

Information Architecture

Artificial Intelligence

User Experience

User Research

Front End

Product

**Daniel Castellanos**

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Portfolio of work 2024

Design

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# Foreword

Throughout my career, I've embraced a rigorous design process that aligns with my scientific approach to problem-solving. I firmly believe that successful Human-Computer Interaction hinges on **data-backed visual solutions**. Subjectivity has no place in this equation; instead, we rely on objective metrics to evaluate design success.

Design thinking lies at the core of my approach. This mindset fostering creativity, empathy, and collaboration can be applied to any challenge; be it sales, product development, or growing tomatoes.

In this portfolio, you'll find evidence of my commitment to excellence—where data meets design, and where thoughtful questions lead to breakthroughs.

Thank you,

# User Research

## Vision Alignment

In the dynamic landscape of digital transformation, successful project kickoffs demand more than just technical expertise; they require a shared vision.

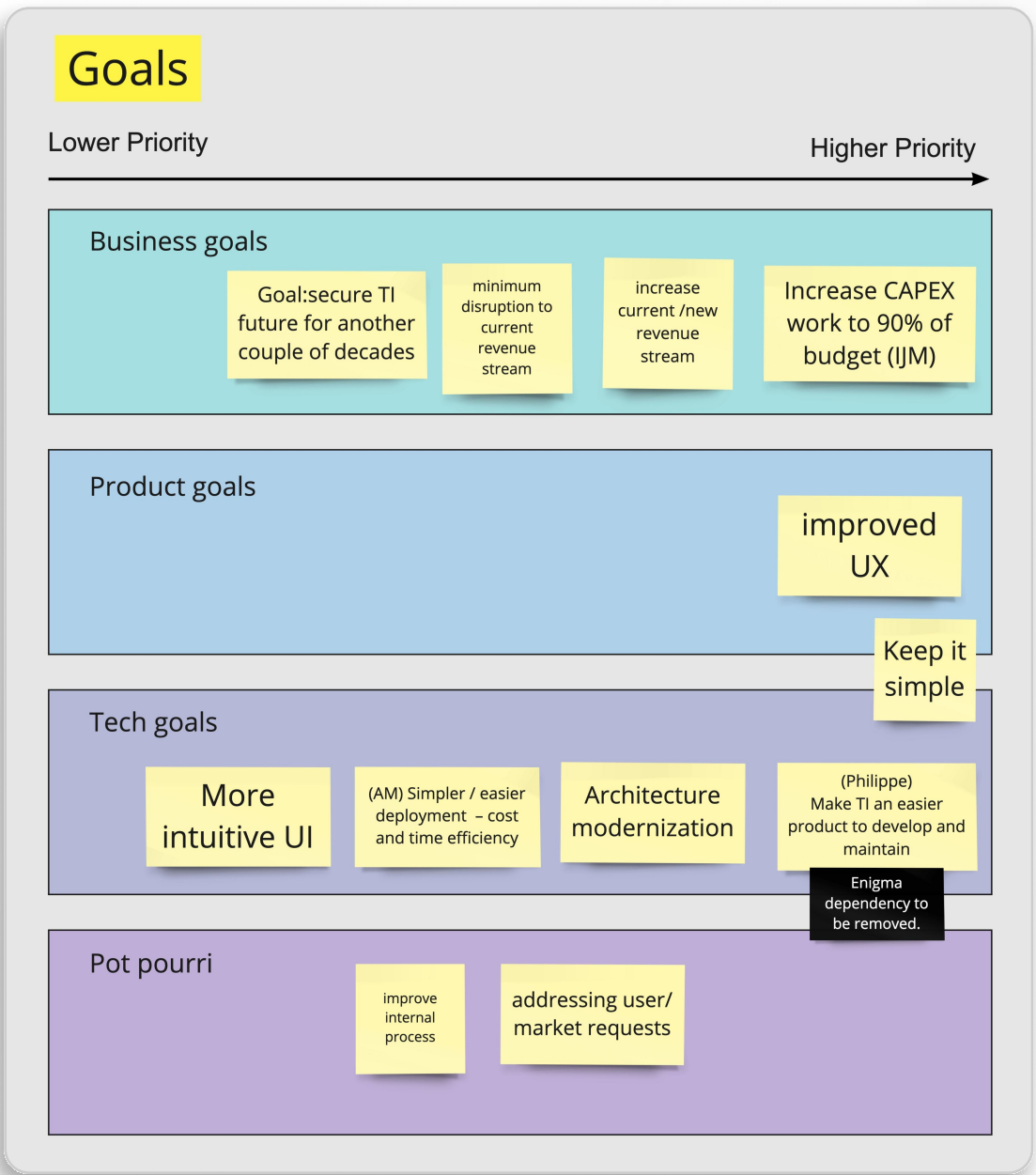
These collaborative whiteboard sessions bring together diverse stakeholders: product owners, client representatives, tech experts, developers, and more. Teams deliberate on topics such as project objectives, goals, risks, what success looks like, who the users are, what systems are used.

Fueled by collective creativity, we explore narratives: what stories will this project tell? How will it impact lives?

Ultimately the purpose of this is to produce a mission statement. We craft succinct, purpose-driven statements that resonate with the team. Mission statements aren't mere slogans; they're guiding stars throughout the project.

In one such workshop I lead at the Microsoft HQ in NYC, a premier insurance company executive shared the following testimonial:

*“You’ve accomplished in less than 2 hours what typically takes us 3 months to do.”*



### SUMMARY

***BY BRINGING ACCESSIBILITY INTO OUR DAILY PRACTICE, WE WILL LEVEL UP HOW WE DEVELOP PRODUCTS USING DATA BACKED SOLUTIONS. WE AIM TO REDUCE THE AMOUNT OF MAN-HOURS REQUIRED TO DELIVER CUSTOM SOLUTIONS, ACCOMPLISHING FASTER ONBOARDING FOR OUR USERS, AND A BETTER CLIENT EXPERIENCE. CREATING MULTI-DISCIPLINARY BEST PRACTICES INCLUDING ACCESSIBILITY & STANDARD PATTERNS WILL ATTRACT MORE CLIENTS.***

### GOALS

1. 6 month vision / Roadmap for the future.
2. Determine which Accessibility standard we are aiming for and what level of completion.
  - a. What does Microsoft expect?
3. How to manage accessibility work-stream.
4. Identify primary initiatives to solve (low hanging fruit)

### RISK

1. Having accessibility practices become a bottleneck.
2. Resourcing constraints.
3. Legacy technology may hinder accessibility implementation.
4. Open ended target / lack of clear industry expectations
  - a. What does Microsoft expect?
  - b. What do competitors do?
5. Organizational adoption.
  - a. Communications
  - b. Change management / oversight.
  - c. Teams don't take Accessibility seriously enough



# User Research

## User Interviews

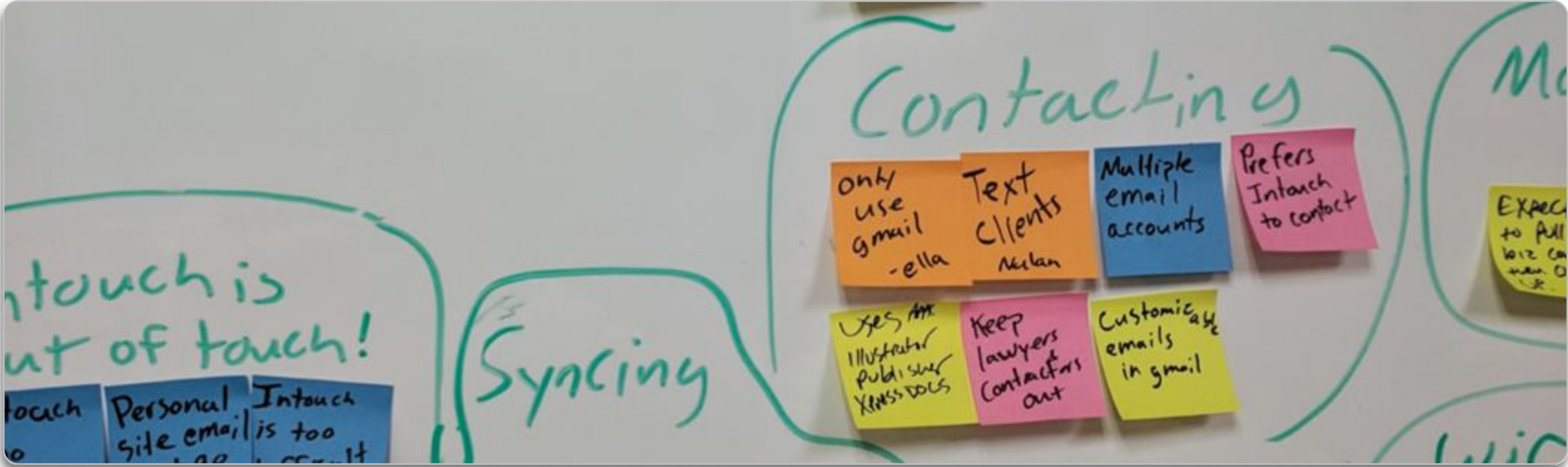
Candid conversations with real users are where the design magic happen. They provide a direct line to the heartbeat of our design process, users.

Since speed to market matters; I dive straight into understanding users’ needs. My User interviews follow a meticulously templated process.

This process allows my User Interviews to be done via quick guerilla marketing style, even leveraging internal team members. Stakeholders weigh in on the discussion guide, aligning business goals with user insights. This allows anybody on the team to pick up where we left off or understand historically what was done in this research endeavor..

The response data is eventually processed through exercises like the Affinity Cluster map shown. These artifacts and exercises guide design decisions by helping to differentiate between assumptions and reality.

*“Pretend I have a magic wand that can remove any pain points you have with this app....”*



**MetLife Sample Discussion Guide**  
**User Interviews Round 1**

**Overview**  
The following plan outlines the approach for obtaining user feedback and understanding how users manage their clients’ contacts in REIOS and MSAS.

**Our Goals & Key Questions**  
The following goals briefly outline our key objectives and what we are looking to learn from conducting user research.

**Research goals**

1. Understand the initial process agents follow when first using REIOS.
2. Discover if and how agents curate their contact list and how they use contact groups in REIOS.
3. Shed light on any difficulties that agents may experience in managing their contacts in any other format they use to record client contact information.

**User Interviews**  
In order to achieve our research goals, we will be conducting user interviews to learn about user behavior and needs. User interviews will be casual and outlined by a discussion guide, meant to foster conversation and prompt users. (Discussion Guide is found at the end of this document)

**Team**  
User interviews are led by a trained moderator and should also be attended by any team members who can be available. All sessions will be recorded, but attendance is strongly recommended.

**Tools:** User interviews will be conducted and recorded via Microsoft Teams  
**Time:** Sessions/interviews will be scheduled for 60 minutes  
**Dates:** User interviews will be conducted between 7/15/23 – 7/19/23.

**Who will we talk with?**  
Users should **span across different locations and markets** as well as **different levels of familiarity with REIOS**. By interviewing across these characteristics, we will be able to gain a more rounded view of feedback and assess global insights and patterns.

**Research Discussion Guide**  
This script will serve as a guideline for conversation between the users and the moderator. Additional questions may be asked, or we may dive deeper into certain areas, based on user response.

**Introduction (5 minutes)**

Hi \_\_\_\_\_, thank you for your time today. My name is \_\_\_\_\_ and I'll be working with you during this session. \_\_\_\_\_ is also here to listen in, take notes, and ask any additional questions that I may not address.

**Interview Purpose:** Today we'll be talking to you about your experience using Intouch and REIOS and managing your client's contact info.

Before we begin, there's a few things that I would like to go over with you:

1. **Recording/Observing:** We'll be recording today's session so that we are able to refer back to it later to listen and take additional notes. Your name and image will not be associated with the data and will only be shared internally within the Realogy team.
2. **Addressing Questions:** If you have any questions during our discussion, just ask. I may not answer your question directly but may instead redirect the question back to you. This is just because we really want to hear YOUR thoughts and insights. I'm also happy to address any additional questions after the session.
3. **No Wrong Answers:** Lastly, I want to make it clear that there are no wrong answers. We are not testing you in any way and there is no such thing as a stupid answer, we're really looking to understand how we can better support you.

Do you have any questions before we begin?

**Warm-up Interview (5-7 minutes)**

- **Q:** Can you tell me a little bit more about yourself and your role? How long in the role/field, etc?  
**A:**
- **Q:** Who are some of the clients that you deal with? How do you keep track of them?  
**A:**
- **Q:** How familiar are you with **REIOS and MSAS**?  
**A:**

**Contact Management: (5-10 minutes)**

- **Q:** When a new client comes in, calls, or emails, where does that person's info go?  
**A:**



# Personas vs EUPs

Personas is one of those ‘sexy UX terms’ buzzing around, yet it is usually removed from project roadmaps. I believe this is due to two convenience factors that devalue proper Personas: real data, and presentation.

The purpose of a Persona is to create a caricature of an average or percentile of real users. An imaginary embodiment of a segmented user, posted on a wall of a war room to be asked “Would Danny the Designer use this feature?”, information portrayed on the Persona needs to be quickly and easily read in that situation yet compelling enough to remind team members who they are developing for.

To combat the assumptive side of Personas, I like to first identify End User Profiles (EUPs). These are the job titles or roles of potential users that the product will affect. EUPs are the segments for User Interviews, primary profiles may be targeted in research. Eventually when enough data is captured to coalesce into an imaginary average user, which as we know is a Persona.

These exercises take time and the guidance of a UXR specialist with skills like mine to truly steer the project roadmap into a new user friendly direction.



# Hailey

42  
years old

Full time Mom,  
Lawyer,  
and Socialite

Hobbies:  
Hosting Friends,  
Traveling, Children


<b>Goals:</b>	<b>Tasks:</b>
Find someone to cut my grass. Make sure guests go outside. Only pay as often as I need to.	Prepare the house for the party. Find a Landscaper. Family duties.

The best part of my day is:  
Going home from work!

The worst part of my day is:  
Running low on time.

“Where can I find a landscaper ASAP?”

# Homeowner



# Bernard

## The Business Director

“ We kind of suck at telling stories. ”

**Vision:**

Wants to move KPMG to better adopt Power BI to leverage more of its features to better serve clients.

**Goals:**

Introduce more training for consultants to be more independant scaling the business opportunities. Building a community around Power BI would help increase our technical skill and support. Power BI armed clients are happier and more lucrative.

**Frustrations:**

The business is dependant on other older technologies where the learning curve for Power BI presents a problem. Everyone is charting their own course, due to lack of roadmap.

