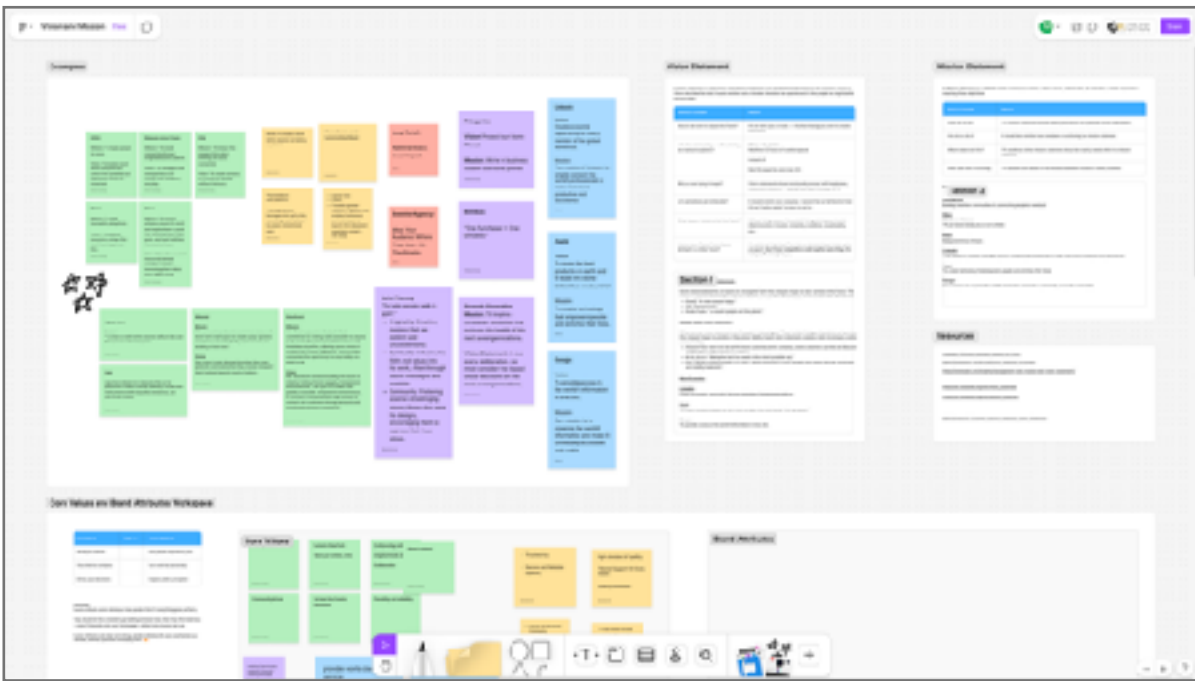


Parasol Projects

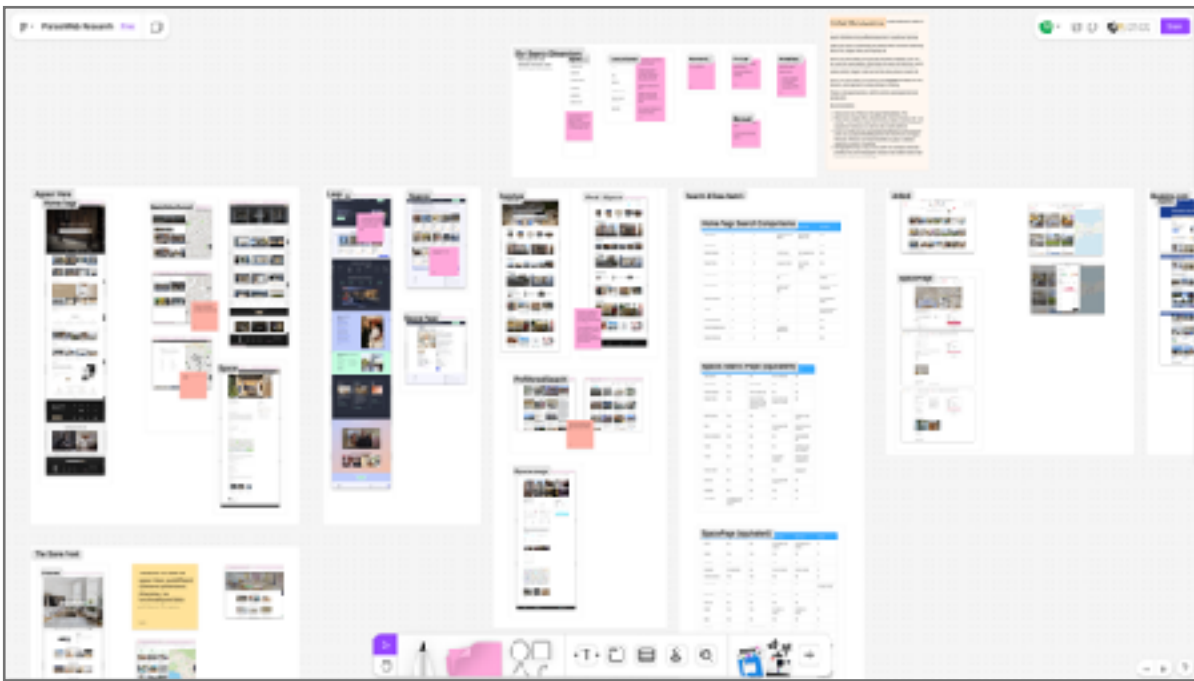
Parasol Projects offers short term rental, high value retail locations in New York City, Miami, Los Angeles, and Chicago.

My work with this client has touched almost every corner of the business. They lacked a clear vision, had no business plan with measurable KPIs, and no way to measure value. Working with the leadership team, we developed a vision and mission statement, a clear business plan for growth, measurable KPIs for features and supporting creative.

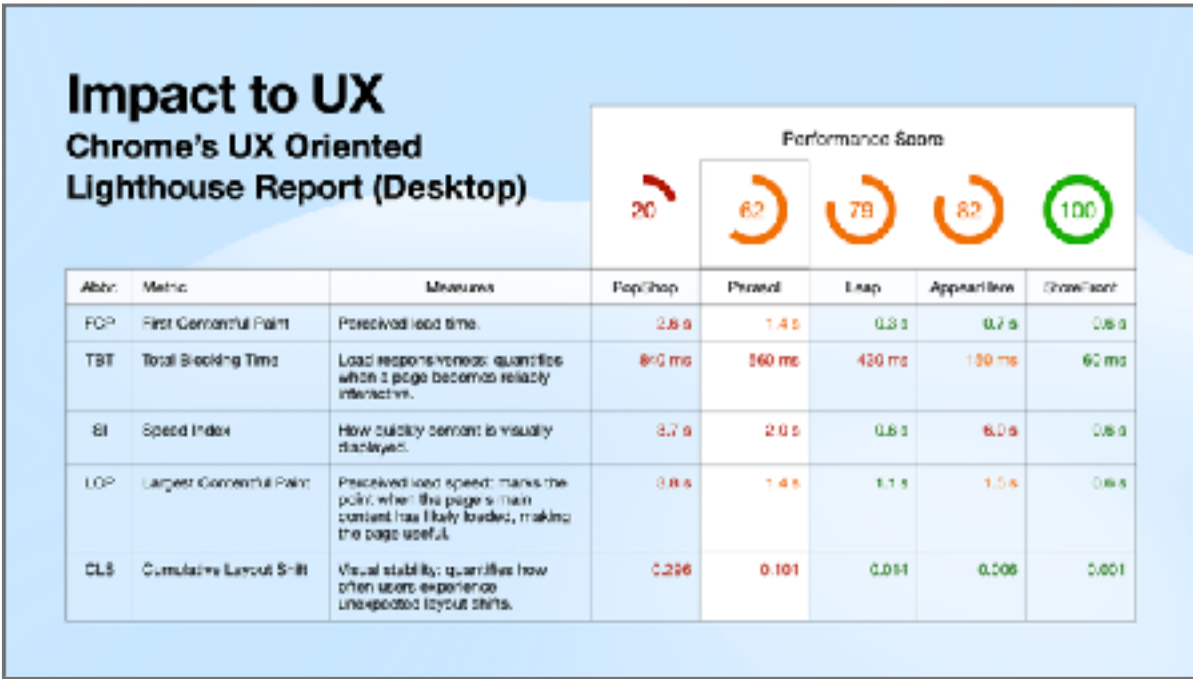
The website is currently being designed and developed using generative AI.



