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ABOUT ME

I believe that experience is everything and that everything is an experience. My goal is to encourage experiences to deepen relationships.

I've more than 15 years of working with Fortune 500s (Marsh & McLennan, MetLife, AT&T) and smaller companies. I've worked on web-based applications, process improvement, transitions and other experiences of various sizes for both internal and external customers. I bring a unique ability to:

- Collaborate with stakeholders
- Communicate clearly
- Understand how to exploit constraints to our advantage

From my experiences, I've learned that it's important to always look at things from different angles (both literally and figuratively). Fortunately, I have an insatiable curiosity, which is reflected in my musical, literary and intellectual pursuits.

Learn about...

PHILOSOPHY

My take on the world of UX - it's all about the "YOU"

CASE STUDIES

A small sample of my philosophy in action

RACHEL MARGOLIS

In nineteen images

PHILOSOPHY

The experience is everything.
Everything is an experience.
Experiences are always about...



“YOU”

Y

The “Y” is all stakeholders (business, customers, colleagues, government) that are involved directly or indirectly in an interaction. It is the “you”.

O

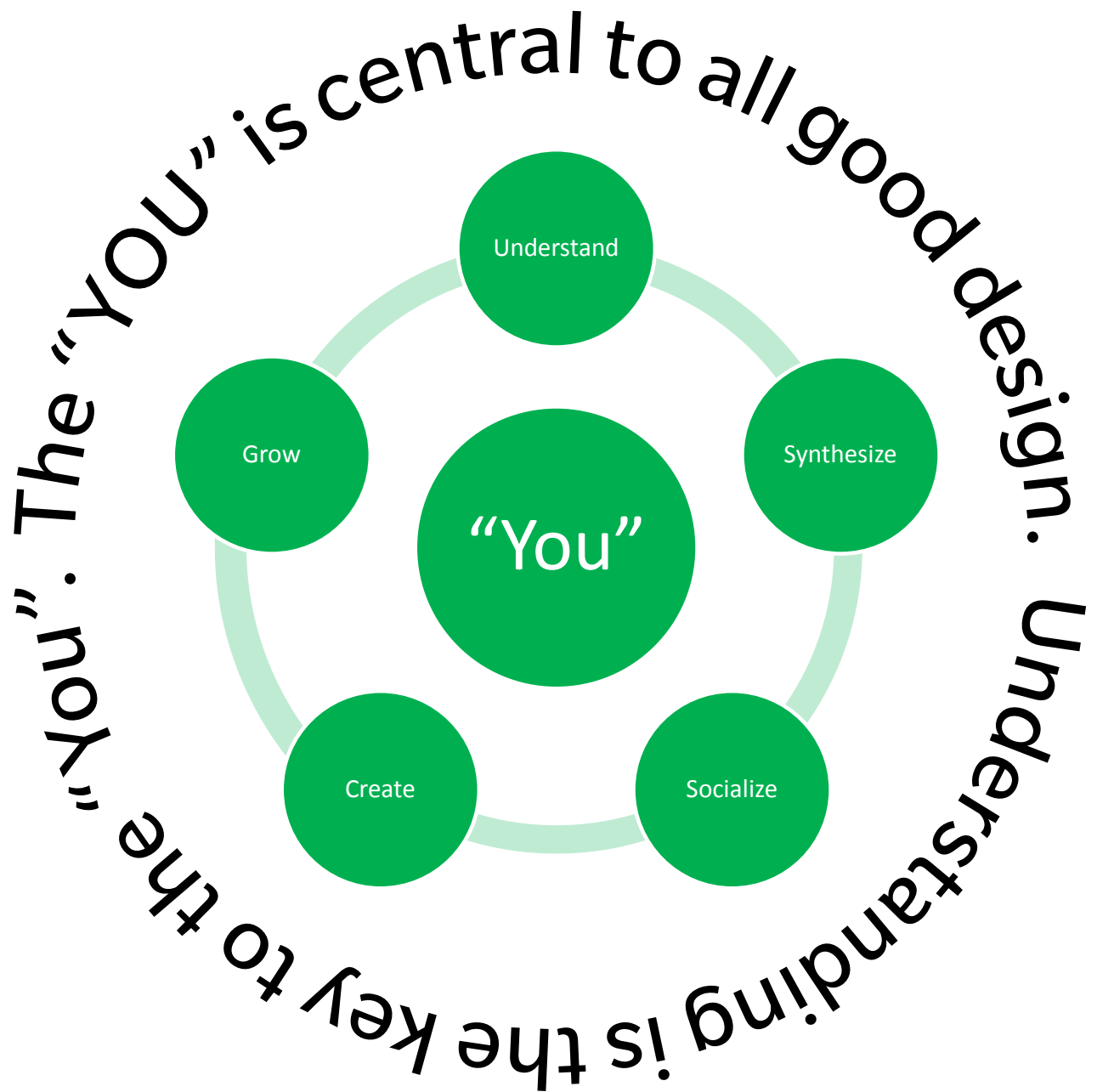
The “O” is the objective. What is the purpose of the project? The objective may or may not align across the audiences. We then need to find compromises.