YEARS IN ROLE  
10+

TECHNICAL SKILL:  
★★★★☆  
Tech Savvy

Power BI Training:  
High

Org Influence:  
High



# User Research

## Personas vs EUPs (End User Profiles and more Personas)

End User Profiles - Roles' Targets						
Role	Goal	Trigger	Motivation	Availability	Device	System
Citizen - Client EE - Financial data analyst to supervisor	looking to do my job better - Find specific info	Noticed inefficiency / discrepancy (process, manufacture, sales, etc), place not hitting KPIs	quotas, production targets, increase margins, safety, regulation, environmental concerns (might have to audit, extra tests instead of 1)	virtually impossible - need specific knowledge of their data lake, gotta know what you're looking for which is almost impossible	Mobile, Tablet, Laptop	MS Purview, GIS, excel, Power BI, SAP, CRM5, Dynamics, specific other apps for industry needs
Executive						
Data Analyst	Organize (cleansing), Understand, present info	Request from exec, financial reporting, environmental, regulatory, reporting	templating reports, reharvesting reports makes job easier	Very available, hard to find, 100,000s assets available to them, filtering/search issue	laptop	Purview, SAP, Dynamics, Synapse
Developer						
Stewards	Clean and Maintain Data	New data arrives or is catalogued	by cleaning and maintaining the data, they're enabling people around them to make better choices. And to use it more effectively - less work on me, empower others to make me look good	Complete, they know what they're looking for and how to query it	laptop	Purview, Master Data Management (MDM) solutions, word doc somewhere

End User Profiles - Roles' Targets						
Role	Goal	Trigger	Motivation	Availability	Device	System
Job Title / who	intended purpose	Why they suddenly need it	What is in it for them	how easy is it to access the info	What Devices are they using to access this	which system are they using to accomplish their goal
Vendor	deliver, get paid	receives an order	accurate delivery, COD?	order info, creates invoice	mobile? desktop at office? pen & paper?	invoice system, pen & paper
cafe EE	receive order, place order inventory, cook	empty shelves, receives delivery	need inventory to serve food	inventory, order info, invoice	mobile, tablet	DIP Invoice, pen & Paper
cafe Manager	approve invoices		Manage Finances	invoice	desktop	finance system? DIP Invoice
Aramark EE?						
Birch Street EE	approve invoice, send payment	gets list of approved payments to push through	gets paid per payment request	invoice, future: invoice data only	desktop	DIP Invoice, other

End User Profiles - Roles' Targets							Opportunities		Data Required
Role	Goal	Trigger	Motivation	Availability	Device	System			
Service Leaders (Champions / GPOs) (KH EE)	Increase GBS / Tower brand equity Deliver efficient kpis - sig	Net Promoter Score sustained for f corp	personal branding, growing client list, service offering, career growth - create capacity, then up, add more roles - wants to reduce middle management, provide value add and / or region based assets, GBS branding and customer experience	diff - manual - poorly designed system	laptop, mobile	email, service now, word ANZ, knowledge base in service now EU, reporting through tableau and excel	use gen ai to classify tickets, recommendations for improving - trend analysis	Identify ticket reduction opportunities e.g. 40% tickets per resets	Identify opportunities for self service
FLM Frontline Managers	Deliver customer service Suitably Quality services that satisfy KHC	Customer Satisfaction Escalations	Client retention, client sat, promotion - reduce demand of future tickets (reduce need for billing - wants to increase head count)	low - time consuming - manual- lack of reporting tools -	laptop	service now, virtual desktop, word ANZ, knowledge base in service now EU, reporting through tableau and excel	use gen ai for getting data from SOPs/historical tickets to solve problems now	Identify and develop FAQs documents	Develop pre-program answered to common questions.
Service Team Leads	teams compliant with kpis - lower cost - create sop	escalation or kpi being missed, rework (was not done right)	SLA - Successful in role - Perform in role - keep your job - reduce demand	low - time consuming - manual- lack of reporting tools - no priority for tickets	laptop	service now, virtual desktop, word ANZ, knowledge base in service now EU	General "ask GPT" type functionality e.g. what's the best way for me to solve x, what's the most common reason for y, what's changed with zpt	Live visibility and GBS led escalation triggers i.e. proactive and not reactive from the customer	Identify and develop FAQs documents
							Develop best practice guides	Failure analysis (Map with RCAs for MPRs)	Update SOPs



### Dana

The Developer

“We’re limited in investigating what is possible or what went wrong. Version controlling is really a challenge for us”

**Vision:**  
To have business teams understand what is possible in Power BI and make concise requests for visuals and data, shortening the turn around time for requests that require custom solutions.

**Goals:**  
Solving requests as quickly as possible which sometimes means hacking together some features, custom hacks which cannot be duplicated and dont scale well though.

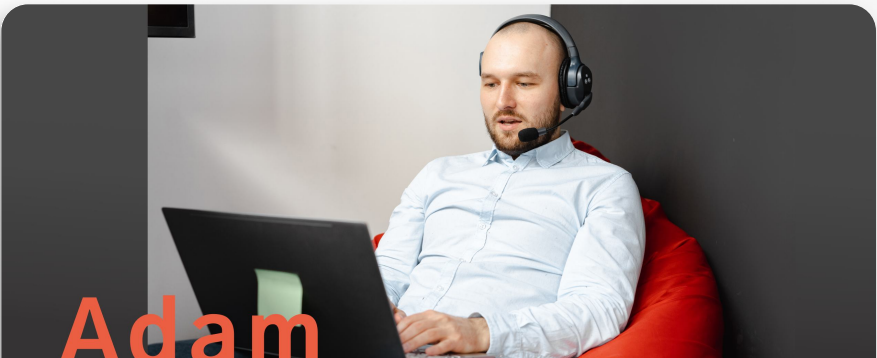
**Frustrations:**  
New teammates cannot work together on the same report, so instances are duplicated from one user to another and the versioning gets out of control.

YEARS IN ROLE  
3

TECHNICAL SKILL:  
★★★★★  
Expert

Power BI Training:  
High

Org Influence:  
Low



### Adam

The Administrator

“There’s definitely a lot of opportunity to implement automation.”

**Vision:**  
To have clear policy and instructions for solving our business teams’ asks. Helping them have more concise questions would also be great.

**Goals:**  
Enabling the engagement team to succeed by quickly removing any hurdles they face. Having a process to correctly distribute licensing amongst our users would be key.

**Frustrations:**  
There are lot of manual workflows to follow which could be automated, especially all the simple requests like permissions to a workspace for example which is like 80% of our requests; quick simple fixes that the business user could do themselves but take time in the escalation process.

YEARS IN ROLE  
5

TECHNICAL SKILL:  
★★★★★  
Highly Capable

Power BI Training:  
Low

Org Influence:  
Low



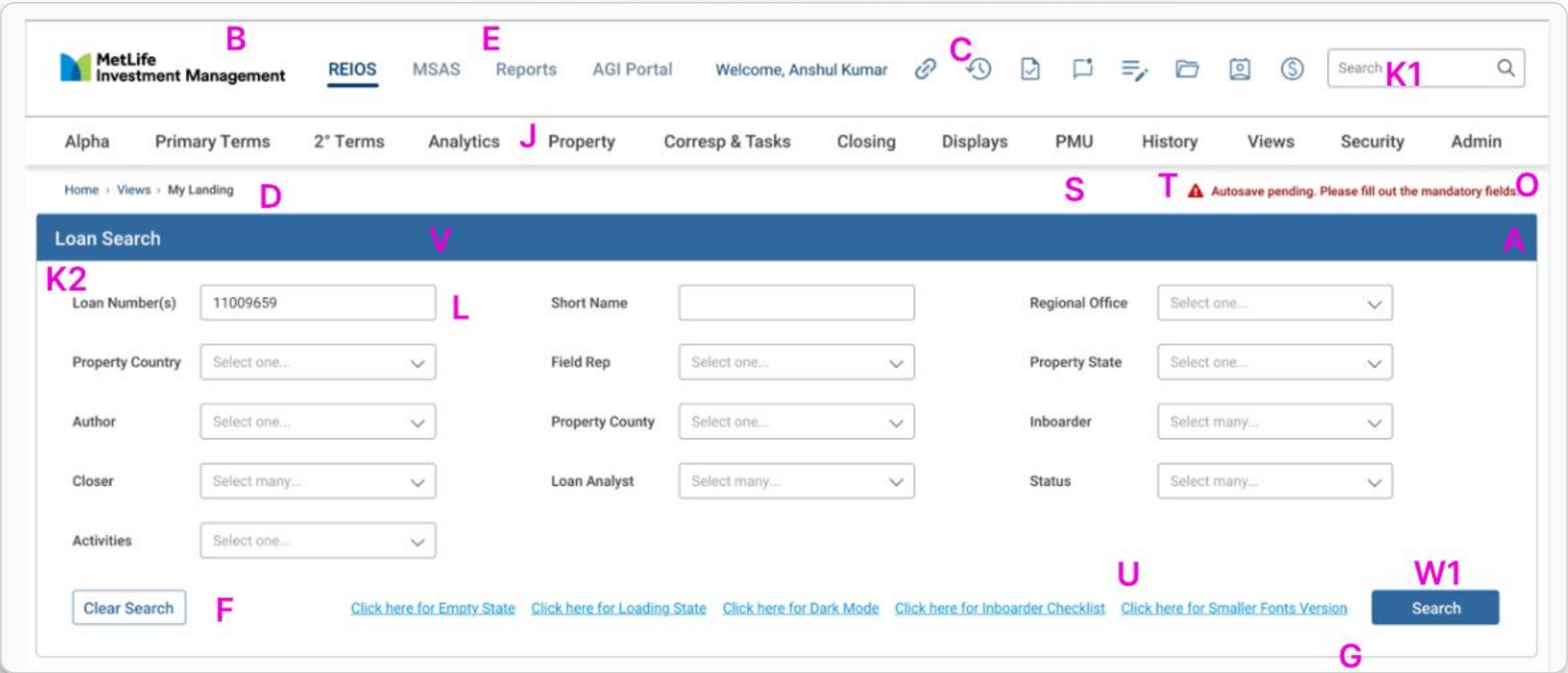
# Information Architecture

## Heuristic Analysis

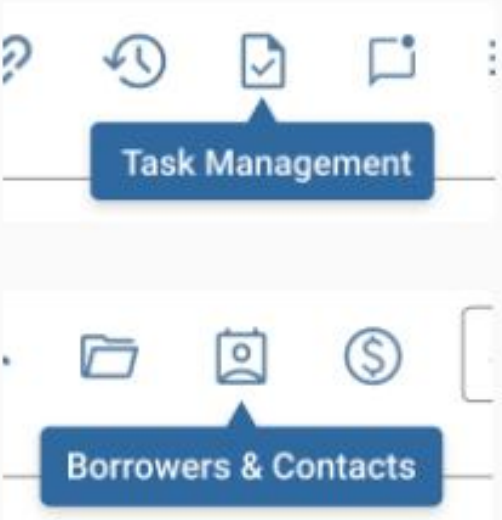
As a product designer, conducting a Heuristic Analysis offers several valuable benefits. I gain a deep understanding of the user experience by immersing myself in the product, using it firsthand, reading training material, and observing users. This perspective allows me to identify pain points, usability issues, and areas for improvement.

Heuristic analysis goes beyond surface-level visual assessments; it helps me inspect the system’s architecture, navigation, and interactions. I have used “fly on the wall” observations of real users engaging with the products.

This holistic view helps uncover hidden flaws and opportunities. Moreover, applying established usability principles early in the design process allows me to catch potential problems and prioritize design changes effectively. It empowers the team to see through the eyes of users, ensuring that our product resonates with their needs and expectations.



- A - No way to minimize search parameters. Alternative is to have advanced options with ability to expand/shrink.
- B - Logo, Navigation, welcome, toolbar, search all in one bar. too cluttered
- C - Icons only not clear, tooltips funky, quick actions or navigation? It is best not to rely on tooltips.
- D - Breadcrumbs not matching navigation or sub navigation, Home = REIOS? Should be REIOS> Views> My Landing. Furthermore why is “My Landing not just the REIOS home? IS page just Loan Search Page?
- E - REIOS is highlighted but secondary Nav is not. In DDD, macro apps should be hidden; task based navigation
- F - Why is clear so far from search and a secondary btn?
- G - Table options get icon plus label? might be better as a dropdown.
- H - No header style for table



Task management & Corresp & Tasks in menu, 2 ‘task’ navigation items is confusing.

Icons and labels should be repeated in their own page to establish visual language

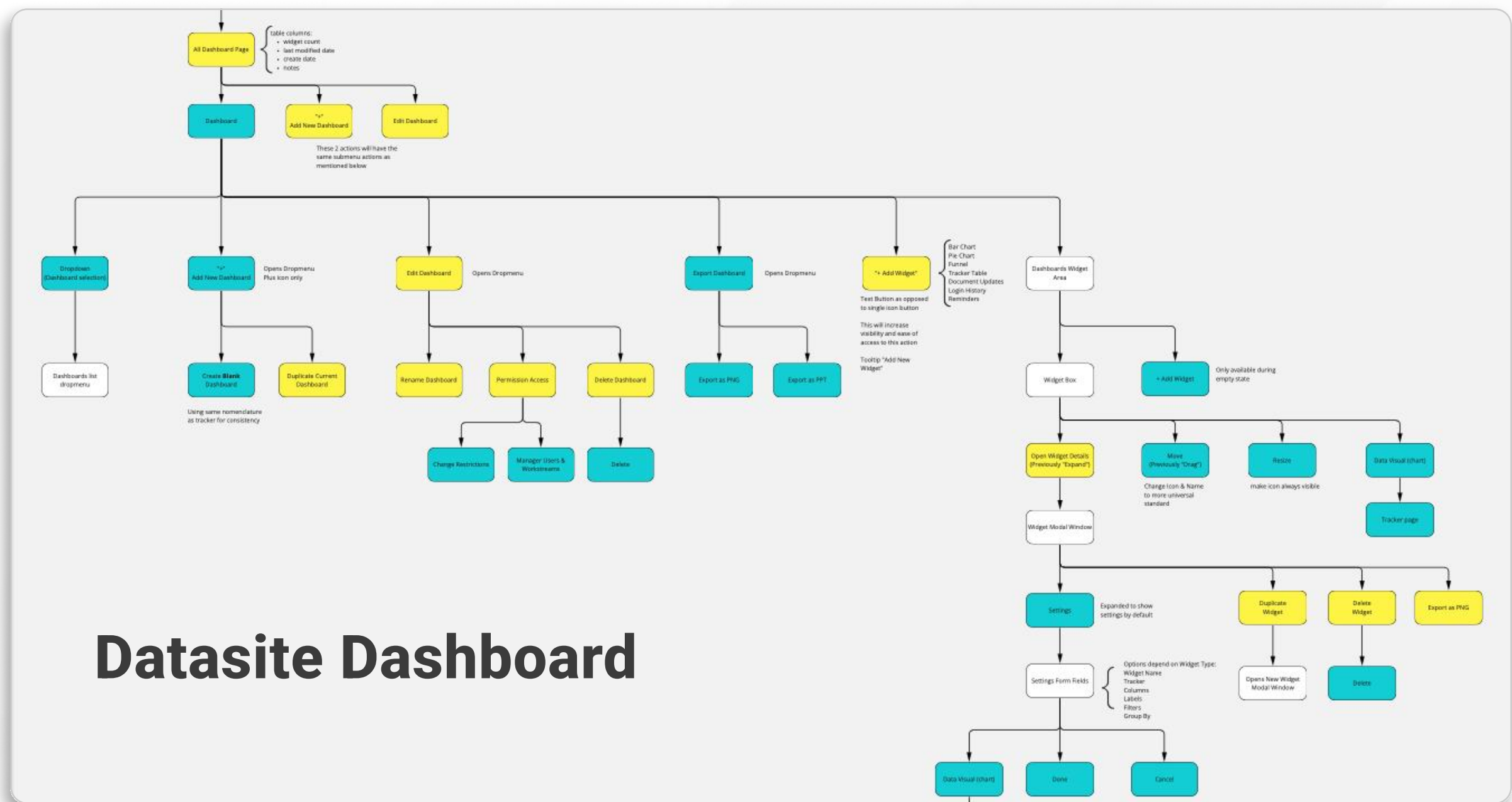


# User Flow Optimization

At the core of user experience is how a user gets to where they want to go, their user flow. Different from a sitemap (places), Architecture Map (places & technology), and Journey Maps (actions & emotions), a User flow highlights the places and actions that a user can take at any given moment in a system. I have created a process that relies heavily on user flow identification and optimization.

