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CASE STUDIES

- **SPOTIFY** | Concept and usability study
- **SOTHEBY'S HOME** | Discovery and evaluative research
- **N26** | New market research and value proposition testing for U.S. launch
- **MOTIVATE INTERNATIONAL** | R&D for operational tools
- **COX COMMUNICATIONS** | Large scale study to understand customer journey
- **CITI BANK** | New feature testing via customer co-creation panels

Spotify

MUSIC | SENIOR USER RESEARCHER (FREELANCE)

Spotify is a freemium digital music service used throughout the world. They hired me to lead concept and usability testing for new features they were exploring for their Free product.

I worked closely with two product designers, a product manager, and data scientist. I also worked with other researchers and research ops for peer review.

OBJECTIVES

- Test the usability of each new feature concept
- Gauge user sentiment towards each concept
- Understand what value, if any, users perceive in each of the features

METHODOLOGY AND PROCESS

- Conducted stakeholder interviews and secondary research for business context and to refine objectives
- Worked with data science to pull customer list, emailed screener survey and phone screened participants to determine match and schedule
- Led in-person user interviews in NYC to test new feature ideas
- Led download and synthesis process
- Reported research findings and debrief conversation with cross-disciplinary stakeholders to answer questions and discuss next steps

OUTCOME

We learned that a set of the concepts we tested were clear, appealing, had the potential to serve existing user needs and were worthwhile to pursue. We also learned that some features were not worth investing in, and why.

We put together a plan to roll out a simplified version of the desirable concepts to the live product, to test usage at scale.

Methodology, participant recruit, sample of insights, summary of each concept and an overall summary of the study and recommendations.

8 in-lab interviews

We conducted in-lab interviews to test & compare multiple Like and Save concepts. Each concept had 3-5 of the participant's first impression.

Order	P1	P2	P3	P4	P5	P6	P7	P8
Intro								
Background								
1st	Proto A	Proto B	Proto B					
2nd	Proto B	Proto A	Proto A					
Debrief (comparison of prototypes / idea feature)								
Closing								

Participants

All participants were active Spotify Free users with a range of usage of Like, Library and Home, which are relevant to the secondary intents and save locations we explored in the prototypes.

We had 2 Android and 5 iOS participants with a mix of demographics.

Concept Specific Summary

Participants saw value in a feature that would allow them to skip songs later without interrupting their current listening experience.

Participants liked the idea of being able to skip songs without having to stop and start the song again. Some participants mentioned that it would be useful for users who have trouble with their headphones or device.

Summary and Recommendations

Some do this already – by default. So this feature could save them a step.

Participants liked the idea of being able to skip songs without having to stop and start the song again. Some participants mentioned that it would be useful for users who have trouble with their headphones or device.

Sotheby's Home

ECOMMERCE | SENIOR UX RESEARCH CONSULTANT

Sotheby's Home is a high-end art and furniture consignment marketplace that was created in 2018 through a startup acquisition and subsequent rebrand. Sales slowed significantly following the rebrand but the business had no insight into why. They hired me to help them figure out why, and what they could do about it.

I worked closely with a product manager, and an executive stakeholder group comprised of the CEO and leads across marketing, cx, engineering, design & sales.

OBJECTIVES

- Learn about the relevant existing behaviors, mindsets and needs of current customers
- Understand customer perception of Sotheby's Home, and how it compares to its competitors
- Understand how customers use Sotheby's Home
- Test new feature concepts
- Identify opportunities to improve the user experience and increase engagement and retention

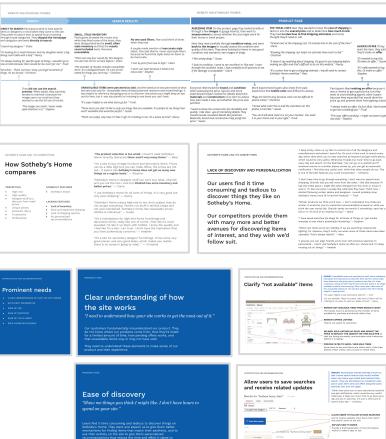
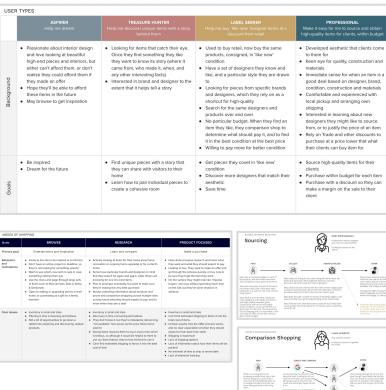
METHODOLOGY AND PROCESS

