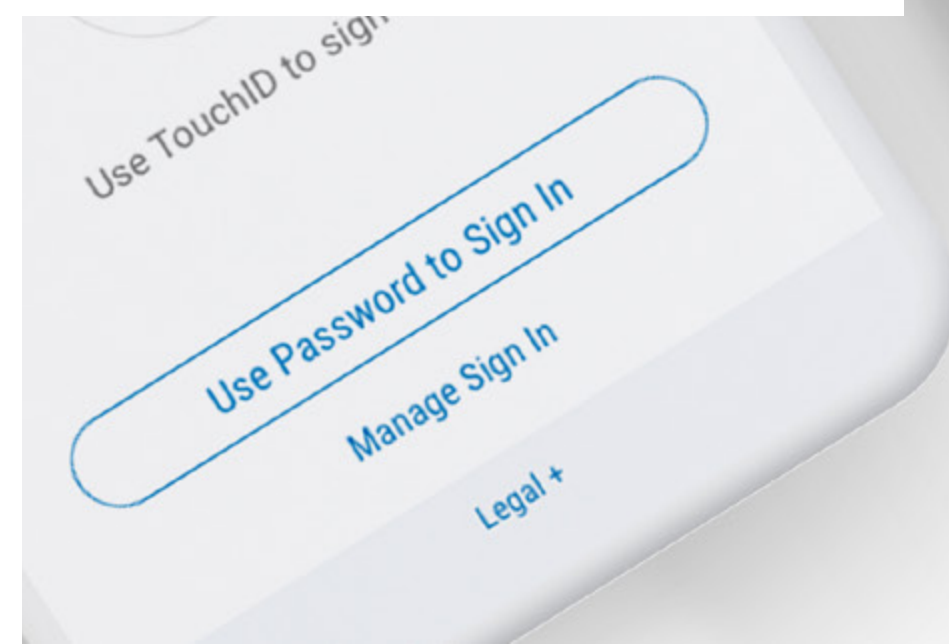




The work of Jonathan Steinberg

A VISUAL JOURNEY

A UX love story that inspired someone, somewhere.



INTRO

01. A little about me

Father/Husband/Dog Person/Design Nerd

When the moment strikes and I need inspiration, I rely on the other things that I love: A nice smooth whiskey (or bourbon), a great live show (music or otherwise), a slobbered toy (proud father of two furry children), the smell of an old barn (treasure hunter), the smell of grass and fresh air (urban outdoors man), or the gentle little hand of the craziest and best little girl that I know (extremely proud father of a sweet brown-eyed beauty).

Live. Breathe. Design.



THE DESIGNER JOURNEY

Passion for people & thoughtful design.

As a seasoned and innovative leader with 15+ years of industry experience, I have an extensive background in client development and human-centric experience design. I am committed to using innovative technology and leading methodologies to create disruptive solutions that empower businesses to innovate.

Design is never done. Just done better.

[View Resume](#)



[Linkedin](#)



CURRENT ROLE

IBM - Americas Design Practice Lead | Client Engineering

I am the Head of the Americas design team for IBM Client Engineering where I oversee and manage the design practice for the 80+ members of the human-centered teams on two continents. Working closely with leaders of each discipline (Data Science, Engineering, Sales, Account Reps), I lead and advocate for the human-centric methodologies that explore the business landscape for C-Suite Leadership and Fortune 500 Companies and validate where IBM hybrid-cloud technology can provide the greatest business value.

PREVIOUS ROLES

iRobot, Inc. - Principal User Experience Designer

Bottomline Technologies - Lead User Experience Designer

SPRK Interactive - Principal/Owner

STARTUP AGENCY

Curriculum Associates - Lead User Experience Designer

Liberty Mutual - Lead User Experience Designer

GYK Antler - Associate Creative Director

OVERVIEW

HOW I MAKE AN IMPACT

Here is a deeper view of the work and accomplishments for 2022. It was a busy and very productive year with a lot of growth and learning.

[VIEW FULL 2022 ACCOMPLISHMENTS - XLS](#)



The screenshot shows an Excel spreadsheet with the following content:

Jonathan Steinberg - 2022 Accomplishments and Initiatives

PROGRAM LEADER - Is recognized as a thought leader who is helping mature the Design program itself. Has successfully demonstrated the ability to coach, mentor and teach this skill to managers and leaders with positive impact on business outcomes for those teams or organizations. Demonstrated thought leadership with executive levels within clients, Client Engineering and other organizations within IBM

Initiative	Role	Details	Feedback
Client Facing	IC/Practice Leader	Besides direct involvement in client work, I supported many projects by guiding teams on best practices, approaches to the engagements, workshop development, and presentation/story-telling help.	
[Client-Facing] JPMC - AIOps	Design Coach/Lead	Pitched Garage Method, Framing & Discovery Session (x2), Solutioning set with additional Stakeholders (Consumer & Community Bank and Global Network). Internal Activities to Progress Engagement: Internal Framing, Quantitative Research Expanded single opportunity to multiple stakeholders and LOBs https://trellio.com/c/PLk0YCYW/995-jp-morgan-aiops	
[Client-Facing] Frontiers of Design	Design Coach	Worked with Sergio Borger to help finalize his workshop series. Was a mentor and coach and provided design guidance and insight. Attended the in-person workshop in NY.	
Organizational Client Engineering Focused	IC/Practice Leader	Besides direct involvement in client work, I supported many projects by guiding teams on best practices, approaches to the engagements, workshop development, and presentation/story-telling help.	
Value Engineering Method & Assets	Lead/IC	Working with executive leadership, co-created and advocated for the new methodology for Client Engineering's multi-disciplinary teams that redefined how we work and talk about ourselves as an organization.	"Team, Thank you for the significant contribution you made in creating a critical role into the success. This was an important role for IBM and our clients." - Chris Konarski
VEM Playbook	Lead/IC	Contributor and SME to lead in the building of the playbook—driving content strategy, design & development best practices, and overall goal achievement.	
CE On-boarding (All Roles)	Program leader	Established a team and led creation of current lesson plan for Design Thinking training for all roles for new hire on-boarding in CE. [Be a CE] Continuous conversations and collaboration with WW enablement team for role-based on-boarding and continued education	
STARS	Program leader	Led internal workshops for requirements with the UKI team, CSM, and WW leaders. Worked in unison members of the leadership team (Rizwan (BTL lead) and Rachel Reinitz, etc) to define the overall goal and path for STARS. Led designers in design of future state of STARS. Project was moved to Seismic, I have stayed on to help manage project.	
STARS - 1-Pagers	IC	Worked with Norbert and WW dev team to define the Case Study output from the new STARS program.	

Organizational Client Engineering Focused

Value Engineering Method & CE Assets: Working with executive leadership, co-created and advocated for the new methodology for Client Engineering's multi-disciplinary teams that redefined how we work and talk about ourselves as an organization.

CE On-boarding (All Roles): "Established a team and led creation of current lesson plan for Design Thinking training for all roles for new hire on-boarding in CE. [Be a CE]"

Continuous conversations and collaboration with WW enablement team for role-based on-boarding and continued education".

S.T.A.R.S. Use Case Repo: Led internal workshops for requirements with the UKI team, CSM, and WW leaders. Worked in unison members of the leadership team to define the overall goal and path for STARS. Led designers in design of future state of STARS. Project was moved to Seismic, I have stayed on to help manage project.

Cross-Org Partnerships & Enablement: Presented the CE mission and VEM to 400 members of the CSM & ATL community during their Brilliant & Basics series. Led a team of designers and ran "hands-on" bootcamp sessions with the CSM to experience the EDT practice. Meet weekly with CSM Leadership to help guide the CSM org through design & facilitation best practices. There are no designers in CSM, so we work together.

Technology Patterns & Accelerators

Customer Care: Created and implemented enablement, training, and client-facing material for the CC Jumpstart program. Created client message and content. Developed & ran multiple enablement sessions for 60+ designers & BTLs. Continue to be SME with Xinlin Wang

<https://w3.ibm.com/w3publisher/client-engineering/tdp-accelerators/customer-care>

<https://ibm.biz/CustomerCareAccelerator>

AI Governance: Partnered with Sales, Tech, and BTL-Leads to Co-Created pattern and engagement approach process for workshops. Currently working on SK01 planning and messaging with team.

<https://ibm.seismic.com/Link/Content/DCdm7WD2X7G8X8HHVmcC4QgqBVX3>

Designer Community: Program Leader

Mentoring & Leadership: I meet with individual designers often to discuss challenges, client work and approaches, career path & opportunities, life, successes, and any other topic to guide and elevate them to success.

Designer Role Definition: Ran internal research sessions (10+) with the Client Engineering community (75+ members & 5 different roles) to create a multi-perspective approach and recommendation. Harvested and synthesized data.

Created the current designer role definition, how it aligns with the greater IBM organization, and how leadership team can best utilize the unique skillset of the designer

Community of Practice: Established and oversee a market-based design leadership board, with recommendations from Market leaders, to represent each market, provide leadership to designers, harvest assets, communicate best practices, and deepen the design community.

Designer Hiring & Promotion Process: Worked with the CE HR & Intern/Early professional hiring teams to establish a framework and interview process for all new incoming design hires. Established a series of checkpoints and defined the hiring criteria for the selected panel of interviewers to follow.

Design Org Patterns: Advisor

Active leadership advisor for the Design Education Workgroup that was established to help support the Pattern's continuous learning experience for IBM Designers. As an advisor and contributor I bring in a diverse perspective to the design process as a representative and leader within CE.

Executive Development Course

Partnered with Joni Saylor and the DPO office to create and implement an executive training course that outlines the role of design.

SPARK Design Festival

Presented at the SPARK Design Festival as a representative of the Client Engineering Design Community.

Give Back

P-Tech Lead & Coach | IBM Design Org Mentor | Design-for-Good Participant | Mentor at Design.org

WHAT PEOPLE SAY

THEY ARE MIGHTY NICE.

2021 TECHNOLOGY SALES RISING STAR

<https://w3.ibm.com/w3publisher/ibm-technology-sales-hub/rising-stars/4q-2021-rising-stars/jon-steinberg>

"Jonathan is an amazing asset to the Client Engineering team. His knowledge, demeanor and ethics have made him a leader in CE. He is always willing to step in and be part of the team, sometimes to his own detriment. He has a passion for design and for the practitioners that make up the larger design team here in CE. He is a confident leader who works to bring common ground to places where it hasn't been before. I look forward to working with him and continuing to see him grow into a more dominant voice in the overall IBM Design ecosystem. I have enjoyed my time working with him and always trust that he can and will do what he says can be done. Trust is hard to come by in the world today but he instills that trust easily with his peers, his teams and his clients in a way that isn't forced or false. Thank you for all of your help this year! You truly are an asset to our team."

- Jim Pullen, Principal BTL Lead - Americas

"Thank you, thank you, thank you for one of the best Customer Success Brilliant at the Basics sessions we have had. The messages you and Jessica delivered were key to our CSMs. They now have a much better base understanding of Client Engineering--how and when to team. I know we are excited to hear more over the next few weeks! I truly appreciate your expertise, your time, and your teaming."

- Ken Pollack, Principal CSM Manager

"Jonathan, Thank you for all your contributions as design lead for the Americas team. It's not easy to step into a role when the old leader is so close by...you have navigated the situation very well. Instead of being focused on yourself, you have been focused on the team and making a contribution. I have been impressed with your contributions to date and your maturity. Thank you!"

- Mike Zeigler, VP Technical Sales - Americas

"'Our top design talent in Client Engineering' is a common comment used to describe Jonathan at IBM. It's rare that you come across standout talent like Jonathan. However, good leaders rise above and make themselves known not only for their strong work ethic and dedication but also for the level of service and support they provide to those around them. From day 1, Jonathan has gone above and beyond to help amplify enablement, improve process, and help to build a strong design culture within Client Engineering at IBM. As one of the design managers and leaders in the organization, I've seen firsthand the positive impact Jonathan has had on our design community."

As Head of Design in the Americas, Jonathan has continued to build and strengthen our design culture, comprised of over 70 designers, streamline processes, remove barriers, and build a support network for the design community. His dedication to the designers, process improvement, and the organization has helped our teams create measurable outcomes for our clients."

I highly recommend Jon for a design leadership role, as one who has witnessed his prowess as an individual contributor, a top performer, and a natural leader. Please feel free to reach out to me personally for a recommendation."

- Shane Close, Principal Design Manager - CE

"Thank you for the great work you did for our 2022 intern program! Your investment in this program is greatly appreciated. It makes a huge difference for the interns and for IBM to have our talented team show these young professionals the ropes. We can't be successful without you!"

- Melissa Susselles, Territory Director - National Market CE

"Thank you for the significant contribution to the creation and successful launch of the Value Engineering Method. Everyone of you played a critical role into the success. This was an important next step for the client engineering organization to scale and drive even more value to IBM and our clients."

- Chris Konarski, VP Client Engineering - WW

"Dear Jon! Thank you for your energy and the work we were able to do together in 2022. I truly value your expertise, your passion and energy. I'm looking forward to work even closer with you in 2023 and create an environment for us and our designers to thrive. I wish you a wonderful holiday season with your family and loved ones."

- Norbert Riedelsheimer, Design Program Lead - WW

"Jon - Just wanted to drop you an appreciation for everything you have done for design this year. You are always there to push the boundaries of what CE design is and can be in the future. I know its a tough job, but we are lucky to have you in the captain seat. Thank you and keep up the awesome work!!"

- Justin Coble - Senior Innovation Designer - CE

"Thank you for all that you have done this year! I appreciate your aid, efforts, successes and accomplishments. You have made a difference in my work life. Thank you."

- Kris Pizzarelli - Senior Innovation Designer - CE

"Hey Jon! Thank you for being a great coach and supporting my first client engagement. You gave me awesome advice that will help me grow in my role. I appreciate all your time and patience!"

- Sylke Lopez - Innovation Designer - CE

02.

WORK & PROCESS

In other words, the goods.

WHAT WE WILL EXPLORE

IBM Specific

Value Engineering Method - Redefining the way we work

Selling Design - Designing and defining the design practice in sales

Extras

Make Digital Banking Great Again - Desktop & Native Platforms

So You Can Human - Hardware and Mobile Integration

Reimagine the Educator Experience - Data-Driven User Interface

Add-ons

Simplifying the Selection Process - E-commerce Checkout

Aligning Design & Ideals - Combining User research, user experience, and storytelling

But wait... [THERE'S MORE...](#)



LET'S CREATE VALUE WITH CLIENTS

Working with executive leadership, I co-created and advocated for the new methodology for Client Engineering's multi-disciplinary teams that redefined how we work and talk about ourselves as an organization.

Key Stakeholders

- Chris Konasrki, VP Client Engineering, WW
- Michael Ziegler, VP Technical Sales, Americas

Key Contributors

- Rachel Renitz, VP CE, IBM Fellow
- Xinlin Wang, Distinguished Engineer, CE
- Norbert Riedelsheimer, Design Practice Lead, WW
- **Jonathan Steinberg, Design Practice Lead, Americas** ← *Look Ma, it's me!*
- Leon Gouletsas, Design Practice Lead, APAC
- Rick Goldberg, Technical Sales Executive



[Read Chris Konasrki's Internal Release](#)



Opportunity:

TO REDEFINE HOW WE CREATE & DELIVER OUTCOME-BASED AND DESIGN-LED SOLUTIONS

In its creation, Client Engineering (CE) was rooted in the Enterprise Design Thinking 'Garage' Methodology that has brought IBM amazing success with clients. However, in a pre-sales environment, time can be a friend or foe, so CE needed to update the approach to client work in order to speed up time to delivery, while maintaining a high level of client success and value.

Target Audience

- CE GLOBAL SALES (1600+ PEOPLE)
- MULTI-DISCIPLINARY SQUADS

Timeframe To Launch

- 3 MONTHS

Risks & Challenges

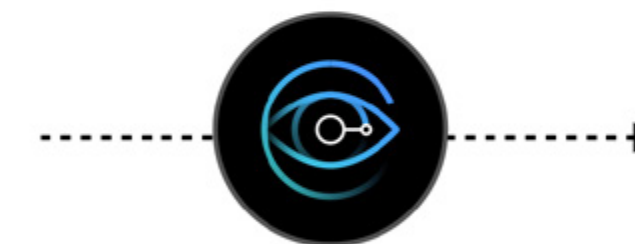
- TIME TO MARKET
- ENABLEMENT & ADOPTION
- INTERNAL & EXTERNAL EXPECTATIONS
- BRAND RECOGNITION (GARAGE)
- BEING NEW AND INNOVATIVE
- NEW TEAM AND ORGANIZATION

Internal view of Value Engineering Method

Note: There are 2 phases in the External Method = Innovate & Co-Create

Business Development

OPPORTUNITY GENERATION to identify value



Collaborate with account teams to identify proactively potential opportunity(s) for a PoX.

Approval needed to be considered client facing

INITIATE to plan for value



Initial compelling offer for the client.

INNOVATE to define value



**1st client meeting scheduled*

Internal view of Value Engineering Method

Note: There are 2 phases in the External Method = Innovate & Co-Crete

Business Development

OPPORTUNITY GENERATION

to identify value



Collaborate with account teams to identify proactively potential opportunity(s) for a PoX.

Approval needed to be considered client facing

Pre-Sales

INITIATE

to plan for value



Initial compelling offer for the client.

INNOVATE

to define value



** 1st client meeting scheduled*

PREPARE

to show value



CO-CREATE

to prove value



TRANSITION

to deliver value



Client facing time





Defining the Value Engineering Method (VEM)

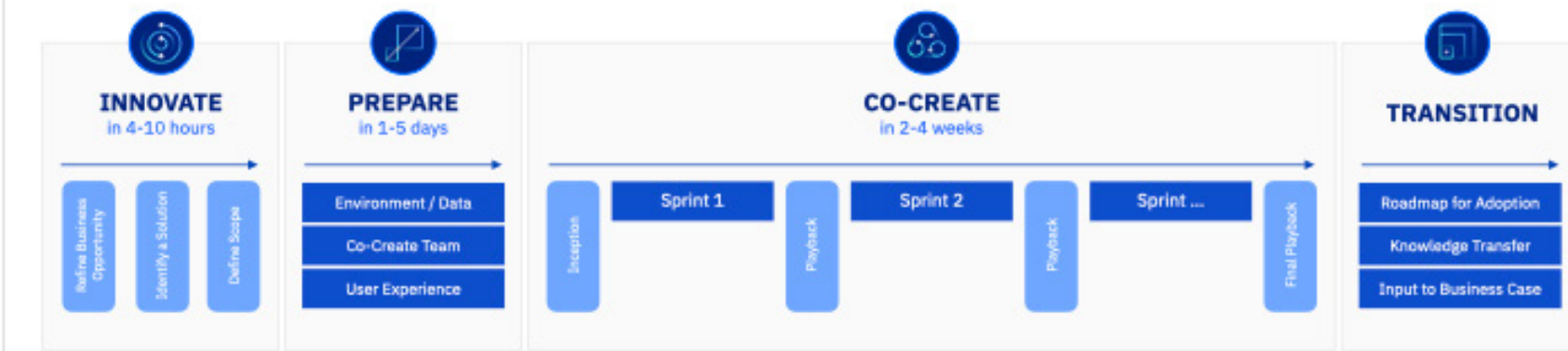
The Value Engineering Method is a human and design-led approach to solve complex business problems with transformative technology. This approach uses a proven co-creation methodology that aligns our experts, utilize leadership based on thousands of projects, with key client stakeholders to quickly identify business or technology challenges and build Proof of Experiences (PoXs) that solve and ‘de-risk’ those problems using IBM hybrid cloud and AI technology.

Each of the Value Engineering Method stages is intended to provide guidance and consistency for teams, while allowing for the variation of different scenarios and market needs.

[Client-Facing VEM Deck](#)

[VEM Playbook \(WIP\)](#)

Value Engineering Method



Across the VEM

Designers use client research practices to inform and inspire IBM Technology account peers and CE project teammates.

Why it matters

Designers craft bespoke guided methods to design for intentional collaboration experiences where teams build shared understanding, shape choices, and make decisions.

Design for VALUE:

Continuous client research drives continuous learning throughout the engagement, real time client insight can be leverage by everyone client insight to inform and inspire the next best action.

Value Engineering Method : Innovate



Outcomes for VALUE:

- [Add current value prop from CE collateral for each step]
- [Add designing for intentional co-creation experiences - before, during, and after sessions]

Designers use service design practices to examine the internal infrastructure of our client’s operations, as well as their internal client and external customer experiences

Potential Deliverables

- Client interviews
- Harvested & synthesized workshop playback that inform current decisions
- Rapid user tests
- Mid-fidelity wireframes/flows

Value Engineering Method : Prepare



Outcomes for VALUE:

- Add human point of view & perspective
- Design engaging and intuitive services
- Design for intention user experiences
- Design for intuitive experiences

Designers use qualitative research (interviews), user interface, and visual design practices to design for intentional user experiences.

Potential Deliverables

- Client interviews
- Harvested & synthesized workshop playback that inform current decisions
- Rapid user tests
- Mid-fidelity wireframes/flows



Defining the Value

No matter where you are in the process, we keep value in the heart of everything we do. For each engagement, the definition of value will differ depending on the business & user need, and the desired outcome defined by the client.

Value can be broken down into two categories:

01. Value to the Client

Confidence in a technical solution to their compelling business needs and accelerating time to value.

02. Value to IBM

Building deeper, trust-based, relationships with our clients.





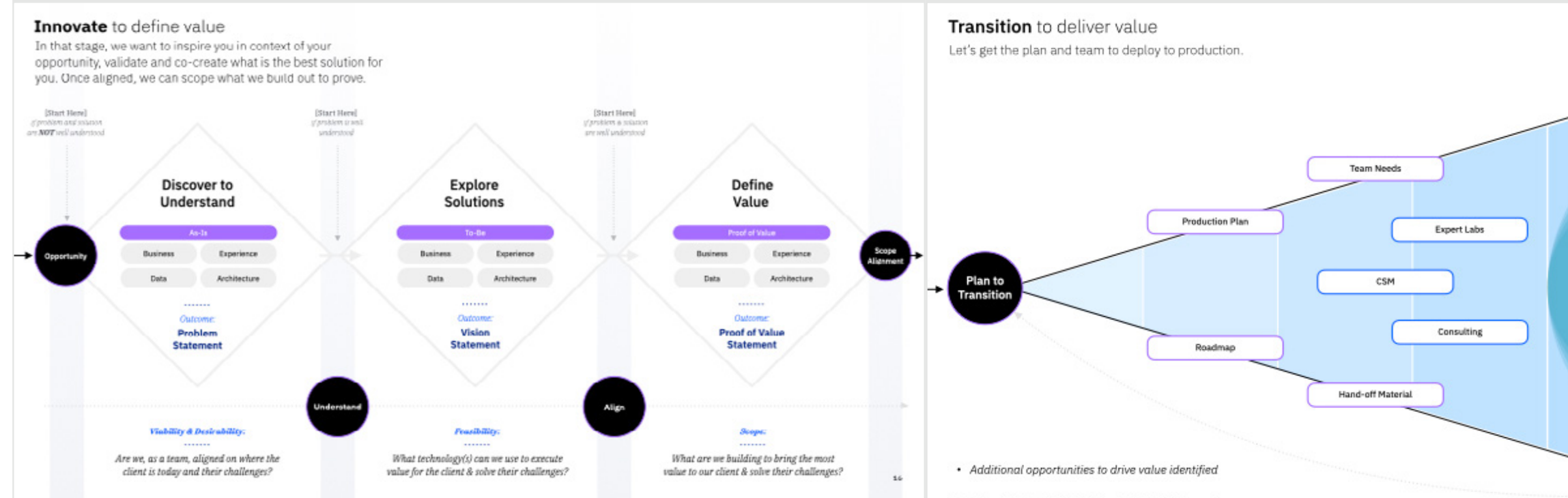
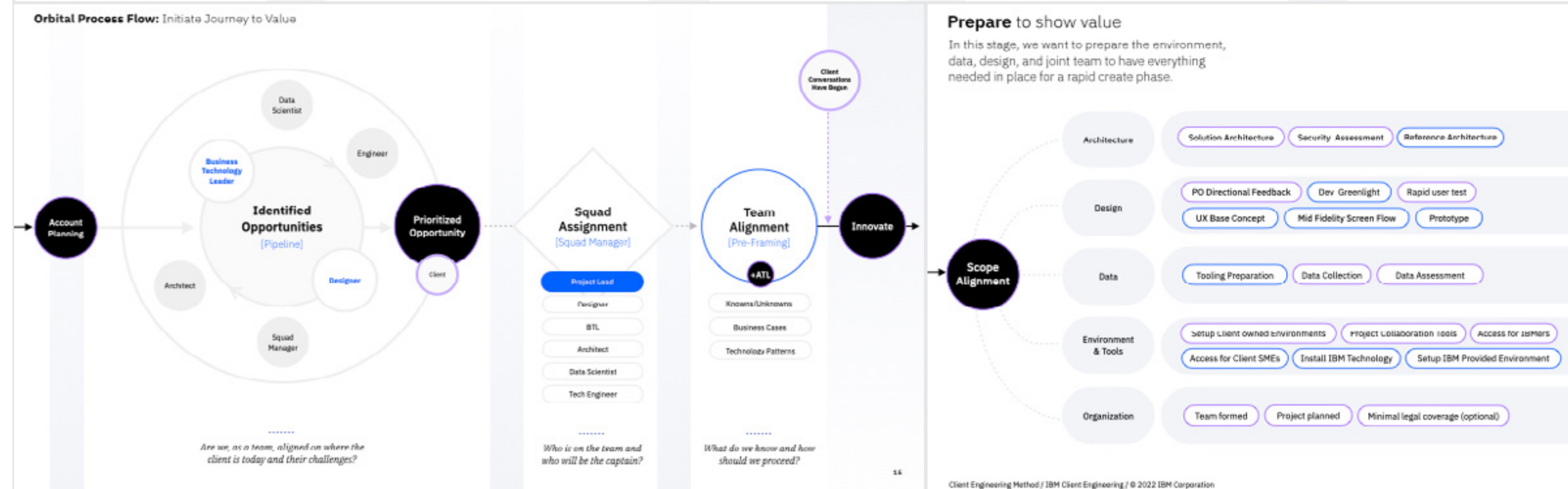
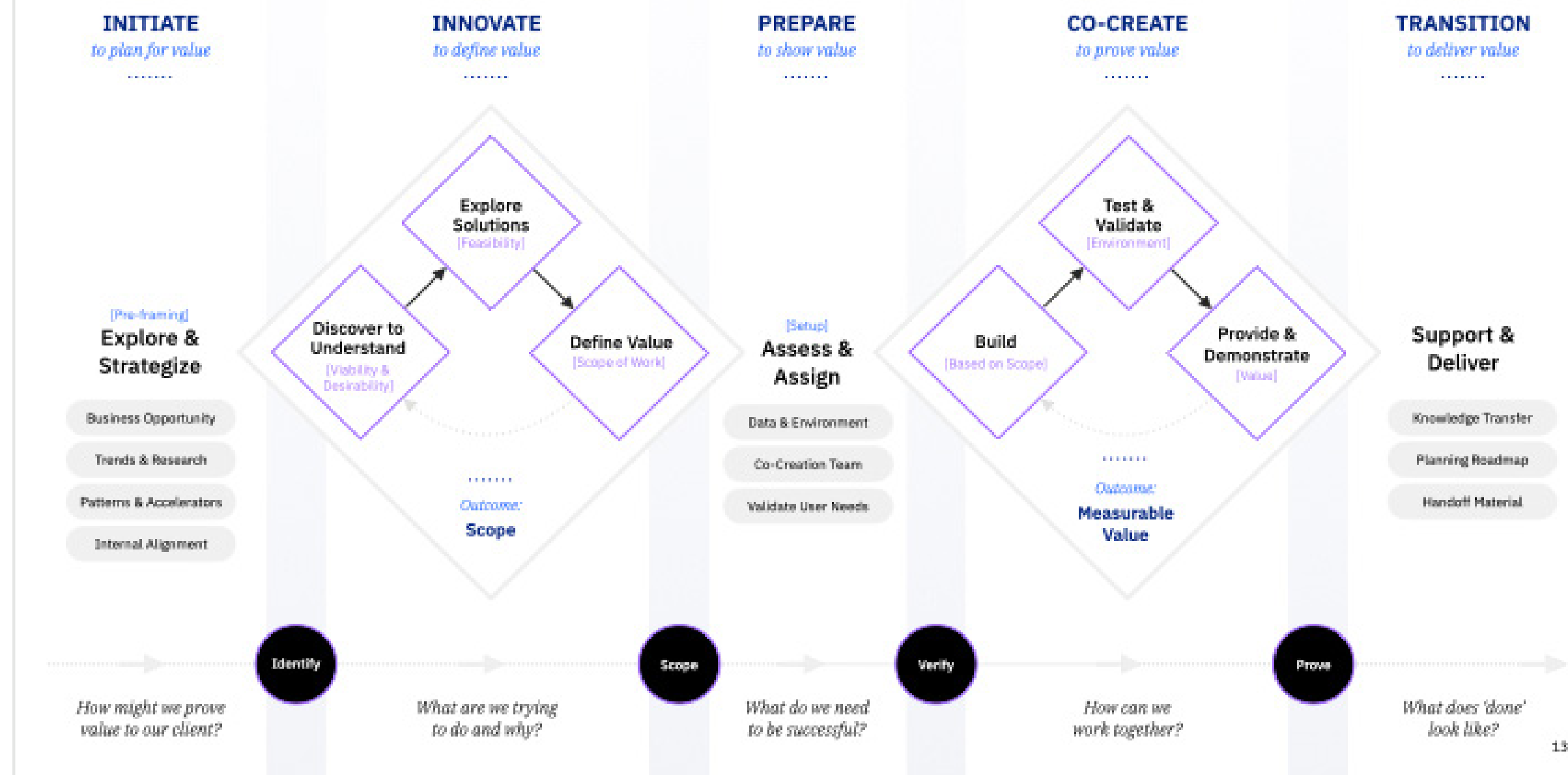
Visualizing the 'How-to' for implementing value

We often get caught up in the words and have a hard time telling the story. I created a visual process to illustrate how the Value Engineering Method works within Client Engineering — from Generation to Transition.

In addition to the VEM, I have also created a dynamic model called the 'Orbital Model' that encompasses our approach and moves away from the linear to the 3-Dimensional.

[View Orbital Design Model & VEM](#)

Value Engineering Method



LESSONS LEARNED

ABBREVIATED VERSION

- PROCESS. PROCESS. PROCESS.
- DON'T BOIL THE OCEAN. MAKE IT SIMPLE.
- WORK TOGETHER.
- DON'T GET CAUGHT UP IN THE SMALL STUFF.
- ASK QUESTIONS.
- DOING IT FAST IS NOT ALWAYS FASTER.
- MINDSETS TAKE TIME TO CHANGE.
- CHANGE BRINGS OPPORTUNITY.
- SAY IT QUICK, OR DON'T SAY IT AT ALL.



SELLING DESIGN IN A SALES ENVIRONMENT

The landscape for the design practice in Client Engineering changed dramatically in the beginning of 2022. As the practice lead, it was my job to get the 80+ Americas designers back on track and moving forward. I started an effort to align the global community of designers (200+) based on the input and insight that I discovered through internal & external research (interviews, workshops, and trends), which led to a new IBM designer role.

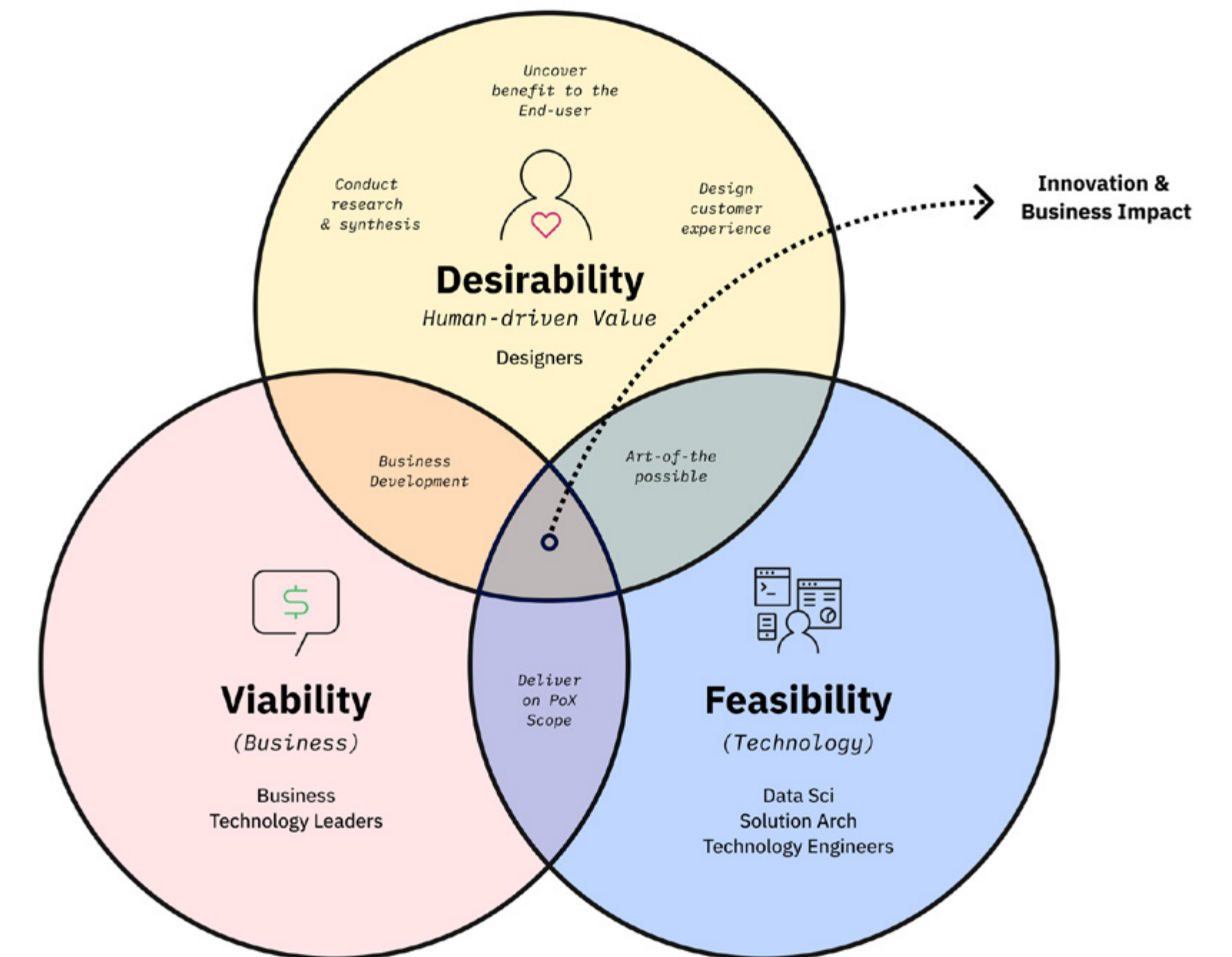
Target Audience

- CE GLOBAL SALES (1600+ PEOPLE)
- EXECUTIVE LEADERSHIP
- 1/2/3RD-LINE MANAGERS
- IBM DESIGN ORG

Key Stakeholders

- **Jonathan Steinberg, Design Practice Lead, Americas**
- Norbert Riedelsheimer, Design Practice Lead, WW
- Leon Gouletsas, Design Practice Lead, APAC
- Mica Whitby, Design Practice Lead, EMEA

The Three Lens of Impact that Drive Innovation (Transformation)



[Read Executive Overview](#)

CHALLENGE

'THE PROFILE OF DESIGNERS IN IBM CLIENT ENGINEERING IS TOO BROADLY DEFINED AND INCONSISTENTLY ADOPTED'

01. Inconsistent Execution

The designer role in CE is inconsistently executed in different geographies and markets.

02. Variety of Expectations

Managers in Client Engineering don't clearly know what they can expect from designers

03. Misconceptions Cause Friction

Some managers see us as facilitators (design thinking is a workshop). Some see us as visual designers (can you make this look "sexy"?)

04. Skills Assessment

Designers use the lack of clarity to interpret the role in a way that fits their personal skills and interests. We can not clearly assess skills for our existing designers

05. Hiring Too Broadly for the Role We Need

We are hiring designers with a different skillset for the mission

06. Designer Career

We cannot give our best career assessment and path. Attrition risk might grow

To set the foundation for the work that will be presented, we ran internal research sessions with the Client Engineering community to create a multi-perspective approach and recommendation.

Internal Interviews & Round Tables

10+

Multi-disciplinary discussions to establish an understanding of roles, current as-is, and desired to-be.

Participant Roles

5

Research participants roles that participated include Squad Managers, Designers, ATLS, Data Scientists, and BTLs.

Active Participants

75+

Members of the Client Engineering community were involved in the research and discussions.

Identified Personas

9+

Persona types were identified and categorized to help prioritize the message and continued approach.

OBJECTIVES

01.