User flows help me understand all options and paths a user can take. Dead ends become obvious, steps noted to find hard to reach pages, hierarchies appear and violations of this order begin to resonate with user frustrations. Realsure was a great example of highlighting user frustrations while Datasite gave us opportunities to enhance the UI and reduce visual load, ensuring proximity relieves any cognitive dissonance.

Since everything in a User Flow is a 1:1 relation to all components in wireframes, Optimizing these user flows directly effects the layout and component organization of a screen enhancing the UI.



## Gmail Action Toolbar Example

**See the ePay use case on page 14**



# Information Architecture

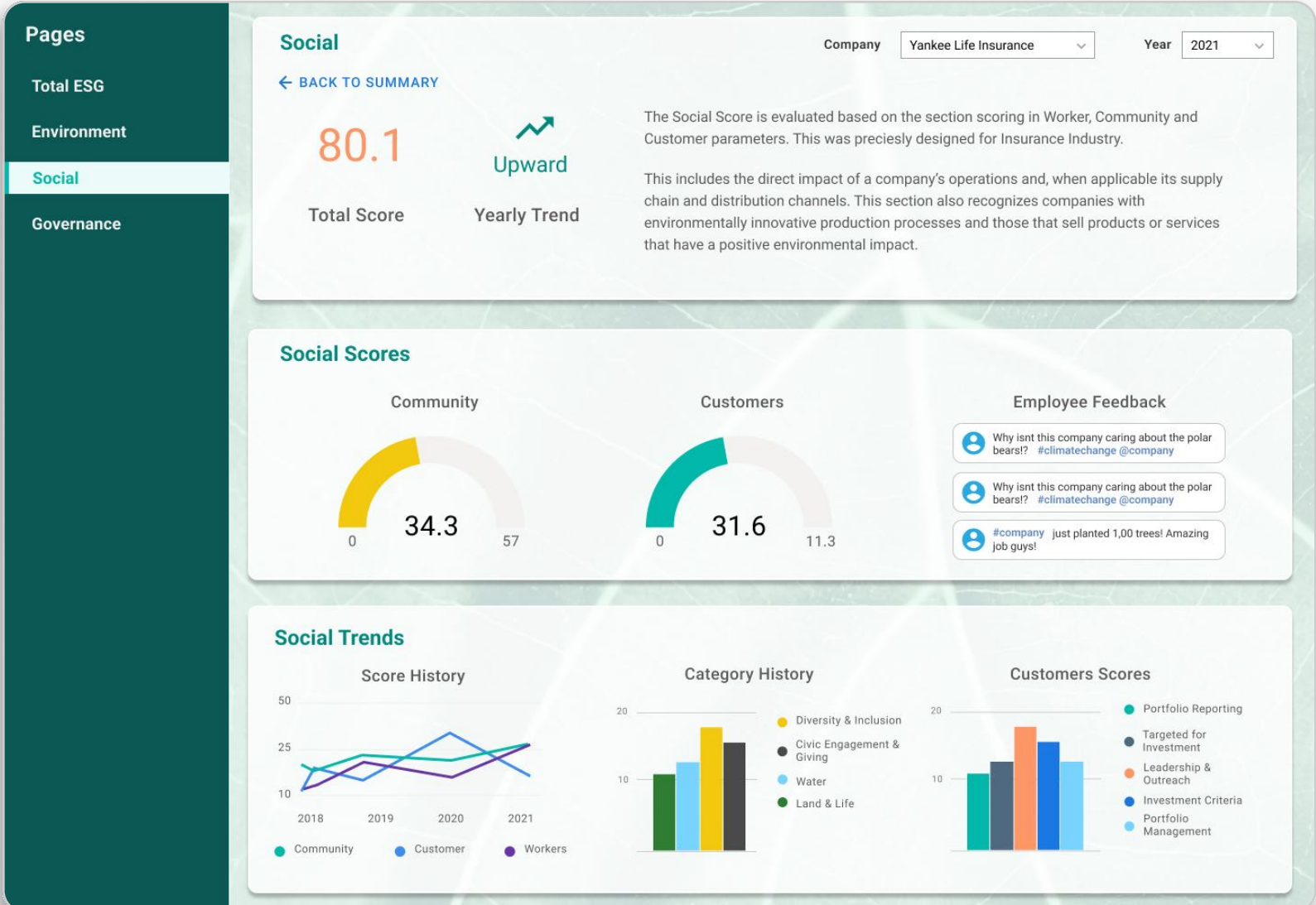
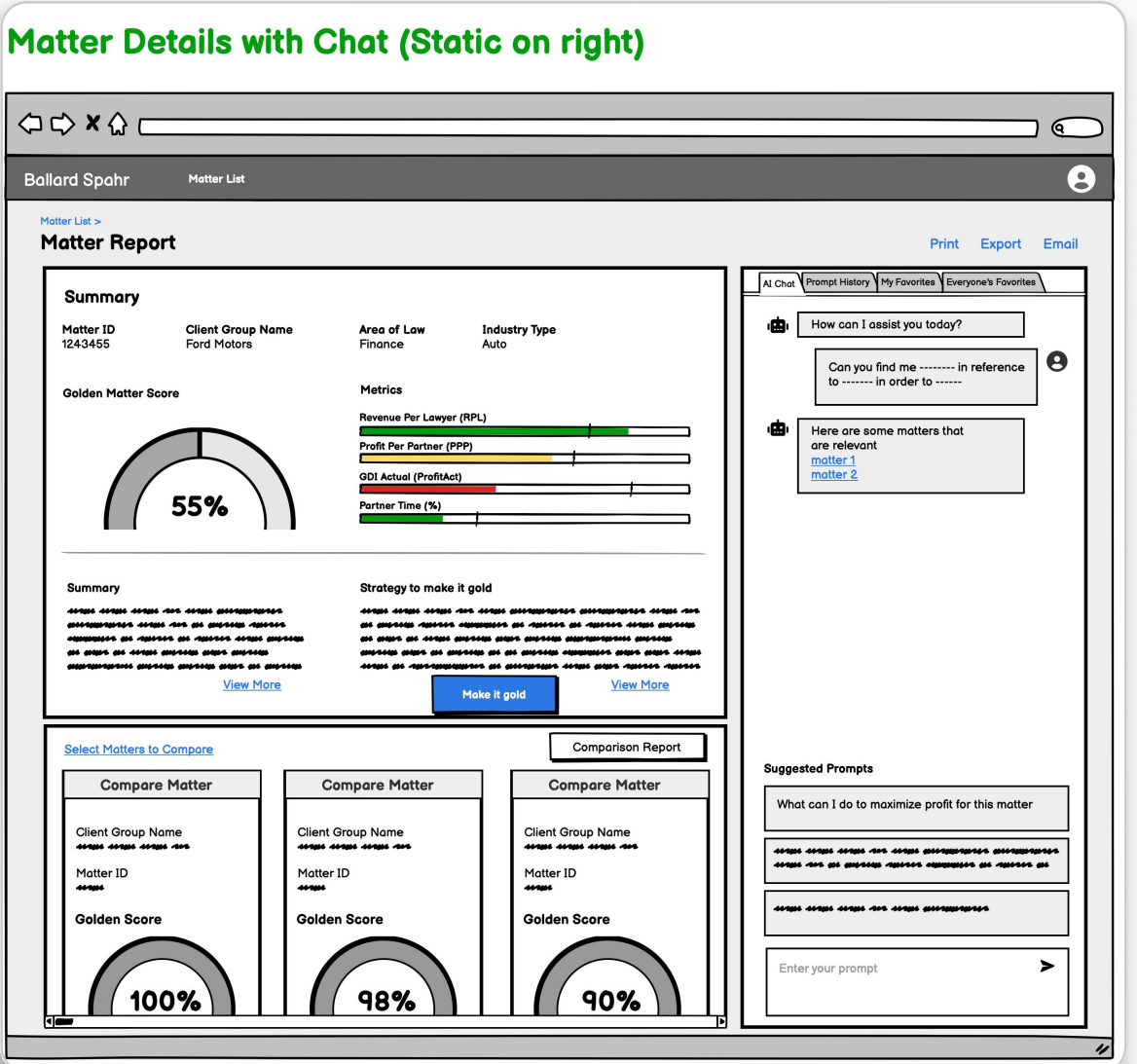
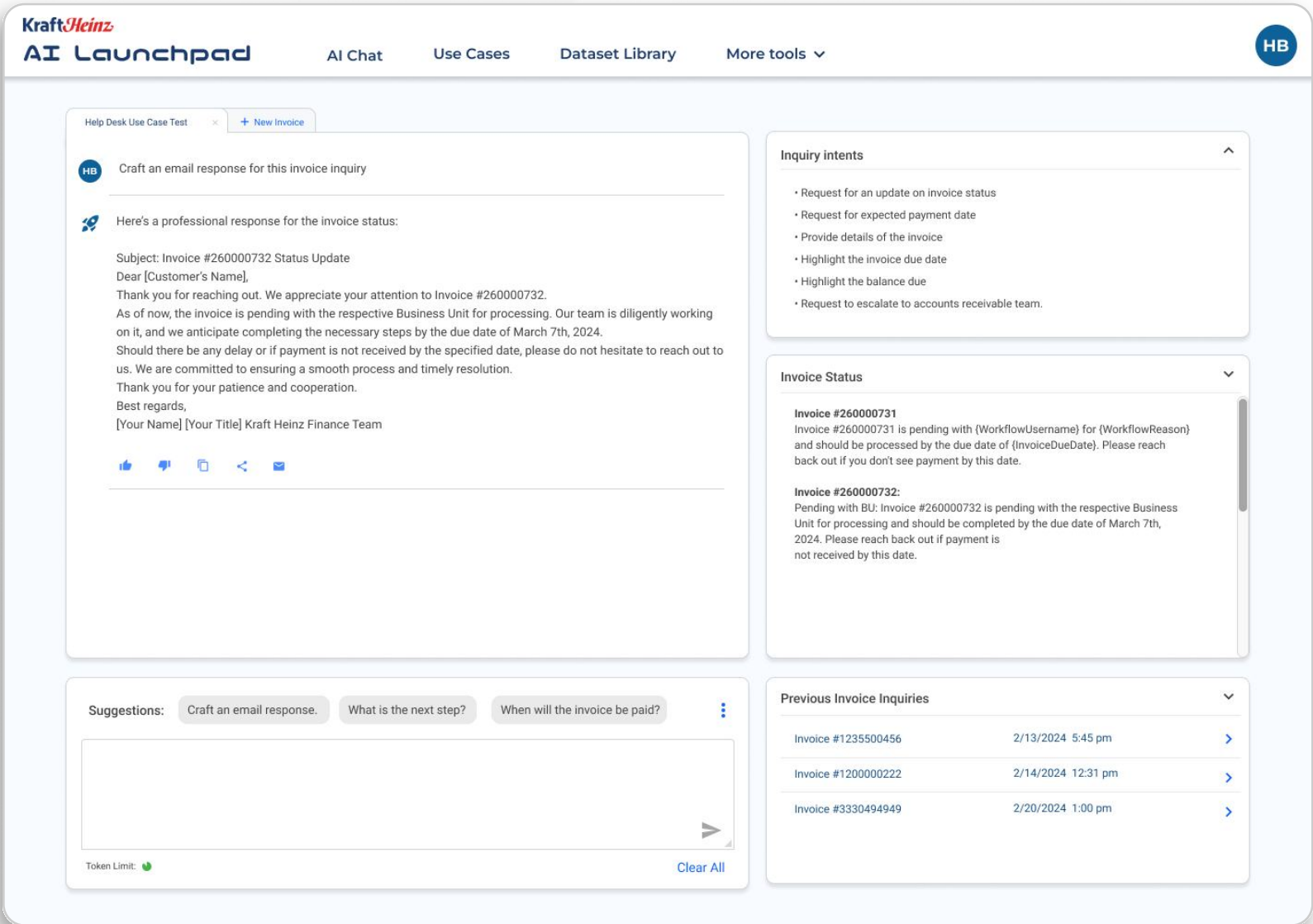
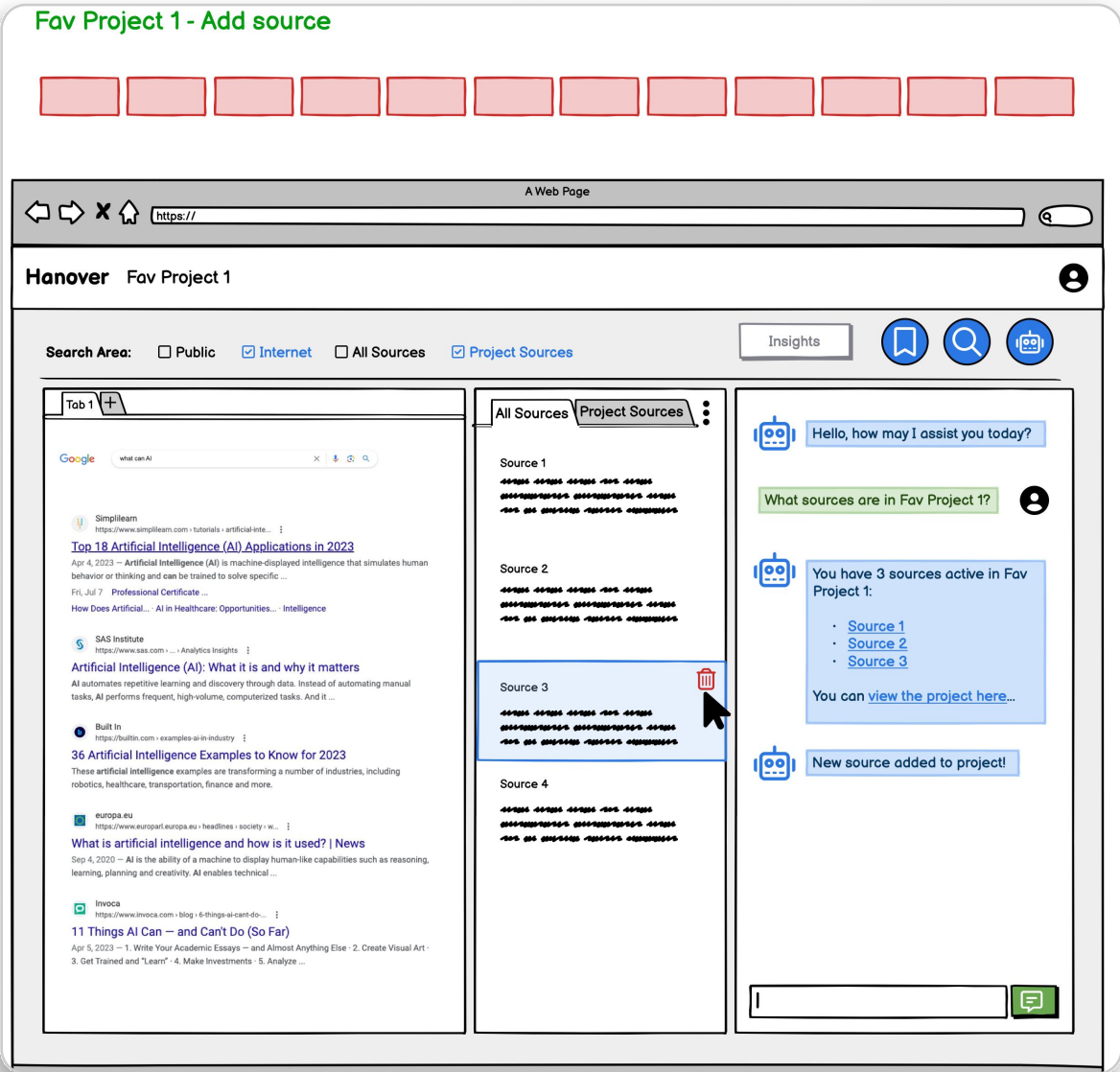
## Wireframe Cycle

Once a User Flow has been solidified, it is used as the foundation to wireframes, nothing new is added in the wires unless it is added to the user flow. Wires can be used as part of the Definition of Ready: helping the product owner to discover requirements, or the Definition of Done: as a QA reference for what a developers final deliverable should look and feel and act like. With these different needs come different iterations of my wireframing process that I have honed.

