



Miguel Ángel Pérez

Design Leadership, Research, and Technology

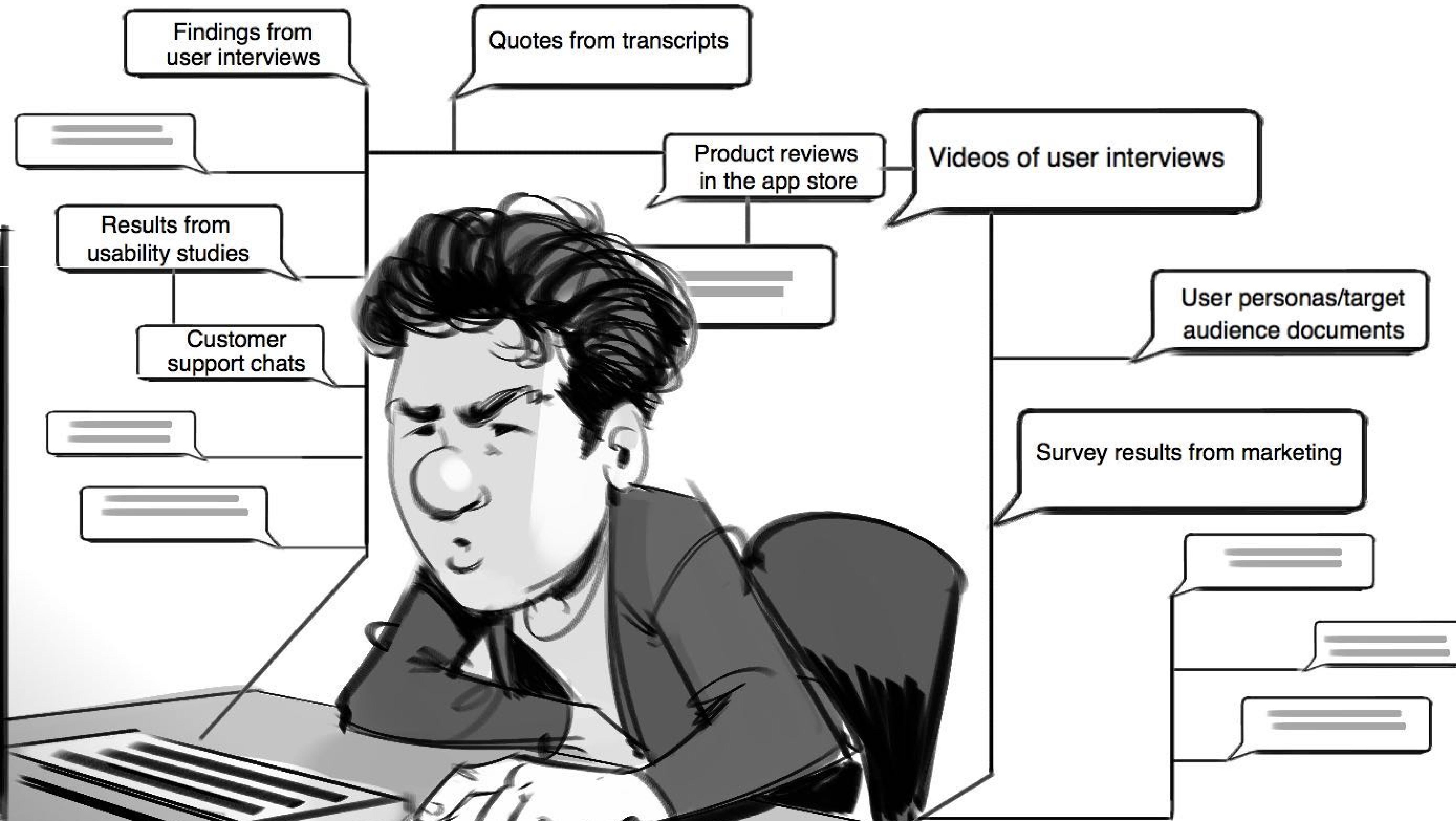
Whether a team is striving to achieve product-market fit, expedite design research, or facilitate sprints and run A/B tests, Miguel helps teams skillfully navigate into the unknown by surfacing people's shared, hidden reserves of creativity and compassion.

Miguel has worked on products and services ranging from B2B healthcare technology to DTC hardware for pets. Since his days developing games as a teenager, Miguel's worn different hats on tech-enabled teams for more than a dozen years. He combines expertise in design research, software development, and data-driven strategy to offer just right engagement for teams of all types and sizes. Miguel uses his background in software engineering to develop tools like SmoothState.js, Nuggetizer, and Affinitizer, which aim to accelerate the pace and adoption of Human-centered Design.



NLP for UX Research

Generating empirical qualitative insights from conversation data



6146... › Guest A › 12:16 - 14:59



HOST A

Were there, were there instances where you were presenting out on your findings and it was just, you know, not being heard or was it such that the timing was so bad that you just didn't feel like it was even the right time to bring up what you've learned?

GUEST A

Yeah. I mean, I think it's a combination of things. Some are, which are my fault and some of which, you know, are the contexts, the things that are my fault for sure are maybe the way in which I presented findings. I think my, my thinking was there's a lot of disagreements with the, with the leadership team. And if I put everybody in a room, it, it, it could lead to things being dismissed. Another, you know, just big meeting. Like I just measured the risks as being greater than the rewards of a group meeting. And so I basically presented my findings individually and I just did it like really friendly, like really casually rather than formally. And I think that looking back in hindsight was a mistake. I think that it would have been a big, a big meeting and by big, I mean, you know, eight to 10 people in the room, you know, that would be our leadership team. And maybe some of the minor managers.

Apply Experience Design across the board because UX researchers deal with people problems, and people's lives change when we get involved in a significant way.

6146... › Guest A › 9:10 - 9:33

Notice our team is twiddling their thumbs and feeling bored and anxious as 90 % of the team that was on the road pre-pandemic are now putting their multimillion-dollar engagements on hold.

6146... › Guest A › 11:28 - 12:15

Wish we were able to do a version 2 or re-engage people for the HR-focused qualitative study because the internal research still has value but our efforts were washed out due to the pandemic.

6146... › Guest A › 12:14 - 12:20

Decide not to present my findings in a group meeting because putting everyone in a room might lead to disagreements within the leadership team and things being dismissed.

6146... › Guest A › 13:21 - 14:17

Realize in hindsight it was a mistake to present my findings to stakeholders individually rather than in a big meeting as individual meetings are casual and informal

6146... › Guest A › 14:17 - 14:59

What

I realize in hindsight it was a mistake to present my findings to stakeholders individually rather than in a big meeting