- Conducted stakeholder interviews and secondary research for business context and to refine objectives
- Worked with data science to pull customer list, emailed screener survey and scheduled interview participants
- Led remote in depth interviews to dive deep on relevant behavior, existing usage of Sotheby's Home and its competitors, and to test new feature ideas
- Led download and synthesis process
- Reported insights and recommendations to stakeholders

OUTCOME

We identified core user types, distinct modes of usage, prominent needs, and deterrents to usage that the business could address. We identified high impact opportunities to improve site usability, and longer term strategic opportunities to increase engagement, brand perception and sales.

Remote user interviews, user types, prominent shopping behaviors, usability themes presented as a user flow, perception of Sotheby's Home and how it compares to its competitors, and recommendations grouped by prominent user need.



N26

FINANCIAL SERVICES | SENIOR UX RESEARCH CONSULTANT

N26 is a mobile, branchless bank that started in Europe, and is expanding to new markets. They hired me to lead research to inform their U.S. launch, to identify target market and initial product offering.

I worked closely with their product design lead, and my key stakeholders were the International Head of Research, the U.S. CEO, and the U.S. product and marketing leads.

OBJECTIVES

- Develop a foundational knowledge of mindsets and methods around spending, money management in the U.S.
- Understand what people expect in a bank, and which features are premium
- Identify unmet needs that we might serve
- Test value propositions
- Identify target market for N26 in the U.S.

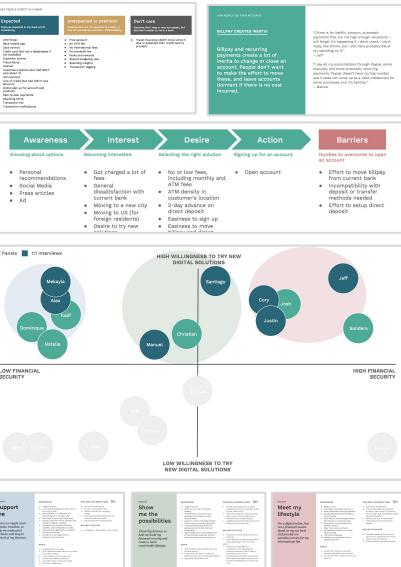
METHODOLOGY AND PROCESS

- Conducted stakeholder interviews and secondary research for business context and objectives
- Created survey to recruit participants from waitlist and social
- Led co-creation panels to gain a broad understanding of prospective customers, banking needs and appetite for key features
- Led primarily remote, in depth interviews to go deep and to test value propositions
- Led synthesis to identify target market, mindsets and the most compelling value propositions
- Held workshopping sessions with stakeholders to collaborate on turning insights into action

OUTCOME

We identified target markets and five strong value propositions for the U.S. market and launch messaging. Following this research, the team tested those value props quantitatively at scale to measure demand for each, to inform a final launch strategy.

Co-creation panel activities (guided discussion, card sort, small group feature design and debrief), remote in depth interviews, insights around banking expectations and behavior, behavioral mapping and user mindsets.



Motivate International

TRANSPORTATION | SENIOR RESEARCH AND UX CONSULTANT

Motivate was a transportation company that operated bike share programs across the U.S., and was acquired by Lyft in 2018. In order to maintain an operable fleet of bikes, their mechanics must make constant adjustments and repairs. They hired me to work with a team to research and develop operational tools for field and depot mechanics.

I worked closely with a product manager, a team of software developers and a broad range of stakeholders including the depot and field operations lead, the head of product, and the operations managers in all cities.

OBJECTIVES

- Understand context of use of existing tools; evaluate usability of and opportunities for improvement
- Identify additional unmet needs
- Iteratively test new designs, user flows and live prototypes

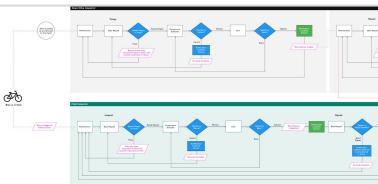
Ethnographic observation in depot, diagram of observed depot user flows, paper prototype testing of new tool design, usability testing the live build, usability testing the prototype, training mechanics on the new tools as part of roll out, and a diagram of the field to depot UX flows.