U

The “U” is about Understanding who you’re creating for. It’s about learning, being inquisitive - being interested and curious in others’ thoughts and objectives.

“You” must be able to understand in order to synthesize. “You” must be willing to socialize and receive feedback in order to create and to grow.

There are many “you”s. Knowing the “You”, Objective and Understanding the “you” informs the foundation and the purpose of all designs.



Influences on my philosophy

There are many, but here's a few:

- Simon Sinek - The Why
- Rory Sutherland - The Perspective
- Ferdinand Foch - The Purpose
- Eliyahu M. Goldratt - The Goal
- Johann Sebastian Bach - The Beauty

There are others, which I will happily discuss... Discussion always leads to more learning and growth!

CASE STUDIES

Employee Engagement

Goal: Bring 2,400 global colleagues siloed in six functional areas together into a unified organization.

Result: Realized a reported increase of 3-points in cross-functional collaboration, 2-points in core engagement, and 4-points in improved management communication.

Goal: Improve the experience and promote the PDP network on MetDental.com, the website used by dentists to interact with MetLife.

Result: Realized an 8-point reported increase in very satisfied for overall website, a 12-point reported increase in very satisfied for ease of use and a 13-point reported increase in very satisfied for clarity of information.

MetDental

Want more...

Always happy to share! [Contact me](#)

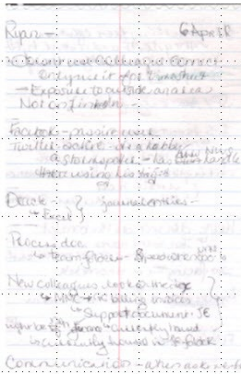
EMPLOYMENT ENGAGEMENT

Goal: After going through a digital and organizational transformation project, merging four operational companies into one overarching Controllership that was broken down by six functional areas that had not worked together before, we needed to build trust, understanding and communication between colleagues that were spread out globally as well as siloed by function.

My Role: Led a matrixed team of 10 people to determine and implement a strategy that would work to bring 2,400 global colleagues together as one team. Work within the constraints of technology and available resources without spending money.



To understand, it’s necessary to listen. The best way to learn what all stakeholders (managers, C-suite, colleagues, business partners) want (or think they want) is to have discussions. By having discussions, we were able to learn the goals and desires of colleagues in different parts of the organization and figure out where there was overlap. I personally conducted more than 20 thirty-minute interviews. In addition, several years of annual survey results were reviewed as well as performed other hands on research, such as card sorts and brainstorming.



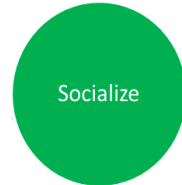
Basic research on how other companies approached the problem as well as other departments within the company was also performed.



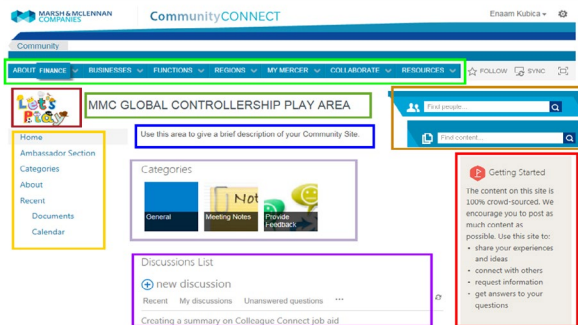
Once all the research was performed, the next task was to report on the findings. We then took those findings and created several personas:

- **Task-oriented colleague** - just wants to do work and go home
- **Curious colleague** - wants to learn what others are doing, but not necessarily interested in sharing
- **C-Suite** - looking to impart “corporate” messages, strengthen collaboration
- **Manager** - wants colleagues to be more productive and make C-Suite “happy”
- **Collaborative colleague** - wants to learn and share

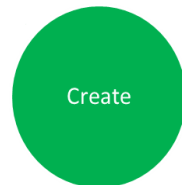
With the creation of the personas, we were able to determine the best method to engage and impact each group to maximize their attention and obtain “buy in”. This was then documented.



