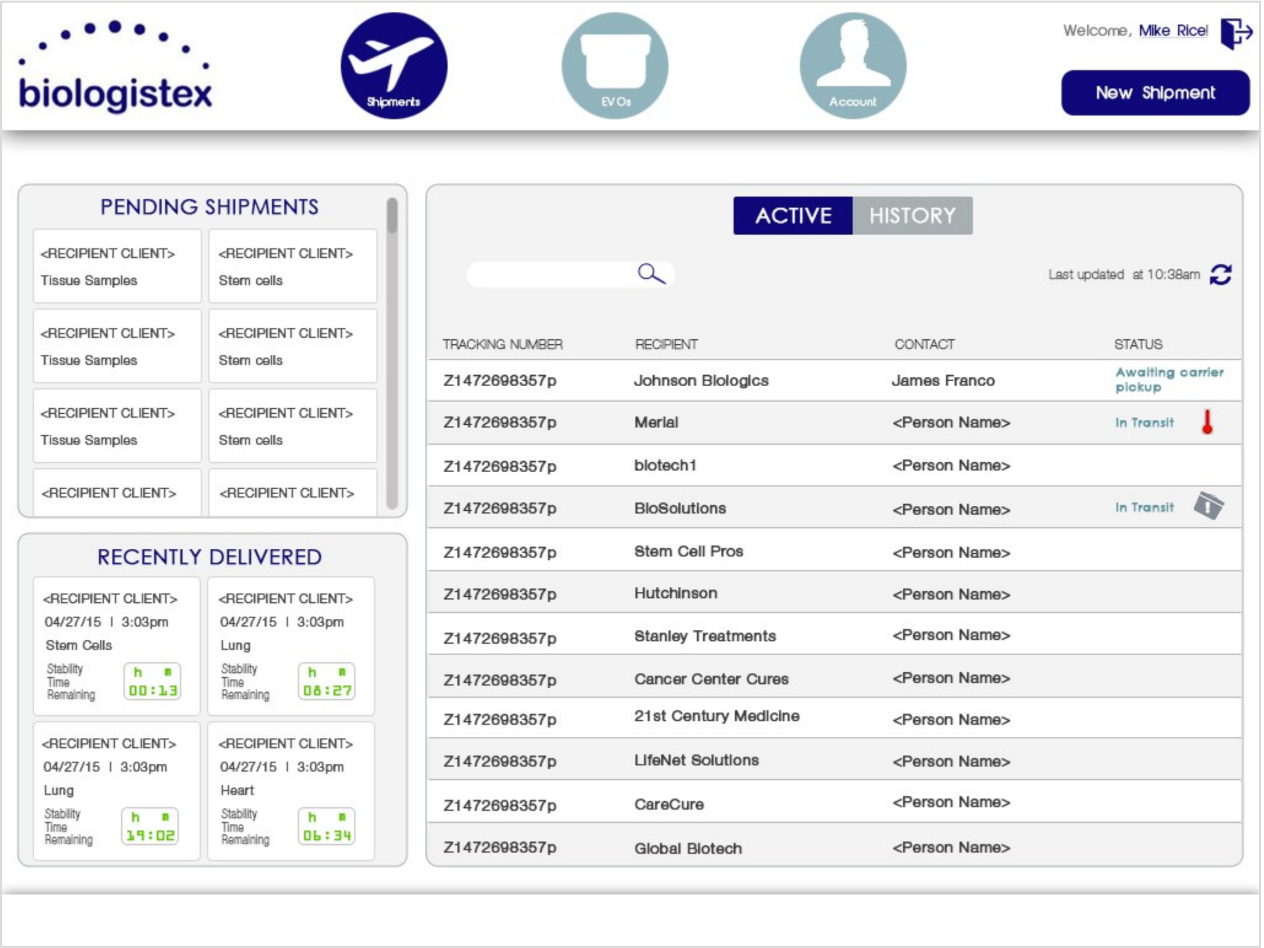
If they haven't packed the EVO yet, they won't be able to continue the shipment and will need to save it for later.

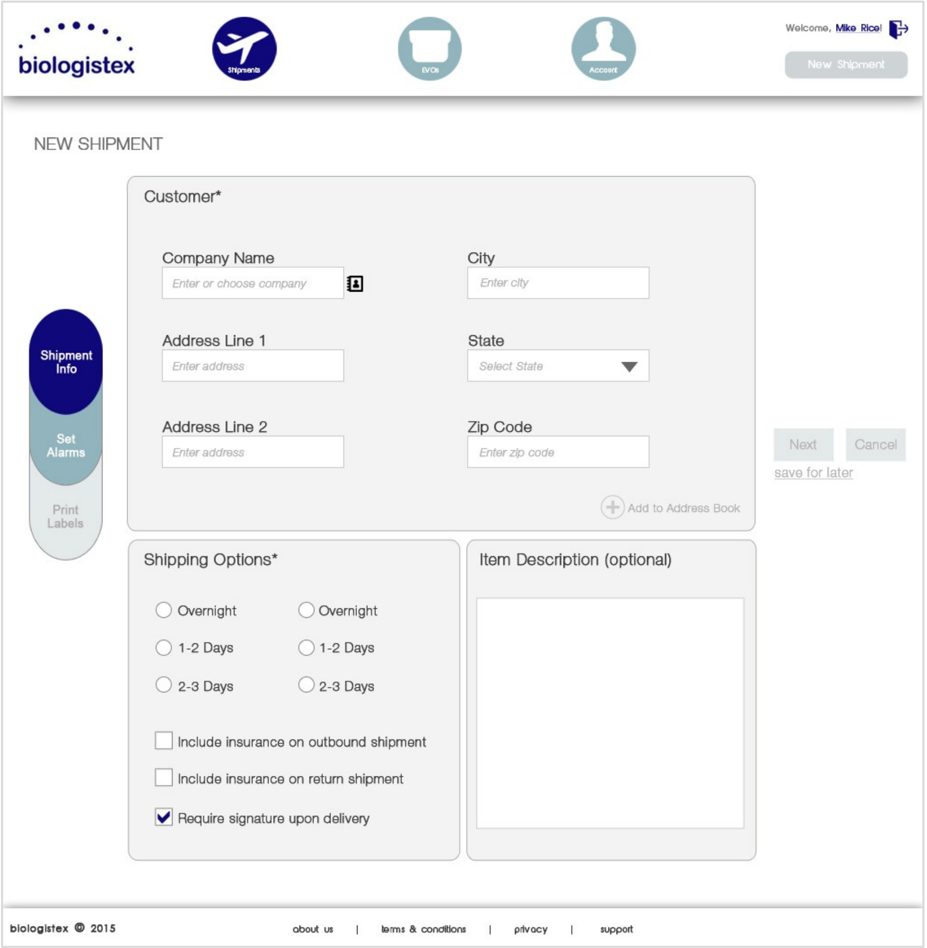
NOTE: Since we need the user to enter the time in order to let them move to the next step, **there can be no default time in the related fields.**

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

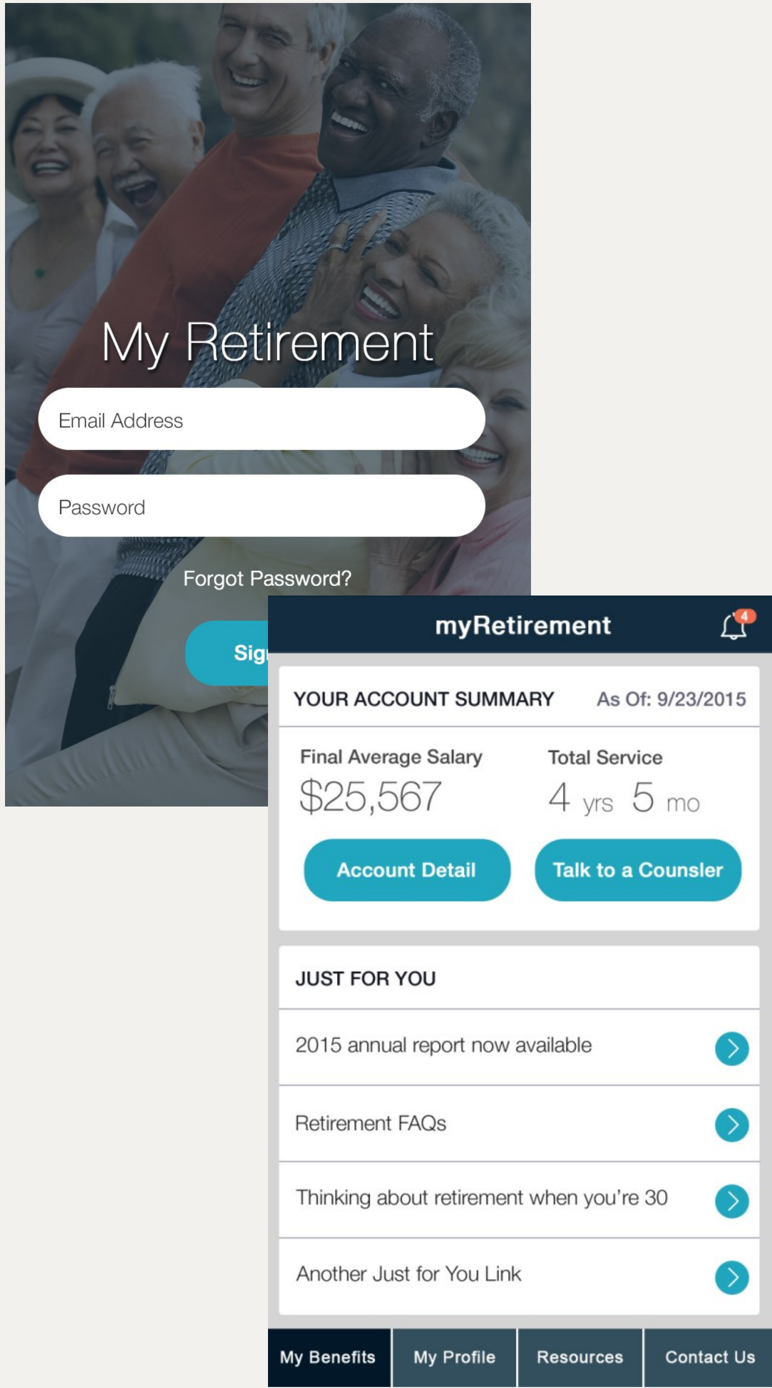




3 ACCENTURE'S PENSION SYSTEMS TRANSFORMATION

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



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 benefit2) 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 inf transactions?	
DEMOGRAPHICS	

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 ha Pension System - they will not know what to ask for. To get reminders and make sure they're on track, things li 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 bu major.
Very close to retirement	These members are concerned with figuring out how to maximize their retirement/investment. They're not lo tell the Pension System what they want, where they want to be in <X> amount of time. They may want to buy a As they come to within ~a year to 3 months of retirement, it becomes more critical for them to think about wha and planning. They need access to information about what their peers have done. This is where the app needs people they could talk to about what they've decided to do. It's about connecting with peers, not about getting
Newly Retired	Really concerned with "I'm not getting my salary, when is my pension check going to come?" Making sure pens retired, ensuring their contact info is correct. Making sure that nothing goes sideways with their pension payme 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 peri *what's happening in Marketplace that impacts me?* Changes to healthcare regulations, changes in eligibility, tax them. They need the Pension System to PUSH information when it happens, not just a newsletter. E.G., your st you might be eligible for a 2% reduction in healthcare contribution. They should be able to "click here" from any 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.

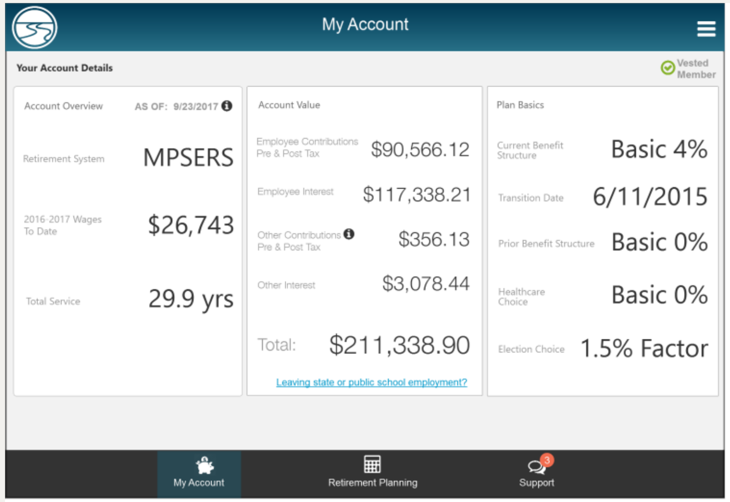
Scenario 2

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

- **ACCOUNT SNAPSHOT**
  - Alerts
  - Account Overview
  - Account Value
  - My Pension Basics
- **RETIREMENT PLANNING**
  - Dependents & Benes
    - Beneficiaries Count
    - Add/Manage
  - Retirement Card
    - Run/View Estimate
    - Apply for Retirement
  - About Plans
    - Pension
    - Health
- **SUPPORT**
  - FAQs
  - Facebook
  - Announcements
  - Message Board (Phase II)
- **FLYOUT MENU**
  - My Contact Info
  - Settings
  - Log Out



"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 access through the sub/side menu.

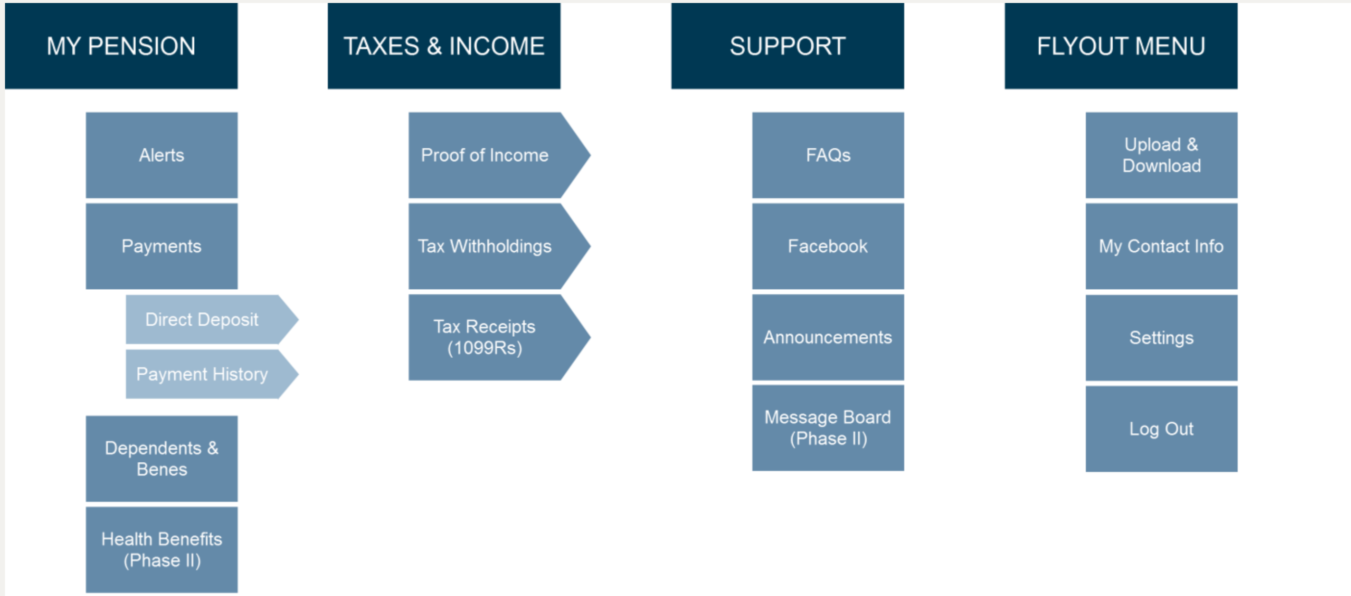
"Plan Basics" is still under review, and may move to the Flyout Menu; it's meant to surface read-only, non-actionable basic information about the member's retirement system and benefit plan.