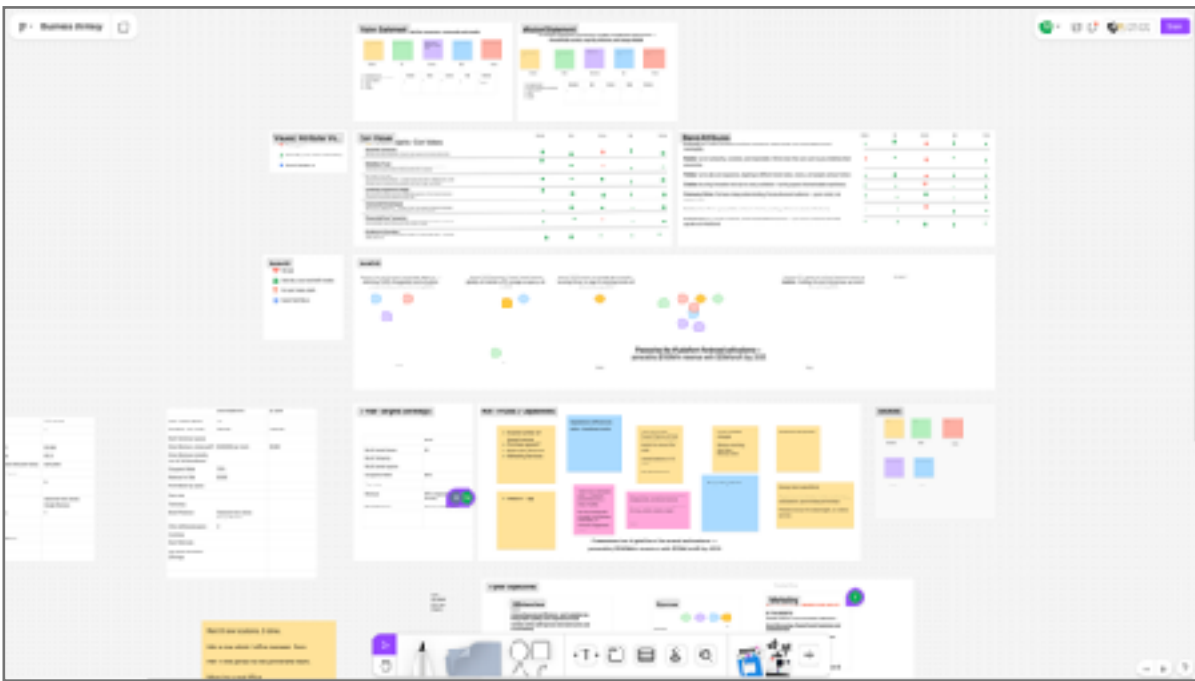
Research & Facilitation: Vision & Mission Statement



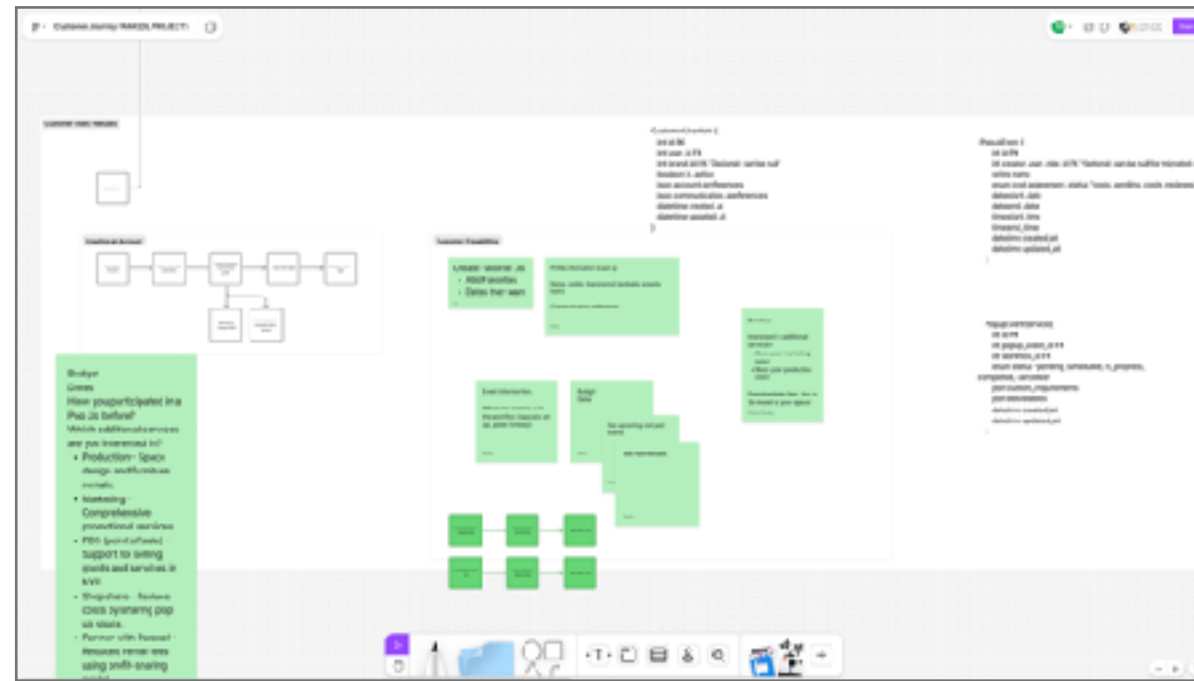
Analysis: UX, Design, Capabilities across competitors



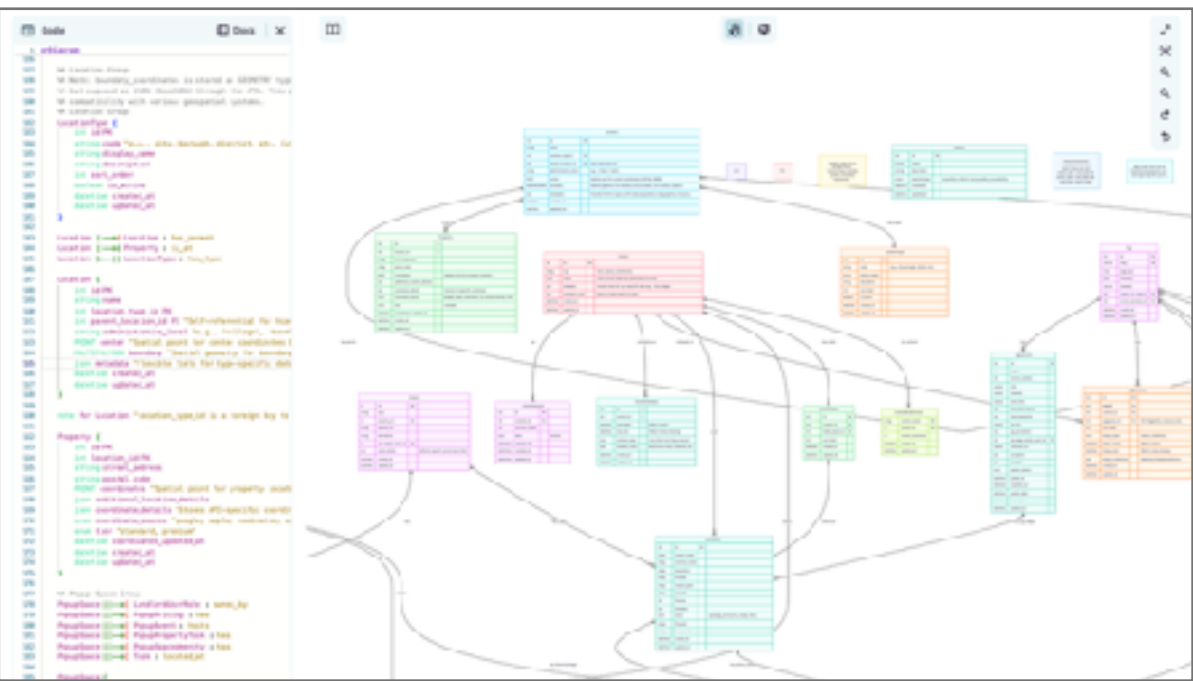
Analysis: UX perception across competitors



