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1. Discovery & Ideation

Discovery & Ideation Phase, Capital One Home Loans

Capital One Home Loans asked us to help them find out why their employees weren't using the Tableau Business Intelligence tool that they had recently implemented and help them find a better way to gain adoption through insights and new designs.

My role on this project was as a Sr. Experience Researcher. The following slides will show you deliverables and insights gained from this engagement.

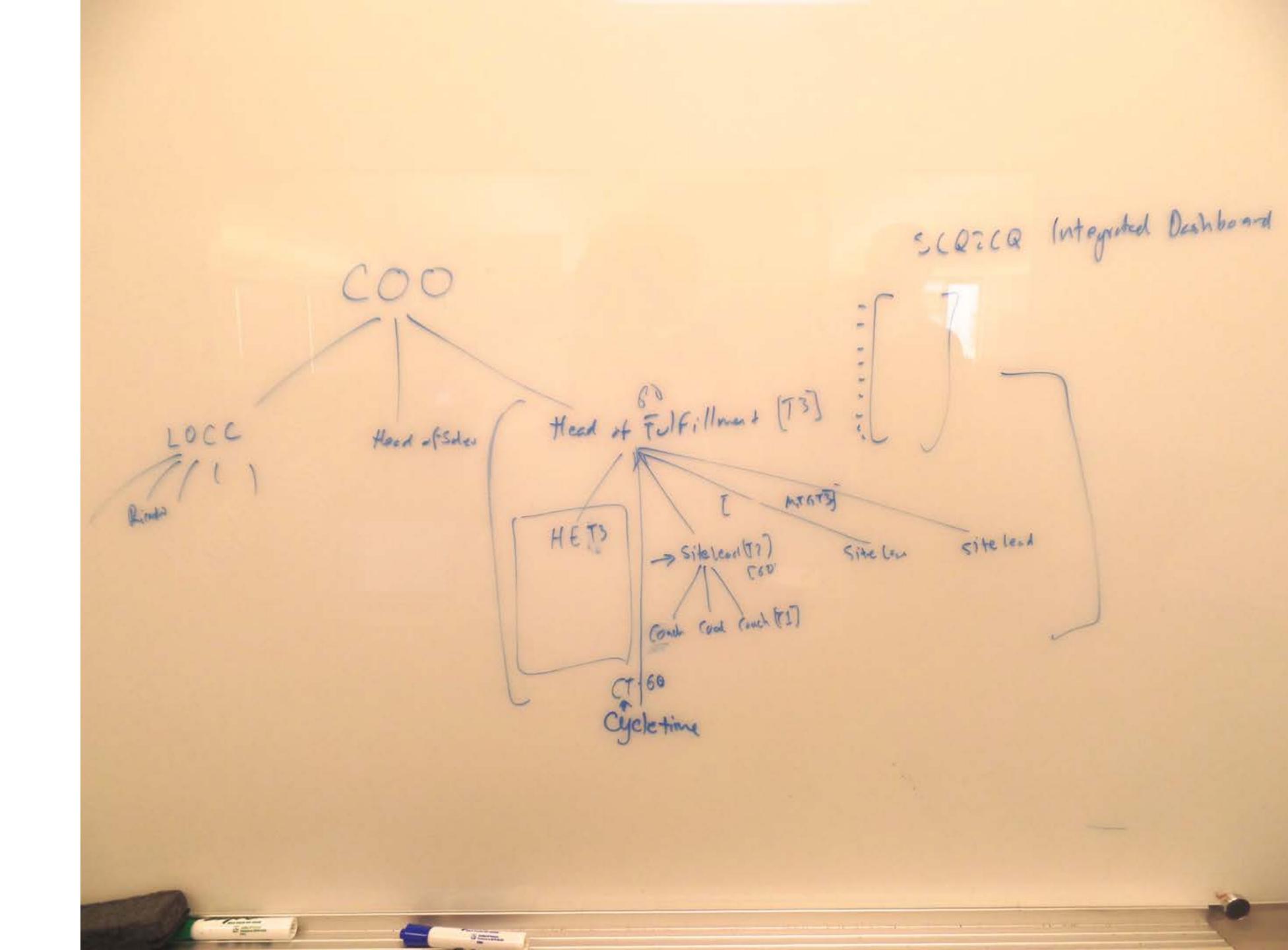
Capital One is in the process of implementing these suggestions as well as replicating them across their organization.