During this phase, we obtained feedback on reports, mockups and other documentation through user testing; worked with developers to determine what was possible using existing technology (SharePoint - with strict templates); and formulated strategy and how to implement.



Once all feedback was gathered and digested, we were able to go onto the next phase.



Based on the research and the socialization, we created a strategy that included a centralized website; email; newsletters; town halls; and training local colleagues how to evangelize about the positive results of collaboration.

While we were developing the site, we created excitement through emails and newsletters. We introduced the “ambassadors” across the organization. When we launched, we had good participation rates - and sharing of knowledge.



In the Company’s annual survey, we realized a reported increase of 3 percentage points in cross-functional collaboration, 2 percentage points in core engagement, and 4 percentage points in improved management communication.

We continued to look for opportunities to improve cross-functional collaboration, the technology available and moving curious colleagues to collaborative colleagues.

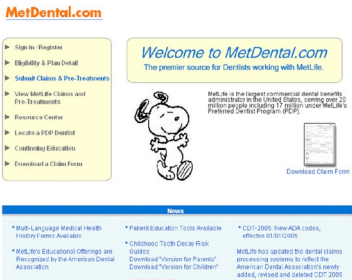
METDENTAL.COM

Goal: Improve the experience thereby reducing calls, promote the Preferred Dentist Program (PDP) network to increase our dental network and reduce payment costs and update the overall look and feel of MetDental.com to align with MetLife branding.

My Role: Responsible for researching, creating and developing the user experience, managing the overall project of the redesign and informing internal teams (Service Centers, Processing, Marketing, Legal) of the changes on MetDental.com.

Understand

During this phase, we reviewed existing internal and external market research, surveys, service center reports to understand trouble areas for MetDental.com users. We also reviewed other carriers Provider websites, at least before sign in. Held meetings with internal teams such as Product, Service Centers, Processing, Marketing, and Development, to understand what Providers were asking as well as what MetLife was trying to promote in order to reduce costs. We also had a focus group of dental managers/administrators and dentists; not to mention speaking to our personal dentists.



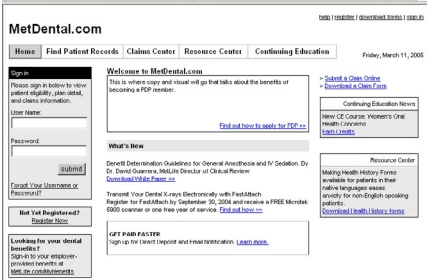
Synthesize

Next steps were to take everything that was learned during the “understand phase”. Through meeting facilitation and brainstorming, we created journey maps, personas, a new information architecture (IA) and layout. After several drawings were made and discussed, we developed a prototype that could be socialized.

Socialize

Ten individuals (nine office managers/administrators & one dentist) were individually interviewed in order to determine the usability the proposed design for MetDental.com. Each individual reviewed key functions of the new site and was asked to provide feedback regarding ease-of-use, content organization, terminology and labeling.

With the new information gathered from the usability interviews, labels were revised, links were moved and requirements were written. The documentation was socialized within the project group to ensure there was agreement.



Create

We launched. By improving the information architecture, putting data in places that Dental offices would think to find it (rather than where we thought we should place it), and making sure information regarding the PDP was emphasized, within weeks, there was a drop in call volume to the service center and IVR. There was also an increase in:

- The number of claims processed through MetDental - reducing the cost to process the claims
- Overall “very satisfied” rose from 39% to 42% (an increase of 8 percentage points)
- Ease of use rose from 33% to 37% “very satisfied” (an increase of 12-points)
- Clarity of information rose from 30% to 34% “very satisfied” (an increase of 13-points)