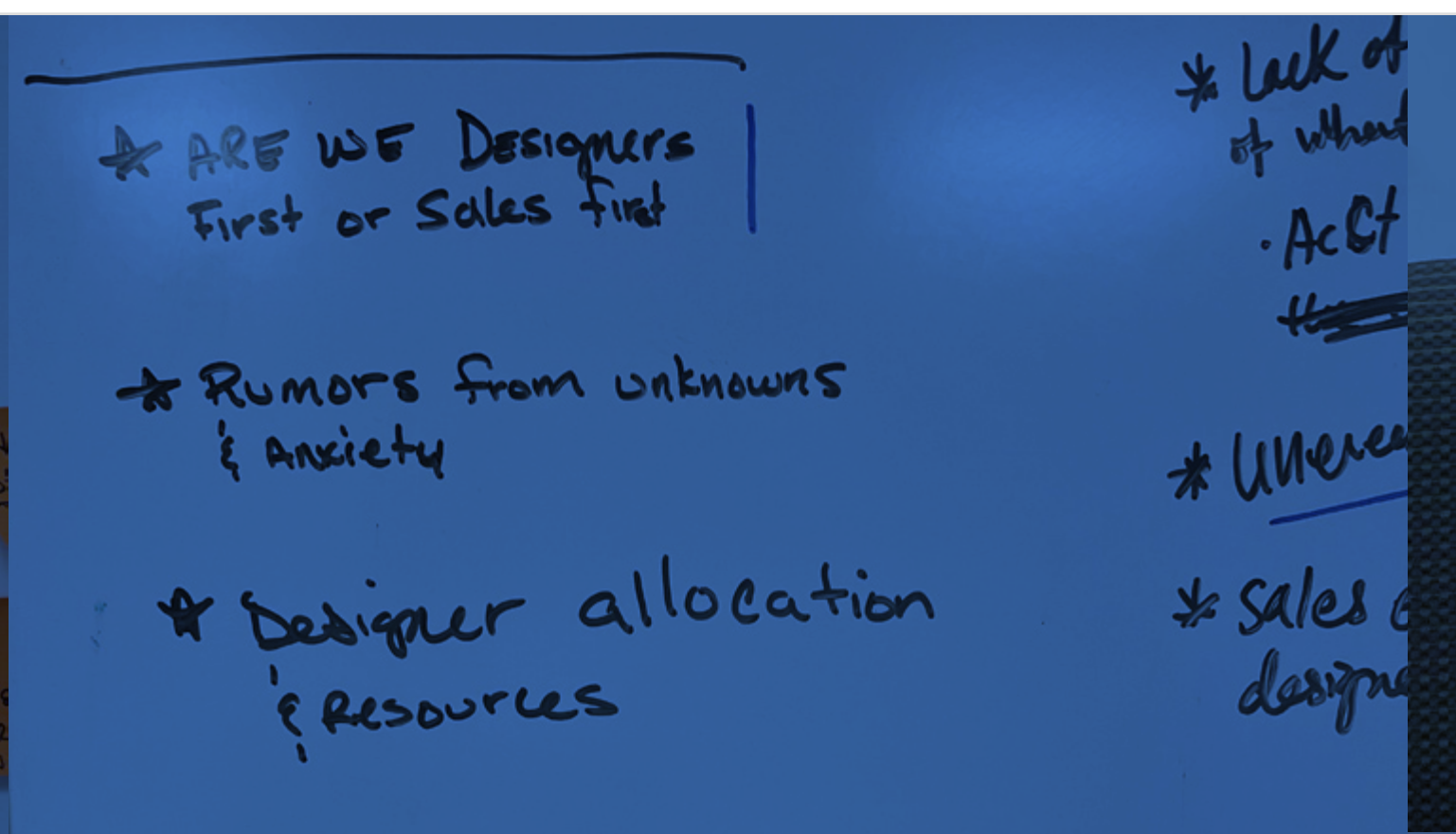
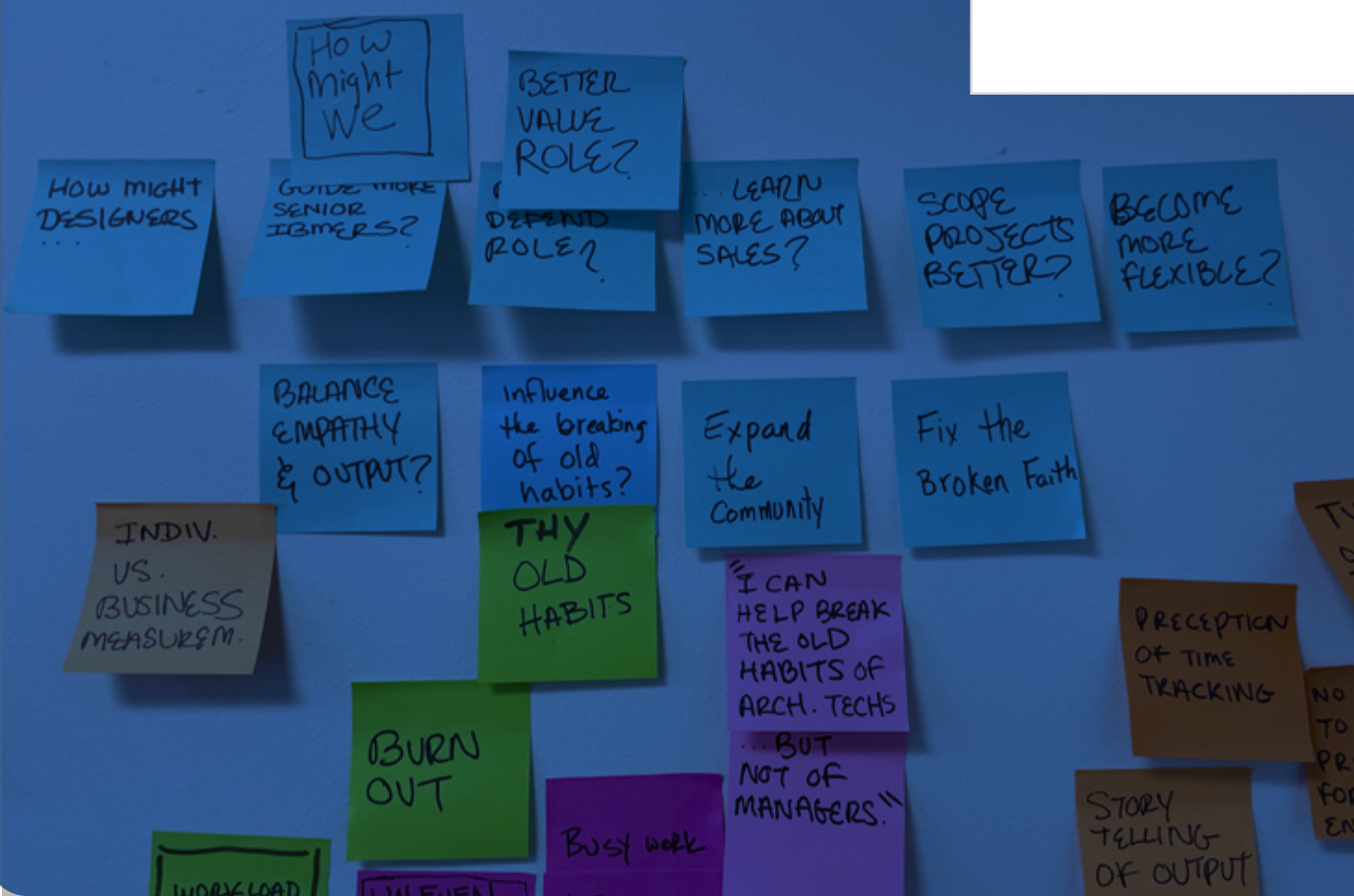
Understand the current state of the design role and its perception within the squad and overall Client Engineering.

02.

Explore how designers fit within CE, their squads, and Account Teams to enhance experiences & outcomes for customers

03.

Uncover where there is a gap in value for CE designers and value to the organization..



Designers



Understanding the current state of design in CE

This discovery session will help us understand the organization landscape and where design currently sits. We would like to explore what would make an ideal environment and how can we improve by reflecting on where design is now, what you like, wonder, and wish.

FOCUS
Designers in Client Engineering

As-Is
What is the current role of a designer?

TIP
Think about what you are doing day-to-day and weekly. What are you putting hours to?

To-Be
What do you envision the role to be?

TIP
What could the role of the designer be?

I wish...
What keeps you up at night? What could be improved?

TIP
Don't blame, focus on what can be improved.

I like...
What is going well?

TIP
Think about the way you worked, the communication between teams, etc.

I wonder...
What do you need to be successful?

TIP
Brainstorm new ideas! Any suggestions can be taken into account here.

Facilitation
Facilitator, Inspiration, Account Planning, Strategy, Innovator, Problem Solver, Prototyping, Human-centered, Mural, PPT / Presentations, Active Listening, Creative, Aesthetics, Selling, Design Thinking/EDT, Visual/Graphic Design, Framing, Empathy, Note Taking, Research, Engagement Lead

Project Management
Project manager, Internal resource engagement, Leading Engagements, Slack thread creator, Primary stakeholder interface

Design as a strategic partner
Strategic partner, Advocate for the return, Provide feedback to the Product Teams

User focused Research
User research on the business model, Advocate for the return, Provide feedback to the Product Teams

Best Practices
Working level agreements and cadence, User focused product thinking

concern over
concern over viability of investment in CE, concerned messaging does not align with behaviour, concerned hard to measure design impact using ISC

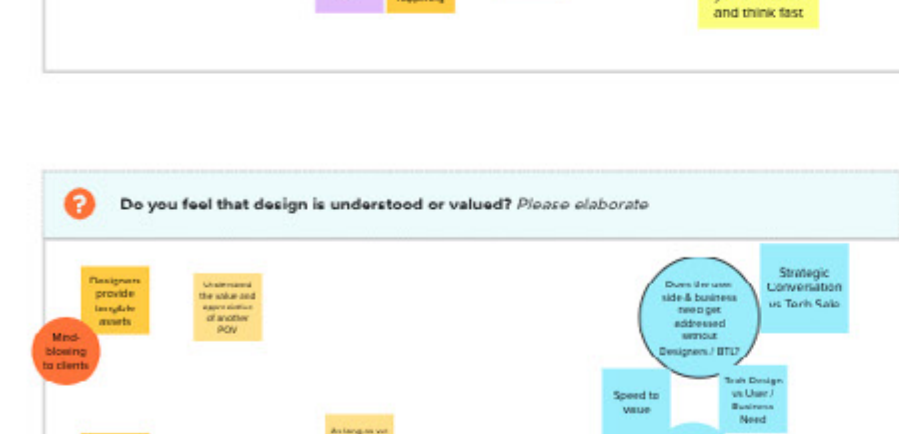
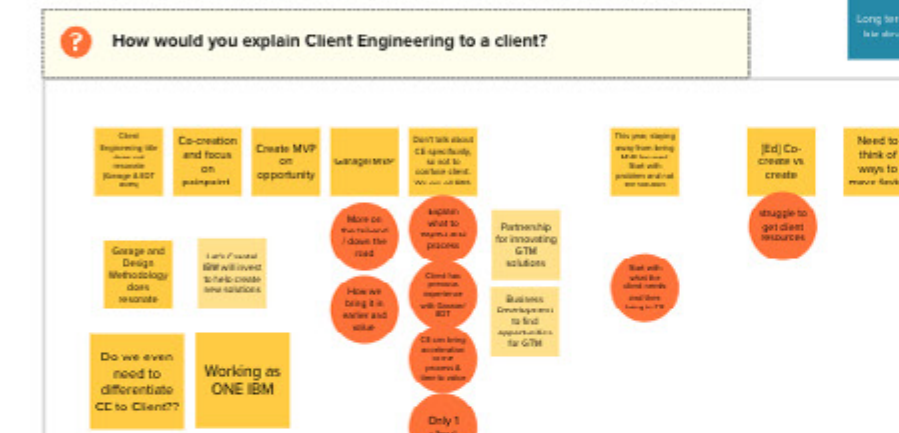
concern designers among
concern designers among those who are driving shared understanding through co-creation of shared work products

interesting work
interesting work, team collaboration, learning moments

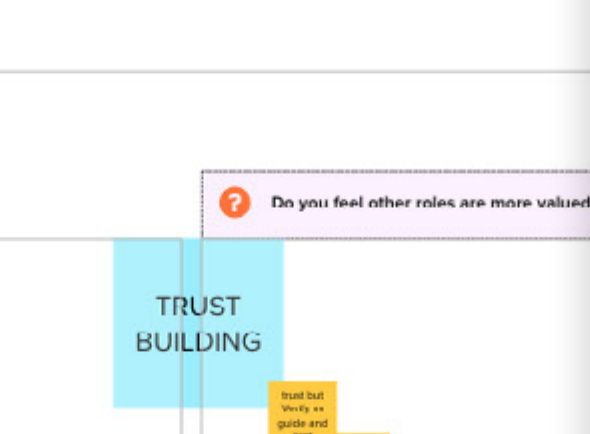
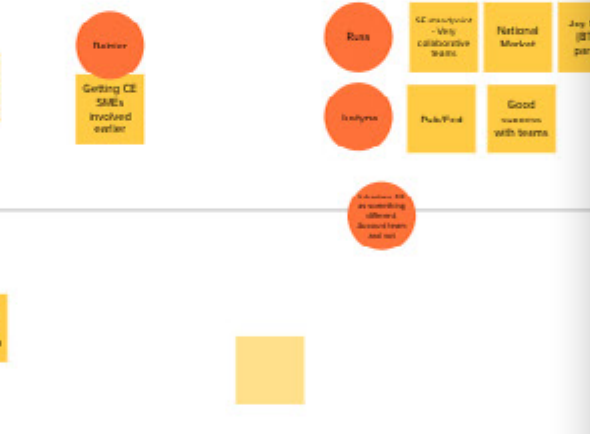
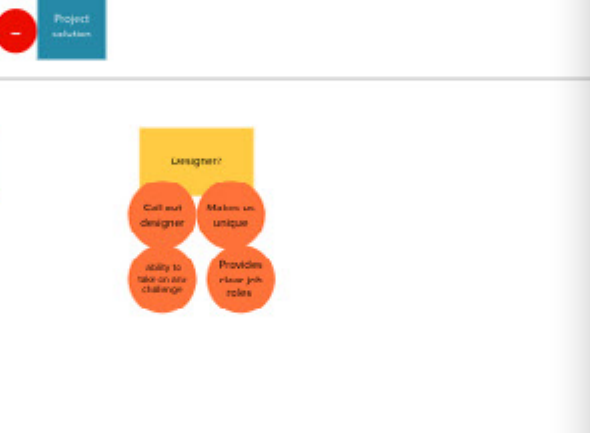
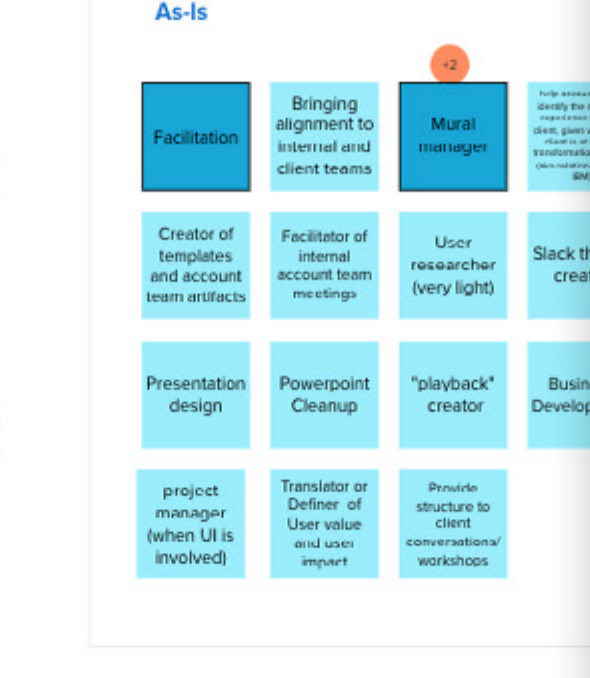
CE org recognizing need for
CE org recognizing need for deeper integration of design

designers fit into sales
designers fit into sales, designer leadership, define role of designer, SCOP solution

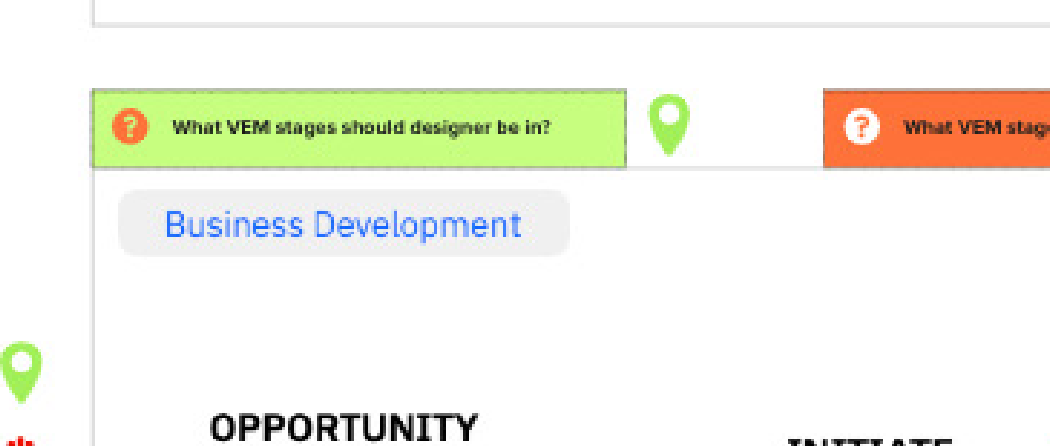
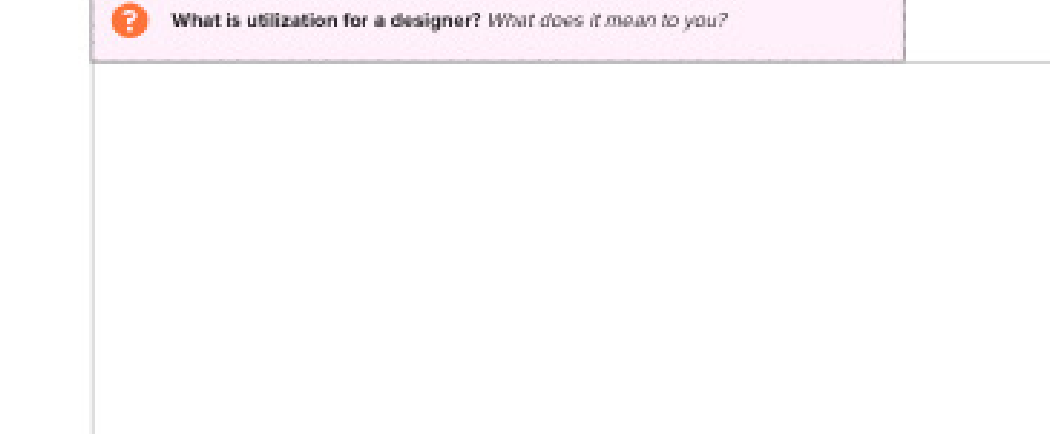
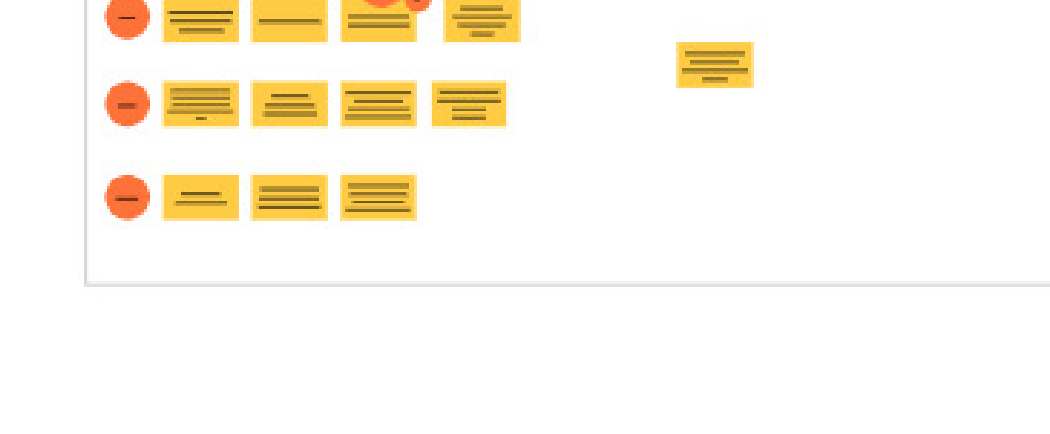
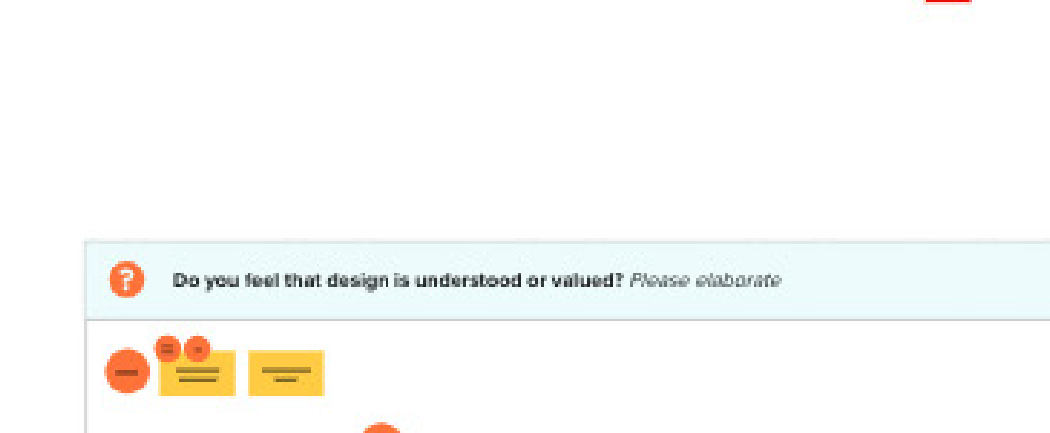
ATLs



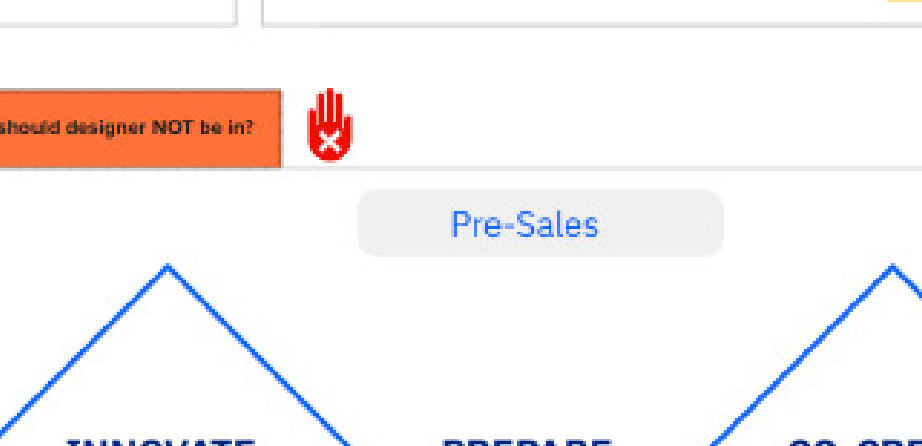
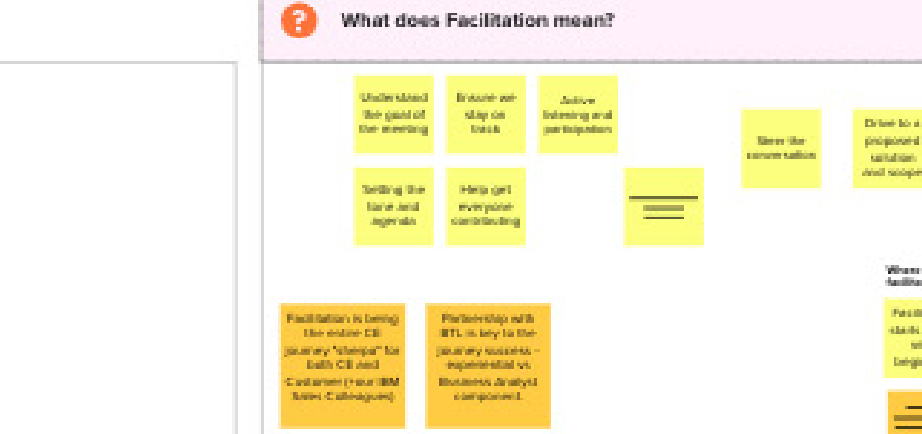
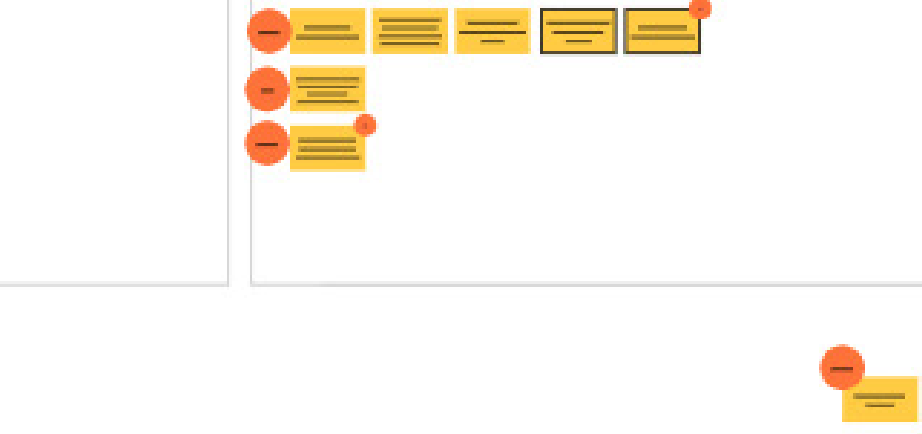
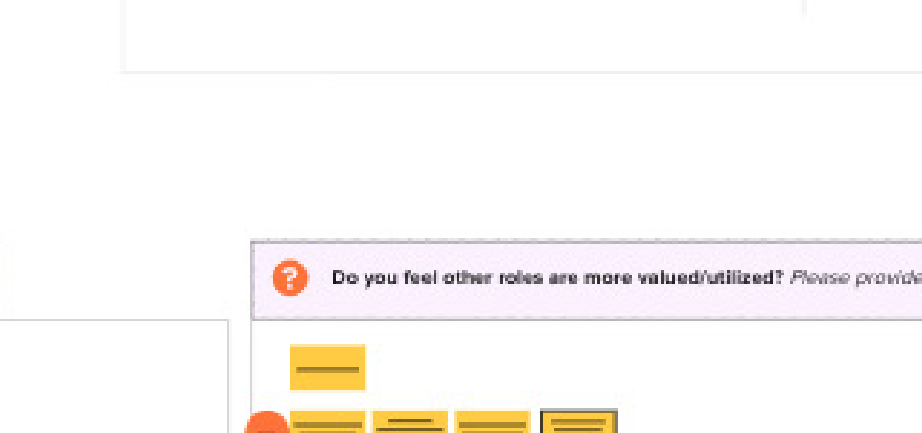
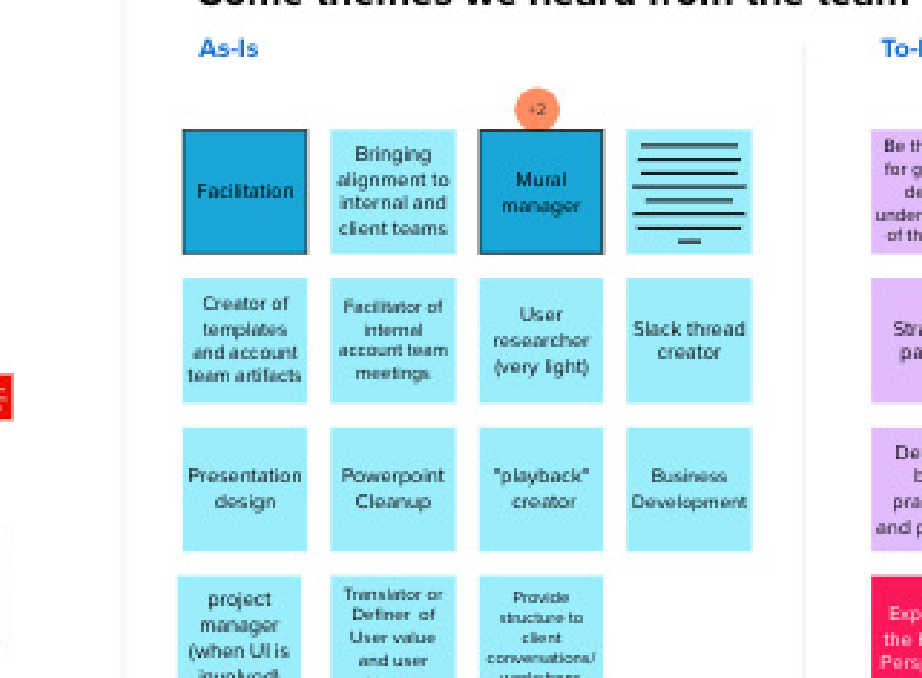
Managers



Managers



Managers

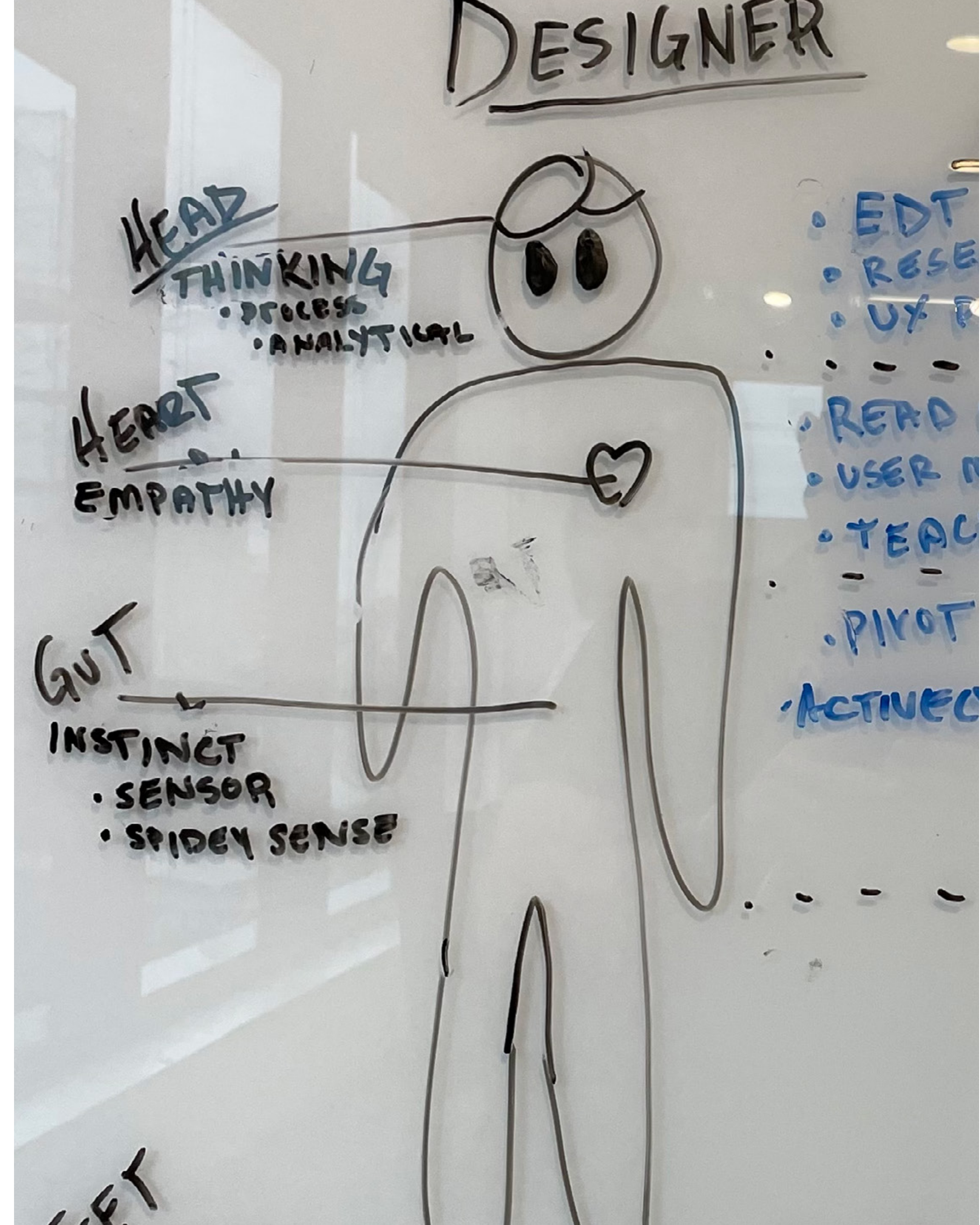




CASE STUDY // DESIGNER DEFINITION

DEFINE YOURSELF BEFORE SOMEONE ELSE DOES.

Design in a sales environment is an emerging trend that is not well defined or understood. There are many misconceptions and overall challenges that we needed to overcome. By defining our vision for the designer in Client Engineering, we control the narrative and how to show value.



Business	client engagement method				IBM technology	Internal partners	external partners	Value Engineering Method					Enterprise Design Thinking						
	plan	progress	deliver	IS/financial force				roles	pattern: sales plays	pattern: technical decision points (TDP)	peers	partners	client engineering overview	client engineering roles	value engineering method phases	proof of experience (PoX)	pattern: technology accelerators	edf principles	the loop
business framing	know your client	prospect with impact	implement and deliver value	account details	account technical leaders (ATL)	data fabric	open hybrid cloud platform	IBM consulting	external partners	why ca?	market leader	opportunity generation	proof of value (PoV)	AI governance	focus on user outcomes	observe	hits	AI essentials	new stories
value proposition design	plan strategically	pursue based on value	nurture and grow	planning assets	account and brand sellers	customer care	data fabric	IBM research		ce offerings	squad manager	stage: initiate	custom demo	customer care	diverse empowered teams	reflect	playbacks	as-is scenarios	prep protot
business case development		complete strategically		resource planning	customer success managers (CSM)	alops	business automation			ce value prop	innovation lead	stage: innovate	workshop	Hybrid Data Governance	restless reinvention	make	sponsor users	assumptions and questions	Exec playb
roadmapping		handle objections		reporting	expert labs	business automation	observability			ce approach	business technology leader	stage: prepare	architecture	Process Mining				big idea vignettes	priority gn
		communicate to influence		time entry		zero trust	security				solution architect	stage: co-create	minimum viable product (MVP)	Hybrid Cloud Integration				cognitive walkthrough	renew pla
		execute stakeholder strategy				data resilience	IBMZ				data scientist	stage: transition		AIOps				contextual inquiry	retrape
		design led co-creation				red hat ansible & openshift	regulated cloud workloads				technology developer			Asset Management & Insights				daily syncs	specul desi star
		negotiate to win					sustainability				designer			Modernize Business Critical Apps				empathy maps	stakeh ma
													Hybrid Cloud Storage					experience based roadmap	storytln
													Application Modernization					feedback and	to-i scen
													Data Security					hits	user st

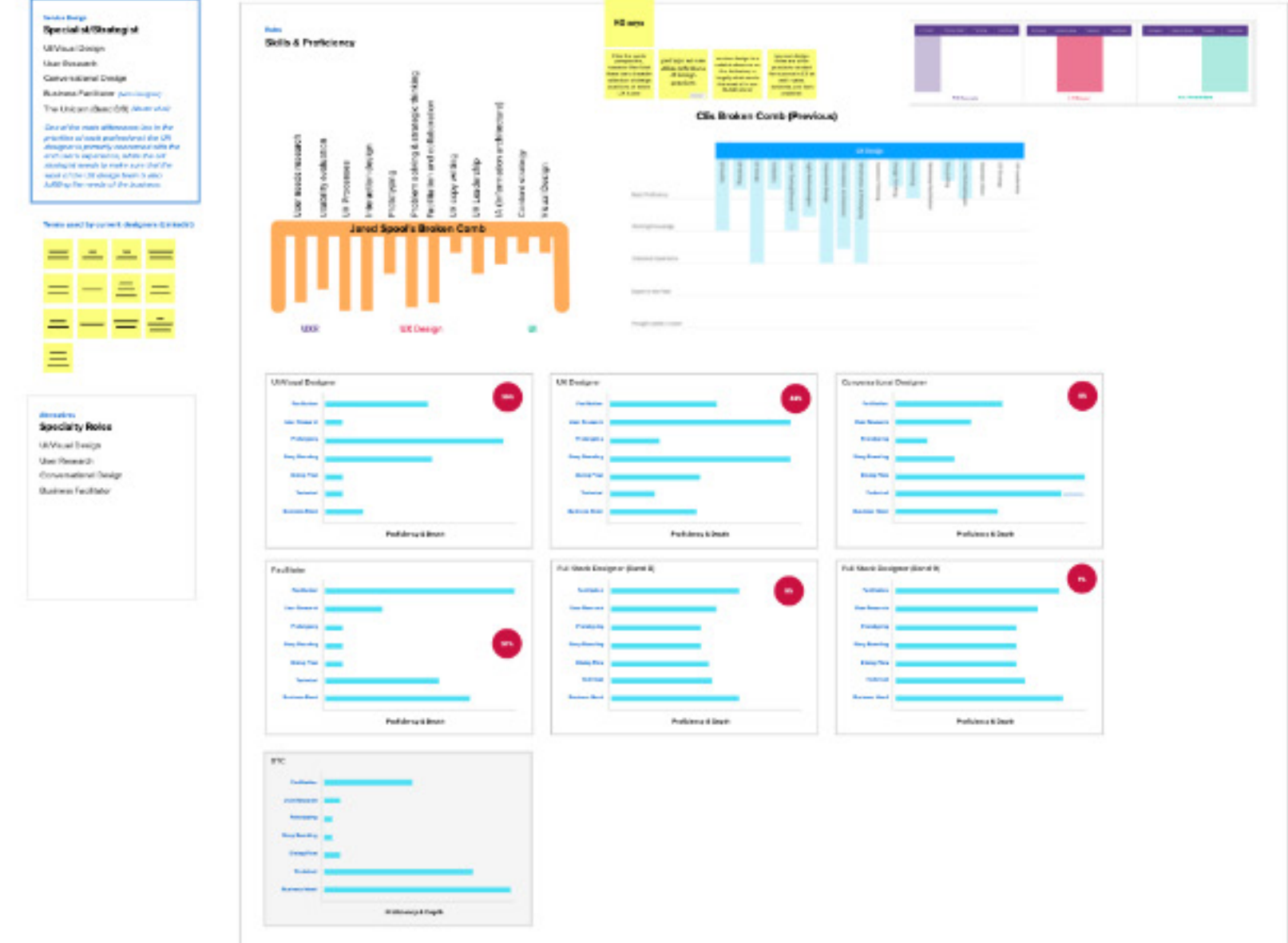
2

Design & BTC Role Responsibilities [WIP]



4

Breadth & Depth of Design



Different from IX
Same as IX
we don't do that yet or not good enough

We are
...bring cutting edge technology into use
Faster and bring innovation to our clients and their users

BTCs are currently being talked about

Business Transformation Consultant - BTC specific contributions Overview

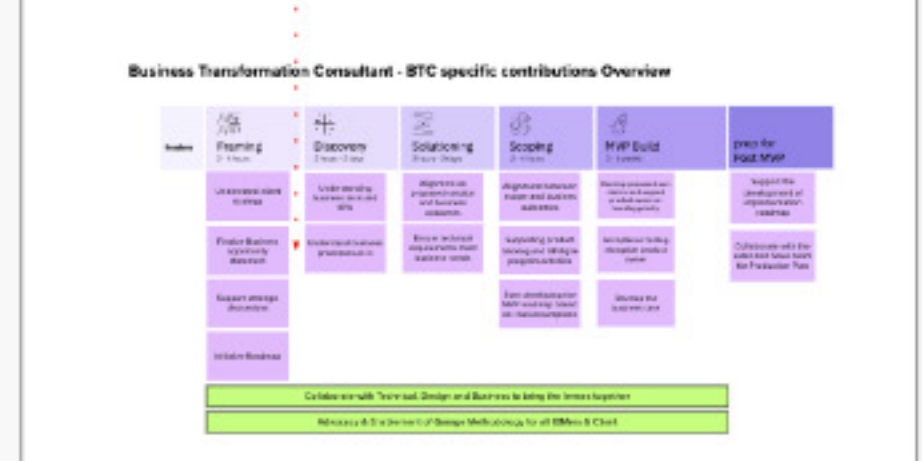
Business Design: business case development, viability and feasibility analysis and design

designing and applying additional techniques to prove value to clients

prepare to prove the value of our technologies in context of our clients problems

prime our technologies, value propositions in context of our clients challenges

Intro to BTC role for Canada office hour 2021



We do

- leading and guiding others**: Leading Drivers through the design process, whether it be for colleagues or clients
- Session Design, Client conversations**: Process Design and Facilitation: design and deliver innovation resources for our clients
- own and manage the design for client sessions and position of experience with our technologies**: Coordinate design sprints, customer co-creation and user feedback sessions
- designing client and internal session plans**: Collaborate with internal teams to design business opportunities and design effective innovation experiences and client sessions
- Design and create tools for client sessions**: solve real-world problems.

