
SAMPLE PORTFOLIO user experience

This portfolio incorporates selected samples of my work using a variety of research and design methodologies for:

- : Cummins, Inc.
- : Domino's Pizza
- : TracFone Wireless
- : Citizen's Bank
- : Sunglass Retailer*
- : New York-based Grocery Chain*

CUMMINS: CUSTOMER SERVICE SYSTEM (2015 – 2017)

Client

Cummins, Inc.

Industry

Diesel engine, filtration, and power generation product design, manufacturing, and distribution

DESIGN CHALLENGE

Bring together 5+ independent applications into a seamless, end-to-end engine service experience.

While performing contextual inquiry on one of Cummins' diagnostic applications (INSITE), it became obvious that Cummins had a serious usability issue with its customer service products. All applications and online resources were running as separate products instead of as a single system. This forced users to enter an incredible amount of the same information repeatedly during a single service job. With this report and other customer feedback, management secured funding for an end-to-end service and warranty claims system in 2015.

Engaging a user-centered approach to the design, my team and I, first performed contextual inquiry in the U.S., China, and Columbia at 12 dealer and distributor locations. After analysis, we then engaged internal stakeholders to work with us in concept workshops and created multiple approaches to the design solution. I developed paper prototypes of the three strongest and most unique concepts and we facilitated 3x3 iterative design and usability testing in multiple U.S. cities. We then refined the concepts into a single design wireframe set using Axure.

User Groups

Dealers and Distributors Worldwide – Service Writers, Service Technicians, Warranty Administrators, and management personnel

While working through detail design with the independent internal teams that managed the existing applications, we also performed remote international and in-person U.S. usability tests to ensure that the system met end-user and business needs. I created paper and interactive prototypes using Axure for these activities and managed the overall wireframe set for development. I was contracted again to assist the front-end developers in a transitioning Agile environment.

Deliverables

- : U.S., China, and Columbia contextual inquiry – results report and recommendations
- : Domestic 3x3 iterative design and usability testing – multiple paper prototype options, test plan and artifacts, findings and recommendations report
- : Remote international usability testing – test plan and artifacts, findings and recommendations report
- : Single Axure wireframe set depicting the recommended workflow and user interface

The initial release, which included service intake, diagnostics, and repair, launched to 200 Cummins distributors in 2016 with plans to release to the remaining 400 distributors and over 6,700 dealers in 2017. In early 2016, I was again contracted to design the remainder of the system, which included the warranty claims process. This required consolidating two separate applications into one process flow. I worked independently with representatives from both applications for approximately 10 months. Before development was scheduled to begin, I convinced management to allow me to perform final usability testing at four U.S. dealer locations to ensure there were no show-stopping usability issues. The workflow and concept was on track and it allowed our team to make additional refinements based on end-user feedback.

A walk-through of the system is available on YouTube at: www.youtube.com/watch?v=yap7c3jUoLw&t=14s

The following pages represent a sample of the overall Customer Service System reports and wireframe set.

Additional projects for Cummins included:

Timeline

- : *Contextual Inquiry* – 3 months
- : *3x3 Iterative Design and Usability Testing* – 2 months
- : *Detail Design (Customer intake and service event)* – 9 months including launch
- : *Detail Design (Warranty claims)* – 10 months
- : *Usability Testing and Refinements (Warranty claims)* – 3 weeks

- : **Power Generation Dealer Portal** (2015) – created usability strategy for improving the Siebel 'out-of-the-box' design for Cummins Power Systems dealers integrating UX best practices and user feedback. Facilitated two usability tests, three conference room pilot sessions with customers, and provided multiple recommendation reports.
- : **INSITE Contextual Inquiry** (2014) – facilitated contextual inquiry at ten U.S. locations to improve the usability of the service diagnostic application.
- : **User Experience at Cummins** (2014) – added further methodology content and refined the overall design of the existing user experience team capabilities presentation.
- : **Global Warranty Systems** (2014) – refined the existing user experience strategy that was put in place by a development-focused team to incorporate more early-on, direct end-user feedback.

CUMMINS: CUSTOMER SERVICE SYSTEM (2015 - 2017)

Samples from Contextual Inquiry Reports

Cummins INSITE Diagnostic Application

Integration Issues: Application Overload

Application Overload
Changes with Location and Roles

Issues and Recommendations Summary

| Issue Number | Description | Severity Rating | Issue Category | Recommendation |
|--------------|-----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Trouble Trees Not Fully Functional. It appears that all links to procedures are broken forcing the user to search the tree. | FAILURE | Task Support Trust/Privacy | <ul style="list-style-type: none"> Fix this bug to link user with supporting content in GSOL Redesign INSITE to put the GSOL procedure content into INSITE on demand, without opening GSOL |
| | Difficult to available for all in the trouble tree GSOL | High Severity | Task Support | <ul style="list-style-type: none"> Insert photos or diagrams of primary components referenced in trouble tree content |
| | Difficult to 1 last step in between Fault | High Severity | Presentation | |
| | Difficult to small to read | Moderate Severity | | |
| | Difficult to sms and photos | FAILURE | | |

Create Mechanisms to Monitor / Log Data

Cummins Service System

The Artifacts of a Job Grow As It Evolves

ROLES

TASKS

ARTIFACTS

Making Sense of the Data

Analysis Spreadsheet

Post-Session Survey

Demographic Data

Workflows

The Artifacts of a Job Grows As It Evolves

Engine Details for Warranty
Customer Information

Warranty
Work/Repair Order

Job Story
Engine Image

Parts List
Labor
Photos

Quote

Actuals Costs
Actual Labor
Engine Intake

Invoice
Payment Received

Warranty Claims
Warranty Payment

Different users need access to the same information along the job flow.

CUMMINS: CUSTOMER SERVICE SYSTEM (2015 - 2017)

3x3 Iterative Design and Usability Test Report

Concept One



Separates 'site' from 'application'

Role-based job 'steps'

Flexible 'wizard' navigation (i.e., 'guided')

Connection status

Left hand Job Story content 'grows' as job progresses

Main work area

Concept One: Service Writer's View

Task 1: Intake an existing customer's complaint.

Concept One: Technician's View

Task 1: Understand / duplicate the customer's complaint.

Concept One: Warranty Admin's View

Task 1: Generate a new claim.

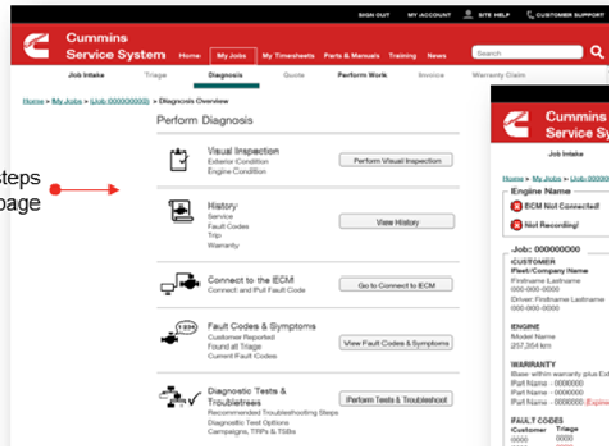
CUMMINS: CUSTOMER SERVICE SYSTEM (2015 - 2017)

3x3 Iterative Design and Usability Test Report

Concept Two

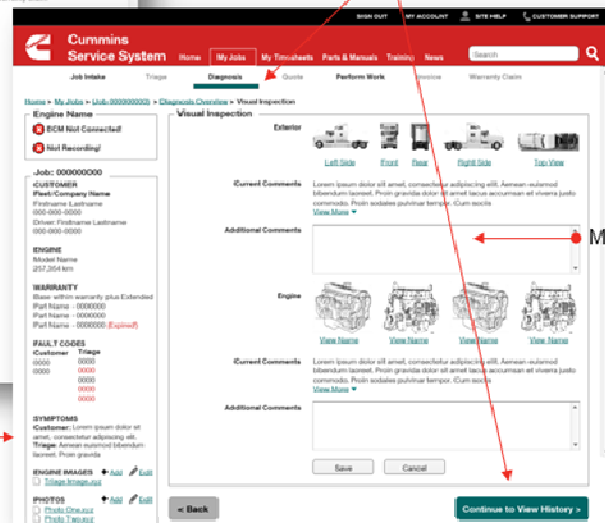


Process steps
overview page



Story 'grows' as
job progresses

Fewer navigational
components (i.e., 'soft guided')