Discovery activities

- Stakeholder interviews
- Organizational mapping
- KPI mapping and flow within organization
- Contextual inquiry with paper prototyping activity
- Research synthesis
- Opportunity identification
- Opportunity ranking

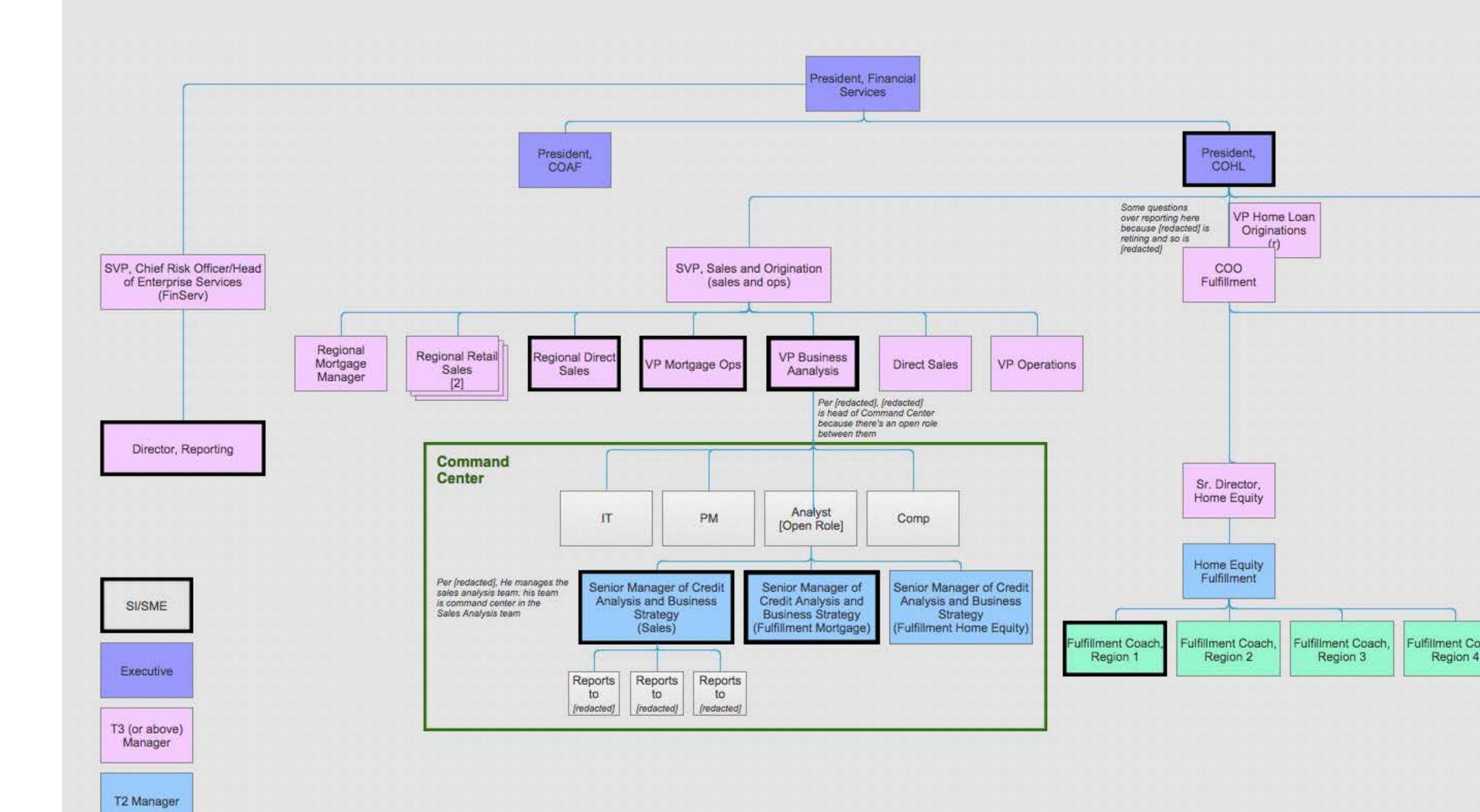
Stakeholder interviews

- 8 in-person interviews over three days
- Positions range from midmanagement to the President of the organization
- Purpose was to gain an understanding of the organization as a whole and how reporting information flows throughout it
- Standard questions asked of all participants
- All participants asked to draw their place in the organization