Get our clients started.

- Align**: Aligning teams on complex ideas to allow for faster delivery
- Advocate**: Advocate for design and the human experience that addresses pain points and serves the greater business need
- Prototypes, mockups and custom demos**: Visual Design: design, illustration, information graphics
- Storytelling**: Writing and Storytelling: written, spoken, audio-visual
- Enable and coach**: Monitor and educate internal and external stakeholders on the value, methods, and impact of design
- Develop new methods of**: Design User Experiences that are delightful and engaging

as well as compelling prototypes.

bring our products value to live by custom design solutions

Role Area	Responsibilities
Business Analyst	Analyze client's business goals and needs, identify opportunities for innovation, and define the business case for the project.
UX Designer	Conduct user research, create user personas, and design user-centered solutions that address client needs.
Solution Architect	Design and implement scalable, secure, and reliable solutions that meet client requirements and business goals.
Business Facilitator	Facilitate client sessions, manage stakeholder expectations, and ensure the project stays on track.

Skills Profile

Business Analyst, UX Designer, Solution Architect, Business Facilitator

Current Capabilities Matrix

Business Analyst, UX Designer, Solution Architect, Business Facilitator

Role Area	Responsibilities
Business Analyst	Analyze client's business goals and needs, identify opportunities for innovation, and define the business case for the project.
UX Designer	Conduct user research, create user personas, and design user-centered solutions that address client needs.
Solution Architect	Design and implement scalable, secure, and reliable solutions that meet client requirements and business goals.
Business Facilitator	Facilitate client sessions, manage stakeholder expectations, and ensure the project stays on track.

Role Area	Responsibilities
Business Analyst	Analyze client's business goals and needs, identify opportunities for innovation, and define the business case for the project.
UX Designer	Conduct user research, create user personas, and design user-centered solutions that address client needs.
Solution Architect	Design and implement scalable, secure, and reliable solutions that meet client requirements and business goals.
Business Facilitator	Facilitate client sessions, manage stakeholder expectations, and ensure the project stays on track.

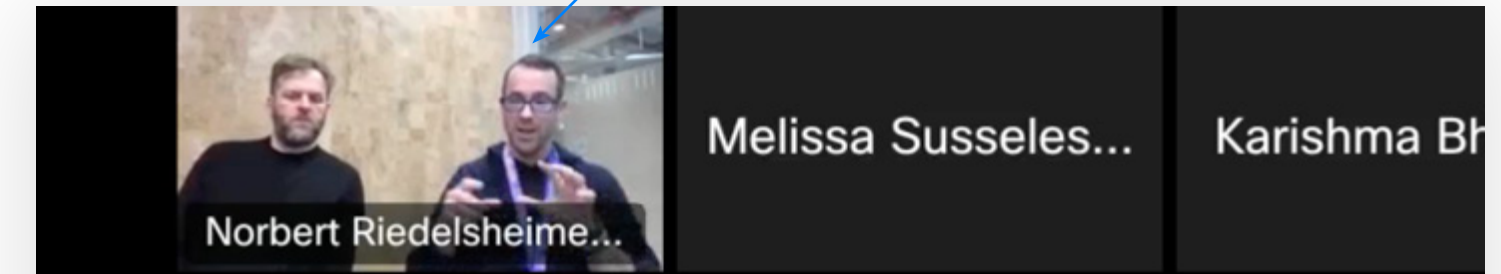


CASE STUDY // DESIGNER DEFINITION

WE ARE INNOVATION DESIGNERS

Innovation Designers in IBM Client Engineering are thought leaders in human-centered design. They apply collaborative design, lean user research, and lean UX best practices to bridge the gap between human needs and cutting edge technology towards value — **transitioning our clients from where they are now, to where they need to be tomorrow.**

Yep, it's me again



CE Innovation Design Practice

Innovation Designers in IBM Client Engineering are thought leaders in human-centered design. They apply collaborative design, lean user research, and lean UX best practices to bridge the gap between human needs and cutting edge technology towards value — transitioning our clients from where they are now, to where they need to be tomorrow.

We believe that there is a human at the beginning of every problem and at the end of every solution.

[Watch The Innovation Designer Announcement \(WW Managers\)](#)

Innovation Design is a discipline ...

Collaborative design

- ↳ **Lead our clients and colleagues through the innovation process, advocating for a human-centered approach** as we believe that there is a human at the beginning of every problem, and at the end of every solution.
- ↳ **Design & deliver effective and collaborative innovation sessions.** We bring together diverse perspectives to discover needs, **inspire for value** and **accelerate alignment** on the most valuable solution to prove for our clients.
- ↳ **Advance the discipline of innovation design**, with **new methods to accelerate time to value** in the problem spaces that our cutting edge technologies are addressing. E.g. Data and AI Design, Ethical Design, Sustainability Design, Platform Design, System Design, Event Driven Design, Conversational Design ...

Lean Research

- ↳ **Plan & conduct lean user research to understand client and user needs, wants and limitations.** Synthesize findings and insights to **uncover and elevate opportunities** for the valuable application of our technologies within the client.
- ↳ **Identify use case patterns** across clients, industries and markets, and share and utilize them proactively to **distribute innovation** to other clients; apply lateral **thinking beyond siloes.** (Cross-sell)

Lean UX

- ↳ **Translate our clients needs into inspiring and compelling solutions**, using **rapid prototyping** to **craft experiences** that connect people in meaningful ways with IBM Technology. We **collaborate with engineers** to bring our Technology's value to life.
- ↳ **Create collective understanding and generate buy-in** for the value and purpose of the created solution through **storytelling.** We inspire the audience and **illustrate a better future** for our clients in a way that resonates with decision makers, stakeholders and end users; **leading to adoption** of our innovations.

Optimizing the impact of CE Innovation Designers

To drive the optimal client experience and subsequent business results, we need to leverage the unique skill of designers and avoid a fixed mindset that designers are just:

‘Traditional UI or UX’ - We have different set of outcome goals and are not creating new products or visually-focused designs.

Fixing Powerpoint (*‘make things pretty.’*)- Not all designers are visual and have the skillset to visually enhance a deck.

Note Takers - Designers are strategic listeners and do more than take notes.

Design Thinking Theater - We don’t just stand up in front of the room and facilitate workshops.

Specializing in one product - We are Human SMEs with a minor in technology.

Troubled client engagement fixers - Just because we’re problem solvers, doesn’t mean we can fix the coffee maker.

Benchwarmer - Designers bring a unique perspective as team players, and should have valuable playing time per engagement.

Being tool focused - We have many tools in our belt and can approach problems in many different ways; aka not just Mural.

Task Managers - Unless acting as engagement or project leader, designers can contribute to the larger plan and strategy.

Next Steps & Key Outcomes

Key Outcomes

Define Profession: Socialized and support from top-down & bottom up

Career Development: Career development guidance (done in conjunction with IBM Design community), so designers know they have a path

On-Boarding & Skill Development: Opportunities to up-skill and train designers; bootcamps, pairing opportunities, industry alignment, IBM Design Community alignment

Communication and Consistency: Establish routines, traditions, and processes that nurture a culture of innovation, collaboration, and positive intent

Next Steps

Alignment of 3-Pillars: WW foundation of priorities for Q1/2: **Role Definition, Activation, Community**

Celebrate & Show: Celebrate the wins and highlight individuals/roles through a public forum. Share resources, assets, and learning for others to follow

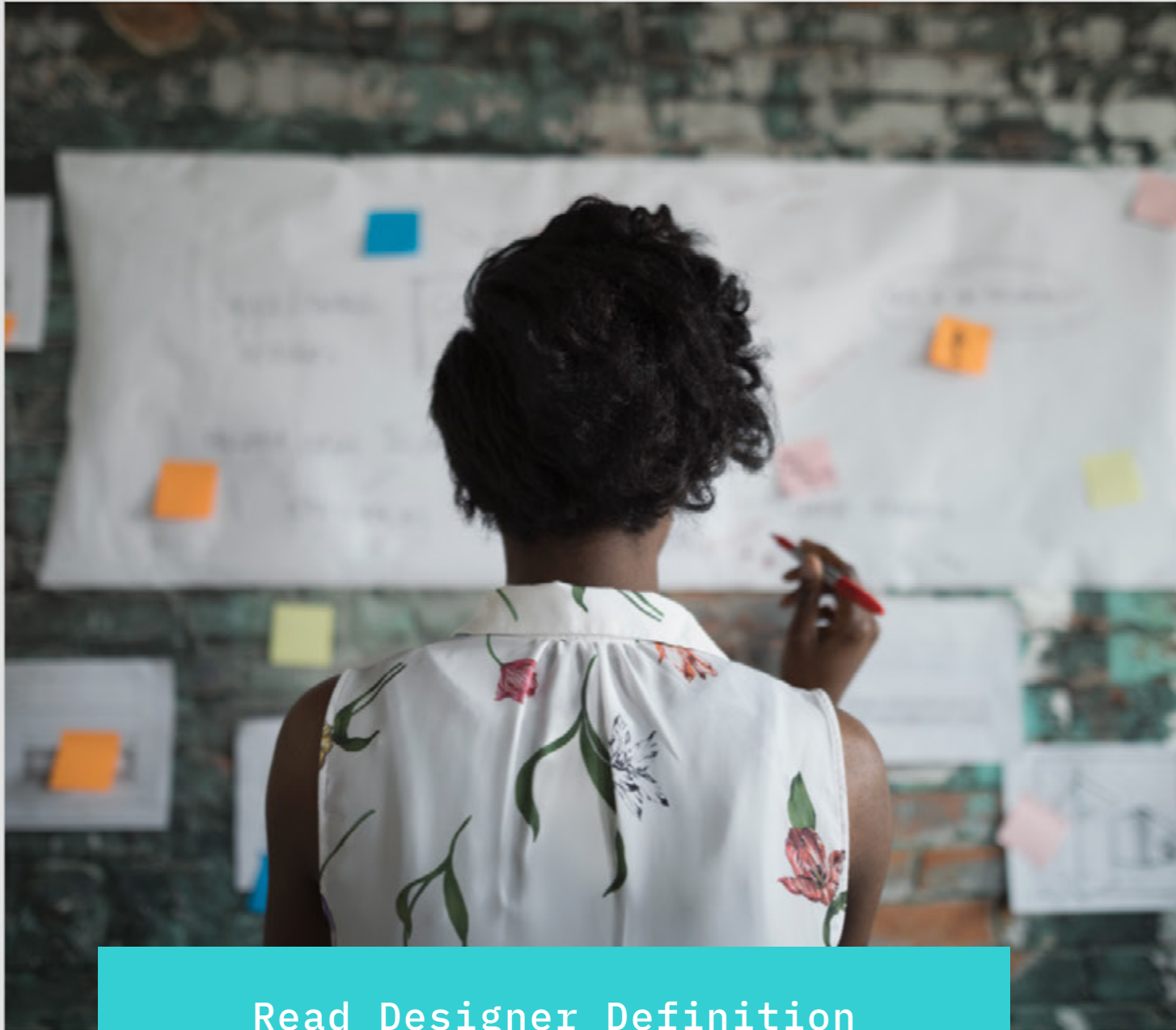
VEM Roles & Responsibilities (3-in-a-box): Specifics of the role in each stage of the methodology to ensure managers know how to leverage and guide the rest of the team

Skills Survey: Identify skills baseline for current team and align on education & training to enable team for new role standards

Innovation Designer Rollout

Book 1:
Designer Definition

Current



[Read Designer Definition](#)

[WW Release \(NEW\)](#)

Book 2:
Designer Playbook

Started



[Playbook \(WIP\)](#)

[Community of Practice Role](#)

Book 3:
Designer Career Path

Started



[Read Career Overview](#)



- USE CASE -

MAKING DIGITAL
BANKING **GREAT** AGAIN



Opportunity

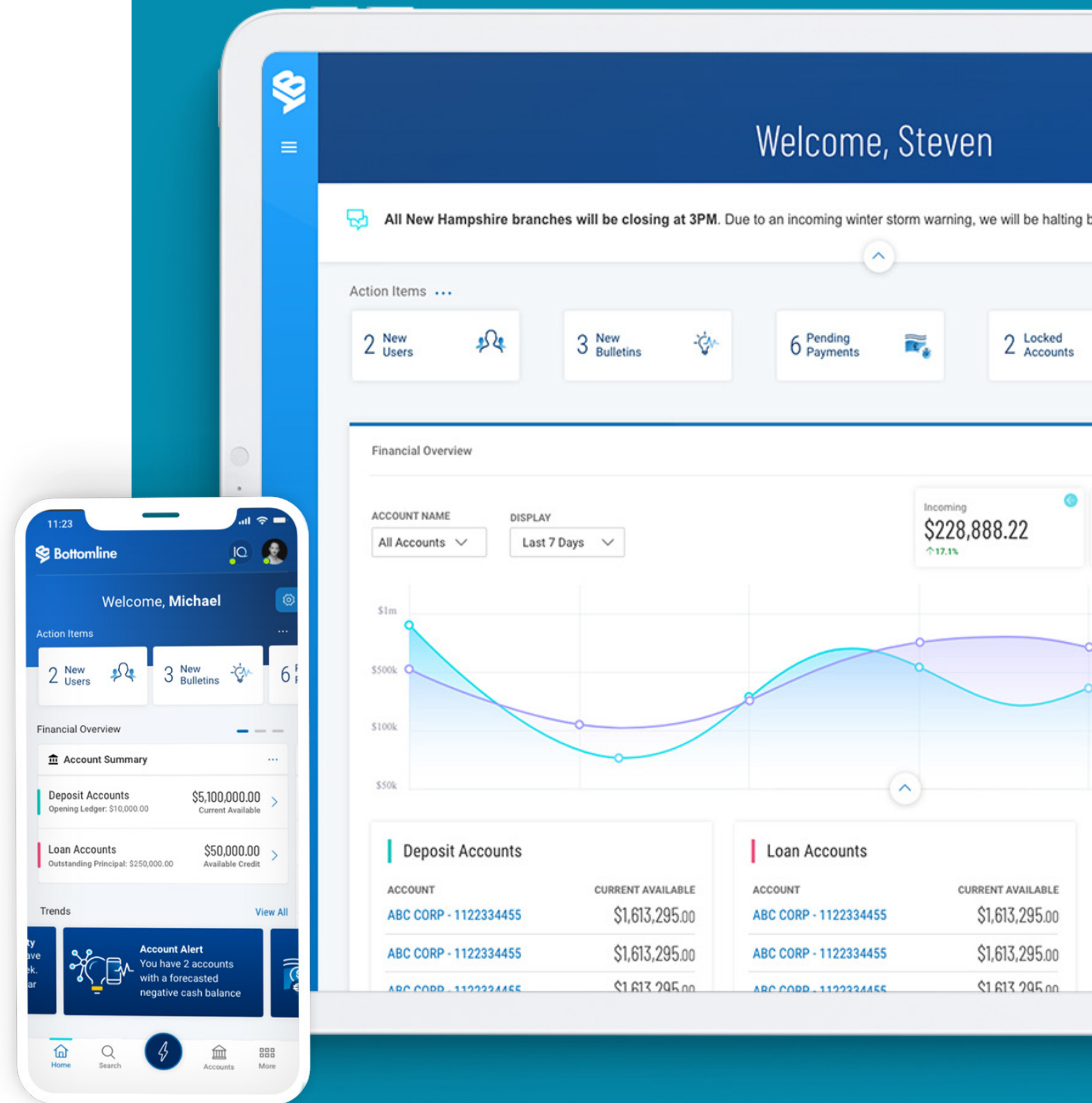
EXPAND FUNCTIONALITY & ACCESSIBILITY FOR THE USER

As a leading banking platform provider for over 30 years, Bottomline has worked with bank partners, from large to small, to create a consistent customer experience that was optimized for the technology of the time.

Challenges

Oh there are challenges and here are a few that come to top of mind:

- OUT-DATED TECHNOLOGY
- WHITE-LABELED/THEMEABLE
- NO NAVIGATION ARCHITECTURE
- CLIENT EXPECTATIONS
- OUT-DATED USER INTERFACE
- MERGING PLATFORMS
- TIMELINE
- NEW TEAM
- ACCESSIBILITY
- MANY MORE...





Home



Dashboard

Portlet Message

No Service Message setup for Bank Administrator Role. This message banks. This message is for all the lead banks. This message is for all the This message is for all the lead banks. v This message is for all the lead message is for all the lead banks. This message is for all the lead bank message is for all the lead banks. This message is for all the lead bank message is for all the lead banks. This message is for all the lead bank

Message Type: Message of Day - Permission-Driven

B *I* U ~~S~~

Portlet message

Preview Area

Portlet message

Update Message

Home

- This is 300 characters. Pellentesque ornare s
- 1** Payments await your approval.
- 5** Rejected payment needs your review.
- 2** New users await your approval.
- 3** New Bulletins to read.

Financial Overview

Deposit Accounts

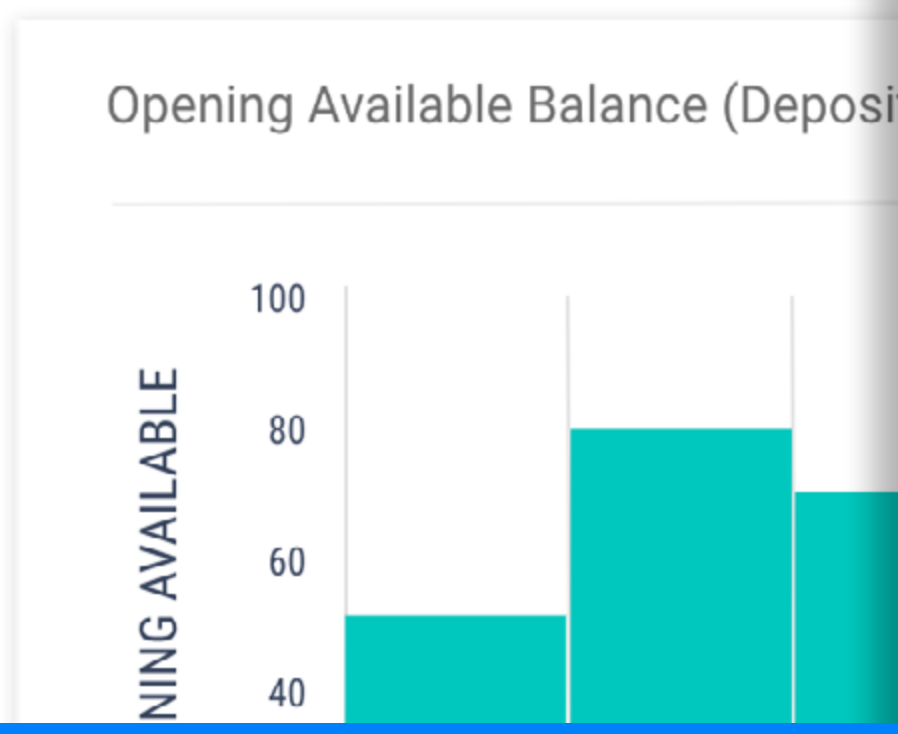
Filter Select

Account Name	Account
CL Account	1234567

MESSAGE OF THE DAY

e-Statement, Online Banking, On Monday, April 23, 2019 mini Online Banking, and Business O
[More](#)

SMART CHART



All New Hampshire branches will

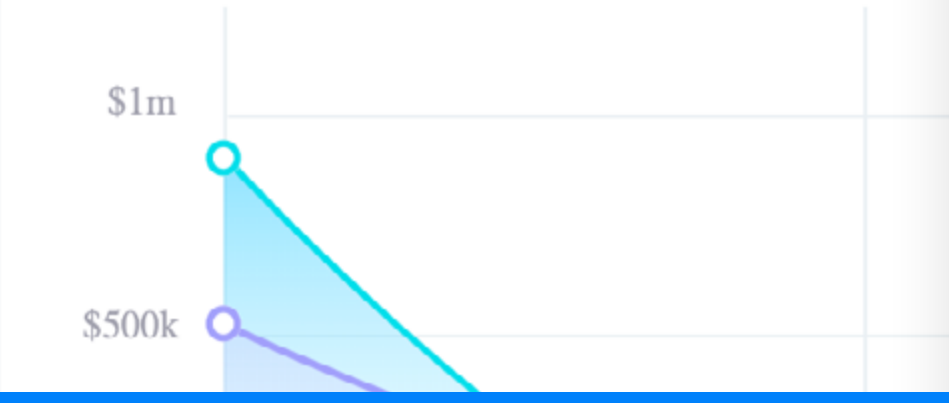
Action Items ...

2 New Users

3 M B

Financial Overview

ACCOUNT NAME: All Accounts DISPLAY: Last 7 Days



MAKING PROGRESS

30 YEAR OLD PRODUCT »

1ST ITERATION »
(Adopt style & functionality from Enterprise version)

ENTER JON

DESIGN THINKING SESSIONS

2ND ITERATION »
Refine layout and functionality to align with user personas & goals

END-USER INTERVIEWS

3RD ITERATION »
Future thinking and mobile integration. Incorporated user feedback and updated roadmap

CONTINUED REFINEMENT & INTERACTION

ottomline

ID

Remember IDs

SIGN IN

Forgot password?

Need help signing in?

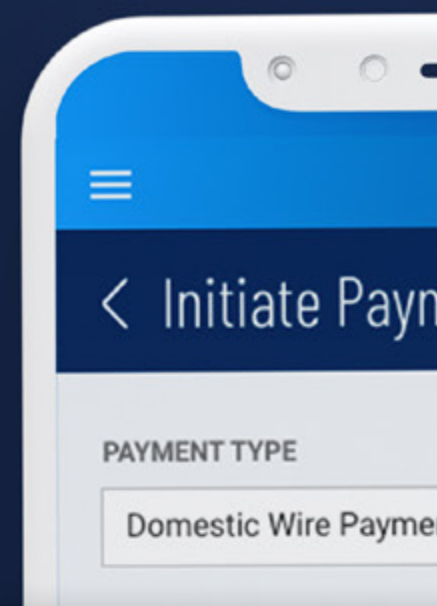
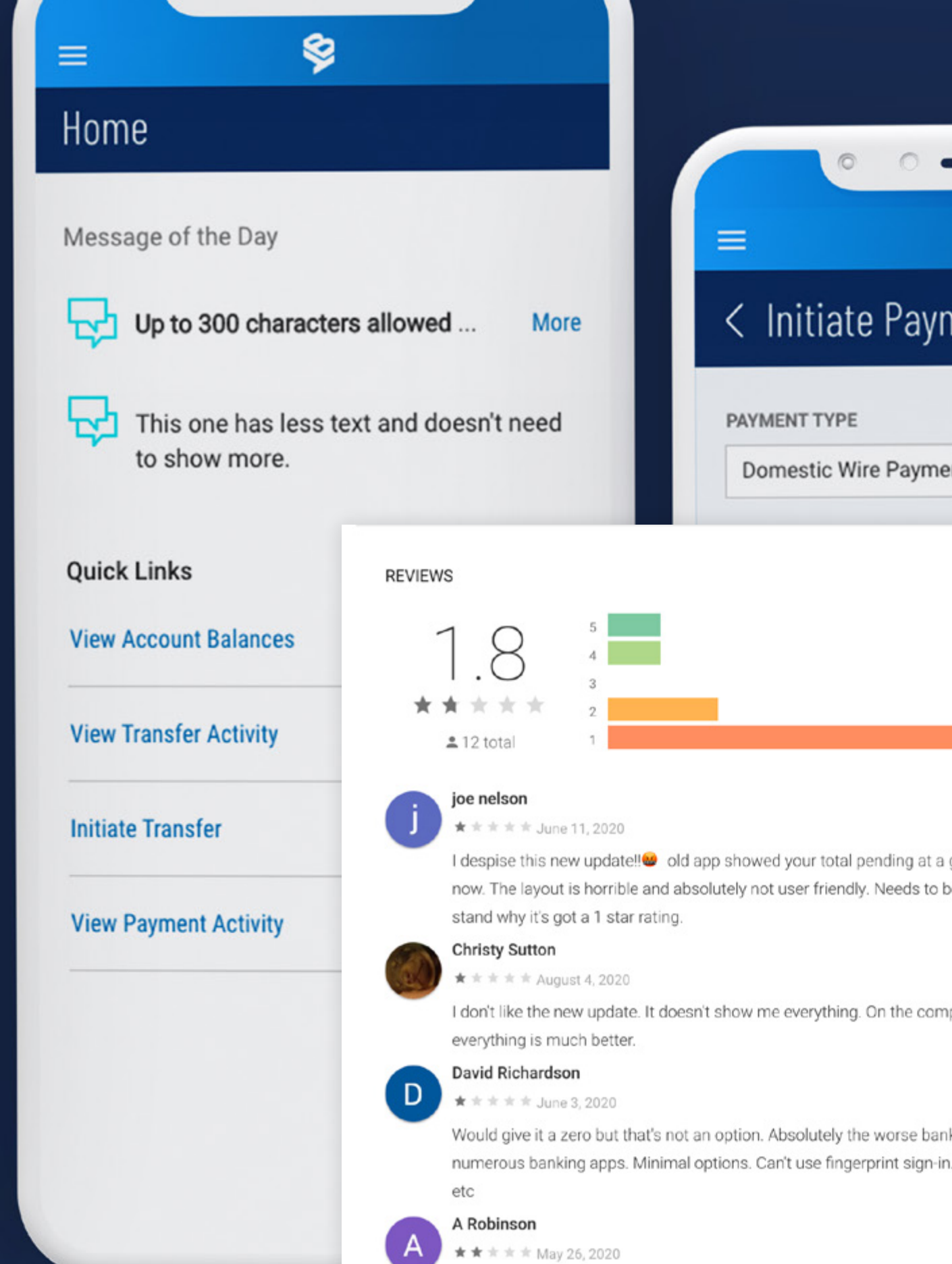
dolor sit amet, consectetur adipiscing elit, sed do eiusmod
 unt ut labore et dolore magna aliqua. ed pharetra ipsum est,
 n velit placerat eu. Aliquam vel sapien massa.

Transfer Activity

Transfer(s)

ION ▾

ACCOUNT	AMOUNT
Framping	\$120,745.33
Technologies	\$57,478.28
Builders, Inc	\$95,824.06



REVIEWS Review Policy

1.8

★ ★ ★ ★ ★

12 total

joe nelson ★ ★ ★ ★ ★ June 11, 2020

I despise this new update!! old app showed your total pending at a glance doesn't do that now. The layout is horrible and absolutely not user friendly. Needs to be fixed. I fully understand why it's got a 1 star rating.

Christy Sutton ★ ★ ★ ★ ★ August 4, 2020

I don't like the new update. It doesn't show me everything. On the computer logging in and everything is much better.

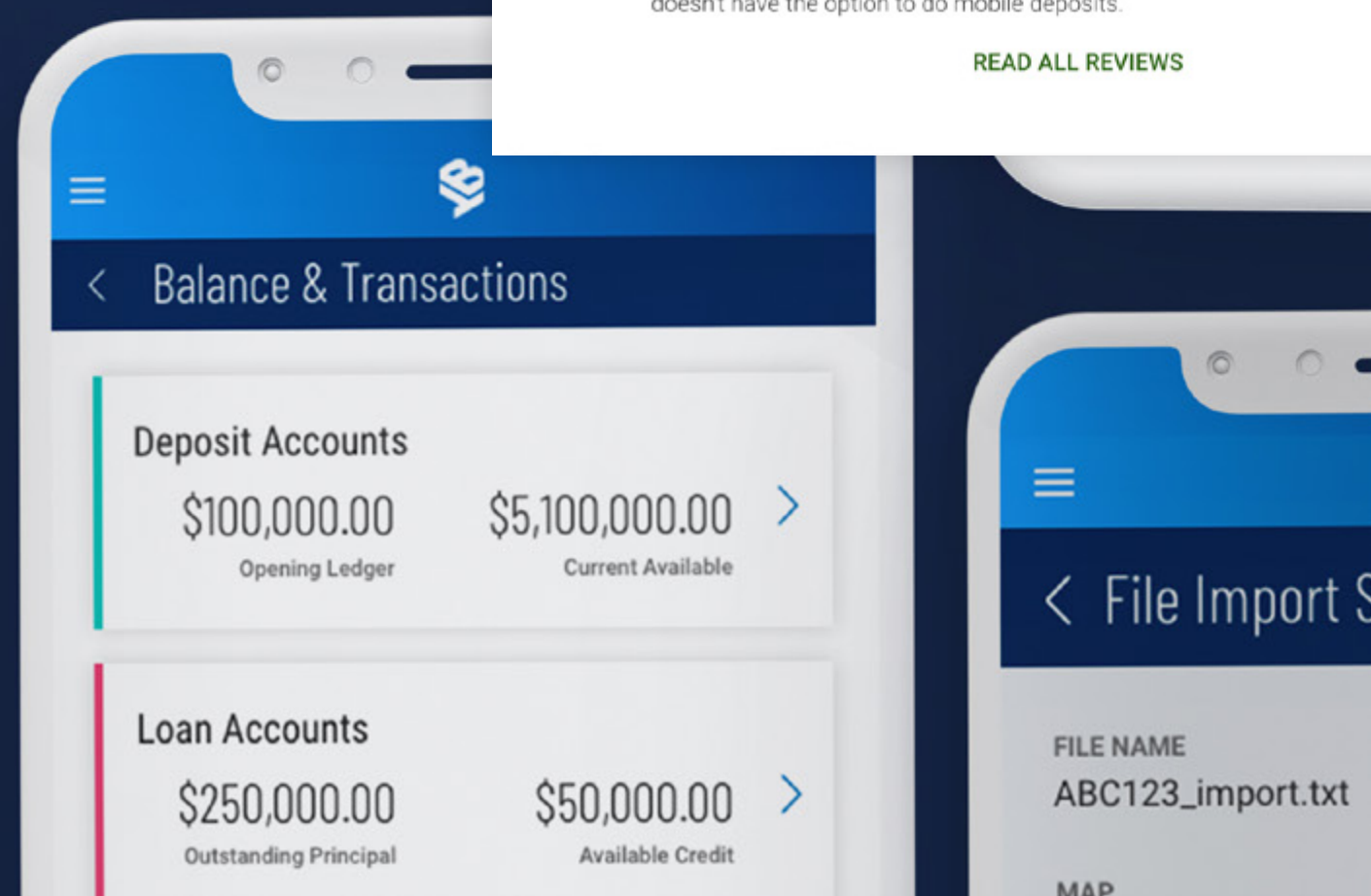
David Richardson ★ ★ ★ ★ ★ June 3, 2020

Would give it a zero but that's not an option. Absolutely the worse banking app and I use numerous banking apps. Minimal options. Can't use fingerprint sign-in. Can't deposit via app etc

A Robinson ★ ★ ★ ★ ★ May 26, 2020

Didn't like the original app but hate this one more. This was not a good update and it still doesn't have the option to do mobile deposits.

[READ ALL REVIEWS](#)



MAKING DIGITAL BANKING GREAT AGAIN

SOMETIMES
 THE MOST
IMPORTANT
 FEEDBACK
 IS NOT
 PLANNED.



MAKING DIGITAL BANKING GREAT AGAIN

The rude awakening

FORCED FUNCTIONALITY IS NO FUN AT ALL

With any project, there are situations when scope, timeline, and overall goal are combined with the proceeding challenges. When they are not properly addressed, you quickly see the foundational cracks start to form.

The people spoke up, I went back to my designer roadmap, and seized an opportunity to blaze a new trail.





DEFINING SUCCESS

SETTING THE STAGE

What are some milestones and goals that need to be achieved in order for this to be successful?

Where are there opportunities to share this effort with other areas of BT?

(NOTE: We ended up merging the experience for all bank platforms to simplify development, cut costs, and create One App to rule them all)

BOTTOMLINE TECHNOLOGIES NATIVE BANKING APP

Lean UX Canvas

Title: Native Mobile as a Platform

Business Problem

What business have you identified that needs help?

Engagement with multiple Bottomline solutions remains low. Users only login occasionally and miss the full potential of the value we provide.

Workflows that are time-dependent are often delayed because of the "pull" model of desktop applications. Users must intentionally visit the application to discover that there are work items waiting for their attention.

Solution ideas

List product, feature, or enhancement ideas that help your target audience achieve the benefits they're seeking.

Native mobile applications designed in a radically persona-driven way, and adaptable based on the role of the logged-in user.

Some applications would be focused on Bank executives. (Bottomline's direct customers). Others would be part of the solution set that Banks resell to their customers. (Corporate customers, small business, et-cetera).

Business Outcome

(Changes in customer behavior) What changes in customer behavior will your way that adds value to your customers?

Greater engagement on Bottomline's

Increased positive customer sentiment we provide.

Increased sales as a result of demonstrated customer testimonials.

Users & Customers

What types of users and customers should you focus on first?

Executives who want to know when new information is available, such as in the case of Predictive Intelligence. An action was taken...a new insight was generated.

Banking employees who are part of a workflow that needs to proceed. There are often monetary incentives for making these workflows faster - payment approvals, fraud events, et-cetera.



User Benefits

What are the goals your users are trying to get out of your solution? (e.g., do better at my

Being alerted to a new work item or decision about how to handle it.

Having the ability to handle it on-the-go to maximize my time and keep the busi

An app that works smoothly and is fun to use, easy to control and (honestly) cool.

Hypotheses

Combine the assumptions from 2, 3, 4 & 5 into the following template hypothesis statement:

"We believe that [business outcome] will be achieved if [user] attains [benefit] with [feature]."