I always start the wireframing process in Low Fidelity - this helps focus on problem solving and layout composition. The lack of color and interactions helps focus the audience on what is most valuable to help the user accomplish their goal.

High Fidelity wires incorporate the Design System, Style Guide, or Front End Library into the picture. This will be the closes to a pixel perfect iteration of the final product.

Lastly comes the prototype phase, which can be done in Low or High Fidelity. I limit prototypes to Use Case Scenarios, or single workflows that can be used in User Testing or for demos. Helping teams focus on user flows helps avoid massive 100 screen prototypes that take too long to build and require too many modifications as a whole.





# Information Architecture

## Styles Governance

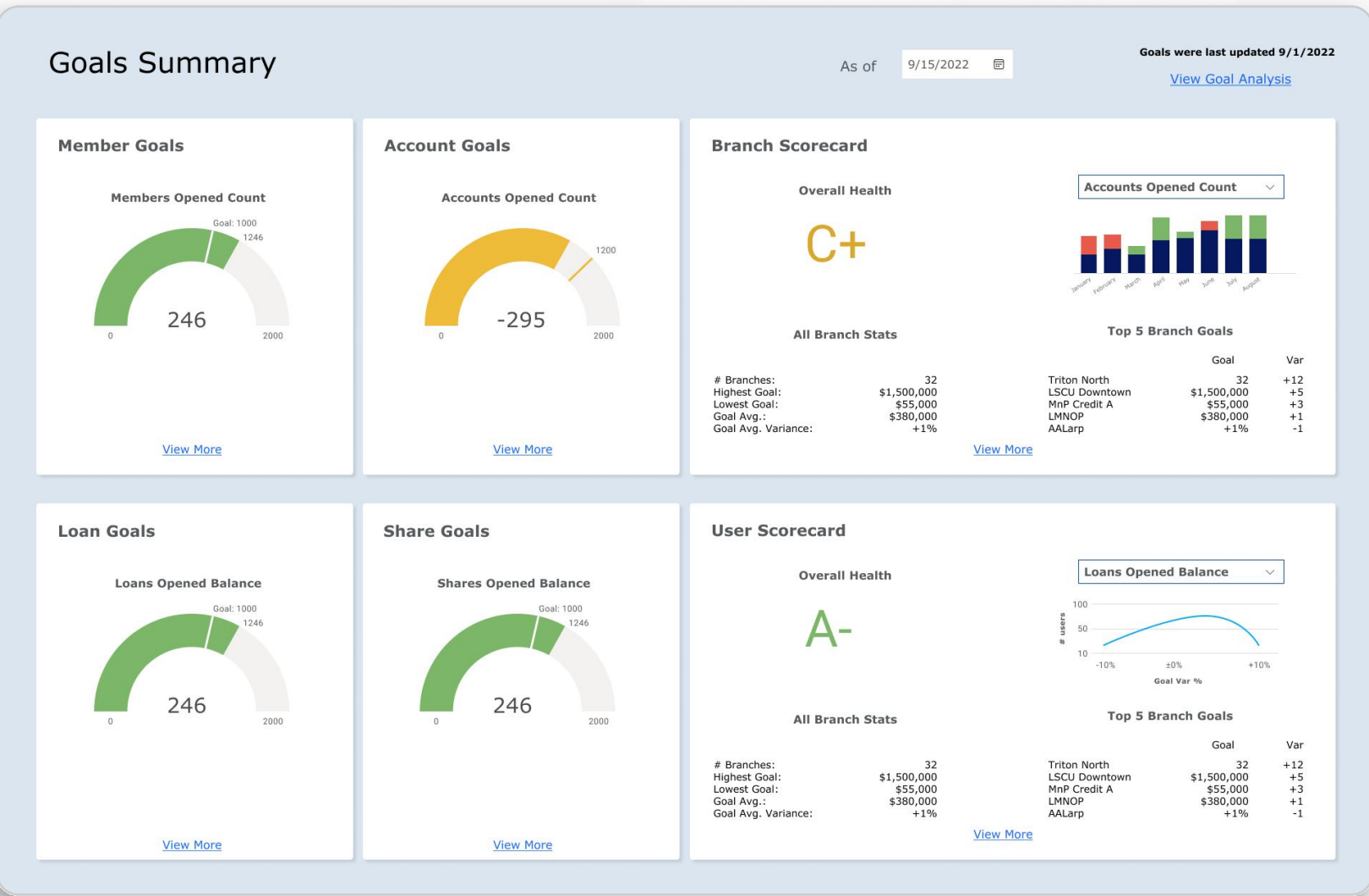
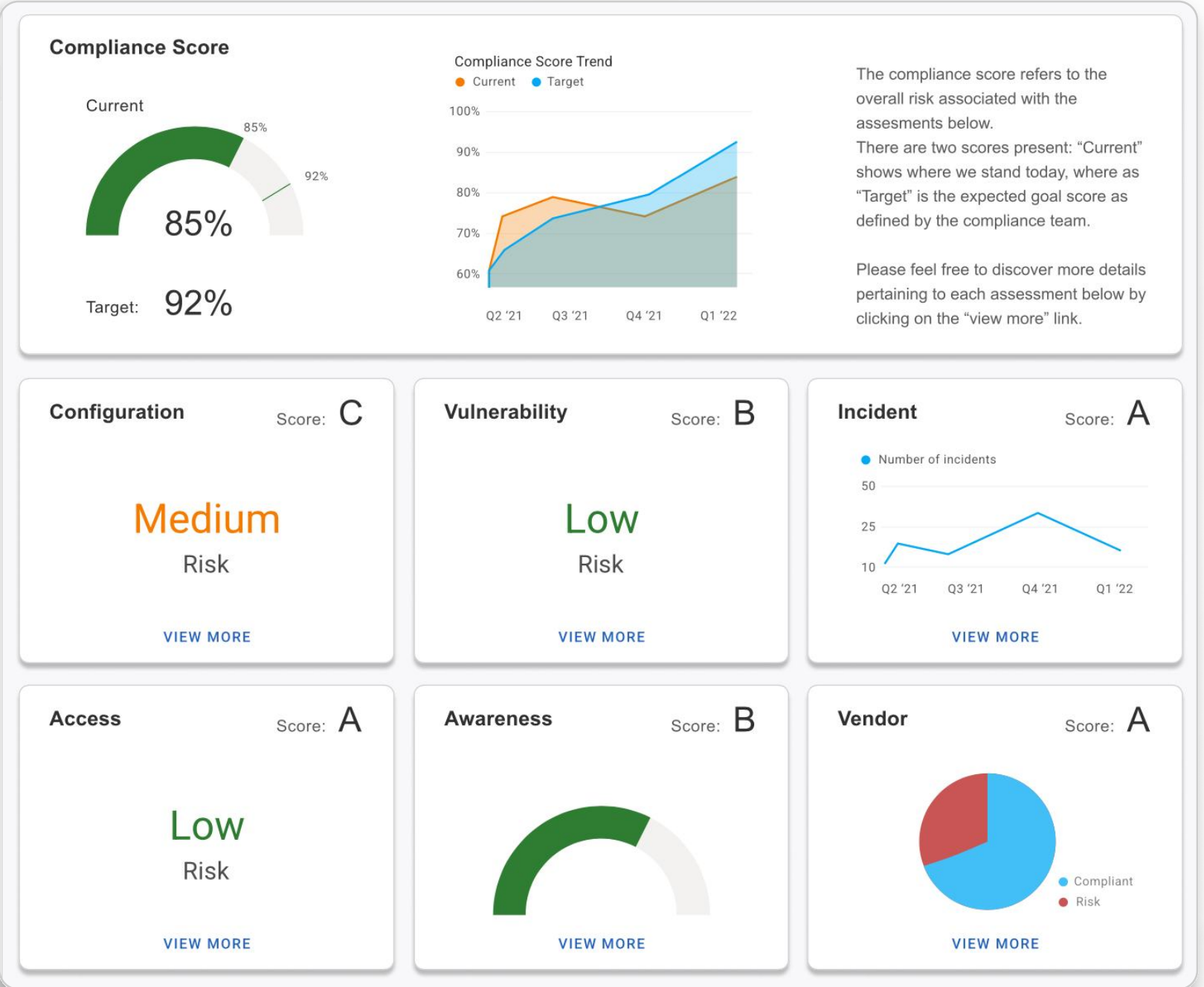
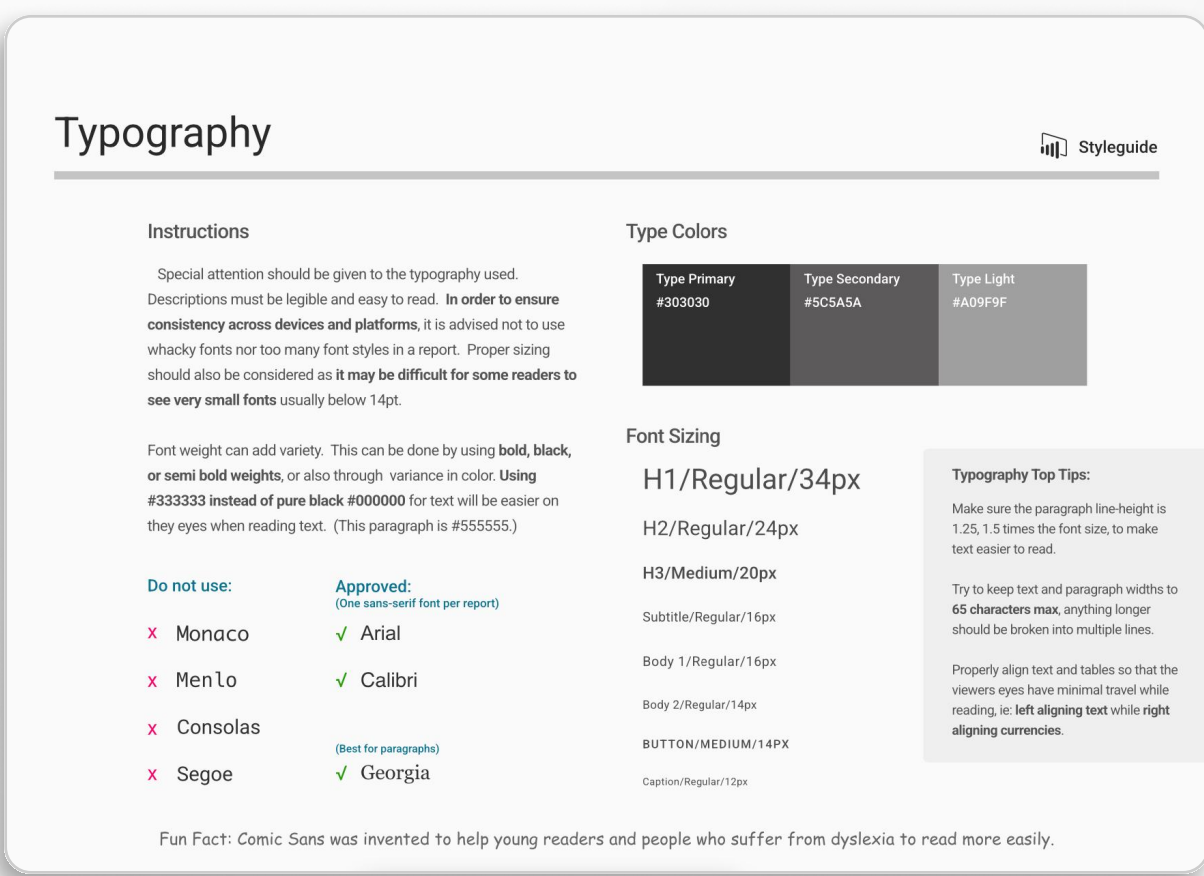
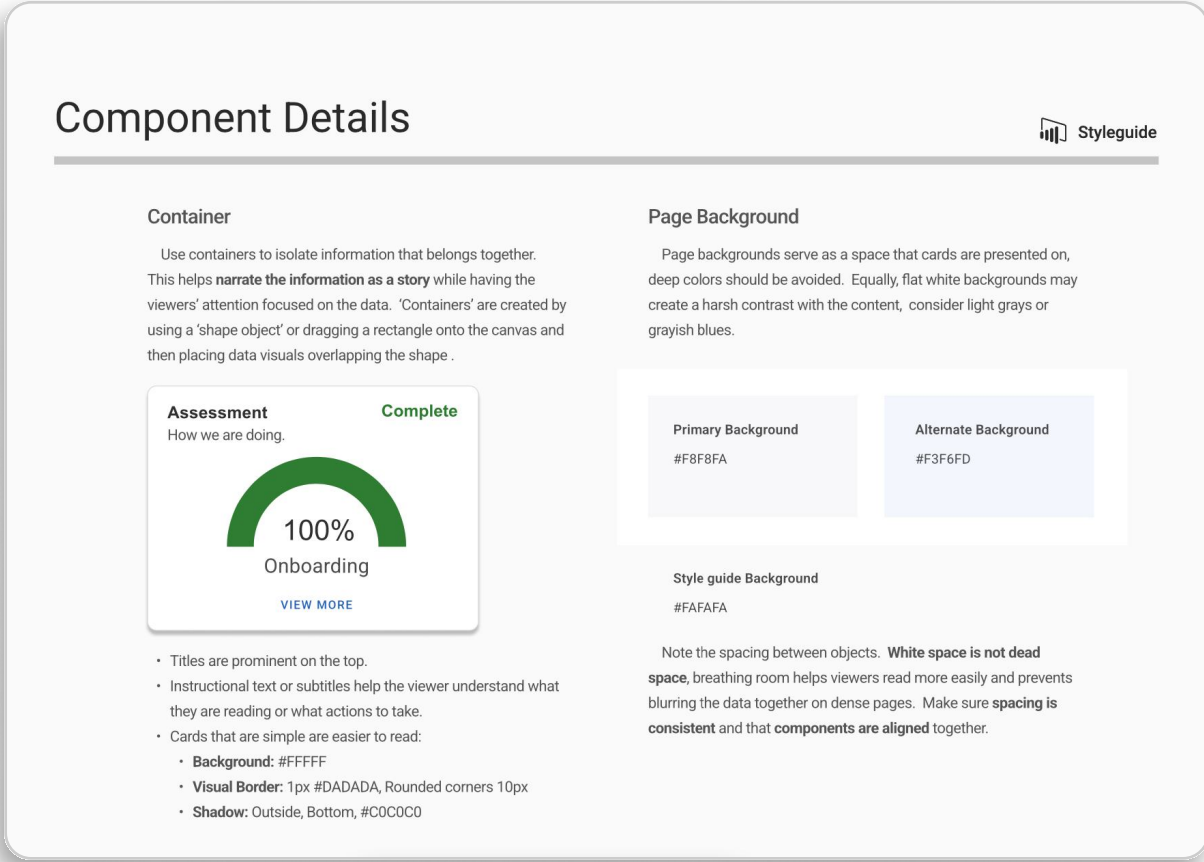
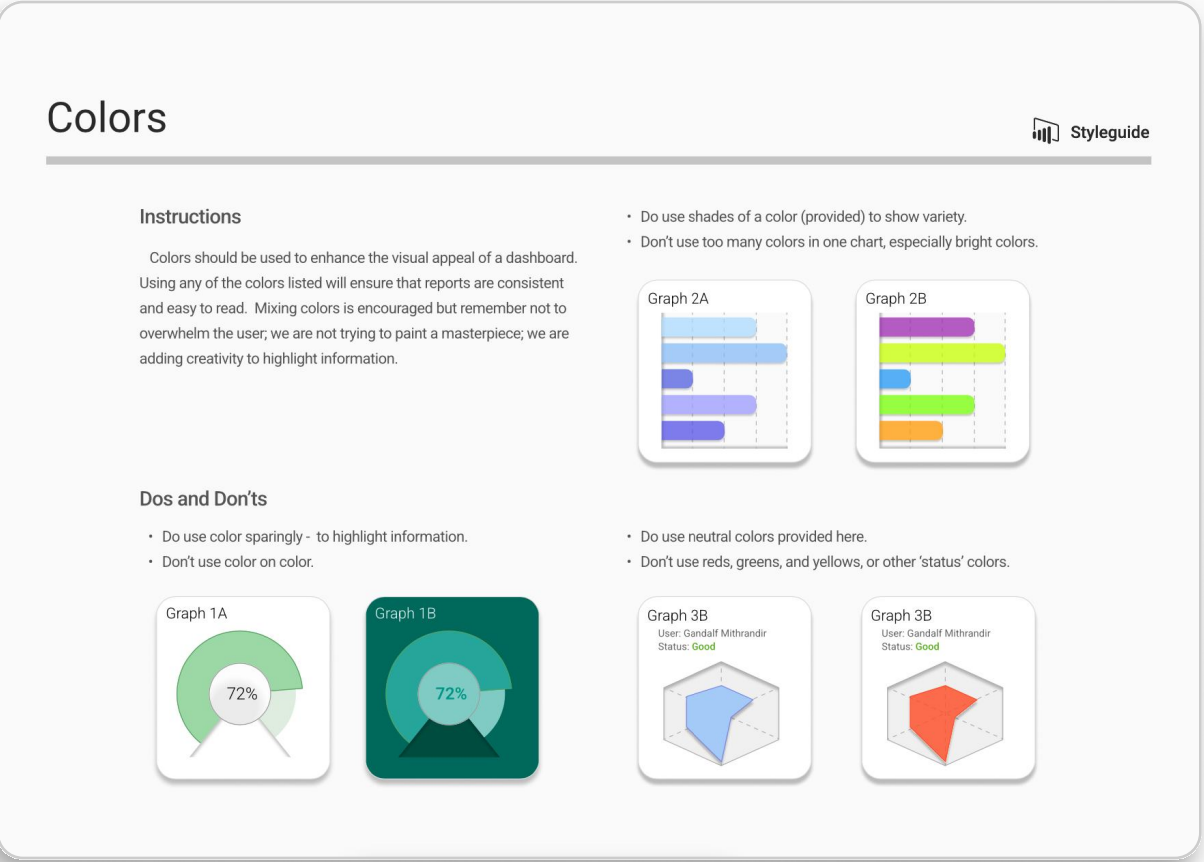
Creating and applying a Design System or Style Guide is more than just selecting colors that look cool. Action sentiments must be interpreted to a brand to ensure consistency. Styles need to be matched to the front end library in order to reduce custom code, which will inherently increase production time. These are all topics I have balanced into styles that again push towards product goals. Even the colors used need to promote the original goal identified, support the user flows created, and beautify the layouts to be engaging and readable to users.