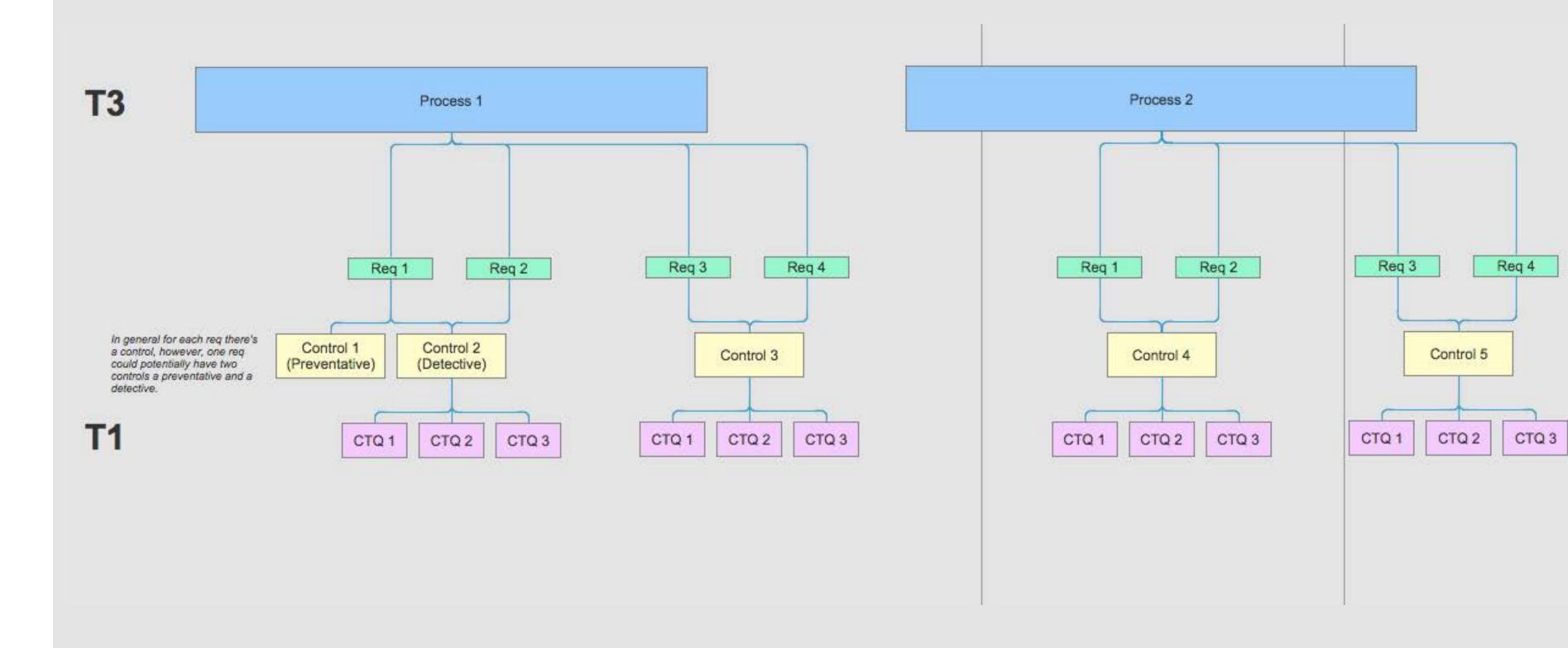
Organizational mapping

- Using information from stakeholder interviews, as part of scope of work for this engagement we were asked to map the organization for the client