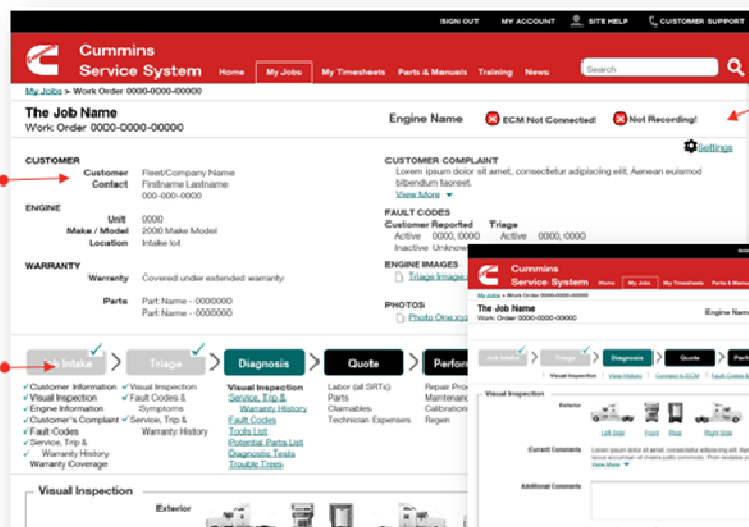


Main work area

Concept Three



Collapsible
Job Story
content
'grows' as
job progresses

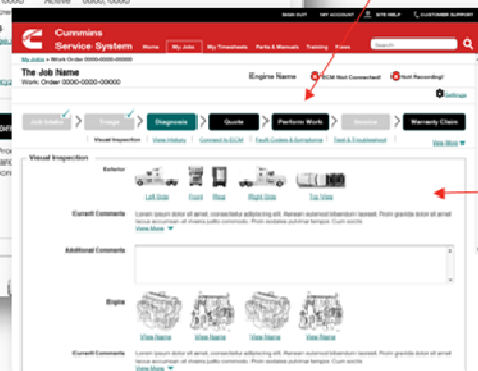


Collapsible
role-based
job 'steps'

Connection status

Flexible role-based
'wizard' navigation (i.e.,
'guided')

Main
work area

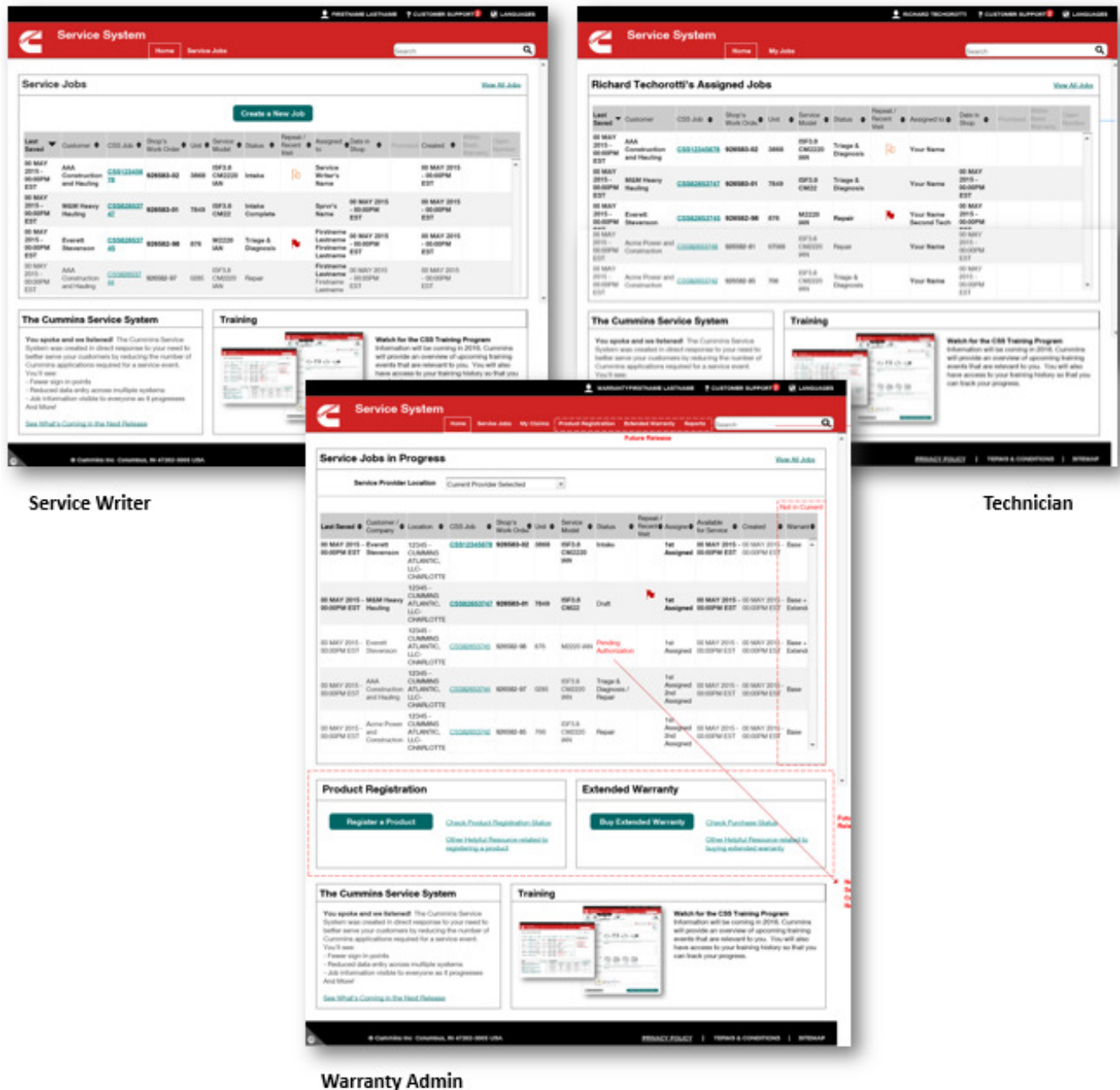


CUMMINS: CUSTOMER SERVICE SYSTEM (2015 - 2017)

Final Wireframe for Responsive Design

A walk-through of the system is available on YouTube at: www.youtube.com/watch?v=yap7c3jUoLw&t=14s

Role-based Home Pages



CUMMINS: CUSTOMER SERVICE SYSTEM (2015 - 2017)

Customer Intake – Side-by-side Responsive Solution

Service System

[Home](#)
[Service Jobs](#)

Intake

Triage & Diagnose

Job Plan

Repair

Warranty Claim

Invoice

Customer

Unit & Engine

Customer's Complaint

Visual Inspection

View History

Warranty

Review Job

Print Email

Job Overview

Customer:

866374-40

CSS Job:

926563-03

Shop's Work Order:

ESN: 987654321

Last Saved: DD MMM YYYY 00:00:00

[View More](#)

View History

Connected Diagnostic Alerts

[Go to the Connected Solutions Service Event Dashboard](#) to see historical data and current engine status for this ESN.

| Fault Codes (last 30 days) | Last Occurrence | Count |
|----------------------------|-----------------|-------|
| 0000 - Name of Fault Code | 00:00:00 | 45 |
| 1111 - Name of Fault Code | 00:00:00 | 2 |
| 3333 - Name of Fault Code | 00:00:00 | 33 |
| 4444 - Name of Fault Code | 00:00:00 | 12 |
| 5555 - Name of Fault Code | 00:00:00 | 56 |
| 7777 - Name of Fault Code | 00:00:00 | 4 |
| 2222 - Name of Fault Code | 00:00:00 | 8 |
| 6666 - Name of Fault Code | 00:00:00 | 7 |