Why

... as individual meetings are casual and informal

because the rewards were greater than the risks of a group meeting

as individual meetings are casual and informal

because I need the whole leadership team to consider my findings together

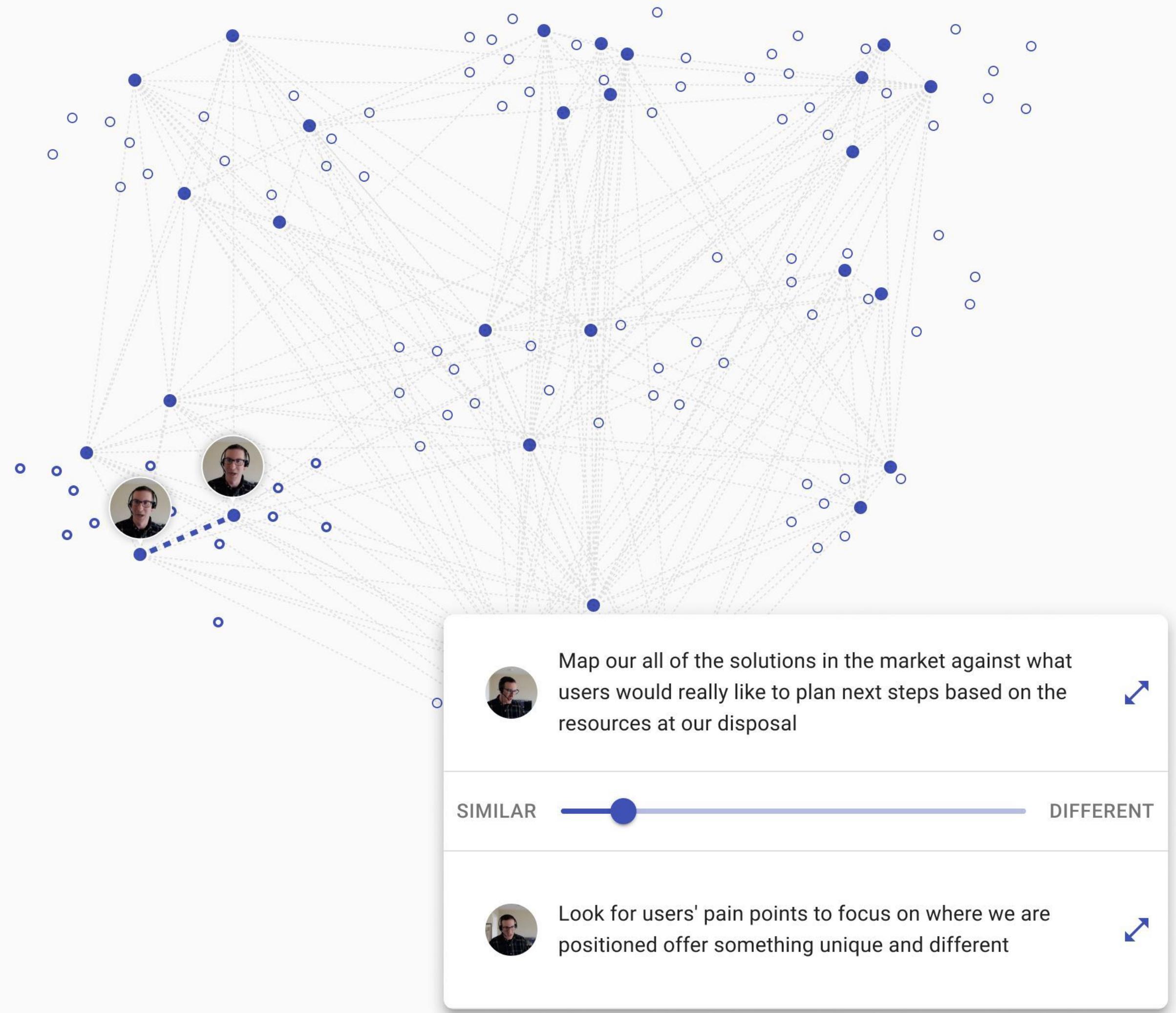
Nuggetizer Export

Profile	Summary	Task	Goal	Quote	Prompt	Type	Clip
Across Time-Zones	Analyze participant responses after the session by tagging and cleaning; identify themes by analyzing research data		Uncover findings through qualitative data analysis	I have like a Goo "When you were Inner Reasoning recdysm@WebNCfXkDQ_b			
Across Time-Zones	Feel frustrated that the timeline stretched on too long between finaliz Address pain points in my own and my team's workflow		Help my team function at its best	Like not totally t I'm curious abou Emotional React recbjrov2kyndfP4t_blue			
Across Time-Zones	Prepare for a session by reviewing the moderator guide and the research Get in the flow of interviewing so I can adapt and dig deeper as needed		Facilitate sessions with users to understand their experiences	So, you know, ju "Thinking back a Inner Reasoning recBjClovRkpeD97f_blue			
Across Time-Zones	Prepare for a session by making sure I know how the interview will flow Get in the flow of interviewing so I can adapt and dig deeper as needed		Facilitate sessions with users to understand their experiences	So making sure t "What'd you do Inner Reasoning recQOxsp09FkvID2_blue			
Across Time-Zones	Come up with questions for the moderator guide and get feedback from Check in with my team members to ensure we are aligned		Orient everyone to what's been learned from research with users	I had created thi And where did t Inner Reasoning recBzFnOBKRByfleA_blue			
Across Time-Zones	Document research plans and share them with the whole team, so the Check in with my team members to ensure we are aligned		Orient everyone to what's been learned from research with users	And those that c "And aside from Guiding Principi recplKQa7gFDLumz_blue			
Across Time-Zones	Adjust the flow of interviews based on my self-assessment of how the Get in the flow of interviewing so I can adapt and dig deeper as needed		Facilitate sessions with users to understand their experiences	Yeah, I feel like t "Once you got in Guiding Principi recjy5kn7W04bCL8_blue			
Across Time-Zones	Feel relieved that after self-reflecting about my first session with users Get in the flow of interviewing so I can adapt and dig deeper as needed		Facilitate sessions with users to understand their experiences	A little bit of like "Once you got in Emotional React recGjduo7tYd2nv_blue			
Across Time-Zones	Collaborate with stakeholders who are in different time zones by askin Check in with my team members to ensure we are aligned		Orient everyone to what's been learned from research with users	So I live in Japan is there anything Inner Reasoning recwRwlo4SWRCavv_blue			
Across Time-Zones	Write a report that can live forever on our internal research blog by the Organize knowledge gleaned in various ways across the company		Make information easier to reference and share	So the job really "You had mantic Guiding Principi recKDCrvdSm01ycrl_blue			
Across Time-Zones	Respond to comments and questions on my slide decks from other re Organize knowledge gleaned in various ways across the company		Make information easier to reference and share	And, or like, the "And have you e Inner Reasoning recb9yr74VFpUWW_blue			
Across Time-Zones	Help a PM in a different location working on a project related to my pa Organize knowledge gleaned in various ways across the company		Make information easier to reference and share	Most recently i g "And are those c Inner Reasoning recgoQsj0M4u4EwB_blue			
Across Time-Zones	Search for research related to an initiative I'm working on to see what Organize knowledge gleaned in various ways across the company		Make information easier to reference and share	I search for stuff "like, how did yc Inner Reasoning recPF7SM85WubIt_blue			
Across Time-Zones	Answer questions about research I did years ago by browsing categori Organize knowledge gleaned in various ways across the company		Make information easier to reference and share	so people might "like, how did yc Inner Reasoning recpw67Hnconfapp_blue			
Across Time-Zones	Scan through research that's newly published to the company blog, ev Deepen my understanding of UX research and design		Learn and grow as a UX professional	I mentioned that "like, how did yc Inner Reasoning recNvInveA2ev0vBG_blue			
Across Time-Zones	Search for a specific topic in a research report using the keyboard short Organize knowledge gleaned in various ways across the company		Make information easier to reference and share	Yeah, it [how I s "And is that like Inner Reasoning rec5Sm5lq2vZo3AO_blue			
Across Time-Zones	Outline what we plan to learn and how, with a research overview for e Prepare questions for guiding interview sessions		Facilitate sessions with users to understand their experiences	So, I mean, for e "And aside from Guiding Principi rec79jeEnY13mJAE_blue			
Across Time-Zones	Combine two sets of questions into one session to both address gener Prepare questions for guiding interview sessions		Facilitate sessions with users to understand their experiences	And so we had a "You mentioned Inner Reasoning recUWytwdINCKohvn_blue			
Across Time-Zones	Review my notes right after sessions to clean up mistakes Organize session notes and assets so they can be easily referenced later		Make information easier to reference and share	Immediately afi is there anything Inner Reasoning recpVSELLyRwGD1LA_blue			
Across Time-Zones	Bounce ideas off others for rephrasing, reordering, or drilling in on car Prepare questions for guiding interview sessions		Facilitate sessions with users to understand their experiences	And I've done th "So curious, wh Guiding Principi recQipjmax9PMU_blue			
Across Time-Zones	Edit my notes after sessions to make them more readable Organize session notes and assets so they can be easily referenced later		Make information easier to reference and share	Notes during the And help me uni Inner Reasoning rec02tbOWavjb12Ex_blue			
Across Time-Zones	Organize my interview notes so that I can easily go back and make sen Organize session notes and assets so they can be easily referenced later		Make information easier to reference and share	So just making a And help me uni Inner Reasoning recSAadTfy6hVeuV_blue			
Across Time-Zones	Share compelling videos of participants in my slide deck if they nicely i Quote users to illustrate research findings		Deliver compelling research findings to stakeholders	It [the slide deck "I'm curious that Inner Reasoning rec4oxo8jXVqiwbY7_blue			
Across Time-Zones	Deliver two slide decks when reporting important research; one to use Communicate strategically according to the context and audience		Deliver compelling research findings to stakeholders	And yeah, some "I'm curious that Guiding Principi recb0NltwQBCjHXT0_blue			
Across Time-Zones	Speak the language of the designers I work with when sharing research Communicate strategically according to the context and audience		Deliver compelling research findings to stakeholders	I work with a bu Why put so muc Guiding Principi recQjHQxEw@NIS_blue			
Across Time-Zones	Share recordings of interviews with just the project team through Goo Organize session notes and assets so they can be easily referenced later		Make information easier to reference and share	the recordings i "Earlier you had Inner Reasoning recopba2pzuuh0Bwbt_blue			
Across Time-Zones	Share session recordings with the project team in a Google drive folder Organize session notes and assets so they can be easily referenced later		Make information easier to reference and share	And then that in "Earlier you had Inner Reasoning rec6Sa6grp49tZdy_blue			
Across Time-Zones	Feel apprehensive when I don't know enough about the space to advise balance discovery research with development		Emphasize the business value of regular discovery research	Like some are be "As you were say Emotional React recK8tosep3TFW9Fv_blue			
Across Time-Zones	Communicate with the project team to align parallel research, balance discovery research with development		Emphasize the business value of regular discovery research	Sometimes we'll need to have our Guiding Principi recDf1u7u7Df2Df2_blue			