- I created this map to show the map of the organization, pointing out who was included in our stakeholder interviews and contextual inquiries.



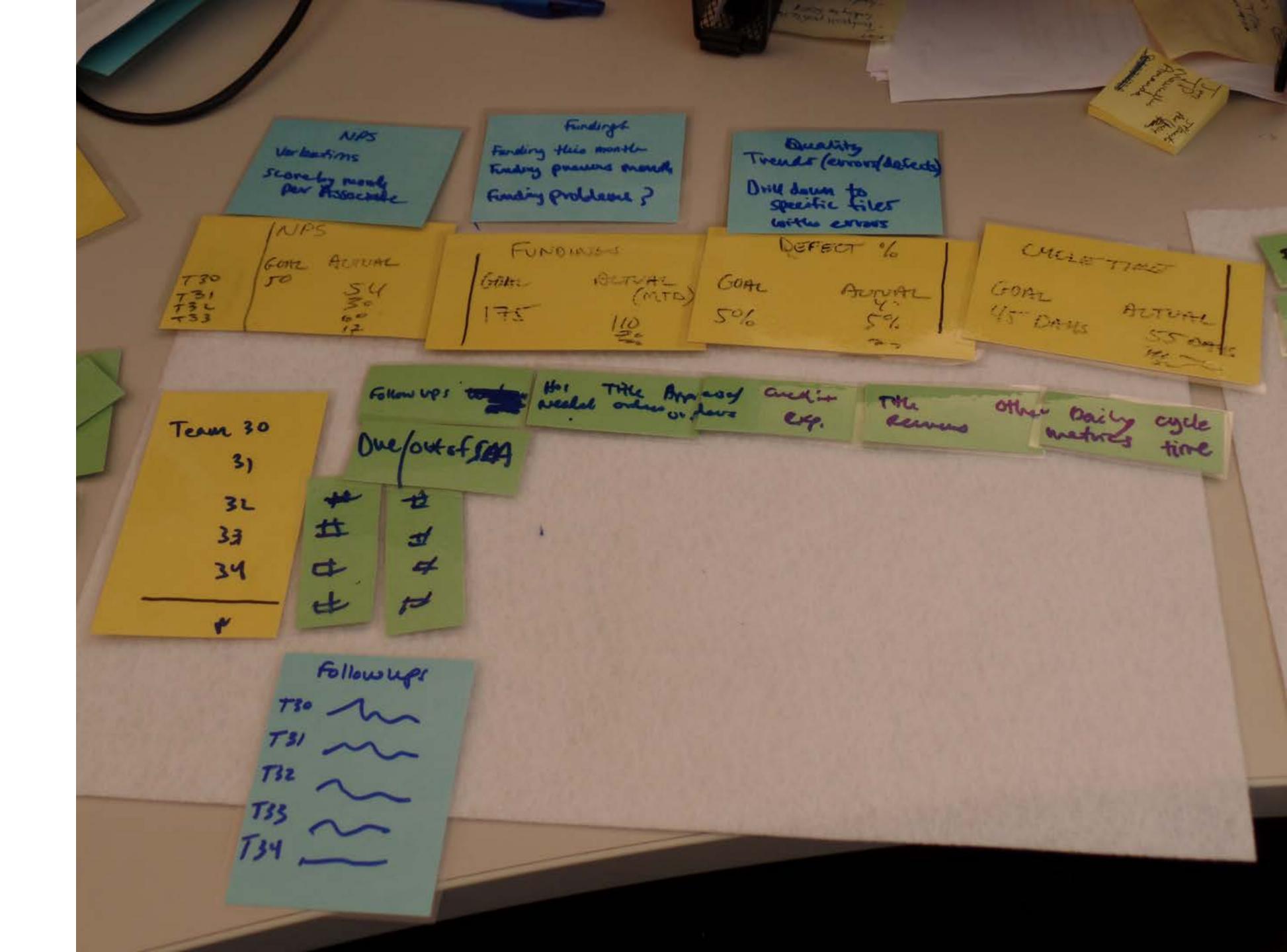
KPI mapping and flow within organization