More than just painting the wireframes, Styles need to promote the functionality of the product. I always say:

*“When everything stands out, nothing stands out”*

My style is simple and clean, only personalizing the elements that give a brand its flavor while enhancing the items that beckon for user attention. Checkout these pages from a style guide I created for a team wanting to make their Power BI reports more consistent.

When there is a need to be to push the limit and create far out, artistic interfaces, the artistic styles must be in line with the original goals of the product vision.





# Visual Design

## Accessibility Accelerator

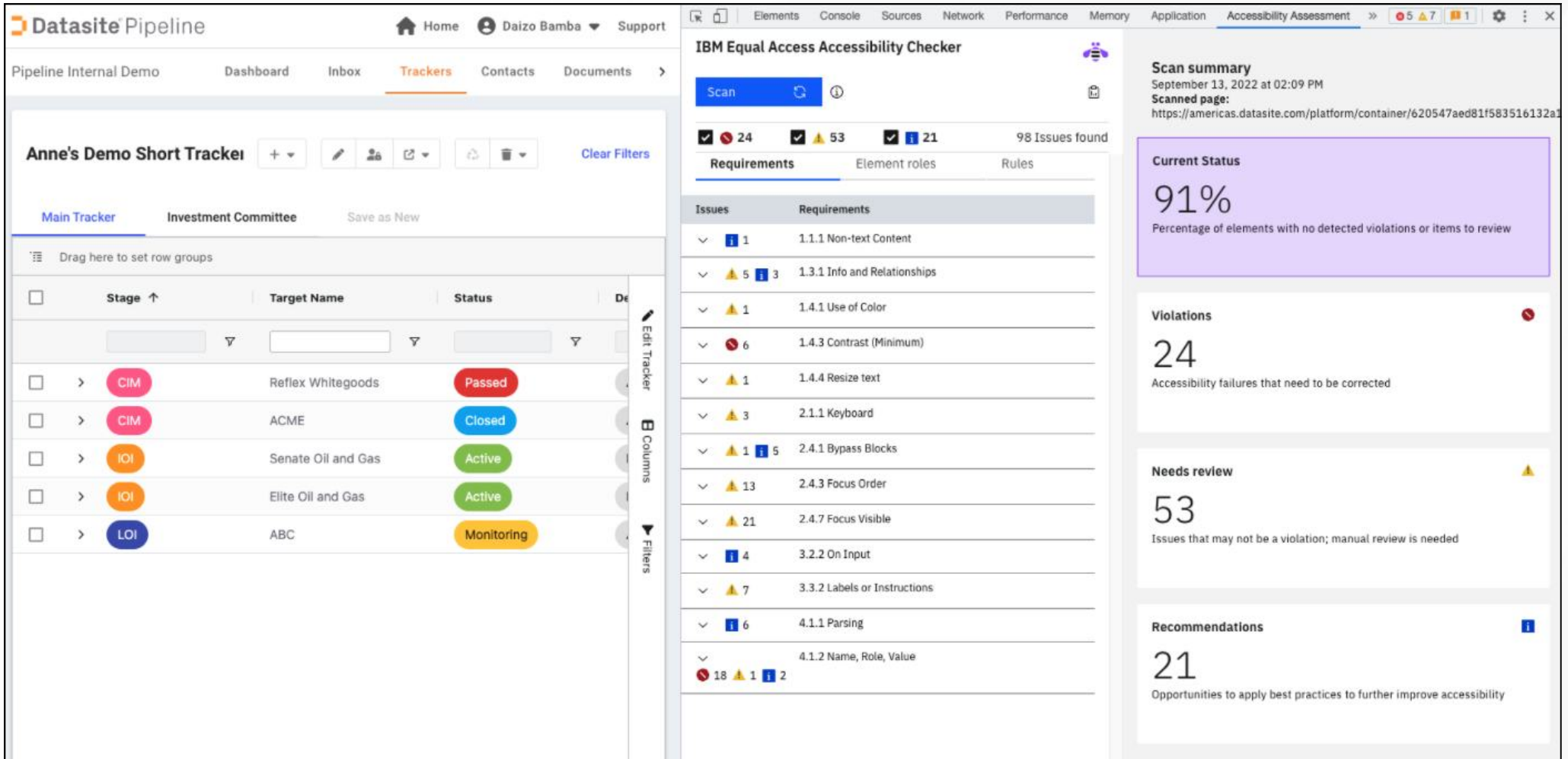
As tech savvy generations age, they will begin dealing with a limitation to accessing the information they once took for granted. Accessibility addresses multiple forms of disabilities that inherently affect the user experience of products, more than just color contrasts.

I created the Accessibility Accelerator at Neudesic. This service helped clients assess and plan updates to their products to become more compliant with accessibility standards. This process combines several artifacts with an educational portion on how to update the style, code, and layout of a product in order to achieve certain standards.

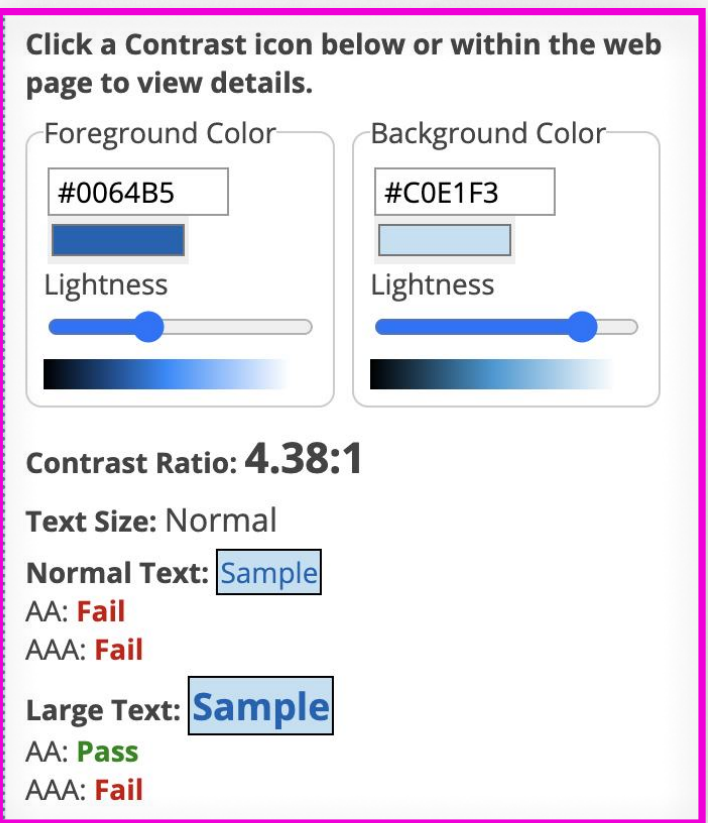
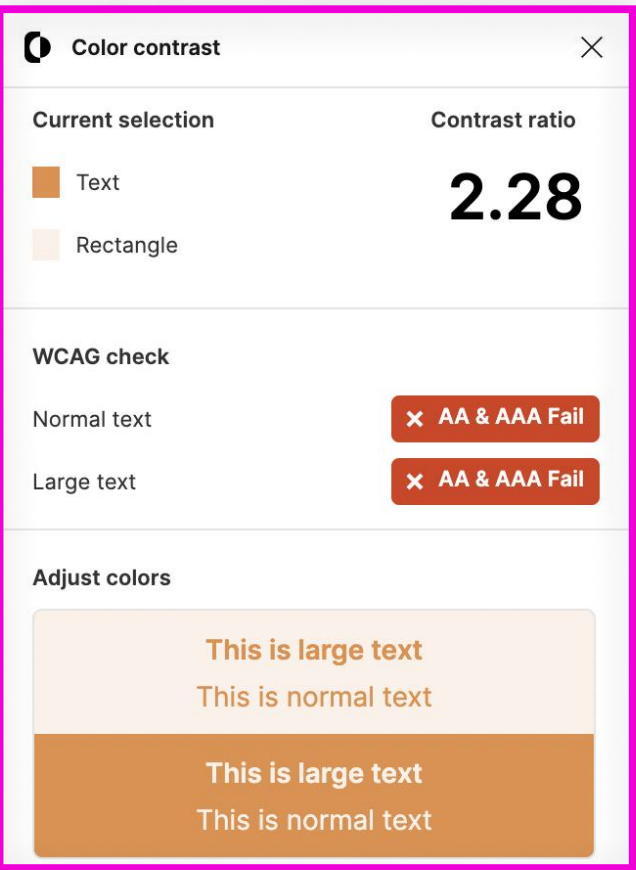
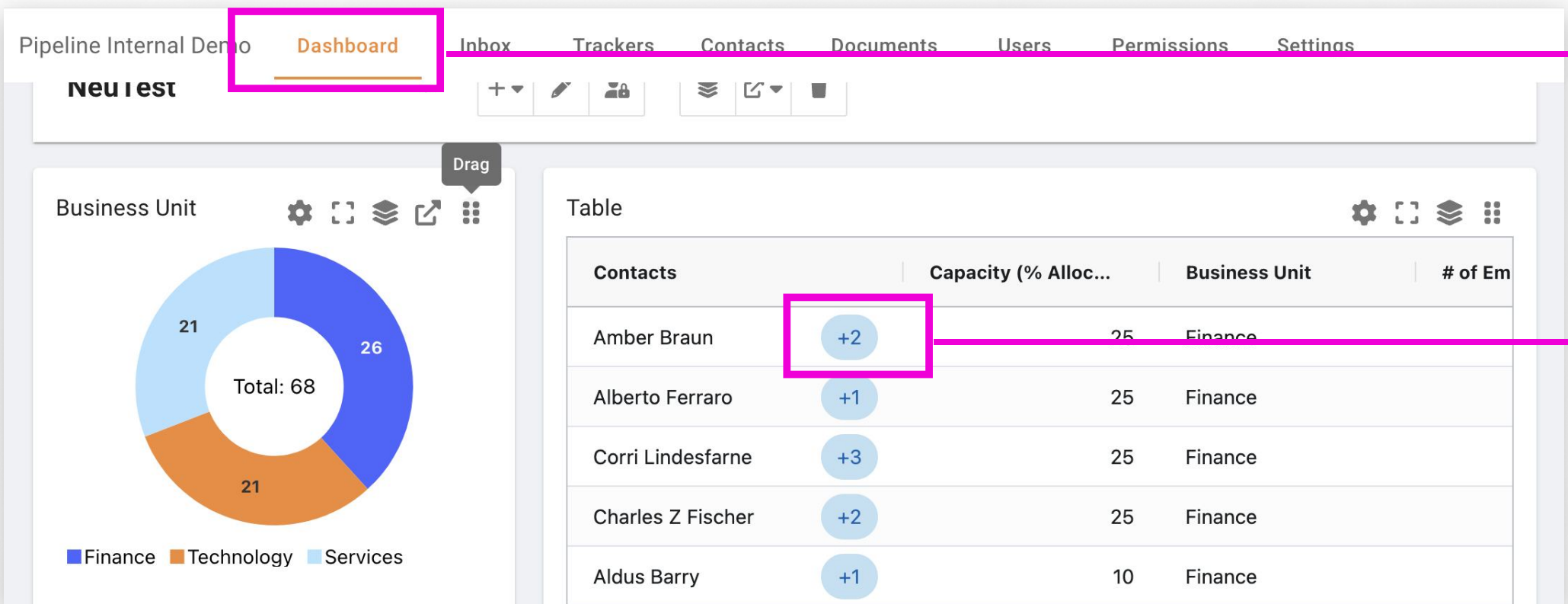
The Accessibility Accelerator included the following:

