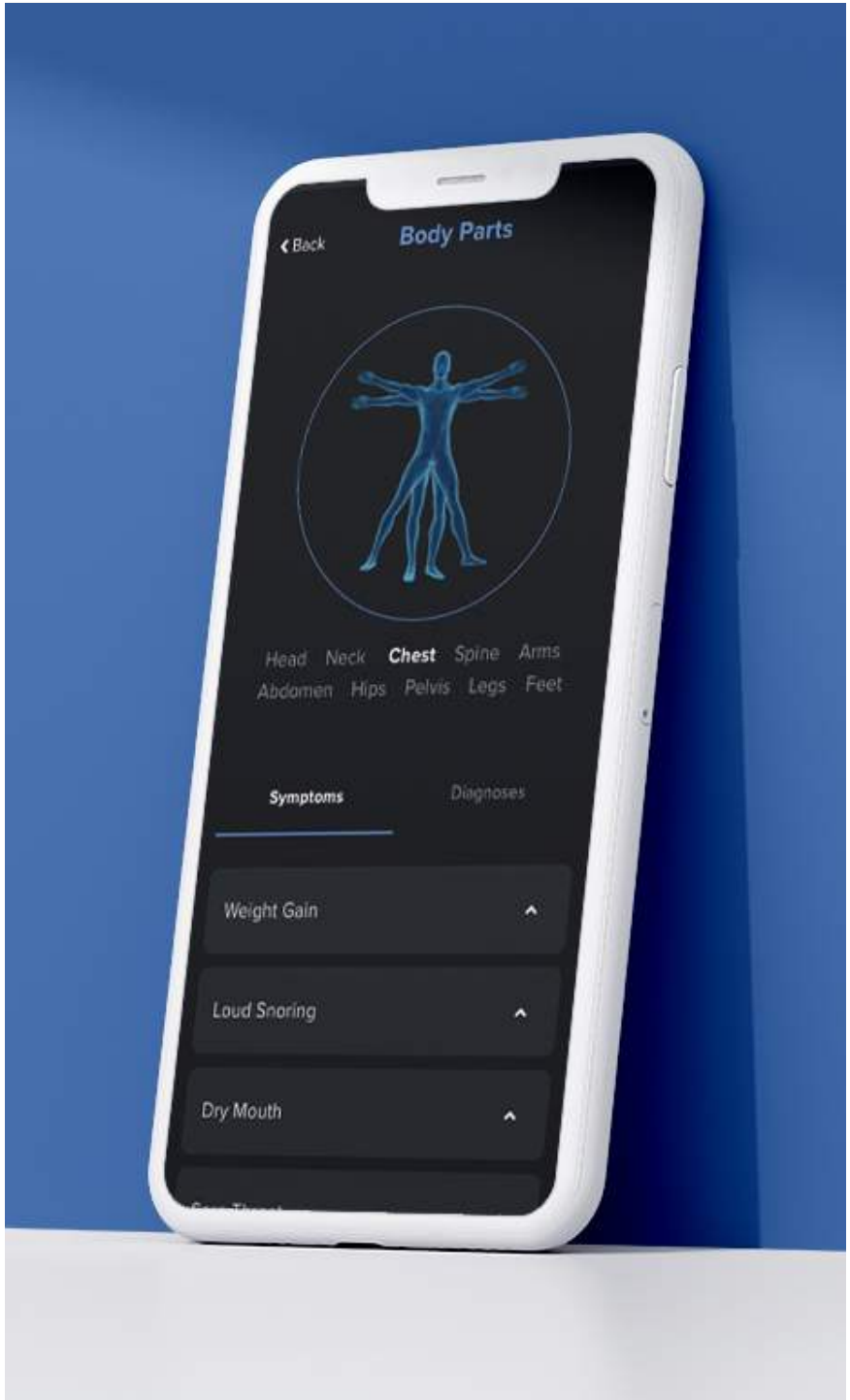
James Rountree

I am a Product Designer and Developer passionate about solving complex user experience challenges.



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Da Vinci

U.S military veterans need help obtaining monetary compensation for disabilities sustained from their war efforts. In hopes to create an effective solution for this problem, we created Da Vinci: a scalable web based platform intended to help Veterans obtain the medical benefits they deserve in the shortest period of time.

The following case study was assembled by myself and my teammate, Hugo Ramos

His work can be seen at **hugoramos.co**

Project descriptions, proprietary information, and business assets have been redacted or altered to protect company privacy.

Challenges and Goals

UX Challenge

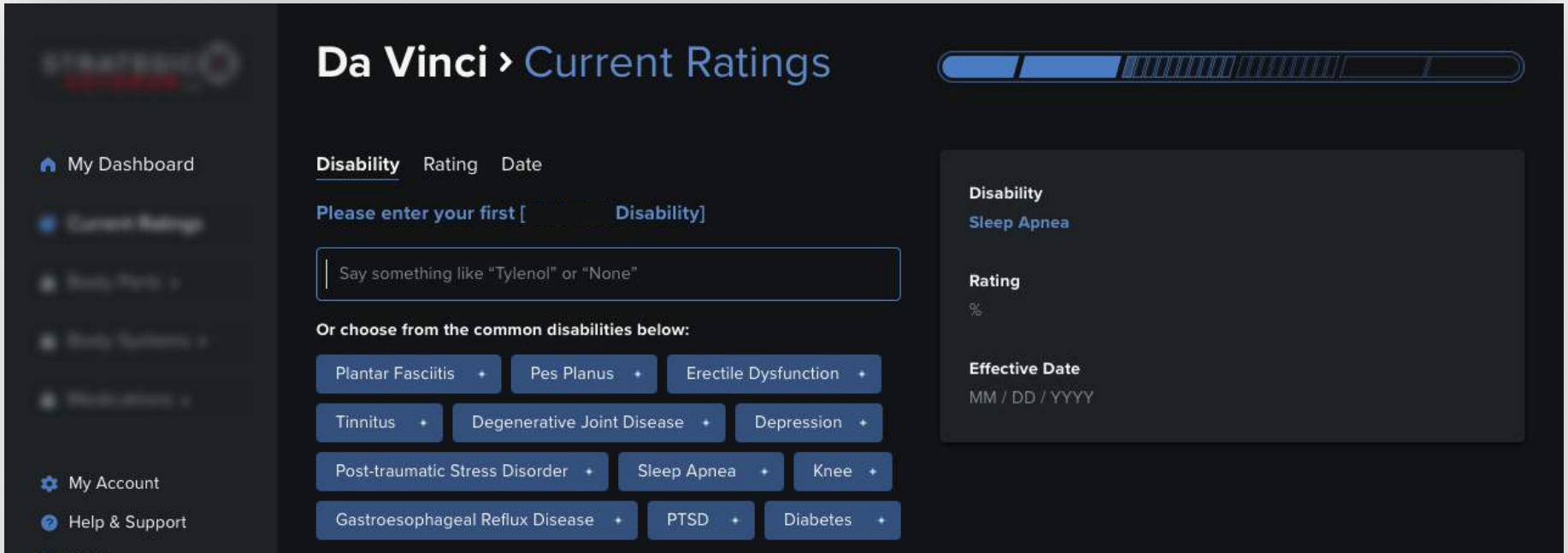
Some of the medical quistionaires clients must fill out can be hundreds of questions long. One of the biggest challenges is breaking up the long monotonous forms with medical terms. Another significant challenge is creating a central hub where clients can check and intuitively updated disabilities for further service connections.

UX Goals

Translate and display complex medical terms into laymens terms so its easier for users to comprehend having no medical background. Creating a concise and easy to comprehend summary of potential connected disabilies that users can use for reference in filing for future benefits.

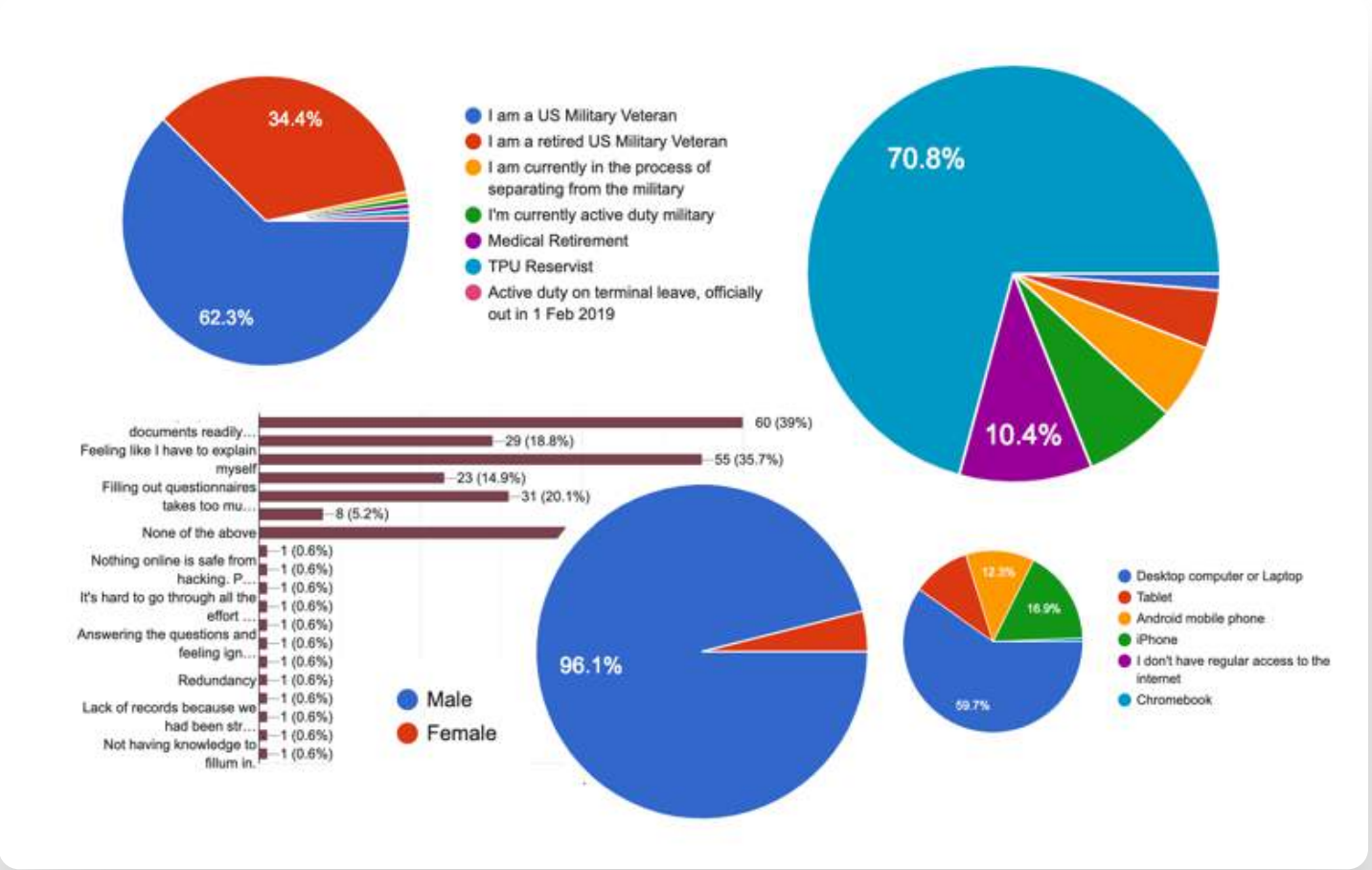
Responsive First

When meeting with product owners one core feature was for veterans to have full function support on mobile devices. From the inital wireframes we began designing with the responsive first approach, accounting for screen sizes everything from an iPhone 5 all the way up to a full television.



Research

To learn more about our user base, we sent out a brief survey to gather qualitative and quantitative data to help form the basis of our design process. We obtained 154 responses from US military veterans and received key insights that would help us understand the problem from the user's perspective.



User Empathy

Based on our research, we decided to create user personas to form a deeper understanding of our user-base in order to meet their specific needs. Predicated upon demographics, personality type, and other psychographic information, we came up with three archetypes that met the criteria of the user we're designing for.

Vietnam Vince

Retired US Veteran

" I'm at least keyboard literate, so I rather deal with a live person than a computer screen."

Gender: Male
Age: 55
Military Status: Retired Veteran
Patient Conditions:

- High Blood Pressure, Depression, PTSD, Diabetes (Agent Orange Exposure)

VA Services Utilized:

- My HealtheVet: secure messaging, Rx refill, blue button, lab results
- Peer Counseling Services
- Smoking cessation services
- Treatment for Diabetes from Agent Orange Exposure

Characteristics:

- Cautious, Opinionated, Loyal, and Skeptical

Desires:

- I want to be in control of my medications
- Make sure somone responds to me (Secure messaging and appoitments)
- Let me see all of my health records

Closest Relationships:

- Grand children
- Other Veterans

Technology Devices:

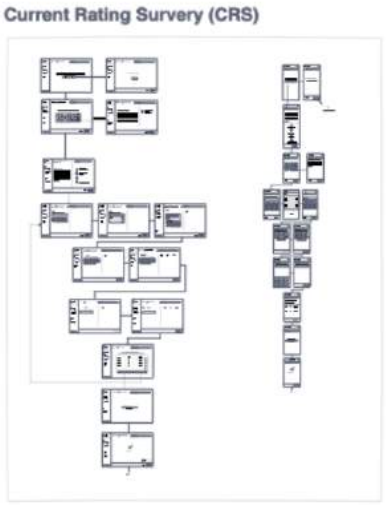
- IPhone5 (Smartphone)
- PC (Home Desktop)
- Landline

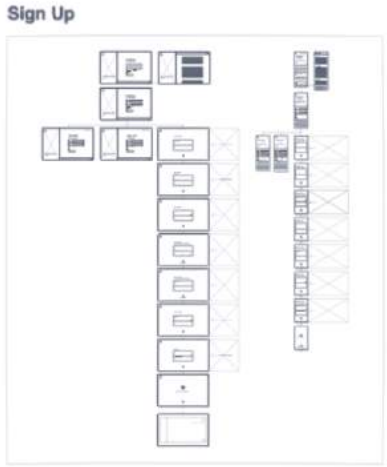
Technology Pain Points:

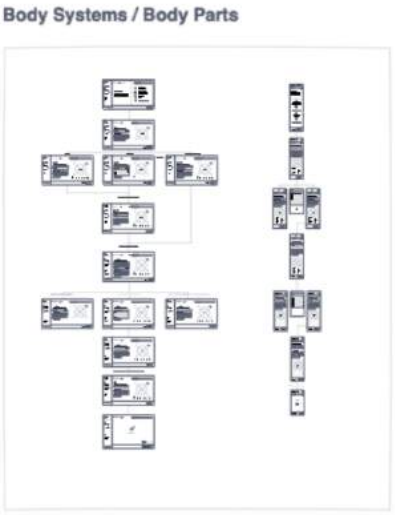
- Don't feel that apps and websites are secure
- Problems with sign in
- Too much information on VA websites

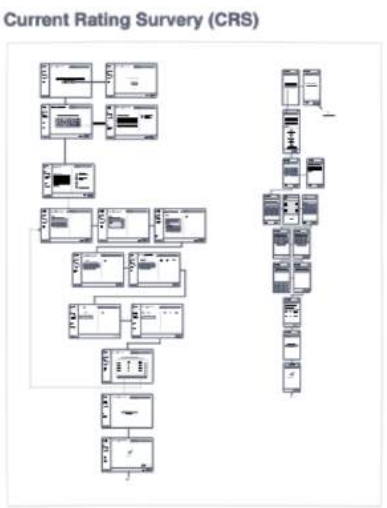
Quick Concept

We began creating the general layout of the application based on specific requirements and must-haves that were imperative for the first version of Da Vinci. We collaborated on Invision's Freehand for the first round of concept iterations and made sure to follow Usability and human design centered principles and best practices along the way.