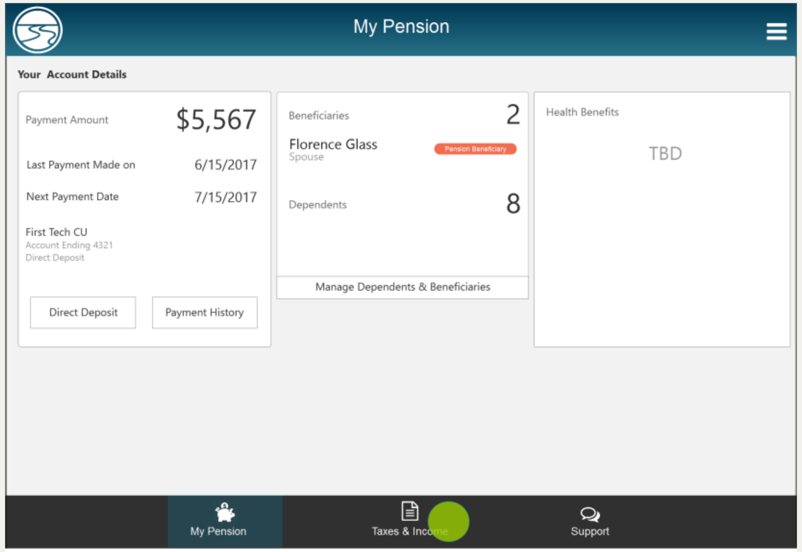
With this Navigation Model, there are 3 App Menu Items:
- My Account
- Retirement Planning (or "Pension Planning")
- Support (Groups Resources & Contact Us, since these are very scaled down/simplified for ORS)

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



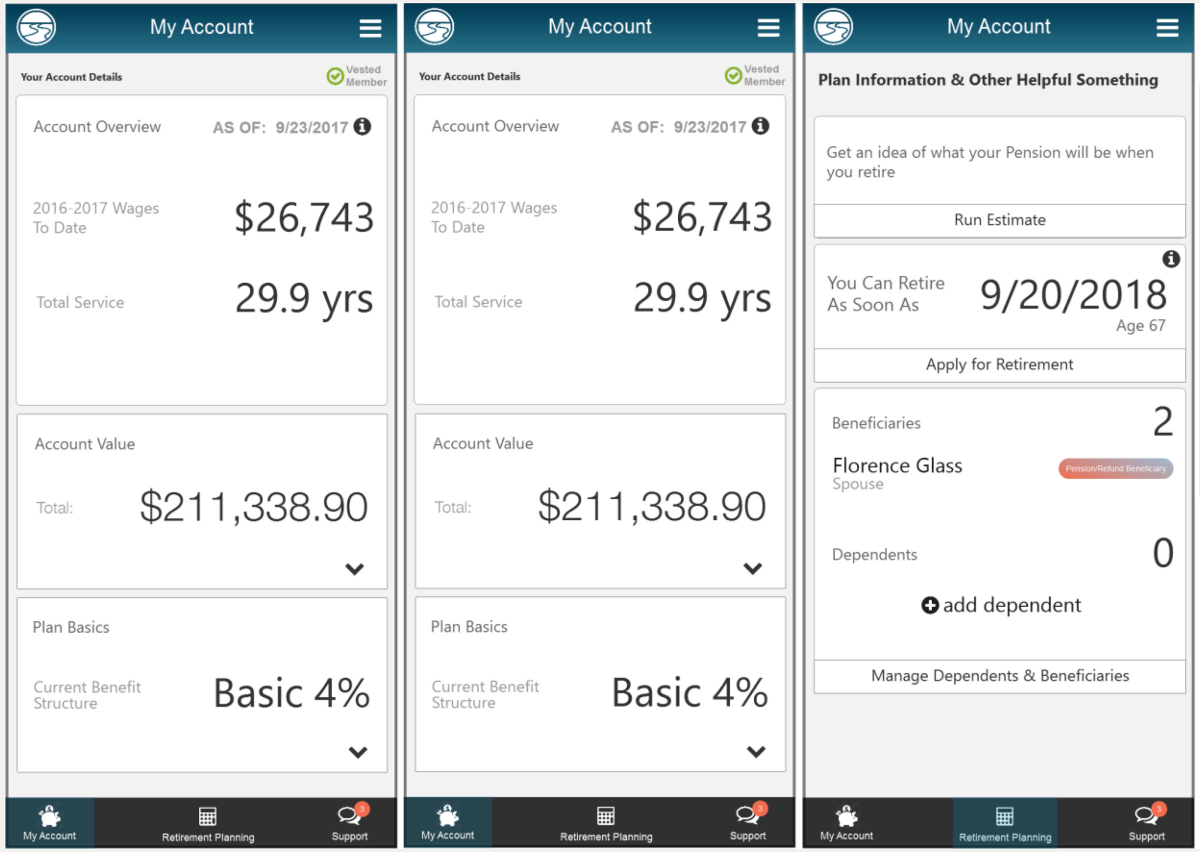


Scenarios for Retirees are very different. For this reason, we would restructure the app for after a user retires and they'd see this Navigation Model instead. There are still 3 Main Nav items:
- My Pension (payments, financial info, Beneficiaries - since they're also receiving benefits/money)
- Taxes & 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)

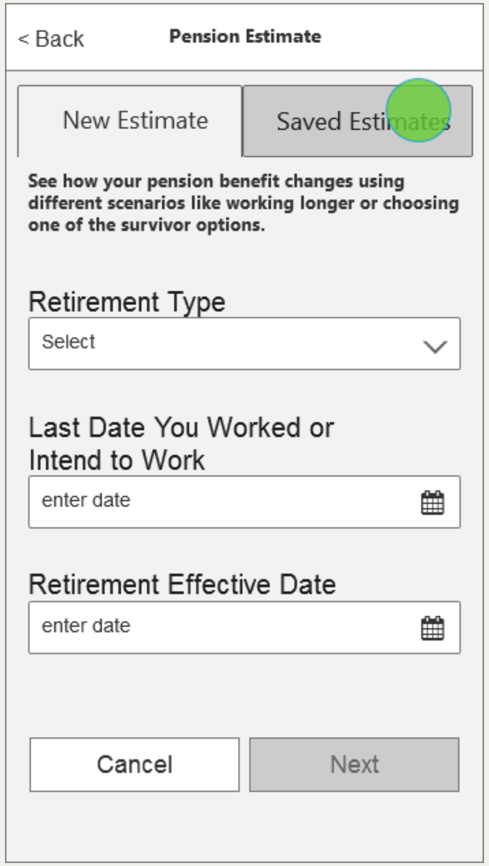
The My Pension Page includes the Payment Card; the only change to this card is that there's a PAYMENT HISTORY button. It makes sense to put this in the card since we're displaying the Last Payment Date here.

Beneficiaries Card is the same as for Active Members.

ROUGH WIREFRAMES



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



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 displays these lines/values.

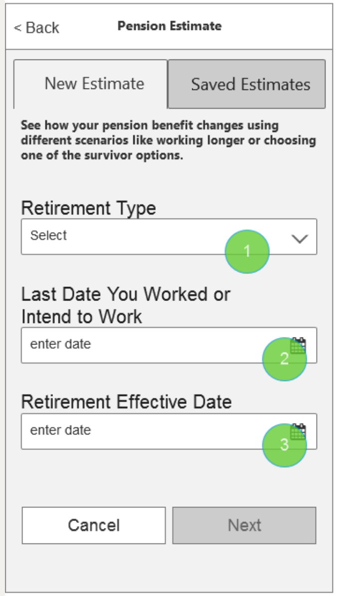
NOTE: (Plan Basics Card).Some members will not have a *Transition Date* (if they're new to the system). In these cases, the app will hide this value

Design Rationale:

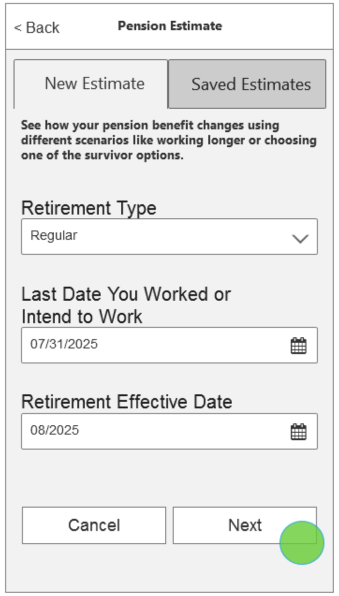
- Needed a "smart" app that displays appropriate info/functionality based on 3 Personas
  - Younger Planner
  - Pre-retirement
  - Retiree
- Card-based approach is great for financial information that has tiers of importance (e.g., summary vs. detail)
- Users aren't going to come to the app often, so 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

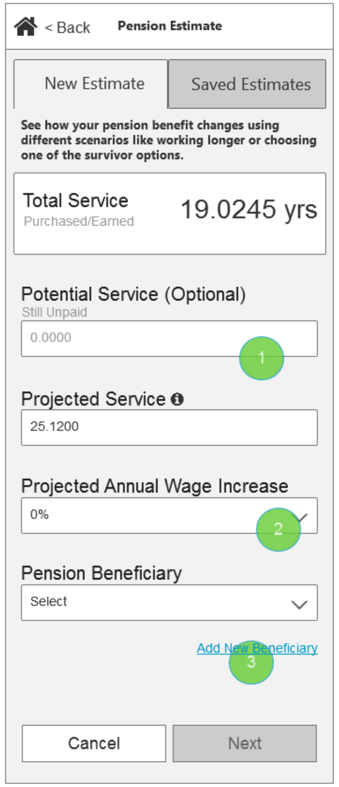
Estimate - Basic Info



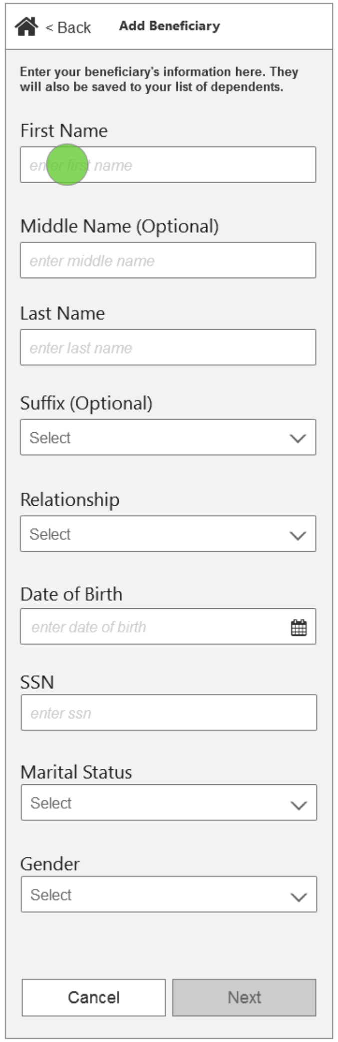
Estimate - Basic Info



Estimate - Service

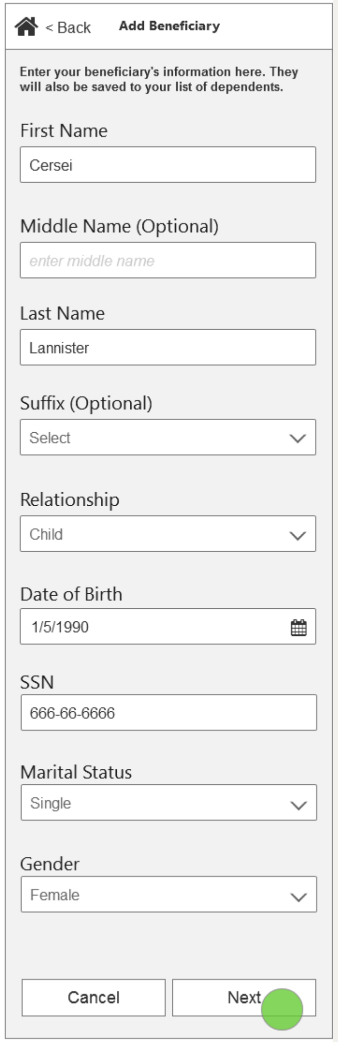


Add New Beneficiary



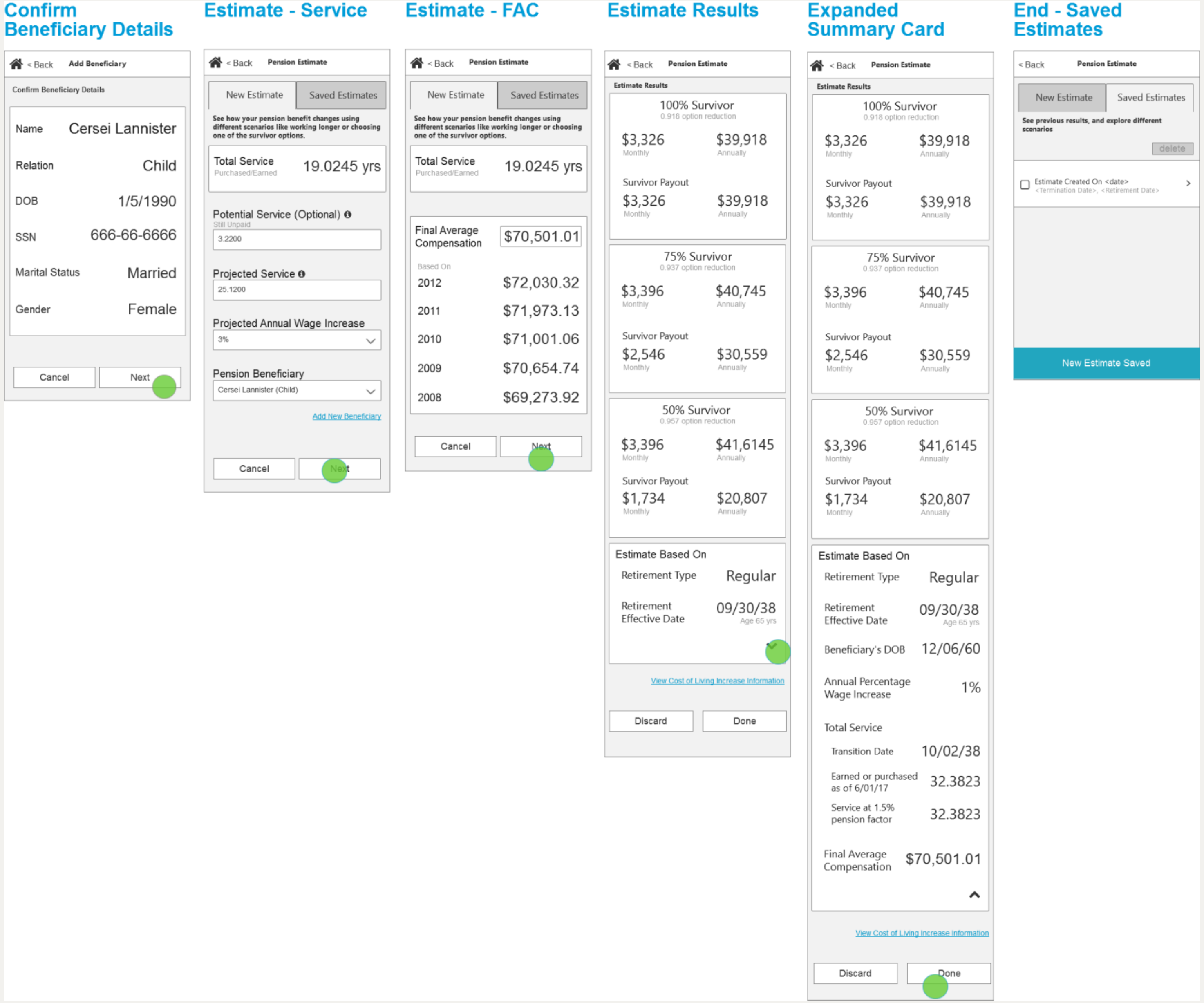
Enter information for new contact. Clicking cancel takes the user back to the previous page.

Add New Beneficiary



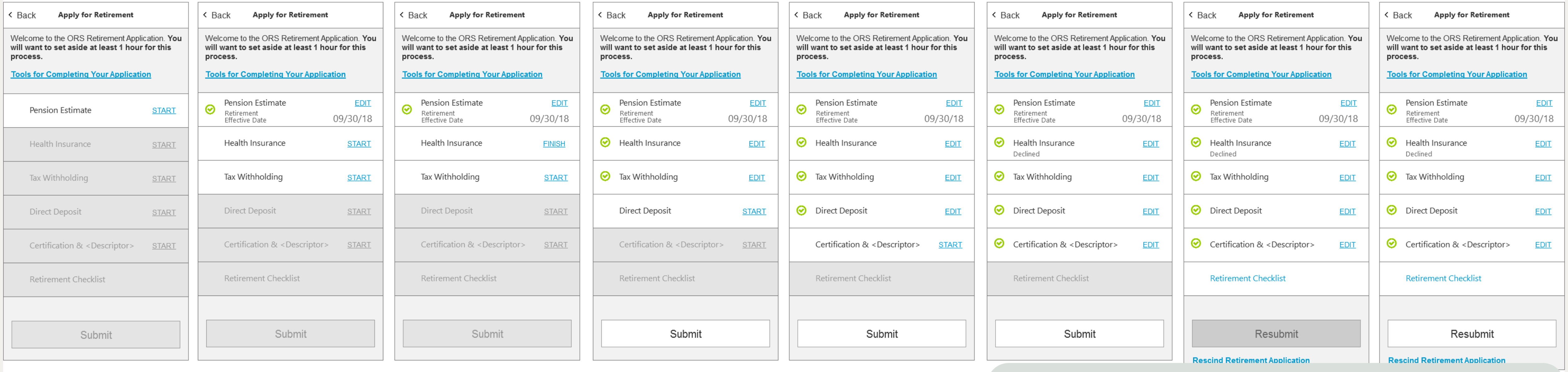
Enter information for new contact. Clicking cancel takes the user back to the previous page.