Each hypothesis should focus on one feature.

We believe that executive users would appreciate timely updates to information or workflows that they have initiated without having to return to their desk.

We believe that customers will benefit from being able to tackle tasks away from their office and will increase workflow timeliness and cost savings as a result. (Approvals, fraud identification, employee access management, and so-on).

We believe that demonstrating a well-crafted native mobile solution will generate interest during the sales cycle and increase Bottomline's marketability.

What's the most important thing we need to learn first?

For each hypothesis, identify the riskiest assumption. This is the assumption that will cause the entire idea to fail if it's wrong.

Do Bank executives find timely updates in-their-pocket and the ability to take immediate action compelling?

Do participants in an end customer workflow like approvals want to handle those tasks as-they-appear rather than logging into the desktop application?


Does Bottomline sales believe that demonstrating this capability would help their sales efforts?

What's the least and most important thing we need to learn first?

Brainstorm the types of experiments you can run to test your assumption is true or false.

Discuss this possibility with a number of people (internal or external). Have this conversation with

If the conversations are positive, launch a mobile MVP for both Android and iOS. Run an internal TestFlight for sales effort



GETTING BACK TO **BASICS**

1.0 Observation

2.0 Ideation

3.0 Prototyping

4.0 User Feedback

5.0 Iteration

6.0 Implementation

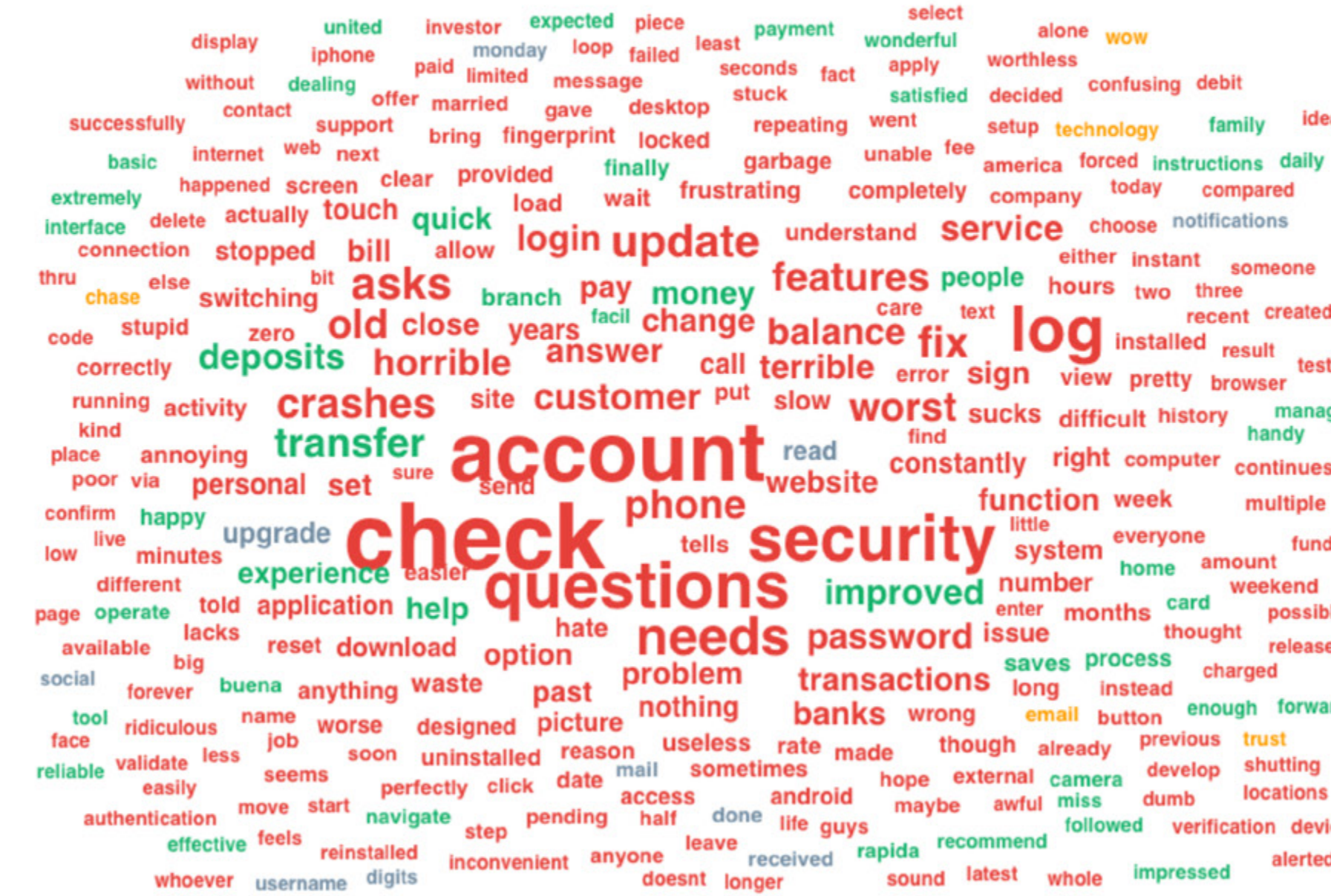
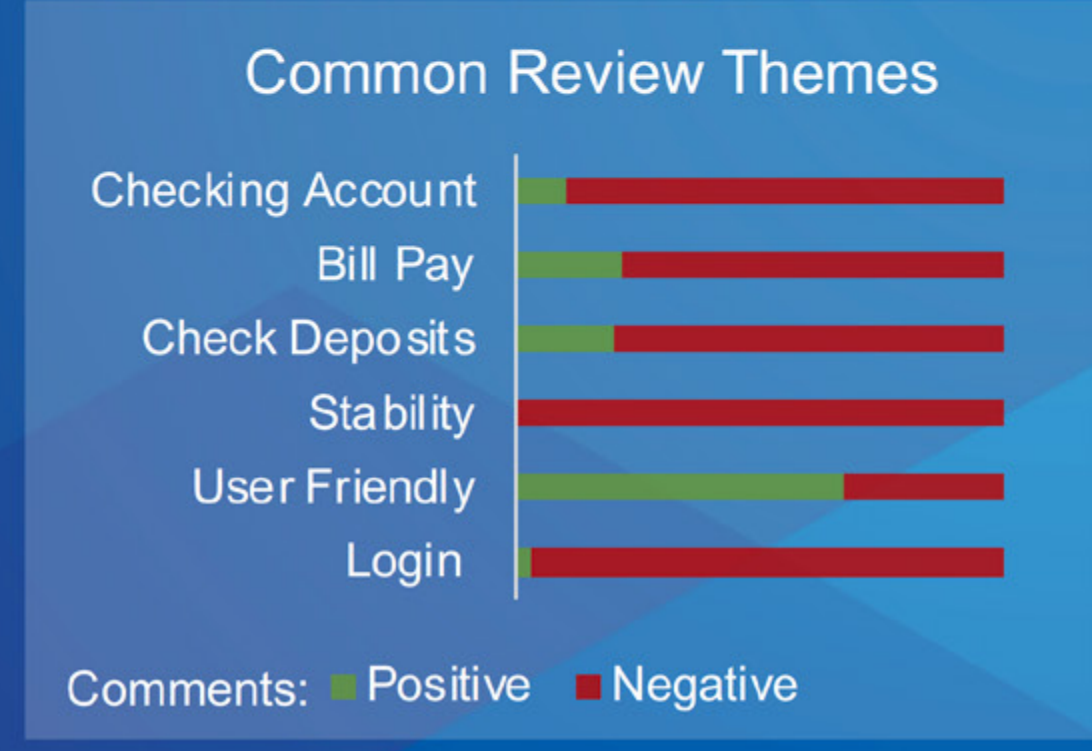
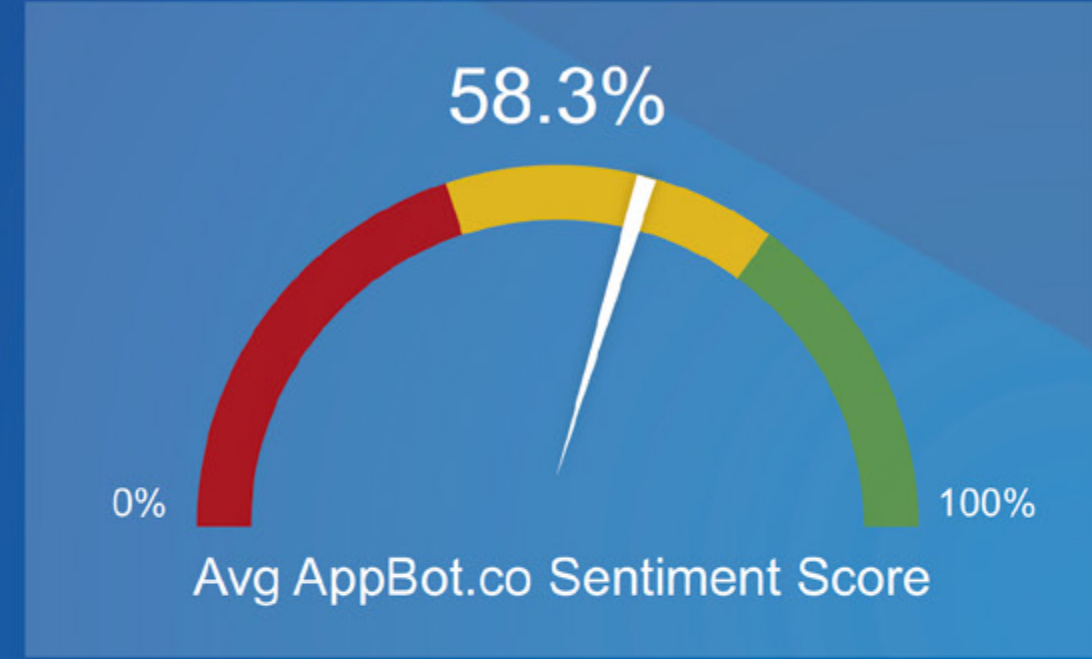
1.0 Observation

SCOPING THE LANDSCAPE

I want to know when there are problems with payments I have submitted so that I can resolve issues promptly

[View Research Doc](#)

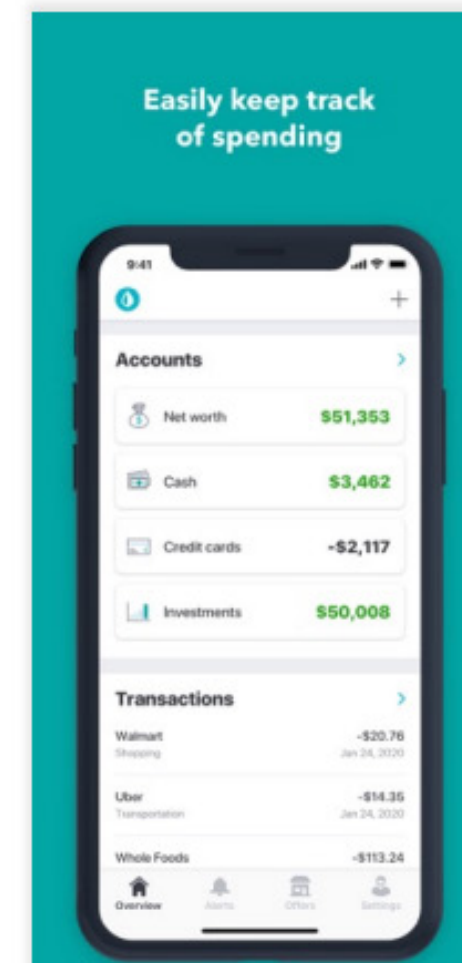
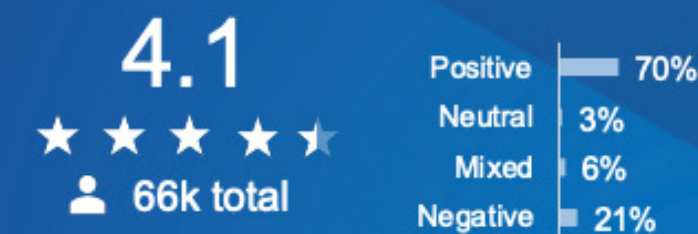
Overall Sentiment



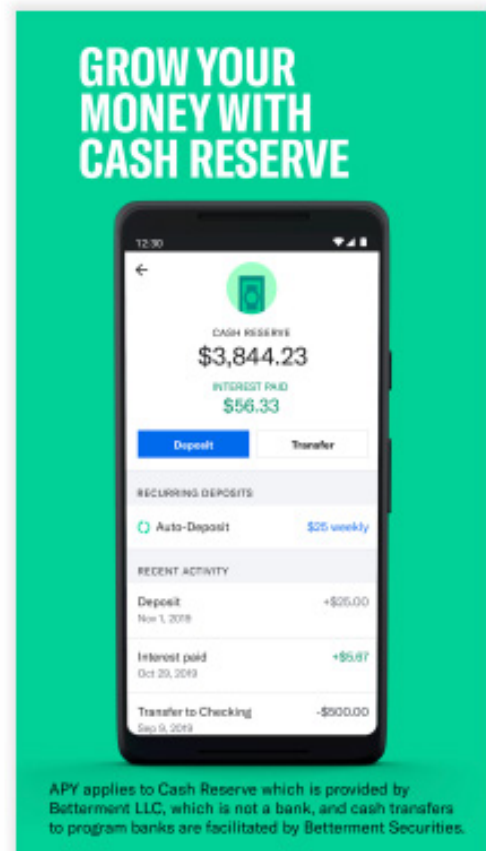
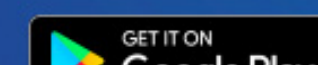
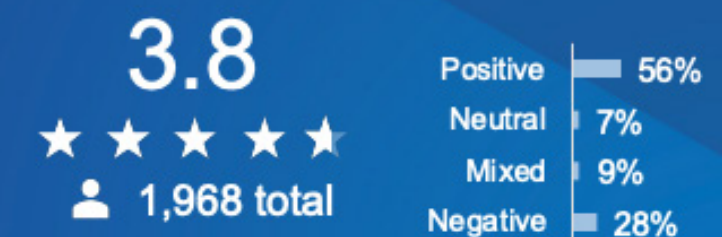
■ Positive ■ Neutral ■ Mixed ■ Negative

* Repeat of slide 8 for relevance to Sentiment Analysis

Mint



Betterment





PAYMENTS PROCESSOR

I want to know when there are problems with payments I have submitted so that I can resolve issues promptly

AP MANAGER

I want to see the big picture of where payments are in their life-cycle.

2.0 Ideation

PERSONAS & HYPOTHESES

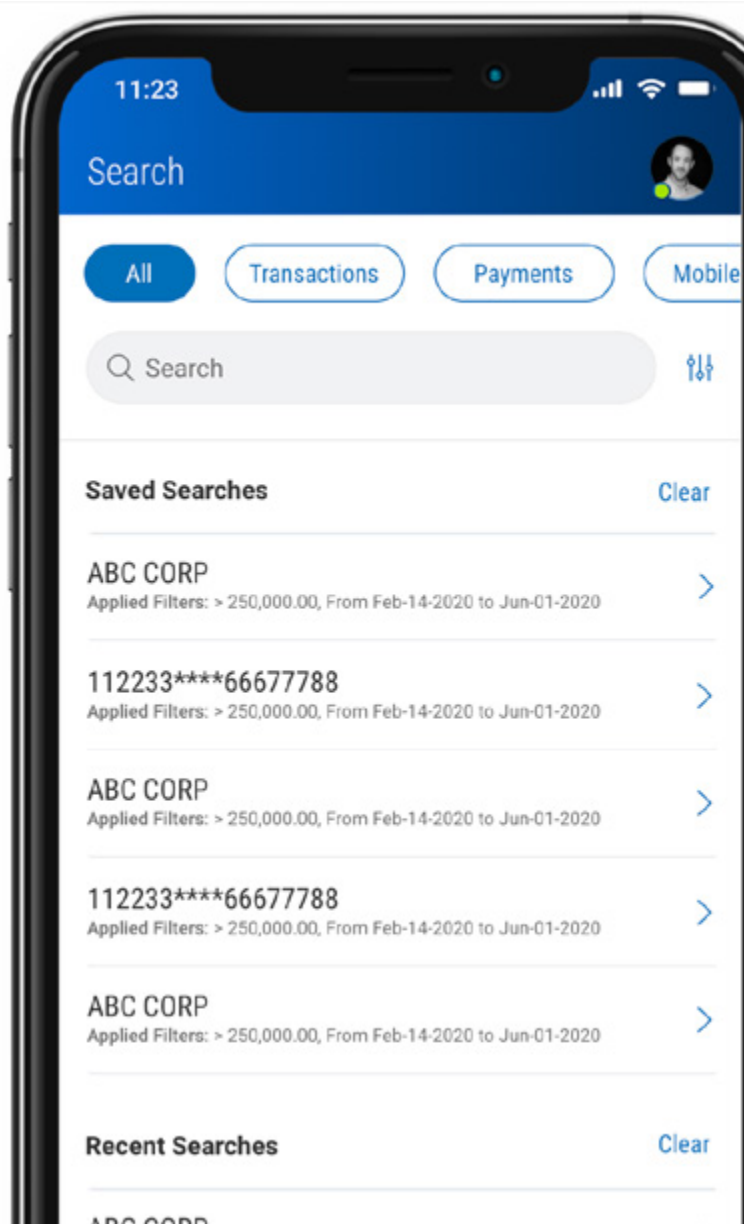
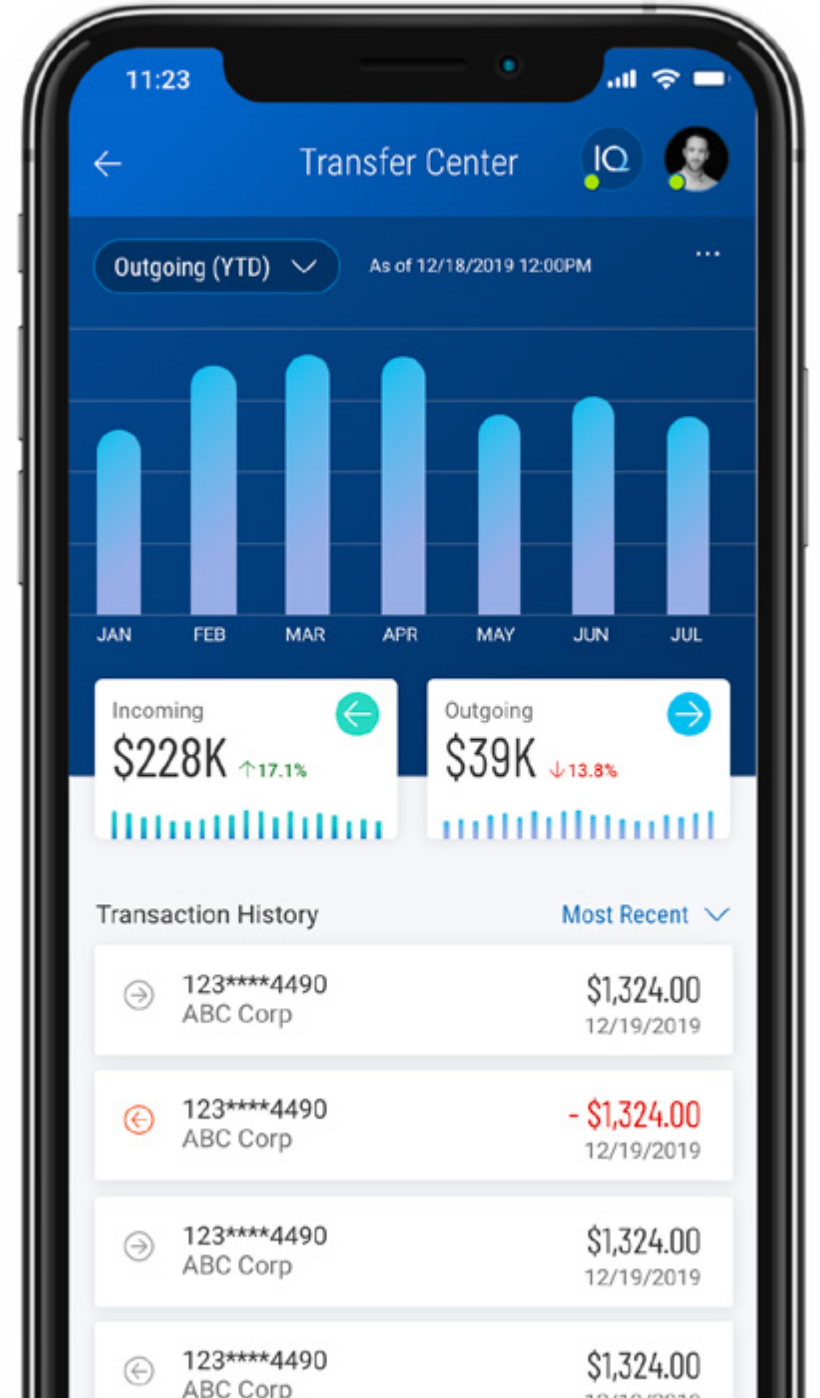
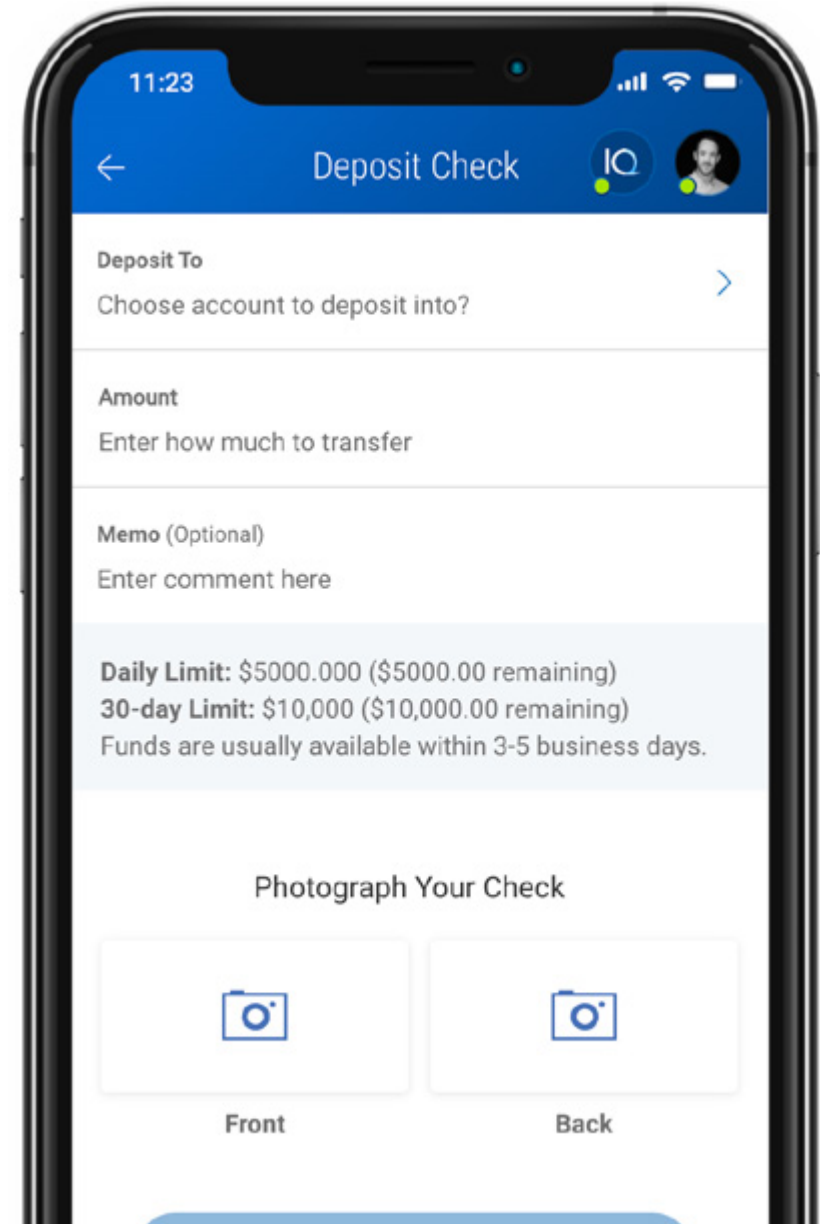
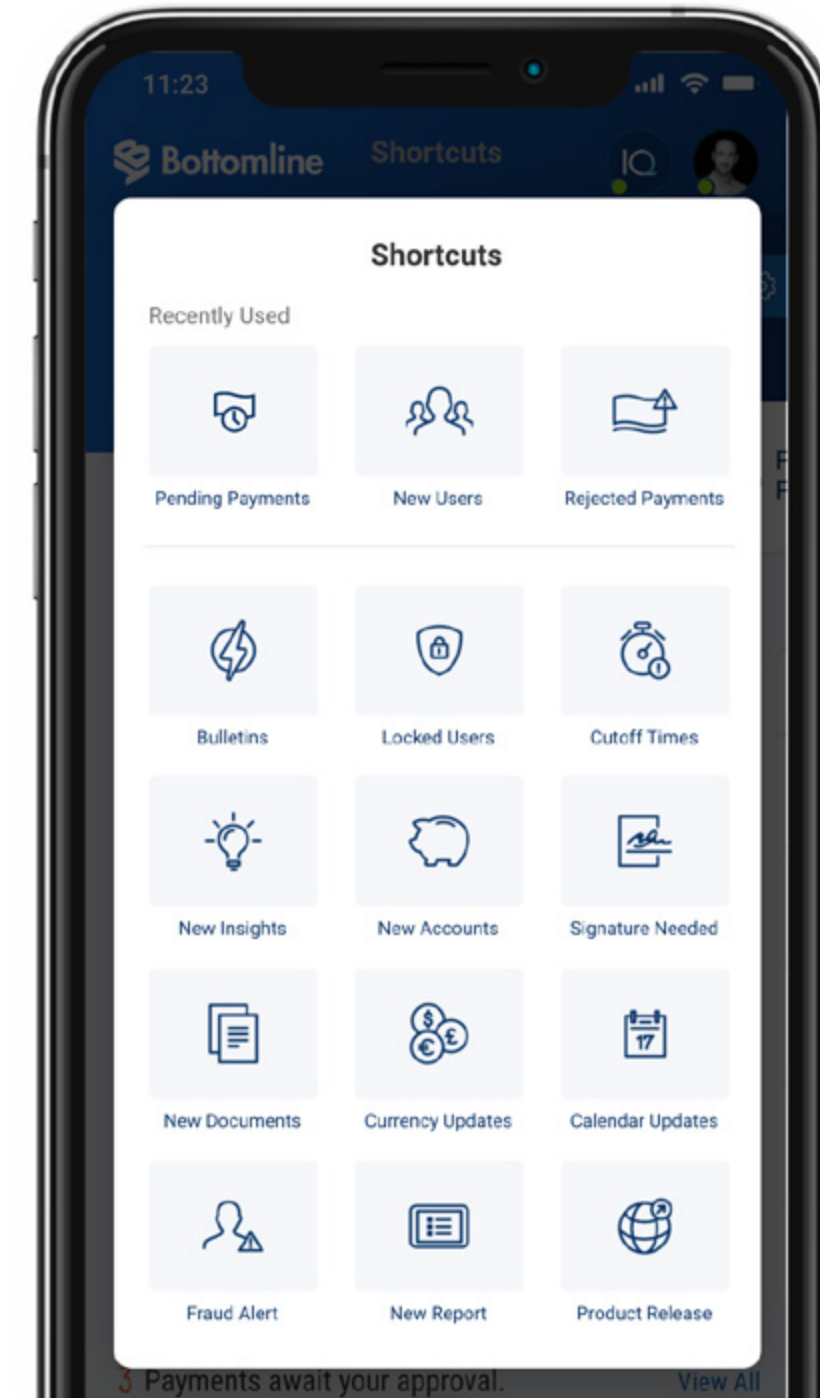
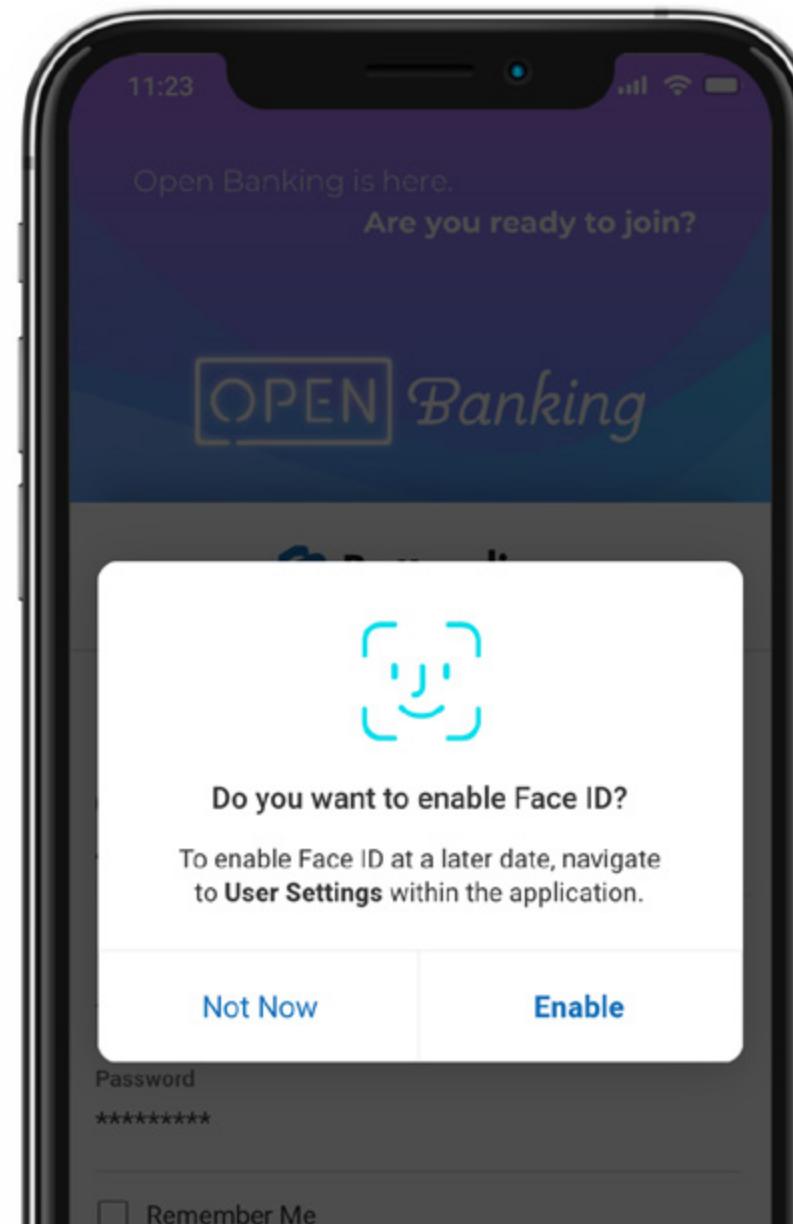
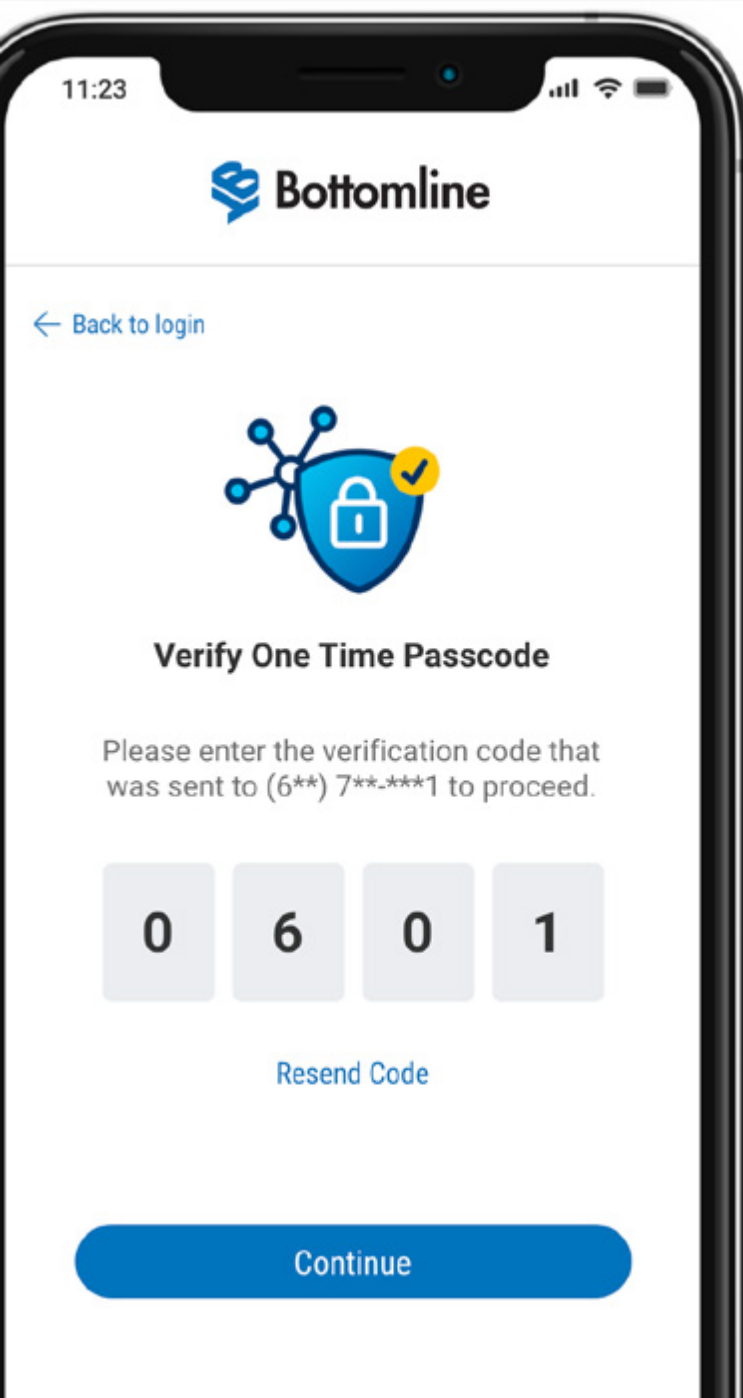
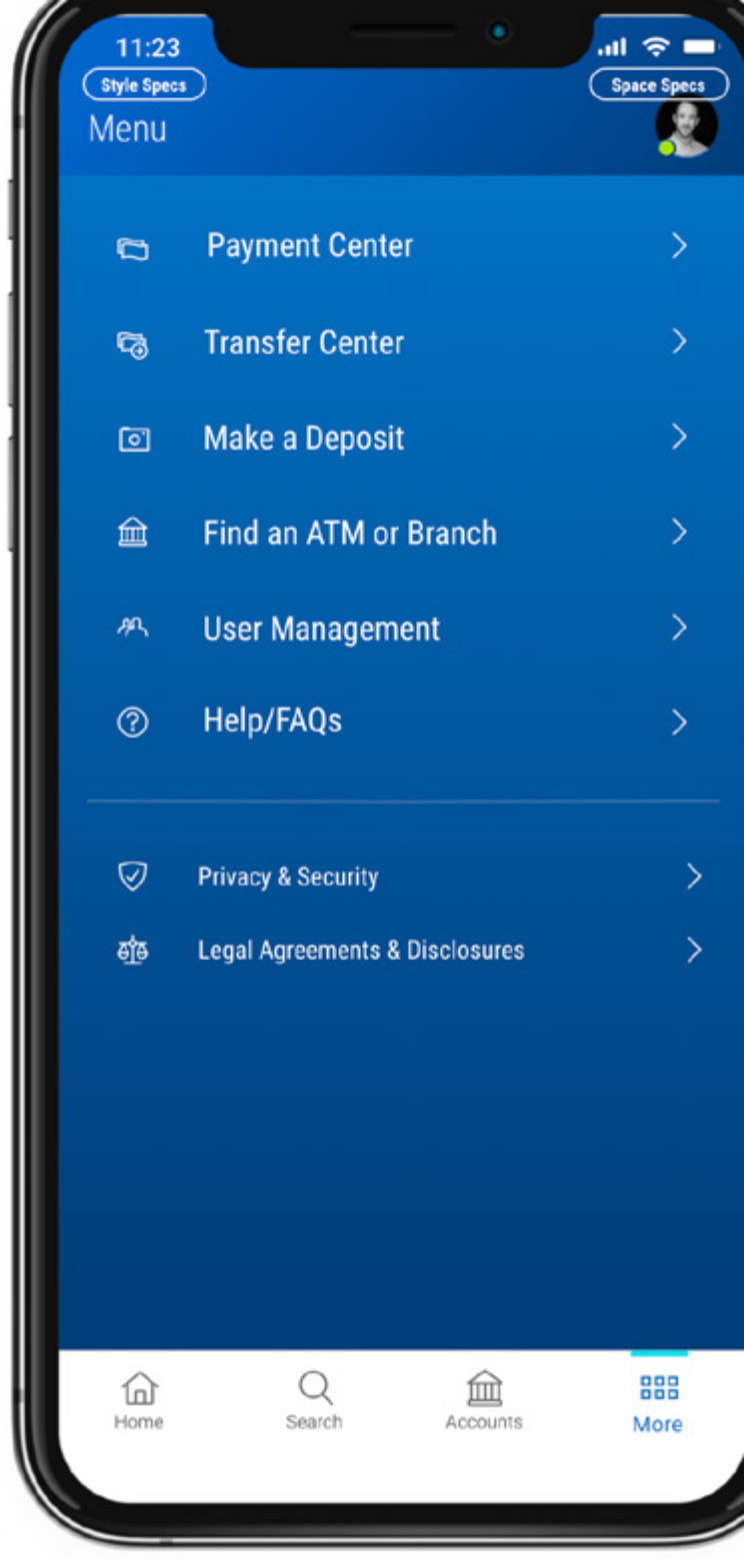
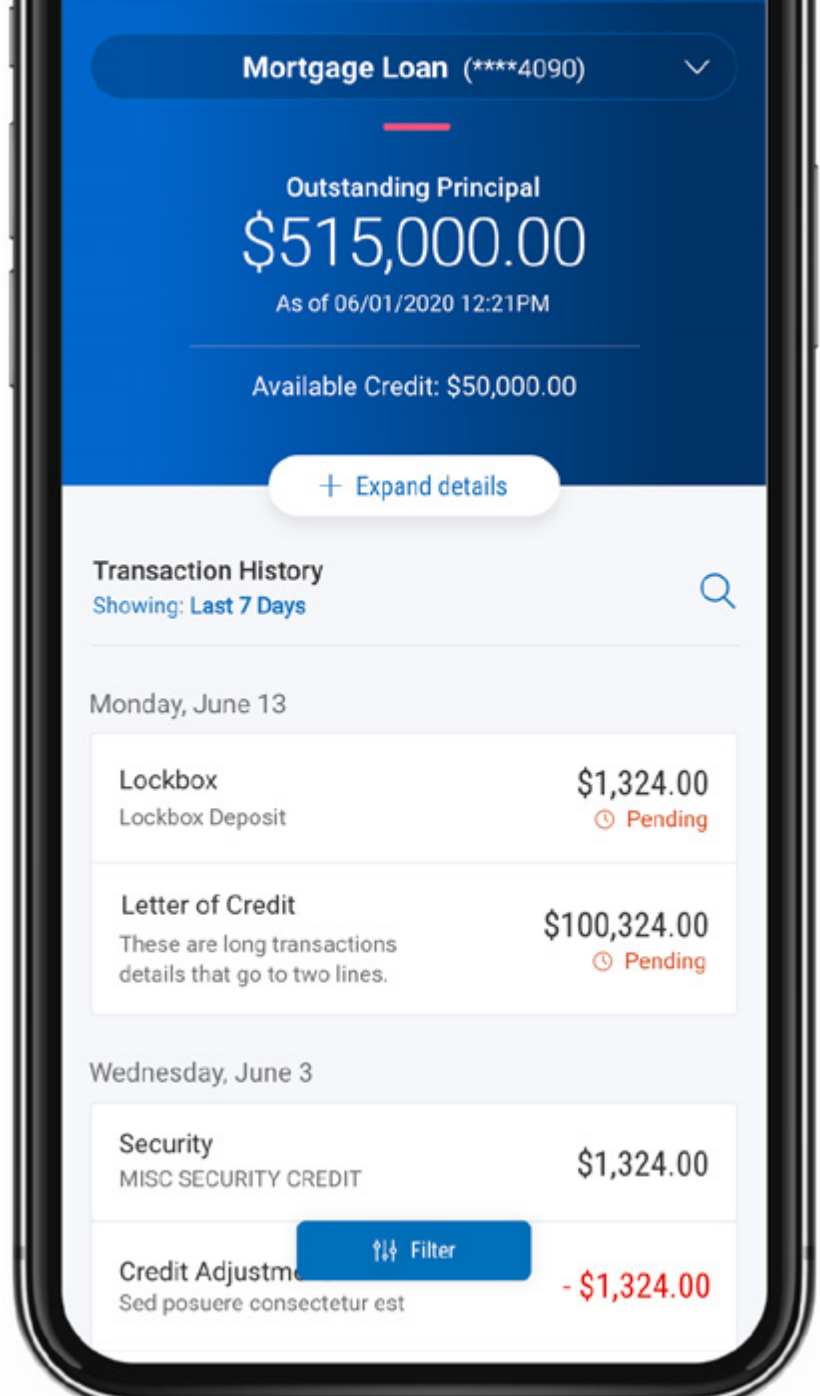
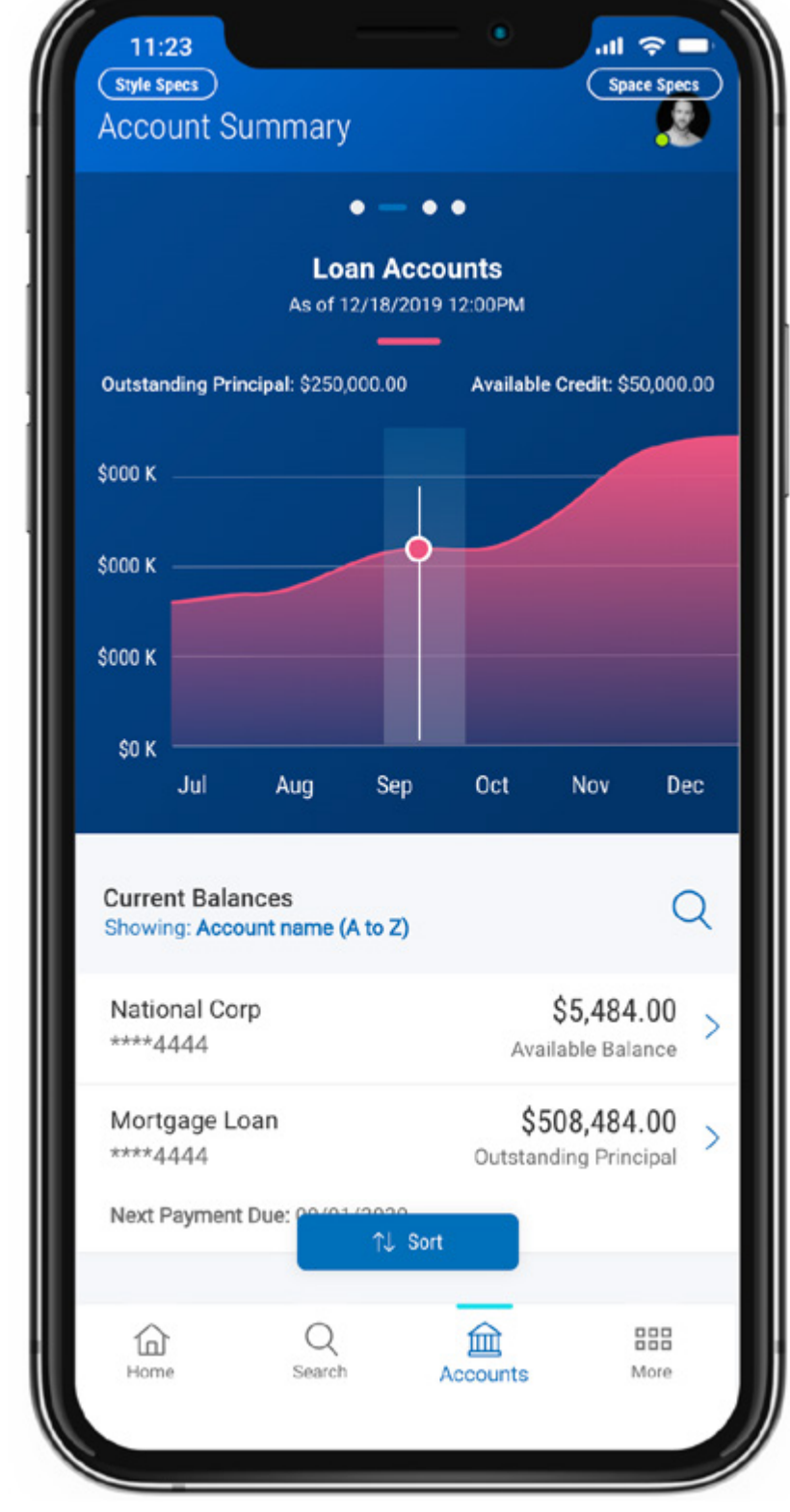
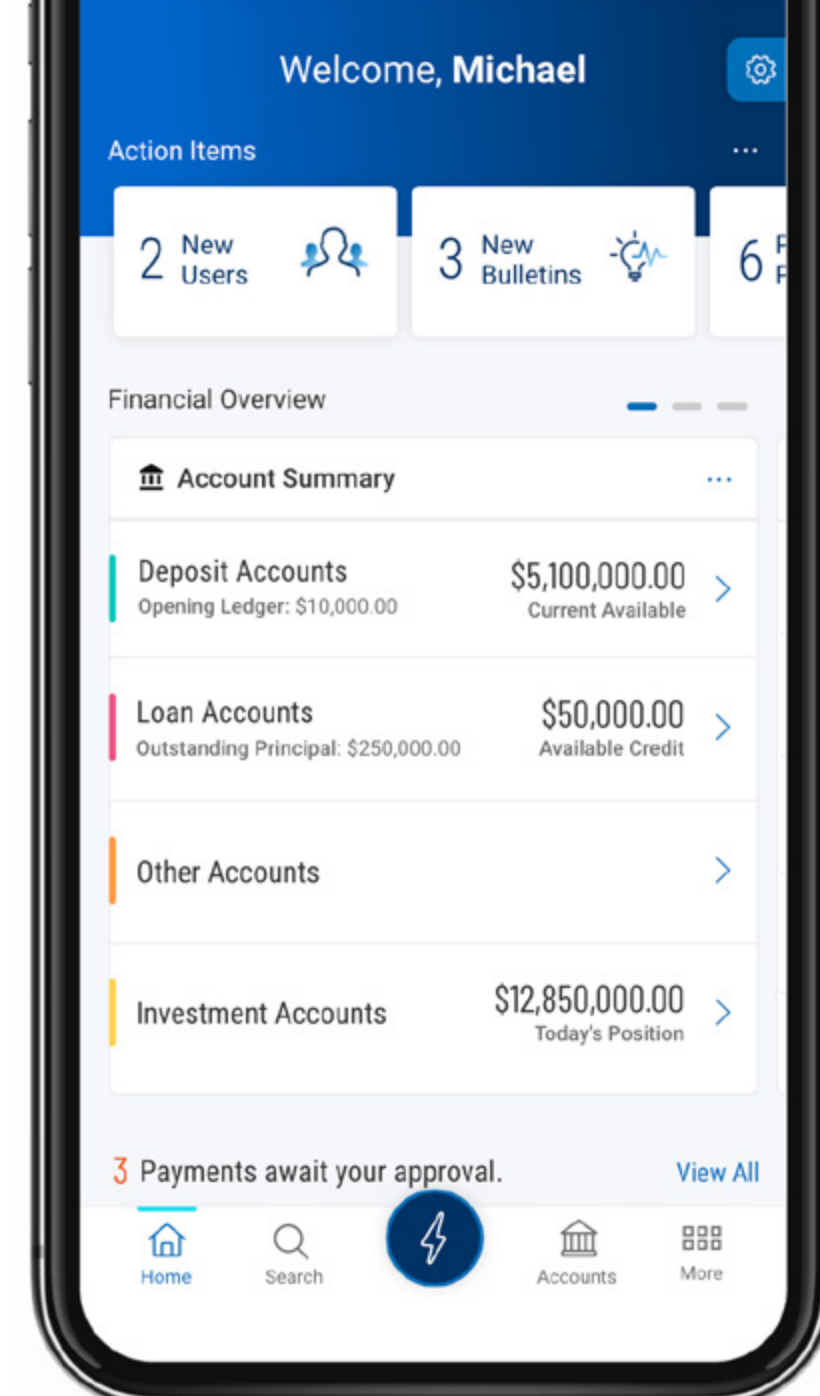
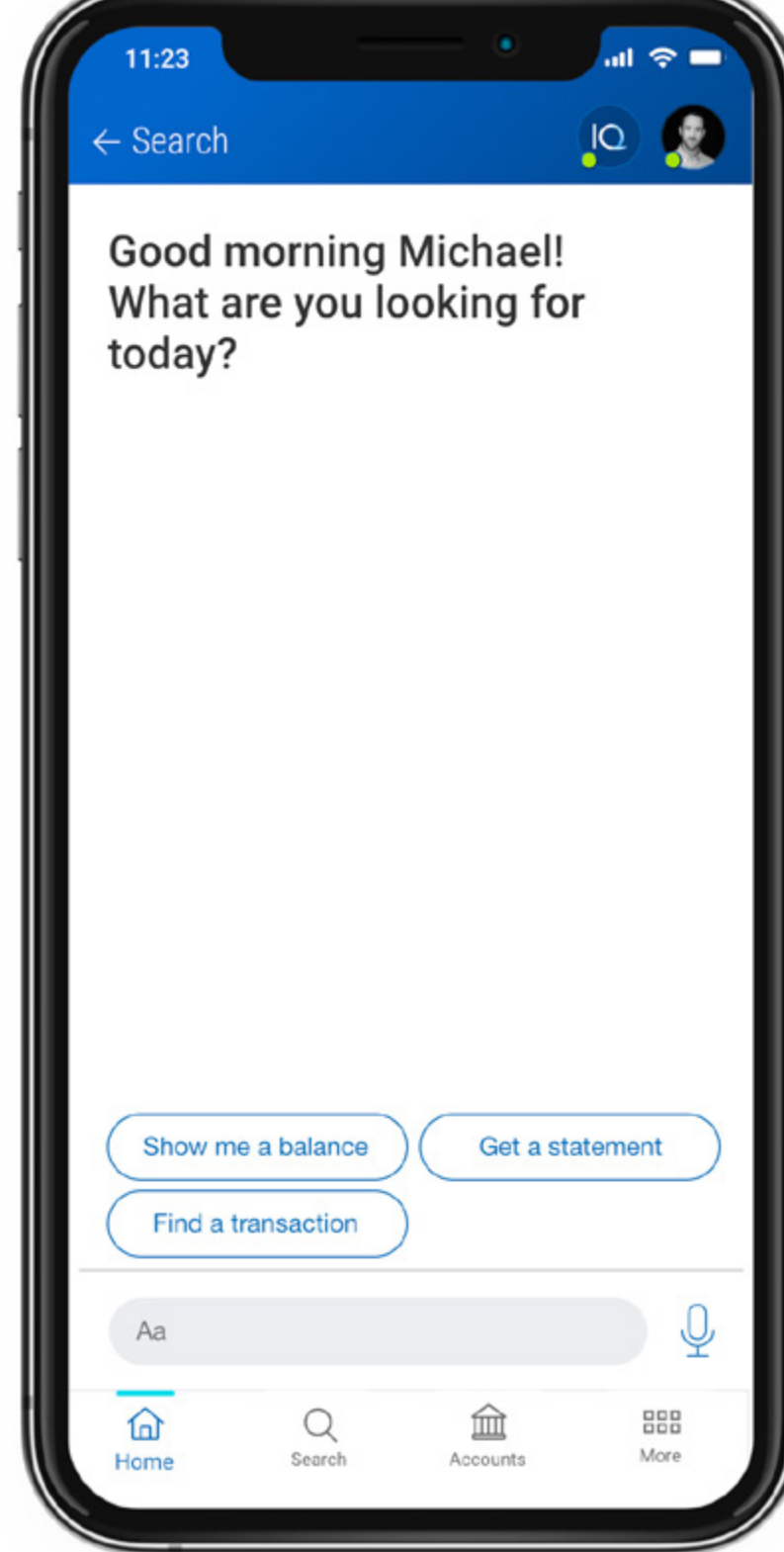
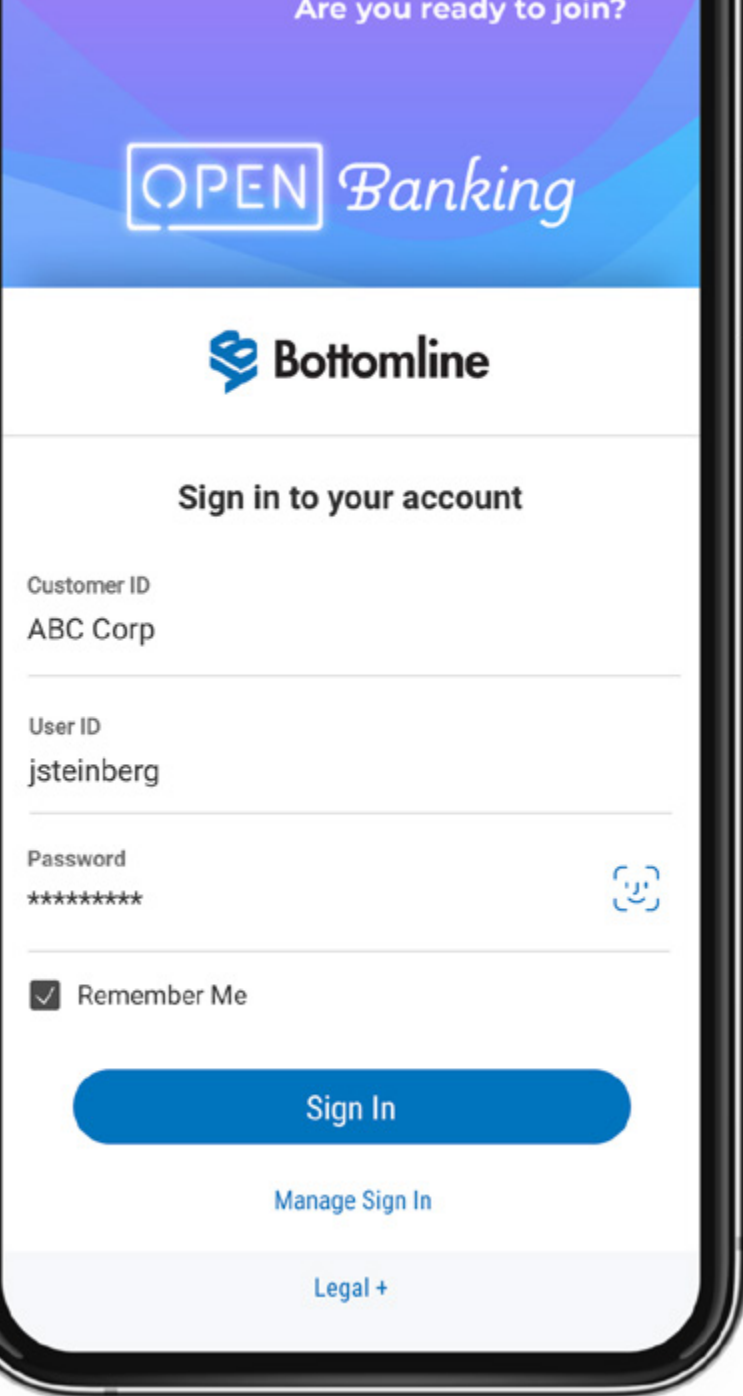
(Lean canvas)