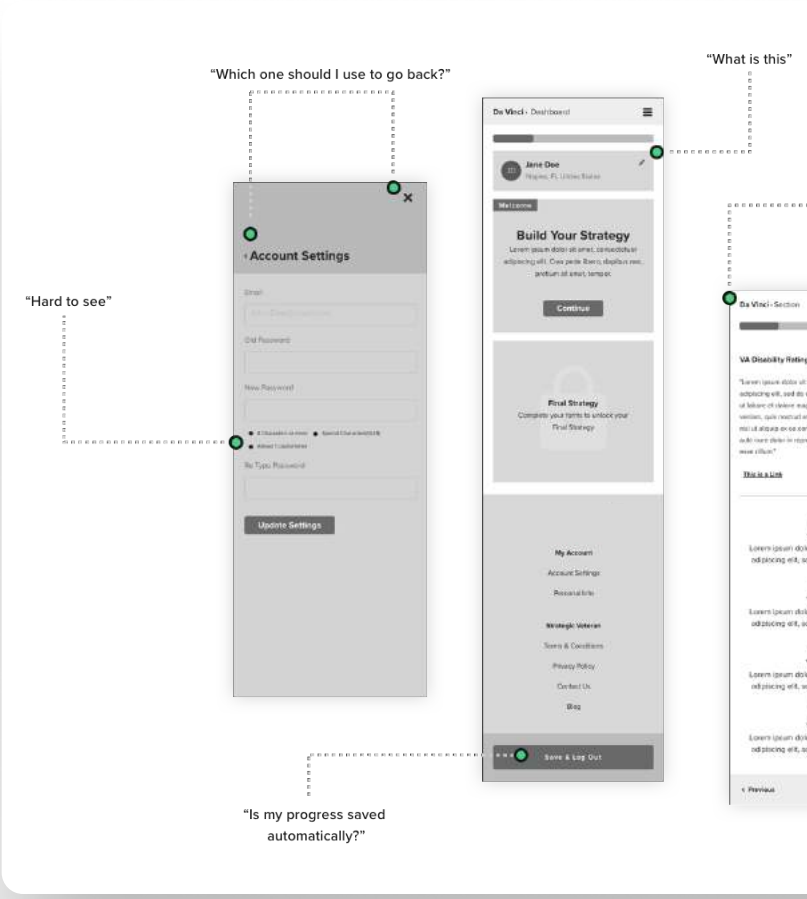


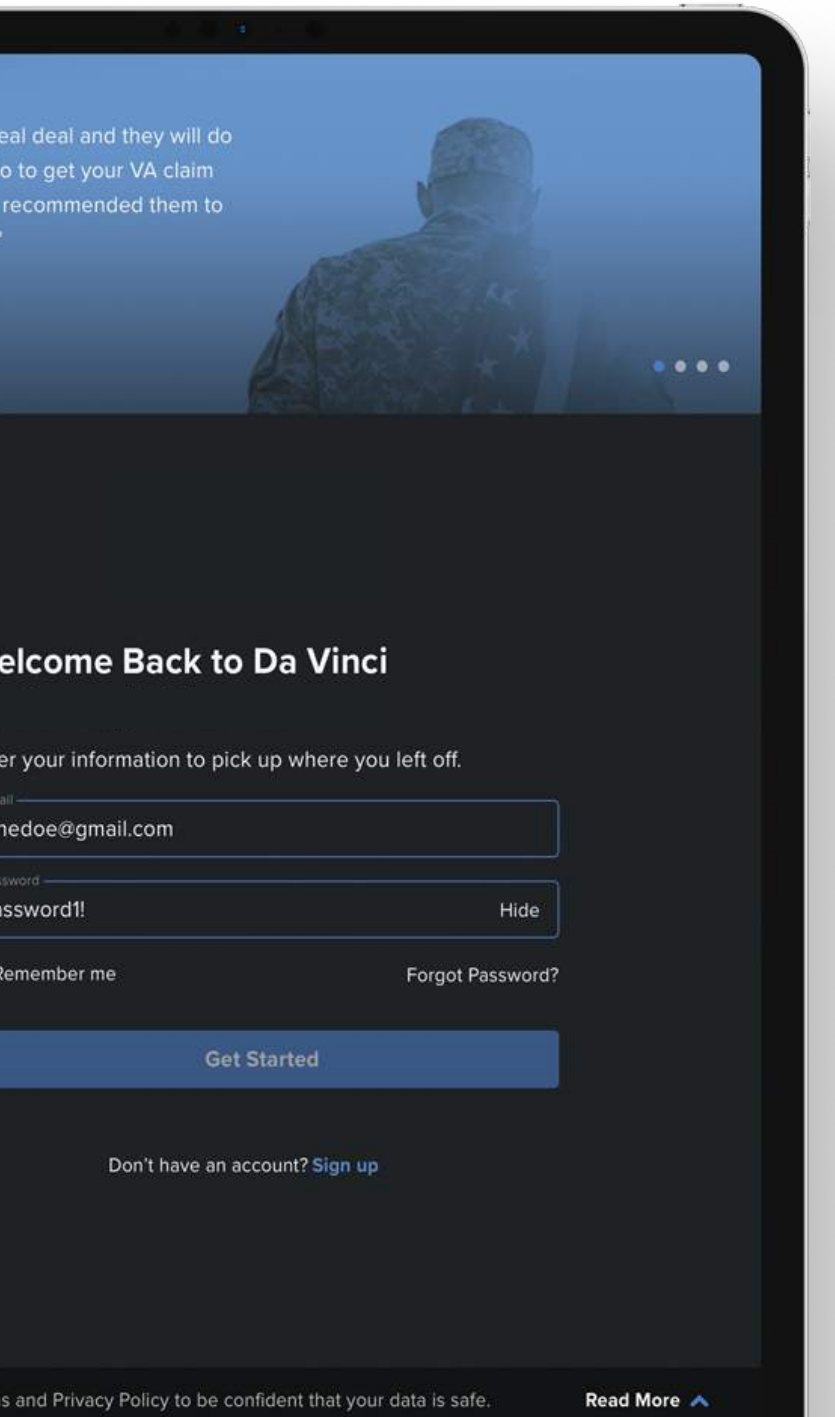


Renovation

After ensuring the low-fidelity wireframes met all user and product requirements and scenarios, we converted our initial concept drawings into medium resolution wireframes in preparation for our first usability test.

In following a strict agile process, we made all necessary changes before committing time and energy into adding styles, icons and visual elements to the application. However, we did create symbols out of the elements that were validated from our testing sessions, so when we were ready to move into styling it was done globally, saving us a great deal of time and energy.





Outcome

After creating a high resolution prototype using Sketch and Flinto, we conducted in depth usability tests to further improve the application. It was imperative for us to gain feedback from stakeholders, customer service and sales representatives, and other key personnel within our organization that have hands on experience helping military veterans every day. This was to ensure that every feature made sense and adhered to and/or improved upon the processes that is followed on a daily basis while helping military veterans get the disability compensation they deserve.

Propriety Algorithm

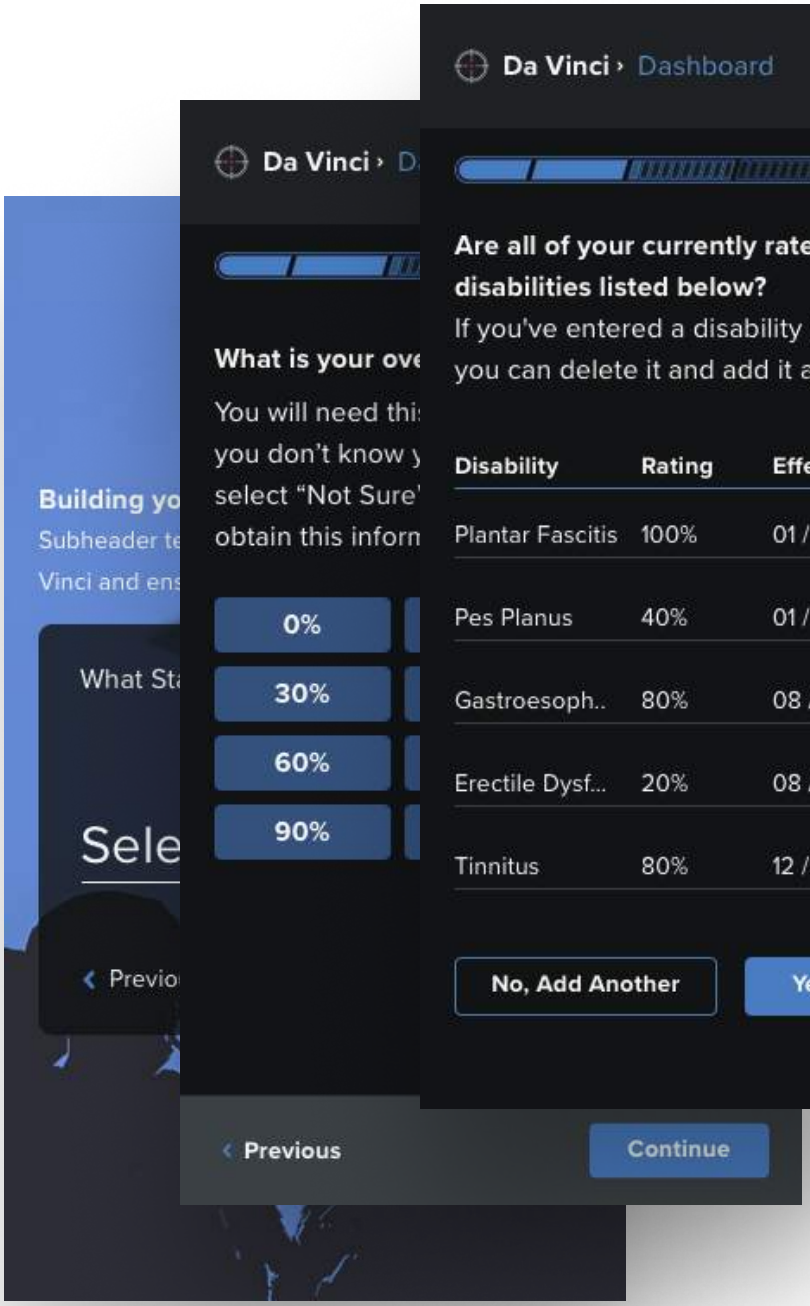
Our proprietary algorithm allows us to help more veterans by simplifying and speeding up the discovery process in a scalable way.

Easy to use Questionnaire

Our intuitive questionnaire simplifies the process for the user by auto generating the top 10 most common answers.