Service History

| Date | Customer | CSS Job | Shop's Work Order | Service Model Name | Work Summary | Fault Codes & Symptoms | Miles/Km/Hrs |
|---------------------------|------------------------------|------------|-------------------|--------------------|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------|--------------|
| 00 APR 2015 - 00:00PM EST | AAA Construction and Hauling | 00000-0000 | | ISF3.6 CM22 | 3 Repairs Made 1 Part Replaced | Symptoms: white smoke, 2nd symptom | 84,230 miles |
| 00 FEB 2015 - 00:00PM EST | AAA Construction and Hauling | 00000-0000 | | ISF3.6 CM22 | 3 Repairs Made 2 Parts Replaced | Primary FCs: 0000, 1111, 2222, 3333 | 66,204 miles |
| 00 JAN 2015 - 00:00PM EST | AAA Construction and Hauling | 00000-0000 | | ISF3.6 CM22 | 3 Repairs Made 2 Parts Replaced 1 Part Replaced | Primary FCs: 0000, 1111, 2222, 3333 Symptoms: white smoke, 2nd symptom max 4 lines... | 55,283 miles |
| 00 FEB 2014 - 00:00PM EST | AAA Construction and Hauling | 00000-0000 | | ISF3.6 CM22 | 2 Repairs Made 2 Parts Replaced | Primary FCs: 0000, 1111, 2222, 333 | 48,000 miles |
| 00 MAY 2013 - 00:00PM EST | AAA Construction and Hauling | 00000-0000 | 00006-0006 | ISF3.6 CM22 | 3 Repairs Made 2 Parts Replaced 1 Part Replaced | Primary FCs: 0000, 1111, 2222, 333 | 46,000 miles |
| 00 JAN 2012 - 00:00PM EST | AAA Construction and Hauling | 00000-0000 | | ISF3.6 CM22 | 2 Repairs Made 2 Parts Replaced | Primary FCs: 0000, 1111, 2222, 333 | 10,000 miles |

Customer's Complaint

Review Job

Save

Exit

Job is Finished or Canceled - Save & Close

[illegible]

CUMMINS: CUSTOMER SERVICE SYSTEM (2015 - 2017)

Diagnosis & Repair – Side-by-side Responsive Solution

Service System

Home My Jobs

Job Overview

Customer: Blount Street Logistics
CIS Job: 8205314-80
Shop's Work Order: 8205314-03
ESN: 867654321
Service Model: ABC000000000

Job Created: 02 MAR YYYY 08:00:00PM EST0X
Date to Shop: 02 MAR YYYY 08:00:00PM EST0X
Last Saved: 02 MAR YYYY 08:00:00PM EST0X

Fault Code: 1285
Related Fault Codes: 3333, 5555

Estimated Diagnosis SRT: 00 hours 00 minutes

Need to escalate this job?
If you need diagnostic assistance or are unable to find the root cause, view how to escalate this job.

Available Campaigns for Fault Code 1285
Campaign Name: One More Campaign Name...
Total: 0

Available TRPs & TSDs

Helpful Resources

Overview

Preparation

Repair Steps & Tests

Dynamic engine system analysis... Engine oil pressure sensor circuit rep...

Dynamic Engine System Analysis (DESA) test
Solution ID: ABC000000000

DESCRIPTION
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod. Proin gravida bibendum tunc, Proin gravida bibendum accumsan et viverra justo commodo. Proin sodales pulvinar tempus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

RESOLUTION
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod. Proin gravida bibendum tunc, Proin gravida bibendum accumsan et viverra justo commodo. Proin sodales pulvinar tempus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

Refer to Repair Procedures 302-305

Socile justo commodo. Proin sodales pulvinar Caenean euismod bibendum tunc, Proin sodales pulvinar tempus. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

Refer to Repair Procedures 123-456

Compound Solution Analysis
You will need to perform the following analysis

| Solutions | Repairs |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Engine Health Analysis 1. Low pressure fuel supply system 2. ECU differential pressure Aftermarket Health Analysis 1. Engine oil M.O. - checked | 1. repair found 2. Fixation repair code 3. Stop repair 4. View repair |

ACCESSIBILITY CHECKLIST FOR WARRANTY NEEDS
Be sure to complete this checklist form in order to include all the correct SRTs in the job.
Open the Accessibility Checklist

* Required
Is THIS THE RESOLUTION?
☐ Repair successful.
☐ Repair successful with additional parts / procedures.
☐ Repair performed but did not resolve the root cause.
☐ Repair not performed.

View Verification History

Your Notes *

Remaining Characters: 4,000

Report a Problem with this Solution.

Save Return to Repair Overview Continue to Next Solution Exit

Job is Finished - Save & Close Cancel Job

Service Supervisor Role Only

Site Title Display

Job Overview

Customer: Blount Street Logistics
CIS Job: 8205314-80
Shop's Work Order: 8205314-03
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☐ Repair not performed.

View Verification History

Your Notes *

Remaining Characters: 4,000

Report a Problem with this Solution.

Save

CUMMINS: CUSTOMER SERVICE SYSTEM (2015 - 2017)

Warranty Claim Creation

Service System

Home Service Jobs My Claims Product Registration Extended Warranty Reports

Intake Triage & Diagnosis Job Plan Repair Warranty Claim Invoice

Job Overview

Customer / Company: Bladuer Street Logistics
CSS Job: C5040537480
Product Serial Number: 123456789 **Repeat Visit!** **Catastrophe!**

Most Recent Activity: Job Overview Viewed
Last Saved: DD-MM-YYYY 00:00:00 EDT00
Status: Draft

Type of Claim

Claim Type in Use: Product Warranty
Before In Service: No

Fixed Reserve

Claim Number: 123456789 **Vehicle Only**

Service Provider / Assigned To

Location: 12345 - CUMMINS ATLANTIC, LLC-CHARLOTTE

Authorizations & Reference Numbers

Technical Service Request (TSR): 0123456789
[Technician Certification](#)
[Warranty Exception Request](#)
[Add Authorization Number](#)

Failures, Campaigns, TRPs and ATCs

Failure Codes: 12345
Special: Exhaust 123

Warranty Coverage

Display Coverage in: ☒ Miles ☐ Hours **350,000 Miles or 7,000 Hours** **Check Parts, Components or Failure Coverage**

Basic Warranty

Excluded: **!**
 Warranty Start: 14 APR 2012
 Warranty End: 14 APR 2014 or 350,000 Miles or 7,000 Hours
 Coverage: 24 Months or 350,000 Miles or 7,000 Hours
 Remaining: 1 Year, 3 Months and 3 Days or 30,000 Miles or 7,000 Hours
 Deductible: \$1,000.00
[View Warranty Detail](#)

New Part Warranty

Product Part or Component Name (XXXXXXXX - Part number if available)
 Warranty Start: 14 APR 2012 or 350,000 Miles or 7,000 Hours
 Warranty End: 14 APR 2014 or 350,000 Miles or 7,000 Hours
 Coverage: 24 Months or 350,000 Miles or 7,000 Hours
 Remaining: 1 Year, 3 Months and 3 Days or 30,000 Miles or 7,000 Hours
 Deductible: \$1,000.00
[View Warranty Detail](#)

New or Recon Parts Warranties

If the customer has additional warranties for New or Recon Parts, the following must be collected:

- Part Number
- Part Type (Recon, New or Service Tool)
- Invoice Number
- Installation or Invoice Date
- Mileage or Hours at Install

[Check for New or Recon Parts Warranties](#)

Additional Policies

You can check for other policies that may exist in filing a claim for a customer.

[Check for Support Policies on the Policy Request System](#)
[Check Local / Other Policies](#)

Warranty and/or Policy Exception Request

Additional Policy Exception Request

If it is determined that a policy exception may be possible, you can use the link below to initiate the process.