- WCAG introduction & legal overview
- A, AA, AAA reference guide
- Future Steps
- IBM Accessibility Checker report
- VPAT of competitors and templates
- Concept to Product Kickoff workshop
- Focus state analysis
- End User Profiles
- Sitemap and Current User flow assessment
- Optimized User Flows
- WCAG version breakdown
- Accessibility and Heuristic Analysis
- Competitor Analysis
- Style Analysis
- Front end code Accessibility tools

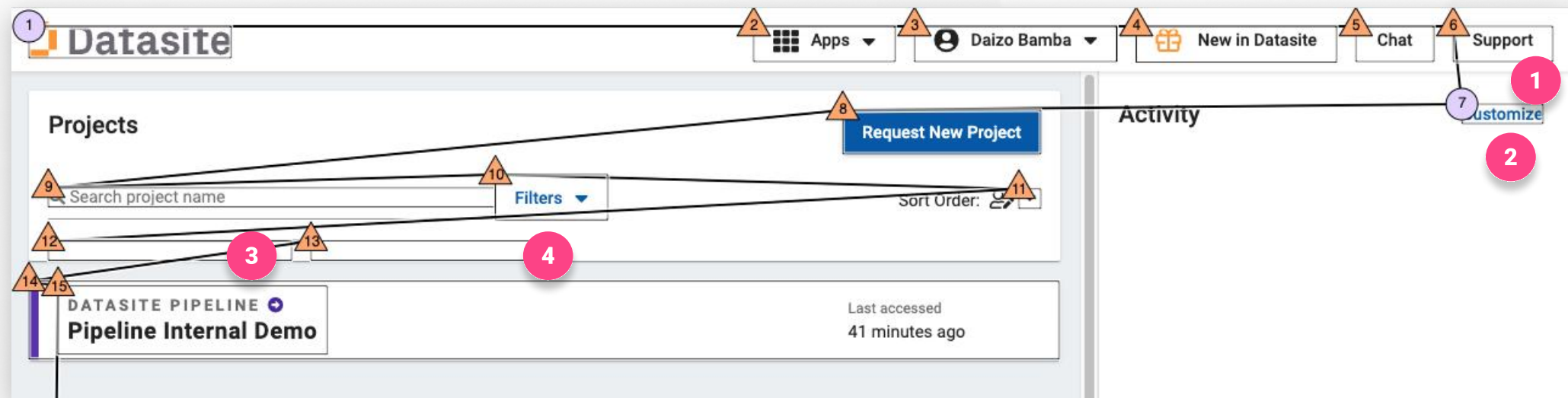
### IBM Accessibility Checker Report



### Dashboard Color Issues



### GLOP - Tabbing Order





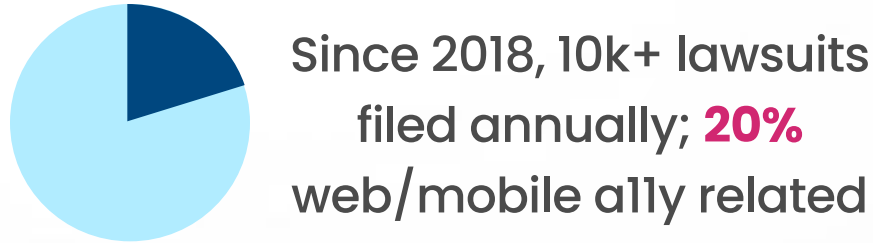
Visual Design

# Accessibility Accelerator

### Federal Court Filings

**8000+** Digital Ally Lawsuits between 2017–2020

### ADA Title III Lawsuits



### Inconsistent rulings due to the lack of defined web ally regulations

#### Robles v. Domino’s Pizza (2019)

Unable to order pizza online due to ally issues

**Ruling:** Domino’s must comply w/ **WCAG 2.0**

#### Thurston v. Midvale Corp (2019)

Unable to access restaurant website w/ screen reader

**Ruling:** Midvale must comply w/ **WCAG 2.0 AA**

## Regulatory Enforcement

### Federal Level

- **ADA** – Americans w/ Disabilities
- **Section 508** of Rehabilitation Act
- **Air Carrier Access Act**
- **Section 1557** of Affordable Care Act

### State Level

- **NY State & City Human Rights Laws**
- **CA: Unruh Civil Rights Act**

Violating these these laws can result in fines of **\$55,000** to **\$75,000** for first-time violations and **\$150,000** for every repeated violation for the latter.

Web accessibility is not just about compliance, it's about creating an inclusive web experience for everyone.

## Accessibility Accelerator

It's estimated that companies without accessible sites are losing **\$6.9 billion a year to competitors** whose sites are accessible. Be proactive by identifying your website's accessibility issues and find solutions. As a result you can reach a wider audience, improve user experience, and demonstrate your commitment to social responsibility.

### Accessibility Introduction

- Introduction to accessibility standards and why they are relevant to your business.
- Potential legal repercussions of not adhering to web accessibility.

### Collaborative Workshops

- Align on team goals, risks, and reasons to make changes.
- Action item prioritization across multi-disciplinary teams,

### Product Assessment

- In-depth accessibility/usability analysis.
- Auto-generated reporting tools.
- Identify workflow inefficiencies.

### Roadmap and Strategy

- Guidance on next step actions; short-term/ long-term changes.
- Accessibility tools to help with future QA testing.

### 4-6 Week Accelerator Process:

- Concept to Product Kickoff
- End User Profiling
- Heuristic / Accessibility Analysis
- Competitor Analysis\* \*Optional
- Style Analysis
- Sitemap & current state User Flow
- User Flow Optimization
- IBM Accessibility Checker\*

\*Requires Web browser based application

### For More Information Contact Us

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# Case Studies

## ePay

My greatest success story from Realogy.

The team had spent 3 extra years and were several million dollars over budget when I joined. They were trying to modernize the payment portal that real estate agents needed to use to pay their bills. Not only was the technology stack disparaged among several different libraries, but the product owners only wanted to update the tech and style.

As with all Digital Transformation efforts, when the technology changes, it opens up new possibilities to optimize the experience for users and potentially grow the business, it is more than a tech only problem.

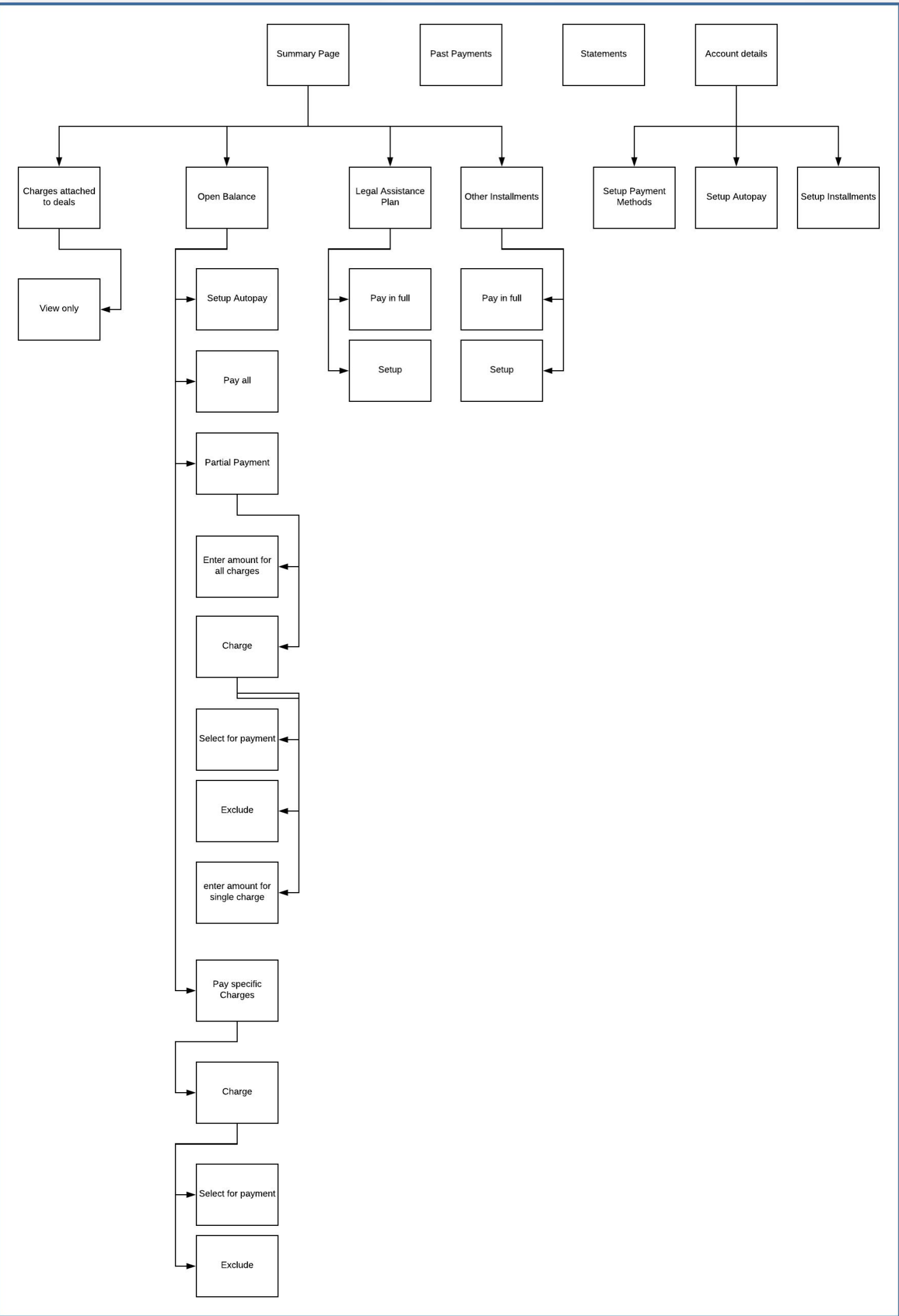
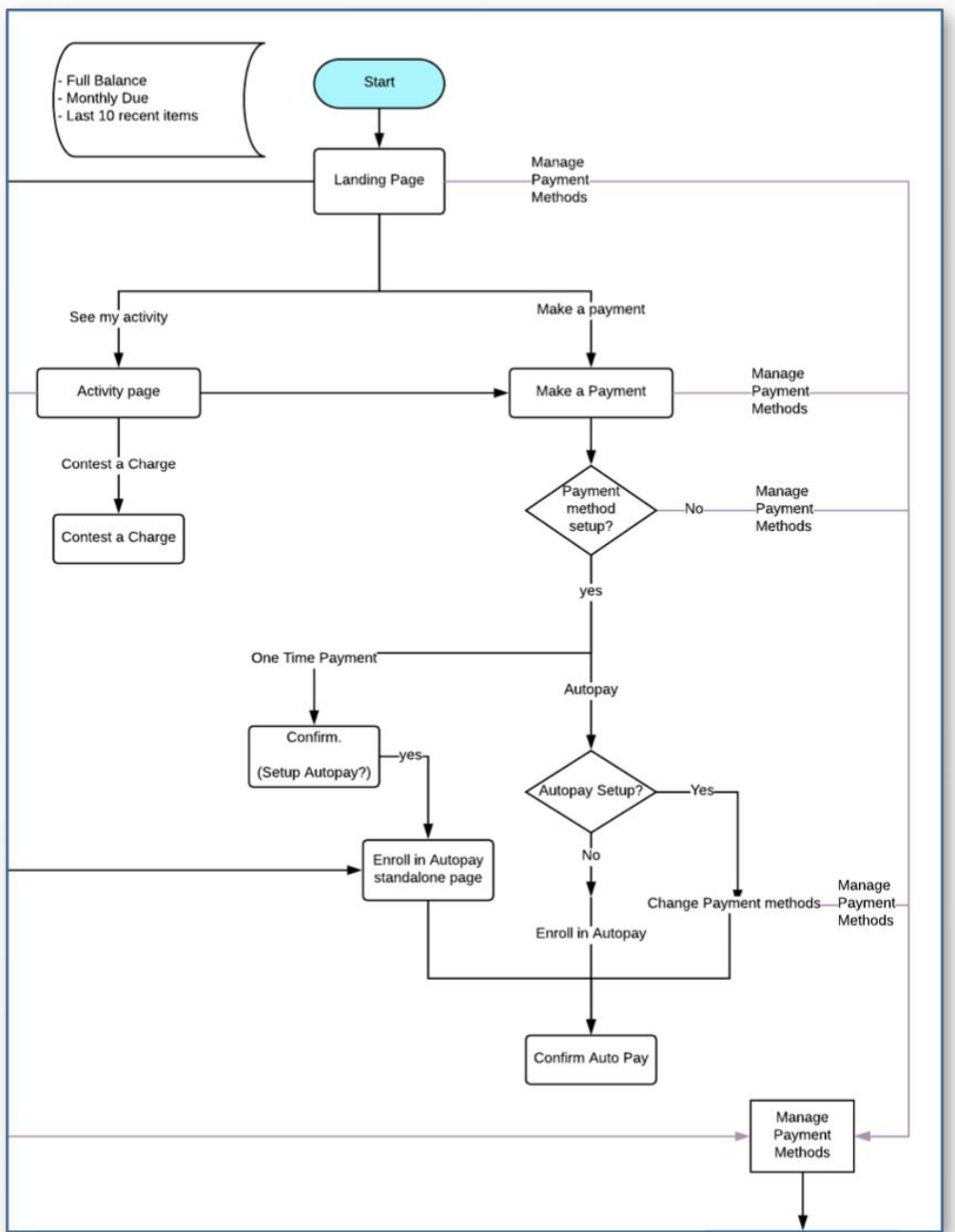
After several attempts to introduce product design to the team, I finally had a breakthrough when I conducted some User Tests to gather unbiased data on the limitations user faced explaining why they just were not paying their bills. The CFO in charge of that organization put me in charge of the project and I was finally given the reigns to do a proper product life cycle.

Pictured here are clockwise:a screenshot before the modernization, a User Flow assessment of the current state, a logic flow of the tech, and results from user testing.

continued on next page...

