



Rachel Margolis

Certified Usability Analyst, PMP

Contact me:

Margolis.Rae@gmail.com

[www.linkedin.com/in/
MargolisRachel](http://www.linkedin.com/in/MargolisRachel)

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”



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



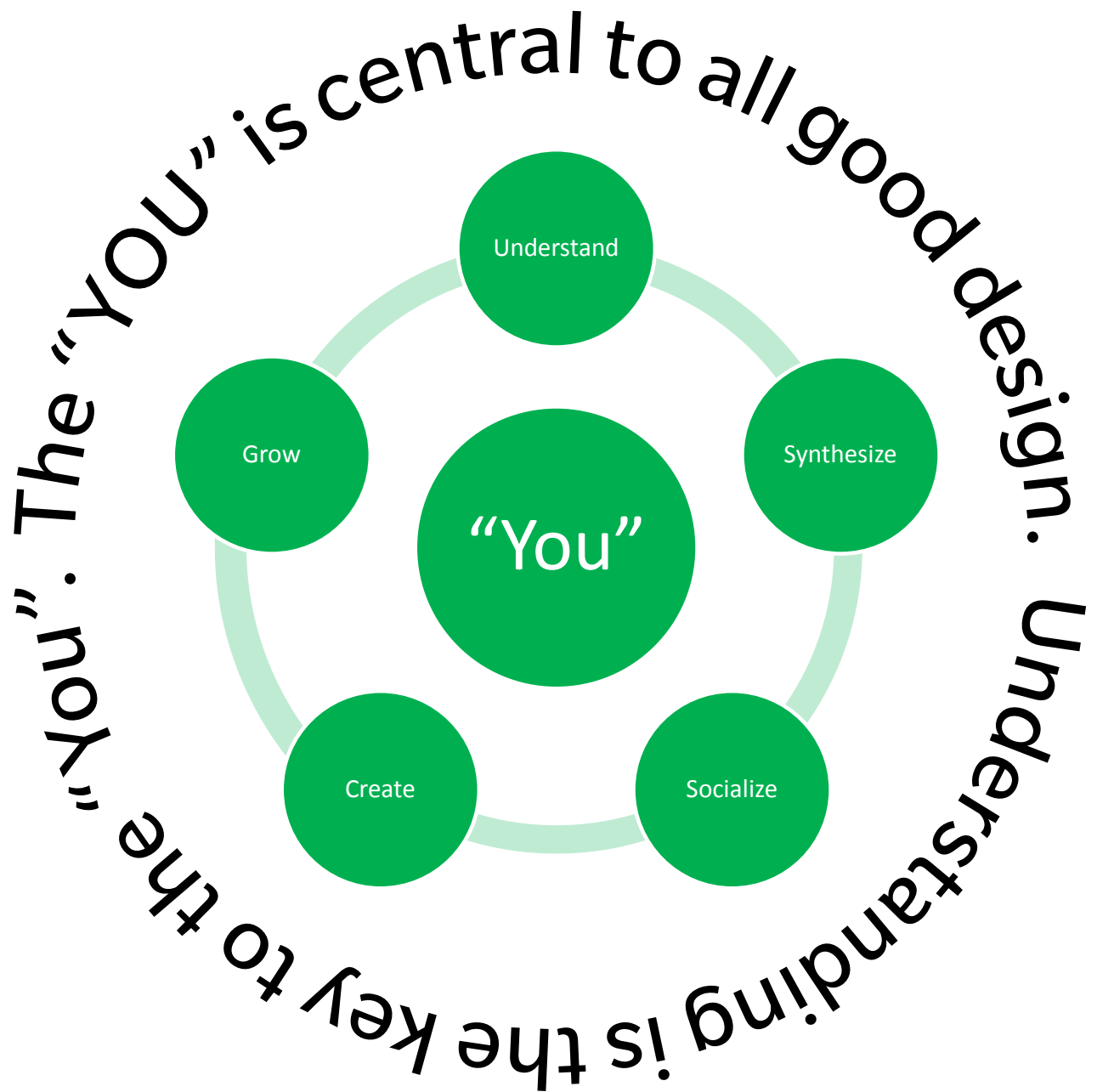
The “O” is the objective. What is the purpose of the project? The objective may or may not align across the audiences. We then need to find compromises.



