Tayler Ramsay

VCI Performance Review - Q2 2024

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Reviewer

William Kratzer III **(Downward review)**

Vice President, Engineering

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1. What were 2-3 of this employee's biggest accomplishments from the first half of the year?

Tayler's biggest accomplishments in the first half of the year include:

- Getting our new look-and-feel and associated design system off the ground. From a business impact, this new design helps Versatile standout as a leader in design of consumer-facing financing applications.   This is crucial to maintain our lead in a market filled both long-lived competitors as well as new upstarts.   This new design is also crucial in restoring and improving the perception of our platform to our provider partners.

- Playing a key role in getting new designs done, not just for internal initiatives such as elective medical apply and retail apply, but also for new initiatives such as Aqua Finance, TD Commercial Application, and TGUC Financial. Getting Tayler involved in the upfront business and design discussions is important to the productivity of the engineering team and our delivery pipeline.

2. If you could have this employee redo 2-3 tasks or projects they worked on in the first half of the year, what would those tasks be, and what would you like to see them do differently/better this time around?

If I had a time machine and could have Tayler redo 2 projects, I would love to see how he would have tackled the TD Commercial Application changes and the Aqua Finance Project.   I say that because I think Tayler is starting to get some nice momentum with communication, platform knowledge, and confidence with participating on these types of calls.   I suspect that his approach and execution on these projects would be different - in all of the good ways!

3. What area(s) of this employee's skill set could use development?

Tayler's opportunity for improvement generally lie around non-technical skills, including:

1. Knowledge of Consumer Financing and of the general business. Designing the UI/UX for Versatile's product demands a high level of attention and knowledge of consumer financing. The more Tayler knows about the business of consumer financing, the better Tayler will get at implementing the UI/UX designs required for our implementations and eventually driving the UI/UX discussion.

2. Communication. Tayler can continue to work on clear, consistent, and regularly paced communication to stakeholders. Identifying stakeholders and keeping them in the loop is difficult -- as many stakeholders at Versatile are wearing many hats. However, Tayler can continue to refine these types of communication skills to maximize efficiencies with his workflows.

On the technical side, I agree with Tayler's objective at eventually obtaining a UX certification. I would like to see Versatile's UI/UX be #1 in the industry, and Tayler will need to find ways to grow his core skillsets outside of Versatile (since there is no Senior UX person to Tayler in our organization). Pursuing some formal training and certification would be a great first step on that journey.

4. What skill(s) does this employee possess that you believe we can better utilize in the future?

I think Tayler's design skills are top notch. I would love to see Tayler's design skills be leveraged outside of his current UI/UX projects. I think there are opportunities in corporate branding, presentations, or analytics visualization where Tayler's skill could be utilized to help Versatile put a better foot forward.

Tayler needs to continue to be integrated in engineering projects to help codify and cement the UX-first design principles we have started implementing this year.

5. What are 2-3 goals you have for this employee in the next quarter?

- I would like to see Tayler continue to take the lead role in leading meetings (internally and externally) where we gather requirements around UI/UX and review his designs. Specifically, we will need designs to support DELL Waterfall, TGUC Financial, Sunlight Financial, EasyPay, and VCA Retail Apply for TBC (including existing lenders ported over to retail apply, such as Acima, AFF, and Snap!)

- I'd like to see Tayler regularly communicate the status of his deliverables over email to required stakeholders (Brad, Alec, Joe, dev team, etc.).

- Tayler should work with myself and Brendan to identify a three training and certification opportunities (Google UX can be one of these).

Reviewer

Tayler Ramsay **(Self review)**

Senior UX/UI Designer

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1. What are 2-3 accomplishments from the first half of the year you are most proud of?

Design and Implementation of the Design System: I contributed to the design and implementation of our design system, focusing on critical elements such as ratio scales, vertical rhythm, documentation, and a standard component library. This foundational work allowed our developers to implement a customized system tailored to our use cases without worrying about scaling or technology changes. By abstracting the core and logic of the system, I aimed to ensure flexibility and future-proofing. The design leverages Prime, minimizing the need for extensive customization and simplifying the development process, thus empowering the junior developers to work on it.

Workflow for Implementing and Scaling Frontend Systems: The team has adopted my recommendations for implementing and scaling our frontend systems using Storybook and its addon Chromatic. This includes a structured design system and a streamlined workflow for implementing and updating the front end. These practices have improved our efficiency and consistency, ensuring that our front-end systems are scalable, maintainable, and seamlessly integrate into current processes without adding extra burdens.

Design and Implementation of PM Templating and Mocking System: I also released V1 of the PM templating and mocking system, which has significantly enhanced our UX/UI project management processes. This system includes comprehensive presentation and feedback loops, ensuring that all stakeholders are aligned and that the development process is iterative and responsive to feedback. This has led to more accurate project planning and execution, as well as improved overall team collaboration.

Enhanced Communication with Merchants and Providers: In addition to my technical contributions, I have taken on a more proactive role in communication with merchants and providers. By engaging with these stakeholders upfront, I have facilitated faster feedback loops, which has reduced development time and improved project outcomes. This direct communication has enabled us to address issues and incorporate feedback more swiftly, enhancing our responsiveness and efficiency.

2. If you could go back and redo 2-3 tasks or projects you individually worked on in the first half of the year, what would those tasks be, and what would you do differently/better this time around?

- **Regular Feedback Sessions:** Establishing internally a regular feedback sessions to continuously improve the workflow based on team experiences and challenges.
- **Feedback Analysis:** Implementing a system for analyzing feedback from merchants and providers to identify common themes and areas for improvement.
- **Enhanced Collaboration Tools:** Utilizing more advanced collaboration tools to streamline communication and ensure all feedback and discussions are documented and easily accessible.