Facilitation: Business Strategy to define KPIs



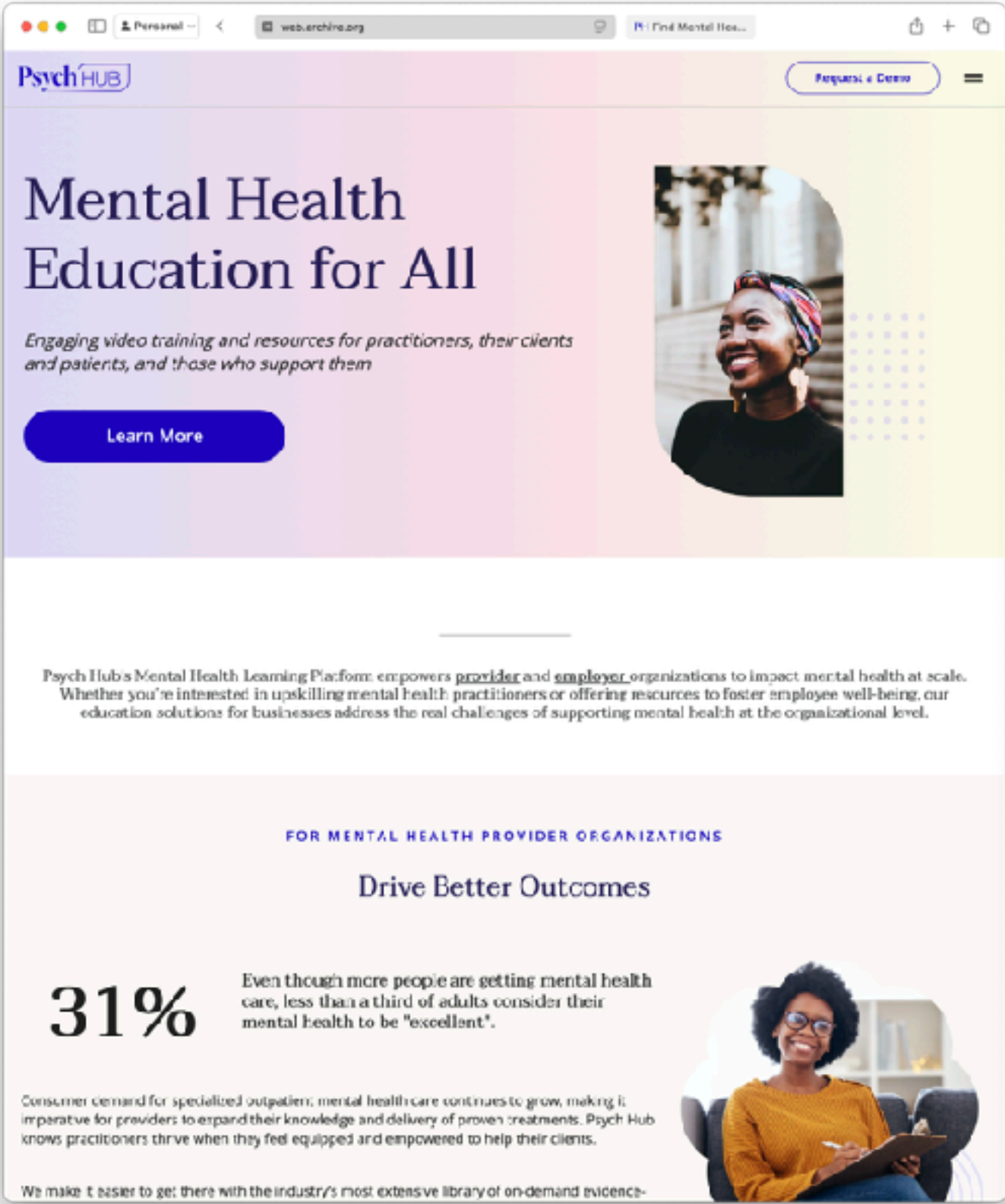
Research: User Flows & Capabilities to align to KPIs



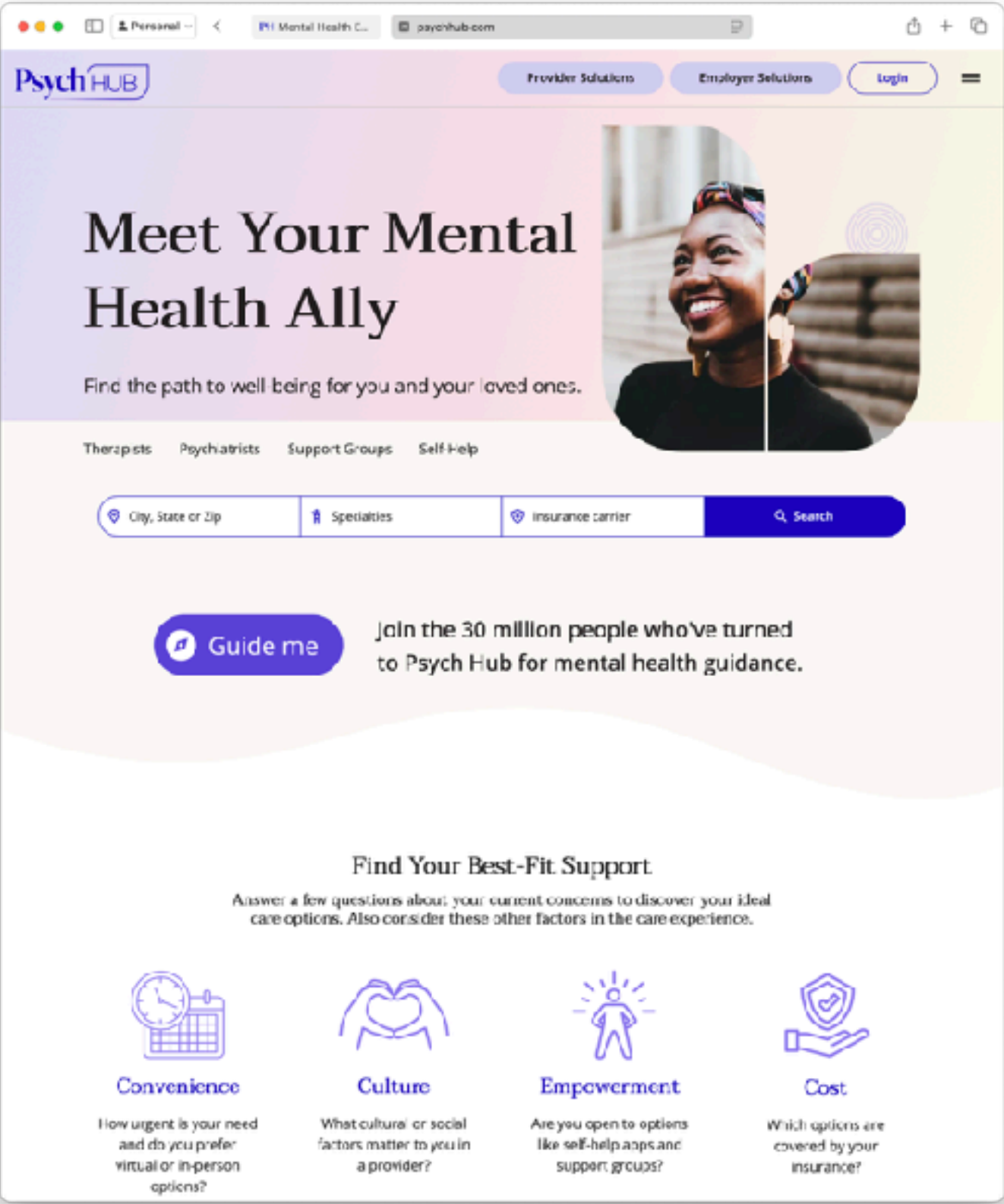
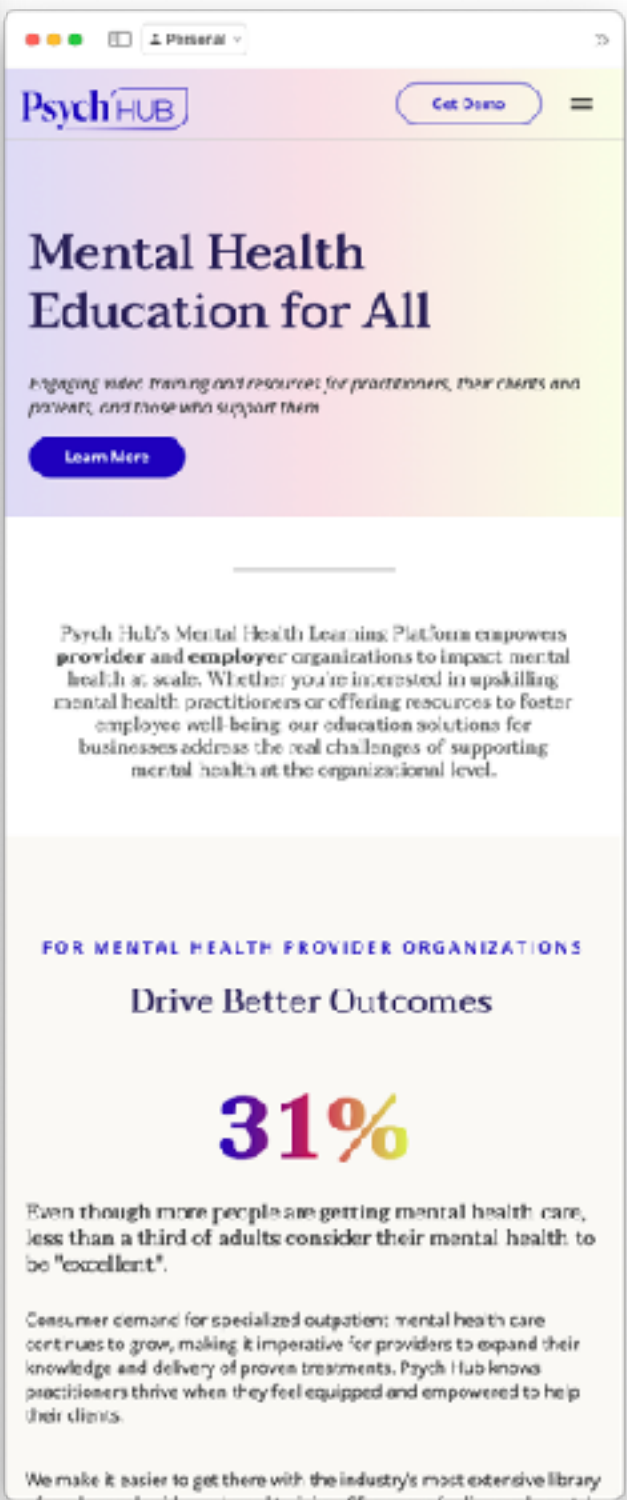
Platform Design: Future Capabilities aligned to KPIs