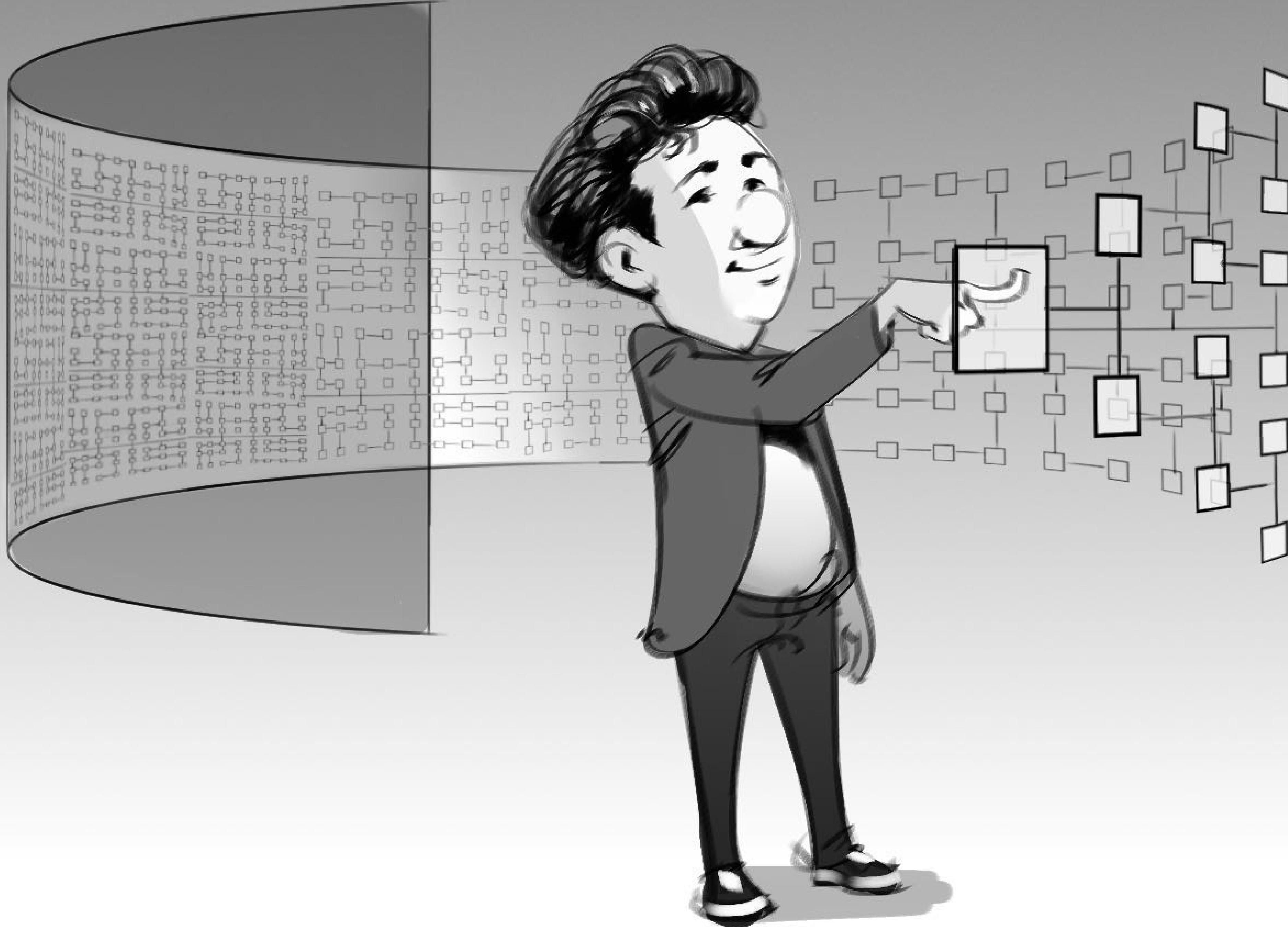
Categories

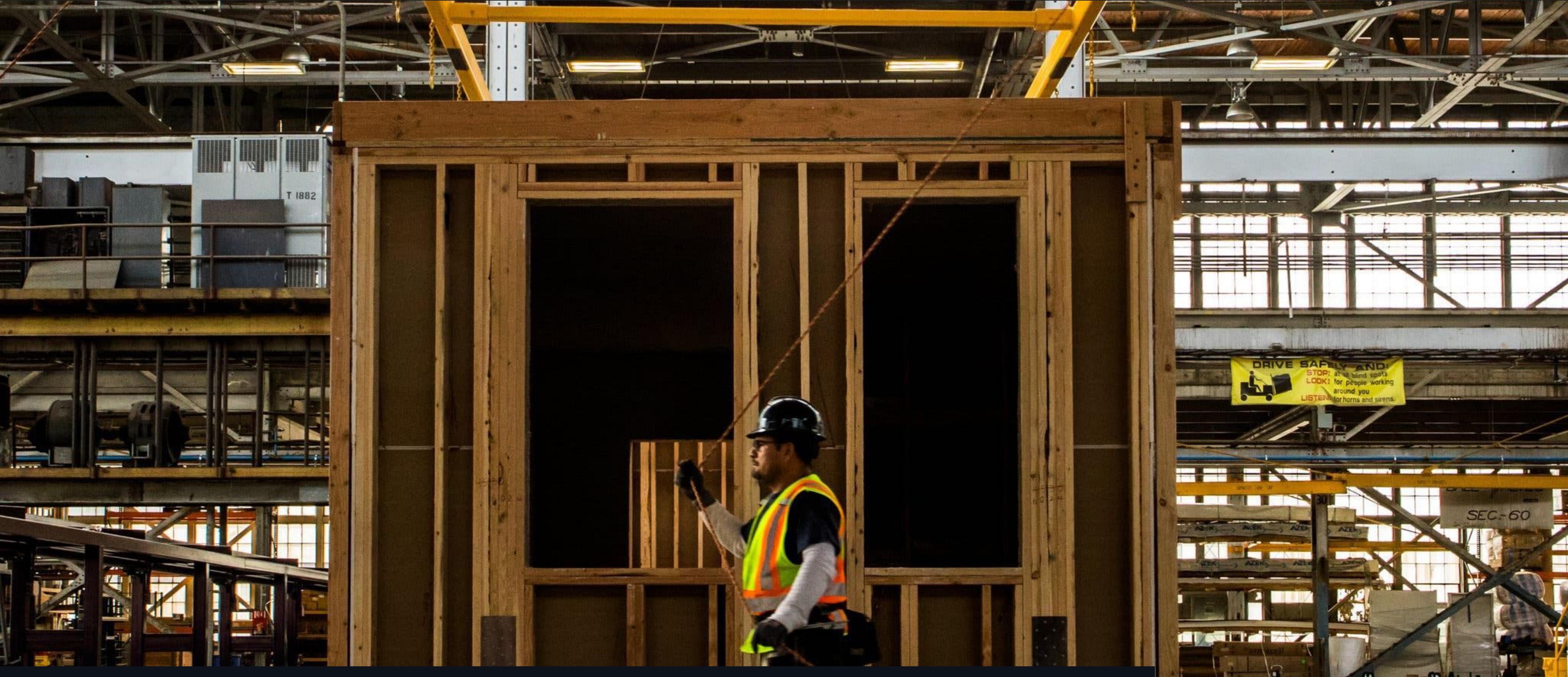
- Conduct deep user research to understand customer needs
- Talk to users to answer questions that come up during product development
- Revise personas and journey maps when there's a change in people's behaviors
- Run quantitative research to size the problems in the market
 - ↳ Pivot based on continued user research to prevent bad investments
 - ↳ Focus on where the organization is positioned to offer something unique to make sure we can best serve our users
 -  Plot our road map strategically, guided by research to make sure we can best serve our users' jobs to be done
 -  Map our all of the solutions in the market against what users would really like to plan next steps based on the resources at our disposal
 -  Look for users' pain points to focus on where we are positioned offer something unique and different
- Bring all the groups in the organization together to get their input and radiate ideas from throughout the organization
- Coordinate interdependent tech teams to develop new features that touch several experiences
 - ^
- Experiment with new methods to become more agile as an organization
 - ^
- Parking Lot



Affinitizer Export

People	Quotes	Goal	Task	Summaries	Clips
8	22 Identify themes by analyzing research data		Uncover findings through qualitative data analysis	Pull session data into Miro to synthesize recf52E8pYxkU88b	
8	22 Address pain points in my own and my team's workflow		Help my team function at its best	Focus on internal optimization to ease recTapfbLJXGBr65q	
7	16 Get in the flow of interviewing so I can adapt and dig deeper as needed		Facilitate sessions with users to understand their experiences	Adjust the flow of interviews based on recjjySxnrWO4bCL8	
7	22 Organize knowledge gleaned in various ways across the company		Make information easier to reference and share	Imagine having a research repository rec6fc15eJMAnkPKJ	
7	19 Check in with my team members to ensure we are aligned		Orient everyone to what's been learned from research with users	Compare the detail captured in my notes recJfw1MwTCMOA	
7	15 Deepen my understanding of UX research and design		Learn and grow as a UX professional	Feel interested in tasks testing colors recYZVOrz8QUBl1hi	
5	10 Communicate strategically according to the context and audience		Deliver compelling research findings to stakeholders	Share survey findings to raise my confidence recmBaI9yGsYVdpW	
5	20 Quote users to illustrate research findings		Deliver compelling research findings to stakeholders	Share compelling videos of participants rec40xx8sXVqlw6Y7	
5	19 Balance discovery research with development		Emphasize the business value of regular discovery research	Balance friction on the team between rec36IOYPPRYZfFvY	
5	12 Prepare questions for guiding interview sessions		Facilitate sessions with users to understand their experiences	Formulate interview guides after interviews recVCrzlOp4NV1Gq	
5	14 Organize session notes and assets so they can be easily referenced later		Make information easier to reference and share	Edit my notes after sessions to make them rec2tbOWav3b12E	
5	7 Learn whatever I need to do my job well		Learn and grow as a UX professional	Look up industry acronyms and lingo recEEpqsk97a6MyN	
4	7 Recognize my personal bias can affect my work		Check my assumptions and the efficacy of my methods	Check my own bias when it conflicts with recbeUWLDMU4fRp	
4	6 Tell a story with my research findings to help people understand and engage		Deliver compelling research findings to stakeholders	Create personas to bring empathy to recN9h1wnXrXEHAI	
4	12 Share progress with stakeholders often		Orient everyone to what's been learned from research with users	Roll out the findings of each research project recHPscks9IdYusa6	
3	5 Look further into issues that come up most frequently in the data		Uncover findings through qualitative data analysis	Prioritize the problems that need to be fixed rec3QTNktdN3mdB	
2	3 Address stakeholder priorities in my presentation		Deliver compelling research findings to stakeholders	Start off my reports by providing my perspective rec2j9eB4hXCcyIg8	
2	2 Screen study participants to have a representative sample		Design UX studies according to project goals	Screen participants for a usability test recBDfAcrO6BYre59	
2	4 Star key information as it comes up during the study so I can easily retrieve it later		Make information easier to reference and share	Identify star-worthy moments in a user test recxmw5vEFmGDYrb	
2	4 Speak up as the voice of our users		Orient everyone to what's been learned from research with users	Participate actively in meetings not just listening recpWsz0gFxaT0Uqe	
2	3 Advocate in the voice of the customer to better understand and refine. Record sessions to document the voice of the user			Bring stakeholders closer to users by recording sessions recP-30WV4tEPBC	





Generative Design for Industrialized Construction

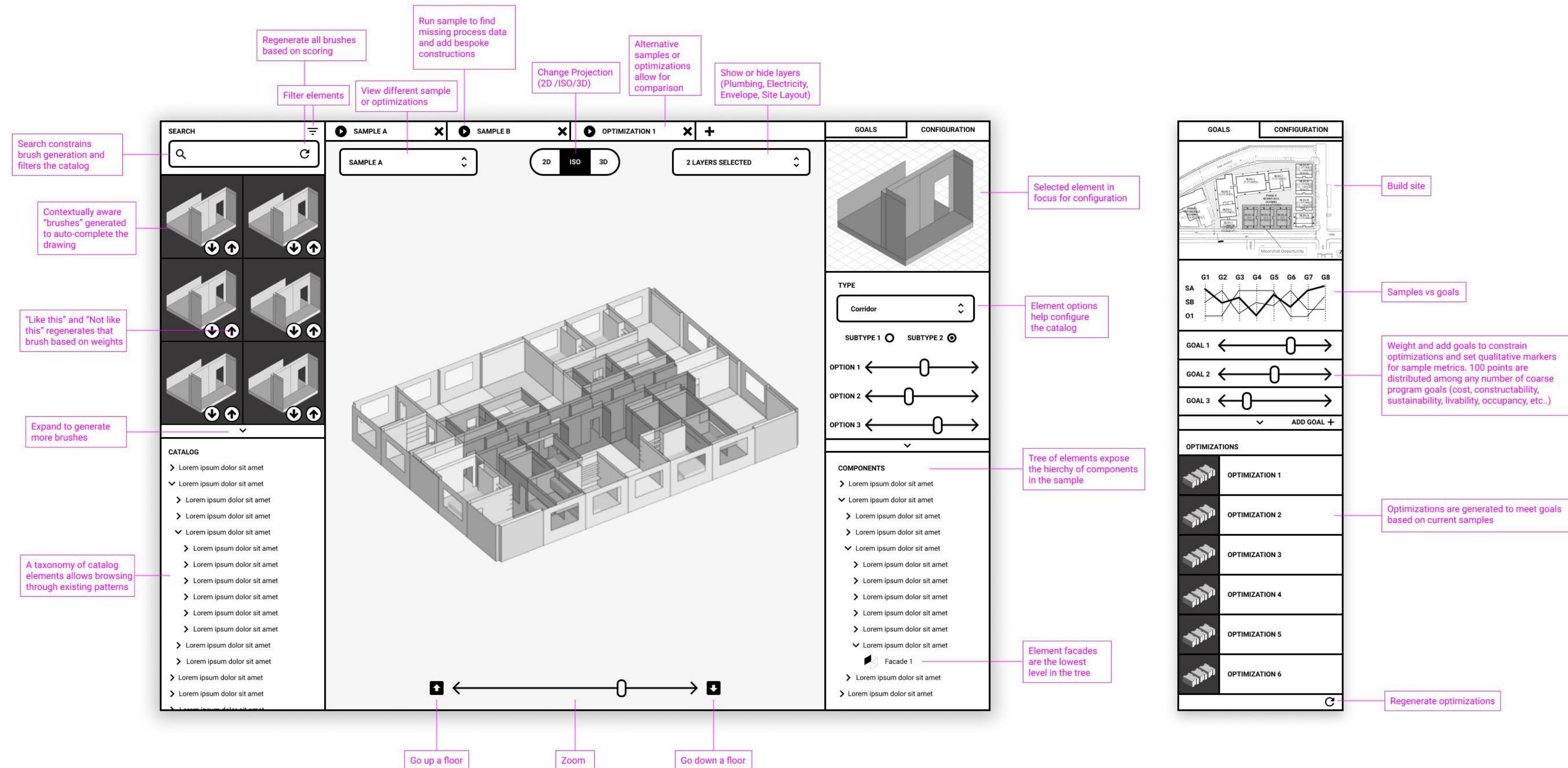
A real-life example of how I used the Nuggetizer & Afinitizer to accelerate HCD

on the factory floor	Count 25		▼ Max 57:56		▼ Filled 25	
odels to illustrate an	Count 83		▼ Max 1:00:00		▼ Filled 83	
ctory efficiency while c	...		▼ Max 42:16		▼ Filled 8	
it the, what levers we're allowing o play with is something that I, would want to be careful with, et's say you say here, you kn...	28a6799	13:56	14:21	Feel cautious about exactly how we allow AORs to play with the levers because the mod widths that we've designed are already pretty close to ...	3. Maximize factory efficiency while considering all the constraints	2. Use virt illustrate an for industria construction
omes to the affordable and e in particular, the name of the ensity. And so these are, these into typically more urban sites...	28a6799	16:32	16:47	Narrow the mod width as much as possible because density is the name of the game when creating affordable and supportive housing, and it will ...	3. Maximize factory efficiency while considering all the constraints	2. Use virt illustrate an for industria construction
st had a project and I'll, pardon e got so many of them going on where depending on the mod a double loaded corridor or fiv...	28a6799	16:47	17:26	Identify the bathroom sink as the surprising determining factor for mod width, because with density as the main constraint, a five-story building ...	3. Maximize factory efficiency while considering all the constraints	2. Use virt illustrate an for industria construction
member if it was *** or **** who p the idea of like these mod d changing mod width and like we, we are combating somethi...	28a6799	29:13	29:48	Regulate mod widths because unlike normal productized elements like cars and phones, our products have to fit into a specific plot and are confined b...	3. Maximize factory efficiency while considering all the constraints	2. Use virt illustrate an for industria construction



Build a virtual prototype for IC

bridge the gap between
clients who want flexible, customizable products and internal systems
set in place for high-performance industrialized construction.