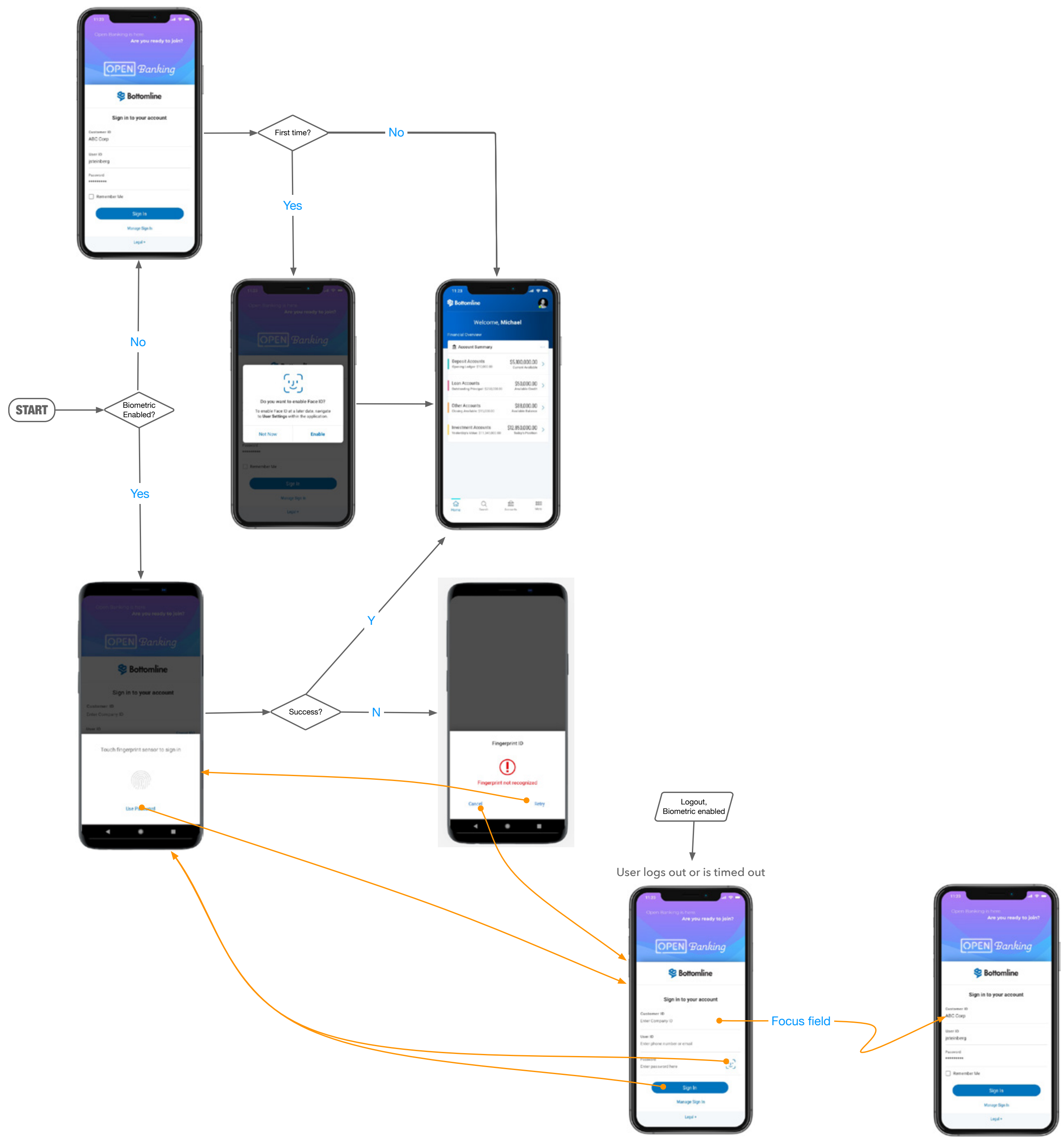
CASH MANAGER

I want a simple and clear view of my current account overviews

TREASURER

I want to manage the relationships with the banks that the organization works with

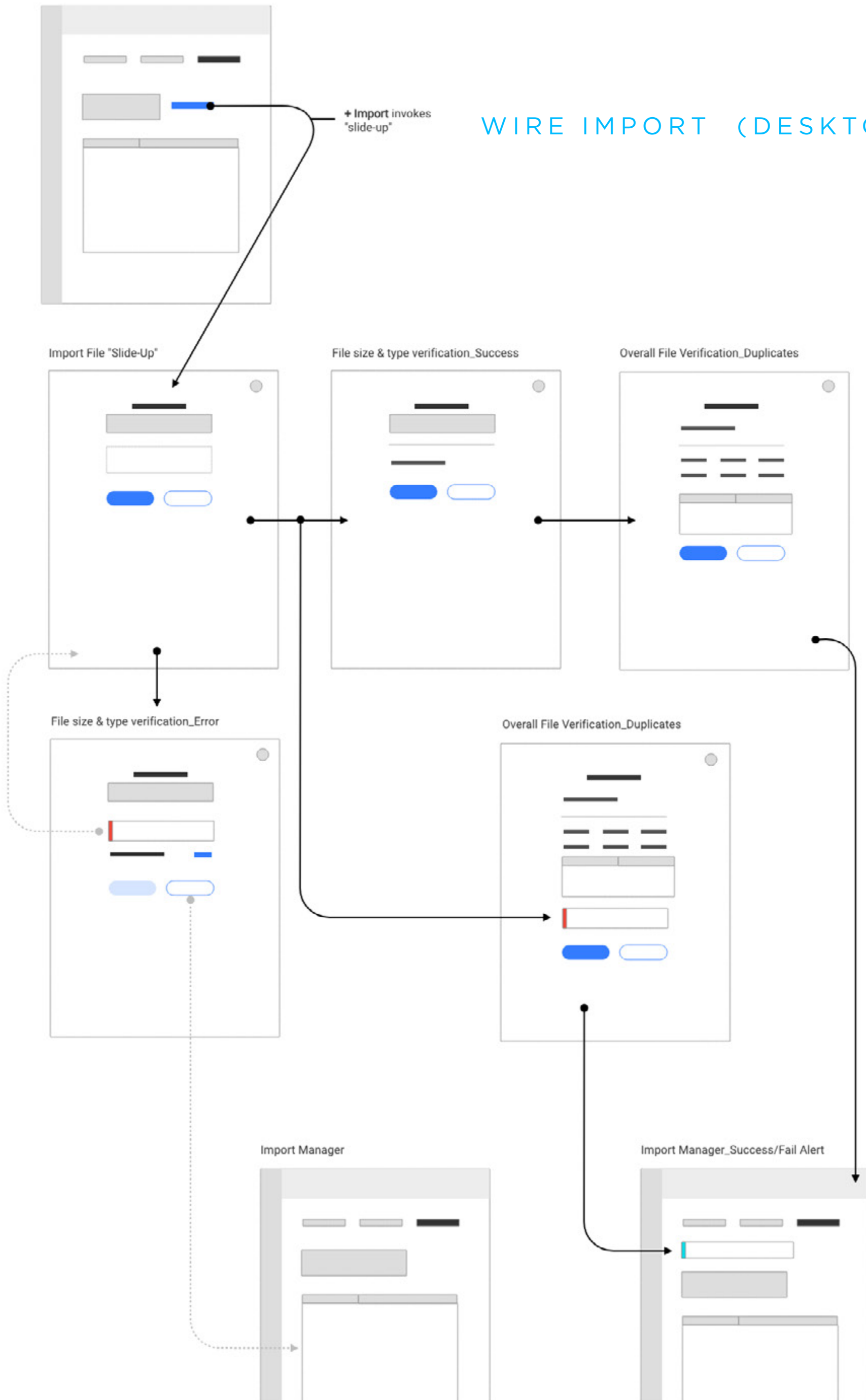




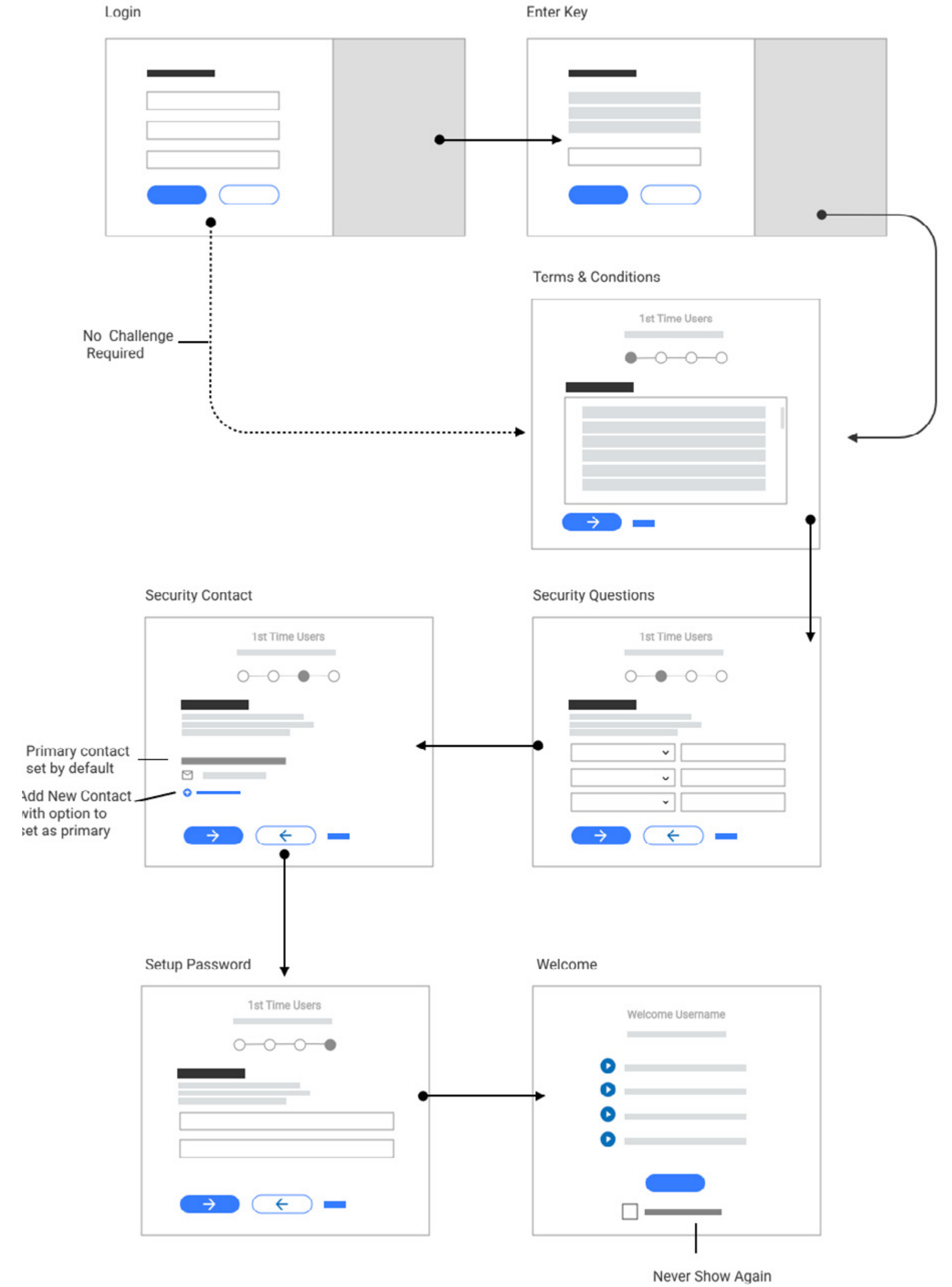
BIOMETRIC LOGIN FLOW



WIREFRAME IMPORT (DESKTOP)



1ST TIME LOGIN FLOW



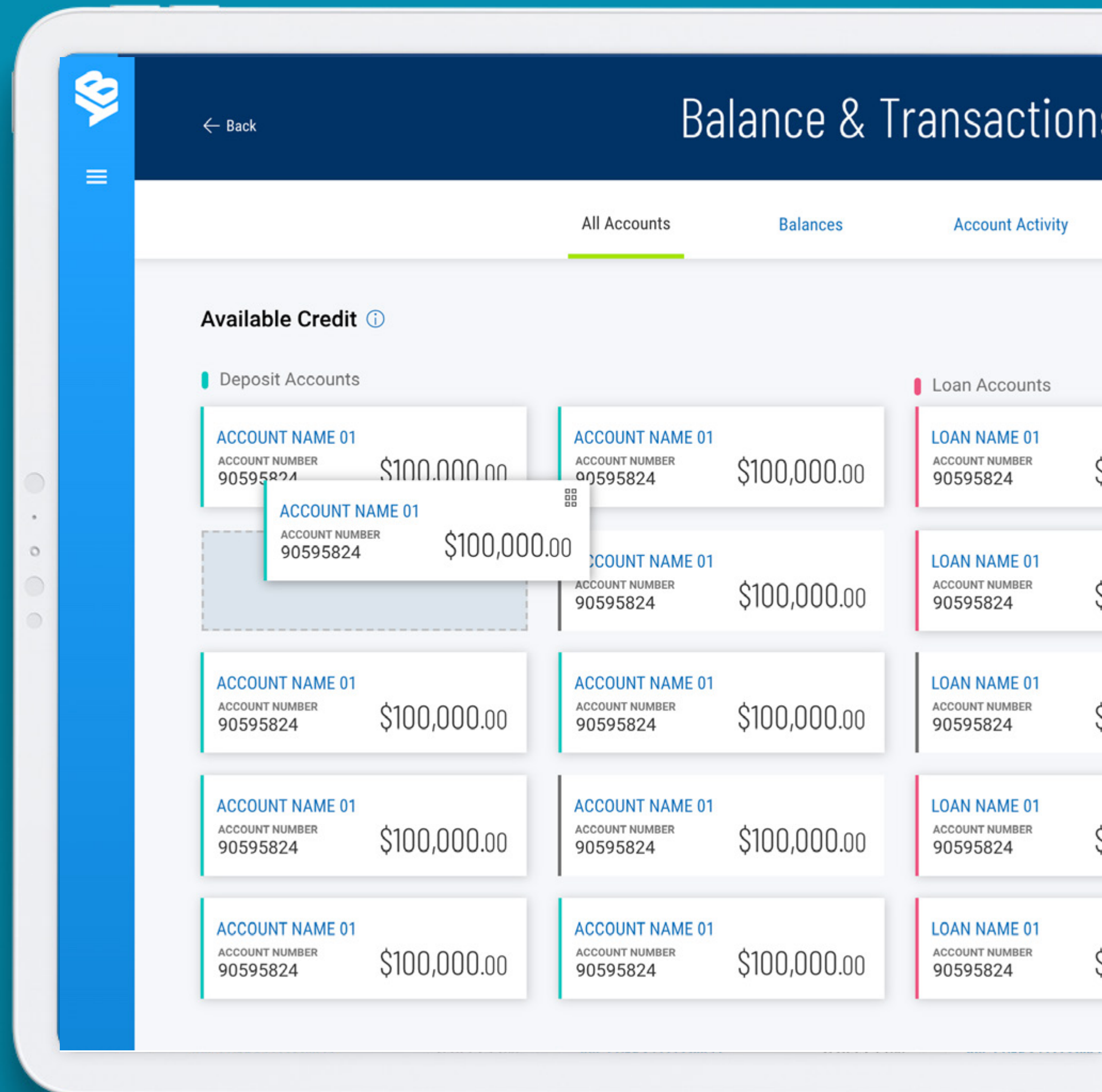
MAKING DIGITAL BANKING GREAT AGAIN

LESSONS LEARNED

The launch of the new mobile banking platform app that modernizes 30-year-old technology was a major success for the bank. By conducting thorough market research, developing a high-quality app, and executing a well-planned launch strategy, the bank was able to meet the needs of its target market and exceed expectations. The new mobile banking platform app has positioned the bank as a leader in the mobile banking industry and has set the stage for continued growth and innovation.

The bank was able to meet the needs of its target market and differentiate its app from competitors. Moving forward, the bank should continue to innovate and update the app to keep up with changing technology trends. Additionally, they should consider expanding the app's capabilities to include more advanced banking services and tools.

- BEWARE OF TOXIC USER CENTRICITY (*more is not always better*)
- PROCESS. PROCESS. PROCESS.
- TRUST YOUR GUT.
- OUR USER IS OUR ALLY.
- THERE IS ALWAYS ANOTHER WAY.
- DOING IT FAST IS NOT ALWAYS FASTER.
- PRODUCT LOYALTY IS VERY FRAGILE.
- CHANGE BRING OPPORTUNITY.
- BUT PEOPLE REALLY HATE CHANGE, ESPECIALLY WHEN THEY LOSE PRIOR FUNCTIONALITY..