WIREFRAMES: Pension Estimate



WIREFRAMES: Apply for Retirement

RETIREMENT APPLICATION STEP LIST STATES



Each step that has been completed will include a visual indicator (checkmark).

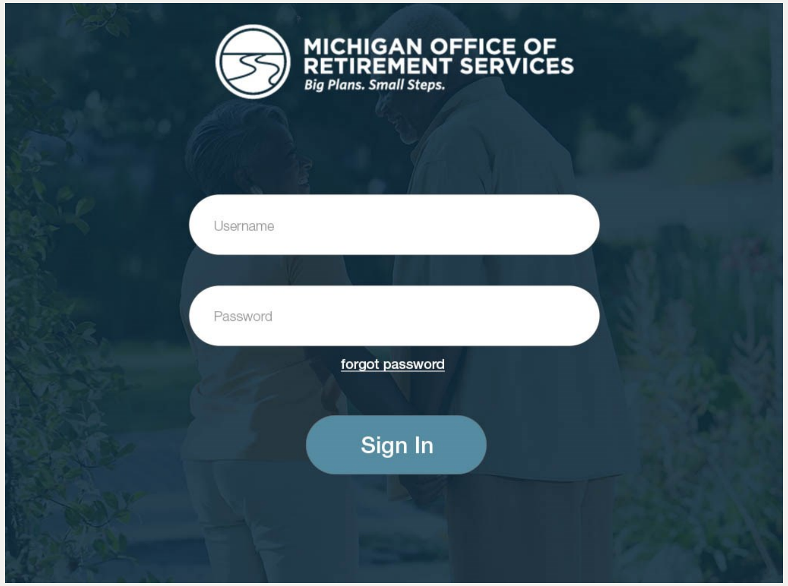
If a step in the list has been started and saved for later, but not completed, the link for that item will toggle to FINISH. The next step in the list is NOT enabled until the incomplete step is finished.

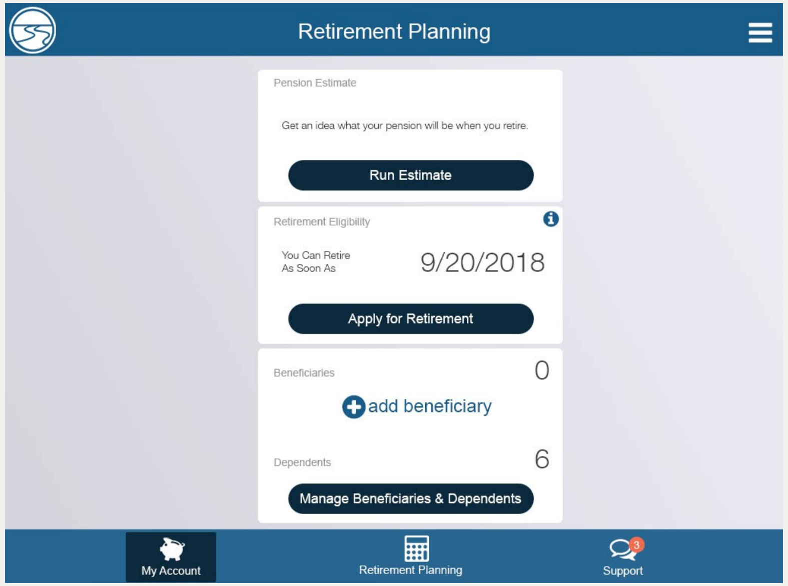
When a step is completed, the *following* step in the list and the related link are enabled.

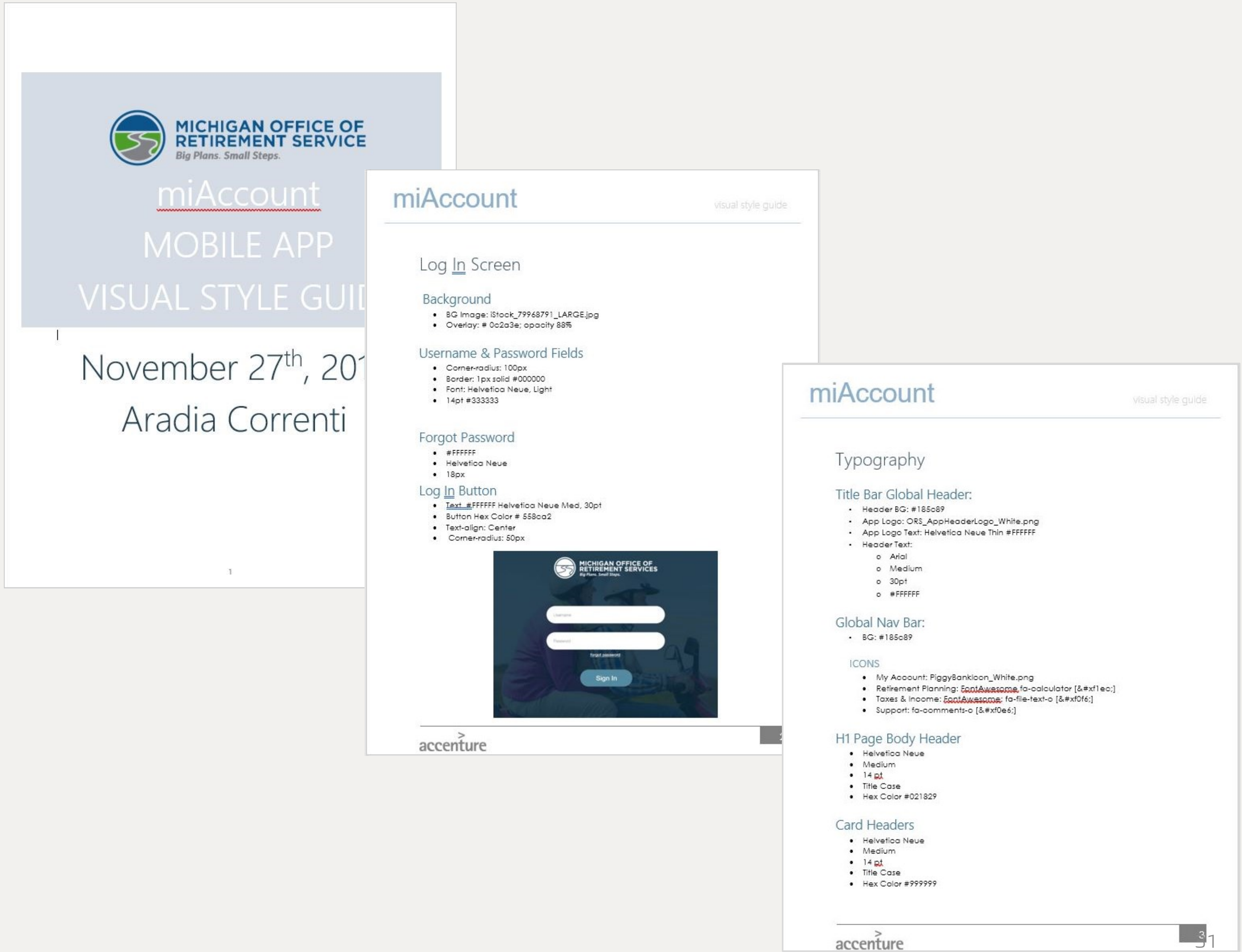
Design Rationale:

- 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







miAccount — visual style guide

Log In Screen

Background
- BG Image: iStock_79968791_LARGE.jpg
- Overlay: # 0c2a3e; opacity 88%

Username & Password Fields
- Corner-radius: 100px
- Border: 1px solid #000000
- Font: Helvetica Neue, Light
- 14pt #333333

Forgot Password
- #FFFFFF
- Helvetica Neue
- 18px

Log In Button
- Text #FFFFFF Helvetica Neue Med, 30pt
- Button Hex Color # 558ca2
- Text-align: Center
- Corner-radius: 50px

accenture

miAccount — visual style guide

Typography

Title Bar Global Header:
- Header BG: #185c89
- App Logo: ORS_AppHeaderLogo_White.png
- App Logo Text: Helvetica Neue Thin #FFFFFF
- Header Text:
  - Arial
  - Medium
  - 30pt
  - #FFFFFF

Global Nav Bar:
- BG: #185c89

ICONS
- My Account: PiggyBankIcon_White.png
- Retirement Planning: FontAwesome fa-calculator []
- Taxes & Income: FontAwesome: fa-file-text-o []
- Support: fa-comments-o []

H1 Page Body Header
- Helvetica Neue
- Medium
- 14 pt
- Title Case
- Hex Color #021829

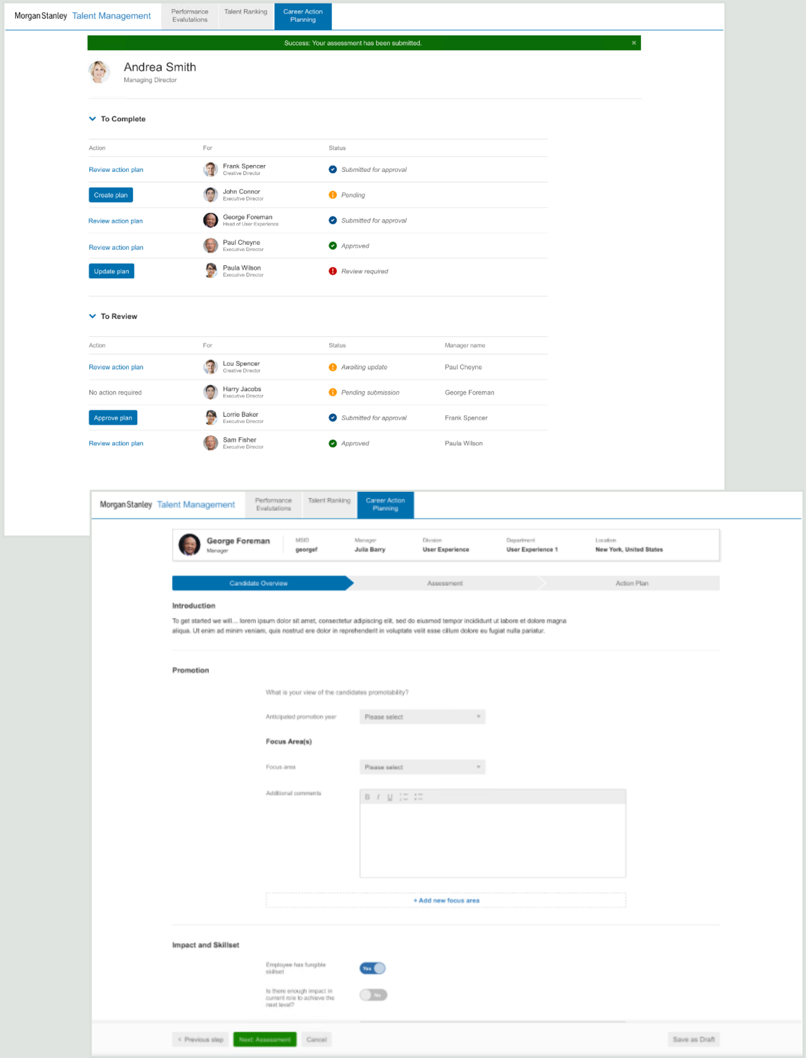
Card Headers
- Helvetica Neue
- Medium
- 14 pt
- Title Case
- Hex Color #999999

accenture 3

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

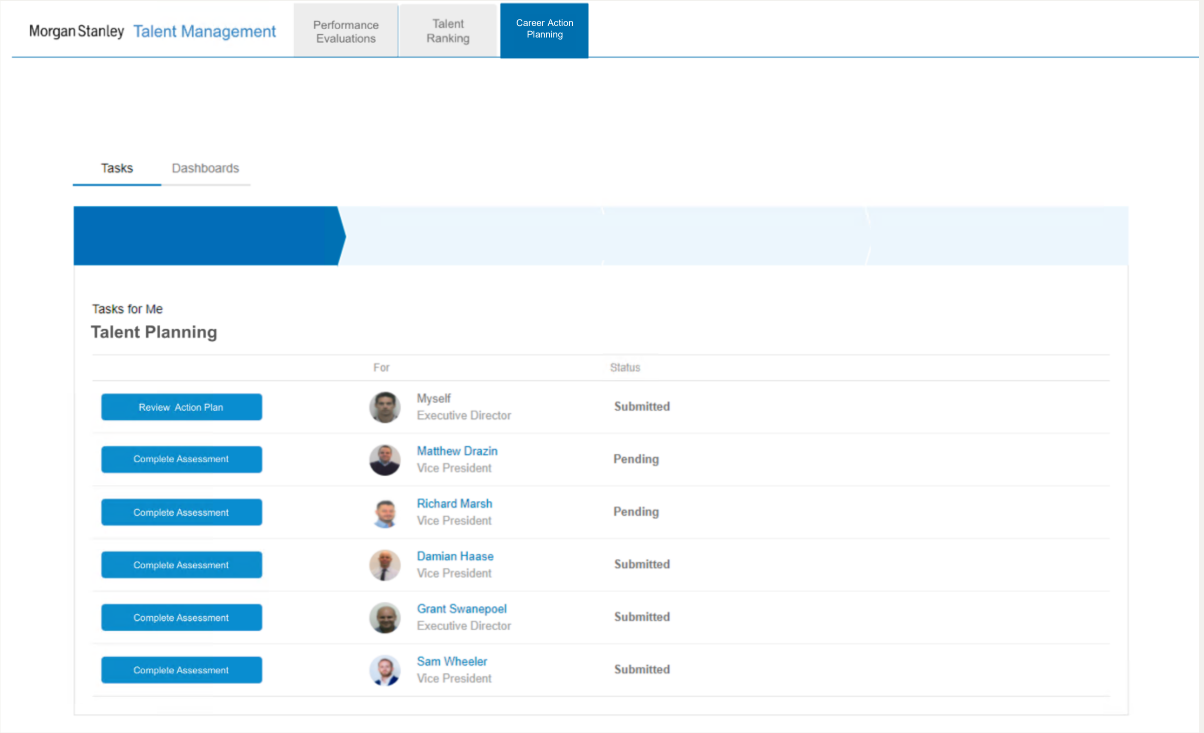
- Interviewed people leaders to understand their mental model, pain points, and needs re: talent management and growing their people
- Interviewed HR regularly to understand geopolitical and general HR constraints and sensitivities
- Met with HR regularly to tease out and continuously refine requirements