METHODOLOGY AND PROCESS

- Conducted design ethnography with mechanics in depot and in field to understand their work flows
- Conducted baseline usability testing evaluate usage of existing tools, issues, motivations and sentiment
- Developed strong rapport with mechanics
- Created and tested paper prototypes of redesigned UI and new features, with mechanics, for feedback and iteration
- Tested live HTML prototypes with mechanics
- Conducted additional research and testing as new needs were identified

OUTCOMES

By working closely with mechanics, we were able to quickly identify, test and release impactful changes and new features. By inviting mechanics to share their expertise and opinions, we were able to create solutions that they were invested in, and excited to use. We also uncovered additional factors that majorly contributed to usage, including depot layout and mechanic satisfaction. We looped in relevant teams and developed a service design perspective on operations.



Cox Communications

TELECOMMUNICATIONS | RESEARCH LEAD

Retail observation, in home observation of self-install and prototype testing, insights (including high impact issues, error report, self-install satisfaction scoring, System Usability Ratings, customer types), recommendations and ideation prompts for post-research workshop.

Cox is one of the largest internet service providers in the U.S. New internet customers can have their internet set up by a technician, or they can do it themselves using a self-install kit. Cox wanted to understand the complete end-to-end experience of that process, and to identify opportunities to maximize usability, and increase success rates and satisfaction.

I led a team of four researchers, including myself, and co-led the client relationship in collaboration with a project manager. We worked with a team of other consultants including a strategy lead, industrial designer, and product designer. Our Cox stakeholder group was made up of the heads of all relevant departments. Our primary stakeholders were the head of self-install product, and the head of user experience.

OBJECTIVES

- Understand the end to end self-install experience
- Identify major points of failure and opportunities for near-term and future improvements
- Test a prototype of hypothesized solutions

METHODOLOGY AND PROCESS

- Kickoff, download and stakeholder interviews to understand context and objectives
- Did heuristic evaluation of existing materials
- Led team of researchers and delegated work
- Oversaw recruiting partner, and recruited participants in person in Cox retail stores
- Listened to call center and sales calls
- Observed in retail sales and fulfillment processes
- Led observational and evaluative in home studies of self-install process with current kit and prototype
- Led synthesis and contributed to journey mapping of the current experience
- Co-facilitated stakeholder debrief and action workshops

OUTCOMES

We provided Cox with a comprehensive understanding of the customer experience of the current self-install experience, as well as near-term and future opportunities for improvements, and collaborated with them to identify and roadmap actionable next steps.



Citibank

FINANCIAL SERVICES | SENIOR RESEARCH AND STRATEGY CONSULTANT

Citibank had a hypothesis around a new feature to help customers pay down their credit card debt. They hired me, as part of a consulting team, to help them understand relevant customer behavior and to test the feature concept.

I was the research lead, and worked closely with a strategy lead. Our stakeholders were Citi product leads.

OBJECTIVES

- Understand how customers segment, organize and categorize their spending
 - Understand the desirability of the paydown feature
 - Co-create the ideal feature experience with customers to understand desired details of use including frequency and automatic versus manual settings
 - Prioritize concepts based on customer feedback

METHODOLOGY AND PROCESS

- Conducted secondary research to understand context and objectives
 - Recruited participants through outside firm
 - Led co-creation panels with three distinct segments to journey map the ideal feature experience
 - Led synthesis of insights and recommendations
 - Reported back to client to identify next steps

OUTCOMES

Our research revealed that customers did not want and were very unlikely to use many aspects of the hypothesized feature based on their existing needs and behaviors.

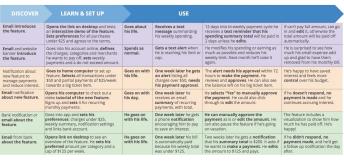
We highlighted aspects of the feature that were compelling, and provided lots of information about relevant behavior and underserved needs to help the team generate additional feature ideas for testing.

In reporting back to the client, we workshopped what components they might test next and how.

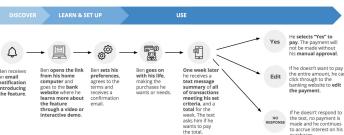
Journey mapping during co-creation workshops, journey mapping documentation and themes, prominent needs and mindsets which we presented along with lots of other behavioral insights, the Four Actions framework we used to make recommendations, and mocks of promising feature elements generated during the study which we recommended for further testing.



The Co-Created Journeys



Journey Themes



Provenant Mindsets & Needs



Four Actions