[Request Policy Exception](#)

Helpful Resources

No Product Serial Number 123456789
[Warranty Admin Manual](#)
[Support Policies in Policy Request System \(TRP\)](#)
[Product Coverage Manual](#)
[Fast Code Manual](#)
[New Daily Part Code Manual](#)

Parts & Other Claimables

[Download Parts Return List](#)
[Download Parts Return Detail and Instructions](#)

Parts & Components

| Part Description | Failure | Reason | Part Number | Requested Quantity | Approved Quantity | Return to Factory | Tracking Number | WID Number | Unit Price (USD) | Requested Amount (USD) | Approved Amount (USD) | Reason for Adjustment |
|-----------------------------------|------------------------------|----------------------|--------------|--------------------|-------------------|-------------------------------------|--------------------------------------|---------------------------------|------------------|------------------------|-----------------------|--------------------------------|
| Turbocharger Seal | Special Exhaust Not Air Leak | Root Cause | 0000-11-0111 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Turbocharger Valve | Special Exhaust Not Air Leak | Damaged Upon Removal | 20-23-2-232 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Turbocharger Unit | Special Exhaust Not Air Leak | Root Cause | 3000033-3 | 1 | 0 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$0.00 | |
| Crankcase Seal | Crankcase Seal | Progressive Damage | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Crankcase Valve | Crankcase Seal | Progressive Damage | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Lower Gear Seal | Lower Gear Seal | Progressive Damage | 1234567-89 | 1 | 0 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$0.00 | |
| Oil Cooler Seal | Oil Cooler Seal | Progressive Damage | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Cooler Weights | Oil Cooler Seal | Progressive Damage | 1234567-89 | 5 | 3 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$0.00 | Doesn't Have Warranty Coverage |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
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| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
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| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
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| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
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| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
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| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 9876543-21 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
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| Oil Campaign Associated Part Name | | | 1234567-89 | 1 | 1 | <input checked="" type="checkbox"/> | View Tracking Number | View WID Number | \$500.00 | \$500.00 | \$500.00 | |
| Oil Campaign | | | | | | | | | | | | |

DOMINO'S PIZZA: DOMINOS.COM PIZZA PROFILE and EASY ORDER (2013)

Client

Domino's Pizza

Domino's had added functionality to their consumer site that saved the last five online orders placed by customers with an account profile. This functionality enabled users to designate one order as an "Easy Order" allowing them to reorder a saved order as-is, or use it as the starting point for a new order.

Industry

Franchised pizza restaurant chain

Domino's wanted to understand how the new functionality affected current online customers including:

DESIGN CHALLENGE

Improve the overall user experience of Dominos.com Easy Order.

- : Which elements help or hinder placing an order
- : Which elements of the new functionality are the most appealing and therefore should be promoted to consumers
- : Opportunities for improving the user's online ordering experience which can ultimately lead to more orders and additional revenue

User Groups

Domino's three key U.S. online consumer groups:

- : Loyal customers
- : Value-oriented customers
- : Speed-oriented customers

I planned and facilitated lab-based and remote (via web-based chat) usability tests with 24 total users. After performing data analysis, I created design solutions and presented to Domino's internal team and management. Domino's implemented much of the recommendations presented – most of which are still in place today.

The following pages represent a sample of the overall report and design recommendations.

Deliverables

- : Traditional lab-based and remote usability design testing
- : Test plan and artifacts, findings and design recommendations report

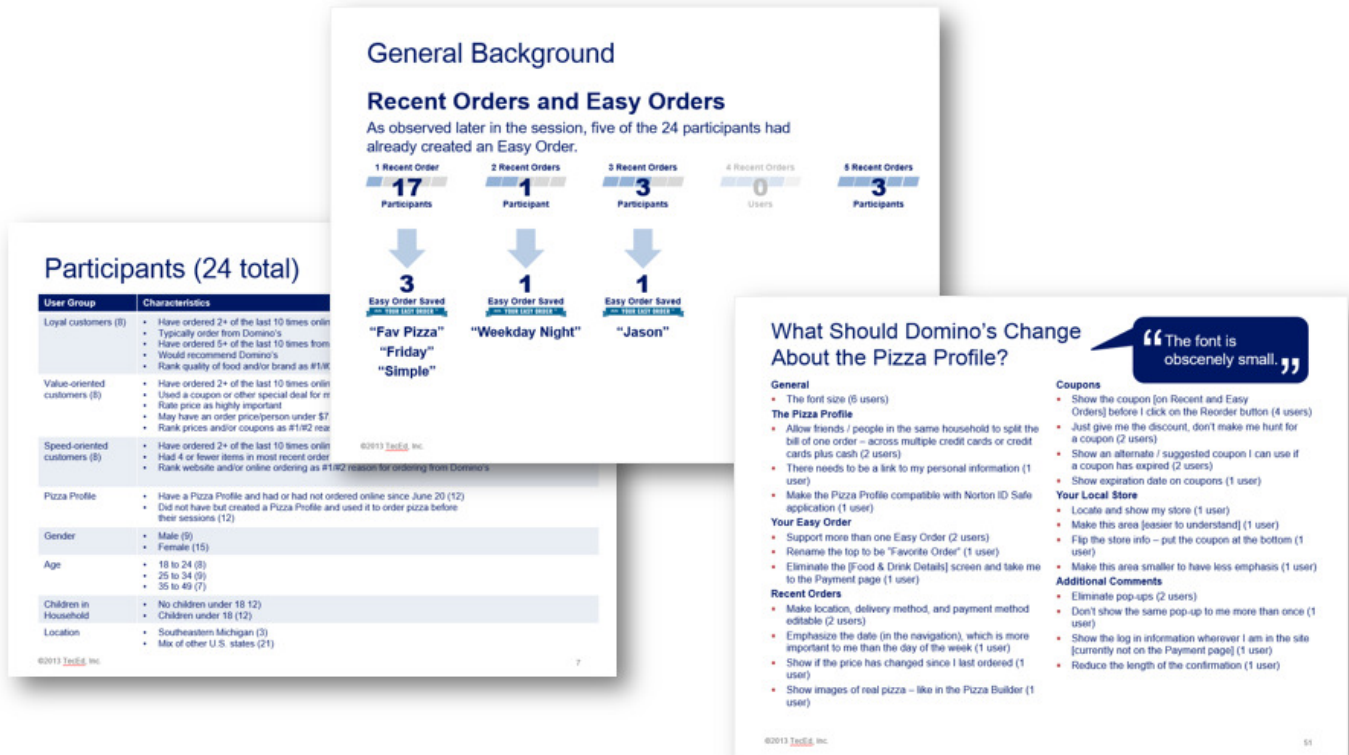
Timeline

7 weeks

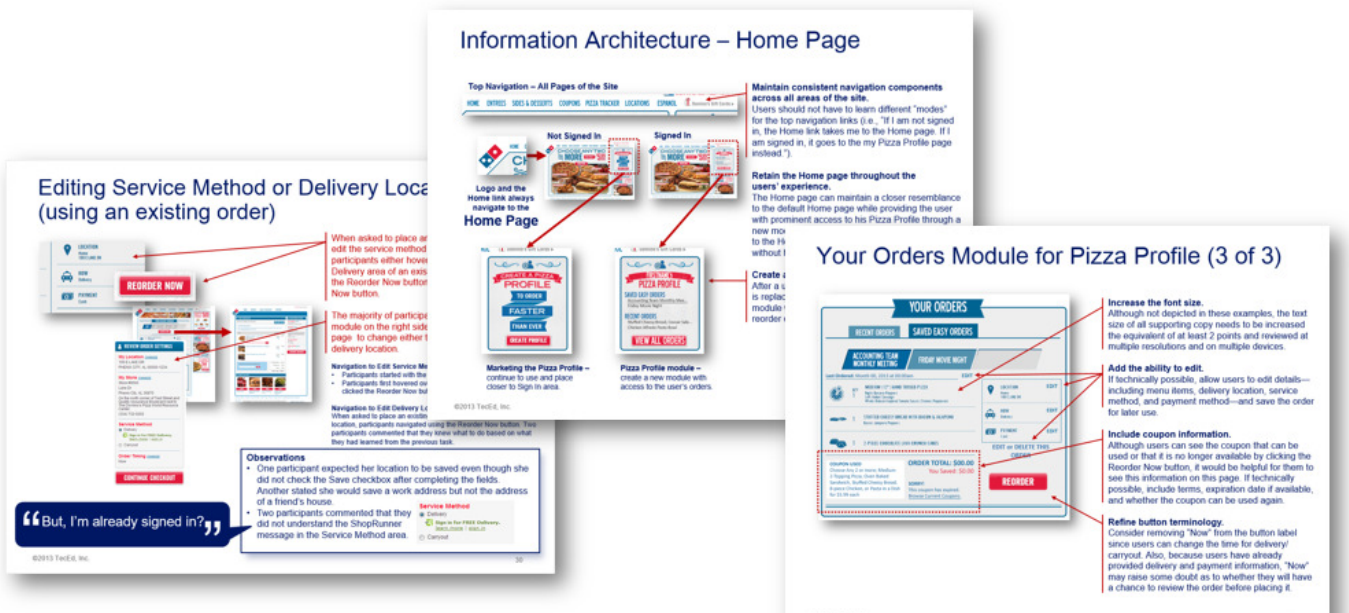
DOMINO'S PIZZA: DOMINOS.COM PIZZA PROFILE and EASY ORDER (2013)

Samples from Usability Test and Design Recommendations Reports

Study Design and Background Interviews



Detailed Findings and Design Recommendations



TRACFONE WIRELESS: SMALL BUSINESS PLANS (2013)

Client

TracFone Wireless – International pre-paid telecommunications provider

Industry

Telecommunications

DESIGN CHALLENGE

Establish a new brand that targets small business owners looking to consolidate, reduce, and streamline their fleets' mobile needs and expenses. Create an easy-to-use online experience using the WebSphere eCommerce Madison starter store while maintaining 'out-of-the-box' functionality with limited customization.