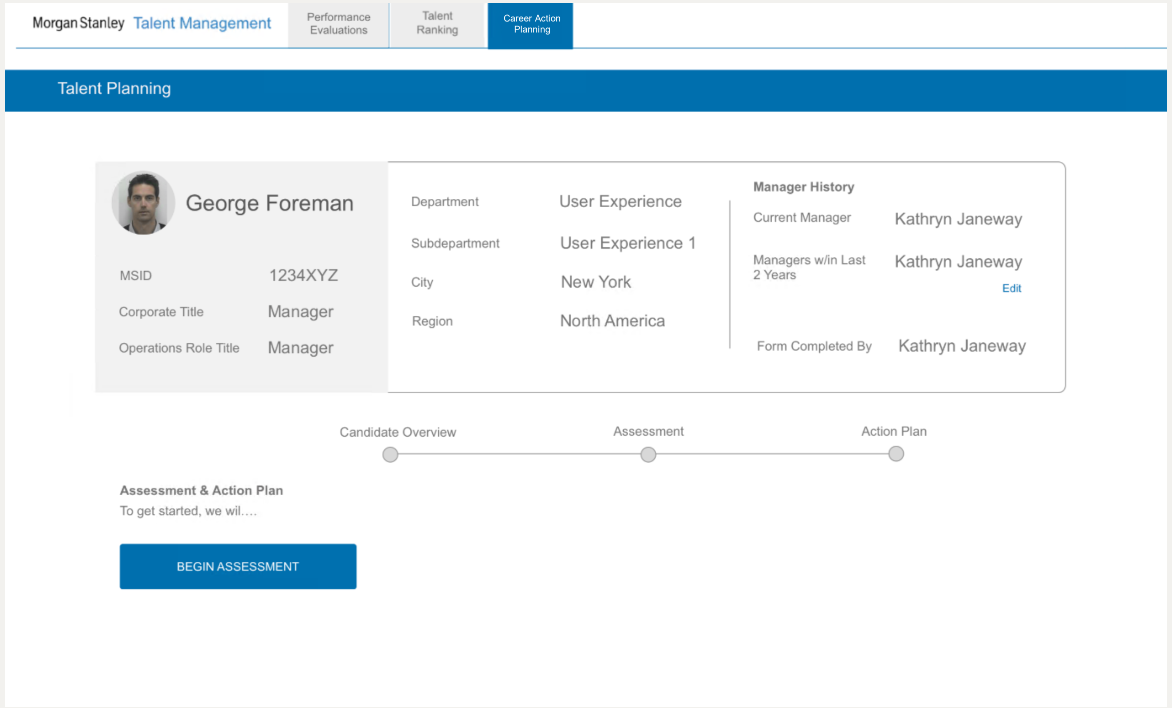
1
Week of
Deep Analysis

6
People
Leader
Interviews

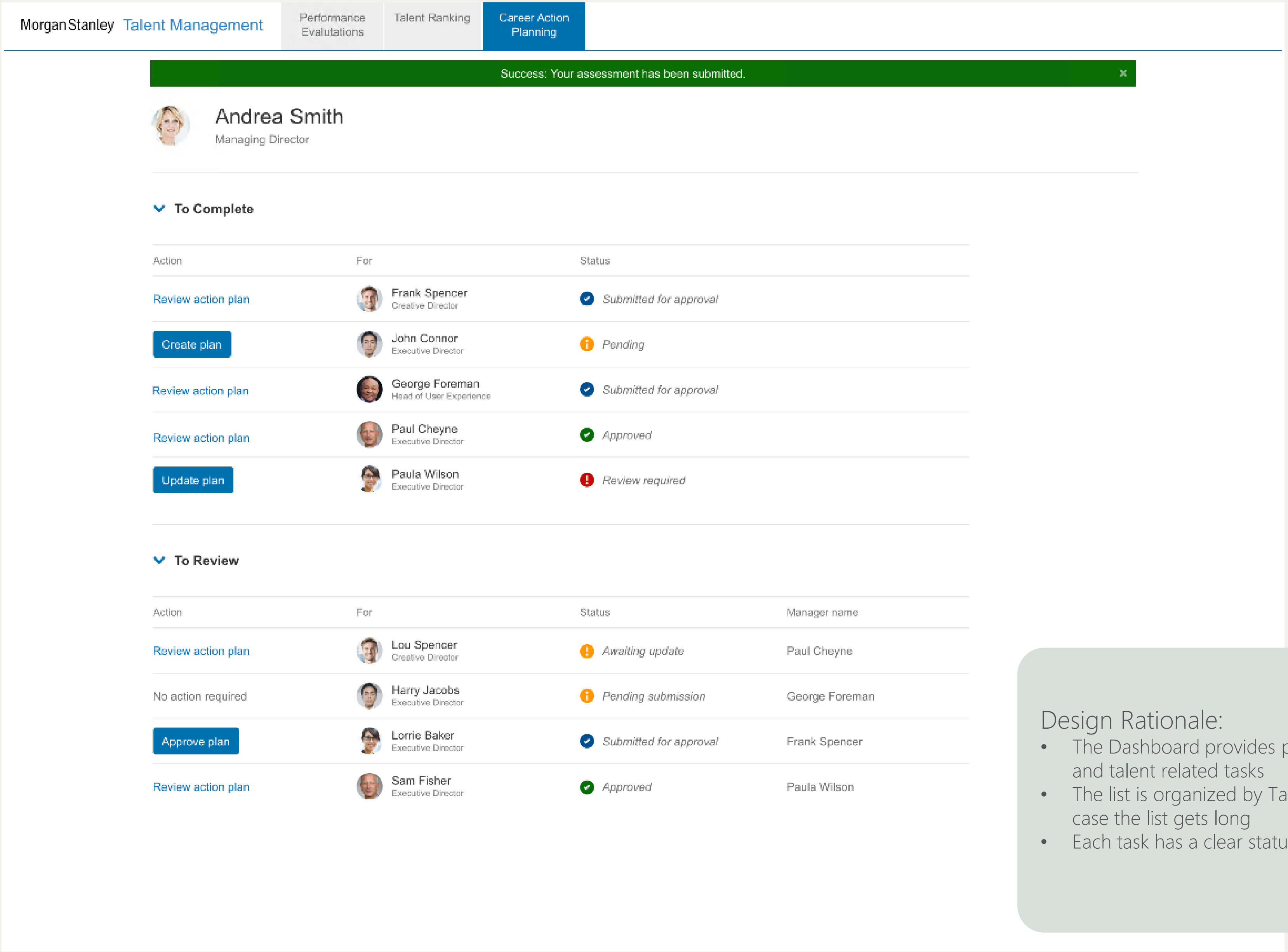
3
Prototype
Usability
Sessions

EARLY CONCEPTS





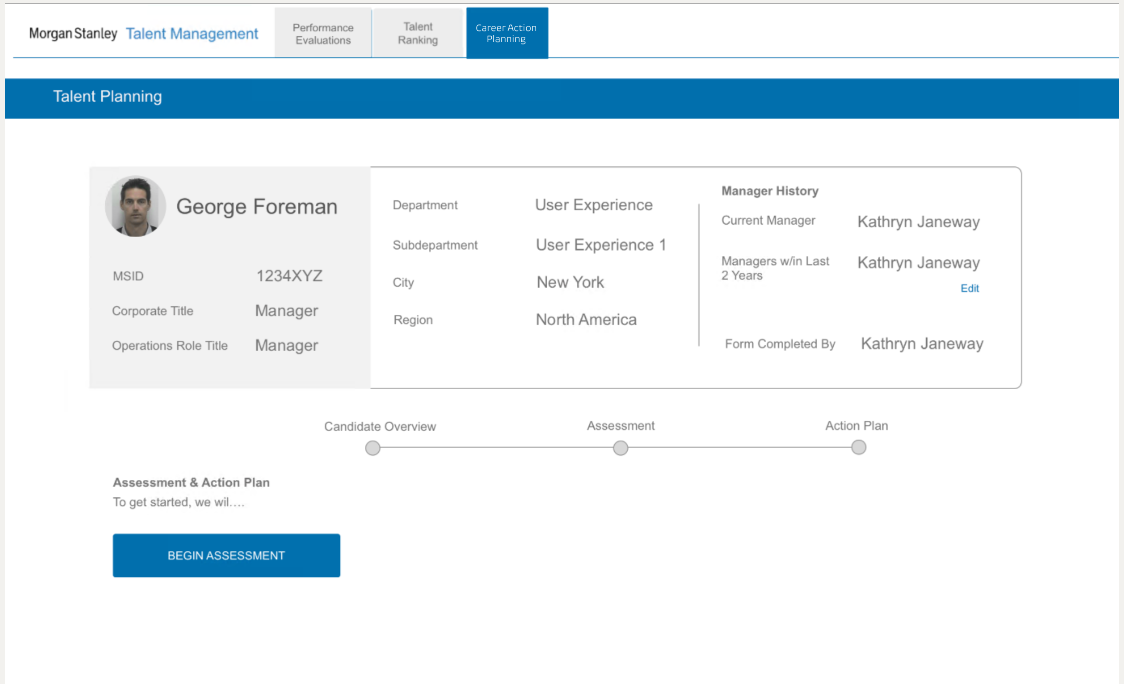
TALENT MANAGEMENT DASHBOARD

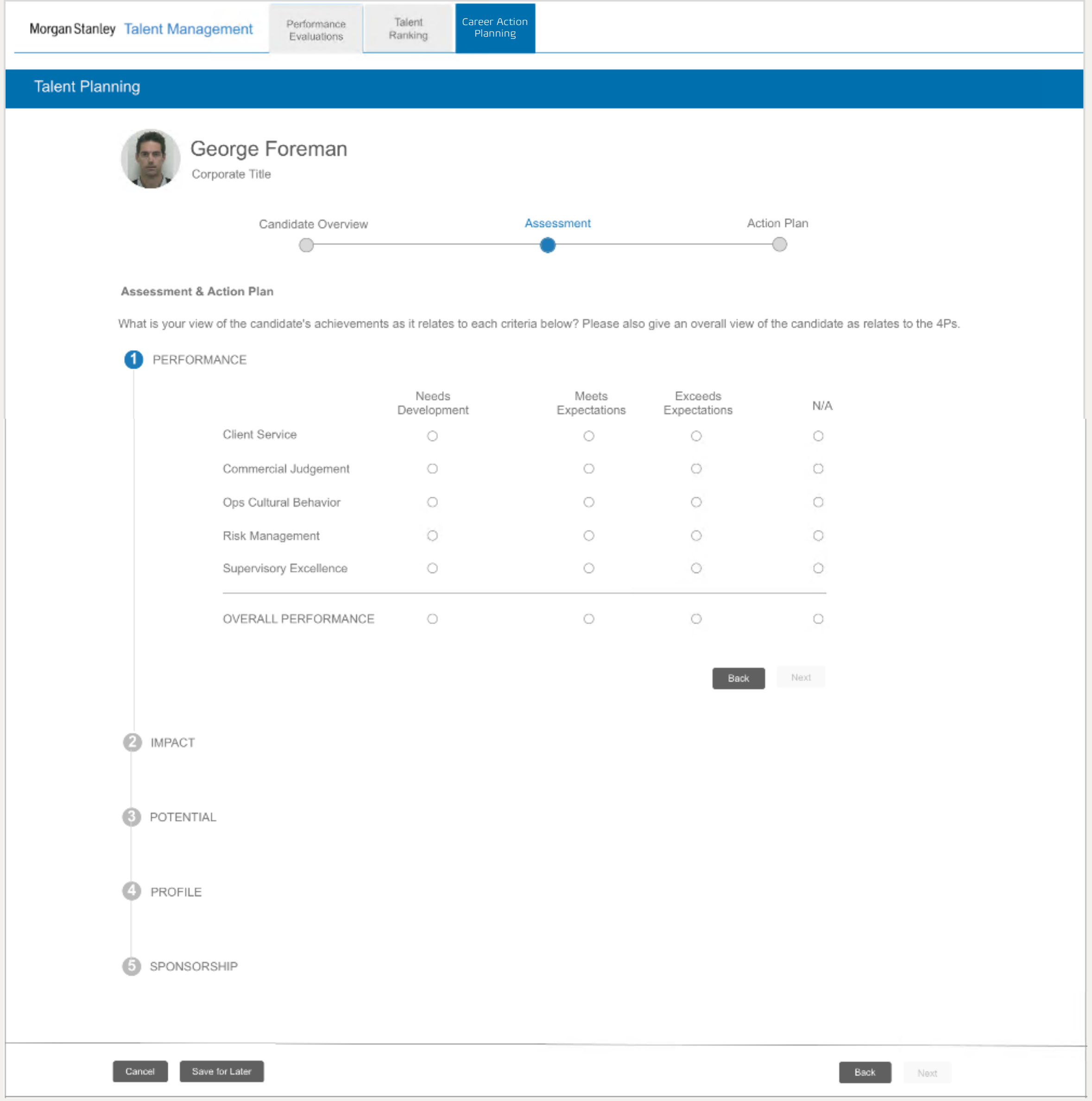


Design Rationale:

- 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.