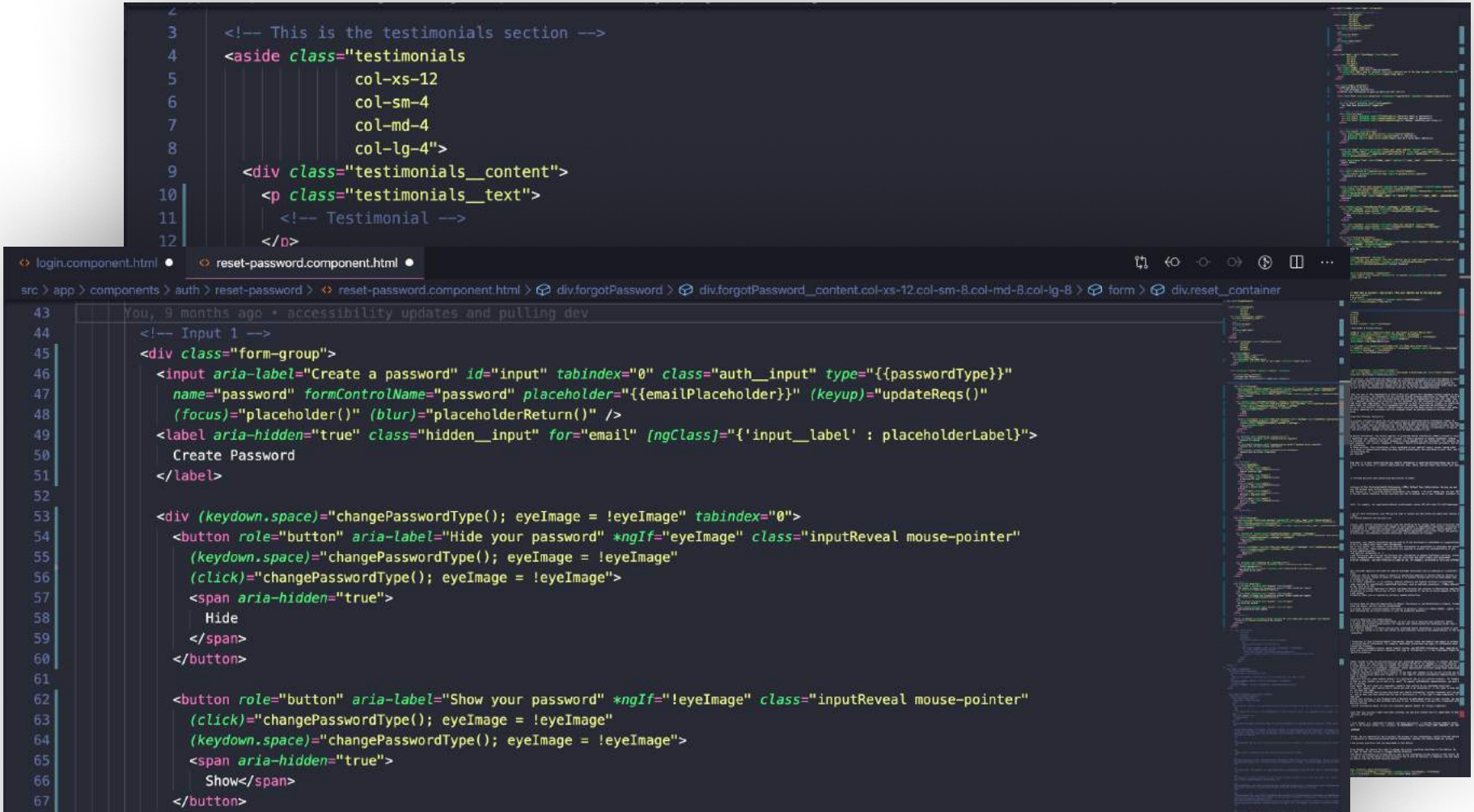
Generate Final Report

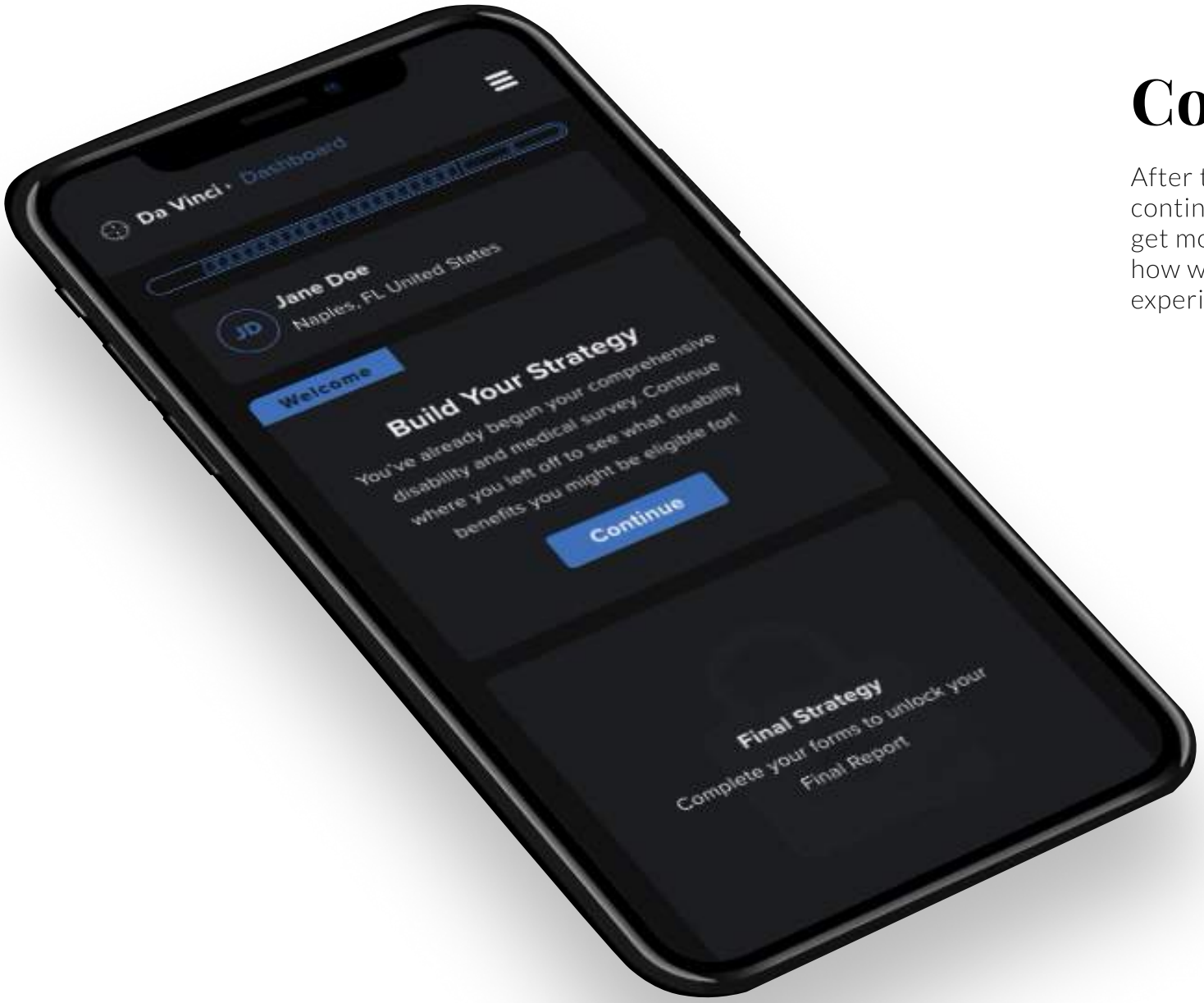
After recieving input from users, our application synthesizes all the data and automatically generates a report of potential ratings that can be downloaded as a PDF.



Development

We began development after extensive user testing via clickable protoypes. Utilizing Angular Cli 6 and using seperate components we were able to independtly work on parts of the application without overriding eachothers styling and functions. With global styling files in SCSS we were able to use variables and Mixins so that we were not recreating styling and classes that might appear in multiple parts of the application already written by our team. It made development faster and the front end styling more consistant, it was incredibly benifital because we never had to rewrite visual components.





Conclusion

After the initial release, we will continue researching and testing to get more feedback and learn more on how we can create the most optimal experience for our users.

VACP

VA Claim Pros serves United States military veterans by providing them with professional medical disability consultation services. The purpose of this site is to serve as a landing page for potential clients and existing clients to learn more about the company and set appointments to meet with a VACP representative.

The following case study was assembled by myself and my teammate, Hugo Ramos

His work can be seen at **hugoramos.co**

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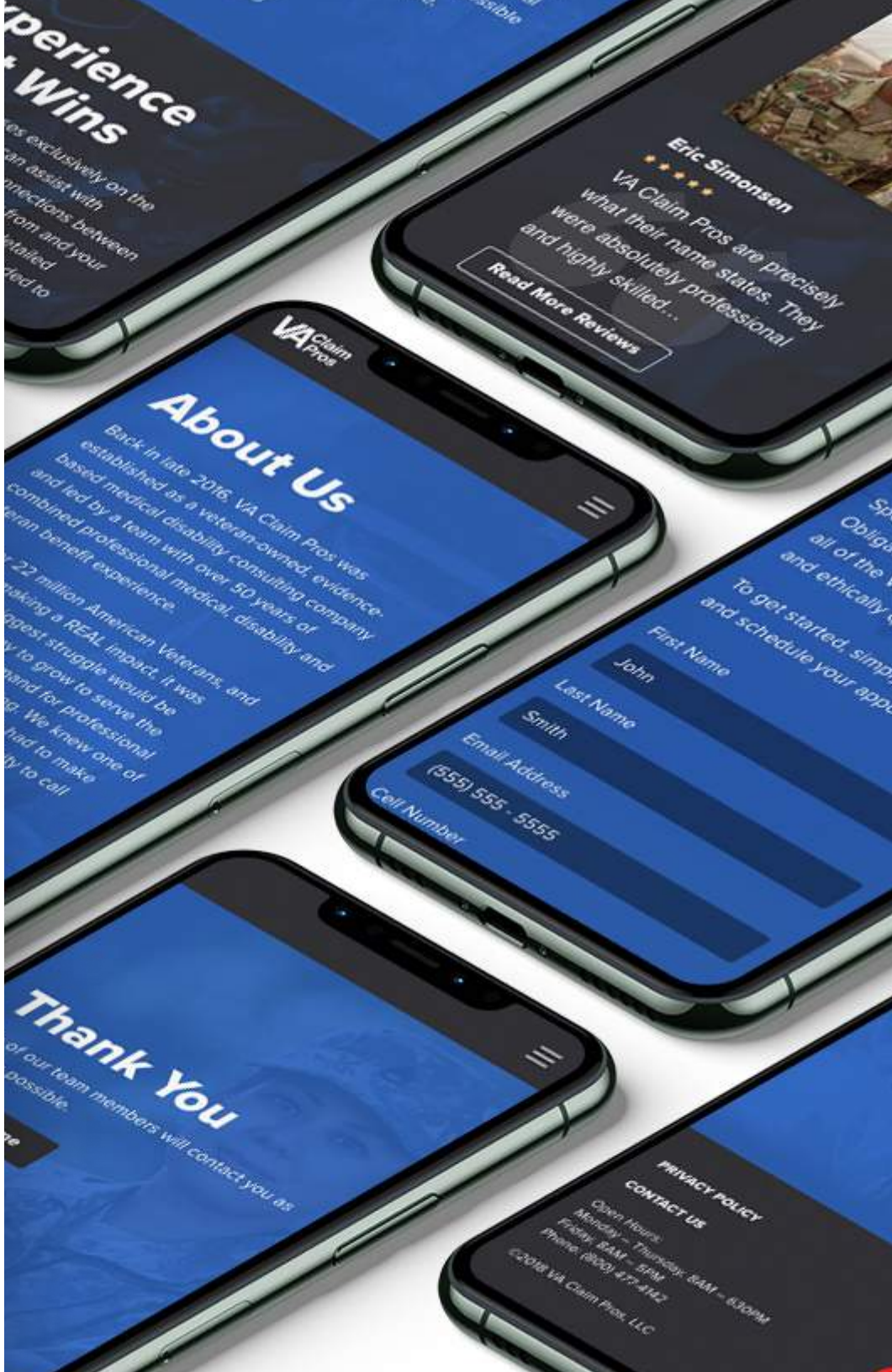


Process

- **1. Research**
  - Industry Research
  - User Research
- **2. Iteration**
  - Rapid Prototyping
  - High fidelity
- **3. Testing**
  - Accessibility
  - Usability Testing
- **4. Validation**
  - User Testing
  - KPI's

Problem Statement

"Veterans need help obtaining the medical disability benefits they were promised, however they feel misled and ignored. They need a reliable, responsive resource to help them achieve their goals."

Project Duration

From inital scope meeting to final product was three moths in total. User acceptance testing contined for two additional weeks.

Team

Hugo Ramos
Product Designer

Andrew Nicholl
Sr. Product Designer

James Rountree
Product Designer

Luke Pate
Lead Software Engineer

Tory Minars
Project Manager

Lane Holcombe
Sr. Software Engineer

User Journey Diagram

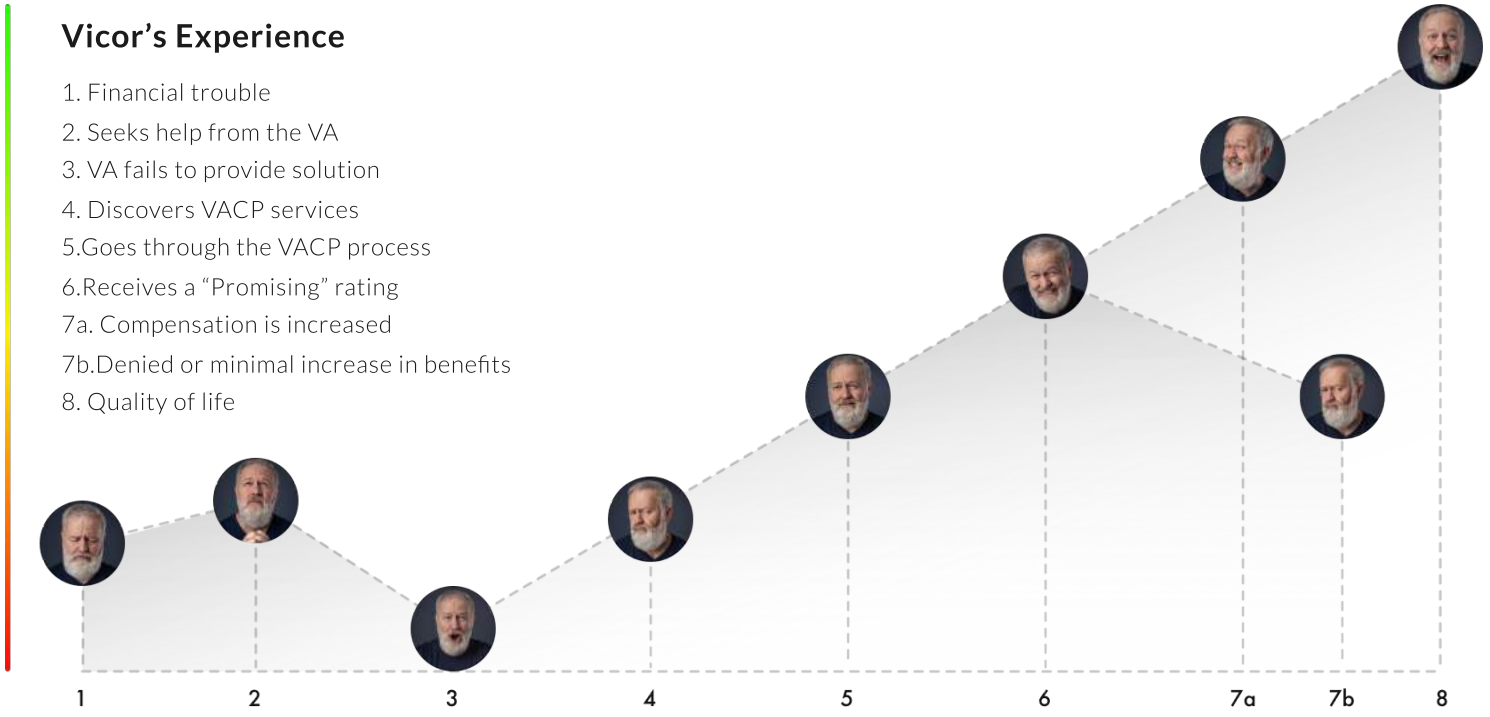
User journey diagrams allow us to be more empathic while designing for our user because we have a better understanding of the specific frustrations they go through before they discover our product and provides us with more awareness of frustrations that may potentially arise in the future.