 Mapping of various KPIs at varying levels of the organization to illustrate how they fed to into large processes.



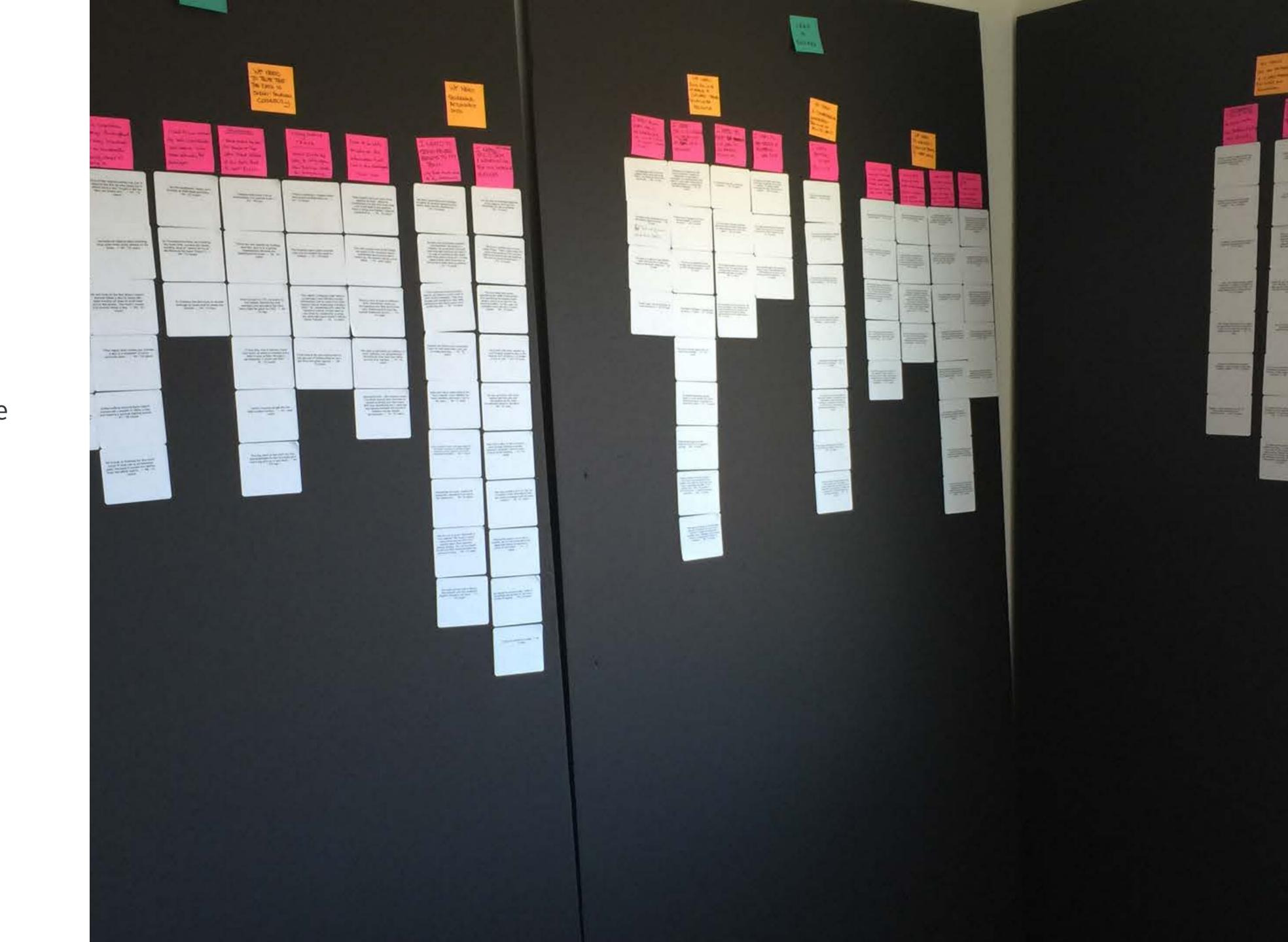
Contextual inquiry with paper prototyping activity