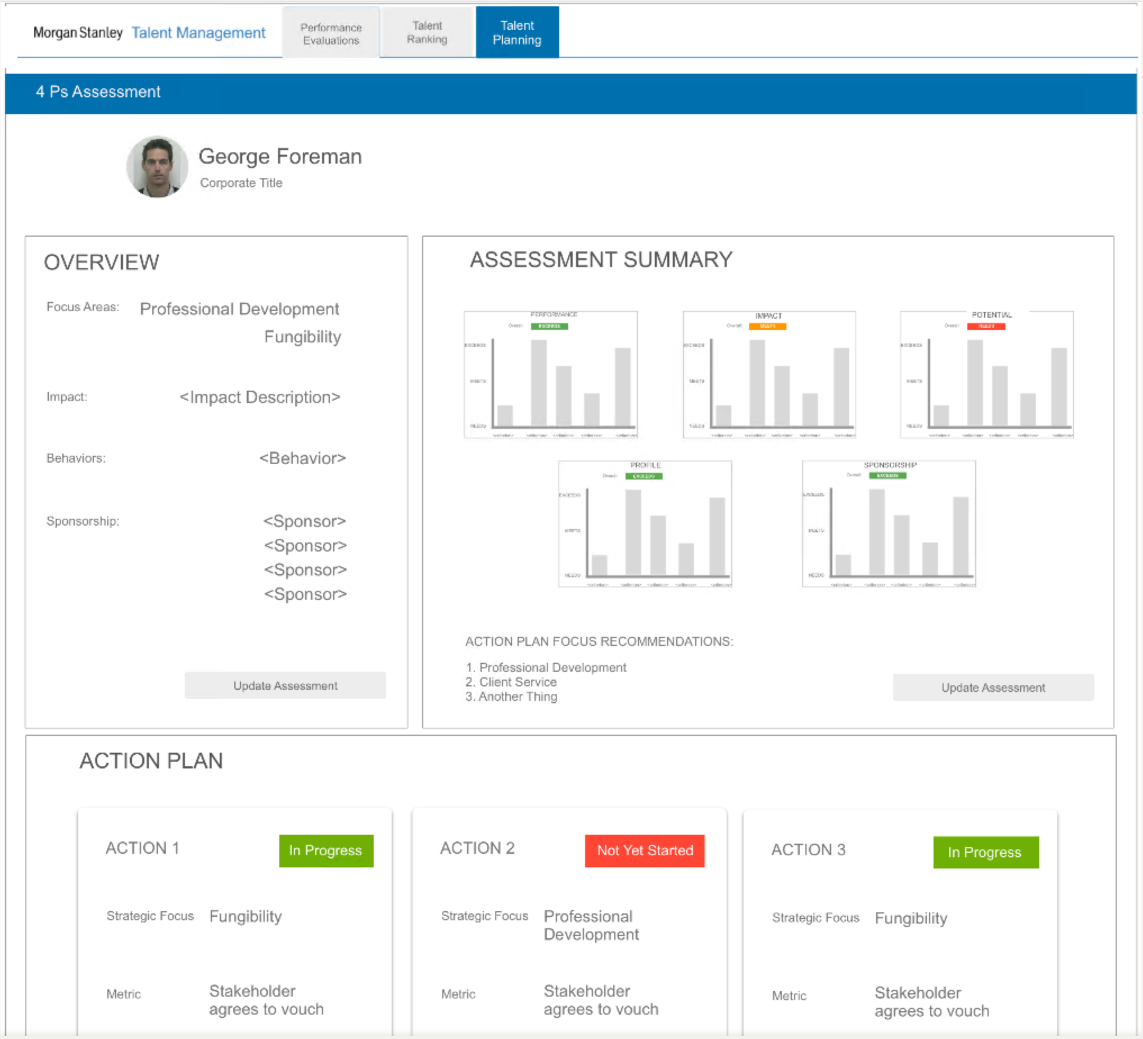
WIREFRAMES: Candidate Assessment

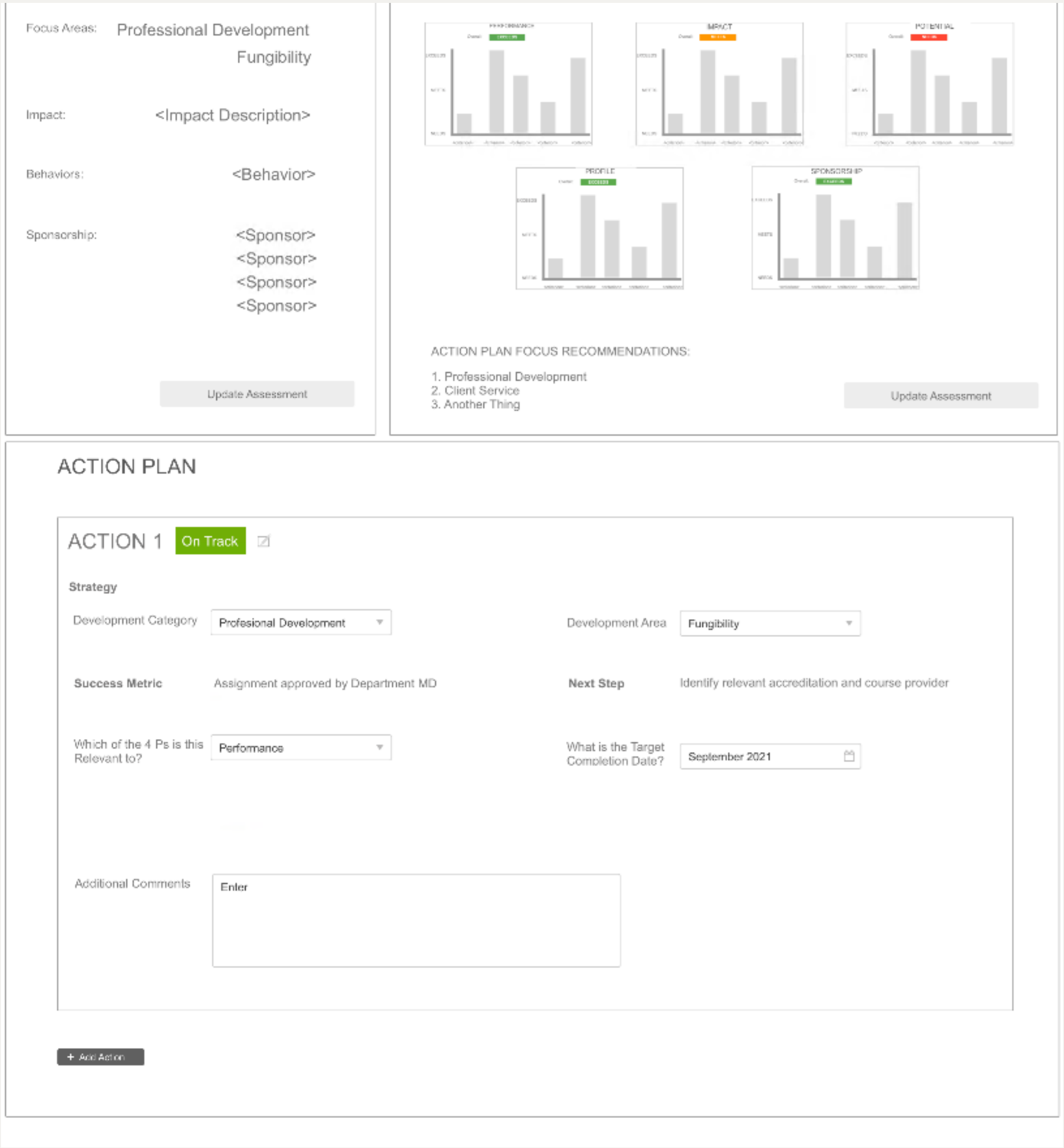




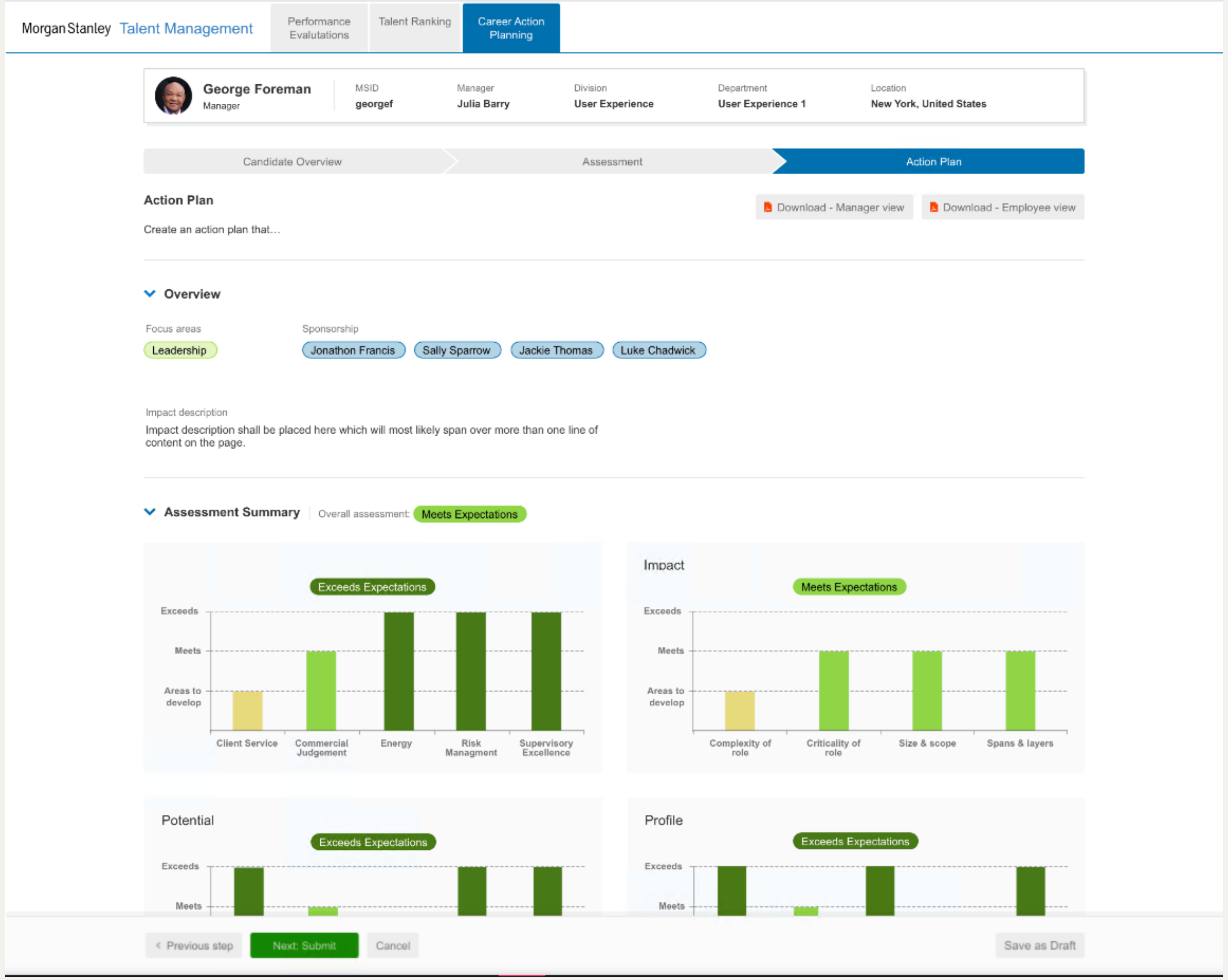
- The workflow starts with an overview of the associate, and a clear indication of what to do next
- The Assessment comes in the form of a progressive disclosure form with collapsible sections
- Each section of the form can be interacted with and edited at any point in the assessment process

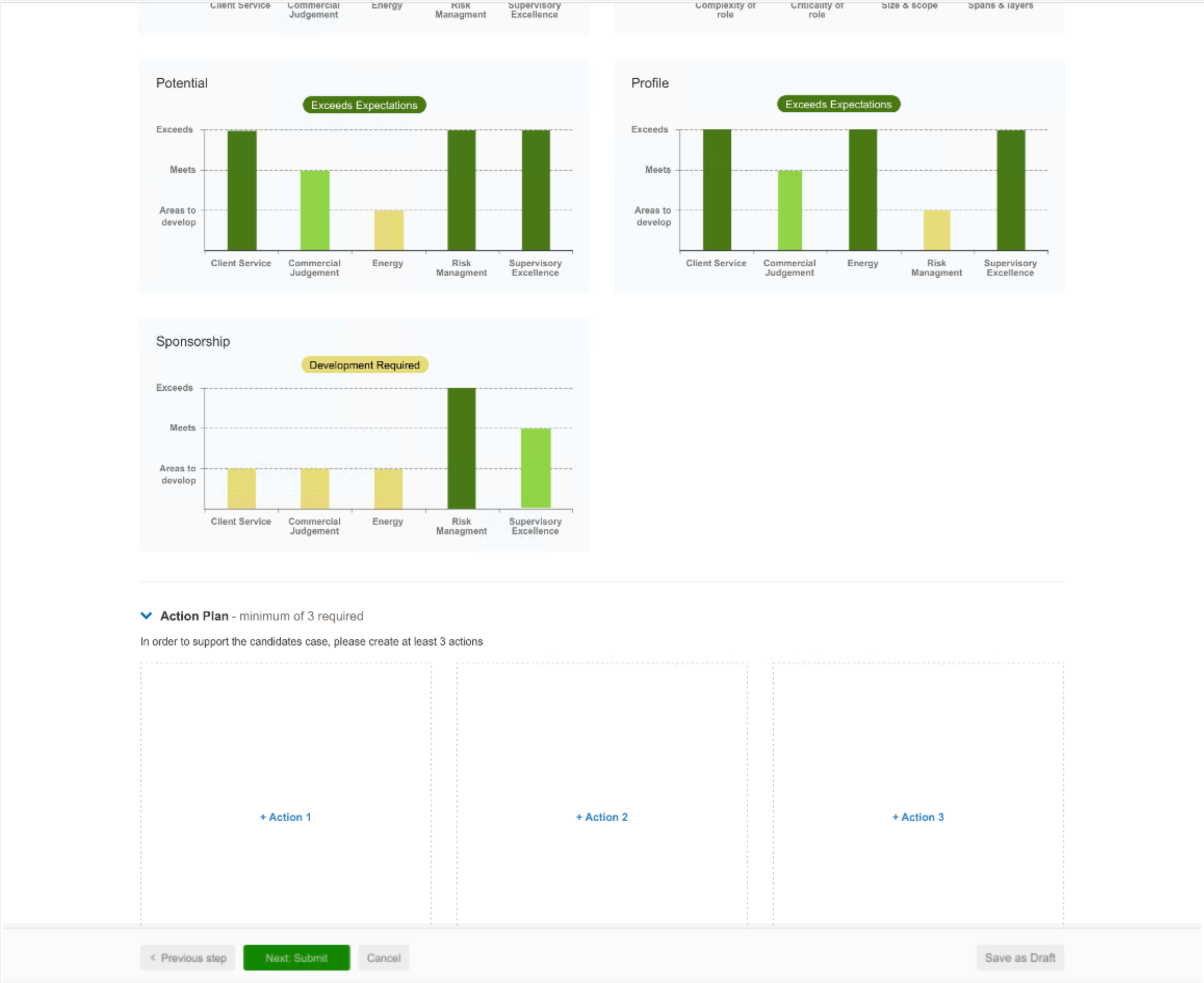
EARLY CONCEPT: Summary & Action Plan





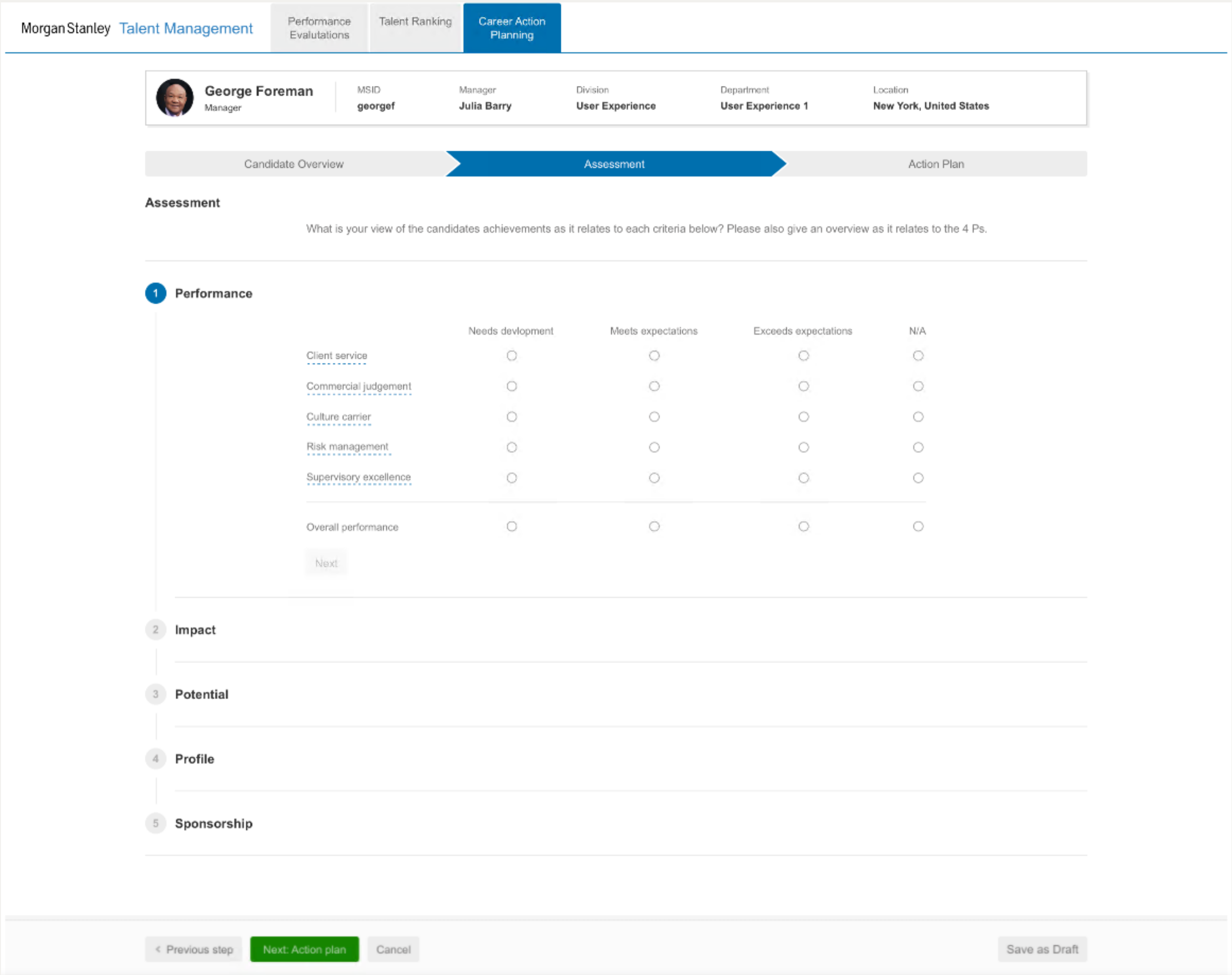
VISUAL DESIGN: ACTION PLAN





- 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

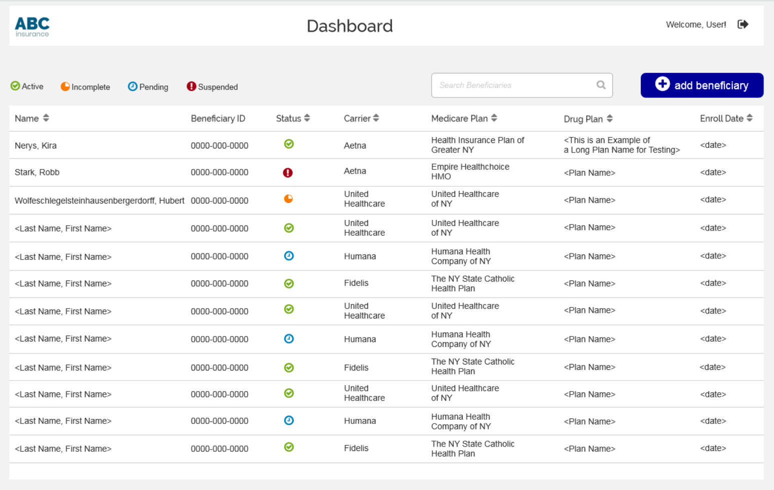


5 TRUSTY.care: A HEALTH INSURANCE STARTUP

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

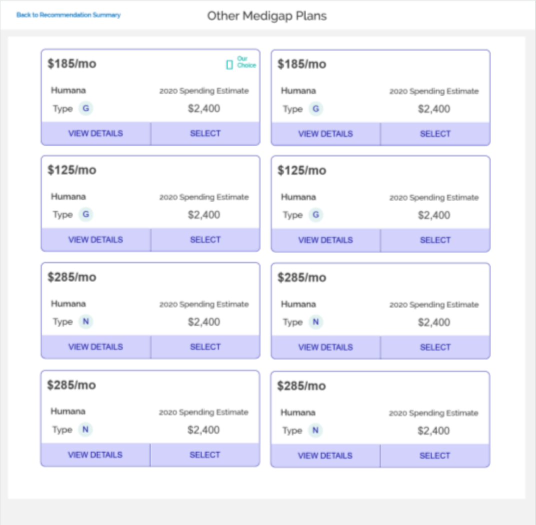
Finding a Medicare plan can be an absolute nightmare for senior citizens–and for insurance brokers. Much of the relevant information is spread across unusable websites and in PDFs with microscopic text.

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 *and* their senior clients, helping them find a plan without the pain and stress.