Stage 0: Catalog interfacing

External Architect
A new project has begun in our office for a series of multi-story housing complexes for formerly homeless individuals in Seattle, WA, with high affordably, sustainability and durability standards.
Our office has decided to leverage Partner, DS's their modular construction methods to help us construct the project in the most efficient, affordable, and sustainable way.



Stage 0: Catalog interfacing

The software interface shows a 3D model of a modular building component. On the left, there are several tabs: 'External Architect', 'Architectural Model', 'Structural Model', 'Mechanical Model', 'Electrical Model', 'Furniture Model', 'Interior Model', and 'Architectural Model'. The main panel displays a detailed 3D view of the building's exterior and interior spaces. A sidebar on the right contains various settings and parameters for the selected component.

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Stage 1: Set site and building constraints

External Architect
Now that the goals have been established, I'm able to define the site boundaries and events in the design space.
With the boundaries defined, I review the full program of objectives and constraints that the generation will fit to and share it with the developer.



Stage 1: Set site and building constraints

The software interface shows a 3D site model with buildings and terrain. A sidebar on the left lists 'Site constraints' and 'Building constraints'. The main panel displays a 3D view of the site with various constraints highlighted. A sidebar on the right contains various settings and parameters for the selected constraint.

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Stage 2: Multi-scale generative exploration

External Architect
Now that the design is beginning to have the outcome I want and begin to move towards the outcome I had in our vision. As I am navigating outcomes, I need to understand the tradeoffs, and module scales to understand how each outcome performs against my goals at the different scales.



Stage 2: Multi-scale generative exploration

The software interface shows a grid of generated design variations. The top row shows small-scale site plans, and the bottom row shows larger-scale building models. A sidebar on the left lists 'Multi-scale generative exploration' and 'Module sizes'. The main panel displays a grid of generated designs. A sidebar on the right contains various settings and parameters for the selected design.

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Stage 3: Change management to production

External Architect
Planning, DS's digital Progress, Production & Message, Production & Message, Digital Material & Resources
With the chosen design, we move to the analysis space for more detailed simulations and predictions for operational needs before finalizing the design strategy for moving the project from concept to reality.
We move to Production, DS's industrial management system for managing the project space to review the details of the production process and the production environment to ensure the full potential of the full production to ensure factory capacity. Our digital manufacturing operates without waste, shortening production time for the majority of the processes and the required cell plan.



Stage 3: Change management to production

The software interface shows a 3D model of a building component. A sidebar on the left lists 'Change management to production' and 'Production & Message'. The main panel displays a 3D view of the building component with various production details overlaid. A sidebar on the right contains various settings and parameters for the selected component.

Stage 3: Change management to production

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Stage 4: Incorporate new catalog data

External Architect
As the previous stages for Partner, DS, my job is to track people who are involved from external sources, growing the project from external sources, tracking, using strategic tools and resources, and maintaining the project's progress. This way to increase the efficiency and bring up with our client's requirements.
I am involved in the design, engineering, and construction teams at Partner, DS, to provide relevant - complete, progressive, and innovative features and solutions. My role is to support the design and engineering teams by providing the design performance information, helping to identify and evaluate complex relationships between material and construction methods.



Stage 4: Incorporate new catalog data

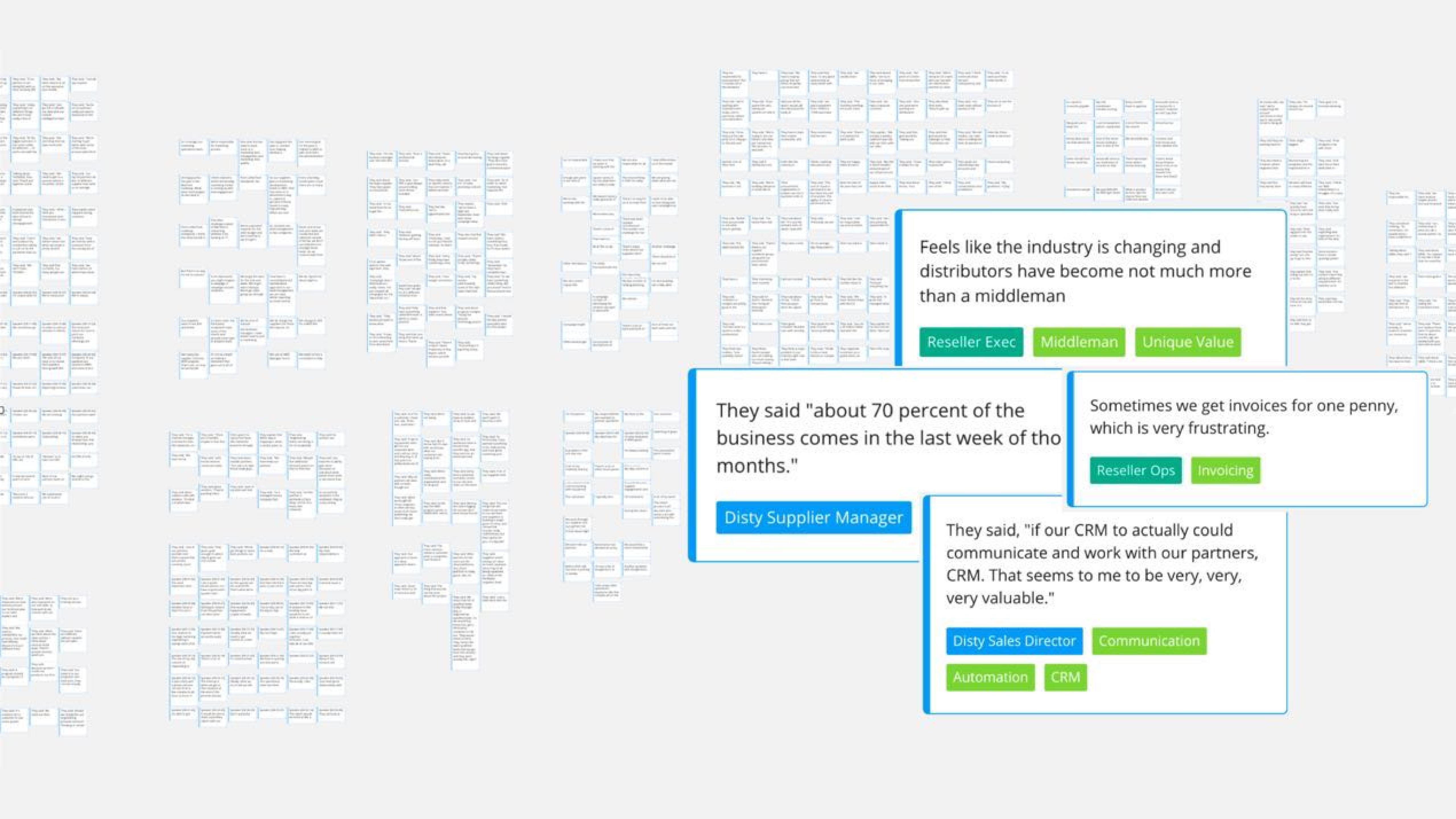
The software interface shows a catalog entry form. A sidebar on the left lists 'Incorporate new catalog data' and 'Materials & Components'. The main panel displays a form for adding new catalog data, including fields for name, description, and various technical specifications. A sidebar on the right contains various settings and parameters for the selected catalog entry.



Piloting user research to guide automation

Digging deep into the experience of buying electronics from distributors





Feels like the industry is changing and
distributors have become not much more
than a middleman

Reseller Exec

Middleman

Unique Value

They said "about 70 percent of the
business comes in the last week of the
months."

Disty Supplier Manager

Sometimes we get invoices for one penny,
which is very frustrating.

Reseller Ops

Invoicing

They said, "if our CRM to actually could
communicate and work with our partners,
CRM. That seems to me to be very, very,
very valuable."

Disty Sales Director

Communication

Automation

CRM

task needed to be done

A pain-point

A desired outcome

Reseller Observation

Supplier Observation

Arrow Observation

gns

Leads

Opportunities

Track Campaign

Generate Leads

Sell Services

Build Alliances

Qualify Leads

Run Campaign

become more effective generating leads

sales and marketing data are not always tightly integrated

leverage marketing res.

They said they need to do better with tracking who they are cold calling, who is being engaged on social channels, and who do you know within each region.

They wish their team had better measurements around how a number of calls and a more tightly integrated approach between sales and marketing.

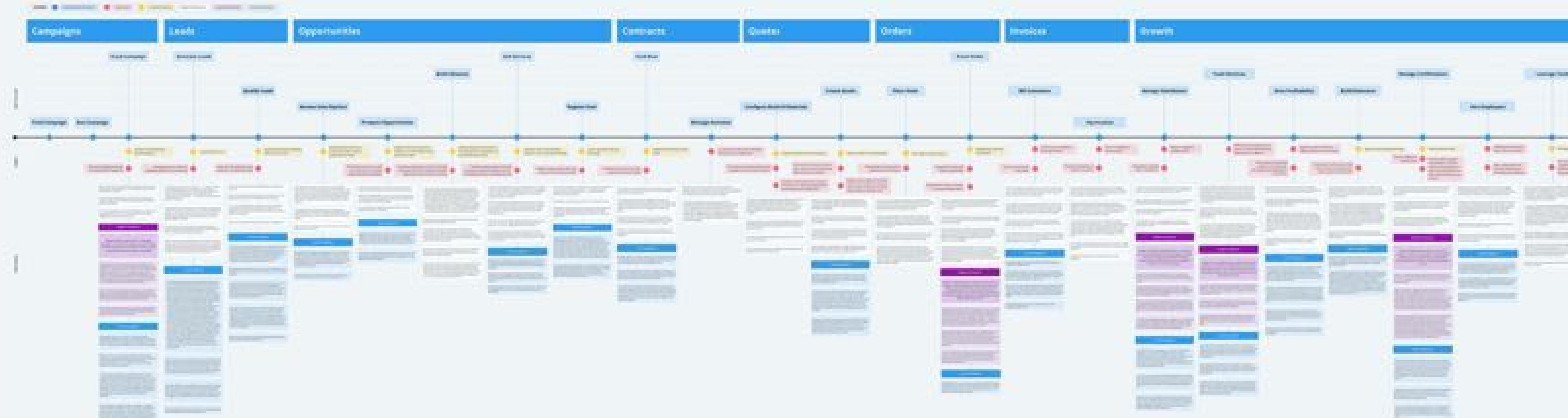
They're measuring the success of marketing by the number of new leads generated from all of our success (traffic to the website, engagement at events, customers, etc.)