Select a statement period to view: 06/01/2018 - 07/01/2018				
Previous Balance				
\$203.00				
Charges				
Total Charges: 6				
Charge No.	Charge Date	Due Date	Description	Amount
1020403	06/14/2018	06/14/2018	SA Receivable(BLUE ADVANTAGE JUNE 2018 SEAROLD, JAMES)	\$ 90.00
1020404	06/14/2018	06/14/2018	SA Receivable(BLUE ADVANTAGE JUNE 2018 DALLIN, MELISSA)	\$ 90.00
1020405	06/14/2018	06/14/2018	SA Receivable(BLUE ADVANTAGE JUNE 2018 SEAROLD, JAMES)	\$ 90.00
1020406	06/14/2018	06/14/2018	SA Receivable(BLUE ADVANTAGE JUNE 2018 SEAROLD, JAMES)	\$ 90.00
1020754	06/15/2018	06/15/2018	MLSDW WE MLS/June 8 July	\$ 90.00
1021439	06/29/2018	06/29/2018	MLSDW/June 3rd Quarter Due	\$ 255.00
Charge Subtotal:				
\$721.50				
Payments				
Total Payments: 7				
Payment No.	Payment Date	Payment Type	Description	Amount
1020372	06/01/2018	Deal Transaction	Deal Transaction paid by: 92202001-2018-00012 - 4029 Silver Lake, San Jose, CA 95128 (92202001-2018-00012)	(\$203.00)
1020695	06/20/2018	Deal Transaction	Deal Transaction paid by: 92202001-2017-00738 - 142 Kent Street, San Jose, CA 95128 (92202001-2017-00738)	(\$90.00)
1020696	06/20/2018	Deal Transaction	Deal Transaction paid by: 92202001-2017-00738 - 142 Kent Street, San Jose, CA 95128 (92202001-2017-00738)	(\$90.00)
1020697	06/20/2018	Deal Transaction	Deal Transaction paid by: 92202001-2017-00738 - 142 Kent Street, San Jose, CA 95128 (92202001-2017-00738)	(\$90.00)
1020698	06/20/2018	Deal Transaction	Deal Transaction paid by: 92202001-2017-00738 - 142 Kent Street, San Jose, CA 95128 (92202001-2017-00738)	(\$90.00)
1020699	06/20/2018	Deal Transaction	Deal Transaction paid by: 92202001-2017-00738 - 142 Kent Street, San Jose, CA 95128 (92202001-2017-00738)	(\$90.00)
1020700	06/20/2018	Deal Transaction	Deal Transaction paid by: 92202001-2017-00738 - 142 Kent Street, San Jose, CA 95128 (92202001-2017-00738)	(\$90.00)
Payment Subtotal:				
(\$924.50)				
Statement Balance:				
\$0.00				

User Task Completion				
User 1	Perfect Test!	✓	✓	✓
User 2	Good, payment method missing which the user tried to add, which is great.	✓	✓	✓
User 3	Load Error -- ePay did not load on their machine.	!	!	!
User 4	Password Error	!	!	!
User 5	Password Error	!	!	!
User 6	Good, Payment Error	✓	✓	!
User 7	Load Error -- ePay did not load on their device.	!	!	!



# Case Studies

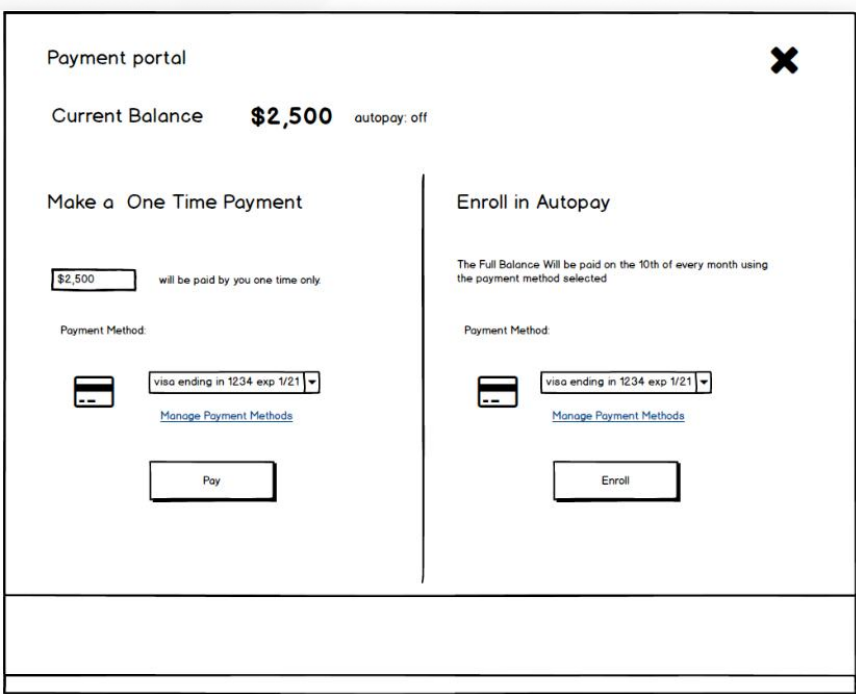
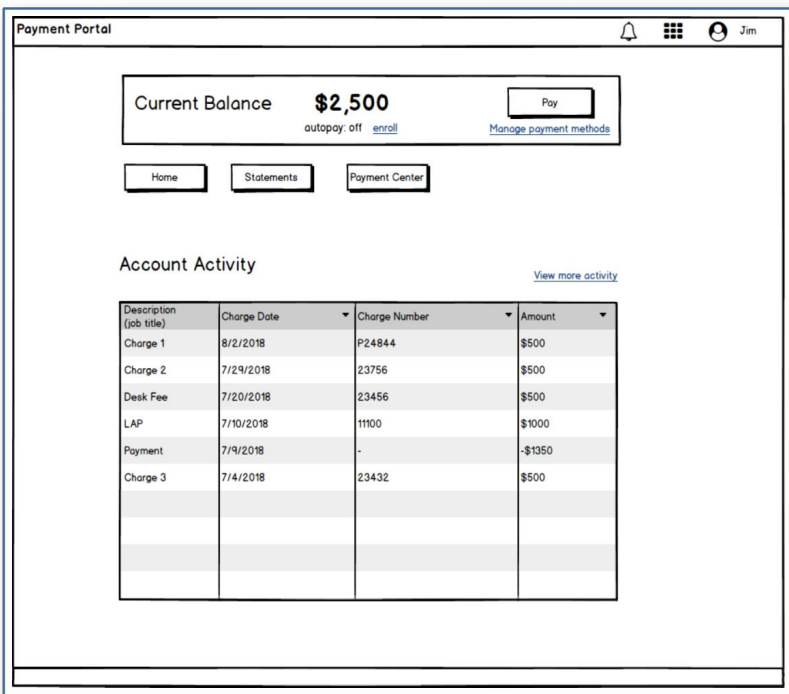
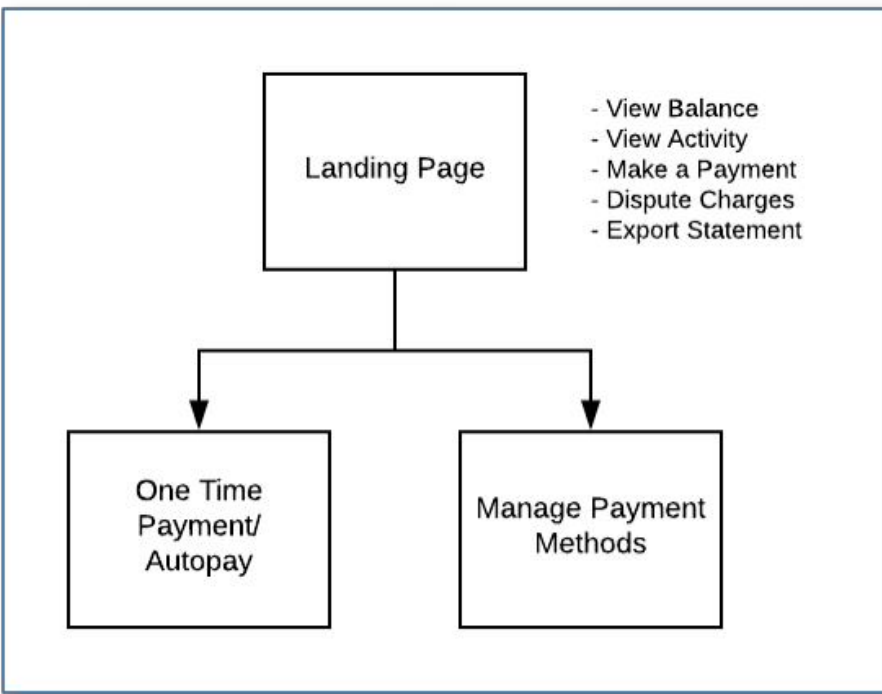
## ePay

I started with reassessing the user flow to be more concise and efficient. This opened up a new paradigm for the business to conduct its finances, leveraging more modern payment methods in line with users expectations - ie no more paper checks nor paying arbitrary individual line items.

Being more account focused now, the low fidelity wireframes highlight the information most relevant to a user: how much money do I owe? and can I easily pay my account?

Finally you can see a screenshot of the final product.

In the first month of release there was an **increase in over \$2 Million of payments made by agents in the first month alone**. According to agents' feedback, it was completely due to the more modern app.



Current Balance: **\$10,000.00**

Autopay: Off

Enroll in Autopay

Payment Due: **\$10,000.00**

Manage Payment Methods

Last Calendar Year

Need Help? Export to PDF View: All

Date	Description	Transaction Number	Amount
1/9/2018	Agent Advance Arrears\OI-4165-2018-001067 - TA674165/Biggs/(13002)Advance Commi	9969563	\$37,000.00
1/11/2018	Agent Advance Arrears\OI-4165-2017-054298 8/14/17	9973115	\$10,000.00
1/12/2018	Credit Memo\Agt wants to investigate the reconciliation of error.	9973989	-\$10,000.00
3/9/2018	Reimburse A/R\Check paid OI 9/6/2017 - PYS	10085964	\$12,690.63
3/9/2018	Agent Advance Arrears\Agt paid 100,000 on 8/4/17 and 90,000 AR created only SEP for 10,000 should have been applied 8/4/17	10085970	\$10,000.00
3/12/2018	Trident Generated Arrears\92943902-2018-00120 - 807 Clinton St Apt 5C Hoboken,NJ 0703029	10088509	\$82.50
3/19/2018	Deal Transaction\Invoice paid by: 92943902-2017-00888 - 1500 Washington St Apt 8Q,Hoboken,NJ 070306738	10099719	-\$82.50

Leave a r



# Case Studies

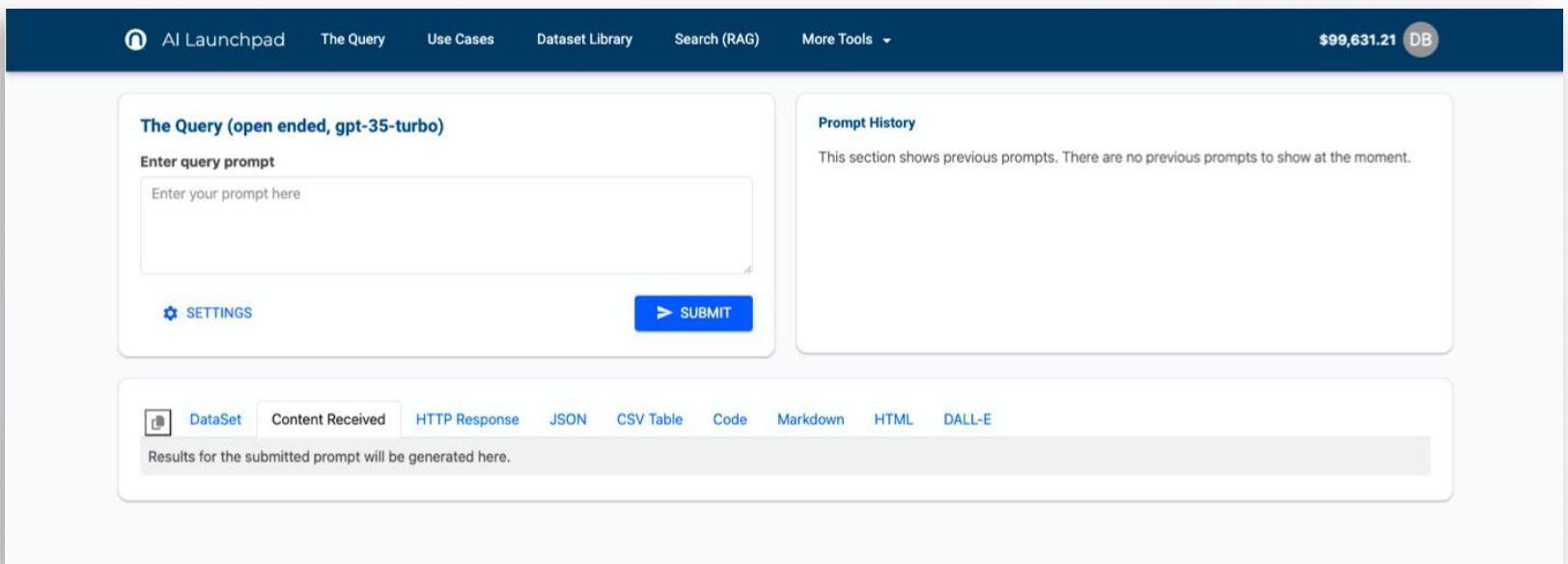
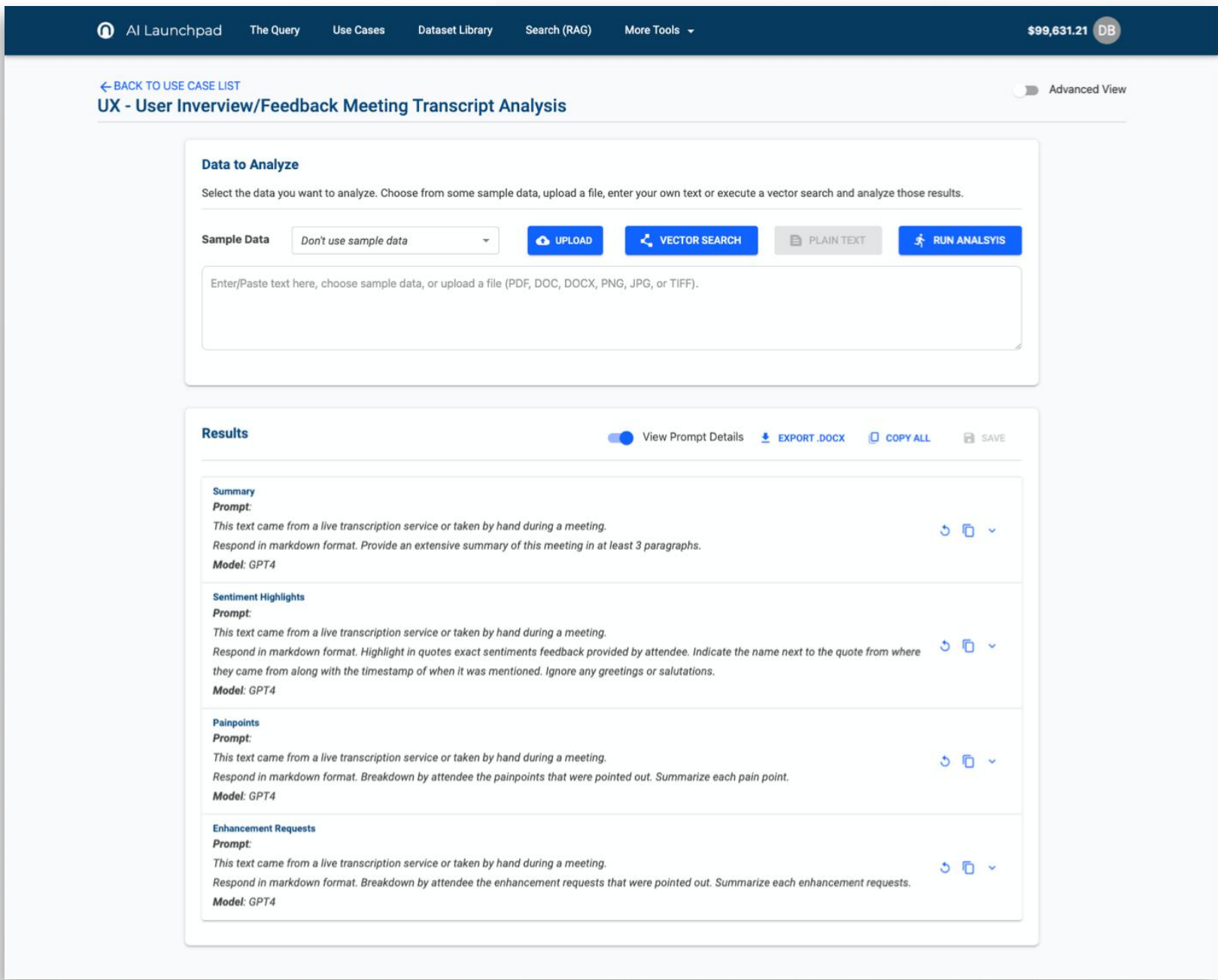
## AI Launchpad

Director of Application Innovations, Paul Galvin single handedly invented the AI Launchpad, Neudesic’s premier Build-your-own OpenAI PaaS. The original version was a very bare bones proof of technology with a gateway to explore more ideas and concepts.