Goals and Expectations

Victor's primary goal is to increase his income so he can take care of himself and his familly after service. He expects to receive the help a veteran who has served their country deserves

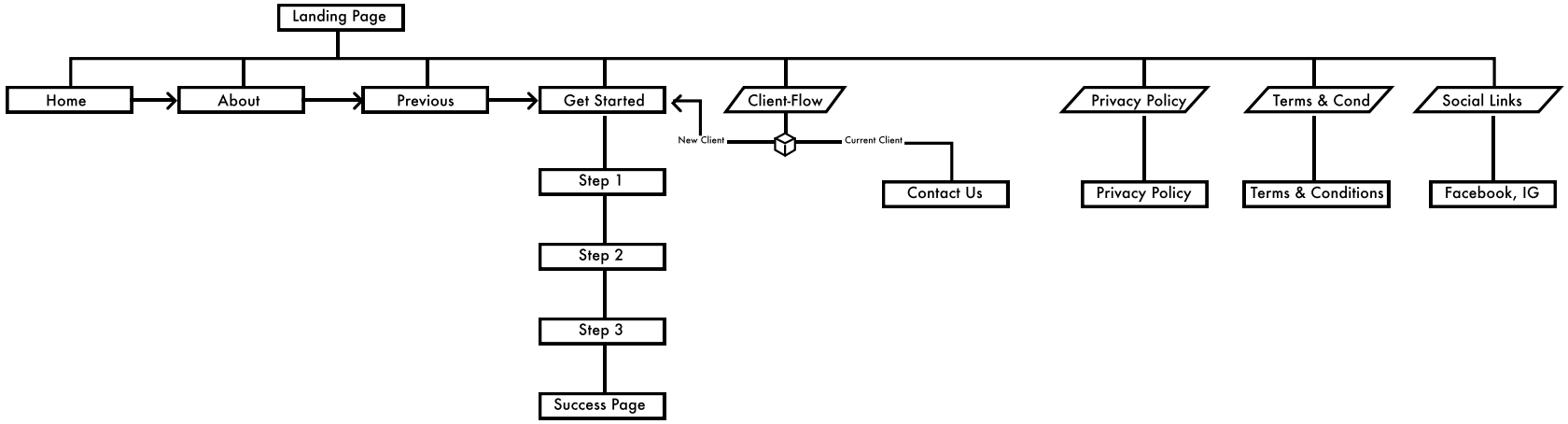
Vicor's Experience

1. Financial trouble
2. Seeks help from the VA
3. VA fails to provide solution
4. Discovers VACP services
5.Goes through the VACP process
6.Receives a "Promising" rating
7a. Compensation is increased
7b.Denied or minimal increase in benefits
8. Quality of life



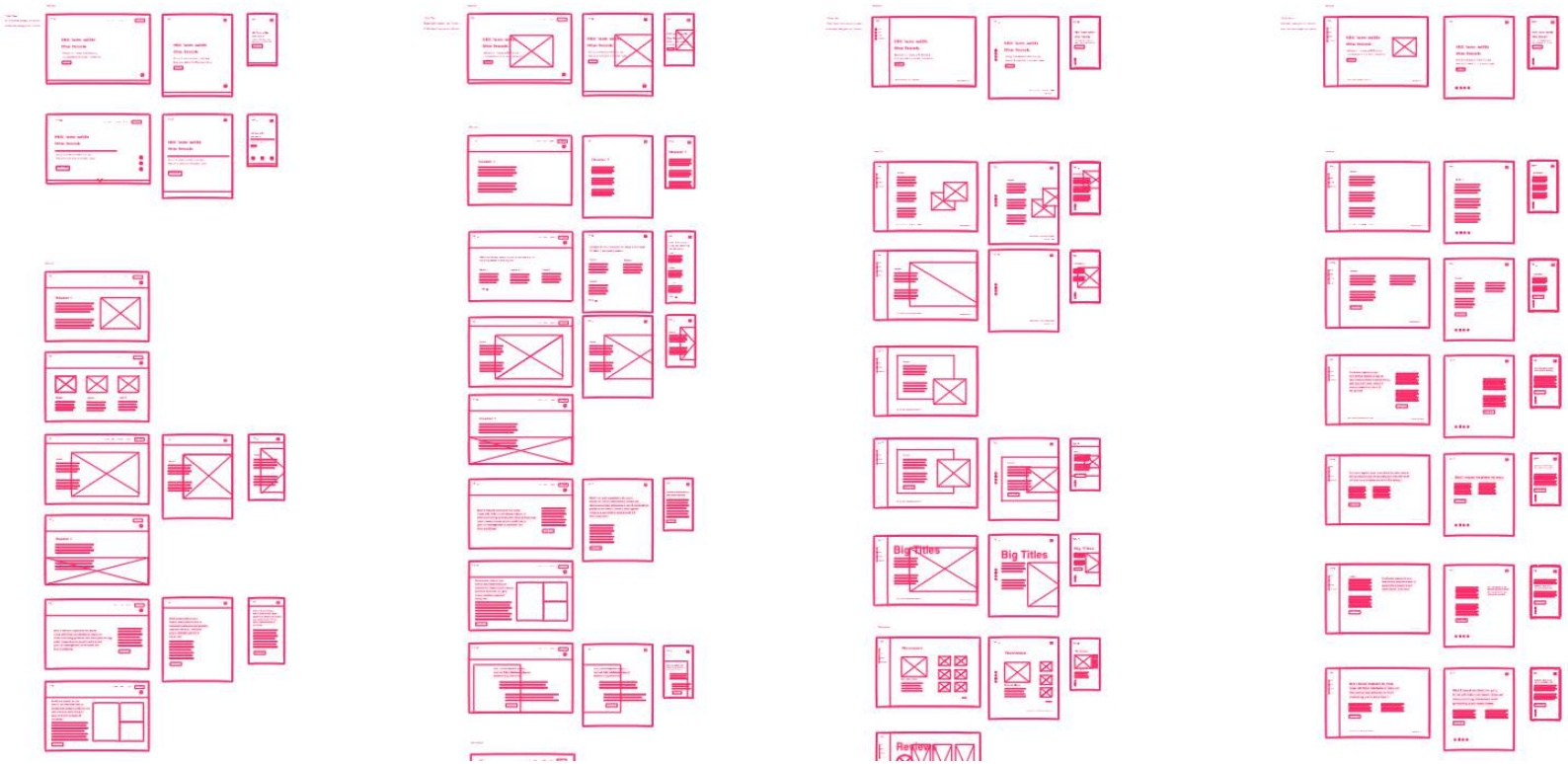
Site Structure

Before our brainstorming session, we decided to map out a simple site structure highlighting the intended user flow. This flow would allow the user to get acquainted with the company and schedule an appointment with a representative.



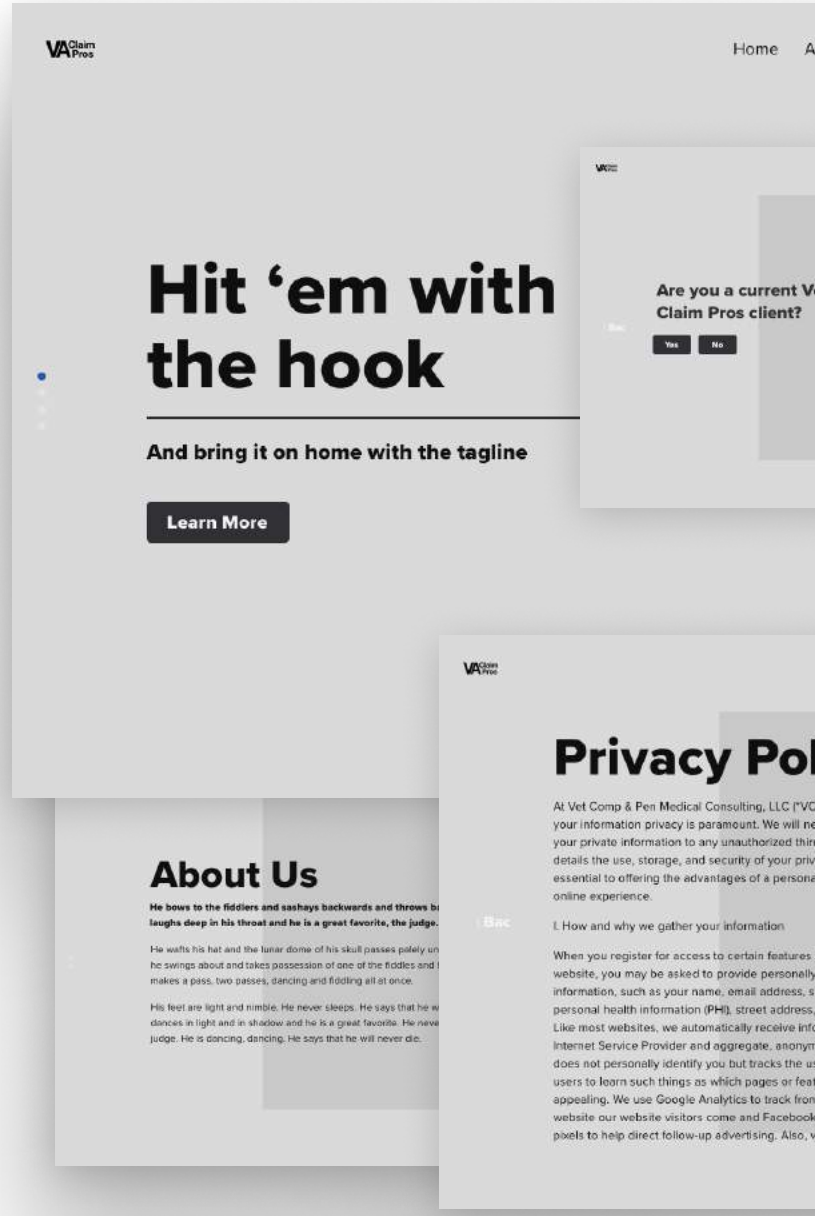
Quick Concept

After laying out the site structure, we decided to immediately begin iterating several design alternatives. We then regrouped to decide which layout would work best for the desired outcome from both a user and business perspective. Although there were many changes in our approach, this prototyping session was helpful in allowing us to explore all possible ideas in order to determine the most viable option.



Renovation

Before we started this project, we knew there were certain components that needed to be created based on stakeholder requirements. After creating them, we agreed upon which low-fidelity wireframes would work best, then we started converting them into medium resolution. In order to save time and energy we created symbols out of all individual components and linked them to a seperate style guide which we could update to effect all components in the future.