Supplier Perspective

Suppliers need to track the ROI of marketing campaigns so that they can diagnose issues and pivot if needed. Reporting on performance metrics related to sales and marketing has been a challenge.

They said "We've only used 50% of the marketing funds provided and did not achieve the desired ROI, and added" since

RESELLER JOURNEY



Reseller Perspective

When we bring on the marketing person, I would like to leverage them along with marketing because they have a lot of really good relationships with the manufacturers, and I think that would be a big help if they could help us manage those MRO or programs or opportunities. All those things those manufacturers do

They said "We are unique because we can talk to the end user on their demand plan and messaging and communications and all that can be done to the end user, all to promote buying from the partners on the supplier. So there's that conflict will want to the manufacturer that need to bring some that we're going to somehow circumvent them. But, we got to go there."

Arrow Perspective

They said "We have called a retrospective four, four, five model. So it's four weeks, four weeks, four weeks for last month, for three months before the end of week the month is when we actually end our month. And then next week is the first. From do you think going to paying do next month last through the remainder of the quarter."

Arrow Perspective

Regarding supplier partners, they use it a lot of our field people are engaged on a regular basis, being in using enhancement type activities, training, or setting up of sessions. Our engineers are in working with them, doing training and so setting opportunities.

They said "At an opportunity level and a deal is registered, we then get involved by helping with negotiations, determinations, and additional discovery & design."

opportunity and a client to date that I just don't have. But have that relationship. Just me give the key to partner with another partner who does have the skills."

The ones who no contract. If we can't do something for a customer because of our partners, being out in the tech community, and doing active in trade associations.

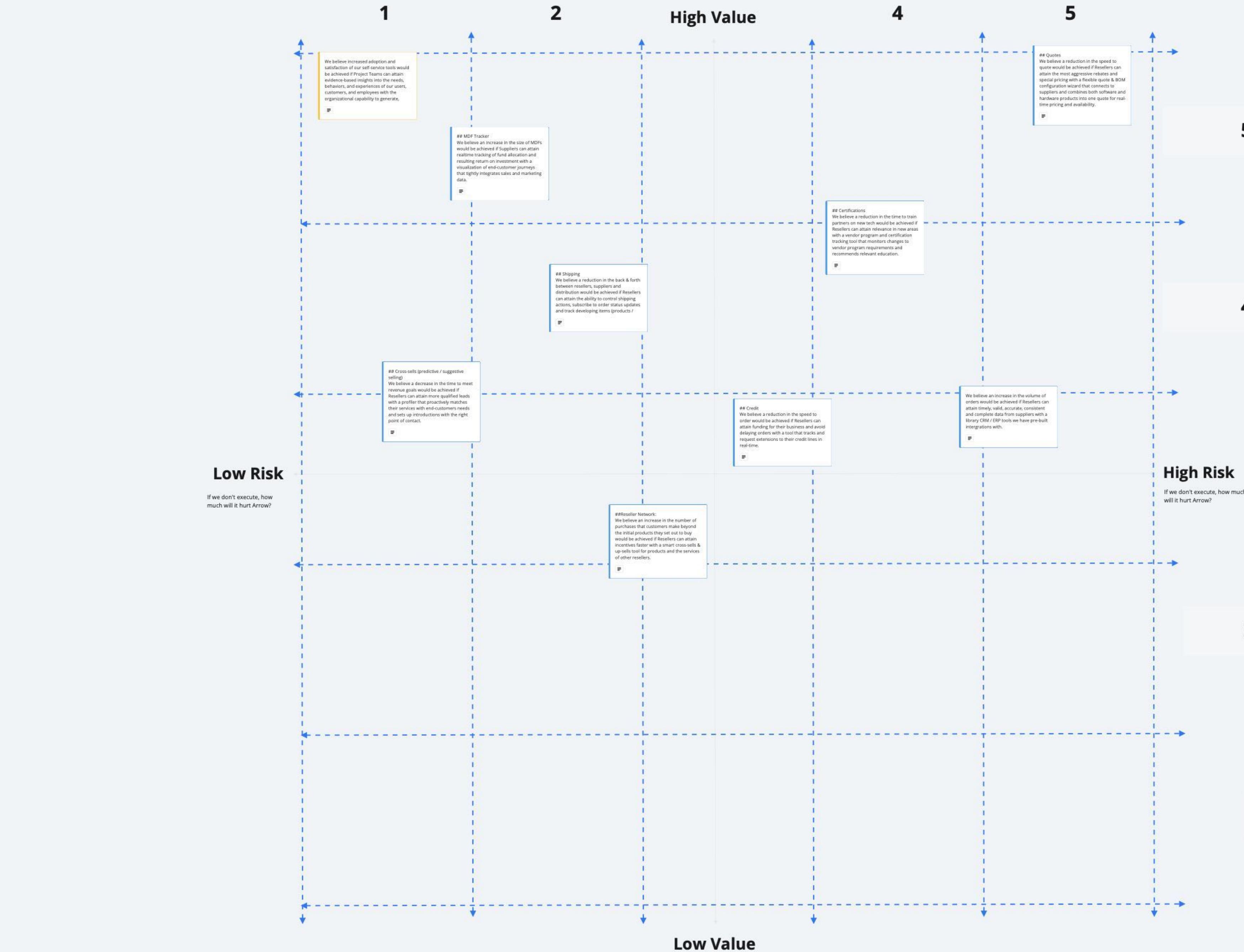
"We pride ourselves on being not all things to all people being very good at the things we are good at, but there are opportunities,

initial model overnight, you're left spending the money up front, but you're getting the money paid out over a longer term." Having "back flow is critical."

Arrow Perspective

They said "As a managed service company that brings all partners with them the back and to provide managed services to our own managed service partners so that they can focus that to sell to their customer."





NEED**Track Orders****DESIGN OPPORTUNITY****Fulfillment Center**

The screenshot shows a sales dashboard interface with various sections and a central modal window.

Dashboard Header: Access, DASHBOARD, PRODUCTS, PRE-SALE, POST-SALE, ANALYTICS, KNOWLEDGEBASE, Search icon, Filter icon, Bell icon, User profile.

Header Buttons: Dashboard, MY SALES, COMPANY OVERVIEW.

Pre-Sale Section: Trending Leads (3 Recent Status Changes), Contracts, Opportunities (35 Recent Status Changes).

Recent Quotes Section: Recent Quotes (2 Recent Status Changes).

Modal Window (360 Quick Search):

- Invoice Number:** 2314124-52 (27 Days Old)
- Details:** PARTNER: CDW Logistics, AMOUNT: \$25,1515, STATUS: CREATED, DATE: 06/29/19
- Tracker:**
 - JUNE 15: Quote (SWS-4134122) - Accepted
 - JUNE 27: Order (O-413412221)
 - 07/07/19 at 2:34PM: Acknowledge (A-413412221)
 - JULY 10: Ship (TR-413412221)
 - JULY 17: Invoice (2314124-52)

Right Side Summary: AVAIL. CREDIT \$323,789, REQUEST CREDIT, 93, 82, Inactive: 35, Ready: 42, Working: 4, In-review: 12.

NEED

Prospect Opportunities

DESIGN OPPORTUNITY

Predictive Cross-Sells & Up-Sells

The screenshot shows a product catalog interface with a navigation bar at the top. The main section is titled "Suggested Products BASED ON YOUR RECENT PURCHASES". It displays two identical product cards for the "TS1107-20DB" development kit.

Product Card Details:

- Product Name:** TS1107-20DB
- Description:** TS1107 Comparator Demonstration Board
- Manufacturer:** Silicon Labs
- Product Category:** Development Kits and Tools
- Stock Status:** IN STOCK (left card) or LOW STOCK (right card)
- Price per unit:** \$5.85
- Buttons:** Heart icon, List icon, Quantity selector (set to 1), Add to Quote button with a shopping cart icon.

“Because of his tenacity, and attention to detail, we were able to take an enterprise application from ideation to release in under 6 months.”

— UI Designer & Developer

“Miguel came in day 1 and with him he brought a wealth of knowledge and expertise to the team.”

— User Experience Design Lead

“We have everything from start to finish of what the vision is, what we need to do and why we need to do it.”

— Product Manager

“He is very engaging, approachable, and we trusted him to interview our customers on our behalf to get a true unbiased voice-of-the-customer.”