As Lead UX on this product, I made sure the interfaces were redesigned to accommodate less dev oriented users and bring AI Launchpad its own brand. This included artifacts such as one page posters for promotions and web media including a marketing site.

As the project grew I followed in Paul’s footsteps to be the change you want to see, which added the role of AI Launchpad Project Manager to my resume. This allowed me full control to run Agile sprints complete with all the ceremonies from planning to demos.

Ultimately having such an intimate connection with the backlog, Paul and I began to share Product Owner responsibilities until his new duties gave me the opportunity to guide the team as the sole Product Owner/Manager/UX Lead/pre-sales workshop moderator. As this product grew and became unsustainable for one person, my role turned to delegation and innovation leadership which in turn allowed me to run the East Region Innovation Communities - our innovation labs.



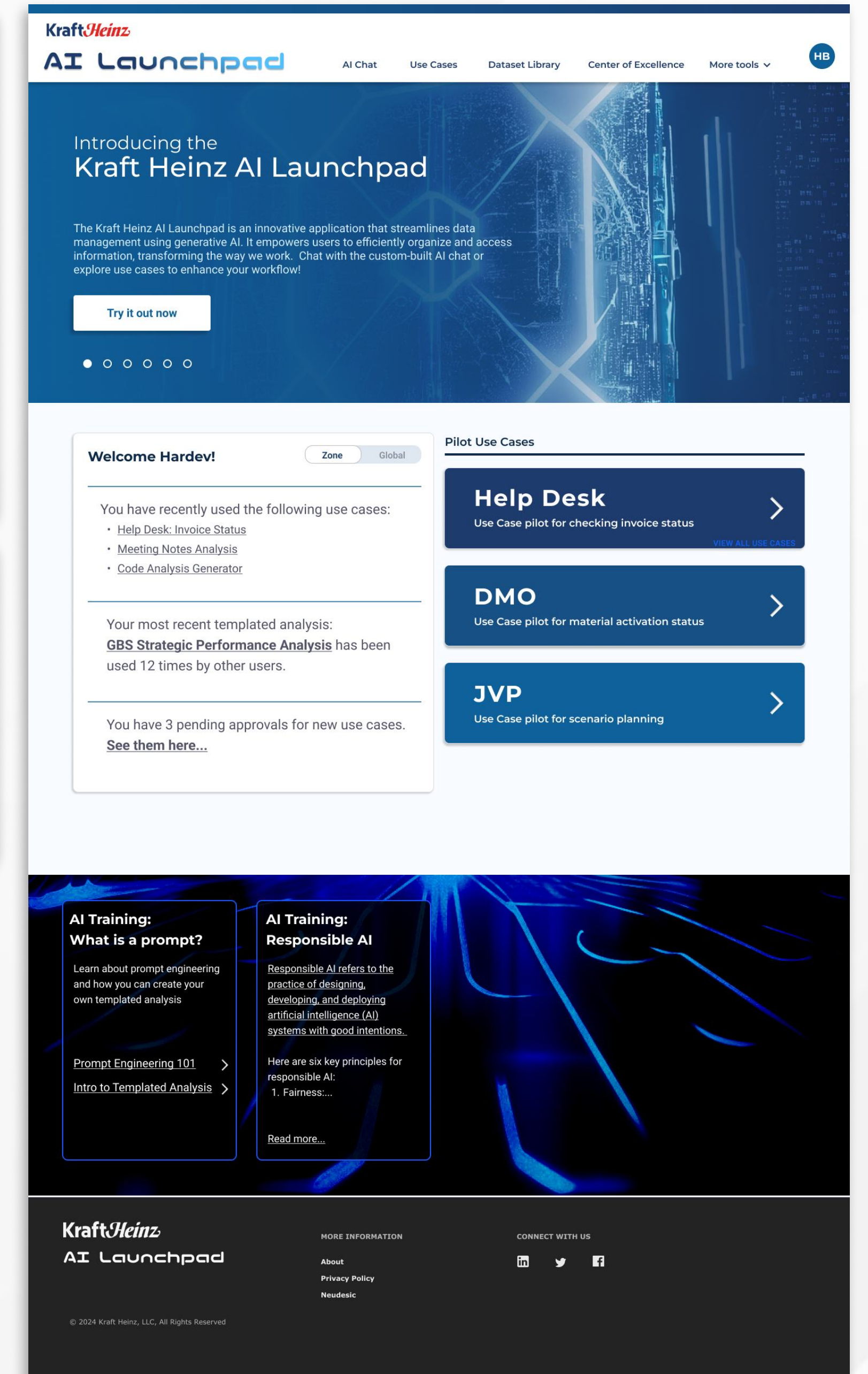
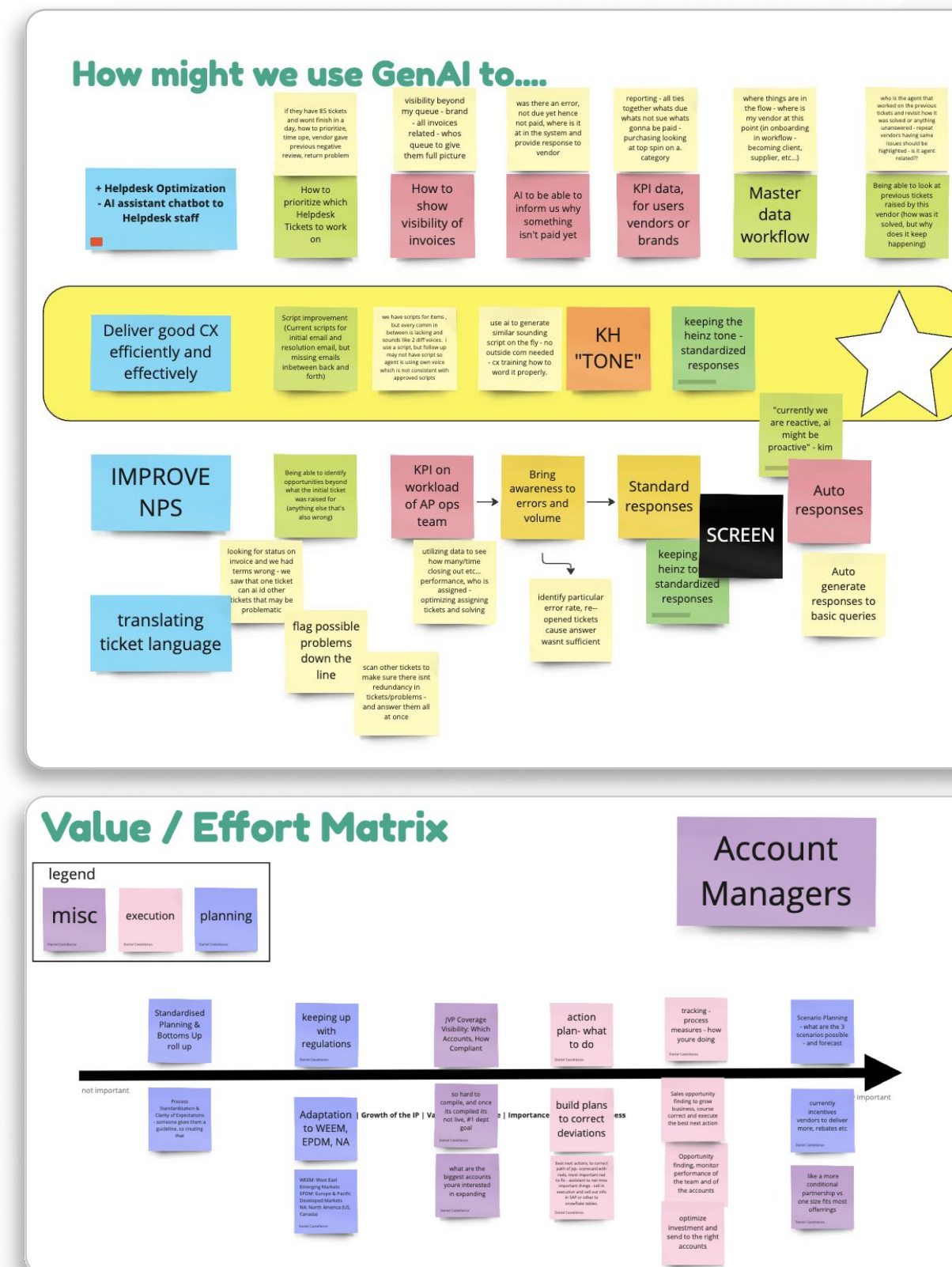


# Case Studies

## AI Launchpad

The most exciting part of the AI Launchpad journey for me was being the Lead Product Designer on the first fully successful deployment of OpenAI to a client.

I was a member of several other pilot projects that created amazing proof of concepts, but Kraft Heinz was able to leverage AI Launchpad for real world use cases with live data. Getting to this delivery required a full suite of Product Design services from workshops to wireframes, and prototyping to front end coding. I had to use my full arsenal to make this project a resounding success.





# Case Studies

## Scaper

Scaper is the brain child of myself and my best friend.

We founded Scaper in the summer of 2018 and continue to grow the company throughout the northern New Jersey area.

Our Mission is to become the nation's premiere on-demand lawn care solution.

Scaper is restarting in 2024 including all new features like the Landscaper Job board and onboarding process.

Check us out at:  
[www.getscaper.com](http://www.getscaper.com)



### Scaper

On-Demand Lawn Care

## 25% OFF

Your first service with promo code: **SCAPER25**

[www.getscaper.com](http://www.getscaper.com)

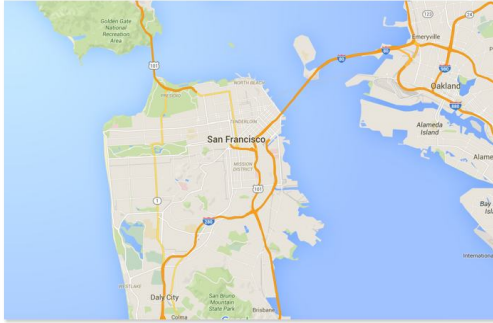
Some restrictions may apply. Limited to one coupon per home. Offer expires October 31, 2018.

Get an Estimate

123 main street, townville, St

Estimate: **\$60**

REQUEST SCAPER NOW



### Request Details

779 Littleton Road, 07054

Address

June 12, 2018 12:34 pm

Request Date Request Time

\$60.00 \$3.96

Price Tax

\$63.96

Total Price

On the way...

Status

1234

VISA

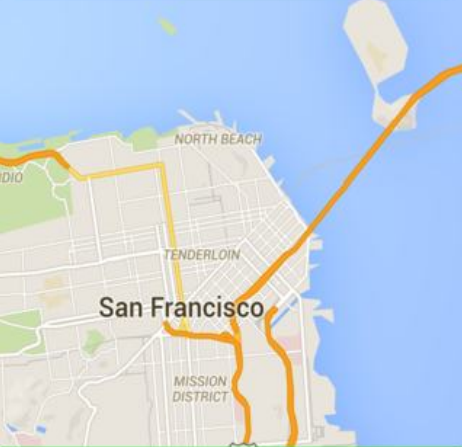
Payment Method

CANCEL

CONTACT US

### Request a Scaper

218 Neue Yrrk Roads, Rutgers NJ



ESTIMATE

**\$60**

Scaper is not available in your area yet. Sign up to learn when Scaper will be in your neighborhood.

SIGN UP

### Scaper Market Segmentation

#### Geographic

- USA
- Suburban
- Rural Country
- Northeast
- Deciduous
- The South - more through winter
- Caribbean
- Central America
- Canada
- Phoenix, Arizona - lawn oasis
- Europe
- Mid West

#### Demographic

- Age - adult
- Male or female
- Gender agnostic
- High income
- medium income
- economical (probably not poor)
- Single
- Married
- Family
- Divorced
- Widowed
- Decision maker
- Secondary decision maker
- Homeowners
- Renters
- Full time employed
- Consultant
- Public servant
- Medical
- All religions
- College educated
- Physical disabilities

#### Psychographic

- Busy Lifestyle
- Wealthy
- Pragmatic - economy, efficiency
- Emotional - image, comfort
- Disgruntled
- Exhausted
- Worried
- Flustered
- Metropolitan
- Care free
- Trusting

#### Behavioural

- Prioritize fun over chores
- Worried about self image
- Upper Class
- Upper Middle Class
- Middle Class
- Semi tech savvy
- Experimental technologist
- Mobile user
- Desktop user
- Quick to save with coupons
- Fine with standardized cost structure
- Promo code seeking
- Has Gmail
- Uses social media

Filter: Likely want a higher income customer

Why?

- Don't have to worry about fine tuning pricing model without large dataset
- Likely to be critical of service quality => good feedback

Constraints

- High Income
- Decision Maker

#### Acorn Structure

Affluent Achievers

- A - Lavish Lifestyles
- B - Executive Wealth
- C - Mature Money

Rising Prosperity

- D - City Sophisticates
- E - Career Climbers

Comfortable Communities

- F - Countryside Communities
- G - Successful Suburbs
- H - Steady Neighborhoods
- I - Comfortable Seniors
- J - Starting Out

1 Exclusive enclaves

2 Metropolitan money

3 Large house luxury

4 Asset rich families

5 Wealthy countryside commuters

6 Financially comfortable families

7 Affluent professionals

8 Prosperous suburban families

9 Well-off edge of towners

10 Better-off villagers

11 Settled suburbs, older people

12 Retired and empty nesters

13 Upmarket downsizers

14 Metropolitan professionals

17 Socialising young renters

18 Career driven young families

19 First time buyers in small, modern homes

20 Mixed metropolitan areas

22 Larger families in rural areas

23 Owner occupiers in small towns and villages

24 Comfortably-off families in modern housing

25 Larger family homes, multi-ethnic areas

26 Semi-professional families, owner occupied neighbourhoods

27 Suburban semi, conventional attitudes

29 Established suburbs, older families

30 Older people, neat and tidy neighbourhoods

31 Smaller houses and starter homes

Filter: Want to do a controlled market test in a local area

Why?

- So we can watch
- So we can provide service ourselves

Constraints

- Stay in Northeast / NJ / 287 Belt

Middletown

Madison

Morristown

Monmouth

Rural

Bedminster

Martinsville

Bridgewater

Somerset

Morris County

Suburban

Somerset County

Rich

Wealthy

Upper Class

Upper Middle Class

Middle Class

\$433,500

# of houses 129,077

Median resident age: 42.4

Private wage or salary: 90%

\$299,900

# of houses 72,094

Median resident age: 41.5

Private wage or salary: 85%

Filter: Consumers available during the daytime

Why?

- So we can contact them throughout the request process
- Requests aren't sitting in a queue

Constraints

- 9-5 workers are less available
- Works from home

Beachhead Market

Homeowner Hailey



### Scaper

We'll cut your grass now!

[www.getscaper.com](http://www.getscaper.com)

8" Municipal Violation

5.0" High-Top Sneaker

3.0" Tall Grass

1.75" Residential Lawn

1.25" Height of Golf Rough

.125" Height of Golf Green

18