User Groups

Small business owners and their buyer admins

Deliverables

Initial creative sketch and Axure-based wireframe set of recommendations using existing research and out-of-the-box functionality

Timeline

15 weeks

Due to immediate time-to-market requirements, upfront user research was limited to what could be gathered through business, marketing, and technology stakeholder interviews, which I facilitated or participated in.

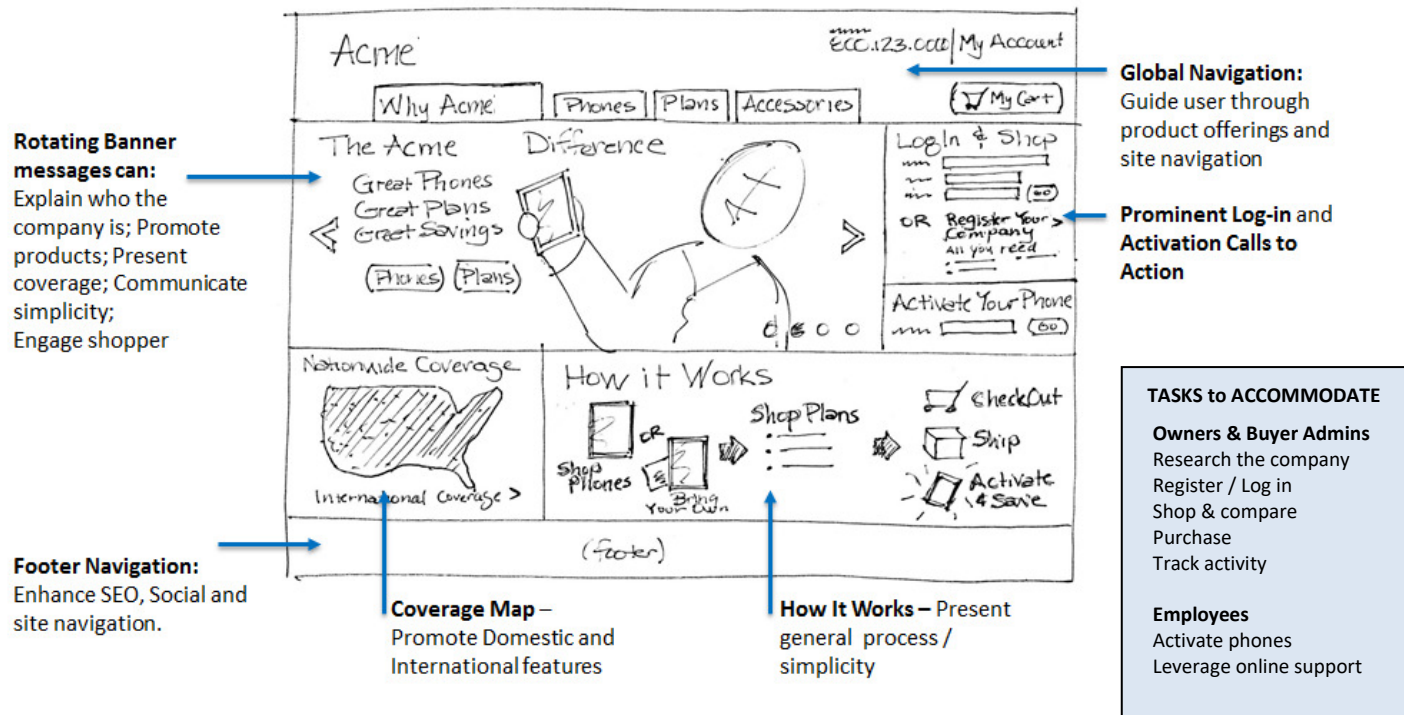
Working directly with the client, I determined business and general brand requirements within a two-week period. While the marketing team engaged in naming and visual identity activities, I created a full working set of wireframes recommending a general brand approach, a reduced work flow, and content recommendations for:

- : Product and service browsing and comparison
- : Required product and service cross-sell for enabling add-to-cart
- : Checkout and account creation
- : Integration of existing portal systems

The following pages depict sample concept sketches and wireframe screens I produced of the recommended user experience.

TRACFONE WIRELESS: SMALL BUSINESS PLANS (2013)

Home Page Concept and Wireframe



Brand X logo My Account | Sign Out | Help & FAQs | Contact Us

[Why Brand X](#) [Phones](#) [Plans](#) [SIM Cards](#) [Activate](#) My Cart (1)

The Brand X Difference
Great Phones
Great Plans
Great Savings
[Phones](#) [Plans](#)

Sign In & Shop
Email: _____
Password: _____ **Go**
[Forgot Password?](#) | [Create User Profile](#)

Create an Account for Your Organization
All you need is a Tax ID and a Zip Code
[Activate Your Phone](#)

Nationwide Coverage
International calling >>

See How Much You Can Save OR Plan Recommender

© 2013 Brand X | [Help & FAQs](#) | [Contact Us](#) | [Hearing Aid Compatibility](#) | [Privacy](#) | [Terms & Conditions](#) | [Site Map](#)

TRACFONE WIRELESS: SMALL BUSINESS PLANS (2013)

Plans Landing Page

Brand X logo

My Account | Sign Out | Help & FAQs | Contact Us

Why Brand X | Phones | Plans | SIM Cards | Activate

My Cart (1)

Home > Plans

Narrow your results by:

Plan Types

Unlimited (00)

30-day monthly (00)

Pay-as-you-go (00)

Domestic (00)

International (00)

Compatible Phones

Smart phones (00)

Feature phones (00)

Talk & text only (00)

Bring your own - SIM card only (00)

Minutes

Unlimited (00)

Carry over (00)

Up to 250 (00)

Up to 500 (00)

Up to 750 (00)

Up to 1,500 (00)

Shop Plans

Plans: 00

Displaying 1 - 0 of 00 plans <1-00> [View All](#)

Sort by: No Sort

Smart Phone Compatible

Plan Logo

Plan Name could be long

- Feature lorem ipsum ontrary to popular belief
- Lorem ipsum is not simply random text.
- It has roots in a piece of classical Latin literature and has been used for centuries to present copy
- Richard McClintock, a Latin professor at Hampden-Sydney first described it
- Lorem ipsum is not simply random text.

~~\$000.00~~
RETAIL PRICE
\$000.00

Add to Compare List

Smart Phone Compatible

Plan Logo

Plan Name could be long

- Feature lorem ipsum ontrary to popular belief
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- Richard McClintock, a Latin professor at Hampden-Sydney first described it
- Lorem ipsum is not simply random text.

~~\$000.00~~
RETAIL PRICE
\$000.00

Add to Compare List

Plan Logo

Plan Logo

Plan Logo

Need more airtime for your existing plan?