— Director of Business Operations



Establishing a Design Center of Excellence

Transitioning work in-house and gaining executive buy-in for HCD

Transition design work in-house

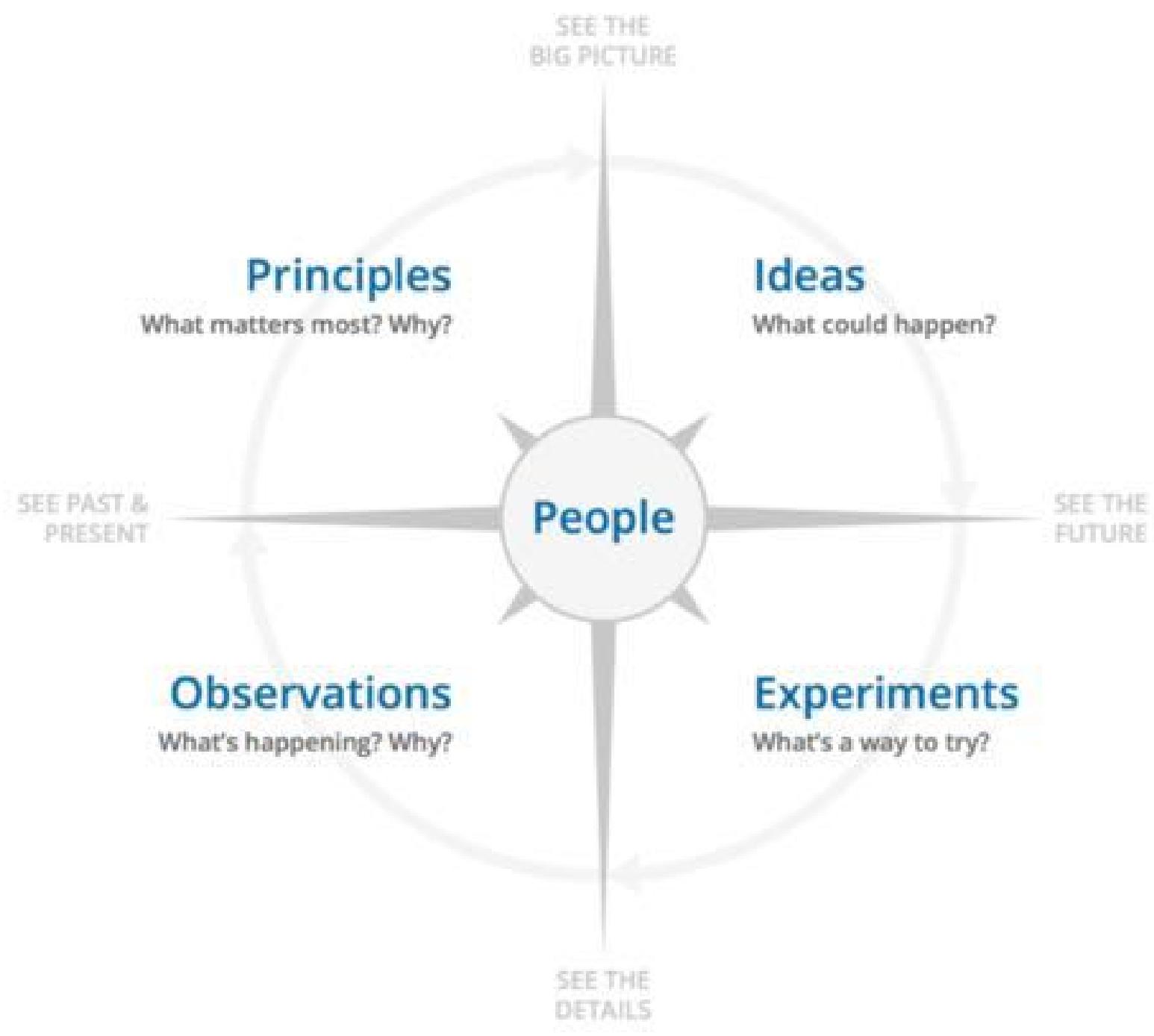
Successfully transitioned the design work in-house and terminated the relationship with the external vendor. Partially transition the work in house, pending hiring 2 staffers

Outcome

- Developed internal capabilities for design
- Developed a framework for defining internal design goals, planning and prioritizing
- A predictable cadence of delivery
- Reduction in total spend on design

Methodology

1. Access Onboarding & Compliance
2. Stakeholder Interviews
3. Backlog Creation & Prioritization
4. Transition Alignment
5. Design Support Costs & Equipment List
6. Job Descriptions & Compensation Analysis
7. Design Team Business Case
8. Transition Design Assets
9. EC Contributions & Bug Reporting Guidelines
10. EC 1.0 Release



Stakeholders Projects Workstreams Sprints Experiments Data Observations

All Grid Hide fields Filter Group Sort Color ...

	A Name	Prior...	Project	Time Criticality	Impact	Risk
1	[Redacted]	3	[Light Blue]	Low	High	Medium
2	[Redacted]	8	[Light Blue]	High	High	Medium
3	[Redacted]	8	[Light Blue]	High	High	Medium
4	[Redacted]	8	[Light Blue]	High	High	Medium
5	[Redacted]	8	[Light Blue]	High	Medium	Low
6	[Redacted]	13	[Light Blue]	High	High	Low
7	[Redacted]	8	[Light Blue]	High	Medium	Low
8	[Redacted]	8	[Light Blue]	High	Medium	Low
	[Blue checkmark]	8	[Light Blue]	High	Medium	Low

Completed Experiments

Every two-week sprint we run 2-3 experiments designed to gain alignment, test assumptions and bring ideas to life.



Business Modeling
Scenarios
Review Prototype V1

Business Modeling
Scenarios
CDE Prototype V1

Field Guide
Call Center Visit & Retro

Client Logo Review
UM Proto-personas
Okta Landing Page

Visual Audit
Heuristic Evaluation
Implementation Plan

Vantage Lite Wireframes
Field Guide

NLP Sales Demo
Field Guide
Recruitment Screener
Contextual Inquiry
Competitor Review
Review Prototype V2

CDE Sales Demo
Field Guide

Icon Graphics
Stakeholder Interviews
Governance Diagram

UM Landscape Analysis

Usability Testing A
Anthem Demo
Review Prototype V3
Usability Testing B
Selection Ideation
Selection Prototype V1



NLP Simplification

User Research Insights

1. Name & DOB
2. Dates of service
3. Known conditions
4. Reviewers need to capture conditions that NLP may not have identified
5. Leave a review unfinished
6. Mistrust of Machine Learning
7. Pages vs page highlights
8. ICD vs HCC Codes

The screenshot shows a medical chart for a patient named James Doe. The interface includes a navigation bar with 'Back to My Charts', a search bar, and buttons for 'More Precision' and 'More Highlights'. Below the navigation is a section for 'Conditions' and 'Validation'.

Conditions:

- Page 4:
 - Medicare HCC88 - Angina Pectoris
 - Medicare HCC96 - Specified Heart Arrhythmias
 - Medicare HCC96 - Specified Heart Arrhythmias
 - Medicare HCC111 - Chronic Obstructive Pulmonary Disease
 - Medicare HCC111 - Chronic Obstructive Pulmonary Disease
 - Medicare HCC85 - Congestive Heart Failure
- Page 5:
 - Medicare HCC96 - Specified Heart Arrhythmias
 - Medicare HCC85 - Congestive Heart Failure
 - Medicare HCC111 - Chronic Obstructive Pulmonary Disease

Validation:

- ICD10 Code: ICDXX.XX Heart > Arrhythmias > Vascular
- Past Medical History
- Signature Present
- Source
- Facility
- Patient Name: James Doe
- Patient Date of Birth: 10/15/2018
- Patient Date of Service: 10/15/2018
- Provider: David Goodhealth, Type: MD

Action Buttons:

- ACCEPT
- REJECT

Annotations:

- Navigate or adjust view:** Points to the search bar and precision/highlight controls.
- Control ML Threshold:** Strikethroughed annotation.
- Collapse or browse findings:** Strikethroughed annotation.
- Navigate to or add custom:** Strikethroughed annotation.
- Search for codes with 3M API:** Points to the ICD10 code input field.
- Accept or reject the finding (reason must be given if rejected):** Points to the 'ACCEPT' and 'REJECT' buttons.

James Doe

Date of Birth
03/21/1932

Dates of Service
03/21/2017 - 04/21/2017
Project
ABC Medicare Review

Known Conditions
22 - Morbid Obesity
34 - Chronic Pancreatitis
40 - Rheumatoid Arthritis and
Inflammatory Connective Tissue Disease
[<See more >](#)



1 / 5

[Review Conditions](#)

[Capture Conditions](#)

James Doe

Male DOB: 3/21/1932

04/01/2016 - Office Visit: office visit

Provider: Jane White MD

Location of Care:

Cardiology Office Visit Note

Patient Review

Date of service: 04/01/2016 11:16 PM

Impression & Recommendations:

Problem # 1: CAD (ICD-414.00) (ICD10-I25.10)
jaw pain with exertion, had negative cath in 2012 in the setting of chest and jaw pain
will get a stress test
cardiac meds

Problem # 2: ESSENTIAL HYPERTENSION (ICD-401.9) (ICD10-I10)
elevated blood pressure today, he did not take his medicine yesterday or today, discussed the importance of compliance, I suspect his episode could be related to hypertension.



Capture Conditions

Service Start Date

04/01/2017

Service End Date

04/01/2017

Facility Type

Hospital Inpatient Other

Document Source

ABC Medicare Advantage Pro

Provider Signature

Electronic

Signature Status

Acceptable

Provider Name Present

Yes

Provider Credentials

Yes

Page Range

1-2

ICD CODE & DESCRIPTION

PAST MED. HISTORY

Search ICD

No

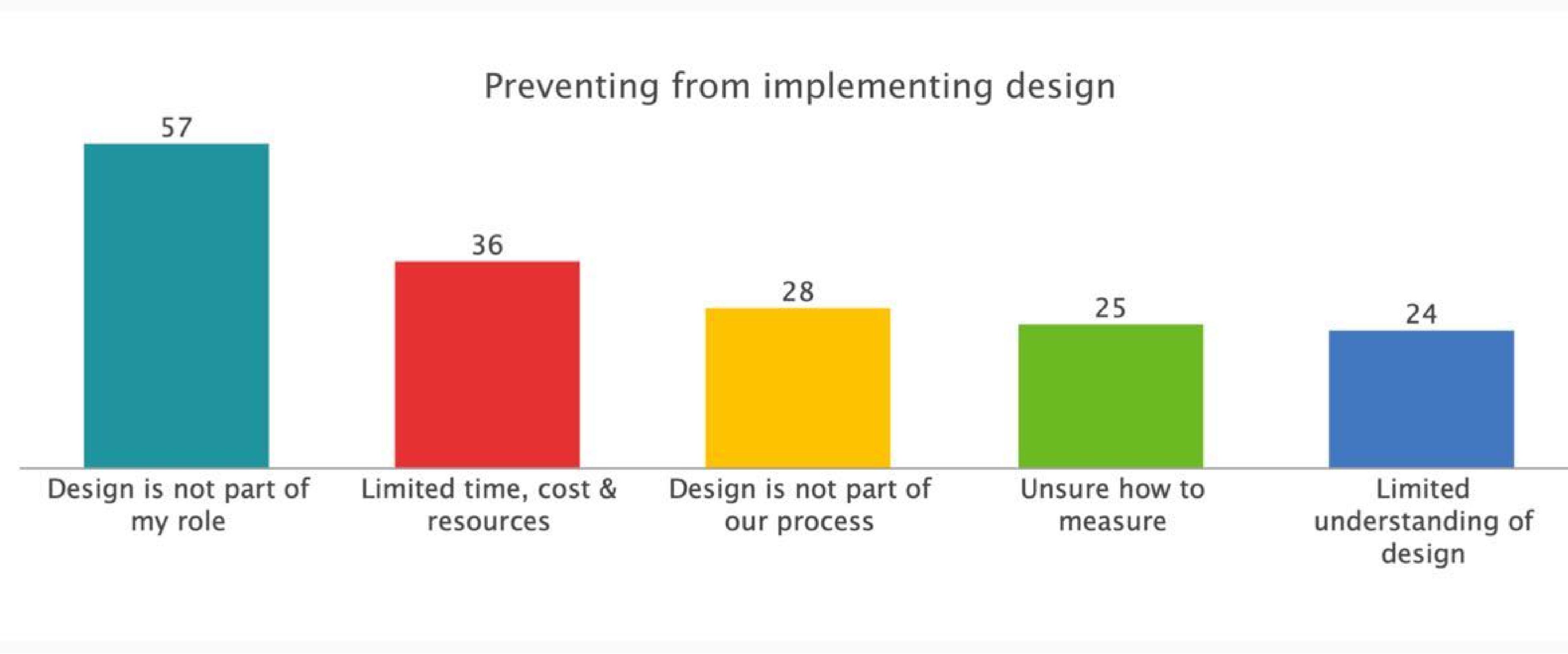


[Cancel](#)

[Save](#)



Learnings from open-ended responses: Design is not explicitly part of the work teams and individuals are expected to do. There are time, cost, and resource constraints to implement. Lack of clarity on how to implement and measure design practices. Lack of awareness of design, its full value and how it can be applied to daily work.