Psych Hub

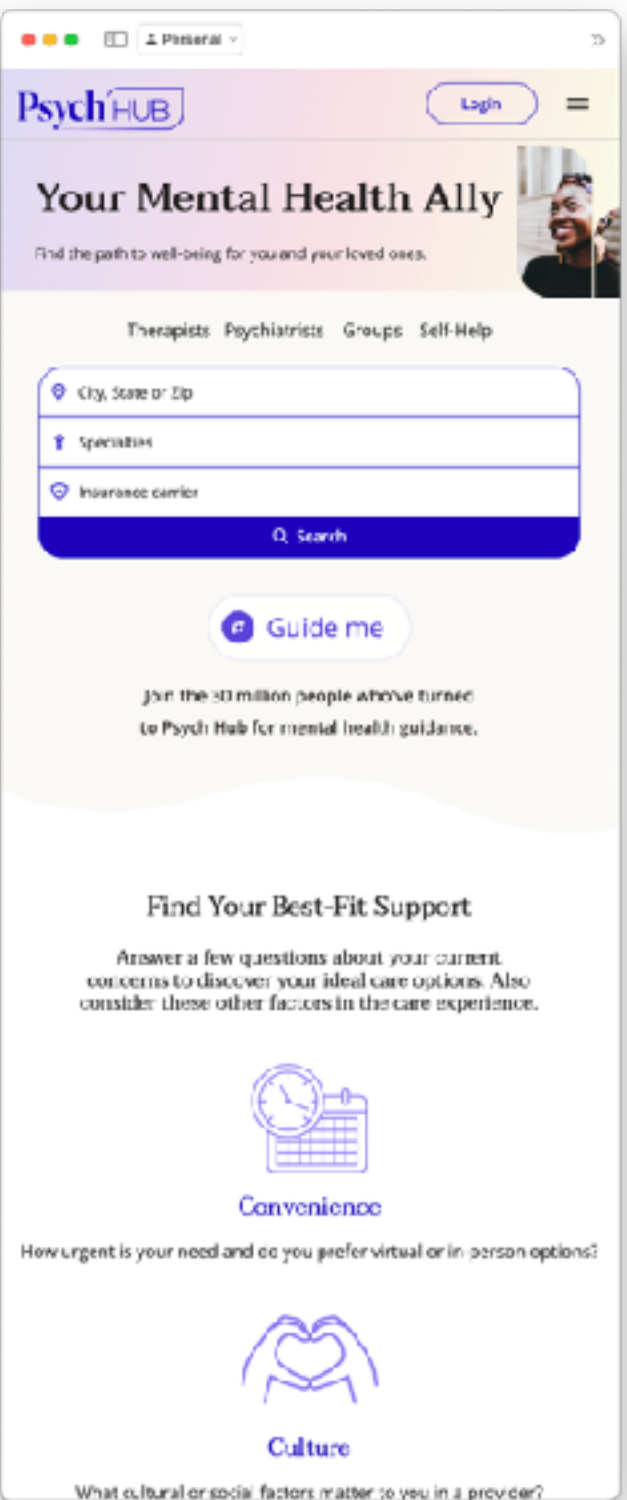
Psych Hub had existing Figma designs, but not brand standards. I was able to bridge that gap and consistently apply design across the site improving legibility, personality, and messaging on both desktop and mobile layouts.



Original from web archive on Oct '24



Redesign as of Dec '24



eMoney Advisor

For over 20 years, eMoney Advisor has delivered industry leading software for financial planners. As an engineering driven company, they focused heavily on delivering valuable features to customers.


A revolving door of designers brought their own point of view to the product resulting in confusing interfaces, duplicated efforts, and a complete lack of UXUI consistency.

As the Director of Design Systems, I was tasked with bringing UX consistency to our products through composable, scalable artifacts for teams to design and deliver with.

My first week saw the CEO and Head of Product leave, placing all hiring on freeze. Without a team, I worked as an individual contributor conducting research, facilitating workshops and designing, developing, and testing the design system.

TODAY'S PROCESS
TODAY'S PROBLEMS

No single source of truth.



Brand styles out-of-sync with products (different colors, fonts, icons, name of widgets)

Static documentation stored across multiple locations

Multiple disconnected UI libraries (Figma, Adobe XD, Sketch, etc.)

7 sources of different documentation

Limited to no usage guidance

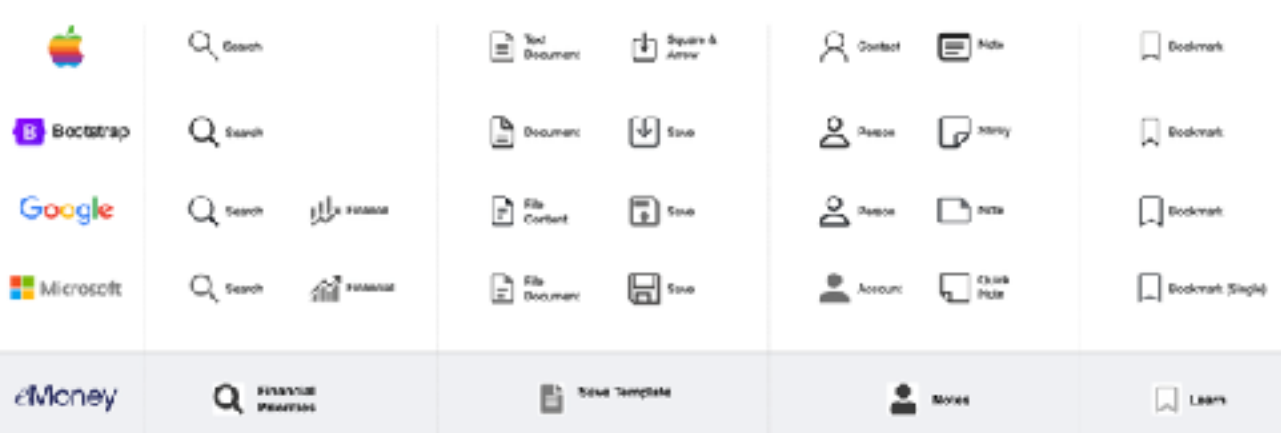
Design tools and file management varies by product and department, impairing communication and reuse across teams.

Figma, Xd, Sketch, inVision, Confluence, OneDrive, box

eMoney

TODAY'S PROCESS
TODAY'S PROBLEMS

Standard icons. Non-standard use.