- USE CASE -

SO YOU CAN
HUMAN MORE

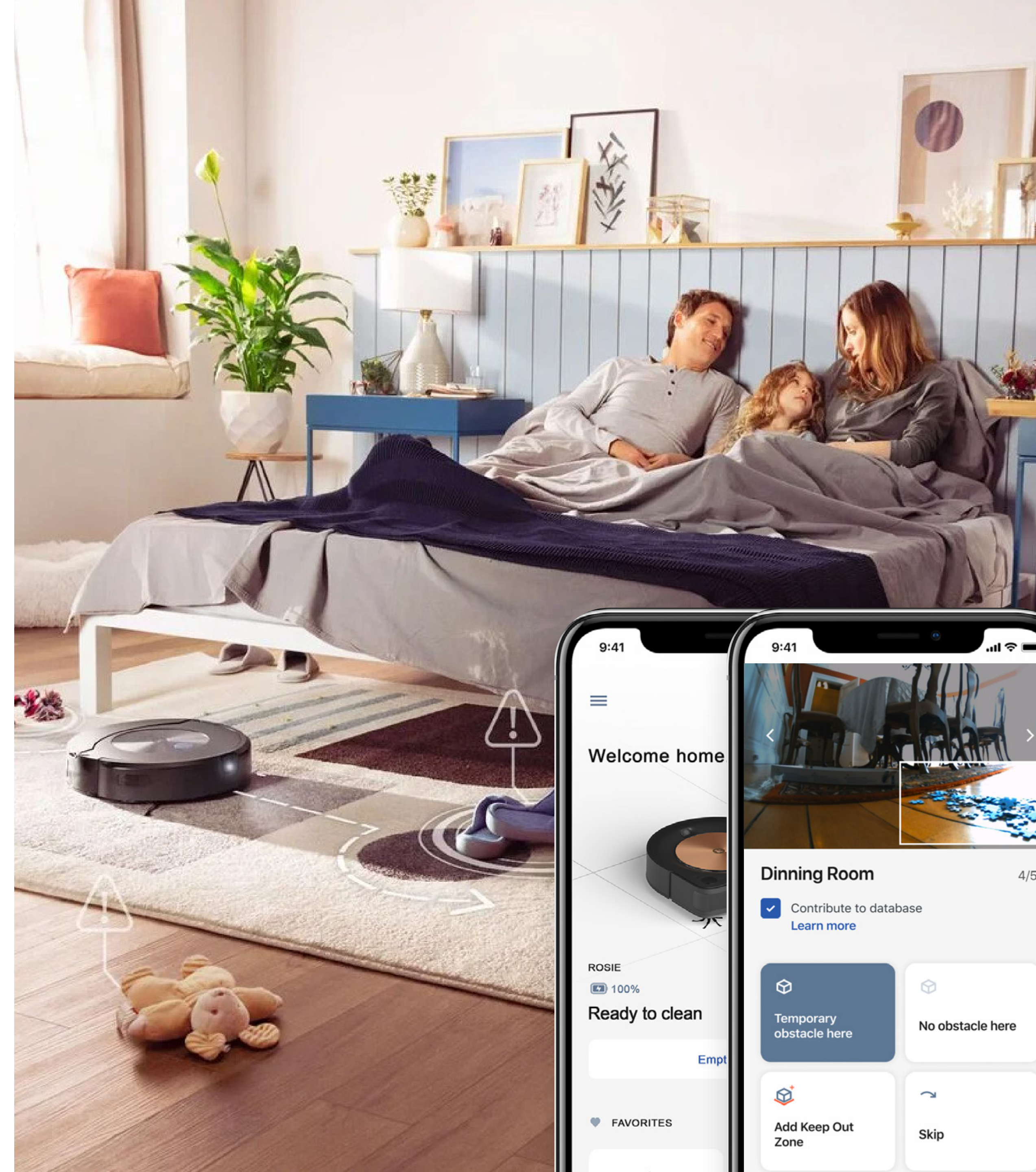
iRobot
USE CASE #2

SO YOU CAN HUMAN MORE

IROBOT J7+/J7 COMBO RELEASE
CODE NAME: SAPPHIRE

The first 2-in-1 of its kind. The Roomba robot has been a popular household item for years, providing efficient and convenient cleaning for homes all over the world. In 2022, the company launched a new version of the Roomba robot that utilized a front-facing camera and is capable of both vacuuming and mopping.

[VIEW PRESS RELEASE](#)



iRobot

ADVANCING THROUGH INNOVATION

SETTING THE STAGE

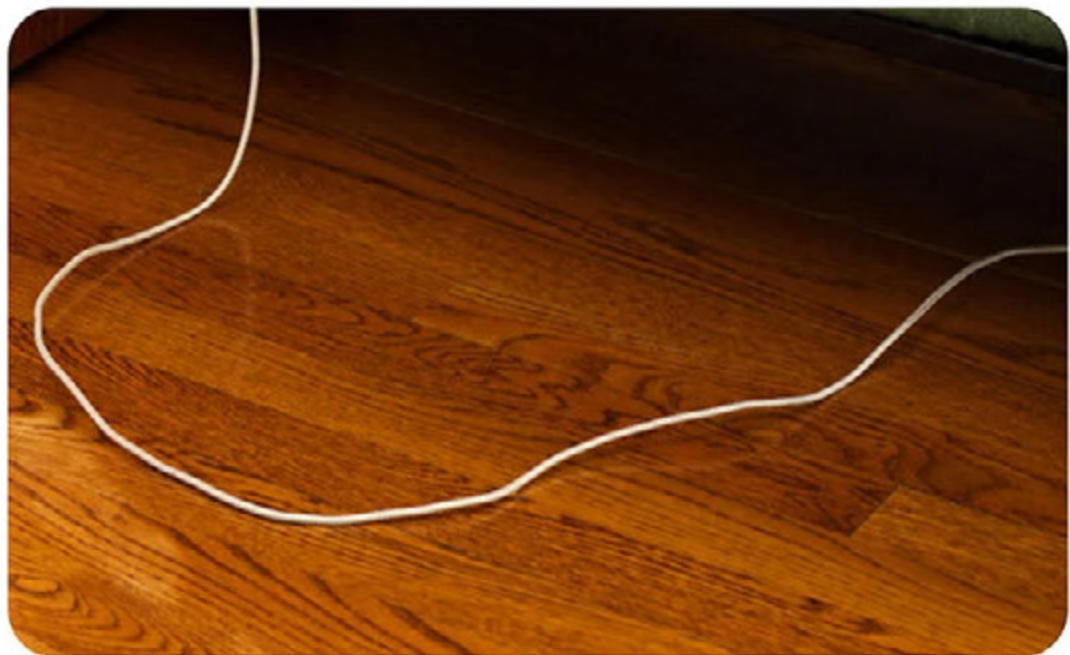
The front-facing camera alone changes the game and approach for iRobot. No longer were we relying on the outlines of the ceiling to map a room. One innovation provided a whole new way to human clean.





Is this an object to avoid?

Cord (Living Room)



Always Avoid This Object

My Role

During the development of this product, I bridged the gap between human and robot.

As the Principal Designer (IC), my role was to lead a team of designers, own the mobile application integration, and facilitate the partnership with the Industrial Design and Development teams. Our goal was to create the best hardware & software experience that integrated seamlessly into our existing mobile app.

Challenges

The introduction of a front-facing camera AND the dual functionality of the robot definitely came with some new risks to address when integrating into single source control (mobile app).

- All robots (mop, vac, 3rd-party) use the same mobile platform for remote activation - this includes all products old and new
- Image tracking and recording of locations increases the risk of privacy and personal information that needs to be addressed
- Item detection flow needs to be considered for Mapping a room (when & where to map/vac)
- How is on-boarding of the robot different than existing robots

+ many more

iRobot

"Alexa, tell Roomba Combo to vacuum and mop in front of the table."



Areas for Consideration

Connected Devices (IOT)

How does the new J7/J7+ interact with Siri, Alexa, Google, etc. and the new prompts necessary to communicate the improved functionality (includes Siri shortcuts).

Smart Mapping & Scheduling (Mop and/or Sweep)

Roomba robot vacuums with Imprint® Smart Mapping can automatically detect and proactively recommend Clean Zones around dishwashers, toilets, ovens/stoves, litter boxes and pet bowls. Users are also able to customize their Smart Map by designating their own precision Clean Zones and how to clean.

Data, Privacy, and Security

This one is a hot topic and a big challenge to overcome. With the front-facing camera, the user must have control over those images and understand their rights, while maintaining their trust in iRobot.

Additional Considerations

On-Boarding & Provisioning

Item Recognition & Commands

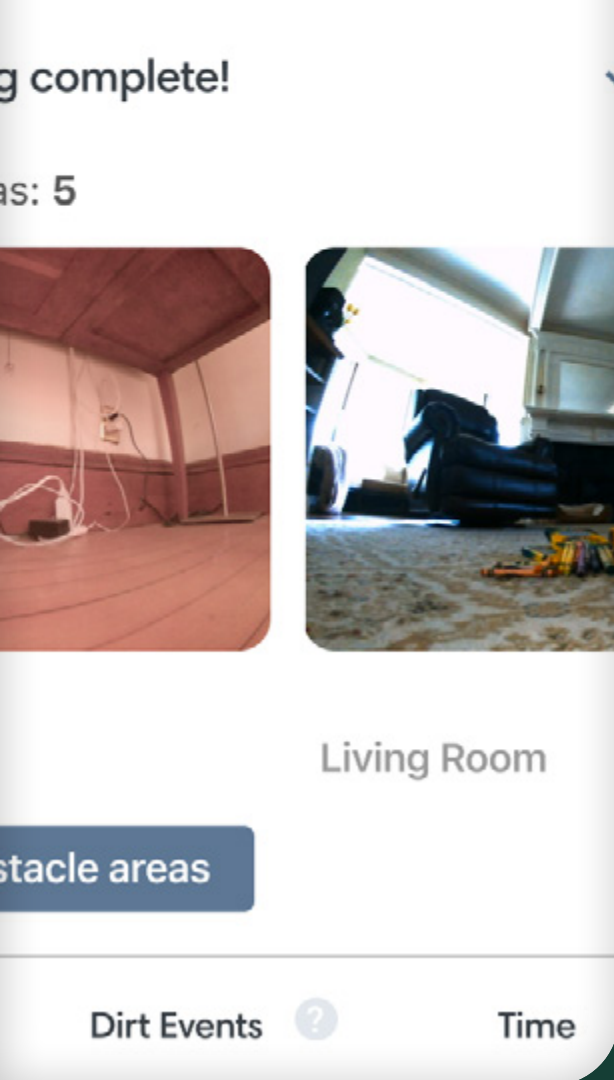
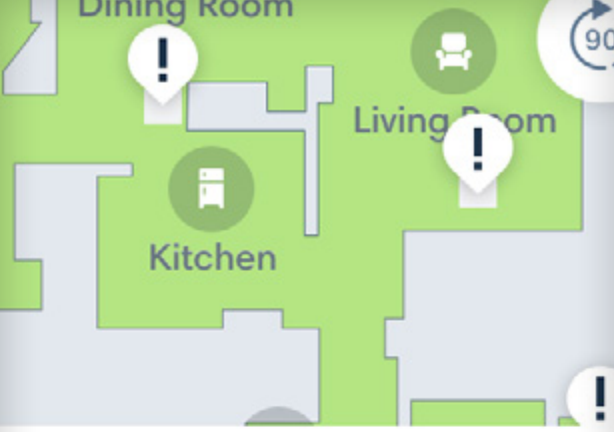
Location Services & Patterns

Edge Cases & Learning Opportunities

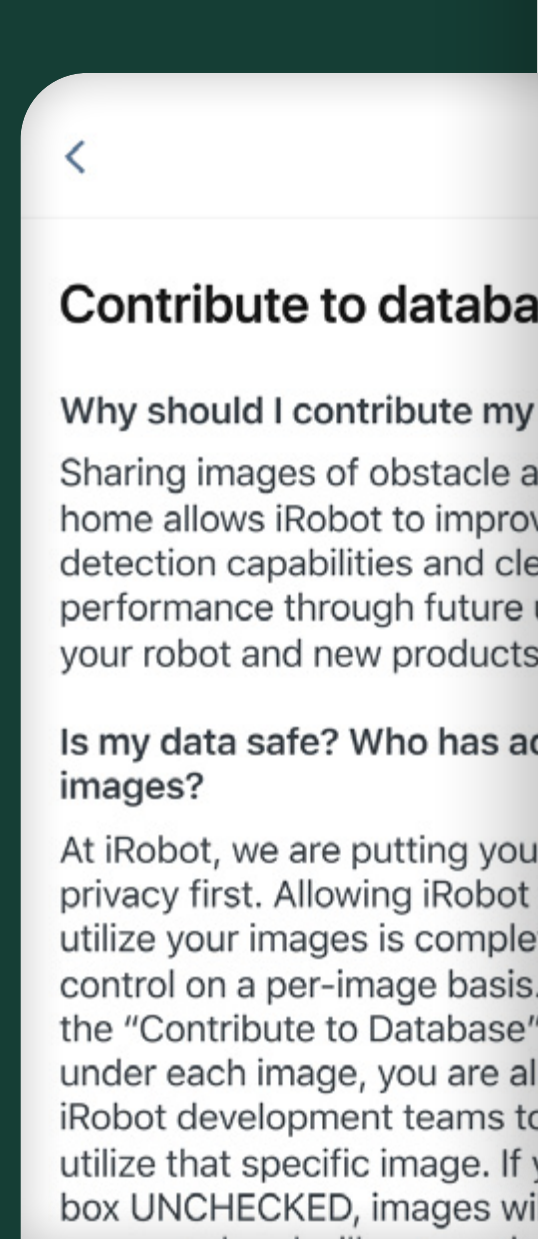
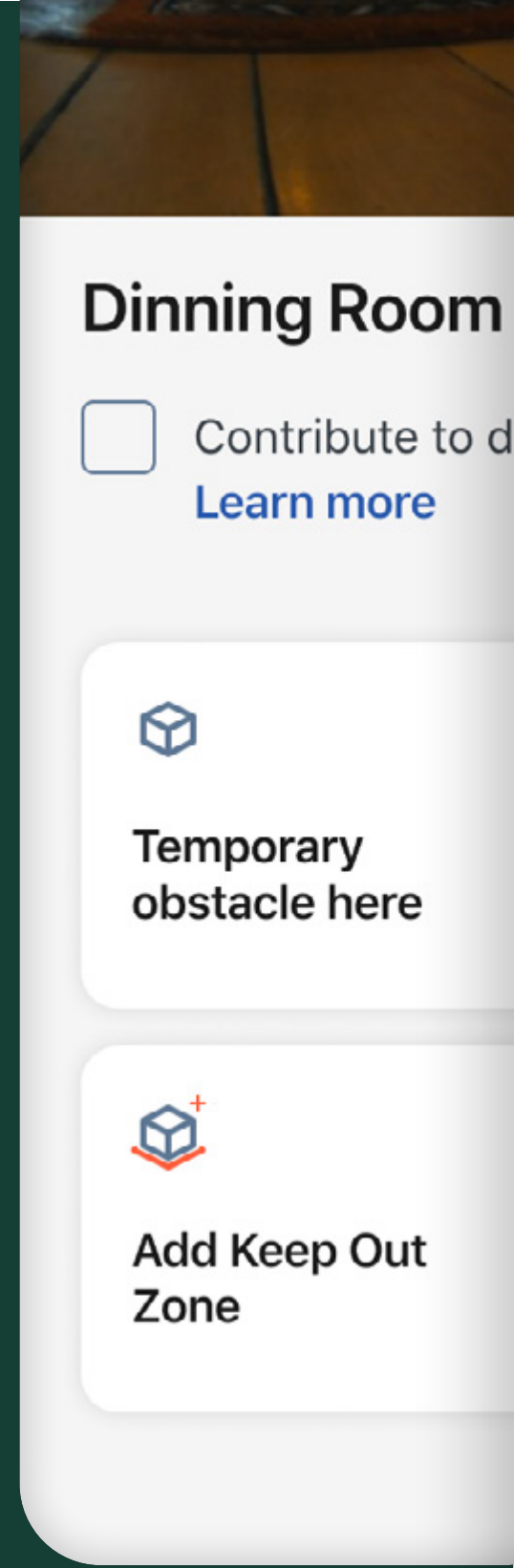
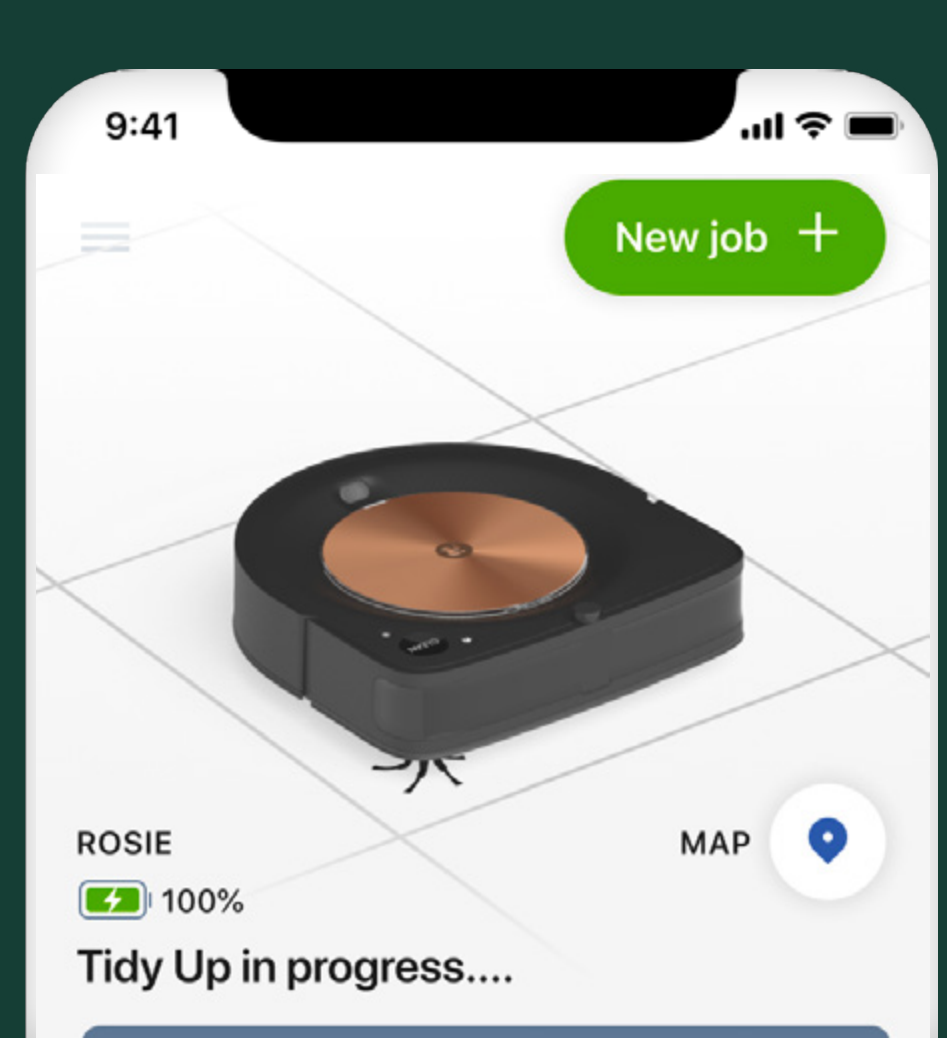
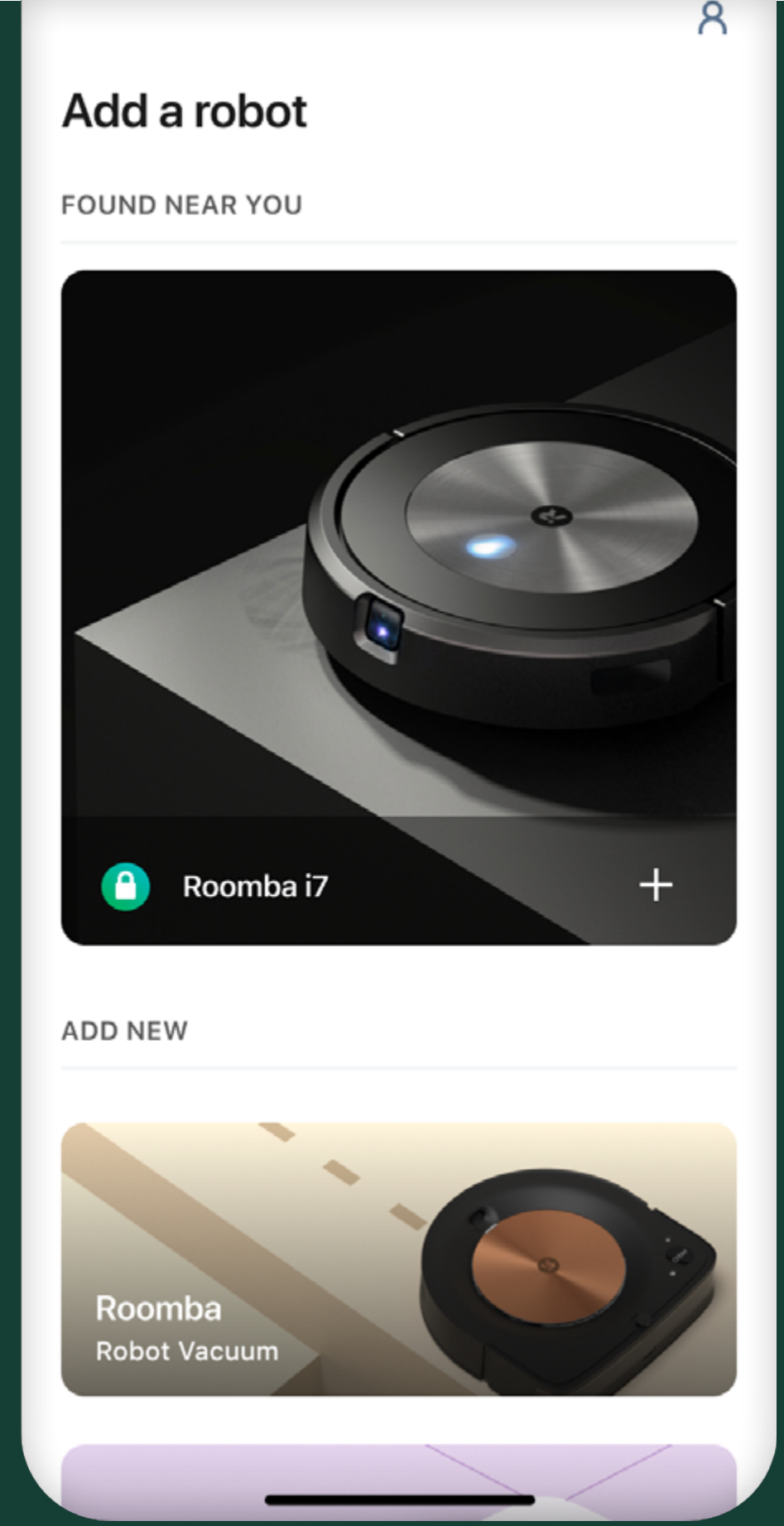
Home Screen Integration

Robot Interactions & Visual/Audio Responses

Error Handling






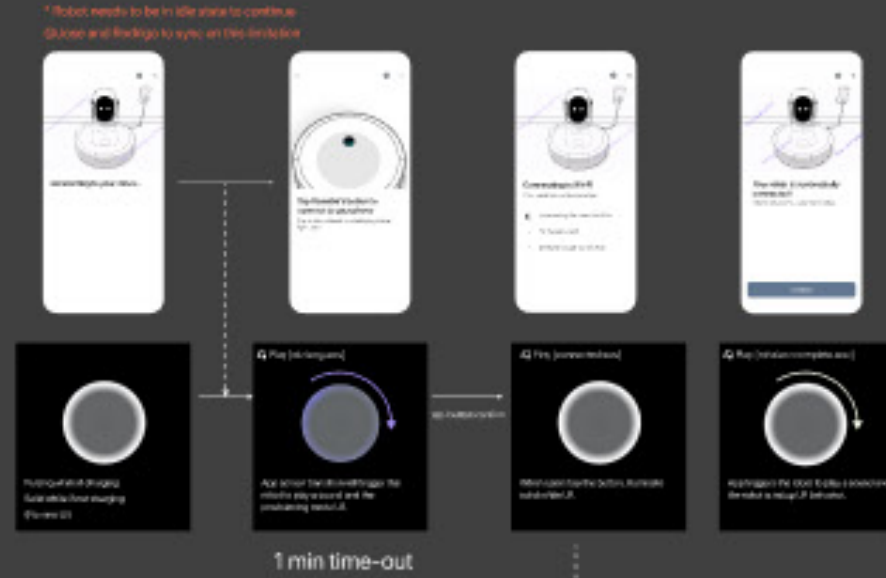





...e you review, the Jared becomes



iRobot

**INNOVATION
COMES FROM
THE WAY
THAT THE
TECHNOLOGY
IS APPLIED.**

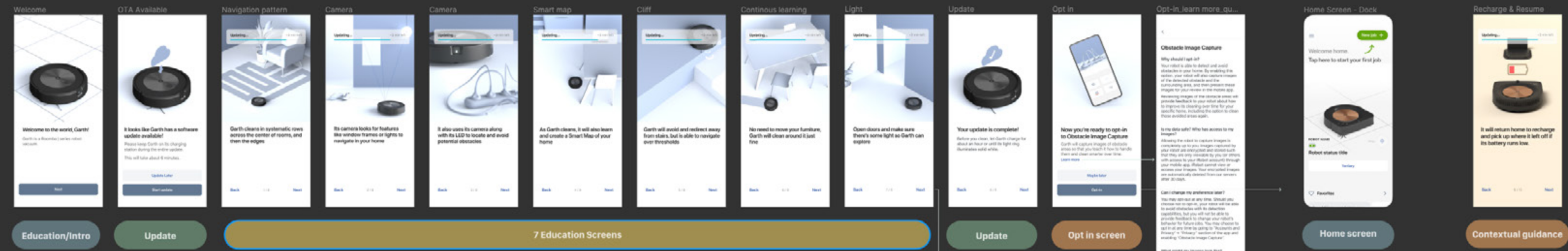
Exploration of Robot Behavior (Hardware & Software)

	<h2>Not provisioned</h2> <p>As long as a robot is awake and not provisioned, it is broadcasting BLE and Wi-Fi softAP. There are no UI indicators of the broadcasting activity (no dedicated LR or sound) before the App connects to the robot.</p>	<h2>During setup</h2>	<h2>Provisioned</h2> <p>Reprovisioning Case: Update Wi-Fi pass, change to a different Wi-Fi, set up a previously provisioned robot (second hand)</p>	
<h3>Light ring</h3>	<p>Wake-up state</p>  <p>No LR or sound change from the current behavior upon robot wake-up.</p> <p>Robot wake-up can be triggered by</p> <ul style="list-style-type: none"> • Users placing the robot on the dock out of box for the first time • Users tapping the button or touching the bumper • Any other wake up activities defined. 	<p>Idle state * = not in a mission. Paused state is in a mission</p>  <p>20 min after idle</p>  <p>LR</p> <p>No LR or sound change from the current behavior.</p> <p>When a robot gets into an idle state, a 20-min timer starts. After the 20-min time-out, the LR fades out.</p>	<p>Provisioning</p>  <p>1 min time-out</p>	<p>Jessie to update. <u>MUX-1103</u></p> <p>Link to app design in progress</p>
<h3>Bluetooth & Wi-Fi status</h3>	 <p>Once waking up, the robot will broadcast BLE and Wi-Fi softAP signal.</p> <p>(From out-of-box waking up, broadcasting will happen after</p>	 <p>20 min after idle</p> <p>The broadcasting is always ON until a robot gets into an idle state and then a 20-min timer starts. After the 20-min time-out, the broadcasting will stop (as the LR fades out).</p> <p>This meets the requirements from EU energy regulation and security.</p>	 <p>Broadcasting is ON until a robot starts connecting to the network device/router.</p>  <p>If provisioning (local connection) fails or times out, the robot should restart OOB broadcasting immediately.</p> <p>@Jose to confirm: is the time-out 30 sec?</p>	 <p>Once waking up, the robot will broadcast BLE. Wi-Fi softAP will be down.</p> <p>Bluetooth broadcasting stops 20 mins after idle.</p>
<h3>UX</h3>	<p>What does this mean to users?</p> <ul style="list-style-type: none"> • As long as a robot is awake and not provisioned, it is broadcasting. • This includes when a robot is in a mission (running or paused). • Provision during a mission is not wanted by us (experience and security), but we want to allow the app to discover a robot when a user accidentally puts it in a mission state. Upon connecting, if a robot is running, the app will not move forward to tap-button confirm step. Instead, the App will say "Couldn't continue setup" and guide users to pause the robot first. 	<p>What does this mean to users?</p> <ul style="list-style-type: none"> • The app should always be able to discover a no-provisioned robot, so users don't need to select from the model list if their robots are awake. • Because robots are always broadcasting now, per security requirement, we need to provide tap-robot-button confirm step. There is a 1 min time window after the app connects to the robot. • To be secure, the app will not continue if a robot is running (prevent the next-door neighbour case). 	<p>What does this mean to users?</p> <ul style="list-style-type: none"> • Provisioned robots that are not in this account will show up in Add a robot. • If a used robot is awake (connected or disconnected to wifi), new users can find it from add a robot screen and be guided to set it up in the app. • Neighbors' robots close to you will show up in the provisioning flow. 	

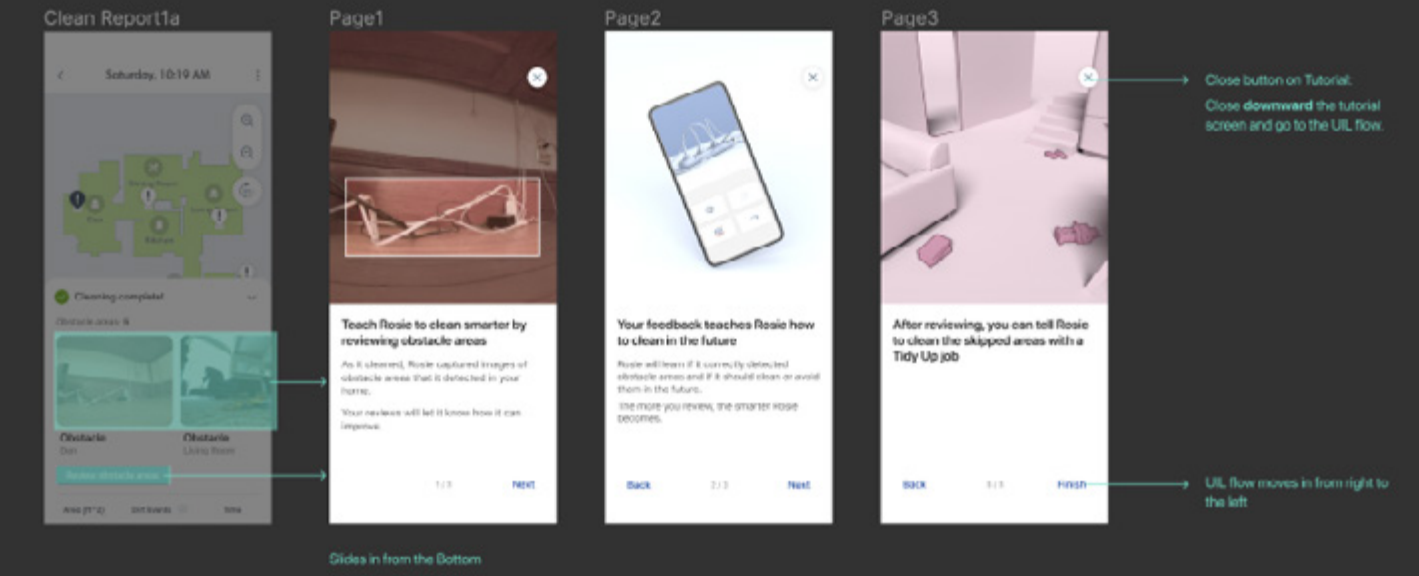
Exploration of Robot Behavior (Hardware & Software)

View Figma File

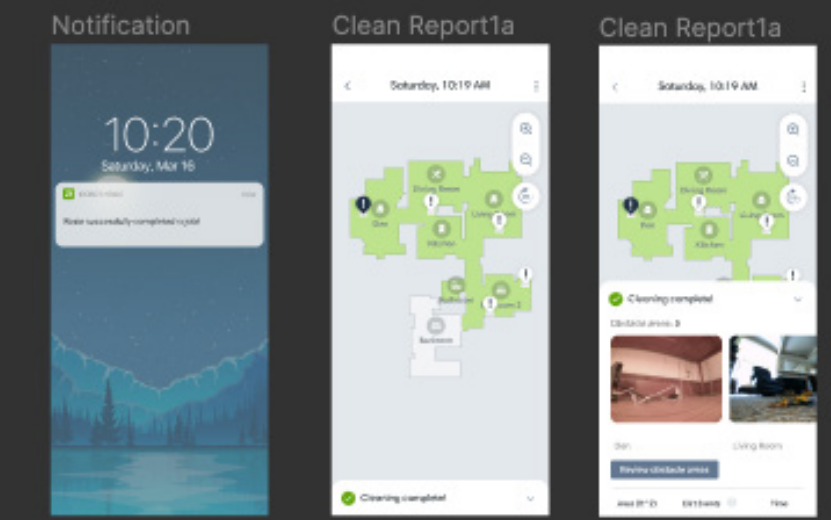
Robot Provisioning & Coaching



1st-time Tutorial



Map View and 'Tidy-Up'



Cloud Database Contribution (AI Image Recognition Library)

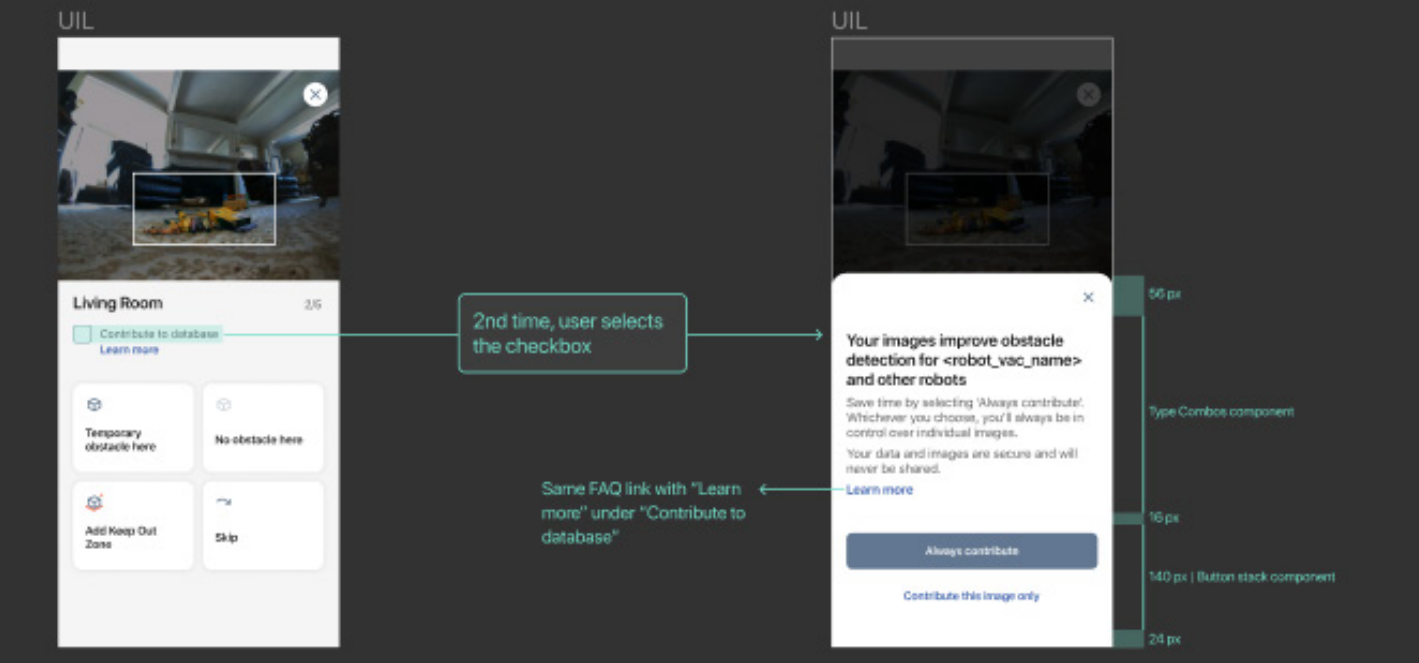
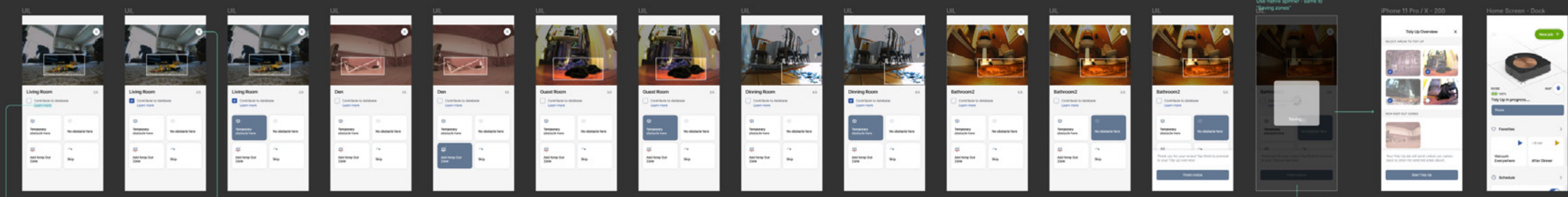


Image Detection





LESSONS LEARNED

The launch of the new Roomba robot that can both mop and vacuum was a major success for the company. By conducting thorough market research, developing a high-quality product, and executing a well-planned launch strategy, the company was able to meet the needs of its target market and exceed expectations. The new Roomba robot is now a top contender in the robotic vacuum and mop market and has positioned the company for continued growth in the future.

Moving forward, the company should continue to conduct market research to stay up to date on consumer needs and trends.

- \$&!@ HAPPENS
- BEWARE OF TOXIC USER CENTRICITY. WHAT YOU THINK IS EASY, IS NOT ALWAYS THE CASE.
- COMPLICATED CAN BE SIMPLE
- PEOPLE KNOW WHAT THEY WANT.
- DESIGN FOR THE USER AND NOT FOR YOURSELF.