3. What area(s) of your skill set do you feel could use development?

1. Cross-Departmental Understanding and Collaboration: Goal: Learn the processes of all departments and understand their key performance indicators (KPIs) to iterate on the design system effectively. **Action Plan:**

- **Process Mapping:** Spend time with each department to map out their processes and workflows. This includes marketing, sales, customer support, product management, and development.
- **KPI Analysis:** Understand the key metrics that each department uses to measure success and how they relate to the overall product performance.(For a baseline of the effectiveness of the Design Systems upcoming release.) This is also a great metric to have.
- **Regular Check-ins:** Establish regular check-ins with department heads to gather feedback and insights on how the design system can better address their needs and challenges. What is working what is not.(This is all about user experience) I cannot release something to the team that is not helpful or hindering. I will lose them as subscribers. The only way to know these answers is through research.
- **Iterative Design:** Use the insights gained to iterate and refine the design system, ensuring it aligns with and supports the goals of each department. Also keeping a close pulse on the product themselves.

2. Enhanced Communication Skills: Goal: Improve communication skills to facilitate better collaboration and understanding across teams and with external stakeholders. **Action Plan:**

- **Active Listening:** Practice active listening techniques to ensure I fully understand the perspectives and concerns of others before responding.
- **Clear and Concise Messaging:** Focus on delivering clear, concise, and actionable messages, both in written and verbal communication.
- **Feedback Incorporation:** Encourage and actively seek feedback on my communication style and make adjustments based on the input received.
- **Conflict Resolution:** Develop skills in conflict resolution to handle disagreements and misunderstandings constructively and maintain a positive working environment.

3. Leadership and Management Skills: Goal: Develop leadership and management skills to effectively lead projects and mentor team members. **Action Plan:**

- **Leadership Training:** I am eager to participate in leadership training programs or workshops. My goal is not only to prepare myself to potentially lead a UX team as we grow but, more importantly, to enhance my communication skills at a leadership level. I believe this will enable me to contribute more effectively to the company and support our continued success.
- **Stakeholder Management:** Improve stakeholder management skills by learning how to engage, communicate with, and manage expectations of various stakeholders effectively.
- **Mentorship:** Seek opportunities to mentor junior team members, providing guidance and support to help them grow in their roles.
- **Project Management:** Enhance project management skills ensuring projects are delivered on time and within scope.

4. What skills do you have that you believe we could better utilize in the future?

Skills for Better Utilization in the Future:

1. Cross-Departmental Interaction and Communication: Skill: Extensive experience interacting with multiple departments. **Opportunity:** My role involves regular communication with all stakeholders, providing a unique position to facilitate better cross-departmental communication. Through structured documentation and training, we can create a common language that ensures everyone is aligned, reducing misunderstandings and improving collaboration.

2. Central Role in Product Creation: Skill: Central involvement in the product creation process, touching every aspect significantly. **Opportunity:** Given my pivotal role, I can act as a bridge between different teams(and stakeholders), ensuring consistency and alignment throughout the product lifecycle. My maintenance of the frontend design system allows me to ensure that design standards are upheld across all projects.

3. Experience with Multi-Departmental Collaboration: Skill: Experience working in companies with multiple departments and collaborating effectively with all of them. **Opportunity:** My experience can be leveraged to improve inter-departmental workflows and reduce redundancy(special as we continue to grow). I can ensure that design and code development are more closely aligned. This structural change would empower me to have a stronger voice and prevent repeated work, leveraging my comprehensive knowledge of internal processes and jobs.

5. What are 3 of your most important goals for this upcoming quarter?

1. Enhancing and Refining Systems: Objective: Continue improving all key systems, including the design system, project management template, and mocking system. **Key Actions:**

- **Design System:** Further develop the design system to ensure it remains scalable, user-friendly, and aligned with the latest design trends and technologies. Help to see the components library project keeps getting attention.
- **Project Management Template:** Refine the project management template to streamline workflows, enhance collaboration, and ensure timely project delivery.
- **Mocking System:** Improve the mocking system to provide more accurate and realistic project simulations, enhancing the development process.
- **Outcome:** These improvements will lead to increased efficiency, better collaboration, and higher-quality outputs across all projects.

2. Strengthening Feedback Loops and Communication with Multi(stakeholders): Objective: Establish and enhance feedback loops with various departments to improve communication with merchants and providers. **Key Actions:**

- **Cross-Departmental Feedback:** Set up regular feedback sessions with different departments to gather insights and identify areas for improvement.
- **Merchant and Provider Communication:** Develop structured communication plans to engage with merchants and providers more effectively, ensuring their feedback is integrated into the development process.
- **Documentation and Training:** Create comprehensive documentation and conduct training sessions to ensure all stakeholders understand and utilize the improved communication channels.
- **Outcome:** Enhanced feedback loops and communication will lead to faster issue resolution, better stakeholder alignment, and improved product quality.

3. Achieving Google UX Certification: Objective: Complete the Google UX Certification to further enhance my skills and knowledge in user experience design. **Key Actions:**

- **Coursework Completion:** Dedicate time each week to complete the coursework and assignments required for the certification.
- **Practical Application:** Apply the learnings from the certification to current projects, ensuring that the new skills are integrated into our processes.
- **Assessment and Certification:** Successfully pass the assessments and obtain the certification.
- **Outcome:** The Google UX Certification will solidify my expertise in UX design, allowing me to bring new insights and best practices to the company, ultimately enhancing our product offerings.