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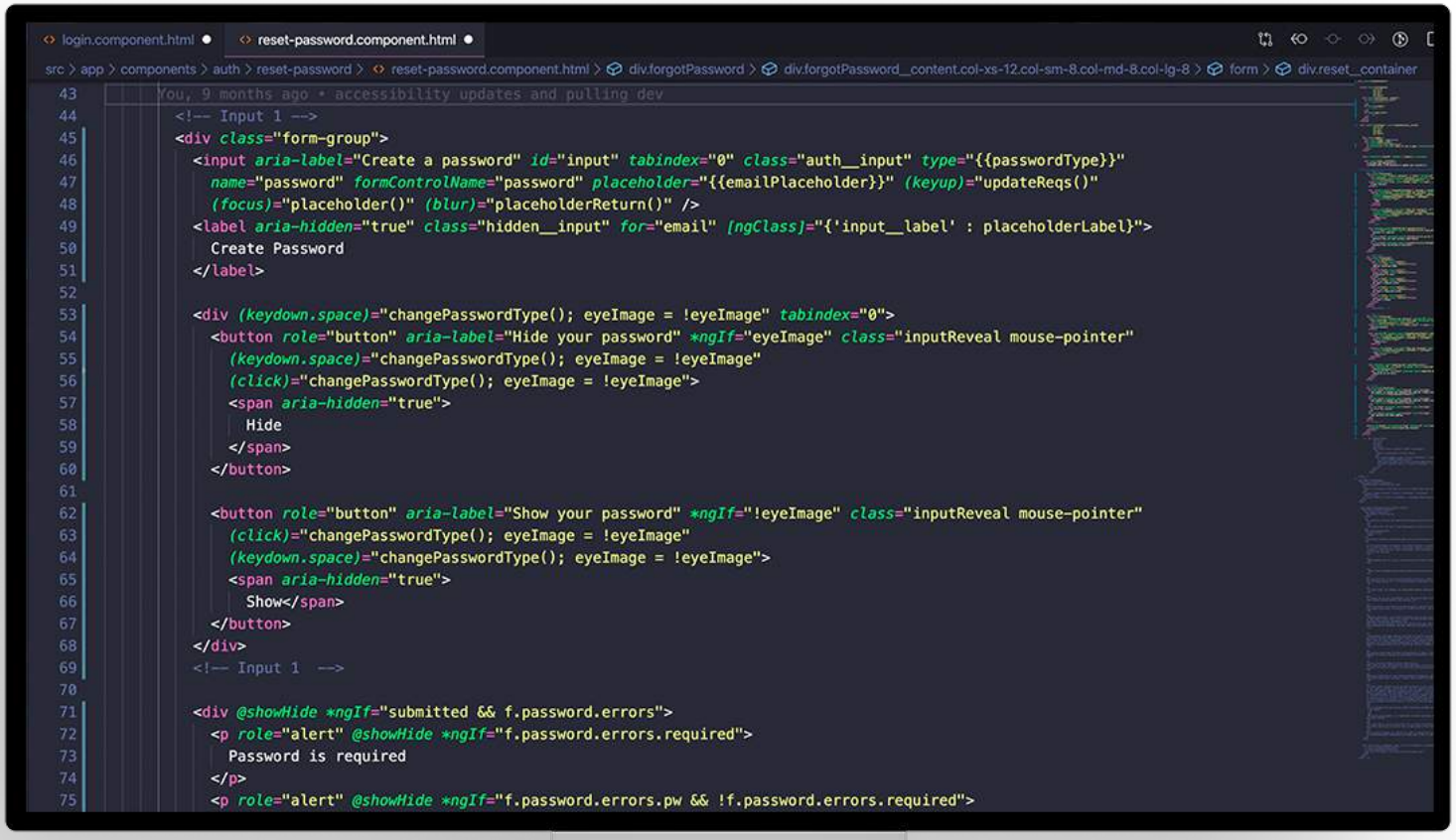
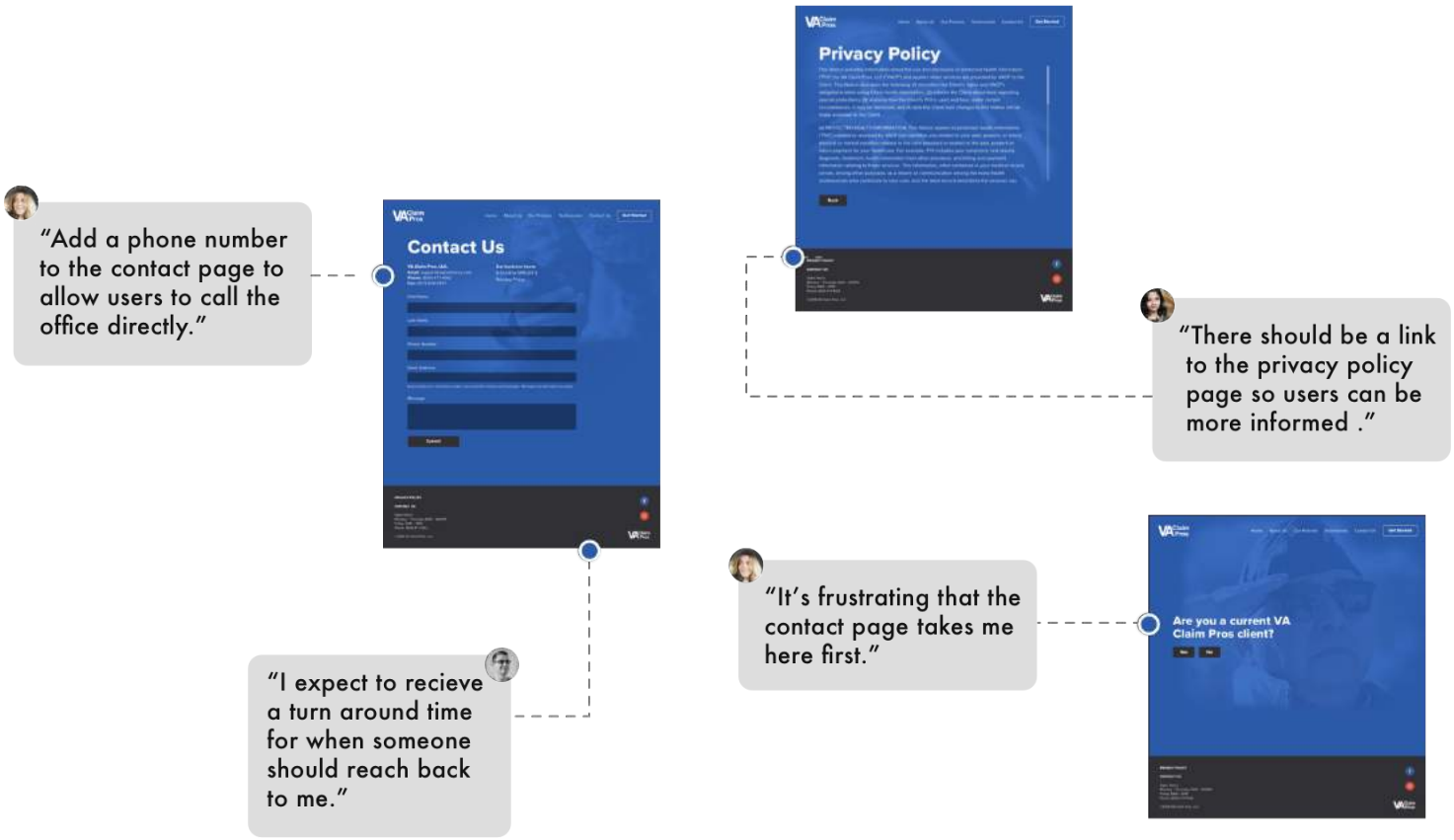


User Testing

We decided to conduct user testing sessions at various points in our process between medium and high res to validate our design decisions. In each session, we realized that there were many opportunities to improve the experience for the user. After organizing all feedback into a Trello board, we prioritized all of the changes to be made and implemented them into the final version of our high res design while adhering to stakeholder requirements.

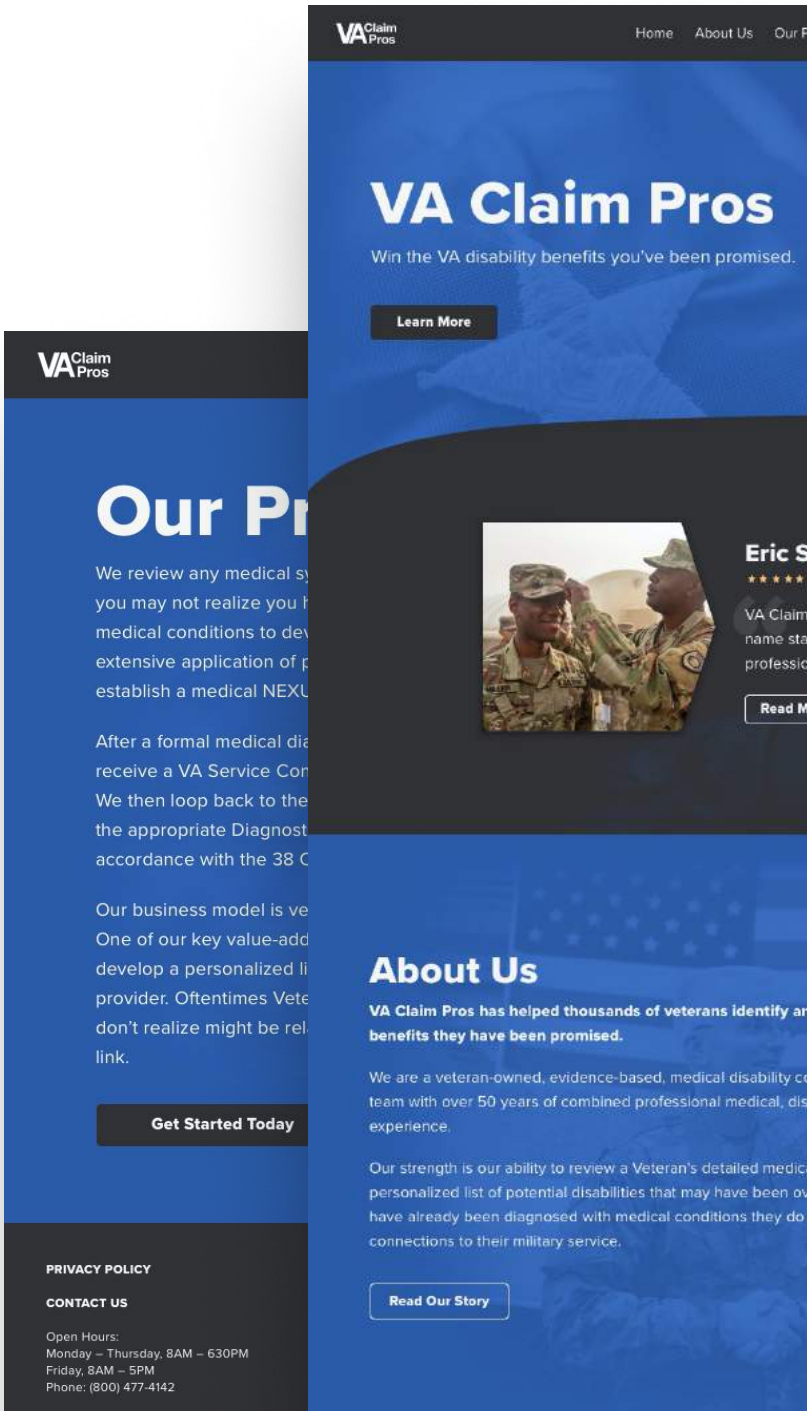


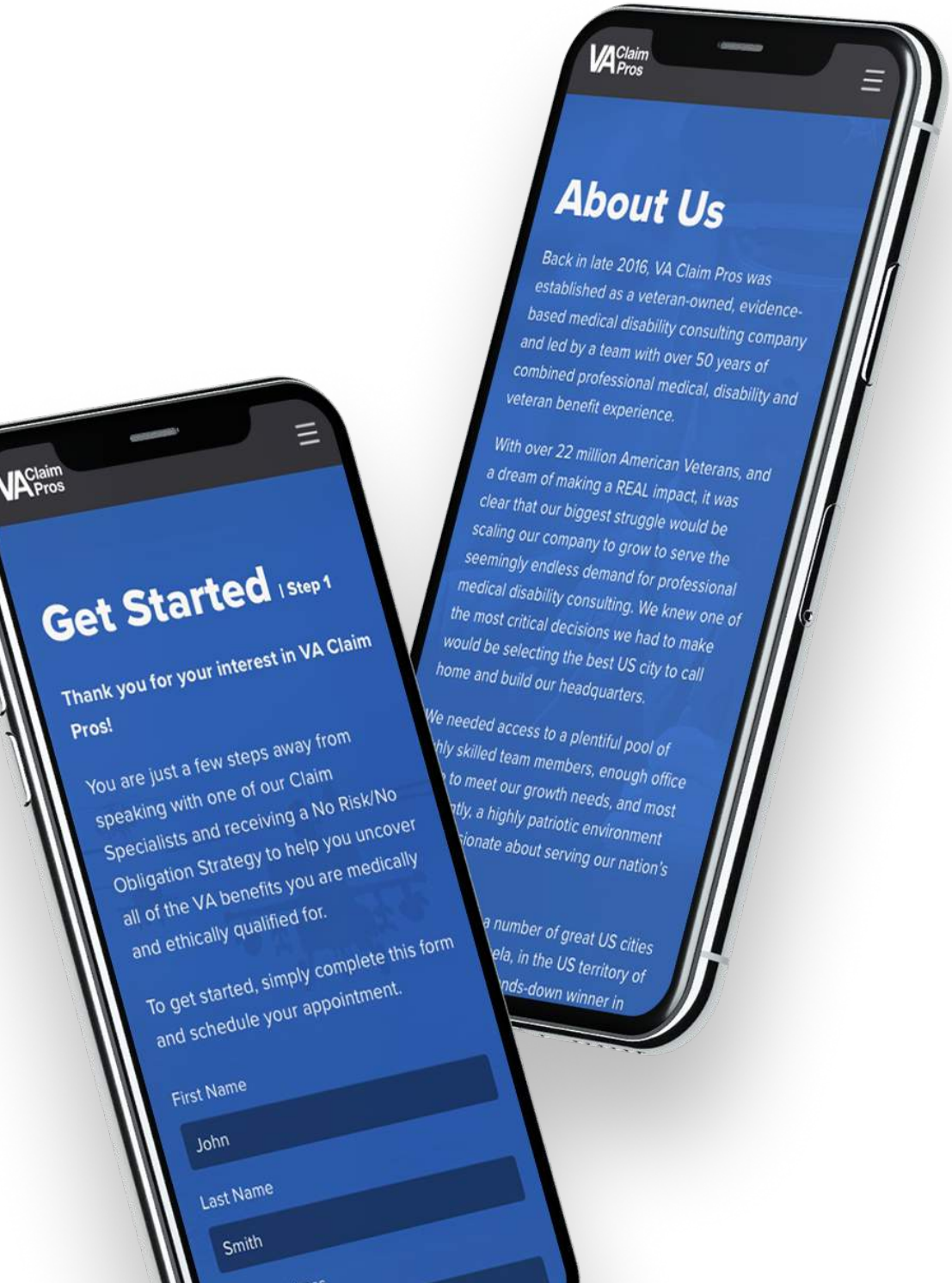
Home Page

US Military Veterans appreciate doing business with established companies they can trust and believe in. The about page was designed to build rapport and credibility with the user base.

Our Process

In hopes to increase disability benefits for US Military Veterans on a wide scale, the site is designed to take users through a flow that leads them into scheduling an appointment with one of our representatives. Current clients have the ability to reach out directly to client support.