- USE CASE -

REIMAGINE THE
EDUCATOR **EXPERIENCE**

USE CASE #3

REIMAGINE THE EDUCATOR EXPERIENCE

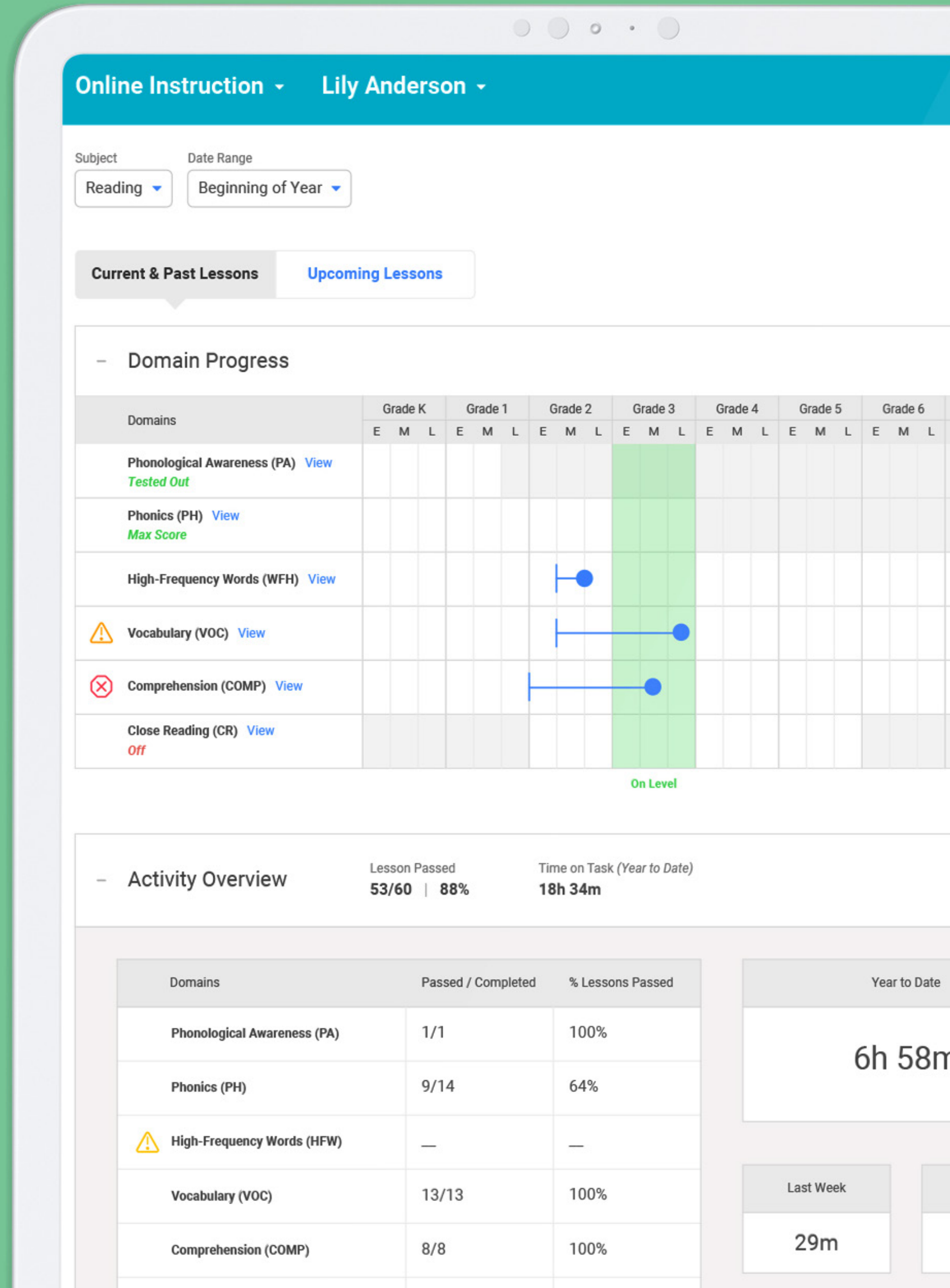
Curriculum Associates has been a key player in the education realm for many years and, like Bottomline, saw an opportunity to improve their technology platform and overall experience for their users.

CA wanted to devote the proper time and resources to define a desired scope that would not only benefit them financially, but would involve the end-users from the beginning.

Initial Steps

Before the first mouse click in AXURE was made, UX work was done.

- National school visits to observe classrooms and product use
- Design thinking sessions with educators to define problems
- Whiteboard sessions and journey mapping
- Persona creation
- Story and Backlog definitions
- Of course, lots more....



Class Profile

Academic year:
Select Students
Class: Tran 021

On Level (Mid/Late) or Above
< 1 Level Below

Overall Scale Score

Vo, Alina	On Level
Shishido, Naomi	On Level
Hawkes, Sara	On Level
Kha, David	< 1 Level Below
Santos, Laneyia	< 1 Level Below
Sanchez Torres, Jonathan	< 1 Level Below
Tinoco Serrano, Amy	< 1 Level Below
Cortez, Brianna	< 1 Level Below

Diagnostic Status

CLASS: **Math Class A** DATE RANGE: **Beginning of Year**

ALL STUDENTS
22
2 Unassigned

NOT STARTED
2

Showing (22 of 22)

Alerts Student Name Status

	KIMBALL, EMERSON	Unassigned
	SMITH, MICHAEL	Unassigned
	CAMERON, LISA	
	WELCH, REBECCA	
	BELL, DEIDRE	
+ 3d	ANDERSON, LILY	
	MORGAN, BERNADETTE	
	RAMPLING, JOSHUA	
	BURGESS, JUSTIN	

Class: **Math Class A** Date Range: **Beginning of Year**

Diagnostic Status

Testing Window: **Beginning of Year**
09/01/17 – 09/29/17 – [View testing time restrictions](#)

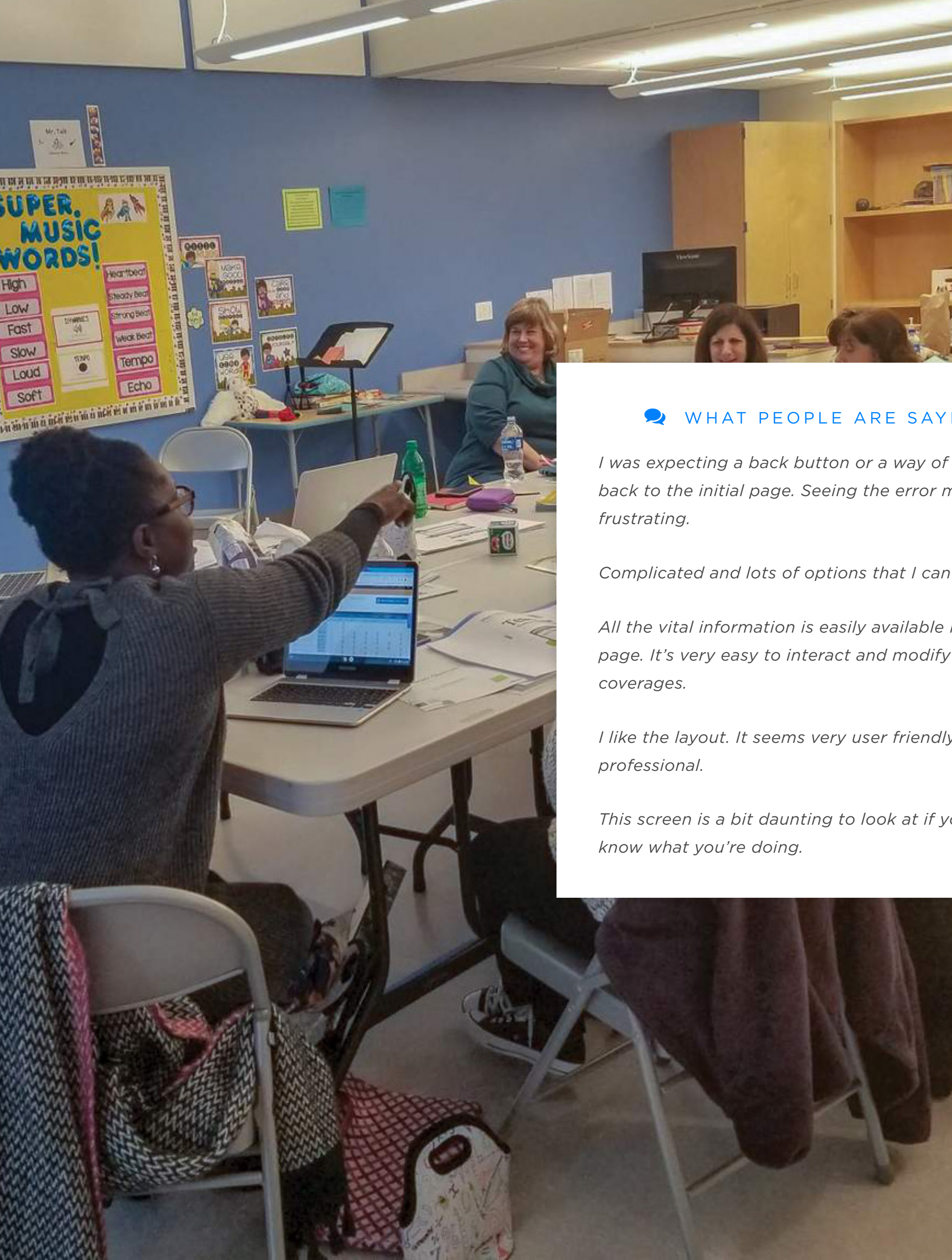
22 All Students
2 Unassigned

2 Not Started

Showing All Students (22 of 22)

Alerts Student Name Status

	Kimball, Emerson	Unassigned
	Smith, Michael	Unassigned
	Cameron, Lisa	
	Welch, Rebecca	
	Bell, Deidre	
+ 3d	Anderson, Lily	
	Morgan, Bernadette	
	Rampling, Joshua	
	Burgess, Justin	



REIMAGINE THE EDUCATOR EXPERIENCE

WHAT PEOPLE ARE SAYING:

I was expecting a back button or a way of getting back to the initial page. Seeing the error message is frustrating.

Complicated and lots of options that I can change.

All the vital information is easily available in a single page. It's very easy to interact and modify different coverages.

I like the layout. It seems very user friendly. It very professional.

This screen is a bit daunting to look at if you don't know what you're doing.

Challenges

With a data-driven user interface, the largest challenge was the constant need to simplify complex data structures in a way that all of our users could understand.

User-focused Design

During this process, we were extremely fortunate to have a large pool of educators from diverse backgrounds and roles to choose from.

This constant connection with the end user allowed us to stay on course and have the constant “gut check” to ensure we were answering the user needs and priorities. We were able to stay ahead of the process as well and help guide the ship to our final destination.

Online Instruction Reading Class A Current Week Tuesday September 24, 2017 CURRENT ALERTS Multiple Failures: 3 Domain Shutoffs: 3

INSTRUCTION

TIME ON TASK

September 6, 2017 - September 11, 2017

30m average

LESSONS PASSED (Year to Date)

Domain	# Students in Domain	% Lessons Passed
PA	4	95%
PH	2	67%
VOC	3	42%
LIT	4	80%
HPW	4	100%
CR	3	75%

TABLE VIEW: Current Week

Showing 20 Students

Alerts	Student Name	Time on Task	In Progress	Lessons Passed			Lessons Passed (YTD)	
				Passed	Completed	Rate	All Domains	%
+	ANDERSON, LILY	34m	1	2	2	100%	16/30	53%
+	BAILEY, LAUREN	46m	1	1	2	50%	8/12	66%
	BELL, DEIDRE	22m	2	0	2	0%	17/20	85%
	BUCKLAND, SONIA	-	0	-	-	-	4/6	33%
	BURGESS, JUSTIN	36m	1	1	1	100%	32/35	91%
	CAMERON, LISA	17m	1	0	1	0%	8/18	44%
+	DUNCAN, DONNA	6m	1	-	-	-	5/6	83%
	DYER, GABRIELLE	28m	0	1	2	50%	12/24	50%
	GRAHAM, OLIVER	47m	1	2	2	100%	27/30	90%
	MANNING, TRACEY	22m	2	0	1	0%	6/25	24%
	MCLEAN, PHIL	54m	1	0	2	0%	21/28	75%
	METCALFE, PIPPA	36m	1	2	2	100%	17/20	85%
	MORGAN, BERNADETTE	13m	0	1	2	50%	4/6	66%
	MORGAN, NATHAN	19m	1	0	2	0%	32/35	85%
+	DUNCAN, DONNA	6m	1	-	-	-	5/6	83%
	DYER, GABRIELLE	28m	0	1	2	50%	12/24	50%
	GRAHAM, OLIVER	47m	1	2	2	100%	27/30	90%
	MANNING, TRACEY	22m	2	0	1	0%	6/25	24%
	MCLEAN, PHIL	54m	1	0	2	0%	21/28	75%
	METCALFE, PIPPA	36m	1	2	2	100%	17/20	85%
	MORGAN, BERNADETTE	13m	0	1	2	50%	4/6	66%

LOGO ROSTERS ASSESS & TEACH REPORTS HELP Regina Moore

Diagnostic Status

CLASS: Math Class A DATE RANGE: Beginning of Year Current Testing Window: Beginning of Year 09/01/17 - 09/29/17 7 days remaining [View testing time restrictions](#)

ALL STUDENTS

22

2 Unassigned

NOT STARTED

2

IN PROGRESS

8

2 Expiring Soon

COMPLETED

10

2 Flushed 2 Flushed

Showing 22 of 22

Alerts: Student Name Status Placement

	KIMBALL, EMERSON	Unassigned	-
	SMITH, MICHAEL	Unassigned	-
	CAMERON, LISA	Not Started	-
	WELCH, REBECCA	Not Started	-
	BELL, DEIDRE	13% in progress	-
+	ANDERSON, LILY	20% in progress	-
	MORGAN, BERNADETTE	36% in progress	-
	RAMPLING, JOSHUA	42% in progress	-
	BURGESS, JUSTIN	51% in progress	-
	GRAHAM, OLIVER	60% in progress	-
	PAYNE, JOSEPH	75% in progress	-
+	TAYLOR, JUSTIN	84% in progress	-
+	DUNCAN, DONNA	Completed 09/12/16	MID 2
+	MCLEAN, PHIL	Completed 09/10/16	MID 2
+	BAILEY, LAUREN	Completed 09/09/16	LEVEL 3
+	METCALFE, PIPPA	Completed 09/08/16	LEVEL 3
+	PULLMAN, MARIA	Completed 09/07/16	LATE 2
+	BUCKLAND, SONIA	Completed 09/07/16	LEVEL 3
	CAMERON, LISA	Not Started	-
	WELCH, REBECCA	Not Started	-
	BELL, DEIDRE	13% in progress	-
+	ANDERSON, LILY	20% in progress	-
	MORGAN, BERNADETTE	36% in progress	-

LOGO ROSTERS ASSESS & TEACH REPORTS HELP Regina Moore

Online Instruction

READING Year to Date August 26, 2016 - August 26, 2017

Current & Past Lessons Upcoming Lessons All Lessons

Domain Progress

Domains	Grade K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
Phonological Awareness (PA)	Tested Out								
Phonics (PH)									
High Frequency Words (HFW)	Tested Out								
Vocabulary (VOC)	Max Score								
Comprehension (COMP)									
Close Reading (CR)	Tested Out								

ON LEVEL

Activity Overview

LESSONS PASSED (YTD) Passed/Completed: 30/35 Rate: 86% TIME ON TASK Year to Date: 6h 58m

Domain Lessons Passed

Domains	Passed/Completed	Rate
Phonological Awareness (PA)	1/1	100%
Phonics (PH)	9/14	64%
High Frequency Words (HFW)	-	-
Vocabulary (VOC)	13/13	100%
Comprehension (COMP)	8/8	100%
Close Reading (CR)	-	-

Time On Task

Year To Date: **6h 58m**

Last Week: **29m** Current Week: **32m**

TABLE VIEW: Year to Date

Showing 6 of 6 Results

Alerts	Domains	Level	Lesson	Pass/Fail	Score	Time on Task	Started	Finished
	VOC	Early 1	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	-	-	24m	09/26/17	In Progress
+	PH	Early 1	Aenean eu leo quam. Pellentesque	Fail	65%	32m	09/26/17	09/26/17
+	VOC	Mid 1	Ornare sem lacina quam venenatis vestibulum.	Fail	68%	18m	09/26/17	09/26/17
	VOC	Mid 1	>Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Pass	95%	27m	09/26/17	09/26/17
	PH	Late 1	Aenean eu leo quam. Pellentesque	Pass	100%	21m	09/26/17	09/26/17
+	VOC	Mid 1	Ornare sem lacina quam venenatis vestibulum.	Fail	68%	18m	09/26/17	09/26/17

i-Ready Florida Regina Moore

Dashboard Students **Reports** Plan & Teach Help

Class: **Math Class A** Date Range: **Beginning of Year**

Instructional Usage

Current Alerts: ✖ Multiple Failures: 3 ⚠ Domain Shortfalls: 3

Pass Rates (Year to Date)

Time on Task: 09/06/17 - 09/11/17 Time Period: **Current Week**

20 All Students

Alerts	Student Name	Time on Task	Lessons In Progress	Lessons Passed			Lessons Passed (YTD)	Rate
				Passed	Completed	Rate		
+ ✖	Anderson, Lily	34 Min	1	2	2	100%	16/30	53%
+ ⚠	Bailey, Lauren	46 Min	1	1	2	50%	8/12	66%
	Bell, Deidre	22 Min	2	0	2	0%	17/20	85%
	Buckland, Sonia	-	0	-	-	-	4/6	33%
	Burgess, Justin	36 Min	1	1	1	100%	32/35	91%
	Cameron, Lisa	17 Min	1	0	1	0%	8/18	44%
+ ⚠ ✖	Duncan, Donna	6 Min	1	-	-	-	5/6	83%
	Dyer, Gabrielle	28 Min	0	1	2	50%	12/24	50%
	Graham, Oliver	47 Min	1	2	2	100%	27/30	90%
	Manning, Tracey	22 Min	2	0	1	0%	6/25	24%
	McClean, Phil	54 Min	1	0	2	0%	21/28	75%
	Metcalf, Pippa	36 Min	1	2	2	100%	17/20	53%

i-Ready Florida Regina Moore

Dashboard Students **Reports** Plan & Teach Help

Class: **Math Class A** Date Range: **Beginning of Year**

Diagnostic Status

Testing Window: **Beginning of Year**
09/01/17 - 09/29/17 - View testing time restrictions

Next Steps: [Run Class Profile](#), [Run Instructional Grouping Profile](#)

22 All Students 2 Not Started 8 In Progress 2 Expiring Soon 10 Completed 2 Rushed 2 Rushed

Showing All Students (22 of 22)

Alerts Student Name Status Placement

	Kimball, Emerson	Unassigned	-
	Smith, Michael	Unassigned	-
	Cameron, Lisa	Not Started	-
	Welch, Rebecca	Not Started	-
	Bell, Deidre	13% in progress	-
+ ⚠ 3d	Anderson, Lily	20% in progress	-
	Morgan, Bernadette	36% in progress	-
	Rampling, Joshua	42% in progress	-
	Burgess, Justin	51% in progress	-
	Graham, Oliver	60% in progress	-
	Payne, Joseph	75% in progress	-
+ ⚠ 2d	Taylor, Justin	84% in progress	-
+ ⚠	Duncan, Donna	Completed 09/04/16	Mid 2
+ ⚠	McClean, Phil	Completed 09/06/16	Mid 2
	Bailey, Lauren	Completed 09/04/16	Level 3
+ ⚠	Metcalf, Pippa	Completed 09/04/16	Level 3

i-Ready Florida Regina Moore

Dashboard Students **Reports** Plan & Teach Help

Online Instruction - **Lily Anderson**

Subject: **Reading** Date Range: **Beginning of Year**

Current & Past Lessons Upcoming Lessons

Domain Progress

Domains	Grade K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
	E M L E M L E M L E M L E M L E M L E M L E M L								
Phonological Awareness (PA) Tested Out									
Phonics (PH) Max Score									
High-Frequency Words (HFW) View									
Vocabulary (VOC) ⚠ View									
Comprehension (COMP) ✖ View									
Close Reading (CR) Off View									

On Level

Activity Overview

Lesson Passed: 53/60 | 88% Time on Task (Year to Date): 18h 34m

Domains	Passed / Completed	% Lessons Passed
Phonological Awareness (PA)	1/1	100%
Phonics (PH)	9/14	64%
High-Frequency Words (HFW)	-	-
Vocabulary (VOC)	13/13	100%
Comprehension (COMP)	8/8	100%
Close Reading (CR)	-	-

Year to Date: **6h 58m**

Last Week: 29m Current Week: 32m

Showing 60 of 60

Alerts Domains Level Lesson Passed Score Time on Task Started Finished

REIMAGINE THE EDUCATOR EXPERIENCE

Welcome to i-Ready!

We have completely redesigned the *i-Ready* experience. We've made it simple and intuitive to get insights and take actions to support your teachers and students. These changes are all based on the feedback we've received from educators like you.

Are you ready to learn more?

You can always restart this tour by selecting "Onboarding Tour" from the question mark on your dashboard.

[Explore on My Own](#)

[Give Me a Tour](#)

LESSONS LEARNED

- THERE IS NEVER ENOUGH TIME TO DO EVERYTHING.
- FAIL EARLY AND OFTEN.
- WHAT YOU THINK IS EASY, IS NOT ALWAYS THE CASE.
- COMPLICATED CAN BE SIMPLE
- PEOPLE KNOW WHAT THEY WANT.
- DESIGN FOR THE USER AND NOT FOR YOURSELF.



THANK YOU!

- APPENDIX -

SOME **ADDITIONAL**
WORK EXAMPLES

WORK & PROCESS

SIMPLIFYING THE SELECTION PROCESS

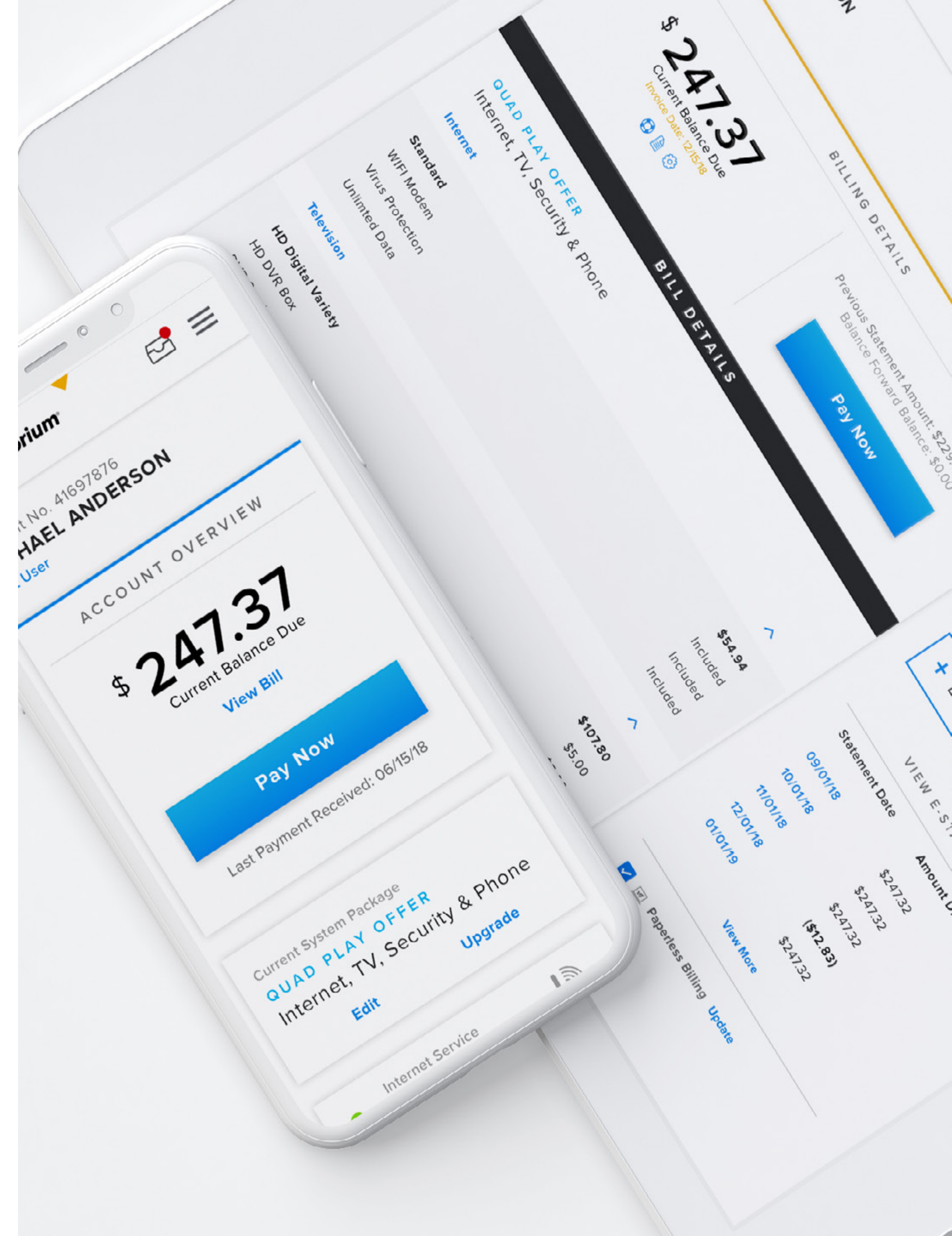
Opportunity

Comporium is a small fish in a big pond of phone and internet providers when you compare them to their competition (Xfinity, Verizon, AT&T). However, in order to be able to compete in their market, they needed to upgrade their ordering system so users could self checkout without the need to call.

This is where I came in. I worked with their team and my development partner to rethink their current process. What we came up with has improved productivity in their customer service department and greatly increased sales.

What was done

- Competitive Analysis
- Stakeholder Interviews
- User Interviews
- Persona development
- Wireframe and prototyping
- Updated design system
- New user workflows for rest of online presence
- Modernized web layout
- Fully accessible site
- Integrated E-commerce



Internet, TV, Security & Phone.

Bundle Plans

Individual Plans

Bundle and save with our great selection! Choose from bundles including Internet, TV, Security and/or Home Phone.

*** Bundle availability may differ in certain areas. ***

I'm looking for:

Internet

TV

Security

Phone

2X

DOUBLE PLAY OFFER
Basic Internet & TV

Special Introductory Offer starting at

\$59.99/mo
for the a 12 months

OVER \$350 IN SAVINGS

Maecenas faucibus mollis interdum. Duis mollis, est non commodo luctus, nisi erat porttitor ligula.

[Hide Details](#)

2X

DOUBLE PLAY OFFER
Basic Internet & TV

Special Introductory Offer starting at

\$69.99/mo
for the a 12 months

OVER \$350 IN SAVINGS

Maecenas faucibus mollis interdum. Duis mollis, est non commodo luctus, nisi erat porttitor ligula.

[View Details](#)

[Add to cart](#)

Add to compare

3X

TRIPLE PLAY OFFER
Basic Internet & TV

Special Introductory Offer starting at

\$139.99/mo
for the a 12 months

OVER \$350 IN SAVINGS

Maecenas faucibus mollis interdum. Duis mollis, est non commodo luctus, nisi erat porttitor ligula.

[View Details](#)

[Add to cart](#)

Add to compare

up to **75** mbps

INTERNET
Standard High Speed Internet
Download speeds up to 75 Mbps
Modem or Router included

100+ HD Channels

TELEVISION
100+ HD Channels
Whole Home DVR w/TV on demand
Watch when and where you want

[Add to cart](#)

Add to compare

3X

TRIPLE PLAY OFFER
Ultra Internet, TV & Phone

Special Introductory Offer starting at

\$109.99/mo
for the a 12 months

OVER \$350 IN SAVINGS

4X

QUAD PLAY OFFER
Internet, TV, Security & Phone

Special Introductory Offer starting at

\$149.99/mo
for the a 12 months

OVER \$350 IN SAVINGS

Account No. 41697876

MICHAEL ANDERSON

[Edit User](#)

BILLING DETAILS

\$247.37

Current Balance Due

Invoice Date: 12/15/18

[+](#) [-](#) [↻](#)

Previous Statement Amount: \$229.99 (paid)
Balance Forward Balance: \$0.00

[Pay Now](#)

BILL DETAILS

QUAD PLAY OFFER

Internet, TV, Security & Phone

Internet

Standard	\$54.94
WiFi Modem	Included
Virus Protection	Included
Unlimited Data	Included

Television

HD Digital Variety	\$107.80
HD DVR Box	\$5.00
DVR Service	\$5.00

Security

Phone

Monthly Charges \$279.99

Monthly Taxes/Fees \$17.33

Bundle Savings **-\$50.00**

Total Monthly Charges \$247.37

[Pay Now](#)

You are enrolled in Autopay. Your account will be charged: 01/17/19
[Change Settings](#)

Internet Service Connected

[+ Add/Update Service](#)

[+ Edit My Settings](#)

VIEW E-STATEMENTS

Statement Date	Amount Due
09/01/18	\$247.32
10/01/18	\$247.32
11/01/18	\$247.32
12/01/18	(\$12.83)
01/01/19	\$247.32

[View More](#)

Paperless Billing [Update](#)

Account No. 41697876

MICHAEL ANDERSON

[Edit User](#)

ACCOUNT OVERVIEW

\$247.37

Current Balance Due

[View Bill](#)

[Pay Now](#)

Last Payment Received: 06/15/18

Current System Package

QUAD PLAY OFFER

Internet, TV, Security & Phone

[Edit](#)

[Upgrade](#)

Internet Service Connected



Paperless Billing



Autopay

WORK & PROCESS

ALIGNING DESIGN WITH IDEALS

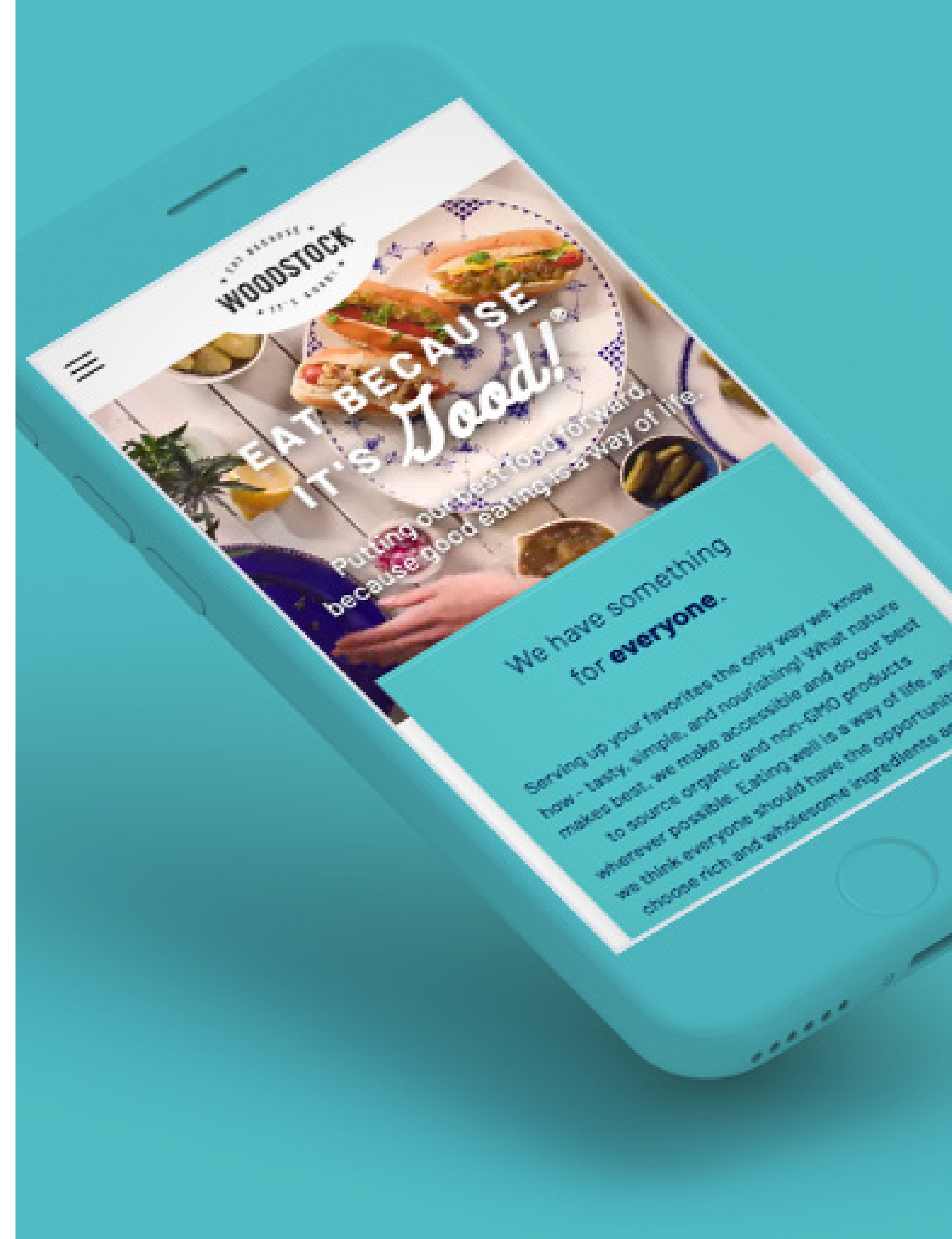
Opportunity

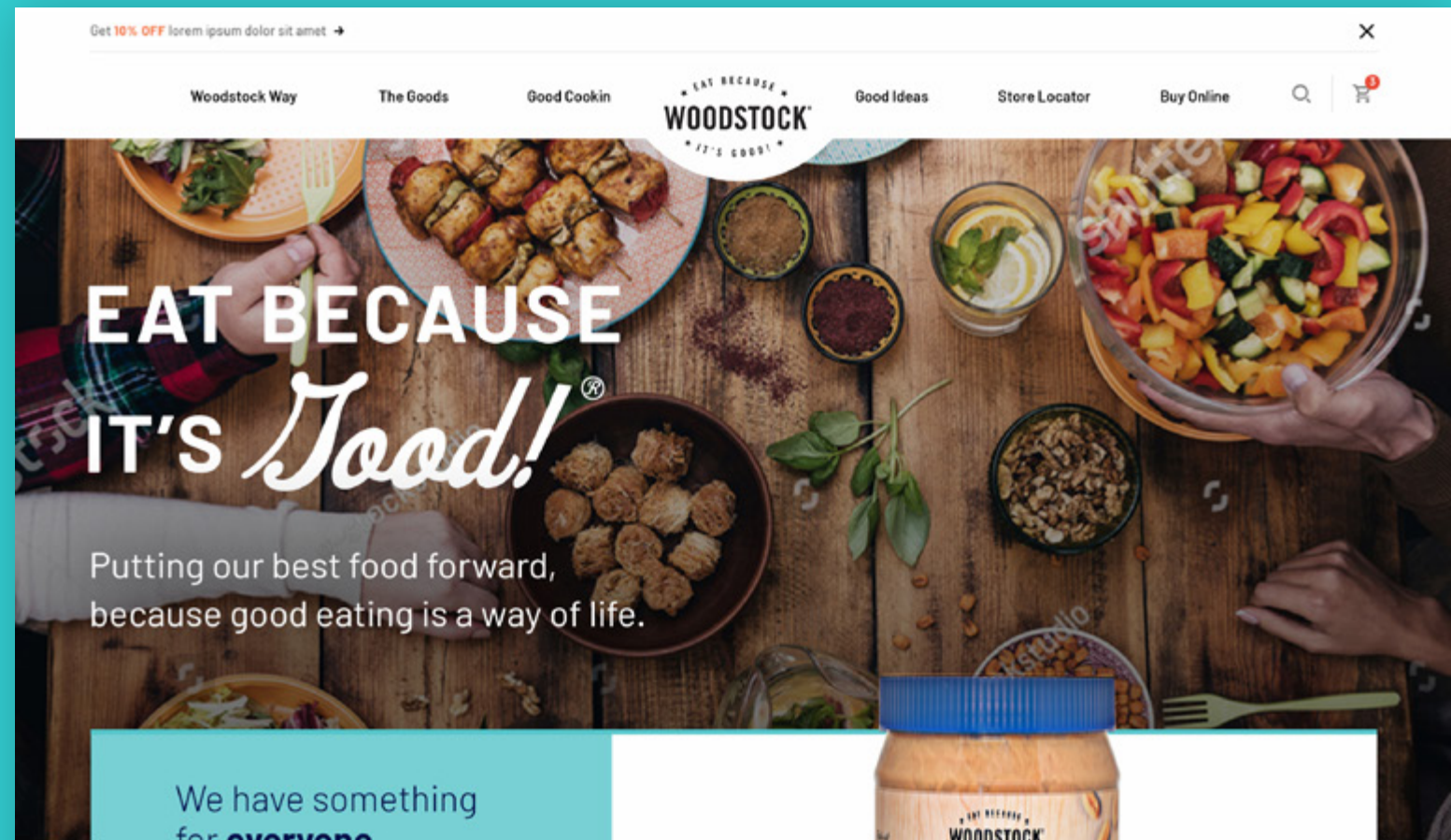
A leader in organic and natural grocers, Woodstock Foods lacked an online presence and design system that did justice to their cult following.

Woodstock reached out to my through a referral looking for help. This was my first project with my own agency, so this one is near and dear to my heart. Anyways, Woodstock needed help visualizing their overall message of “Eat Because It’s Good.” They had a large social media following, but no where to expand and tell their story or allow people to find or even purchase online.