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

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

Problem: Find the perfect position where I can contribute to the work, improve the client experience and increase revenue

Portfolio

Want more...

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

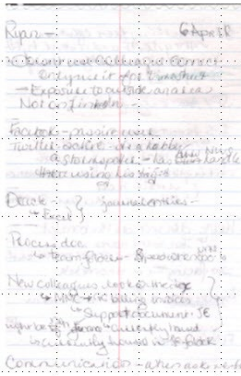
EMPLOYMENT ENGAGEMENT

Problem: 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: Lead a matrixed team of 10-15 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 hopes and desires, as well as where there was overlap. More than 20 thirty minute interviews were conducted. In addition, we also reviewed annual survey results as well as performed other hands on research, such as card sorts and brainstorming.

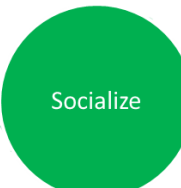


Basic research on how other companies approached the problem as well as other departments within the company was also performed.

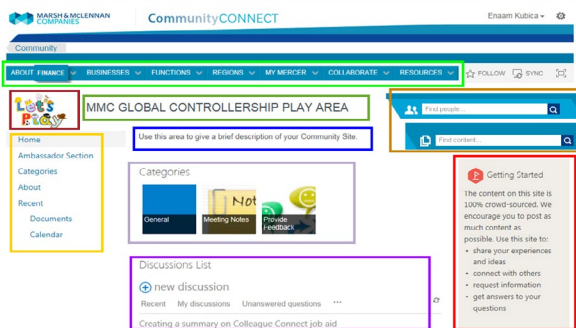


- Once all the research was performed, the next task was to report on the findings. We then took those findings and created several personas:
- **Task-oriented colleague** - just wants to do work and go home
 - **Curious colleague** - wants to learn what others are doing, but not necessarily interested 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; 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.

During the implementation, we checked in to make sure the plan was working and tweaked as needed.



In the Company’s annual survey, we realized a reported increase of 3.4% in cross-functional collaboration, 1.5% in core engagement, and 3.7% 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.

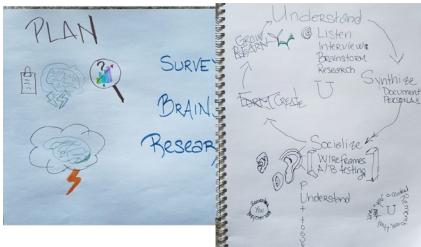
PORTFOLIO

Problem: Having worked on internal projects, that have confidentiality around them, my portfolio had not been maintained. Since I last put my portfolio together, the way portfolios were presented has changed. Therefore, I needed to quickly create a portfolio that prospective employers would see as up-to-date and want to continue the interview process.

My Role: Create a portfolio that would showcase my talents and my personality using the basics that I can share about my work. The portfolio would to be modern and entice prospective employers to want to hire me.

Understand

Reviewed multiple UX Designers’ portfolios, attended an online course, watched several videos and read many articles on the development of portfolios. Thought about my process - how I do what I do, why I do what I do and what that accomplishes - what story does it tell about my work - and who would be interested? I reflected - I asked people’s thoughts...and I did that during the week between Christmas and New Year, a short time span when people were busy and had other things on their plates.



Synthesize

After taking all the information,I looked through materials I had to see what I could use to convey my journey.

I started doodling concepts down. I created a high-level persona. Then I started to create various versions of my portfolio using different methods: PowerPoint, drawing, InDesign, video.



Hiring Manager – Joey Kilrain

Demographics

- Age: 40
- Location: Edison, NJ
- Work: UX Director
- Character: Authentic

Goals

- Hire someone who:
 - Can hit the ground running
 - Fits within the current team
 - Is curious and a problem solver
- Keep morale high
- Build relationships with clients
- Restore a Ford Mustang 1964½

Personality

Introvert	Extrovert
Analytical	Creative
Loyal	Pickle
Passive	Active

Friendly	Clever	Go-Getter
Ambitious	Focused	Humorous
Spontaneous	Accessible	Dependable
Organized	Practical	

Socialize

As normal, I shared my ideas and thoughts throughout the process. I shared my outline and early wireframes with friends to get their input. Never afraid to “guinea pig” my friends or just ask someone at a restaurant; I found feedback using the best guerrilla methods.