Get Started

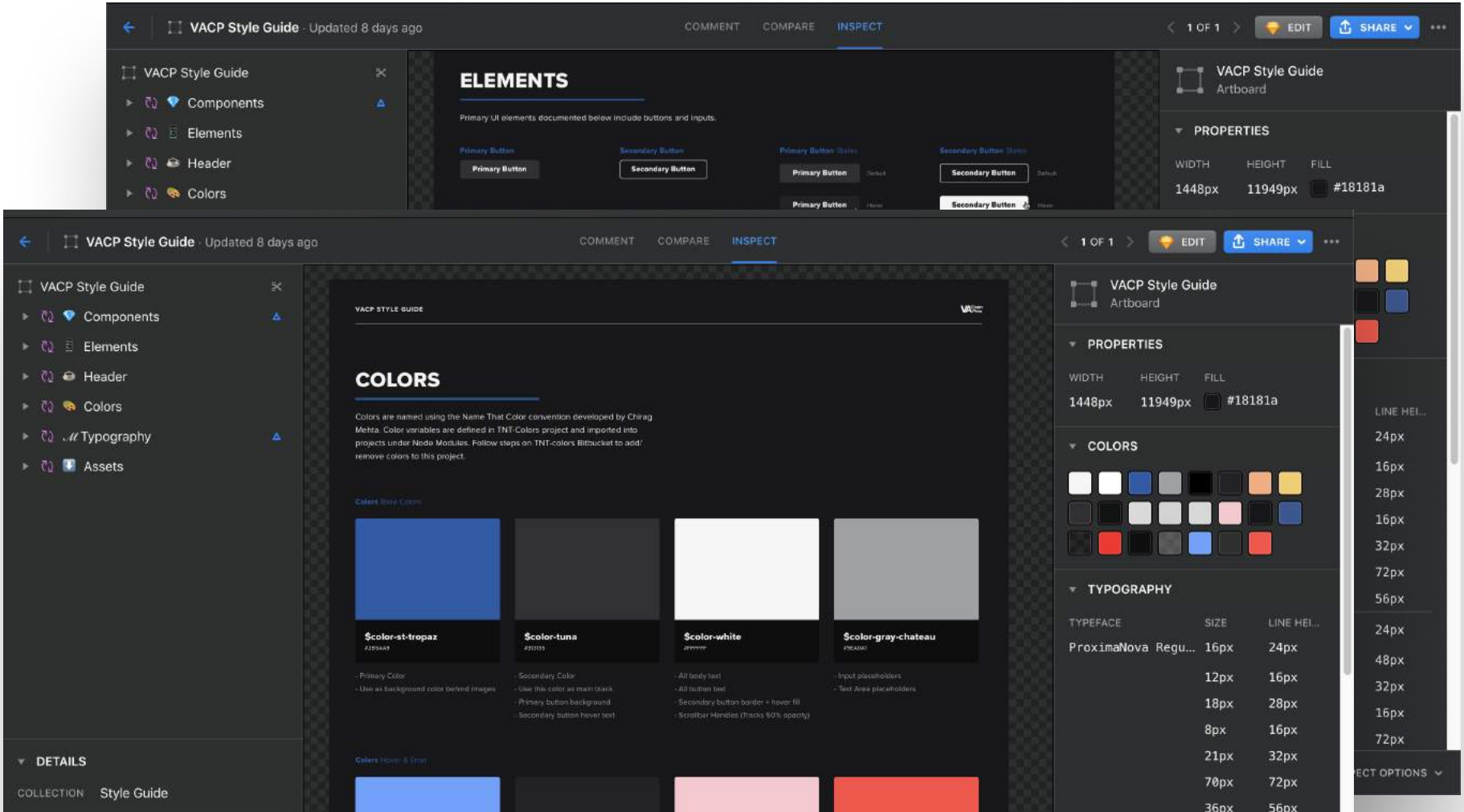
In hopes to increase disability benefits for US Military Veterans on a wide scale, the site is designed to take users through a flow that leads them into scheduling an appointment with one of our representatives. Current clients have the ability to reach out directly to client support.

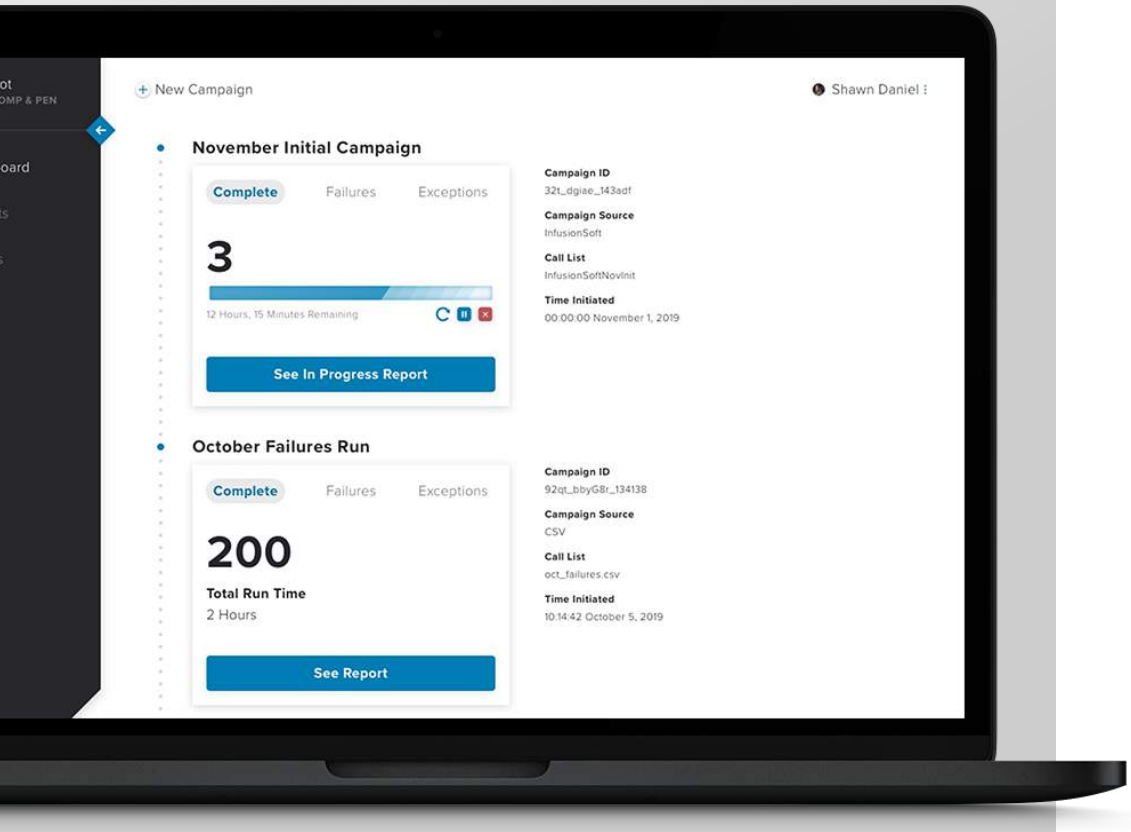
About Us

US Military Veterans appreciate doing business with established companies they can trust and believe in. The about page was designed to build rapport and credibility with the user base.

Style Guide

This style guide was created in a modular fashion based on components from our sketch libraries. Using abstract we were able to keep all UI components up to date across multiple variations of the design and reuse these components to populate each indiviual element in our style guide. This allowed us to keep the style guide up to date automatically based on edits to the library master files. Abstract also allows for peer review and critue with pull requests.





CallBot

Callbot is an application built to run or schedule processes for an internal team. The goal of developing a user interface for Callbot was to allow employees to view campaign results, manage client statuses, and view historical records in an attempt to democratize the process of running the application and bring in non-developers to use the tool.

The following case study was assembled by my teammate, Andrew Nicholl

His work can be seen at **nicholldesign.com**

Project descriptions, proprietary information, and business assets have been redacted or altered to protect company privacy.

Process

- **1. Research**
  Industry Research
  User Research
- **2. Iteration**
  Rapid Prototyping
  High fidelity
- **3. Testing**
  Accessibility
  Usability Testing
- **4. Validation**
  User Testing
  KPI's

Problem Statement

"As a user I need to be able to "

Project Duration

From inital scope to completion of Phase 1 was set for 3 sprints (6 Weeks)

Team

Hugo Ramos
Product Designer

Andrew Nicholl
Sr. Product Designer

James Rountree
Product Designer

Luke Pate
Lead Software Engineer

Tory Minars
Project Manager

Lane Holcombe
Sr. Software Engineer

Research Phase

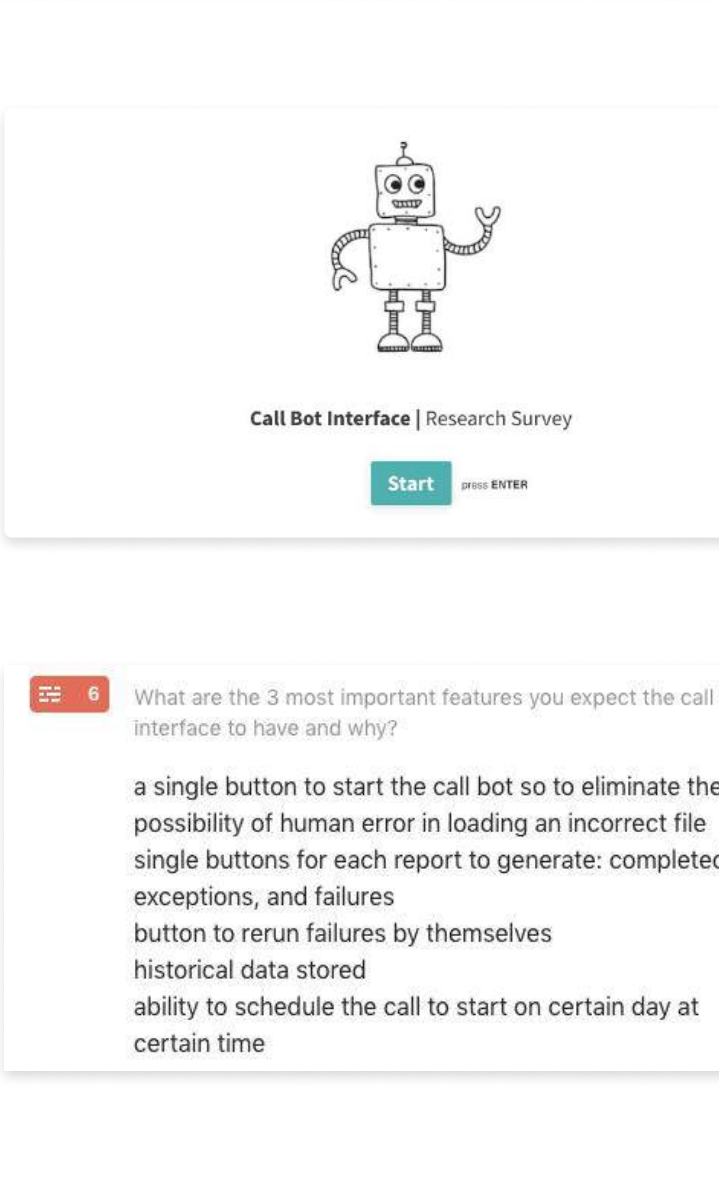
In order to figure out which types of research we needed to conduct, we first needed to understand what kind of information we were hoping to learn. We used a research brainstorming template to get all of our questions down on paper.

User Survey

We decided to conduct a survey on the handful of people within our organization that would use Callbot to understand their experience with the current system and their hopes for the future.

Key Takeaways

A single button to initiate the process within the application, ability to easily toggle views between different reports, ability to view all historical data, ability to easily rerun process if failed, ability to schedule process to happen at a future time and date.



User Personas

Using the results of our survey, we crafted two main personas who were going to be using the Callbot.

Matthew

Primary User

Personal Info

Easy going, passionate leader, meticulous.

Gender: Male

Age: Mid 40's

Marital Status: Married

Technological Aptitude: Average

User Needs

Efficiency in running business processes

Accurate historical records

Technology Devices

Android (Personal)

Windows Desktop (Work)

Windows Laptop (Home)

Pain Points

Importing and exporting excel spreadsheets takes too much time and is prone to formatting errors

Not familiar with the command line and cannot run the application in it's current state without assistance from dev ops

Readying data in plain text format and looking through large json objects is tedious and details are often missed

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Busy Bethany

Secondary User

Personal Info

Focused, gets the task done, juggles a million things at once.

Gender: Female

Age: Late 20's

Marital Status: Single

Technological Aptitude: Low to Average

User Needs

Clearly see different results between different clients

Have similar results be organized together

Ability to export lists of results

Technology Devices

iPhone (Personal)

Windows Desktop (Work)

Windows Laptop (Home)

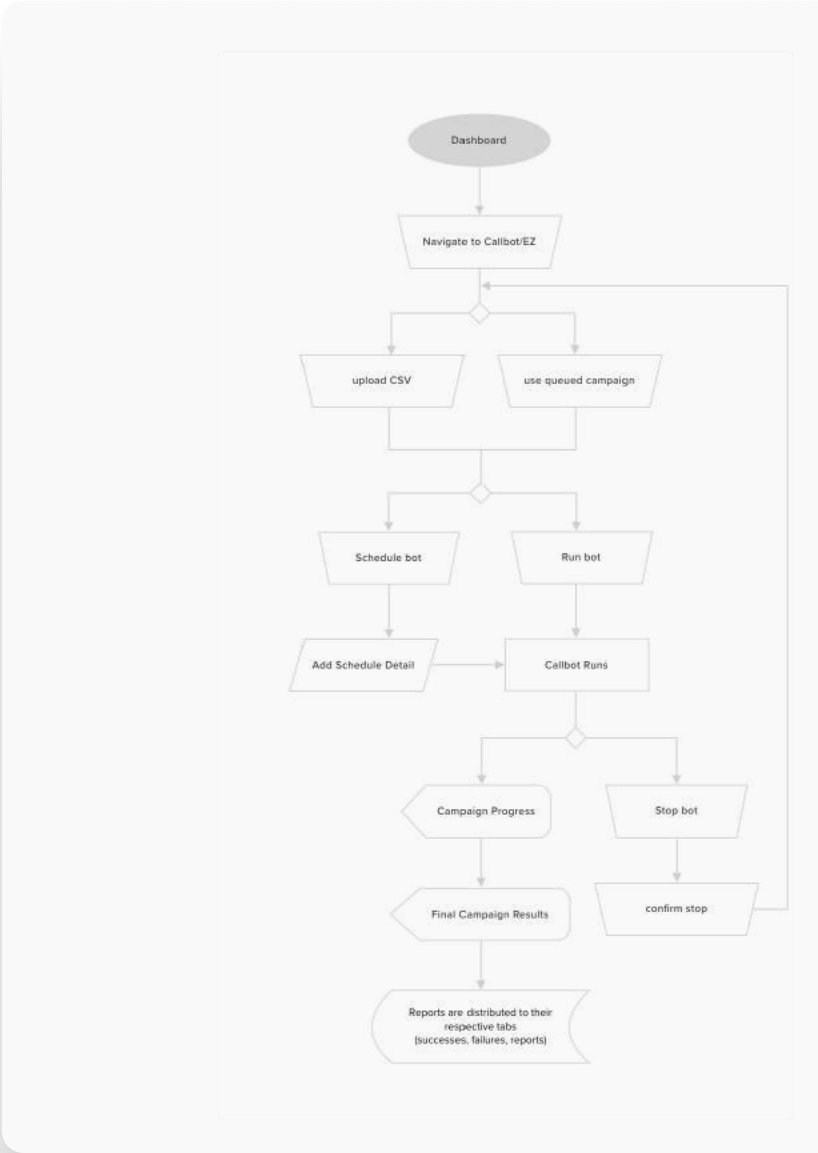
Pain Points

Having to update spreadsheet names with different versions is hard to keep track of

There's no way to see how far into the process I am until I'm nearly done

Site Architecture and Task Flows

Based on the needs of our users we determined the basic site architecture of Callbot and began making task flow for each section of Callbot's interface. After we had the core structure and flow of our application in place, we moved on to the next stage in the design lifecycle.