 At the end of the contextual inquiry activity, users were asked to create their own dashboard. These findings were used with other research to guide opportunities and their ranking.



Research synthesis

 Once stakeholder interviews, mapping, contextual inquiries, and user prototyping were complete, an affinity diagram activity commenced to synthesize the information from discovery.

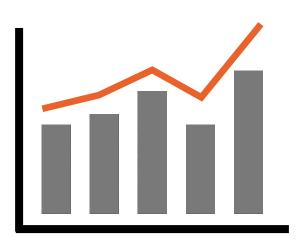


Opportunity identity

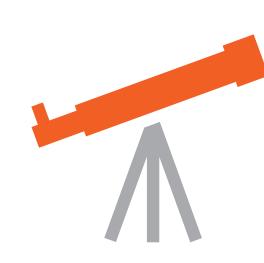
- From the affinity diagram,
 I was able to identify
 multiple opportunities for
 the organization to reach
 their goal of 100%
 adoption of the dashboard
 product.
- I used affinity diagraming again to group opportunities into three principal areas.



Build a solid foundation



Lead to succeed



Turn intelligence into action

Opportunity ranking

- Identified opportunities were ranked based on their impact to UX
- Capital One will now use these opportunities to create an improved product and processes in their home loan division.
- As a result of this research engagement, Capital One will be able to increase adoption of a tool they've invested a large sum of money in to help users meet their goals and contribute to the overall health of the business.

Opportunity	Very High Impact on UX	High Impact on UX	Medium Impact on UX
Access			
Role-based logins			
Data integrity			
Source of truth			
Show actual data			
Data architecture			
Presentation			
Share data			
Presentation of historical data			
Robust search (advanced option)			
Display organizational tools			
Custom report creator			
Analyst-created canned reports			
Training and Marketing			
In-person training workshops			
On-demand training modules			
Team forums			
Leadership buy in			

2. Interaction Design

Interaction design, Stanford Research Institute

Stanford Research Institute asked us to create a mobile product for them based on years of research regarding behavior modification for quitting smoking.

My role on this project was Lead UX Designer, all work except visual design was done by me. The following slides will show you deliverables from this engagement.

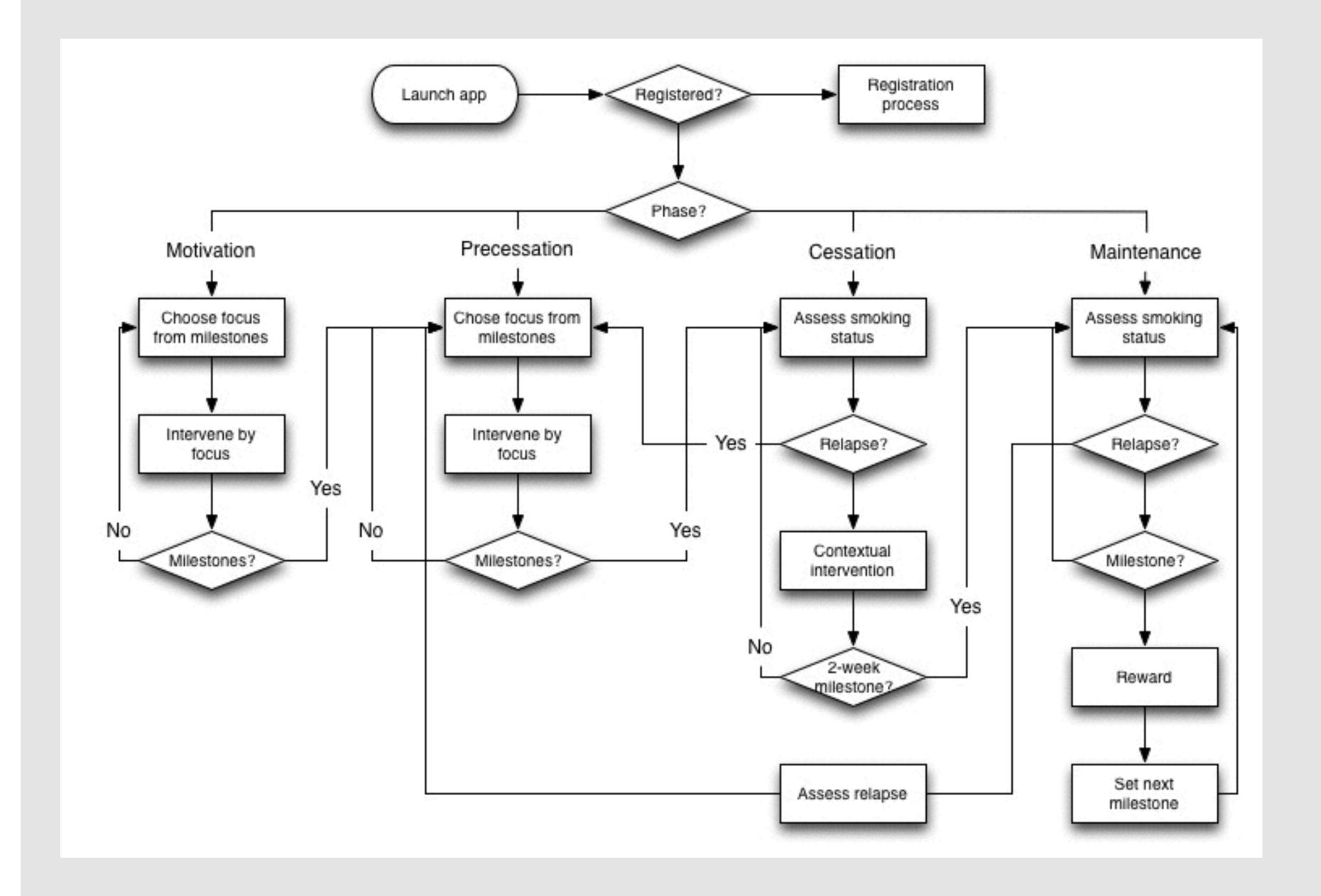
This product is currently waiting for funding for clinical trials.