Project Scope

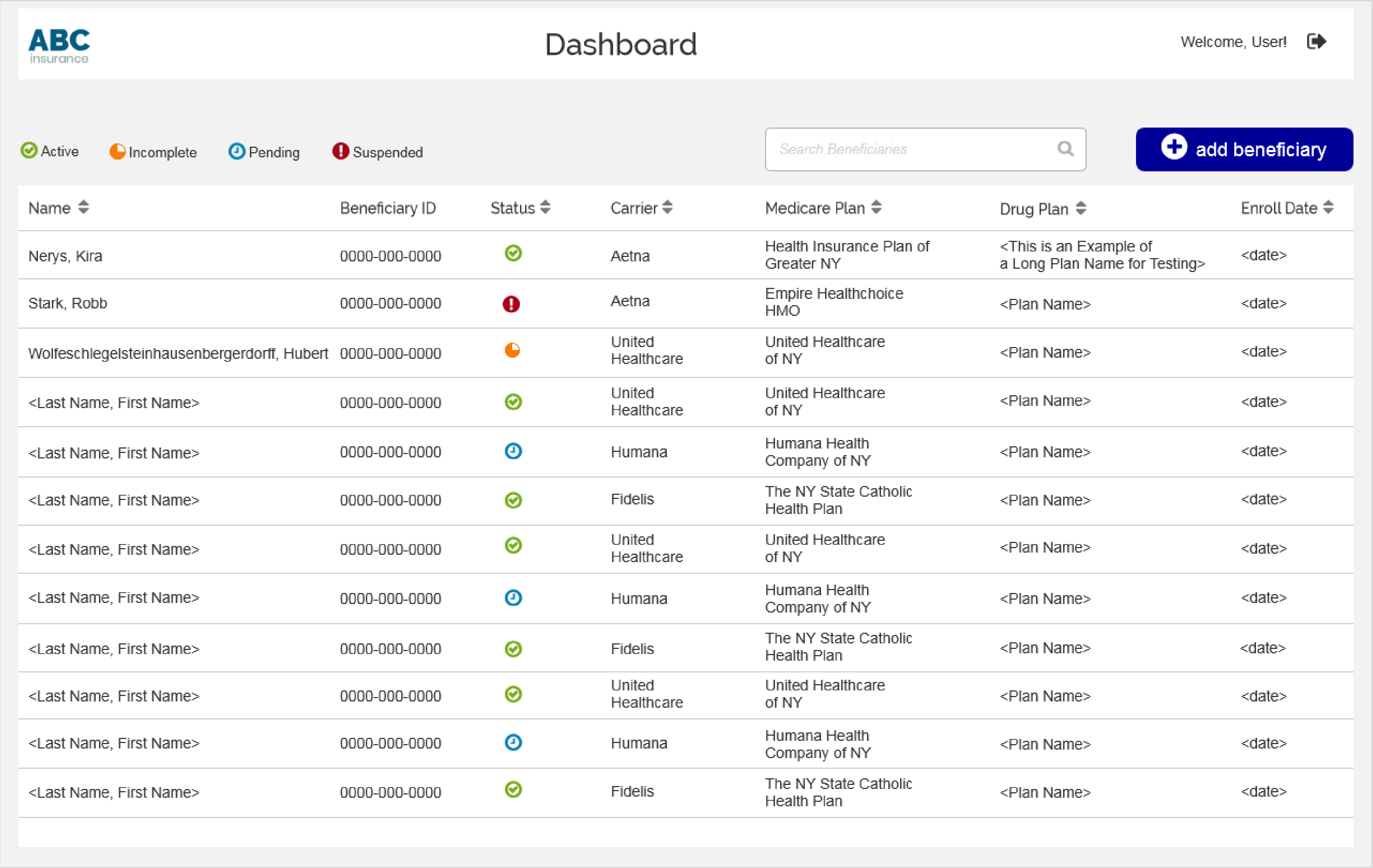
The goal was to overhaul the beta version of the app and build out a V1 for broader release.



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

BROKER DASHBOARD



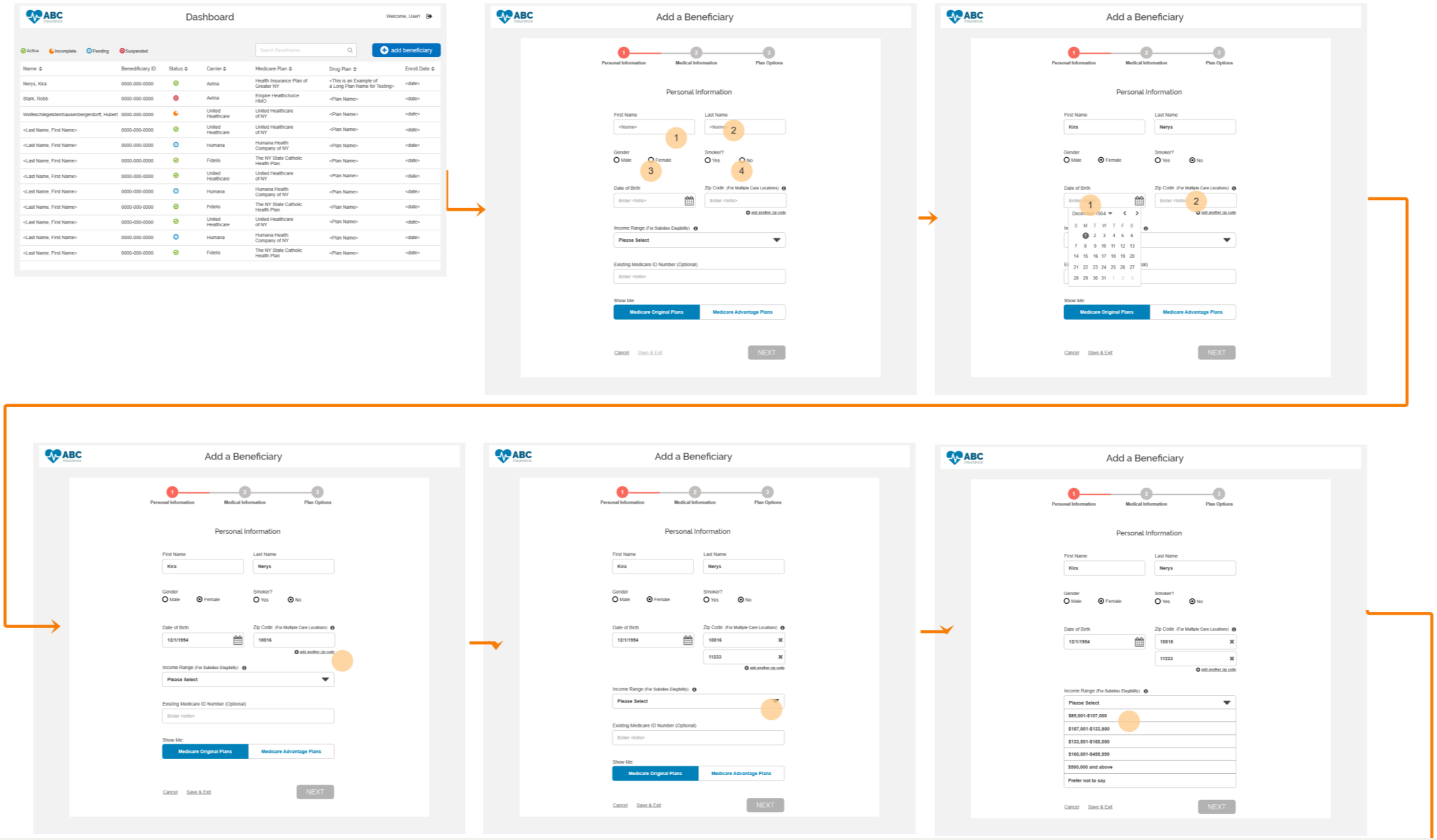
Name	Beneficiary ID	Status	Carrier	Medicare Plan	Drug Plan	Enroll Date
Nerys, Kira	0000-000-0000		Aetna	Health Insurance Plan of Greater NY	<This is an Example of a Long Plan Name for Testing>	<date>
Stark, Robb	0000-000-0000		Aetna	Empire Healthchoice HMO	<Plan Name>	<date>
Wolfeschlegelsteinhausenbergerdorff, 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>

Design Rationale:

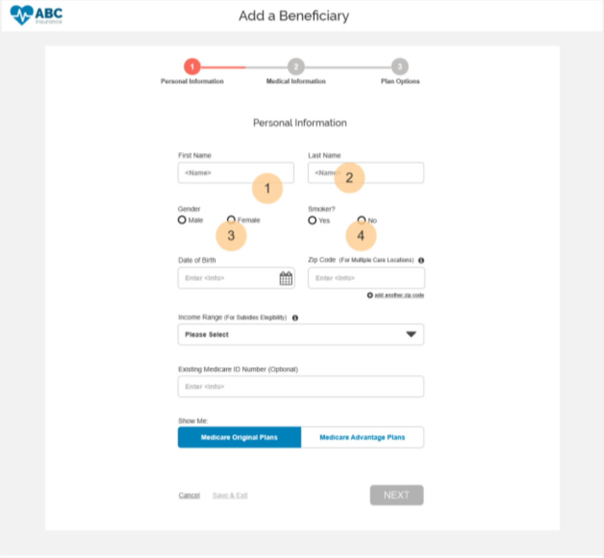
- The Broker was designed to display a list of beneficiaries the broker worked with, giving them just the most relevant information at the top level of the UI
- The Broker can click on any beneficiary in the list or search for them & drill down, in order to view/edit their details
- This user group is 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

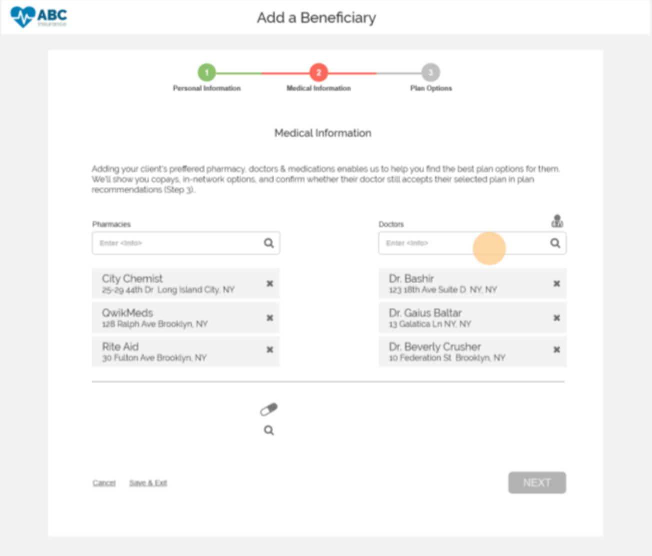
WIREFRAMES SAMPLE

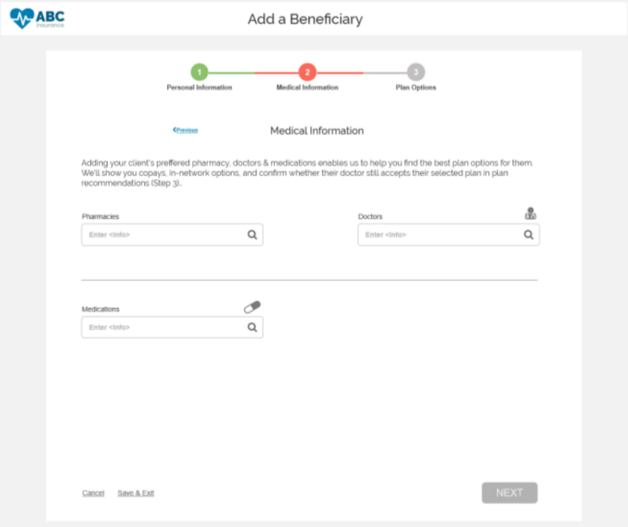
ADD BENEFICIARY [FLOWS]

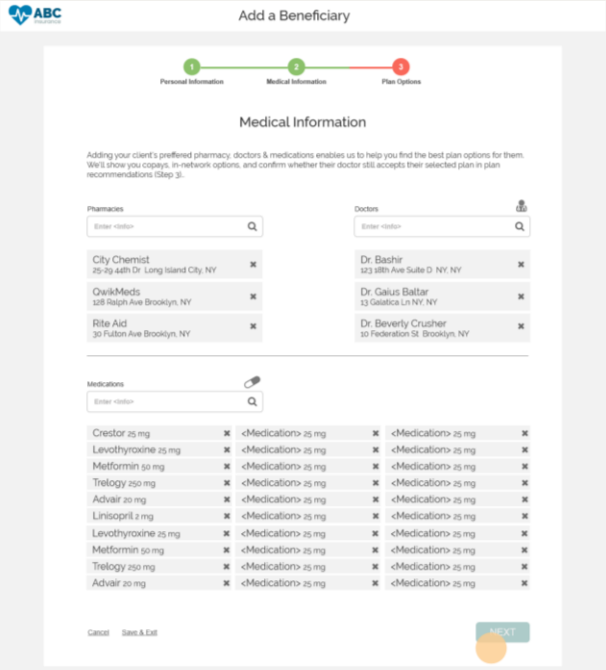


ADDING A BENEFICIARY

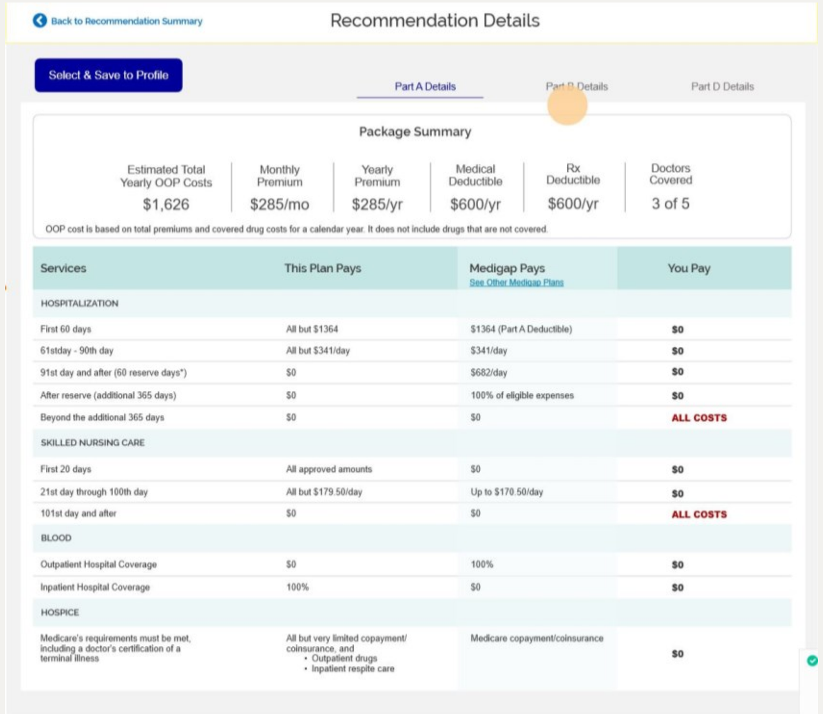


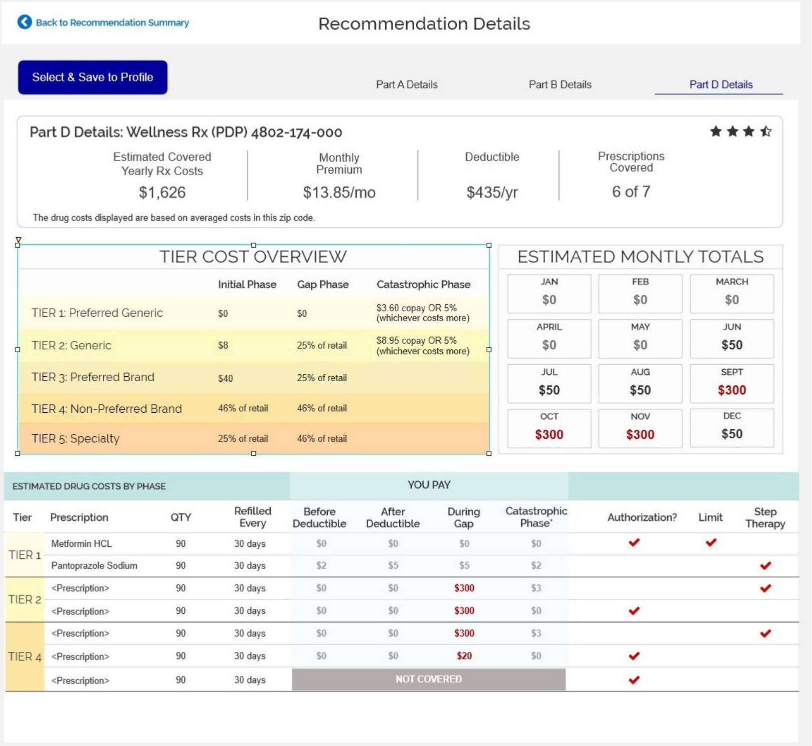






PLAN DETAILS





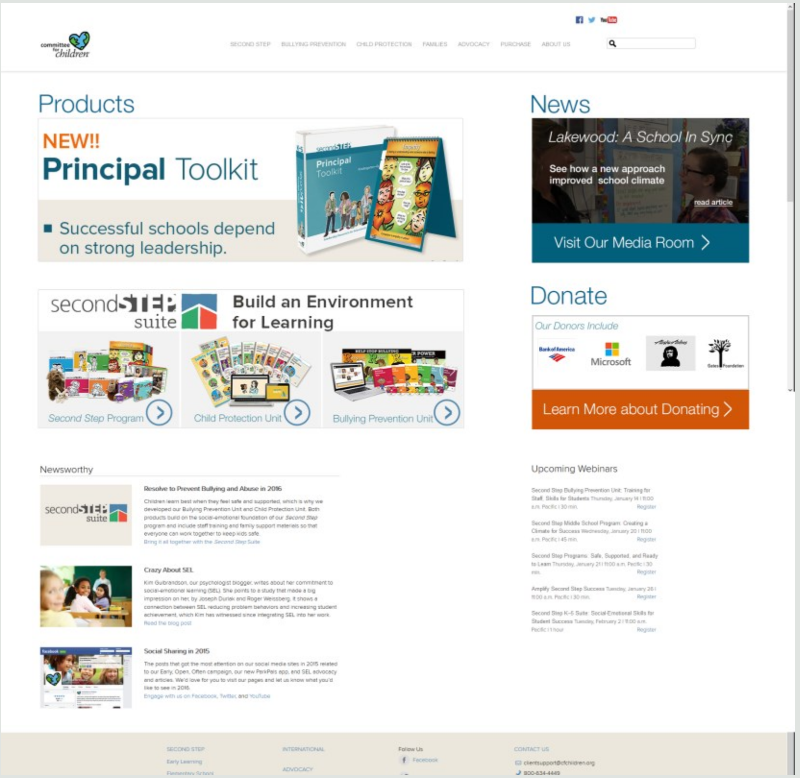
NOTE:
- I was *not* the Visual Designer on this project. Trusty had an in-house Graphic/Visual Designer who did all the branding and visual design.
- My role on the Plan Details was focused on Information Design, figuring out how to fit an enormous amount of detail into a consumable screen.