Agile Design Sprints

In order to put out a testable component at the end of each design sprint, we broke the project up into it's major components and focused one of the major components per sprint.

Design Lifecycle

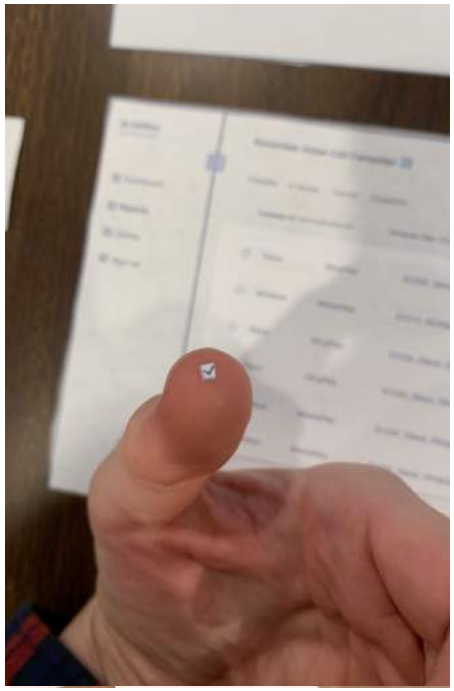
This meant going through an entire design sprint cycle of wireframing, usability testing, creating hi fidelity design mockups, and developing rapid prototypes in Angular to use for a final usability test before continuing to the next component.

Wireframes

At the beginning of each sprint, we decided which major component we were tackling and dove into sketching and creating low-fidelity wireframes in InVision Freehand. We then replicated our task flows using our wireframes to ensure that we were not missing any necessary steps or features.

Paper Testing

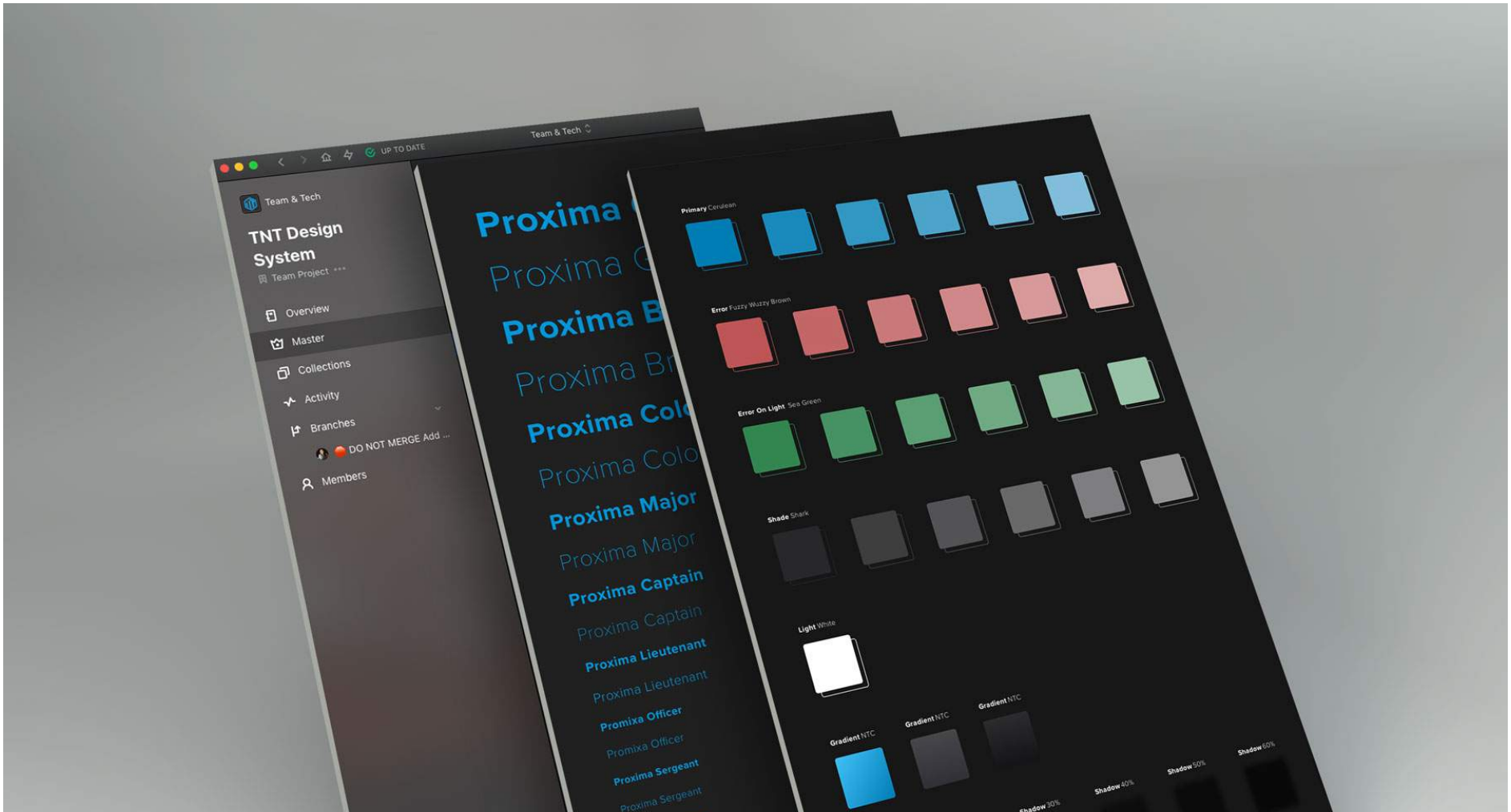
We then printed out these wireframes, cut them up, and conducted usabilities tests using these paper prototypes. Our notes from these paper testing sessions were used to rapidly update wireframes and conduct more tests. After three to four rounds of tests for each component, we were ready to move into designing mockups in Sketch.



- [x] **Run the call bot task** - "If you wanted to start a new one, would got to campaigns or run bot?" - assumed the side navigation would just run the bot, expected a task instead of navigation ("home" instead of run bot)
- Made it "Dashboard"
- [x] **Start a new campaign task** - "from here I would click run bot to clear this out" (click on new campaign)
- Fixed by above task
- [x] **Run new campaign task** - "Expected the navigation was steps, instead of actual navigation" (Copy)
- Changed their names, bolded active tab
- [x] **Campaign type what would you expect to happen** - "Infusionsoft campaign means I have to upload the CSV" - "Can we automate the pulling of the CSV at a certain time of the day?" " We need to pull that campaign the night before around midnight, and I would expect to schedule it and it would automatically pull the latest CSV"
- Changed "Campaign Type" to "Campaign Source"
- [x] **Changing to upload csv TASK** - "you would check the dropdown and highlight CSV, "Choose to me is vague, it seems like I already loaded the CSV", It should be "Browse" that makes sense to me, like I have to browse to find the right one"
- Changed to "Browse"
- [x] **Change other form queue TASK** - "Just click the drop down", "I want to have to pick the one I want so that way someone has to make sure they choose the right option"

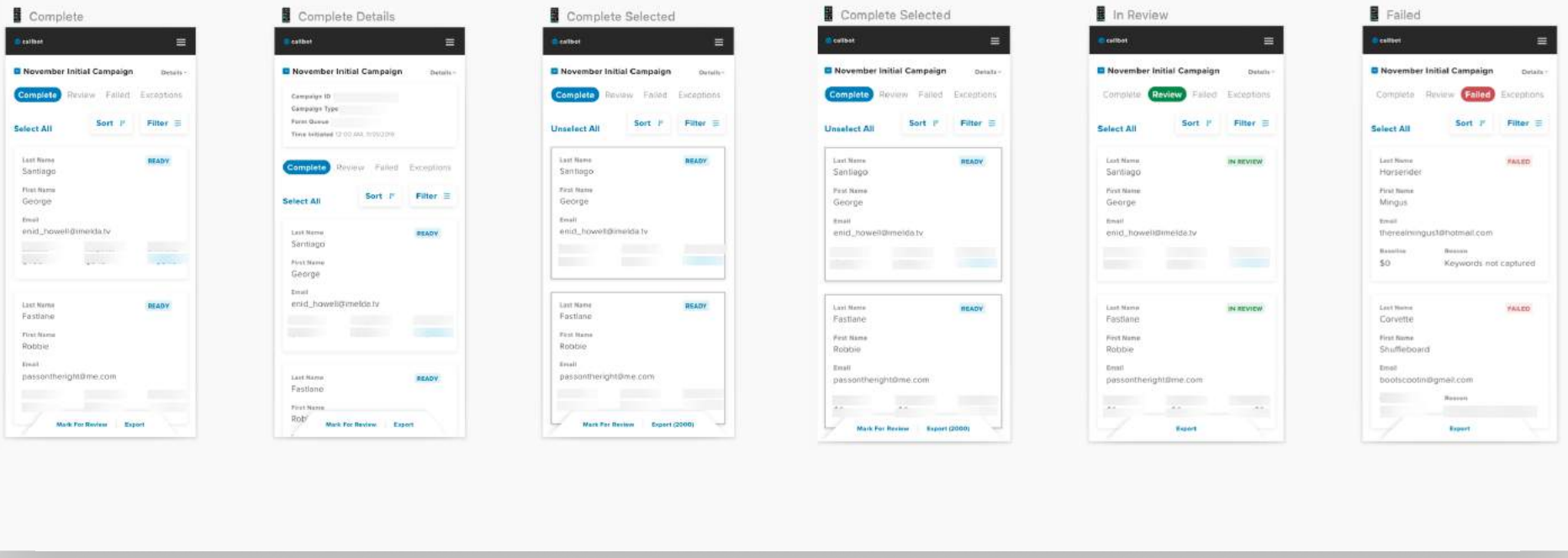
Design System Implementation

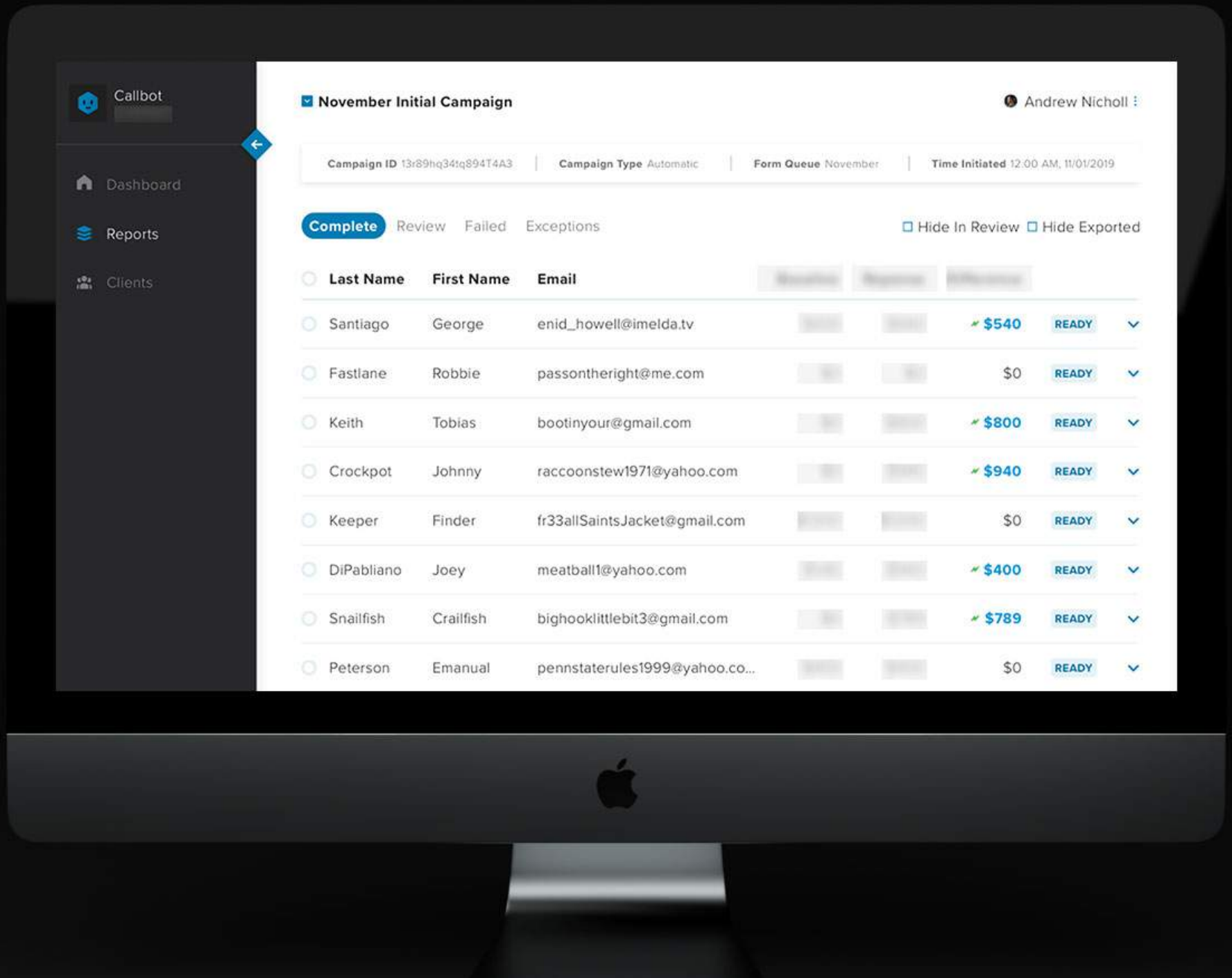
Using our design system for internal products we were able to come into this project with a predetermined set of minor components and styles. These included colors, icons and typography, which was extremely helpful in speeding up the design process, staying organized, and maintaining consistency throughout the application.