What was done

- Competitive Analysis
- Stakeholder Interviews
- User Poll/Survey
- Full research report and breakdown
- Persona development
- Wireframe and prototyping
- Updated design system
- Updated story and copy
- Modernized web layout
- Fully accessible site
- Integrated E-commerce





We have something for **everyone**

Serving up your favorites the only way we know how - tasty, simple, and nourishing! What nature makes best, we make accessible and do our best to source organic and non-GMO products wherever possible. Eating well is a way of life, and we think everyone should have the opportunity to choose rich and wholesome ingredients and we are proud to serve the foodie in you.

[The Goods](#)

ORGANIC SMOOTH PEANUT BUTTER

Sent vulputate sem in nunc sollicitudin rutrum. Aliquam luctus purus a malesuada posuere.

[Learn more](#)

Featured Categories

Check out what's new, what's delicious, and what's trending

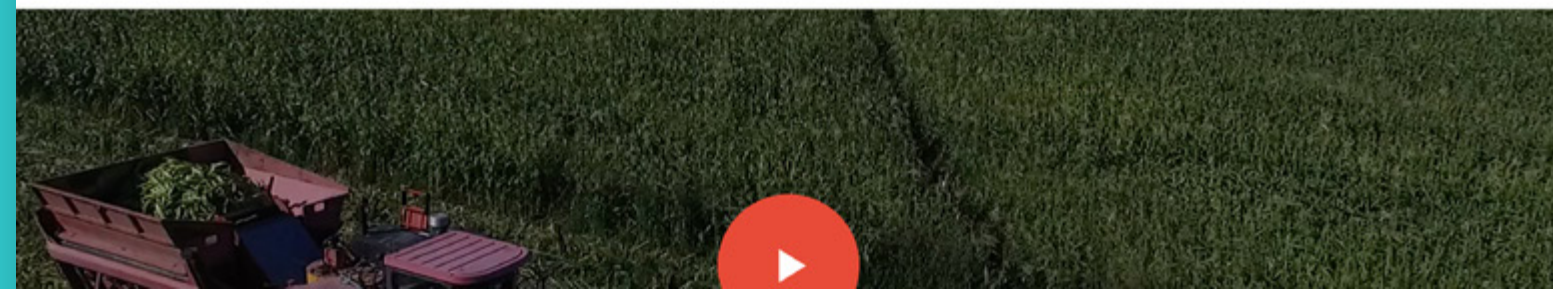
JUST NUTS

FROZEN FRUITS

HOT CEREALS

Sent vulputate sem in nunc sollicitudin rutrum. Aliquam luctus purus a malesuada.

[See all products](#)



Woodstock Way The Goods Good Cookin **WOODSTOCK** Good Ideas Store Locator Buy Online

TAKE ME HOME Tonight

Featured Items

Organic Value Frozen Fruit

WOODSTOCK Organic Frozen Fruit New Value Size - **more is more!** Your favorite organic frozen fruit is now available in a convenient family-friendly size.

[Buy Now](#)

35oz Organic Easy Spread Peanut Butter, Smooth

Made from the simplest ingredients, our Easy Spread Organic Peanut Butter is the perfect accompaniment to your favorite sandwich, smoothie.

[View Product](#)

Products

All New Featured Popular

Try searching here...

Category

- Category 1
- Category 1
- Category 1
- Category 1
- Category 1

[See All](#)

Additional Filters

- Buy Online
- Bulk Options

Price Range (USD)

- 0-5
- 5-10
- 11-20
- 21+

[Add to Cart](#)

Smooth Cashew Butter - Unsalted

Non-GMO Tamar Almonds

Organic Pine Nuts

Organic Pumpkin Seeds

Organic Smooth Peanut Butter - Unsalted

Organic Raw Almonds

Organic Irish-Style Oatmeal

Organic Yellow Mustard

Organic Banana Chips - Sweetened

[Load More](#)

Hey Good Cookin

Woodstock Way The Goods Why It's Good **WOODSTOCK** Community Make Great More Goodness

Smooth Cashew Butter - Unsalted

About Ingredients & Allergens **Nutritional Info**

Smooth Like Butter

[Buy Now](#) [Find a Retailer](#)

100% QUALITY 100% ORGANIC 100% NATURAL 100% GMO FREE

This oatmeal is **by far the best**. Vestibulum id ligula porta felis euismod semper. Donec id elit non mi porta gravida at eget metus lorem ipsum.

Luna Lovegood



Oatmeal Biscuits

Serves 12

LEVEL	TIME	RATING
Medium	45 min	8/10

INGREDIENTS

- 75g (3 oz) self raising flour
- 75g (3 oz) porridge oats
- 75g (3 oz) sugar
- 75g (3 oz) butter
- 1 tablespoon golden syrup
- 1 tablespoon milk

DIRECTIONS

- Preheat oven to 180 C / Gas mark 4. Line a baking tray with baking parchment.
- Sift the flour into a bowl. Mix in rolled oats and sugar.
- Melt butter, syrup and milk in a saucepan and stir until heated through. Add to the premixed dry ingredients. Mix until well combined. Spoon onto a baking tray and shape into rounds.
- Bake in preheated oven for 10 to 15 minutes, or until golden brown. Leave to cool for 5 minutes before removing from tray.

STAKEHOLDER INTERVIEWS

WOODSTOCK FOODS E-COMMERCE SITE

ESTABLISHING THE GOALS

What are some expectations and perception around the current product?

[View Research Doc](#)

INSIGHT 002

Woodstock is the sum of its ingredients

Shifting consumer desires means they're looking more at what's in the products they buy and less at the Nutrition Panel. They care what you, and your products are literally made of.

"Our consumer wants minimum ingredients, and they want them to be recognizably natural."

"We need to expand the education and value around the ingredients of our products."

"Our social followers, Instagram in particular, seek out our website to learn about ingredients."

"Ingredients are most important!"

"I would really like to see ingredients front and center with our products."

USER INSIGHTS

EXPLORING THE WHO

Use surveys, polls, design thinking sessions, and interviews to gain access to end-users.

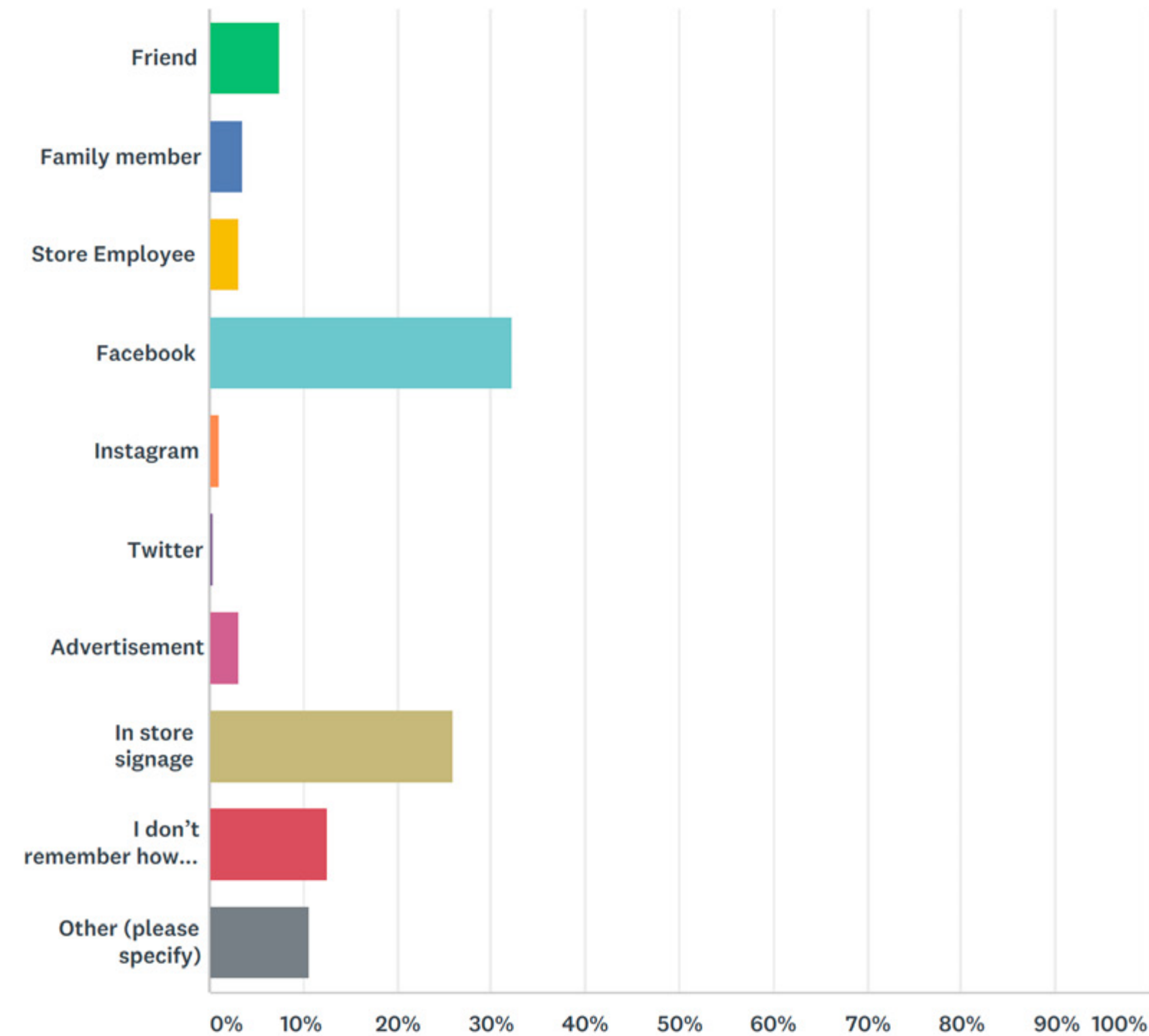
[View Poll Example](#)

*Surveyed 300 participants from social media base via Survey Monkey over a one-week period

Consumer Survey

Q2 How did you first learn about WOODSTOCK?

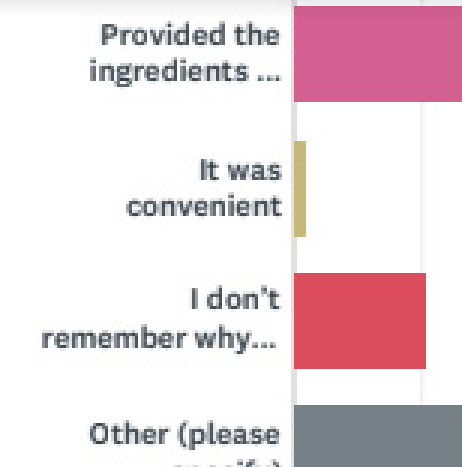
Answered: 289 Skipped: 2



Consumer Survey

Q3 Why did you make your first WOODSTOCK purchase?

Answered: 288 Skipped: 3



- APPENDIX -

HOW TO PUT RESEARCH FINDINGS INTO PRACTICE

WE KNOW THE WHAT AND THE WHY, NOW WE NEED THE HOW

EXAMPLE

USABILITY TESTING

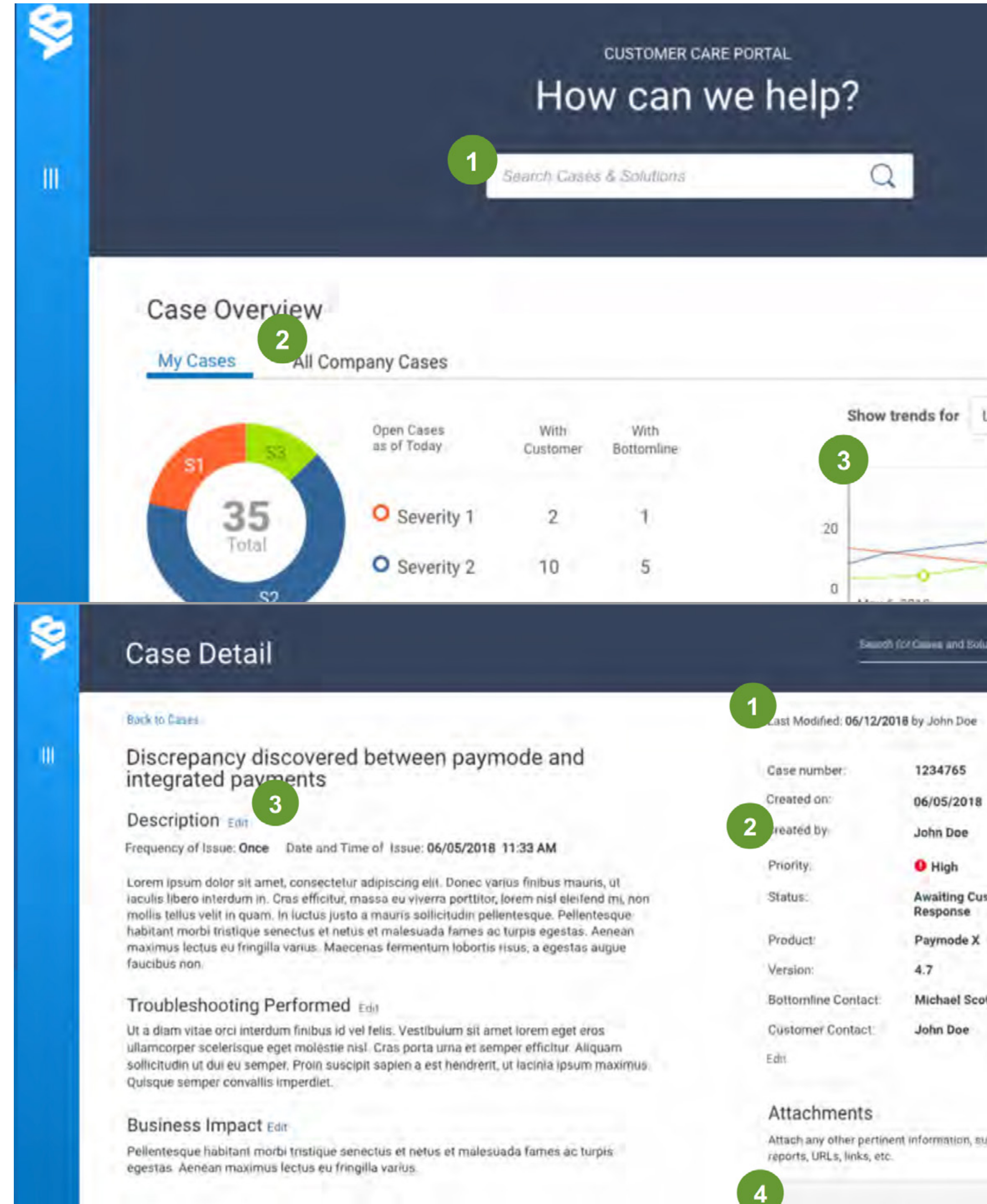
Goal

To validate the performance of the Customer Care Portal to find solutions for technical issues encountered by our users.

Areas of Focus

- DASHBOARD
- CASES
- RESULTS
- ADMIN
- NAVIGATION

[View Research Findings](#)



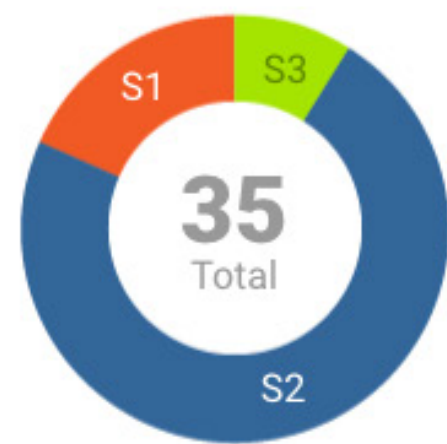
How can we help?

How can we help?

- Paymode-X
- Most Recent Case
- Product Release
- Password Reset

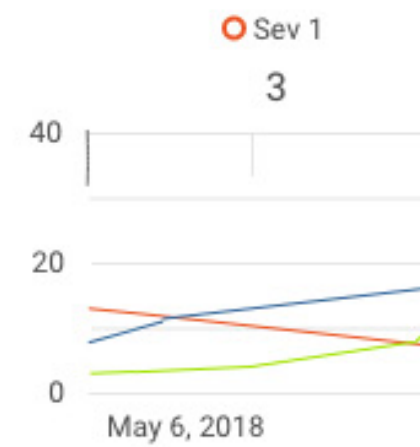
Case Overview

My Cases All Cases



Open Cases as of Today	With Customer	With Bottomline
Severity 1	2	1
Severity 2	10	5
Severity 3	8	9

Show trends for



Service Announcements

- Monitoring - A fix has been implemented and we are monitoring the issue. !
 - Update - We are seeing recovery for some of the affected products.
 - Resolved - All systems are operating normally.
- [View all 12 announcements](#) [Set notifications](#)

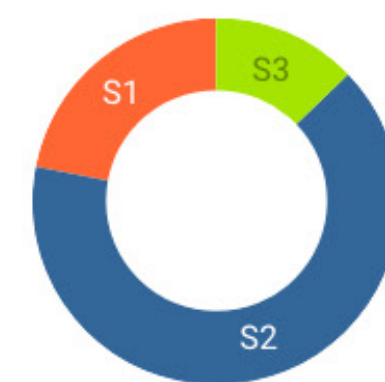
Product News

- Transform
- Paym
- Transform 5.3 Patch 20 is n
- Scheduled maintenance in p
- Transform 7.0 Patch 1 is no

Case Overview

My Cases All Company Cases

Open Cases as of Today



- Severity 1
- Severity 2
- Severity 3

Total Cases

35 Total

Requires Your Attention

2 Severity 1

10 Severity 2

8 Severity 3

In Progress With Bottomline

1 Severity 1

5 Severity 2

9 Severity 3

CASE NAME	NUMBER	SEVERITY	PRIORITY	STATUS	DATE OPENED	PRODUCT	VERSION
Aenean lacinia bibendum nulla sed consectetur	002318	Sev 1	High	Awaiting BT Response	05/17/2018	Paymode-X	3.2
Lorem ipsum dolor set amit	003451	Sev 1	Low	Customer Deferred	05/14/2018	Transform	7.0
Donec id elit non mi	010935	Sev 1	Normal	Customer Deferred	05/10/2018	Paymode-X	3.2
Porta gravida at eget metus	010947	Sev 1	Normal	Customer Response	05/08/2018	Paymode-X	3.2
Integer posuere erat a ante venenatis dapibus	010947	Sev 1	Normal	Customer Response	05/08/2018	Paymode-X	3.2

SPOT THE DIFFERENCES?

- Suggested search topics based on recent inquiries (machine learning)
- Extended data visualization
- Short cuts for priority items
- Case view grid
- Many More

Recent Announcements Product News

All (12)

Set e-mail notifications

RESOLVED- Service Interruption - oFlows and Online Account Opening- UAT/Staging Environment

June 8, 03:19 PDT | Platform: Bill Pay

Bottomline has been alerted to an issue with files not being able to be downloaded from our sFTP site for ACH's. Our technical resources are...

June 4, 08:26 PDT | Platform: File Movement for ACH

A LITTLE EXTRA

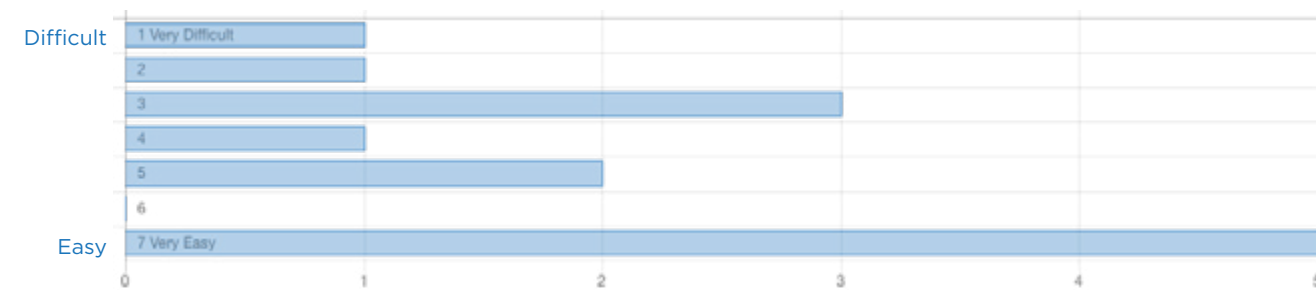
USER TESTING SAMPLE

QUESTIONS

A. What would you do first on this page?

- Choose Vehicle Coverage in Collision & Comprehension
- Play with slider and adjust coverages
- Click on discounts...how does that effect monthly costs
- Look at payments
- Update bodily injury and property damage liability (3)
- Call support
- Review all coverage information

How easy or difficult was it for you to accomplish this task?



WHAT PEOPLE ARE SAYING:

It's fairly simple to understand from the design of the page.

Since I am not familiar with insurance policies I felt personally little bit difficult but they have the coverage details as easy as to understand everyone.

I chose a low number because the updates for the policy took awhile to load and I was frozen out of continuing.

LIBERTY MUTUAL ONLINE QUOTING TOOL

How can we help you? ?

\$196 due today
Your premium is guaranteed for 12 months (\$228/Year) /month

Purchase Online

Need help or want to talk to a person?

Your Discounts: Vehicle Safety Discount Anti-Theft Device Discount Electronic Funds Transfer Discount [View all...](#)

Policy Coverages

Bodily Injury Liability

Coverage in the event that you are in an accident caused by an uninsured driver.

Your current selection: \$25,000/per person \$50,000/per accident

Property Damage Liability

Coverage in the event that you are in an accident caused by an uninsured driver.

Your current selection: \$10,000/per accident

Medical Payments

Coverage in the event that you are in an accident caused by an uninsured driver.

Your current selection: \$100,000/per person

Uninsured Motorist

Coverage in the event that you are in an accident caused by an uninsured driver.

Your current selection: \$25,000/per person \$50,000/per accident

Underinsured motorist

Coverage in the event that you are in an accident caused by an uninsured driver.

Your current selection:

[View all coverages...](#)

Vehicle Coverages:

2013 BMW X3 Hatchback
4-Door Hatchback

Comprehensive deductible
 I pay \$500 per incident

Collision deductible
 I pay \$100 per accident

- Better Car Replacement
- Employee Parking Guard
- Towing & Labor
- Glass Coverage
- Rental Car Reimbursement
- RightTrack:** Save up to 30%

[Help me decide...](#)

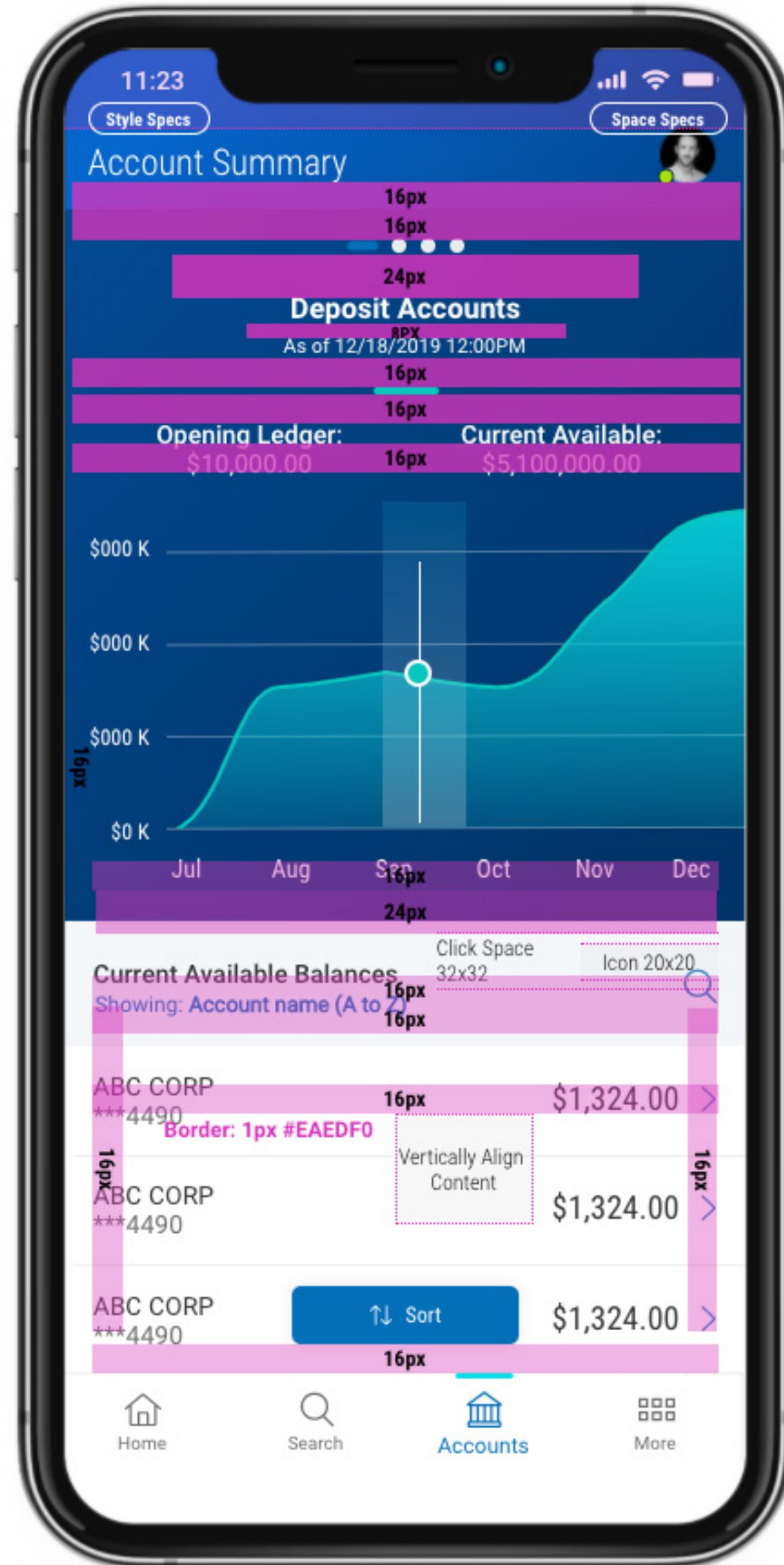
Features 7

Accident Forgiveness | New Car Replacement | Unlimited Rental ...

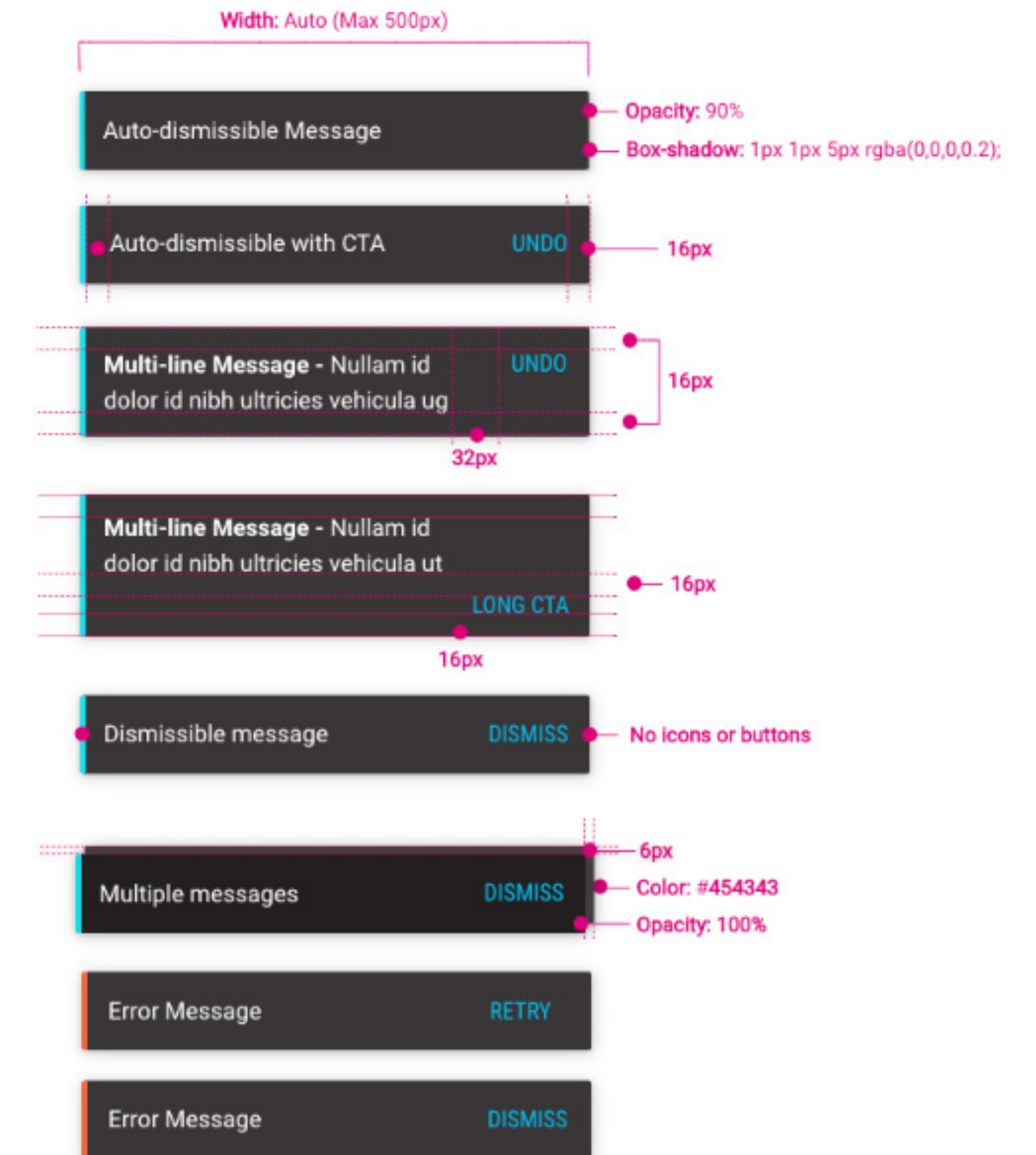
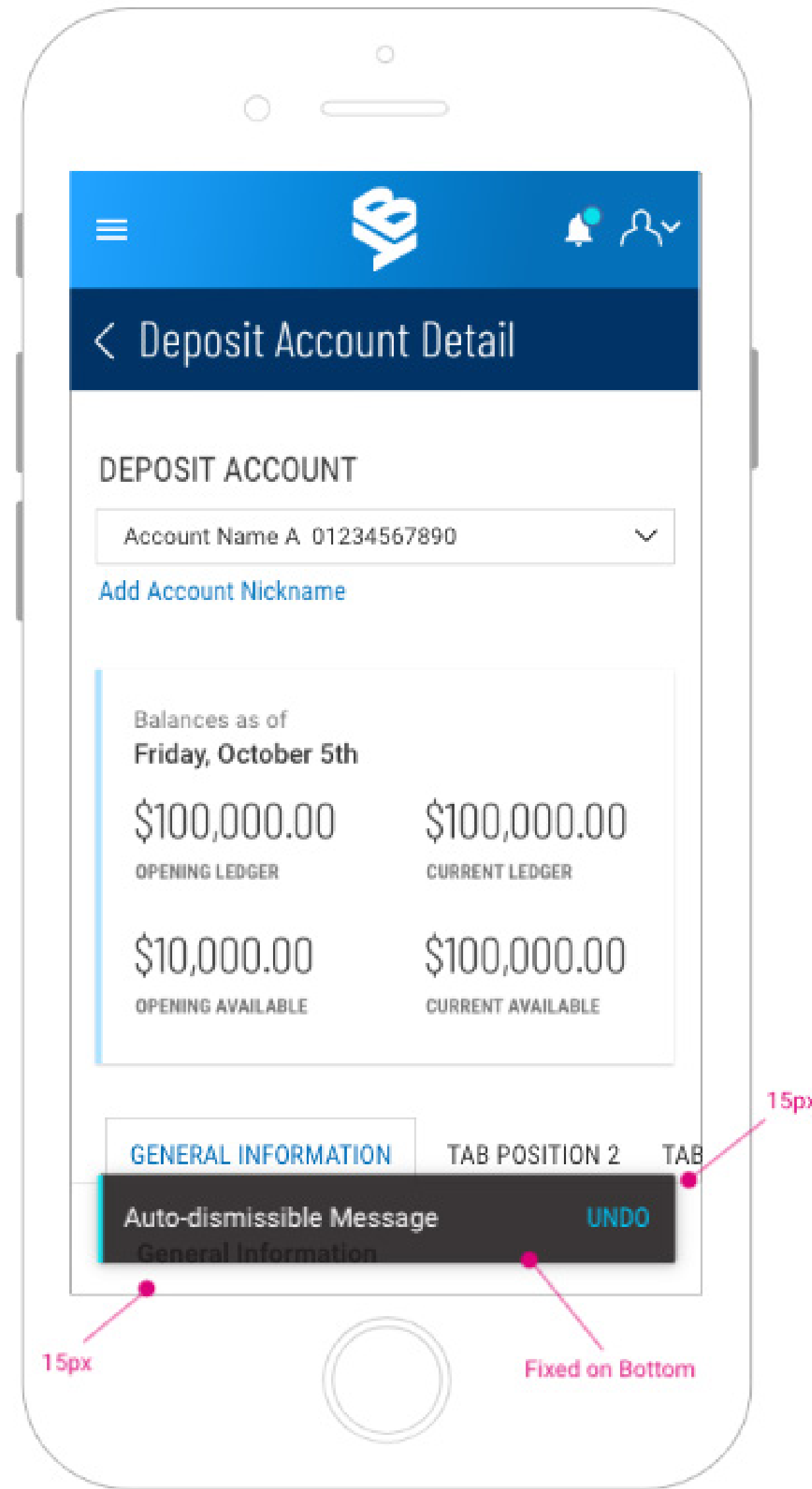
— APPENDIX —

PROVIDING GUIDANCE

STYLING INSTRUCTIONS



COMPONENT-LEVEL INSTRUCTIONS



INTERACTION INSTRUCTIONS

1

Payments

Initiate | Import Wire

DEFAULT VIEW | As of 00/00/0000 8:45 PM

ALL	ACTIONS	FROM ACCOUNT	ACCOUNT NAME	BENEFICIARY	AMOUNT	VALUE DATE	STATUS	PAYMENT TYPE
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	500.00	01/09/2018	Failed	Loan Payment
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	7,800.15	01/09/2018	Entered	Payroll Payment
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	481.24	01/09/2018	Entered	ACH Payment
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	753.14	01/09/2018	Entered	Loan Draw
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	154.42	01/09/2018	Entered	Loan Payment
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	1,881.43	01/09/2018	Approved	Loan Draw
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	45.90	01/09/2018	Approved	Loan Draw
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	860.04	01/09/2018	Approved	Loan Payment
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	310.43	01/09/2018	Deleted	Loan Draw
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	83.12	01/09/2018	Deleted	Loan Payment

6 Selected | Approve | Reject | Delete | Clear All

- Selecting rows activates the Action Bar that is "sticky" to the bottom of the page/widget. As items are selected, the count increases to display a sum total.
- Action buttons call to send selected rows to be initiated
- "Clear All" Removes selection and hides the Action Bar

2

Payments

Initiate | Import Wire

DEFAULT VIEW | As of 00/00/0000 8:45 PM

ALL	ACTIONS	FROM ACCOUNT	ACCOUNT NAME	BENEFICIARY	AMOUNT	VALUE DATE	STATUS	PAYMENT TYPE
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	500.00	01/09/2018	Failed	Loan Payment
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	7,800.15	01/09/2018	Entered	Payroll Payment
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	481.24	01/09/2018	Entered	ACH Payment
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	753.14	01/09/2018	Entered	Loan Draw
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	154.42	01/09/2018	Entered	Loan Payment
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	1,881.43	01/09/2018	Approved	Loan Draw
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	45.90	01/09/2018	Approved	Loan Draw
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	860.04	01/09/2018	Approved	Loan Payment
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	310.43	01/09/2018	Deleted	Loan Draw
<input checked="" type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	83.12	01/09/2018	Deleted	Loan Payment

6 Selected | 3/6 items will be Approved. Items in red are not eligible for Approval. | Continue | Cancel

- A validation of items selected will occur when an action button is selected
- Only in cases where an error occurs, the rows with errors will be highlighted red and an error message will appear in the Action Bar to give the user the ability to continue with the rows that do not have errors or to cancel and modify their selection.
- If no errors occur in the initial action, the original action will be sent and user will be presented with a success message (see next screen)

3

<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	310.43	01/09/2018	Deleted	Loan Draw
<input type="checkbox"/>	...	1122334451	Account ABC	ABC Corp	83.12	01/09/2018	Deleted	Loan Payment

4 Payments have been Approved

- When a bulk action is completed, the user will be presented with a success notification (snackbar) that will appear and auto-dismiss

A LITTLE EXTRA

ONLINE PROTOTYPES

WHAT YOU SAW TODAY

Digital Banking

[Alpha Release](#)

[Blue Sky](#)

[Demo Pages \(Desktop\)](#)

Curriculum Associates

[Teacher Dashboard Wires](#)

Comporium E-Commerce Wires

[Shop Experience \(AXURE\)](#)

[Comporium E-Commerce Designs](#)

[Comporium Mobile](#)

Woodstock

<https://invis.io/8JNDE4CB6XY>

EXTRA

[Quoin Website](#)

[Charles River Labs](#)

Mobile App

[Adjuster Tool \(PW: LM123!\)](#)

[Safeco \(HiFi\)](#)

Liberty Mutual

[Multi-Driver](#)

[User Form](#)

Testing

[Claims Scenarios](#)

*** More examples can be provided at any time ***