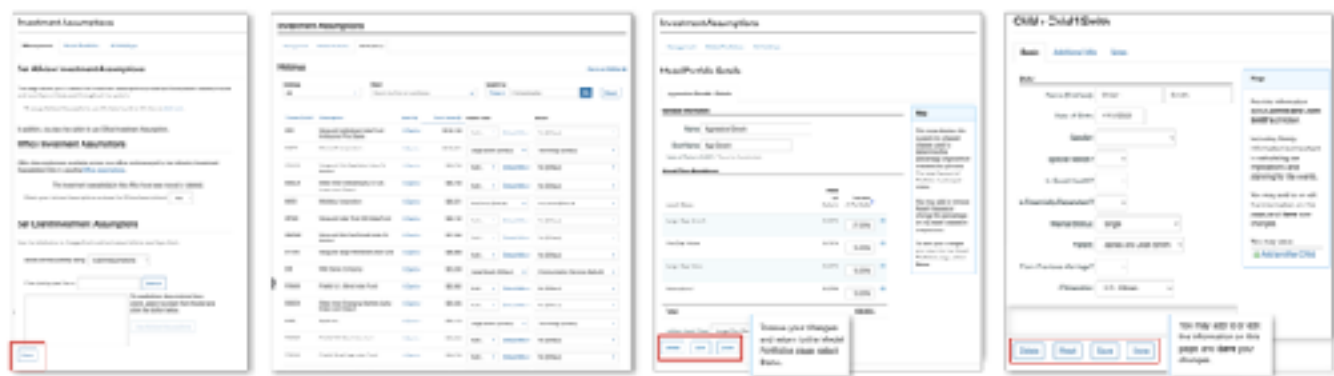


Our icons don't logically reflect what users expect.

eMoney

TODAY'S PROCESS
TODAY'S PROBLEMS

Save, Done, or None?




37+ variations of "save" behavior, button labels, and placement.

eMoney

TODAY'S PROCESS
TODAY'S PROBLEMS

Efficiency: Redundant UIs for the same tasks.

Example: Add, Remove, Reorder Items in a List



The Cost of Just One Design (no money, just time, and space to remaining team members to calculate a rough cost of the new solution.)

Project Start - End	1/20/20 - 4/5/20
Team capacity per person	280 hours
Cost per Person per Hour	\$100

Role Allocation Cost

Screen Writer	0.5	\$50,000
Developer	2.0	\$200,000
Designer	0.5	\$50,000
QA	0.5	\$50,000
Product Owner	0.5	\$50,000

\$130,020 over 10 Weeks

We found 9 unique UIs to support this same task.

eMoney

Insights from Jira, interviews with team members.

TODAY'S PROCESS
TODAY'S PROBLEMS

Support: More training. More calls.

Assisting Customers with Difficult to Use Software and Work Arounds

68,480 hours

Customer Service Bandwidth	36%
Client Services Bandwidth	57%

Cost (annualized total comp ratio + overhead)

\$3.66M

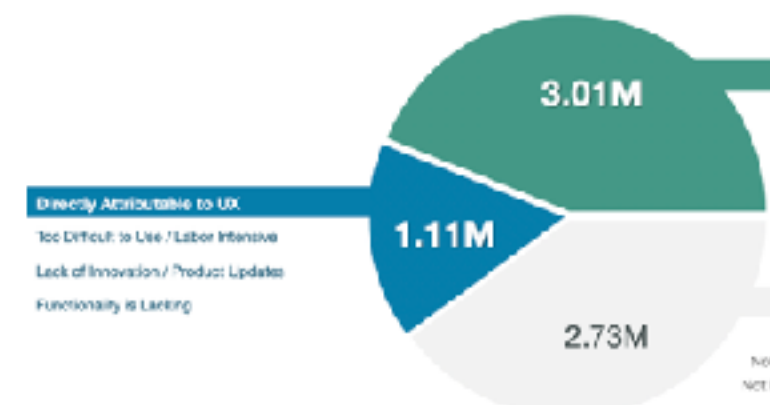
eMoney

Insights from interviews, surveys with customer service reps and coaches.

TODAY'S PROCESS
TODAY'S PROBLEMS

Retention: More churn.

ARR for Cancelled Accounts by Top Ranked Frustration Reason
January 2020 - June 2022



3.01M May be Mitigated by Better UX

- Difficult: engaging Clients
- Trouble with Connections
- Insufficient Greeting
- Not Using Platform
- No Help/Support
- Not Clear

1.11M Directly Attributable to UX

- Too Difficult to Use / Labor Intensive
- Lack of Innovation / Product Updates
- Functionality is Lacking

2.73M Out of Our Control

- Left Office
- Not offering financial planning as a service
- Not offering software endorsed by Fintech
- Other

These are retention handled efforts only and do not reflect the total cancellation churn

*Sources: Lower Retention Details & Outcomes Shared From Jan '20 - June '22, Top Ranked Frustration Reasons for Cancelled Accounts, June Yearbook Additional Data from: Heather Fisher & Bill [redacted]

