

# **UX Solution Examples**

**(company name redacted)**

**DM - 2021**

# Example 1

## Problem

Needed alternate solution to the use of color, as the amount of companies in the list grew larger, thus nullifying the use of color as an effective differentiator.



## Proposal

Designed and proposed 3 versions of well-known initials for company states/names to provide text-based alternative that scales.



## Solution

Worked with POs to arrive at this design, as it doesn't rely on color at all, lessening the cognitive load on users. It also provides a meaningful, accessible secondary indicator.



# Example 2

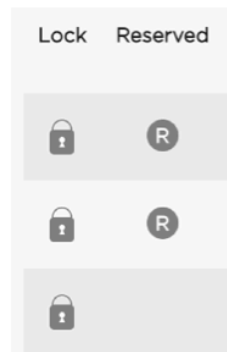
## Problem

Iconography and layout weren't intuitive, nor were the color differentiators for different companies



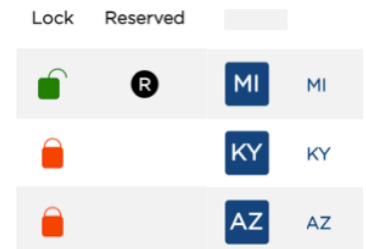
## Proposal

Proposed clearly defined icons for open/closed and reserved, in conjunction with state initials icons



## Solution

Worked with POs to arrive at this design that more clearly calls out lock status. Result was improved layout, spacing and readability of the screen.



# Example 3

## Problem

Survey communication options needs to be designed based on this simple wireframe (created by a business analyst) and domain knowledge collected from product owner. Screens must reflect screens according to the logic of survey opt-ins, opt-outs and communication option changes. The analyst's wireframe was a Powerpoint file with multiple slides to describe every use case they'd identified for this process.

Joe Smith 555-555-5555  
444-444-4444  
Joe@yahoo.com

Jill Smith 333-333-3333  
444-444-4444  
Joe@Yahoo.com

### Log for Jill

7/2/21 – Jill is opted in for emails  
7/4/21 – Jill is opted in out for emails  
7/4/21 – Jill is opted in for text @ 333-333-3333  
7/7/21 – Jill is **implicitly** opted in for phone 444-444-4444

### Questionnaire

Jill Smith ☒ Receive Texts 444-444-4444

☐ Receive Email

7/7/21– Jill sees that she has been implicitly opted in to receive texts at phone 444-444-4444. She is otherwise opted in to receive texts at 333-333-3333. Jill does not opt out of receiving texts for this survey at 444-444-4444.

Jill will receive this survey (and only this survey) at 444-444-4444. All other communications and surveys will be sent to 333-333-3333

# Example 3

## Proposal

### option 1

Shows both subscriber and dependent in one view and allows for opt-in checkbox selections and the ability to toggle which phone number the customer would like to use for that specific item.

Member Portal

Joe Smith

☒ Receive Texts

555-555-5555

☐ Receive Email

Joe@yahoo.com

7/4/21 - Joe is opted out of email because person who shared email opted out

7/3/21 - Joe is opted in for email

7/3/21 - Joe is opted in for text @555-555-5555

Jill Smith

☐ Receive Texts

444-444-4444

☒ Receive Email

Joe@yahoo.com

☐ Receive Texts

333-333-3333

7/10/21 - Jill is opted out for receiving texts via implicit opt ins

7/9/21 - Jill is opted out for texts

7/7/21 - Jill is implicitly opted in for phone 444-444-4444

7/4/21 - Jill is opted in out for emails

7/4/21 - Jill is opted in for text @ 333-333-3333

7/2/21 - Jill is opted in for emails

# Example 3

## Proposal

### option 2

Also shows both subscriber and dependent but presents the information in a timeline-style manner, which incorporates the activity log in a more chronological way. It also shows which status the communication options were in at the time of the action.