- 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

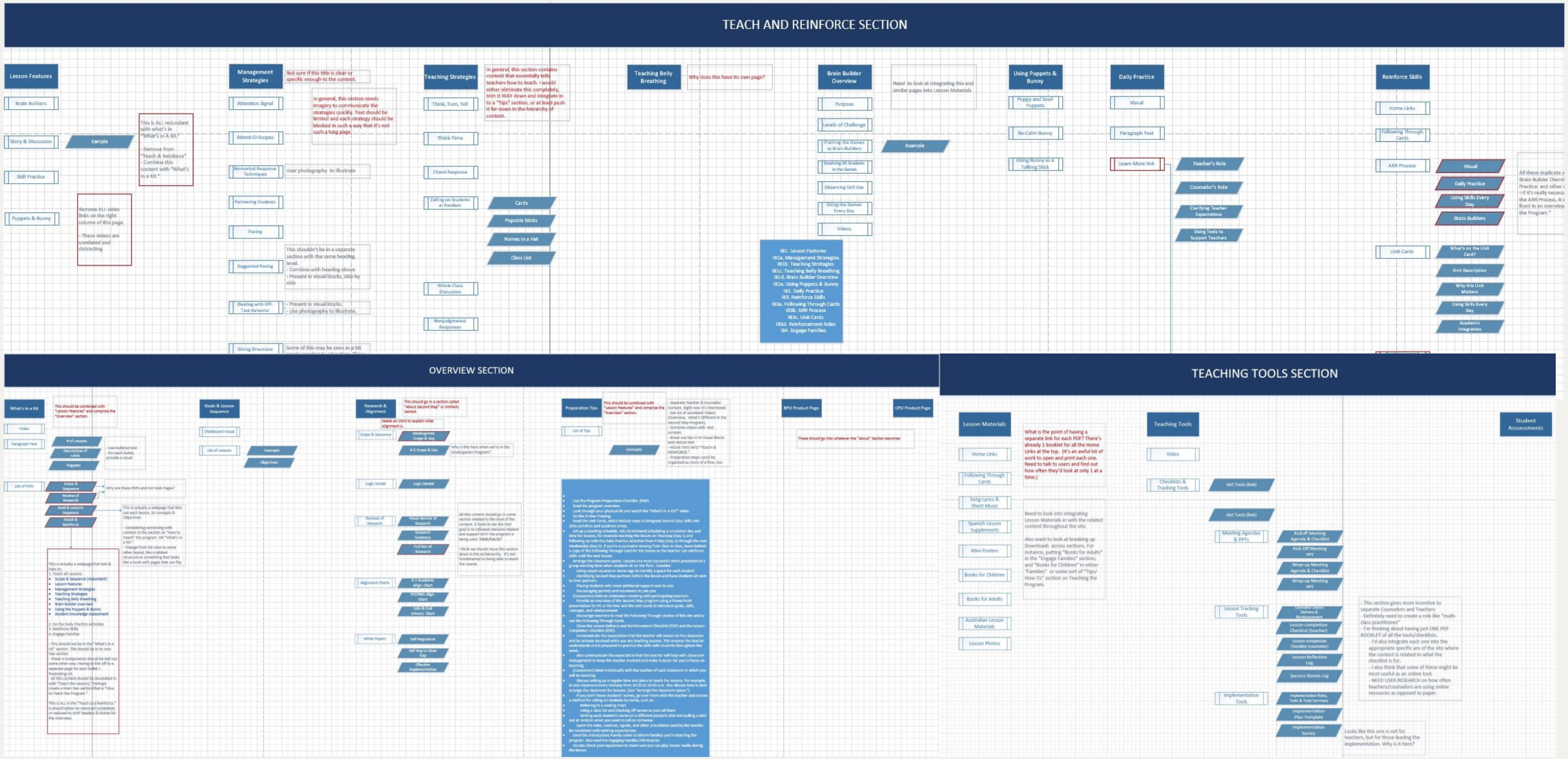
6 COMMITEE FOR CHILDREN: LARGE SCALESITE REARCHITECTING

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

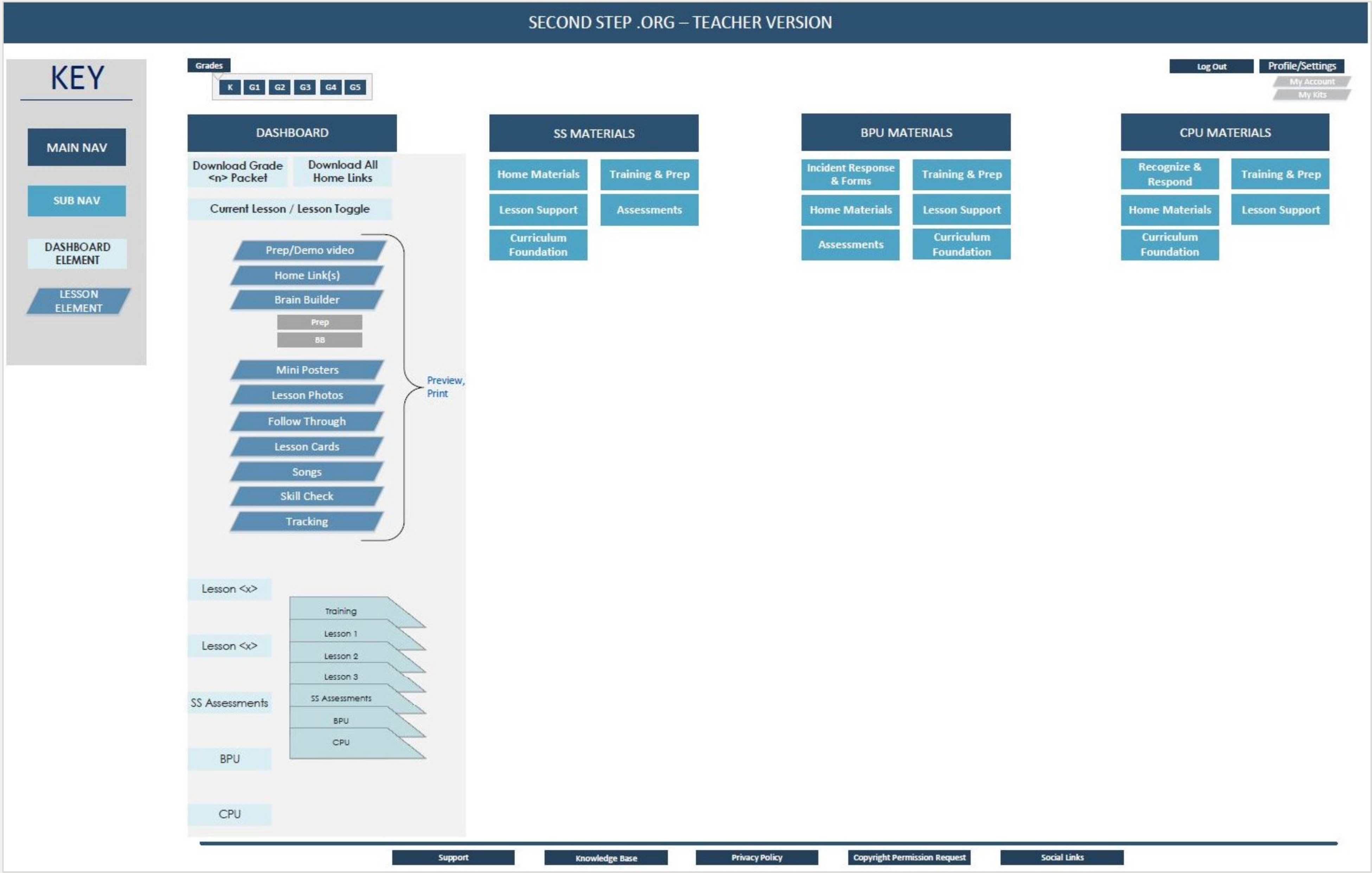


OLD INFORMATION ARCHITECTURE

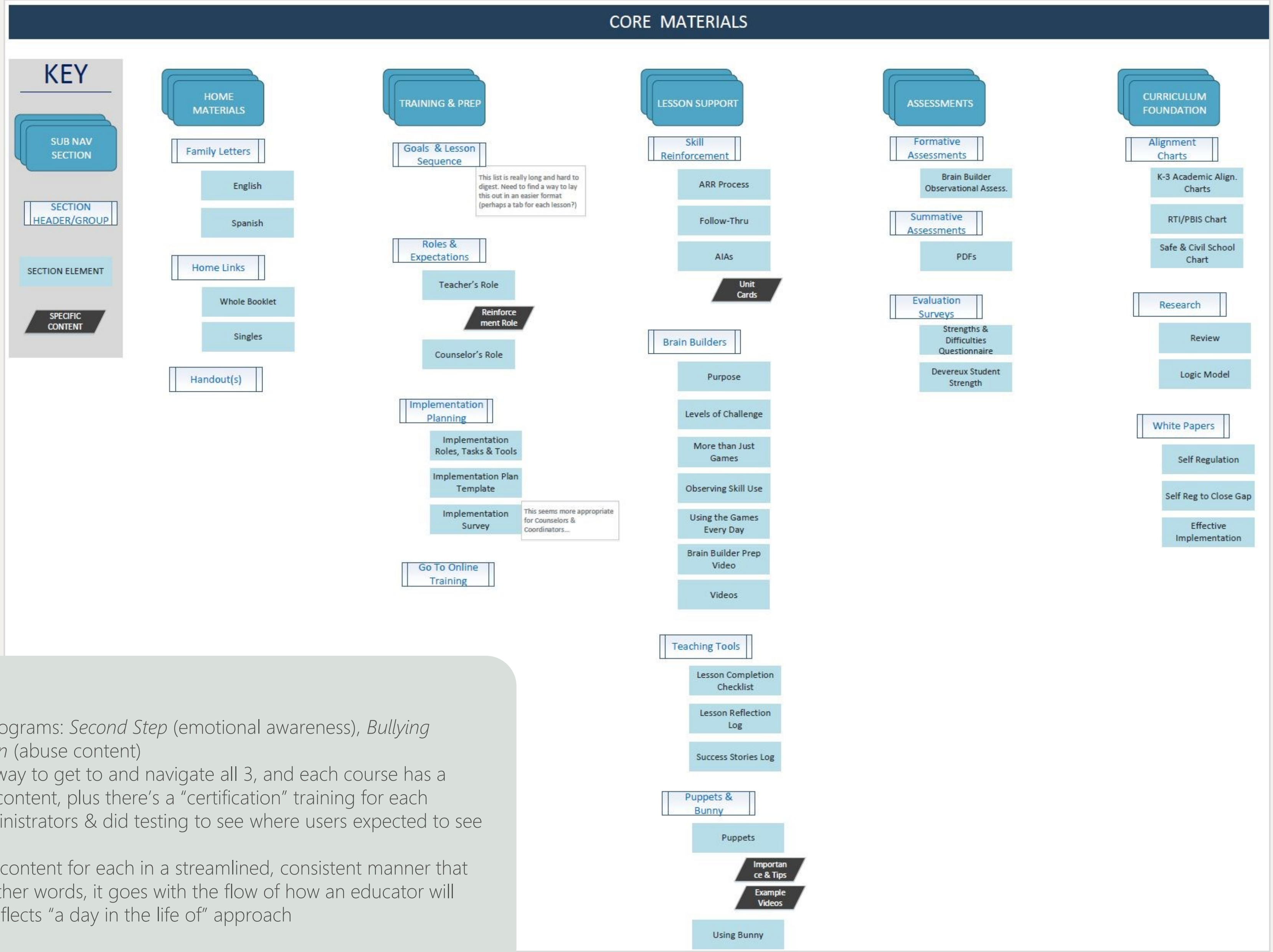


FOR REFERENCE: This is just a *part* of the *old* IA, marked up with my comments & questions