eMoney

Insights from Voice of the Customer, internal ticketing boards

Corporate ID and Logo Samples

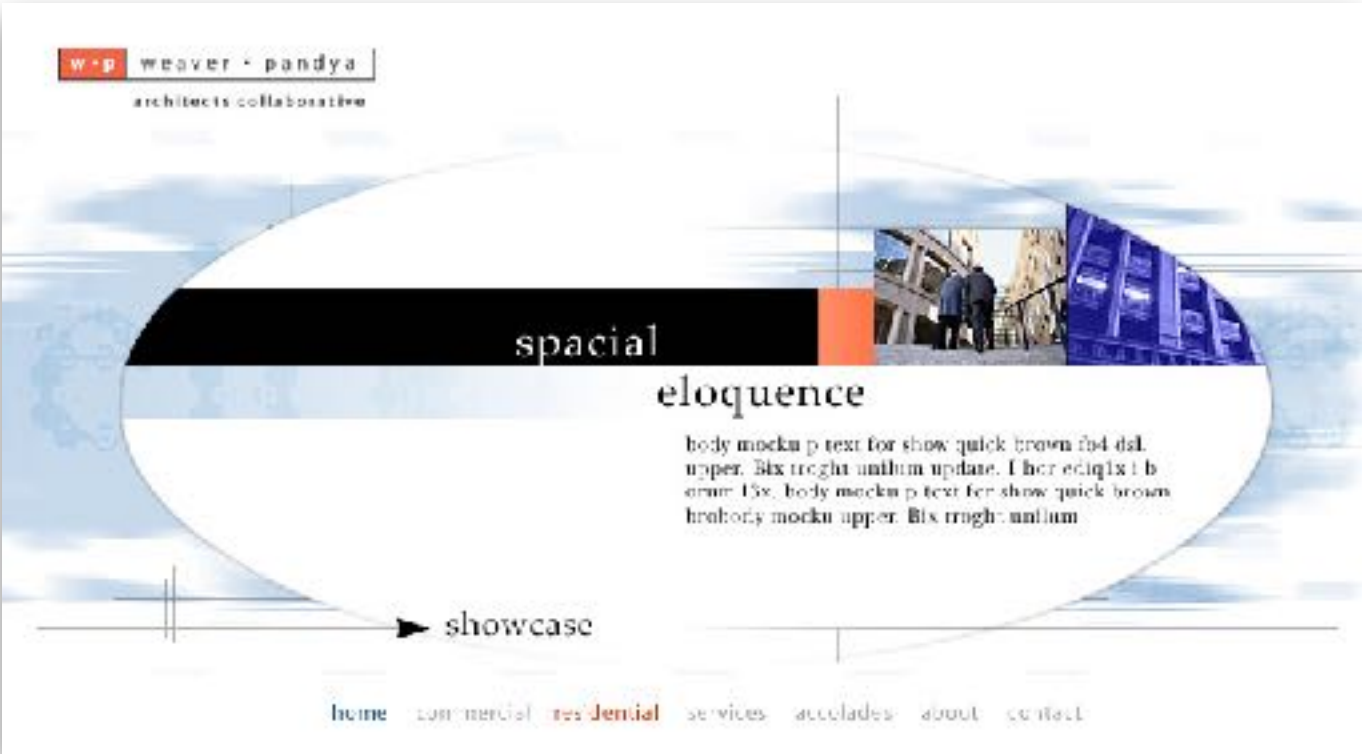


Website Samples

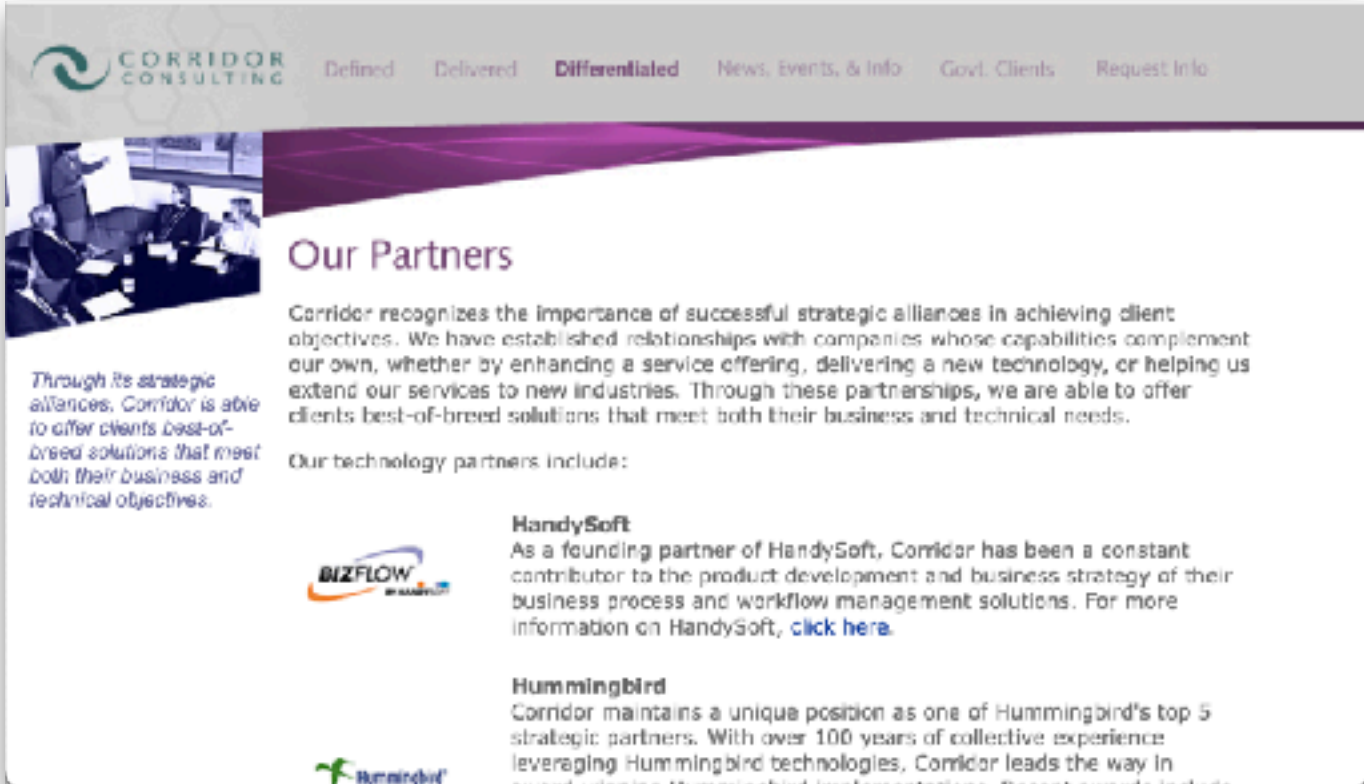
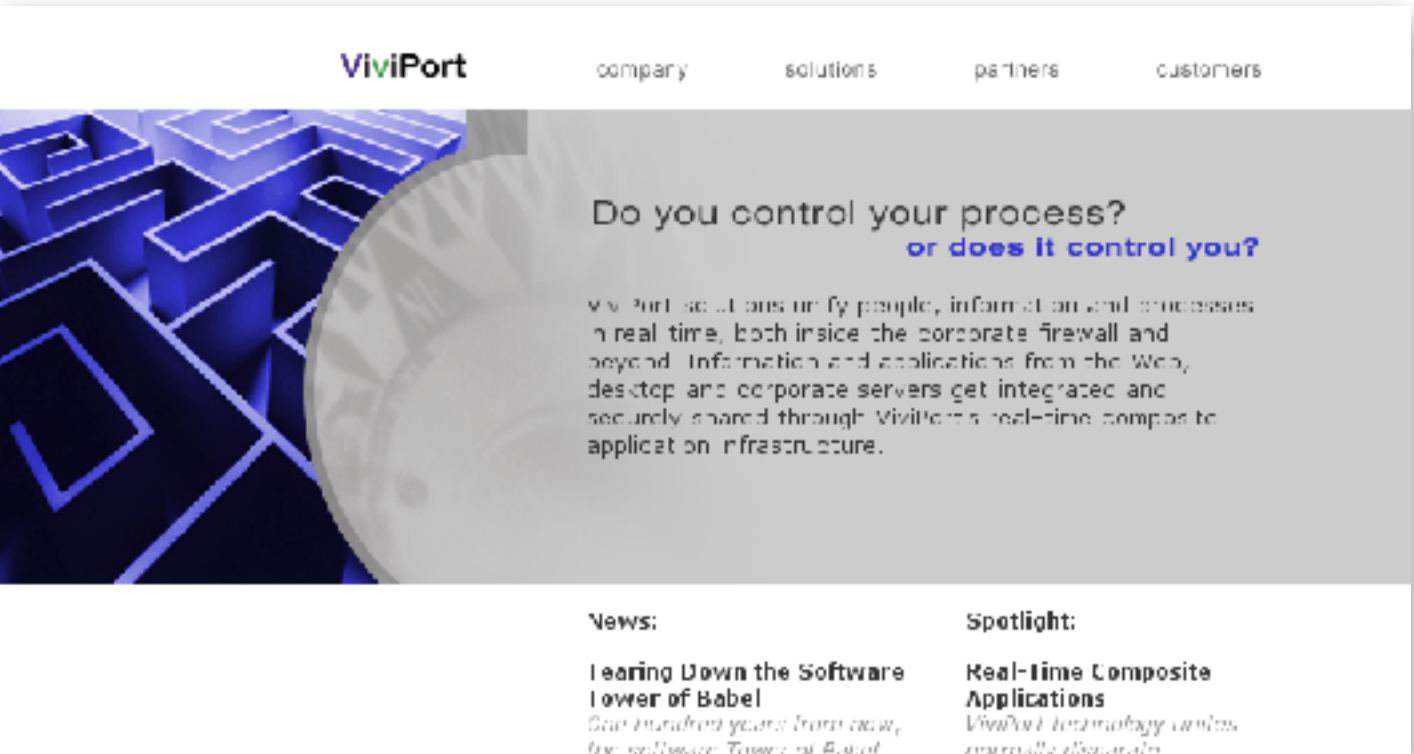
Corridor Consulting



Weaver & Pandya Architects

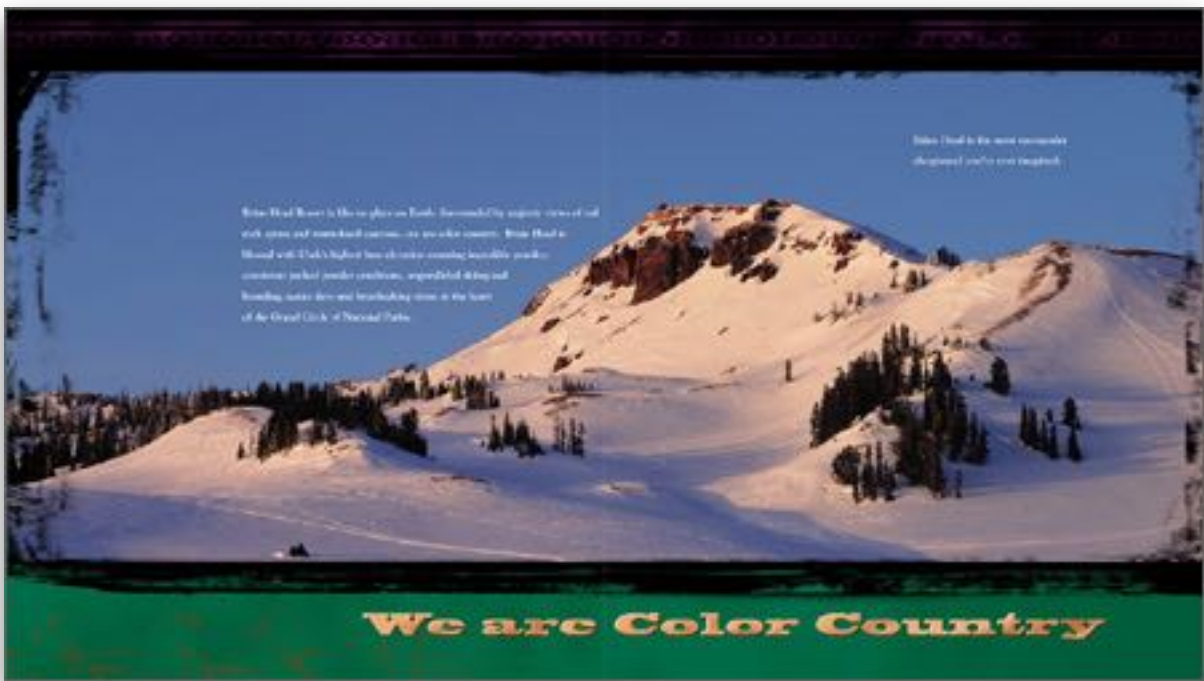
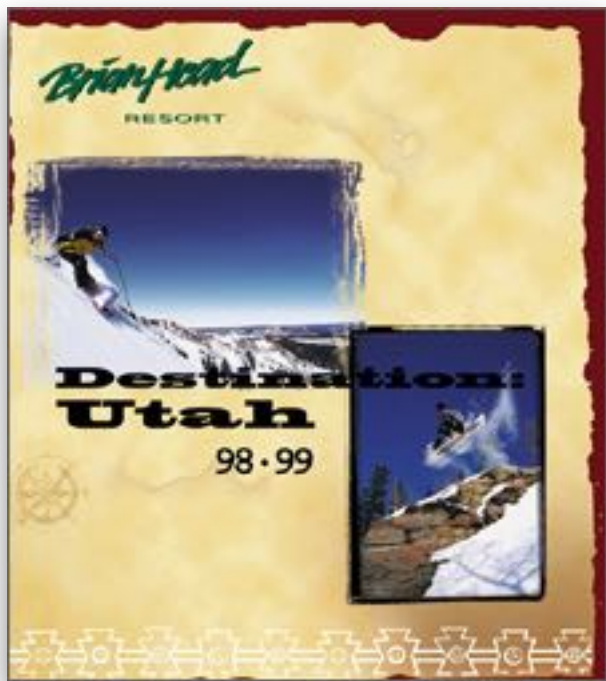