Interaction design deliverables

- Workflow diagraming
- Wireframes
- Final high-fidelity mock ups

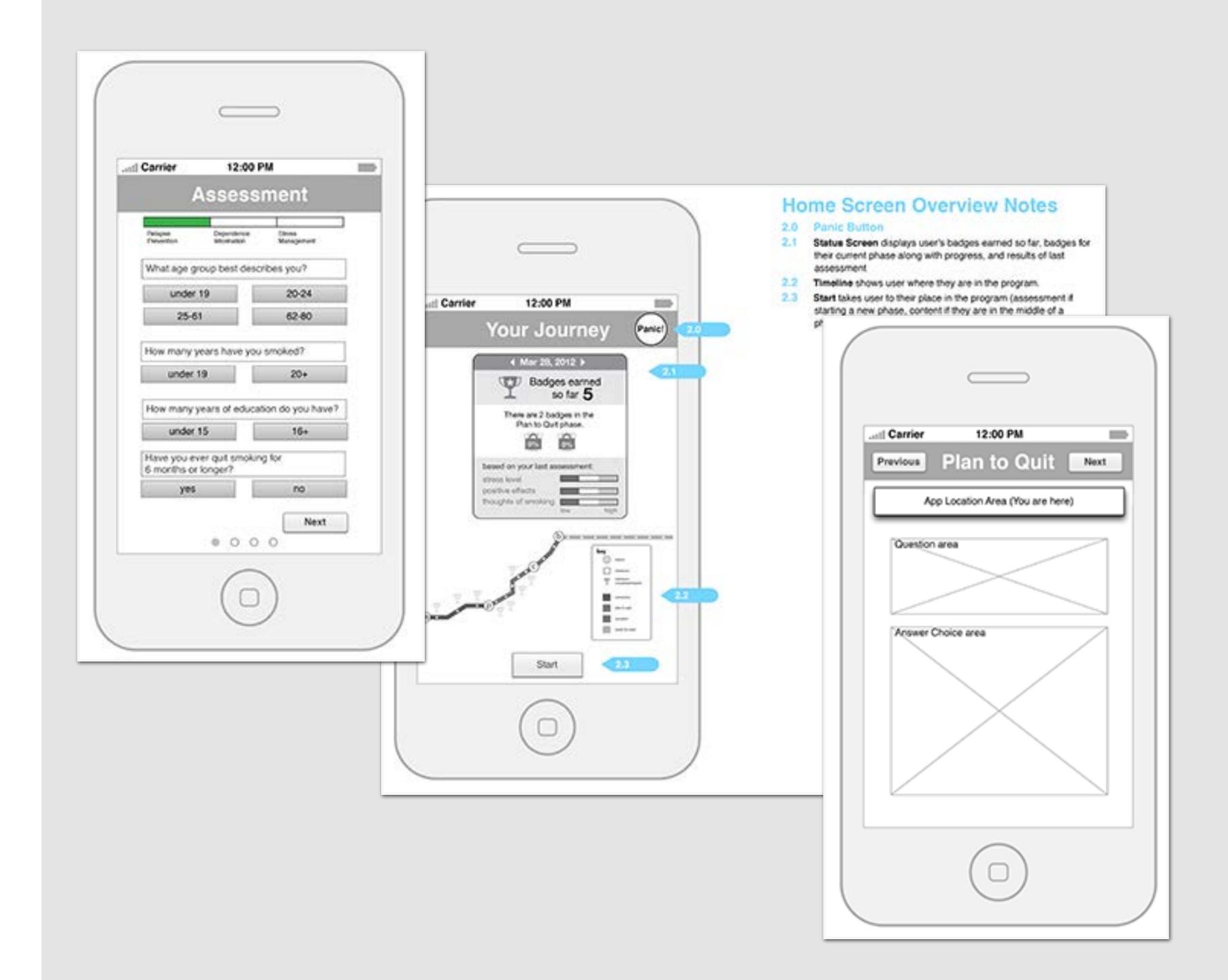
Workflow

- SRI had years of research that determined there were stages to quitting smoking.
- My job was to create an app that would divide the quitting experience into these 4 distinct stages.



Wireframes

- There were a few iterations on concepts before I got to the final product.
- The initial concept was a sort of "subway map" journey through a 4 week program as seen in these wires.

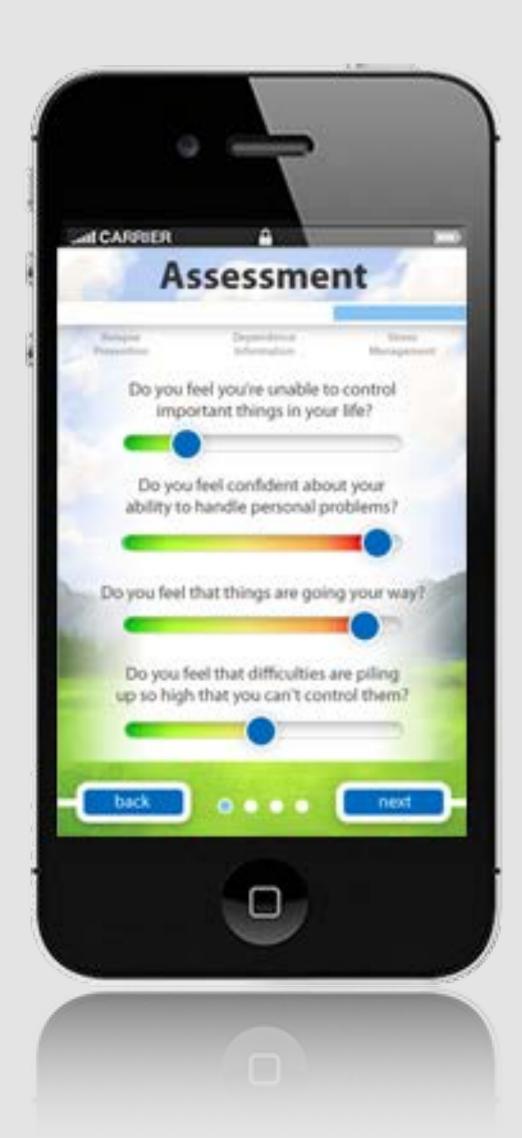


Final hi-fi designs

- The final concept became a journey through the country with stops along the way at lakes and mountains.
- The idea was to let the user identify with the idea of "fresh", "clean", and "natural" in their quest to stop smoking.







Interaction design, McKesson Diagnostics Exchange (DEX)

The McKesson Diagnostics Exchange is a registry of genetic tests that help diagnose people predisposed to illnesses like breast cancer, or to evaluate how well a patient's gene profile will respond to chemotherapy protocols.

I served as the UX Director, providing all client communication and also acting as product manager for our organization with this client. All aspects of interaction design, visual design, and production were under my direction.