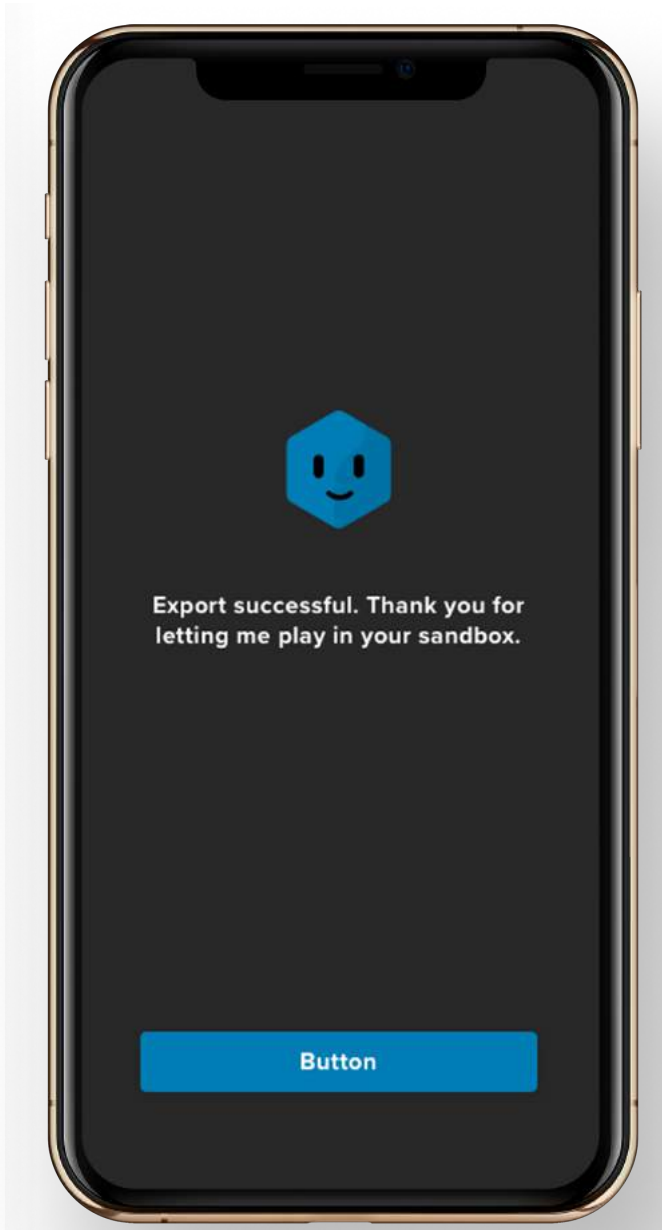


Design Mockups

After ensuring the low-fidelity wireframes for each major component met all user and product requirements and scenarios, we converted our initial concept drawings into medium resolution mockups. We then styled them and added all reusable components using the design system.




Callbot
Dashboard
Reports
Clients
November Initial Campaign
Andrew Nicholl
Campaign ID 13r89hq34tq894T4A3
Campaign Type Automatic
Form Queue November
Time Initiated 12:00 AM, 11/01/2019
Complete
Review
Failed
Exceptions
Hide In Review
Hide Exported
Last Name
First Name
Email
Santiago George enid_howell@imelda.tv $540 READY
Fastlane Robbie passontheright@me.com $0 READY
Keith Tobias bootinyour@gmail.com $800 READY
Crockpot Johnny raccoonstew1971@yahoo.com $940 READY
Keeper Finder fr33allSaintsJacket@gmail.com $0 READY
DiPabliano Joey meatball1@yahoo.com $400 READY
Snailfish Crailfish bighooklittlebit3@gmail.com $789 READY
Peterson Emanual pennstaterules1999@yahoo.co... $0 READY



Maintainable

By sticking to our design system and keeping up our documentation as one would in a traditional design to developer handoff, we were also able to ensure that it would be easy to add additional components and functionality in the future, while sticking to the design and style guides we have in place.

User Focused

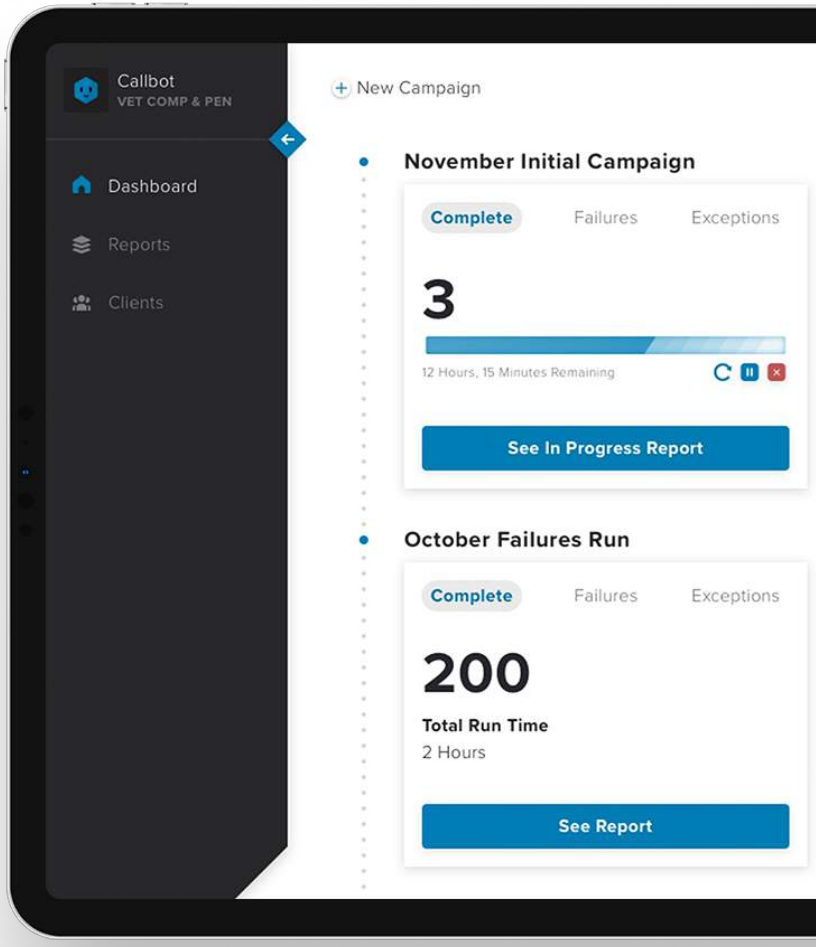
Not only did it keep work interesting, it made for an overall better product, as we were able to conduct usability test between sprints and quickly implement changes to the previous sprint's component and embrace new ideas for the next one.

Accessibility

Having the product development team spearhead front-end development also helped ensure accessibility in our product from the outset, by writing semantic html and ensuring WCAG and ADA compliance.

Agile

By embracing agile methodologies and building out each major component per design sprint, we were able to produce results fast and keep the development process moving in tandem with our design process.

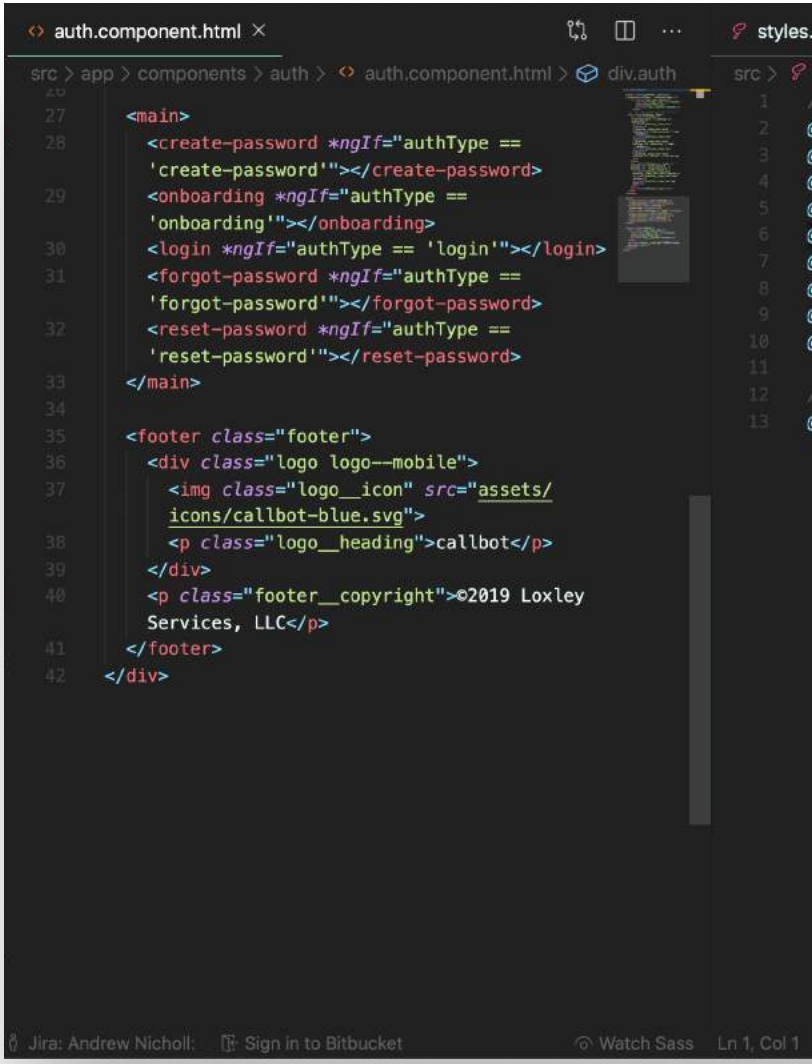


Development

Our team utilized Angular as our development framework, so we began development by laying the frontend foundation for our Angular project using HTML, Sass (SCSS), and Typescript.

Usability Tests & Demo

At the end of each sprint, we conducted a final usability test of the component and made any necessary updates before holding out demo for product owners, stakeholders, and the development teams.

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Complete
Select All
Review
Failed
Exceptions
Sort
Filter
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First Name
John
Email
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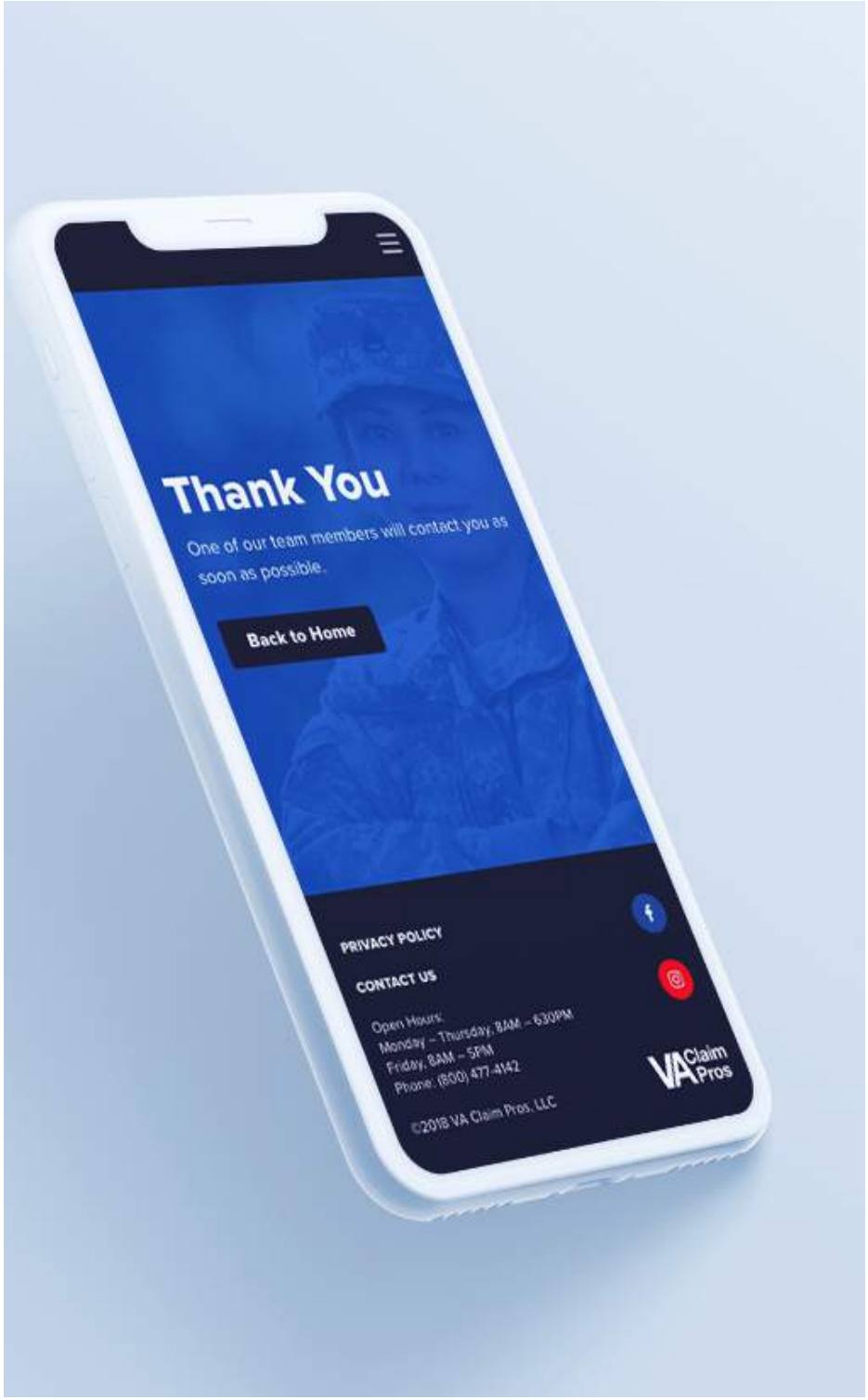

Lets Connect!

Thank you for taking the time to view some of the highlights of my work.

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