What do we do?

Design is a strategy-making process that uses research and rapid-prototyping to systematically test new ideas, decrease our time to market and reduce the risk of visible failure. We believe that growing our internal capabilities for design will increase sales and end-user productivity while reducing internal rework, and lowering the risk of building solutions without market fit. The DCOE helps educate and advocate for the value of design across the organization through outlining best-practices, training staff on methods, and defining success metrics. We seek to integrate this work into the day to day workflows of teams by providing a path to improving stickiness, satisfaction, referrals, and the lifetime value of clients.

Our strategy will focus on working with specific teams likely to apply design and demonstrate the most value. We'll also let people self-select into the program by attending trainings and using the resources we provide to improve design maturity on their teams. Depending on needs, these resources could include playbooks, standards, pattern libraries, prototyping tools, and research software. The DCOE is committed to building practices through quarterly training from an external design expert to monthly lunch-and-learns with our internal design facilitators. The DCOE will model behaviors and provide guidance, but will not be a bottleneck to outputs. Our focus is providing Fellows a clear path of how to generate evidence, outputs, and outcomes. Our success is measured by the number of fellows actively collaborating with the DCOE and how well their teams are applying design to improve our products, services, process, and/or position through user research and rapid-prototyping.

What constrains us?

The DCOE's most significant risks to success are alignment, buy-in, the ability to open access to our buyers and users for research, and how quickly we can improve organizational design maturity and be able to measure ROI. Around these risks include core design team's small size and limited bandwidth, risks to finding and hiring design trainers with the right experience, conflicting organizational values and overall expectations around short and long term impact of the DCOE program. DCOE's major obstacle is a lack of awareness regarding what design is and why it's important and teams having little tolerance for being forced to make large investments of time into something they don't understand.

Design

Center of Excellence

Fellows

Design Fellows want to work with the DCOE to influence how we apply design across the organization. They have an interest and aptitude for design and care about using company resources effectively to solve buyer and end-user problems. They are pragmatic problem solvers that are intentional about what they choose not to build as much as what they do. Fellows work in various roles across the organization but are similar in that they are empathetic to our buyers and users and demonstrate outputs as part of a greater strategy and outcome.

Stakeholders

Our most valuable stakeholders include the Inovalon ELT, buyers (decision maker to buy product/service) and end-users of our product and services. In the short term, we want to align with ELT on the value of our approach to define standards, develop a playbook and create a shared database of insights to help improve our products, processes, and position. In the long term, we want to help teams demonstrate the impact of changes in user behavior on revenue, involve key stakeholders in the design process early, and find efficiencies by benchmarking the user experience.

How do we communicate?

The DCOE is an advisor, which grows the design maturity of teams across Inovalon. We share resources and standards for gathering evidence, generating insights, and improving our products, services, processes, and/or approach. The DCOE communicates through training and mentorship with internal teams which includes modeling the behavior of user interviews, usability testing, and other strategies with external stakeholders. We share knowledge through the creation and distribution of a playbook, service standard, and a client insight database. Fellows will advocate for participation in the DCOE by sharing success stories and building relationships with decision makers. In addition to self-selection, the DCOE will proactively engage with teams that have been prioritized as valuable design opportunities at Inovalon.

What constrains us?

The DCOE's most significant risks to success are alignment, buy-in, the ability to open access to our buyers and users for research, and how quickly we can improve organizational design maturity and be able to measure ROI. Around these risks include core design team's small size and limited bandwidth, risks to finding and hiring design trainers with the right experience, conflicting organizational values and overall expectations around short and long term impact of the DCOE program. DCOE's major obstacle is a lack of awareness regarding what design is and why it's important and teams having little tolerance for being forced to make large investments of time into something they don't understand.

How are we structured?

The DCOE's Core Team is composed of design experts responsible for training, facilitating design, developing frameworks and tools. Our Executive Sponsors are responsible for maintaining alignment with the ELT and helping the program overcome change management barriers. Our mission is to give teams a clear path to generating insights about our buyers and users with Design Fellows acting as advocates and initiators of design through user research and rapid-prototyping. We seek to grow the percentage of employees who lead or participate in user research each month building the team's design maturity. We set goals by working with our Sponsors to align with the ELT and take into account change management risks and concerns. Our initial goals are:

- Align with ELT on the plan for tracking and measuring design maturity
- Schedule and implement training through an external design facilitator
- Identify Fellows (pre-selection with product matrix and self-selected)
- Promote the DCOE across the organizations
- Increase the number of active Design Fellows
- Increase the quality of work using the Design Maturity Model

Milestones & KPIs

Traction: how many are completing the process quarterly

KPI	Acquisition	Activation	Retention	Referral	Revenue
Outcome	Number of new nominees or volunteers / quarterly	Number of nominees that pass basic training / quarterly	Number of Practitioners generating UR Insights / quarterly	Number of nominations that turn into Design Practitioners / quarterly	Number of Practitioners with reported Impact on Profit or Revenue / quarterly
Milestones / Outputs	Promotion & Intake	Design Trainings	Research Repository	Nomination Form	Case Studies

Viral coefficient: number of new practitioners an existing practitioners generates.

“Miguel had a tough job trying to transform an existing Agile SDLC culture by integrating the power of design thinking into product creation. Throughout the project Miguel demonstrated endless patience and enthusiasm for sharing his knowledge to evangelize design within the organization. Miguel has a knack for spotting raw design talent and is an advocate for investing in those individuals to help them rise to their potential.”

— Senior Director, Platform Solutions

“It is no small task to add a new enterprise-wide discipline to an organization, especially one that is as dynamic, aggressive and striving to mature in numerous areas. I appreciate the struggles, perseverance, and small wins you faced each day. Those are all necessary building blocks to change. Thank you for your initiating the movement and we'll be sure to continue the advancement.”

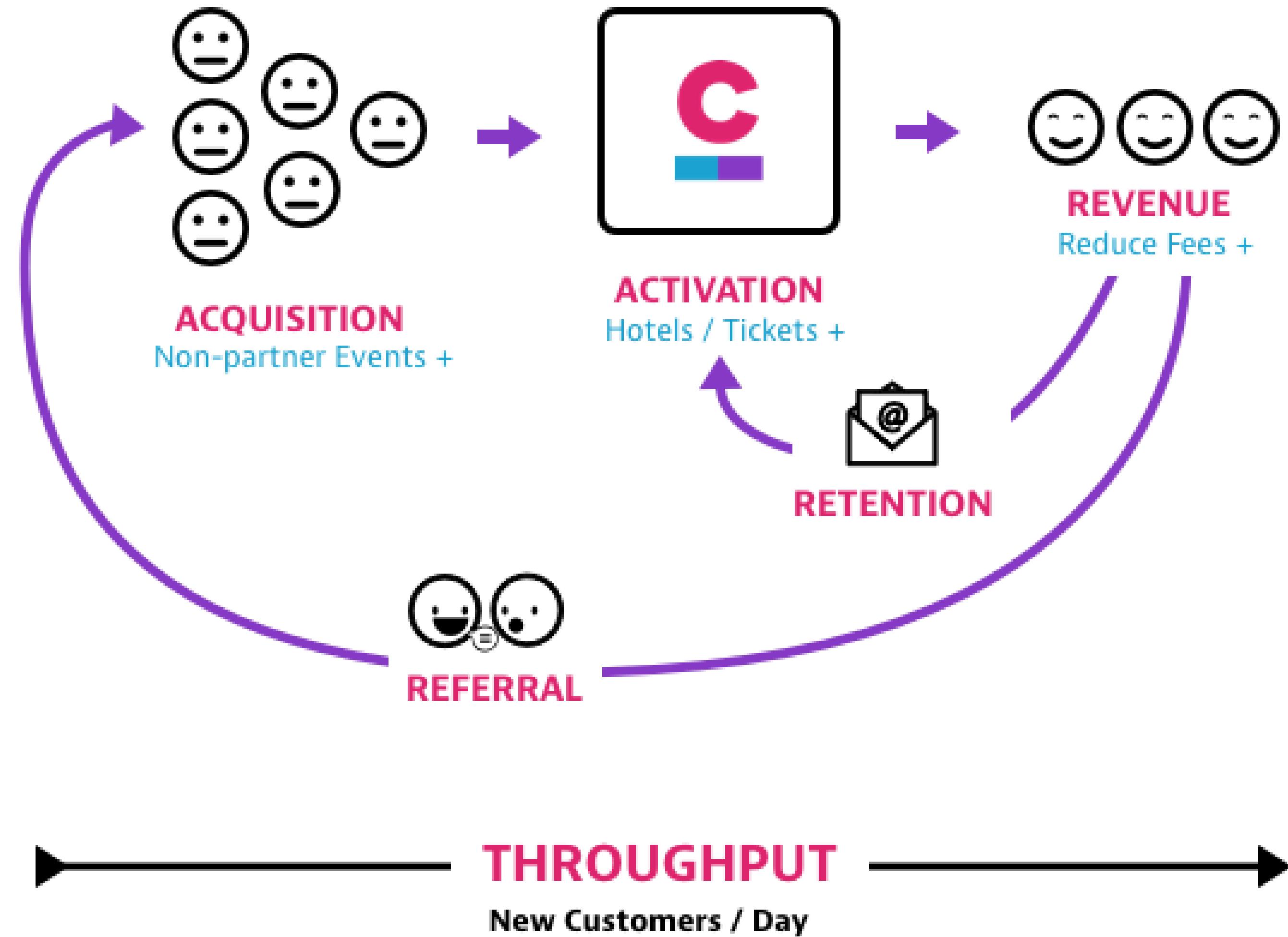
— Chief Product Officer



Co-creating a new vision for festival travel

Helping a festival ops company enter an adjacent market online

Curadora Customer Factory



Patterns from User Research

“ Finding friends to go with me can be stressful and time consuming

tag: first.time.festiv

“ I have to act quickly or tickets and nearby lodgings will sell out

tag: planner

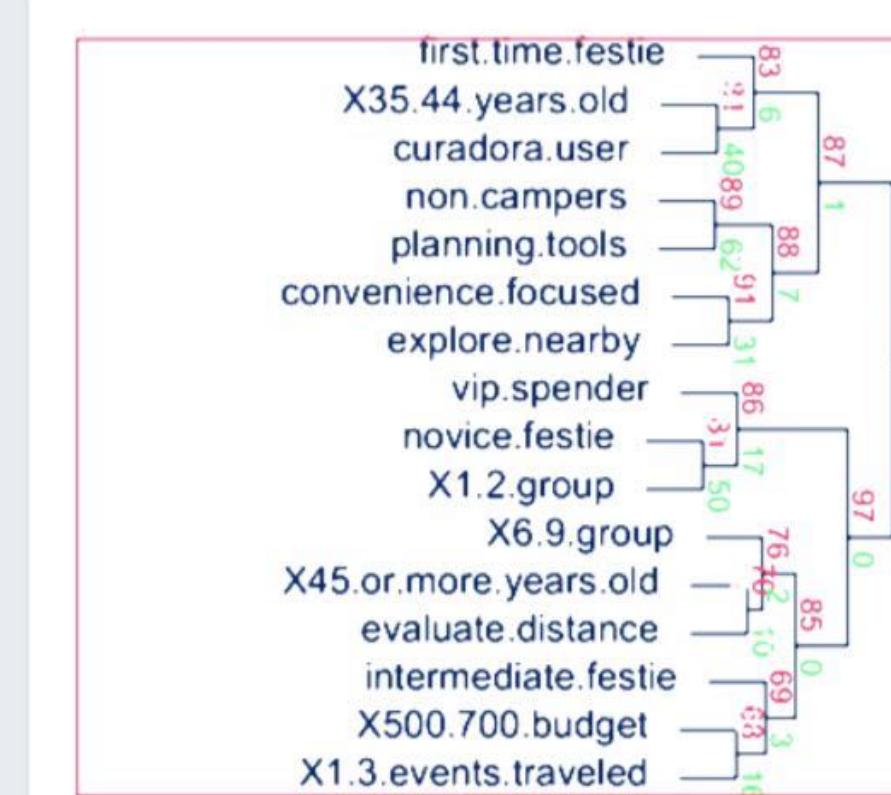
“ I keep in touch with my core group using a group chat to coordinate