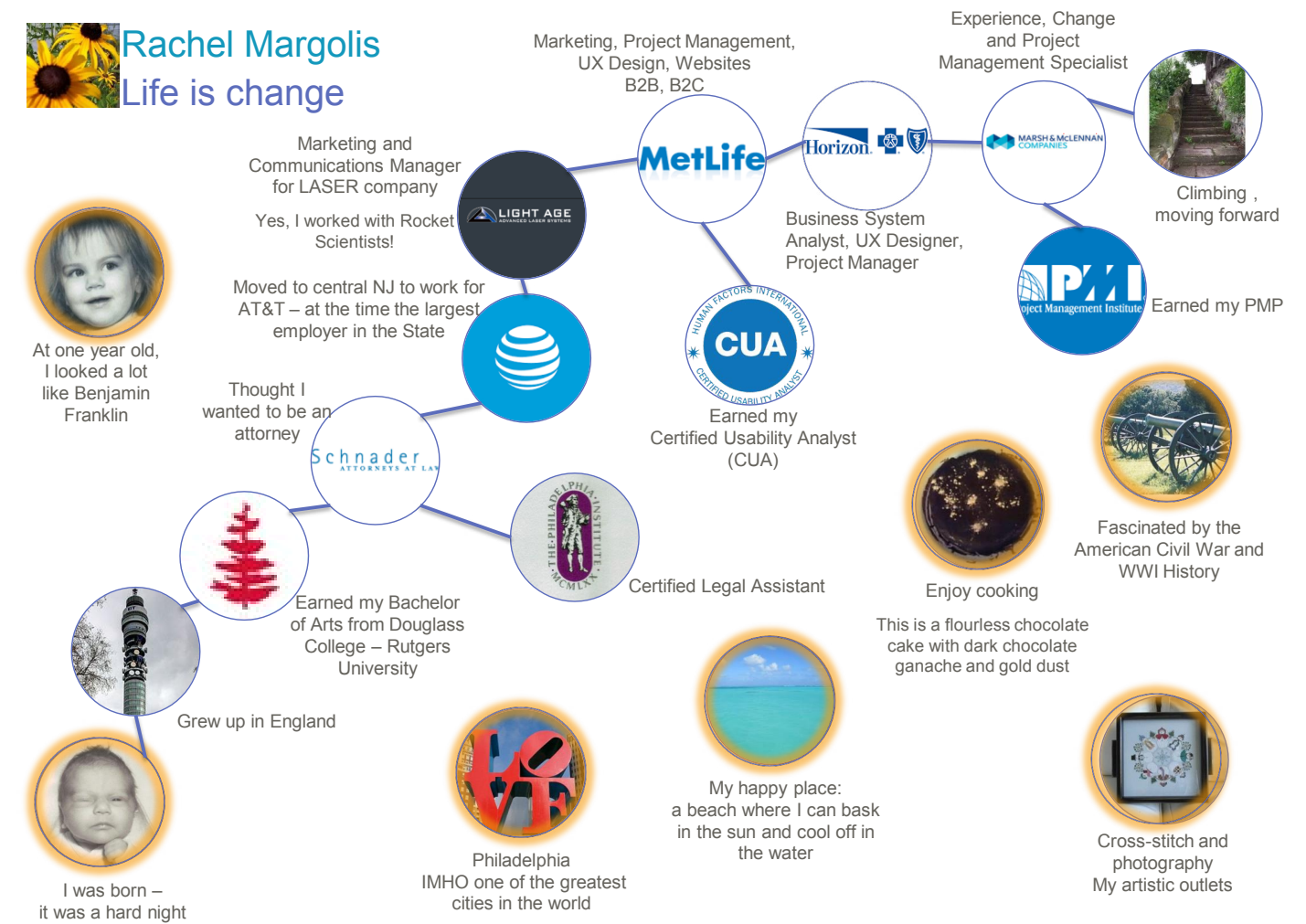
Grow

A year later, internal market research performed found “MetDental.com overall satisfaction (55% “very satisfied” with the website) continued a positive upward trend of the site’s ease of use and functionality that was initiated last year with its redesign.”

In the intervening years, tweaks have been made, there has been no significant changes to the IA or the look and feel of the [MetDental.com](#).



A pictorial of my life



My Résumé



Contact me

If you have any comments or just would like a chat, feel free to contact me:

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[Provide feedback using this quick survey](#)