Sign In to Buy More Airtime

Smart Phone Compatible

Plan Logo

Plan Name could be long

- Feature lorem ipsum ontrary to popular belief
- Lorem ipsum is not simply random text.
- It has roots in a piece of classical Latin literature and has been used for centuries to present copy

~~\$000.00~~
RETAIL PRICE
\$000.00

COMPARE up to 4 plans

[Clear List](#)

Unlimited [X Remove](#)
International
Talk, Text, Data

Unlimited [X Remove](#)
Talk, Text, Data

Pay-As-You-Go [X Remove](#)
750 Minutes

Pay-As-You-Go [X Remove](#)
1,500 Minutes

Compare

{RightSideBarAds}

600 FOLD

TRACFONE WIRELESS: SMALL BUSINESS PLANS (2013)

Product Detail Page


Brand X logo

My Account | Sign Out | Help & FAQs | Contact Us

Why Brand X | Phones | Plans | SIM Cards | Activate

My Cart (1)

[Home](#) > [SIM Cards](#) > Product Name



SIM Card Name could be long

~~\$000.00~~ **\$000.00**
RETAIL PRICE

Compatible with plans from **\$00.00 to \$000.00** [View All Plans](#)

- Feature lorem ipsum entry to popular belief
- Lorem ipsum is not simply random text.
- It has roots in a piece of classical latin literature and has been used for centuries to present copy
- Richard McClintock, a Latin professor at Hampden-Sydney first described it

In Stock

* required

Shows on Smart Phones only

Note! This SIM card requires enrollment in Auto Refill. [What's this?](#)

Zip Code: 44444 [Edit](#)

Shows on Smart Phones only

☒ I already have a Brand X plan for Business [What's this?](#)

* Plan:

* Quantity:

Smart Phone Plan Dropdown content:

Select

Unlimited Domestic (\$00.00)

Unlimited International (\$00.00)

600 FOLD

[Add to Cart](#) [Add to Compare List](#)

COMPARE

up to 4 SIM Cards

[Clear List](#)

4G Standard [X Remove](#)
SIM Card

4G Micro [X Remove](#)
SIM Card

Lorem Ipsum [X Remove](#)
SIM Card

Lorem Ipsum [X Remove](#)
SIM Card

[Compare](#)

Description [Compatible Plans](#)

Operating Systems
Android™ 2.3

Compatible Phones

- Smart phones
- Feature phones
- Talk & text only phones

Operating Systems
Android
iOS®
Windows phone®

Network Speed
42Mbps
3G
4G

SEO Header Lorem Ipsum

SEO Description Copy Utiles augue, rutrum at sedales ac, ullamcorper placerat vel in cursus. Nullam tristique lorem a lectus venenatis id facilisis laudibus ipsum, nec ullamcorper metus volutpat quis. Phasellus iaculis fermentum dictum. Proin arcu ligula, ornare in pellentesque sed, volutpat eget enim. In ornare posuere justo ut facilisis. Cras lincidunt egestas mi, sed interdum tellus tristique quis. Morbi convallis scelerisque nibli, sit amet pretium sapien gravida varius.

Compatible Plans tab

[Description](#) [Compatible Plans](#)

Works with These Great Plans

- Unlimited Domestic (\$00.00)
- Unlimited International (\$00.00)

Shows on Smart Phone Plans only

Note! This SIM Card requires enrollment in Auto Refill. [What's this?](#)

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CITIZENS BANK: PERSONAL CHECKING PRODUCT PLANS (2012)

Client

Citizens Bank – Personal Banking

Citizens Bank, like many other financial institutions at the time, was looking for ways to provide consumer incentives that combine with their existing checking products. The business developed a series of products including:

Industry

Financial Services

- : *Value Plan* – discounts, cash back, and purchase protection for a monthly fee
- : *Secure Plan* – credit monitoring, internet surveillance, card and document registration, and fraud resolution for a monthly fee
- : *Combined Plan* – the Value and Secure Plans at a reduced monthly rate

DESIGN CHALLENGE

Introduce a new product line targeted to consumers that incents them to sign up. Plans include Value Plan, Security Plan, and a Combined Plan offering rewards, discounts, and services for a monthly fee.

Working with a small team and iterating with the client, I designed the work flow, interaction designs, and layout in Visio wireframe format. Over the course of one week, the prototype was usability tested at Bentley University in Boston. Working closely with the researcher and a visual design team in New York, recommendations from the usability test that were accepted by the client were included in the final design to enhance the overall experience.

User Groups

Online banking consumers

Although sign-up on the site was initially high, the products were eventually phased out. However, the microsite was recognized by the Horizon Interactive Awards and Interactive Media Awards:

Deliverables

Visio wireframes depicting the full experience. The technical team developed an interactive prototype for usability testing.

- : *2011 Horizon Interactive Awards* – Gold: Consumer Information (websites); Silver: Animation (websites); Bronze: Training and Instructional (video)
- : *2012 IMA (Interactive Media Awards)* – Best in Class Award

Timeline

10 weeks

CITIZENS BANK: PERSONAL CHECKING PRODUCT PLANS (2012)

Introduction Video



[Personal](#)
[Small Business](#)
[Commercial](#)
[Investing](#)
[Customer Service](#)
[Open an Account](#)

[Checking](#)
[Savings, Money Markets, & CDs](#)
[Borrowing Options](#)
[Students](#)
[Credit Cards](#)
[MoneyHelp®](#)
[Online & Mobile Banking](#)

Value Plan: \$6.99
Secure Plan: \$6.99
Combined Plan: \$10.99
BEST VALUE

Skip to Tool



Average Monthly Customer Value

\$3.60 PURCHASES + \$12.50 DINING + \$2.70 SHOPPING + \$6.60 EVENTS = \$25.40

Welcome to the Citizens Bank Plans Interactive tool.

00:42 / 02:00

CC Closed Captioning

ENROLL NOW!

Checking Account Holders:

Log in to Online Banking then:

[Log In To Online Banking](#)

1. Go to "Manage Features"
2. Select the "Plans" page
3. Select your Plan(s) and Enroll

Don't have a Checking Account? Open one now.

In branch: Zip Code:

By phone: 1-877-360-2472

Online: [Select & Open a Checking Account](#)

[In the Community](#) | [About Us](#) | [Careers](#) | [Branch/ATM Locator](#)
[Member FDIC](#) | [Equal Housing Lender](#) | [Site Map](#) | [Security & Privacy & Legal](#)
* You will see your first deduction in 60 days, otherwise, you will see it in 30 days.

PLANS DISCLOSURE: All benefits, with the exception of the GreenSense benefit, are provided by The CPP Insurance Agency, LLC, which will be referred to as "CPP", or CPP's third party providers. Citizens Bank is not an affiliate of nor is it responsible or liable for the services provided by CPP.



CITIZENS BANK: PERSONAL CHECKING PRODUCT PLANS (2012)

Value Plan Landing Page (with overlay quick guide)



[Personal](#)
[Small Business](#)
[Commercial](#)
[Investing](#)
[Customer Service](#)
[Open an Account](#)

[Checking](#)
[Savings, Money Markets, & CDs](#)
[Borrowing Options](#)
[Students](#)
[Credit Cards](#)
[MoneyHelp®](#)
[Online & Mobile Banking](#)

Value Plan: \$6.99

Watch your money add up with our Value Plan

The \$6.99 per month **Value Plan** can pay for itself in savings, discounts and cash back. The average customer enjoys **\$41.55 a month in savings** and earns \$3.60 a month cash back. Subtract the \$6.99 and that's \$38.00 a month (or over \$458.00 per year) of money in your pocket.

Combined Plan: \$10.99 **BEST VALUE**

[Watch Overview Video](#) [Plan Benefit Details](#)

YOUR TOTAL MONTHLY VALUE **AVERAGE TOTAL MONTHLY VALUE**

\$45.15

[Explore Your Personalized Savings](#)

How many times **PER WEEK** do you...

Debit Card Purchases and Online Bill Payments

Learn How It Works

0 1 to 6 **7 to 12** 13 to 18 19 to 24 25+

\$0.00 earnings **\$3.60 earnings**

How many times **PER MONTH** do you do the following?

Dine Out at Restaurants

Learn How It Works

0 1 2 3 4 5+

\$0.00 savings **\$12.50 savings**

Shop for Clothes, Electronics, etc.

Learn How It Works

0 1 2 3 4 5+

\$0.00 savings **\$2.70 savings**

Entertainment, Events and Attractions

Learn How It Works

0 1 2 3 4 5+

\$0.00 savings **\$6.60 savings**

How many times **PER YEAR** do you do the following?