tag: core.group

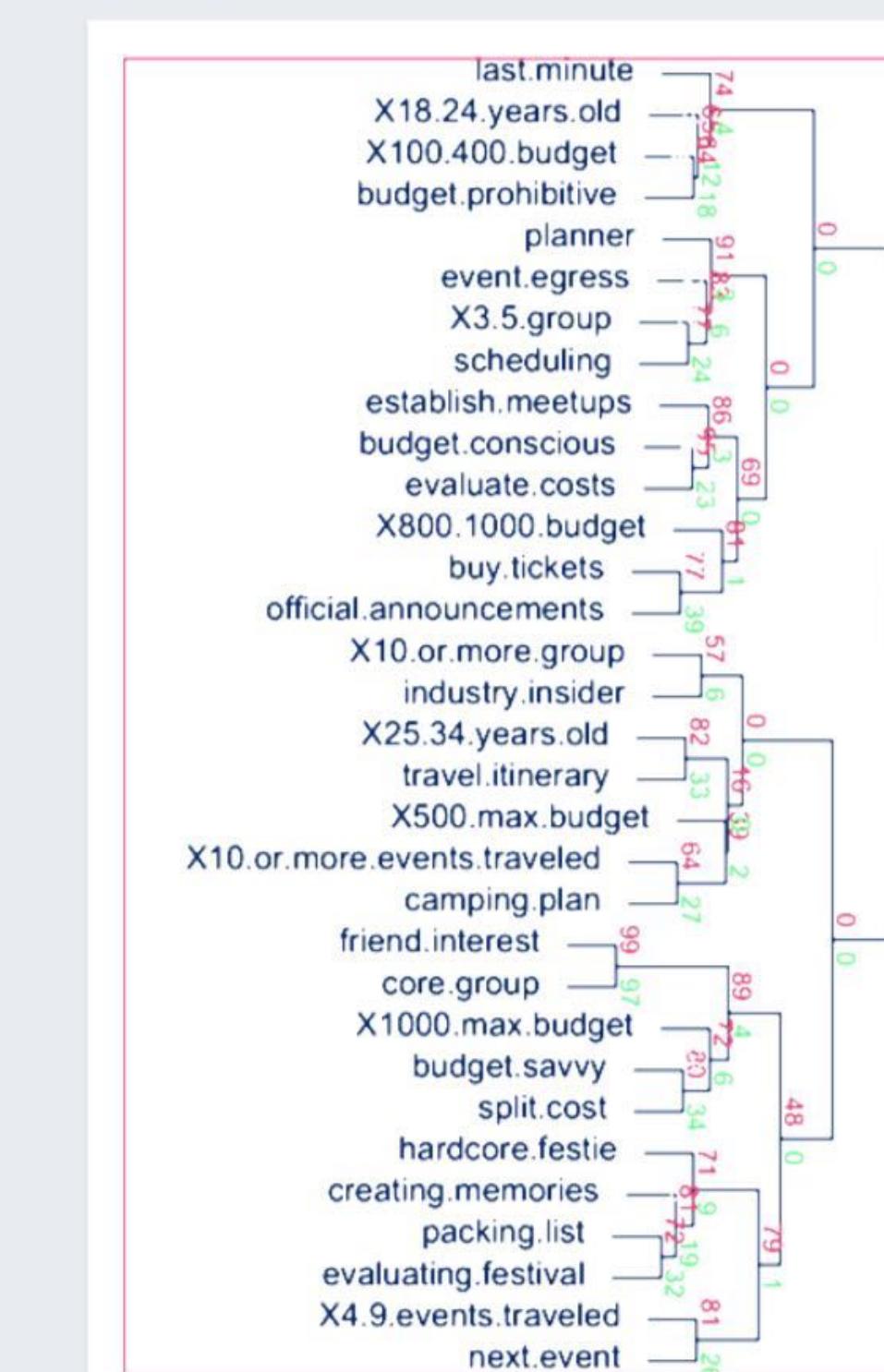
" When we purchase as a group it usually lowers the overall cost of the trip.

tag: split.cost

tag cluster:



tag cluster:



Personas

Festie persona
Non-camper persona
:::
Persona card
Insight card
+ Add another card

Discovery

I'll hear about an event I might be into through an official channel on social media, a website, or even the radio. If I miss an announcement, there's a chance one of my friends have already seen it and will tell me about it.

+ Add another card

Evaluation

I evaluate the festival vibe so I can put my time and energy into something that I think I'll enjoy. If the vibe is right, I can then reach out to people I know who would also be up for it.

I have to check if I'm free before I can decide if I can go to an event. I have to spend time figuring out who else can go since I wouldn't want to go alone. I really enjoy looking forward to a trip with my friends a few months in advance.

I prefer to go with a group because it makes the trip more fun and affordable. However, it can be stressful and time consuming to find the right friends to go with.

I feel an uneasiness when I can't anticipate all costs and don't know if I can stay within my estimated budget. At times I will be sacrificing my comfort and convenience in order to align with what my friends are willing to spend.

I check to see if the event is within driving distance because that tells me the cost of transportation. If I can drive there I can bring more people, carry my gear, and make a road trip out of it.

+ Add another card

Planning

The first thing I do is purchase tickets for the event in order to secure my spot and start the planning process with my group.

I plan things because If I don't no one will. It's a lot of work but in return I get to define the experience, lower cost, and make it easier to get my friends to go. When all the planing is done, we all have something great to look forward to.

I'll choose not to camp because it can be tiring and I'd rather stay clean, comfortable, and avoid sleeping in terrible weather conditions.

I use several online tools to help me find the closest lodging options, and the best deals.

I keep in touch with my core group using a group chat to coordinate all aspects of the trip, get ideas from the group and keep everyone in the loop. We do everything from researching the best options to figuring out the driving route and discussing who we want to see at the event.

I create a running packing list to prevent the stress of forgetting something and not being prepared for the conditions of the festival.

I'll choose to camp because I want to be close to the action and feel more connected with the community and the festival vibe. It's also nice not having to drive back to where I'm staying after each day

+ Add another card

Right before

We communicate and coordinate how we're getting to the event so that we can all get there smoothly and have a good time together.

When we purchase as a group it usually lowers the overall cost of the trip. Getting my friend's payment confirms that they're committed to going.

+ Add another card

During the event

I like to establish meetup spots so I can find my friends at events even if we split up.

+ Add another card

Right after

I make lasting connections at festivals. We created so many great memories together and we love to retell our stories.

When I have to deal with packing up all my things, leaving the event, and making the journey back home, it's tiresome and not enjoyable.

+ Add another card

Long after

Going to a music festival is an escape from reality to a bigger community and culture that I love. I'm drawn to do it again and again.

+ Add another card



The image shows a dense crowd of people at an outdoor concert or festival. In the top left corner, there is a logo consisting of a large pink letter 'C' above two horizontal bars, one blue and one purple. In the top right corner, there is a white circular icon with a stylized 'e' symbol next to the text "My Reservations". The main text "Curadura is the official hotel partner for" is positioned above the event name "HOUSTON OPEN AIR" in large, bold, white letters. The word "OPEN AIR" is flanked by two horizontal lines and a small graphic of a person jumping.

 [HIDE EVENT DETAILS](#)

Event Dates

SEP 24 - SEP 25

Venue

NRG PARK - HOUSTON, TX



Sep 24 - Sep 26 ✓

 More Filters

 My Reservations

Curadora is the official hotel partner for

HOUSTON OPEN AIR

[▼ SHOW EVENT DETAILS](#)

Check In & Check Out

Apr 14 - Apr 17

Price (USD)

\$0 Any

Min. Star Rating

★★★★★

Rooms

1 Room

More Filters

Sort: [Closest to Event](#)

1 - 24 (of 323) hotels near **NRG Park**

[GRID](#) [MAP](#)

 <p>8080 Main - Houston Medical Center</p> <p>7.6 guest rating</p> <p>▲ VIEW DISTANCE FROM EVENT</p>	 <p>Econo Lodge Medical Center</p> <p>8 guest rating</p> <p>▲ VIEW DISTANCE FROM EVENT</p>	 <p>BEST WESTERN Plaza Hotel & Suites At Medical Center</p> <p>7.6 guest rating</p> <p>▲ VIEW DISTANCE FROM EVENT</p>
 <p>Holiday Inn Houston S - Nrg Area - Med Ctr</p> <p>7.9 guest rating</p> <p>▲ VIEW DISTANCE FROM EVENT</p>	 <p>Crowne Plaza Hotel Houston Near Reliant/Medical Center</p> <p>6.4 guest rating</p> <p>▲ VIEW DISTANCE FROM EVENT</p>	 <p>Extended Stay America - Houston - Med. Ctr - NRG Park - Kirby</p> <p>7.4 guest rating</p> <p>▲ VIEW DISTANCE FROM EVENT</p>
 <p>Quality Inn & Suites</p> <p>FROM \$140 PER NIGHT</p>	 <p>Quality Inn & Suites</p> <p>FROM \$110 PER NIGHT</p>	 <p>Quality Inn & Suites</p> <p>FROM \$139 PER NIGHT</p>

“He is one of the easiest people to both talk to and work with, and often goes above and beyond to ensure the design process is successful while helping the company define, re-define, and achieve its biggest goals. He is extremely knowledgeable about his field, trumped only by his passion to learn and apply new methodologies when they are applicable.”

— Director of Product Management

“Miguel's curiosity to learn and expand his knowledge is invigorating. His desire to connect on a deeper level with users truly shows just how much companies need someone like him who think outside of the box. His enthusiasm and high energy got everyone so excited to come to work everyday to help to further achieve our team goals.”

— Project Coordinator, Digital Initiatives