Viviport



Brochure and CD insert Samples

Brian Head Resort



Okemo Resort



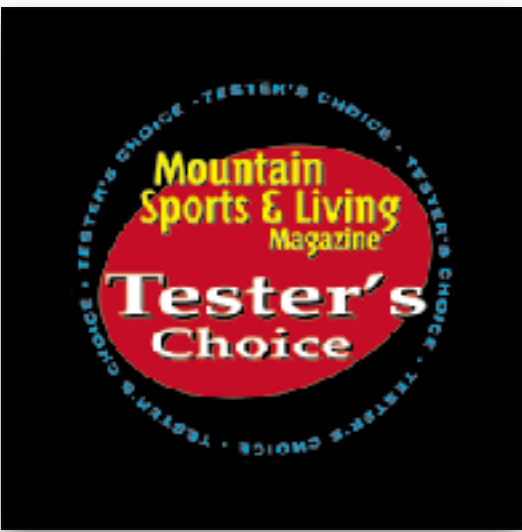
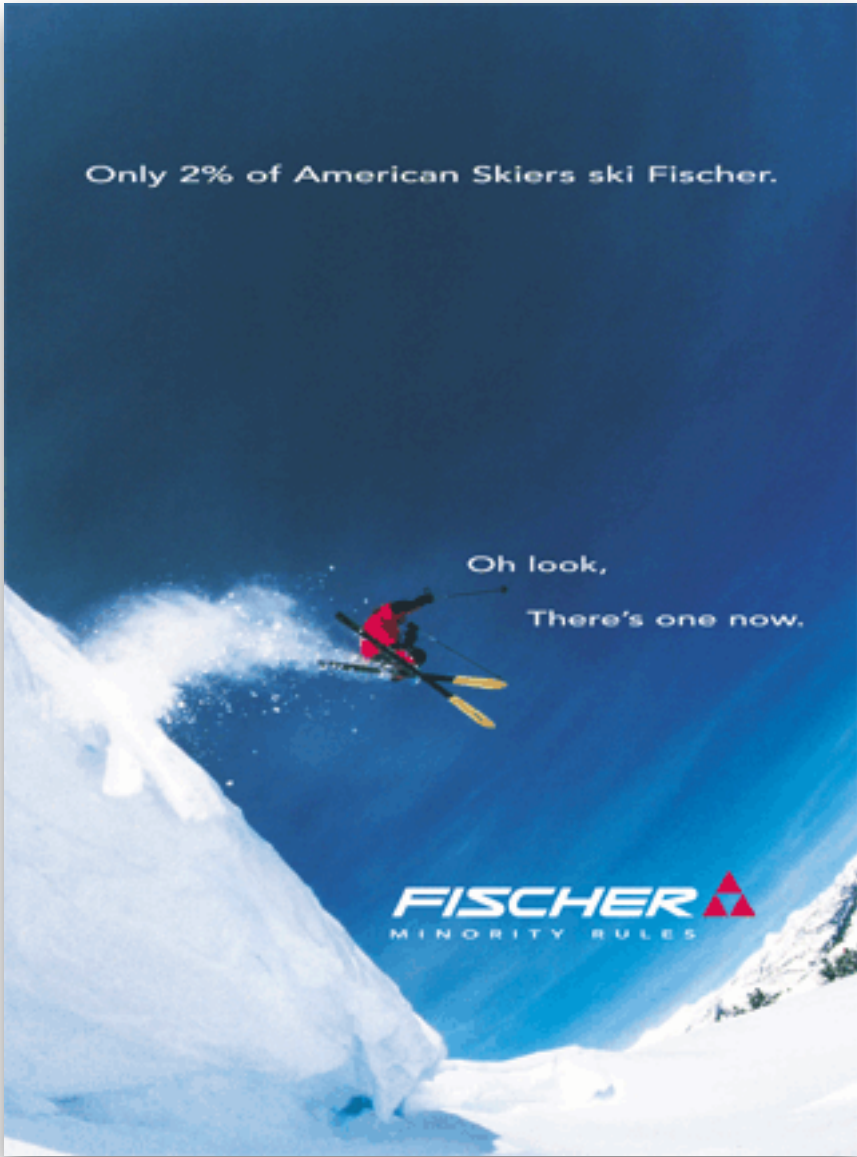
Fischer Skis