Member Portal

Jill Smith

7/2/21 – Jill is opted in for emails

☐ Receive Texts

Select a phone number ▼

☒ Receive Email

Joe@yahoo.com ▼

Joe Smith

7/3/21 – Joe is opted in for email  
7/3/21 – Joe is opted in for text @555-555-5555

☒ Receive Texts

555-555-5555 ▼

☒ Receive Email

Joe@yahoo.com ▼

Jill Smith

7/4/21 – Jill is opted in out for emails  
7/4/21 – Jill is opted in for text @ 333-333-3333

☒ Receive Texts

333-333-3333 ▼

☒ Receive Email

Joe@yahoo.com ▼

# Example 3

## Proposal

### option 3

This only shows one person at a time, yet includes a more comprehensive single view of the person's status. Clear section delineation is achieved by subtle increases in spacing. Inline editing available for communication options.

The screenshot shows a 'Member Portal' window with a blue header and a close button (X) in the top right corner. The main content area is white and contains the following sections:

- Joe Smith**: The member's name is displayed at the top of the main content area.
- SURVEYS**: A section header followed by a link to 'Health Questionnaire Survey'.
- ACTIVITY LOG**: A section header followed by three entries:
  - 7/4/21 - Joe is opted out of email because person who shared email opted out
  - 7/3/21 - Joe is opted in for email
  - 7/3/21 - Joe is opted in for text for 444-444-4444
- COMMUNICATION OPTIONS**: A section header followed by three rows of options:
  - ☒ Receive Texts: 444-444-4444 (with a dropdown arrow)
  - ☒ Receive Phone call: 555-555-5555 (with a dropdown arrow)
  - ☐ Receive Email: Joe@yahoo.com (with a dropdown arrow)
- Opt-In (explicit)**: A checkbox followed by a link to 'General Marketing Material'.
- SAVE**: A blue button located at the bottom right of the main content area.

# Example 3

## Solution

Survey types are clearly labeled.

Phone/text numbers positioned near survey for context.

Used a more concise link style dropdown instead of Select Menu

Added toggle for each section, including a toggle between member types.

Added a 'more' button instead of the scrollbar treatment as a more elegant solution.

The screenshot shows a 'Member Portal' interface for a user named Jill Smith, who is a dependent. The interface is organized into several sections with expandable/collapsible headers. The 'COMMUNICATION PREFERENCES' section has three items: 'Texts' (unchecked, 333-333-3333), 'Phone' (checked, 444-444-4444), and 'Email' (unchecked, joe@yahoo.com). The 'IMPLIED CONSENT SURVEYS' section has two items: 'Health Questionnaire' (333-333-3333) and 'General Marketing Material' (joe@yahoo.com). The 'SURVEYS' section lists three items: 'Healthy', 'Example Survey', and 'Test Example Questionnaire'. Below these is an 'ACTIVITY LOG' section with a list of events: '7/9/21 Implicitly opted out for texts (including implicit opt ins)', '7/7/21 Implicitly opted in for phone 444-444-4444', '7/4/21 Opted in out for emails', '7/4/21 Opted out for text @ 333-333-3333', and '7/2/21 Opted in for...'. A 'MORE...' button is next to the last entry. A 'SAVE' button is located at the bottom right of the form.

SUBGROUP	GROUP NAME	MEMBER	RELATIONSHIP	ELIGIBILITY STATUS
		Jill Smith	DEPENDENT	

### Member Portal

**Jill Smith**  
DEPENDENT ▾

**COMMUNICATION PREFERENCES** ^

☐ Texts 333-333-3333  
☒ Phone 444-444-4444  
☐ Email joe@yahoo.com

**IMPLIED CONSENT SURVEYS** ^

Health Questionnaire 333-333-3333 ▾  
General Marketing Material joe@yahoo.com ▾

**SURVEYS** ^

Healthy  
Example Survey  
Test Example Questionnaire

**ACTIVITY LOG** ^

7/9/21 Implicitly opted out for texts (including implicit opt ins)  
7/7/21 Implicitly opted in for phone 444-444-4444  
7/4/21 Opted in out for emails  
7/4/21 Opted out for text @ 333-333-3333  
7/2/21 Opted in for... [MORE...](#)

[SAVE](#)