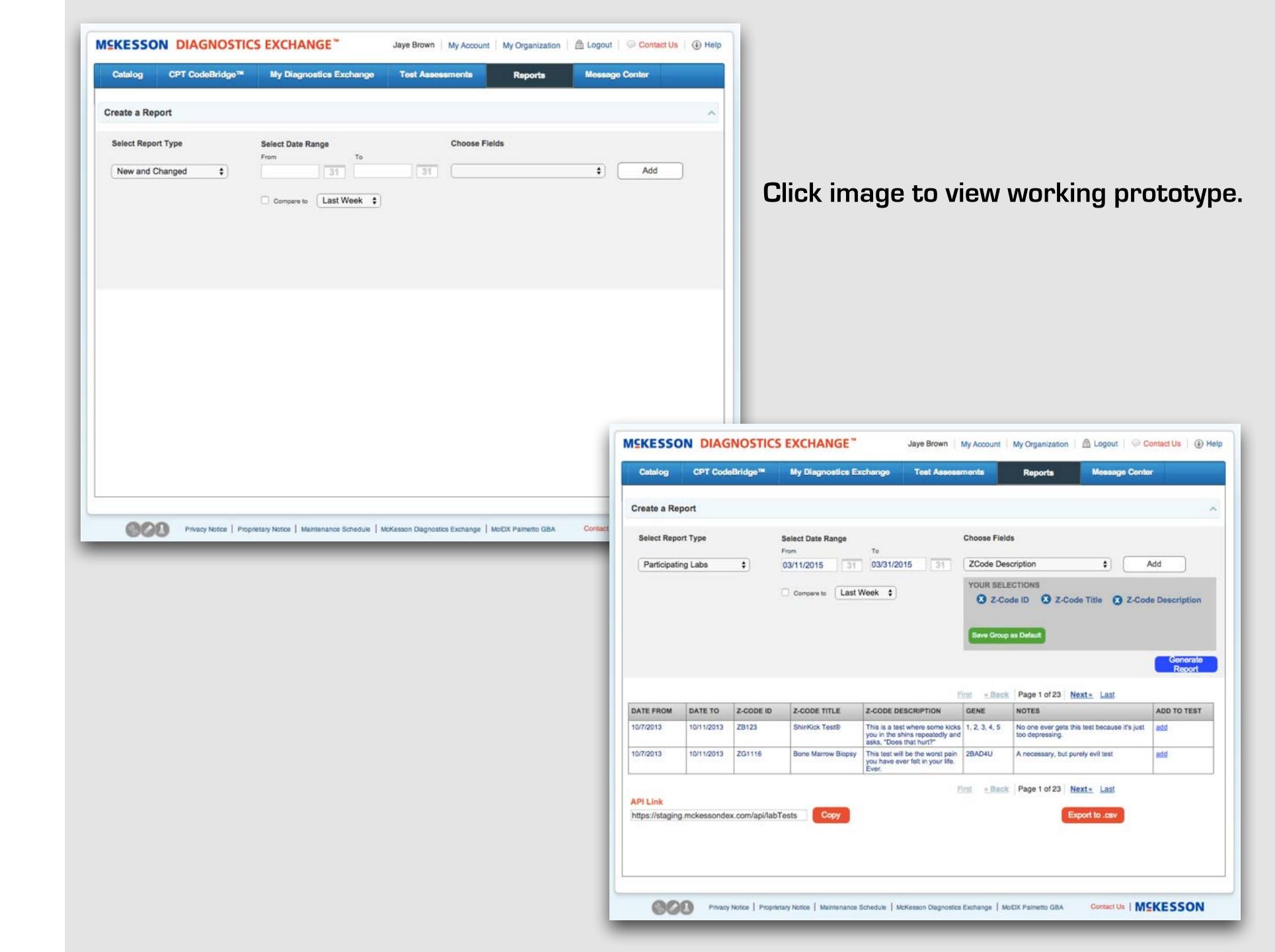
Because DEX was a long term, well-established product for which I had implemented the use of a pattern library, many times the designers could skip wires and go straight to prototyping or high-res comps.

Interaction design deliverables

- Final high-fidelity mock ups
- Clickable prototype

Final hi-fi designs from prototype

- Payers (insurance companies) needed a way to build reports that showed them the tests that labs had registered.
- They needed to be able to select just the information they wanted to see for delivery.
- I set up Axure to include pattern libraries for this product.
- This made it possible for me to go straight to hi-res prototype from beginning to end with this client as they had a hard time "visualizing" concepts in wires.



3. Implementation

Design and Implementation, Stent Tracker

Stent Tracker was built in conjunction with Boston Scientific to track ureteral stents that have been implanted in patients for tracking removal. (Learn more about Stent Tracker <u>here</u>.)

I served as the UX Director during this engagement, overseeing all aspects of interaction design, visual design, and production.

This mobile app for both iPhone and iPad allows clinical staff to scan the packaging for a ureteral stent in an operating room environment and connect the identifying information to the patient's medical record.

The product is currently in pilot program with a small group of physicians and receiving excellent feedback.

Interaction design deliverables

Final product shots

Implemented designs

- I worked directly with the development team both locally and in Belarus in an Agile environment to implement these designs
- We had an extremely tight deadline to meet in order to be ready for the pilot study.
- This project was designed and built in 5 weeks.
- Mobile devices both allow for scanning and adding a patient.
- Desktop is a larger application that works with this product as well as some other products designed by the company.



4. About Jaye

About me

- 17 years as a UX researcher and designer
- Mobile, enterprise, transactional products
- Healthcare, retail, financial, and higher education industries
- Ability to understand dense subject matter in a quick manner to be an effective strategic partner to clients in building their products
- I always thought I was going to be a lawyer. I became a UX designer instead.
- I was a Miller Lite beer can for Halloween in the third grade.



UX Community involvement

- 2016 Top 50 Female UX
 Designers in Austin, TX
- Writing—
 Everyone Together Now:
 Prototyping for Team
 Alignment
- Recent Events—
 Idean Executive
 Roundtable
- Classes Taught—
 Prototyping 101 at General Assembly

Want more?

Case studies available at:

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