NEW INFORMATION ARCHITECTURE



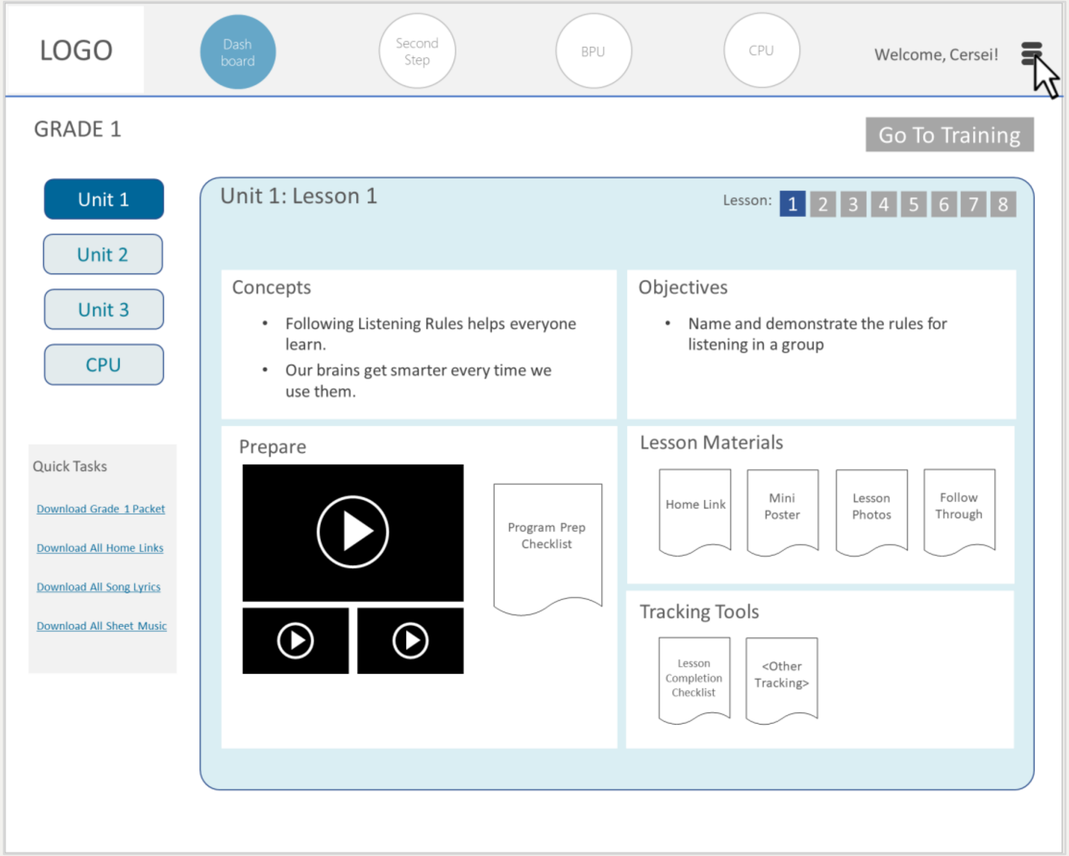
NEW INFORMATION ARCHITECTURE



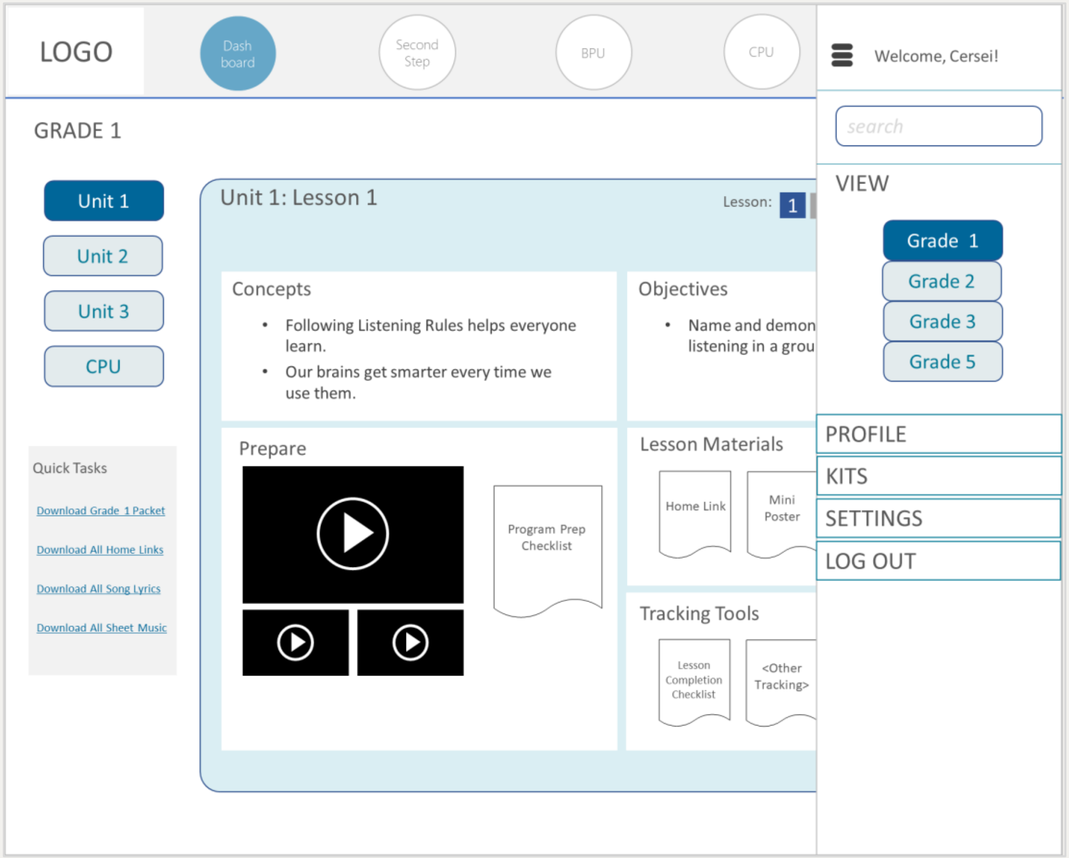
Design Rationale:

- 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.***

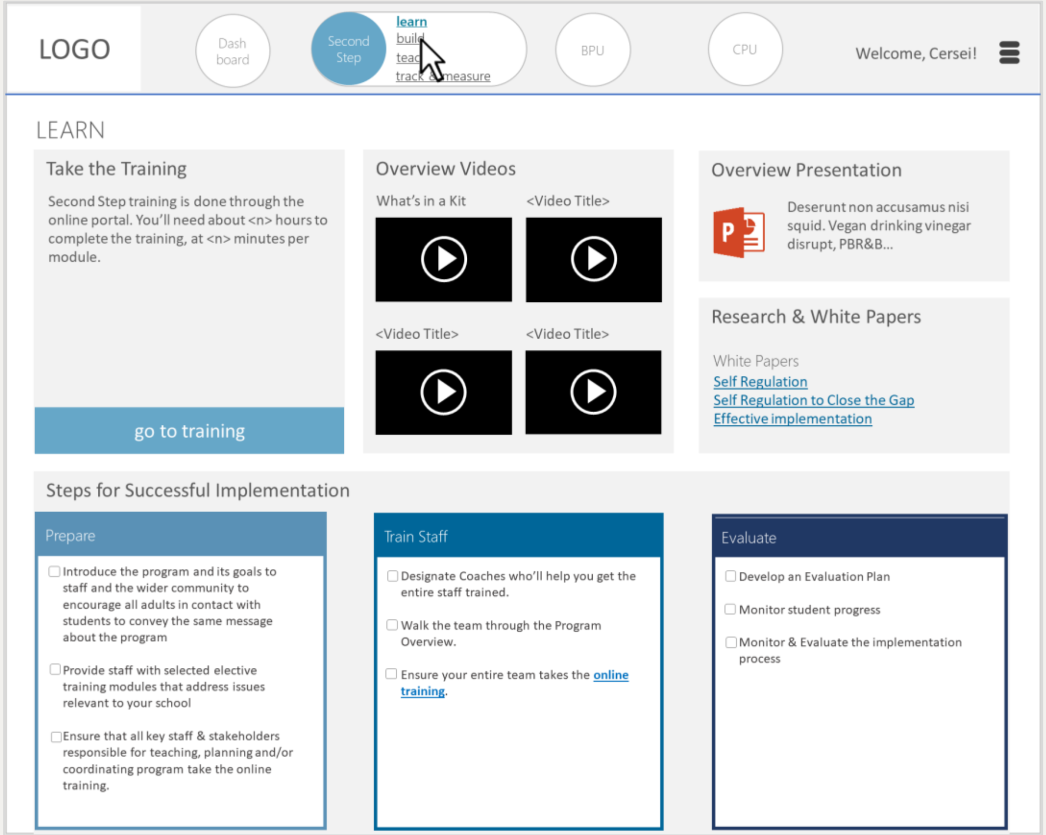


The hamburger menu houses Secondary & Tertiary tasks that would otherwise clutter up the Main Nav.

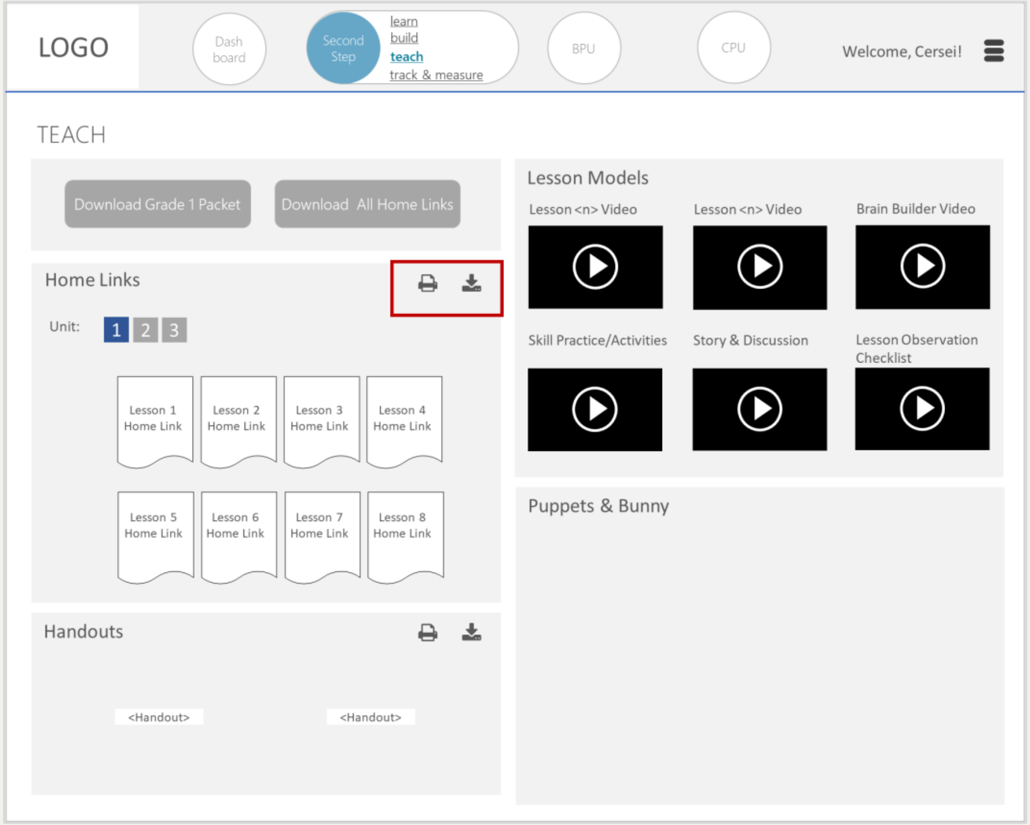
Design Rationale:

- 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.

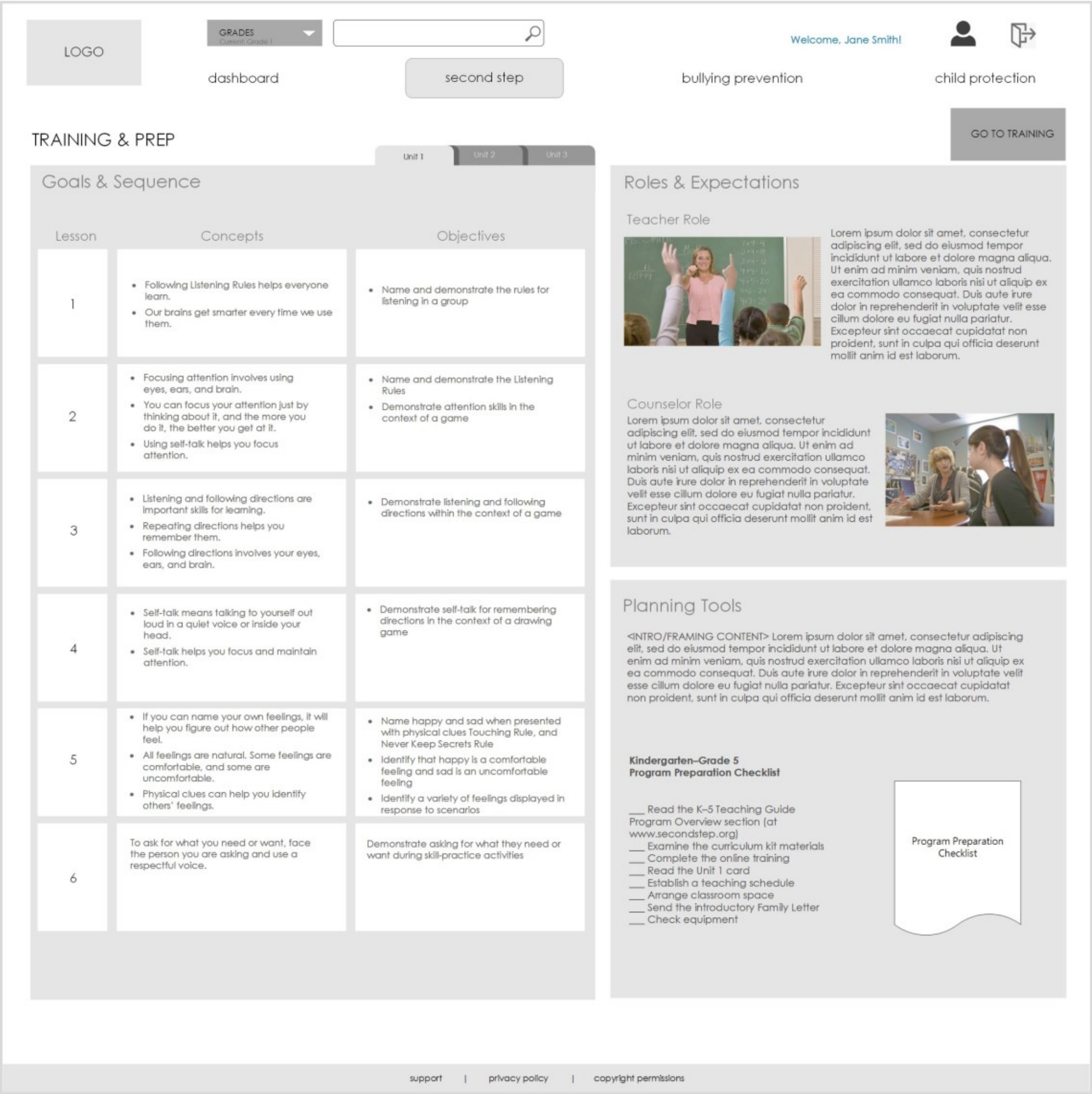
Hovering over any document thumbnail will invoke the PRINT & DOWNLOAD icons for that specific document.

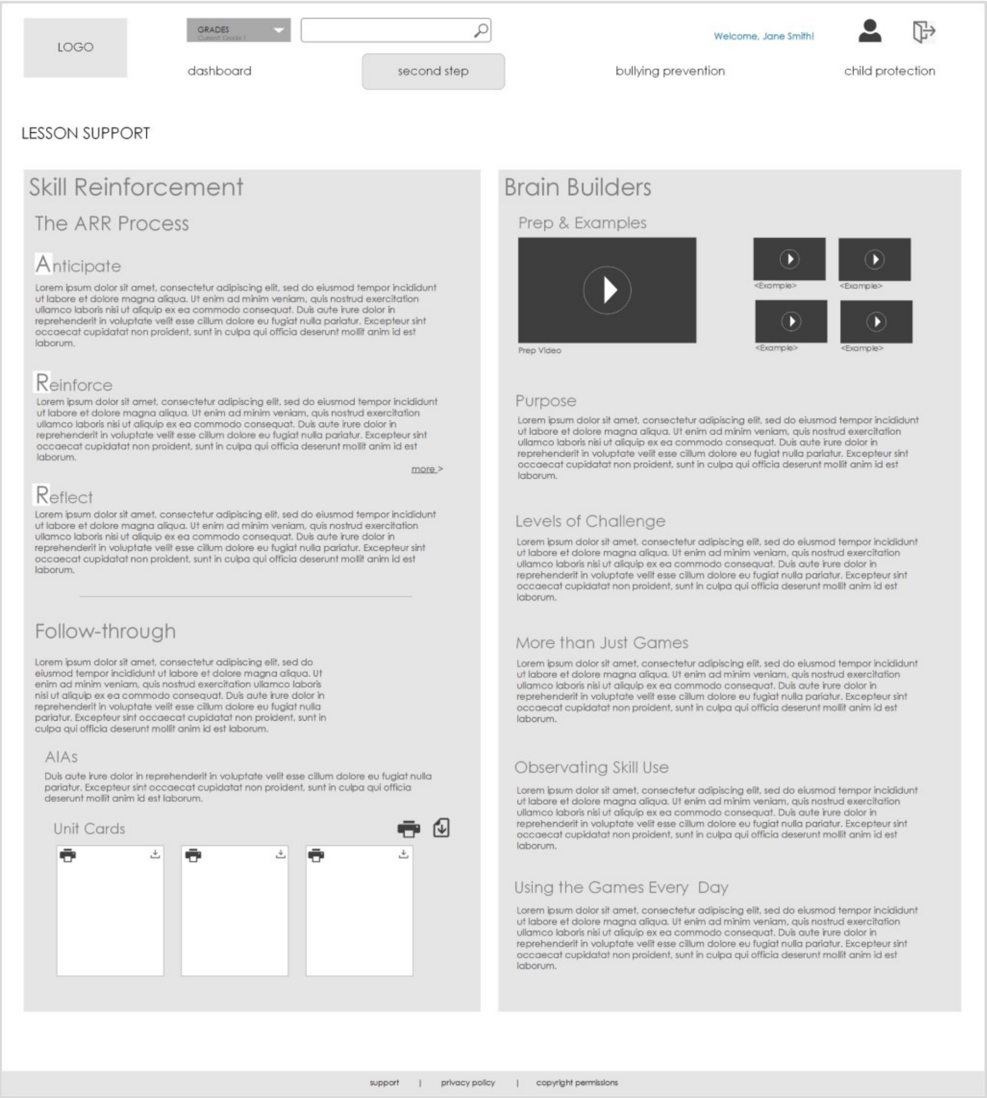
NOTE: These paradigms are consistent throughout the site UI.

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





FUNCTIONAL SPEC SNIPPET

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.	

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 **in**valid, a visual indicator will display to indicate it's invalid.	