Mountain High Resort

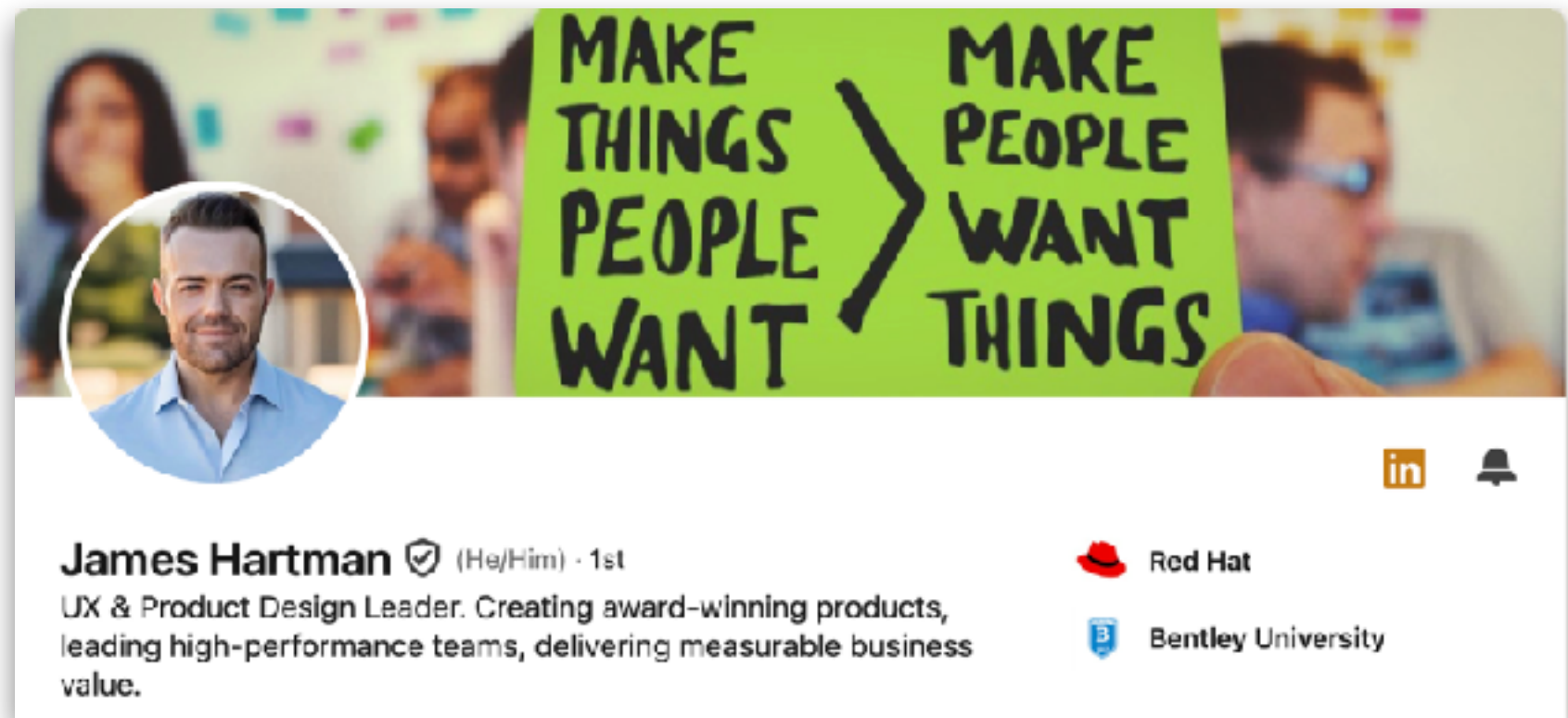


Print Ads, Stickers, and Table Tent Samples

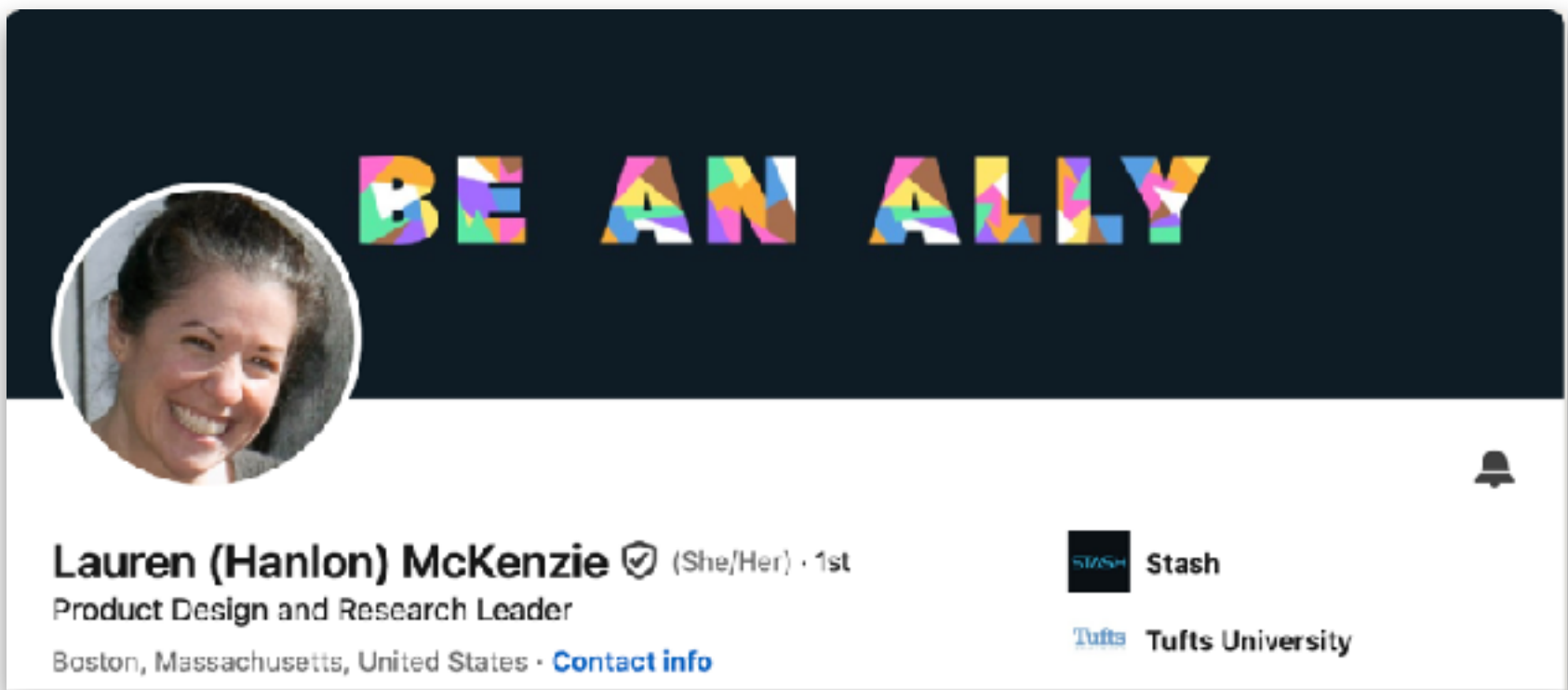


References

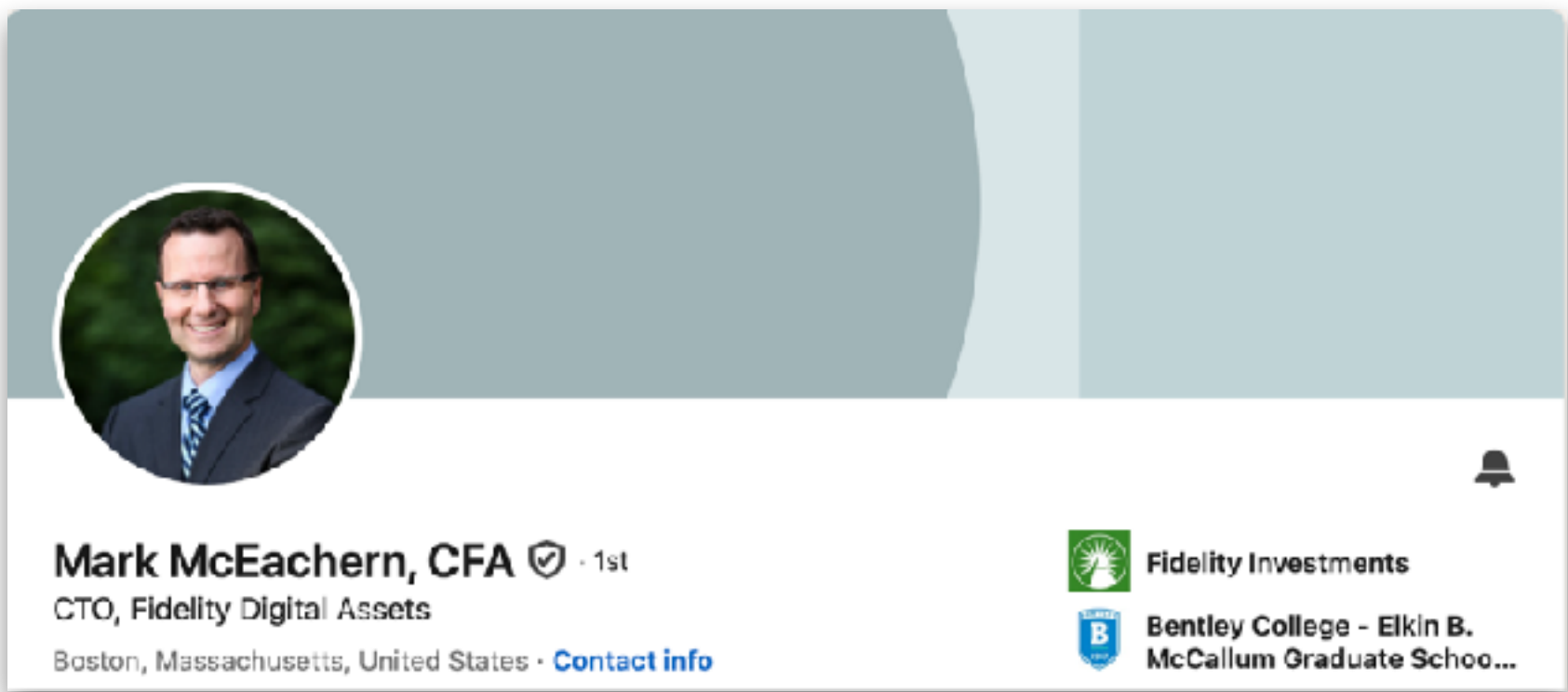
You can contact them through linkedIn, or I can supply phones and emails.



<https://www.linkedin.com/in/jamesrhartman/>



<https://www.linkedin.com/in/laurenhanlon/>



<https://www.linkedin.com/in/mmceachern/>