I used the feedback to move to the next phase: Create.

Create

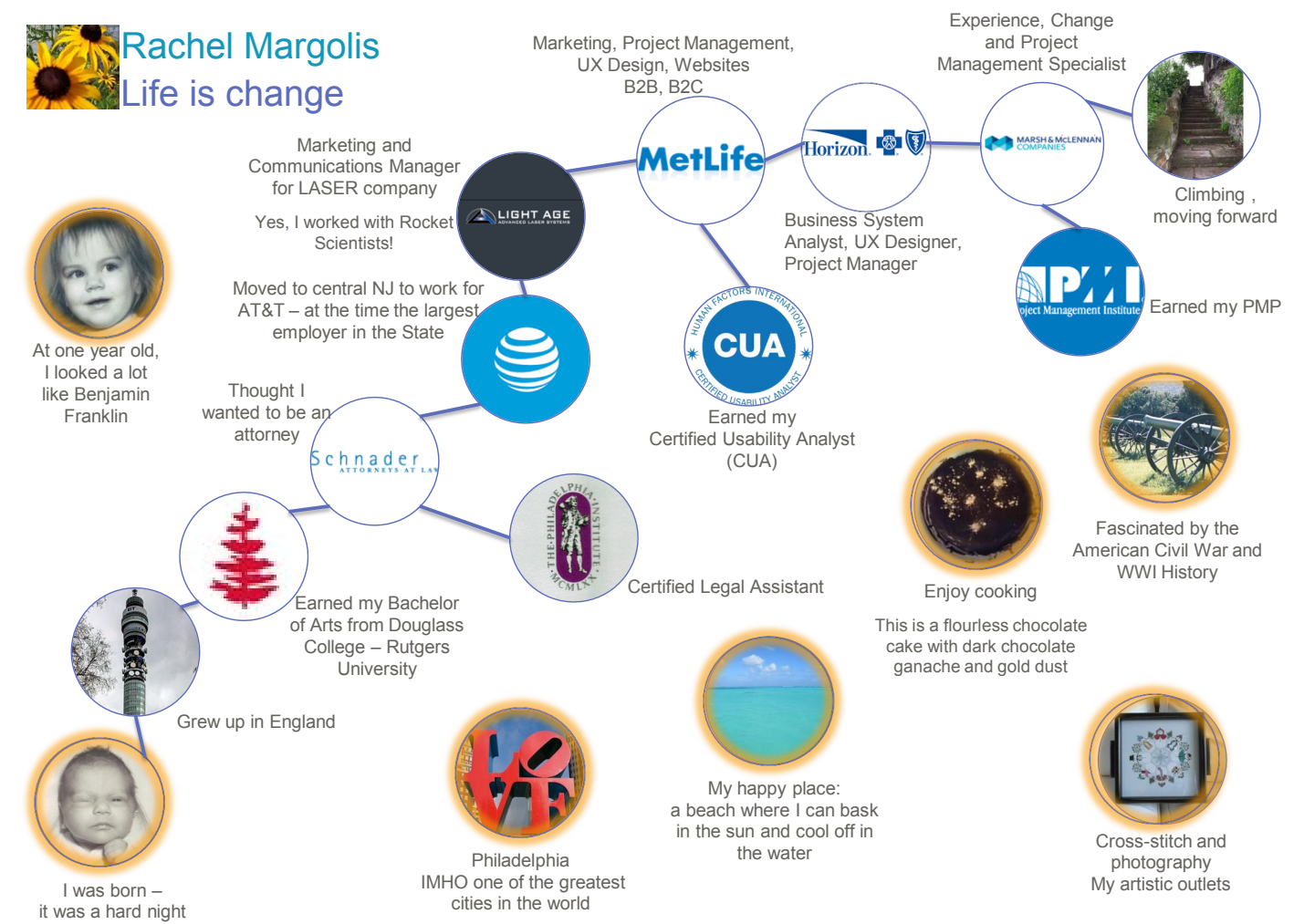
Once I received feedback, I created my portfolio. (Then got more feedback and created the iteration you’re reviewing now!)

Grow

How do you like my portfolio?
[Please provide feedback using this quick survey.](#)

(Yes, the data I gather is used to improve the next iteration.)

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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