Travel, Vacations and Getaways

Learn How It Works

0 1 2 **3** 4 5+

\$0.00 savings **\$19.75 savings**

DEBIT CARD AND ONLINE BILL PAY **\$0.00**

SAVINGS **\$0.00**

PLAN COST **\$6.99**

YOUR TOTAL MONTHLY VALUE **AVERAGE TOTAL MONTHLY VALUE**

\$45.15

[How is this calculated?](#)

Receive added protection on all your purchases too.

RETURN GUARANTEE: Get a refund when you purchase something you regret and the store won't take it back. (Limit two items per year.)

PRICE PROTECTION: Get a refund if the price goes down on an item you purchase and the retailer won't pay the difference. (Limit two items per year.)

WARRANTY EXTENSION: Extend the original warranty up to five years from the date of purchase on any eligible item.

ENROLL NOW!

Checking Account Holders:

Log in to Online Banking then:

[Log In To Online Banking](#)

1. Go to "Manage Features"

2. Select the "Plans" page

3. Select your Plan(s) and Enroll

Don't have a Checking Account? Open one now.

In branch: Zip Code:

By phone: 1-877-360-2472

Online: [Select & Open a Checking Account](#)

30 DAYS AT NO CHARGE! LEARN MORE

Calculations are based on average savings. Actual savings may vary. Purchase Protection benefits and Grocery Coupon savings are not included in any of the calculations.

[In the Community](#) | [About Us](#) | [Careers](#) | [Branch/ATM Locator](#)

[Member FDIC](#) | [Equal Housing Lender](#) | [Site Map](#) | [Security & Privacy & Legal](#)

* You will see your first deduction in 60 days, otherwise, you will see it in 30 days.

PLANS DISCLOSURE: All benefits, with the exception of the GreenSense benefit, are provided by The CPP Insurance Agency, LLC, which will be referred to as "CPP", or CPP's third party providers. Citizens Bank is not an affiliate of nor is it responsible or liable for the services provided by CPP.

CITIZENS BANK: PERSONAL CHECKING PRODUCT PLANS (2012)

Value Plan (with user inputs depicting total value and average comparisons)



[Personal](#)
[Small Business](#)
[Commercial](#)
[Investing](#)
[Customer Service](#)
[Open an Account](#)

[Checking](#)
[Savings, Money Markets, & CDs](#)
[Borrowing Options](#)
[Students](#)
[Credit Cards](#)
[MoneyHelp®](#)
[Online & Mobile Banking](#)

Value Plan: \$6.99
Secure Plan: \$6.99
Combined Plan: \$10.99
BEST VALUE

Watch your money add up with our Value Plan. [Watch Overview Video](#) [Plan Benefit Details](#)

MONTHLY VALUE
YOUR TOTAL MONTHLY VALUE **\$113.27**
AVERAGE TOTAL MONTHLY VALUE **\$45.15**

How many times **PER WEEK** do you do the following?

| | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------|
|  Debit Card Purchases and Online Bill Payments Learn How It Works | <input type="text" value="0"/> <input type="text" value="1 to 6"/> <input type="text" value="7 to 12"/> <input checked="" type="text" value="13 to 18"/> <input type="text" value="19 to 24"/> <input type="text" value="25+"/> | \$6.20 earnings | \$3.60 earnings |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------|

How many times **PER MONTH** do you do the following?

| | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------|
|  Dine Out at Restaurants Learn How It Works | <input type="text" value="0"/> <input type="text" value="1"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/> <input checked="" type="text" value="5+"/> | \$50.00 savings | \$12.50 savings |
|  Shop for Clothes, Electronics, etc. Learn How It Works | <input type="text" value="0"/> <input type="text" value="1"/> <input type="text" value="2"/> <input checked="" type="text" value="3"/> <input type="text" value="4"/> <input type="text" value="5+"/> | \$24.39 savings | \$2.70 savings |
|  Entertainment, Events and Attractions Learn How It Works | <input type="text" value="0"/> <input type="text" value="1"/> <input checked="" type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/> <input type="text" value="5+"/> | \$26.50 savings | \$6.60 savings |

How many times **PER YEAR** do you do the following?

| | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------|
|  Travel, Vacations and Getaways Learn How It Works | <input type="text" value="0"/> <input type="text" value="1"/> <input checked="" type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="4"/> <input type="text" value="5+"/> | \$13.17 savings | \$19.75 savings |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------|

DEBIT CARD AND ONLINE BILL PAY **\$6.20**
+
SAVINGS **\$114.06**
-
PLAN COST **\$6.99**
=
YOUR TOTAL MONTHLY VALUE **\$113.27**
AVERAGE TOTAL MONTHLY VALUE **\$45.15**

[How is this calculated?](#)

Receive added protection on all your purchases too.

| | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| RETURN GUARANTEE: Get a refund when you purchase something you regret and the store won't take it back. (Limit two items per year.) | PRICE PROTECTION: Get a refund if the price goes down on an item you purchase and the retailer won't pay the difference. (Limit two items per year.) | WARRANTY EXTENSION: Extend the original warranty up to five years from the date of purchase on any eligible item. |
|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|

ENROLL NOW!

Checking Account Holders:

Log in to Online Banking then:
[Log In To Online Banking](#)

1. Go to "Manage Features"
2. Select the "Plans" page
3. Select your Plan(s) and Enroll

Don't have a Checking Account? Open one now.

In branch: Zip Code:
By phone: 1-877-360-2472
Online: [Select & Open a Checking Account](#)

30 DAYS AT NO CHARGE! LEARN MORE

Calculations are based on average savings. Actual savings may vary. Purchase Protection benefits and Grocery Coupon savings are not included in any of the calculations.

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* You will see your first deduction in 60 days, otherwise, you will see it in 30 days.


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CITIZENS BANK: PERSONAL CHECKING PRODUCT PLANS (2012)

Secure Plan (with user inputs depicting level of protection)



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[Credit Cards](#)
[MoneyHelp®](#)
[Online & Mobile Banking](#)





Value Plan: \$6.99

Secure Plan: \$6.99

Combined Plan: \$10.99 **BEST VALUE**

See how the Secure Plan can keep your credit and information protected. [Watch Overview Video](#) [Plan Benefit Details](#)

Do you currently have the following coverages and protection?

| | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Review and Monitor your Credit Learn How It Works | <input checked="" type="radio"/> YES <input type="radio"/> NO <input type="radio"/> NOT SURE | Get notified immediately of any credit report inquiries or changes. Plus, request a tri-bureau credit report if you experience an identity theft or loss. |
|  Internet Surveillance for Personal Data Learn How It Works | <input checked="" type="radio"/> YES <input type="radio"/> NO <input type="radio"/> NOT SURE | Get notified if your personal information has been compromised online. Receive expert help and support if an issue is discovered. |
|  Credit Card and Personal Document Cancellation and Replacement Learn How It Works | <input checked="" type="radio"/> YES <input type="radio"/> NO <input type="radio"/> NOT SURE | If your card or wallet is lost or stolen, a single phone call will initiate the cancellation and replacement of your cards on your behalf. |
|  Access to Fraud Resolution Specialists Learn How It Works | <input checked="" type="radio"/> YES <input type="radio"/> NO <input type="radio"/> NOT SURE | Get immediate assistance from a fraud specialist if you think your personal information may have been compromised. |

Based on your answers, you currently have:

Minimum Coverage

With minimum coverage you should know that the average amount taken from identity theft victims amounts to **\$4,841**. [2]

ENROLL NOW!

Checking Account Holders:

Log in to Online Banking then:

Log In To Online Banking

- Go to "Manage Features"
- Select the "Plans" page
- Select your Plan(s) and Enroll

Don't have a Checking Account? Open one now.

In branch: Zip Code:

By phone: 1-877-360-2472

Online: [Select & Open a Checking Account](#)

[1] <http://www.identitytheftcreditfraud.com/creditcardfraud.htm>

[2] <http://mashable.com/2011/01/29/identity-theft-infographic/>

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You must be 18 years or older, a US resident and have or open a Citizens Bank checking account. Only one plan per account.

Value Plan Discounts: Actual savings may vary. View the [Plans User Guide](#).

GreenSense: Terms, conditions, restrictions apply. Transactions must post to your account to qualify.

All other benefits: Exclusions and limitations apply. See Terms and Conditions for complete product benefit details. The Purchase Protection programs are administered by TWG Innovation Solutions, Inc., 175 West Jackson Blvd, Chicago, IL 60604 (312) 356-3000 via forms ESP-MEM-I-DOP(8.11), PP-MEM-NT (12.07), and SG-MEM-NT (12.07). Warranty Extension benefits are not available in Maine or Utah, and are provided by National Product Care Company, except in Arizona, Florida, Oklahoma and Wisconsin, where they are provided by Service Saver, Incorporated (FL License Number 80173), both of which are located at 175 West Jackson Blvd, Chicago, IL 60604 (312) 356-3000.

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CITIZENS BANK: PERSONAL CHECKING PRODUCT PLANS (2012)

Combined Plan (with collective value and level of protection)

Citizens Bank®
GOOD BANKING IS GOOD CITIZENSHIP™

Search

Personal | Small Business | Commercial | Investing | Customer Service | Open an Account

Checking | Savings, Money Markets, & CDs | Borrowing Options | Students | Credit Cards | MoneyHelp® | Online & Mobile Banking

Value Plan: \$6.99 | Secure Plan: \$6.99 | **Combined Plan: \$10.99** **BEST VALUE**

Watch Overview Video | Plan Benefit Details

Value Plan

The average customer's value per month is: **\$45.15**
[Calculate Your Plan Value](#)

- Discounts and Coupons
- Cash Back with GreenSense®
- Purchase Protection
 - Return Guarantee
 - Price Protection
 - Warranty Extension

How is this calculated?

Average Value Plan Savings:
\$45.15 per month

How much would the Value Plan be worth to you?
Input your data for your estimated value.
[Calculate Your Plan Value](#)

Combined Plan

Just \$10.99 per month — You save over 20%

Secure Plan

Get security that goes beyond the standard coverage.
[Assess Your Security Coverage Level](#)

- Credit Monitoring with TransUnion®
- Internet Surveillance with DataPatrol
- Card and Document Registration
- Fraud Resolution
- Follow-up Credit Report

Security and Protection from
Consumer Fraud and Identity Theft

How much security coverage do you have now?
Input your data for your personalized coverage level.
[Assess Your Security Coverage Level](#)

ENROLL NOW!

Checking Account Holders:

Log in to Online Banking then:

[Log In To Online Banking](#)

- Go to "Manage Features"
- Select the "Plans" page
- Select your Plan(s) and Enroll

Don't have a Checking Account? Open one now.

In branch: Zip Code:

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VeriSign |

SUNGLASS RETAILER: IN-STORE PURCHASING EXPERIENCE (2013)

Client

Leading retailer of designer and high-performance sun eyewear

Initial UX strategy recommendations were made to conduct in-store contextual inquiry and interviews with sales associates. The goal was to observe the sales process and determine the prioritization of user tasks as they relate to customer needs. The client opted to conduct its own in-store interviews and determined business requirements using the existing consumer-facing site.

Industry

Consumer Retail

Provided with this research and marketing insight gained through client stakeholder interviews that I participated in, I provided UX consultation on the in-store experience including:

DESIGN CHALLENGE

Refine the WebSphere Madison eCommerce starter store to accommodate the iPad platform while maintaining 'out-of-the-box' functionality with bare minimum customization.

- : ways to increase customer trust when associates gather private information
- : security recommendations for reducing iPad theft
- : accessibility needs for in-store customers

User Groups

U.S. and Canadian In-store Sales Associates

I then worked with a two-person team to establish a general user task flow and determined an assumed entry point for the iPad. While this is to be developed using website functionality, its primary use is to complete a sale when a customer's preferred product is not available in the store. Therefore, the overall user experience was to look and feel like a customized application to reduce associate time-on-task (currently 15 minutes) and discourage the consumer from purchasing products themselves online.

Deliverable

Create Axure-based wireframe recommendations using existing research and out-of-the-box functionality.

Leveraging the existing WebSphere desktop functionality, taxonomy, and catalog assets, I designed the initial set of wireframes in order for a sales associate to complete a sale by:

- : pulling critical functionality forward – search and navigation categories
- : reducing the content and steps required for guest checkout in order to minimize taps
- : refining terminology to better meet the associate and consumers' mental model for checkout
- : redesigning the layout to accommodate iPad-specific interactions and horizontal / vertical formatting without the use of responsive design

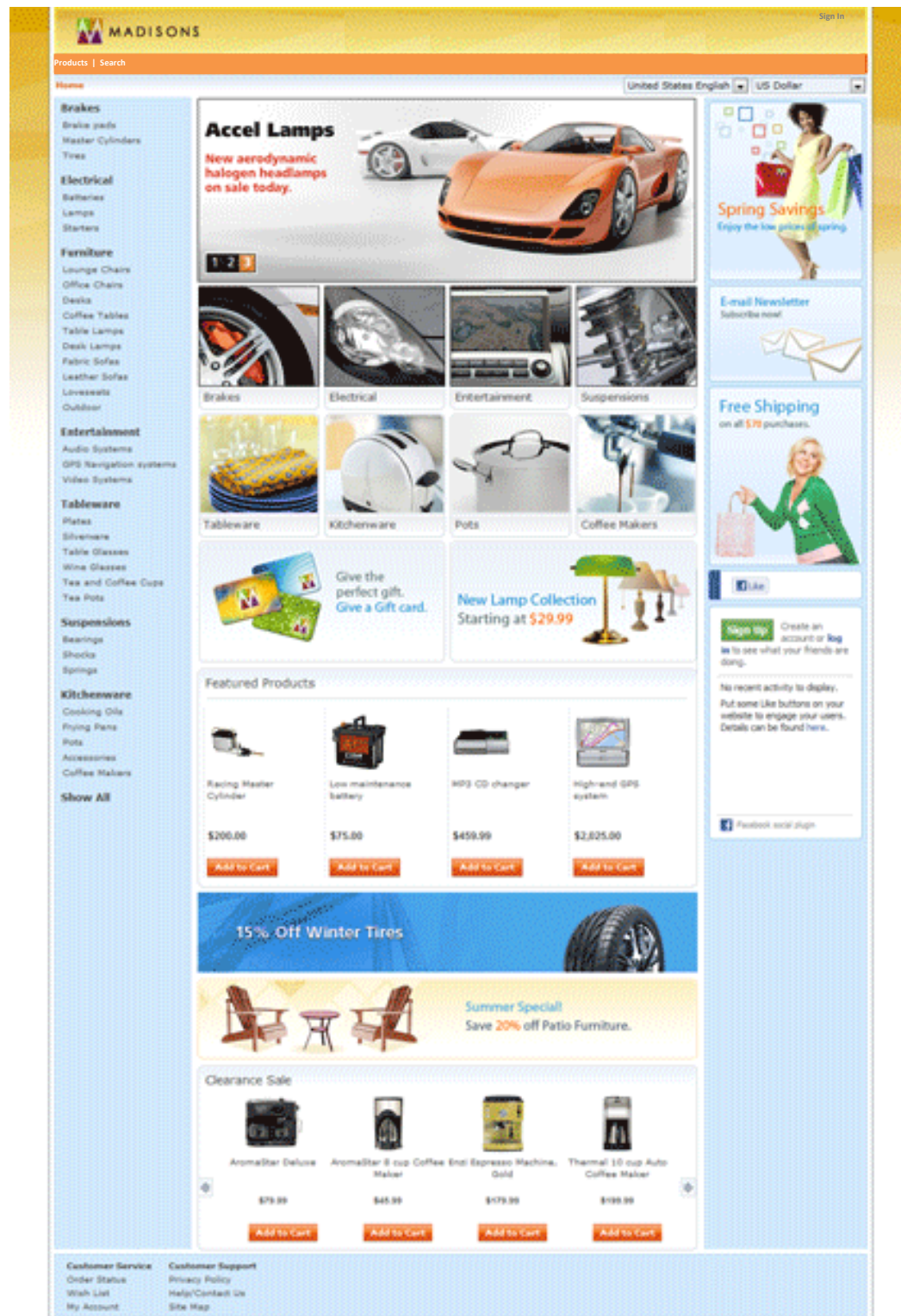
Timeline

2 weeks

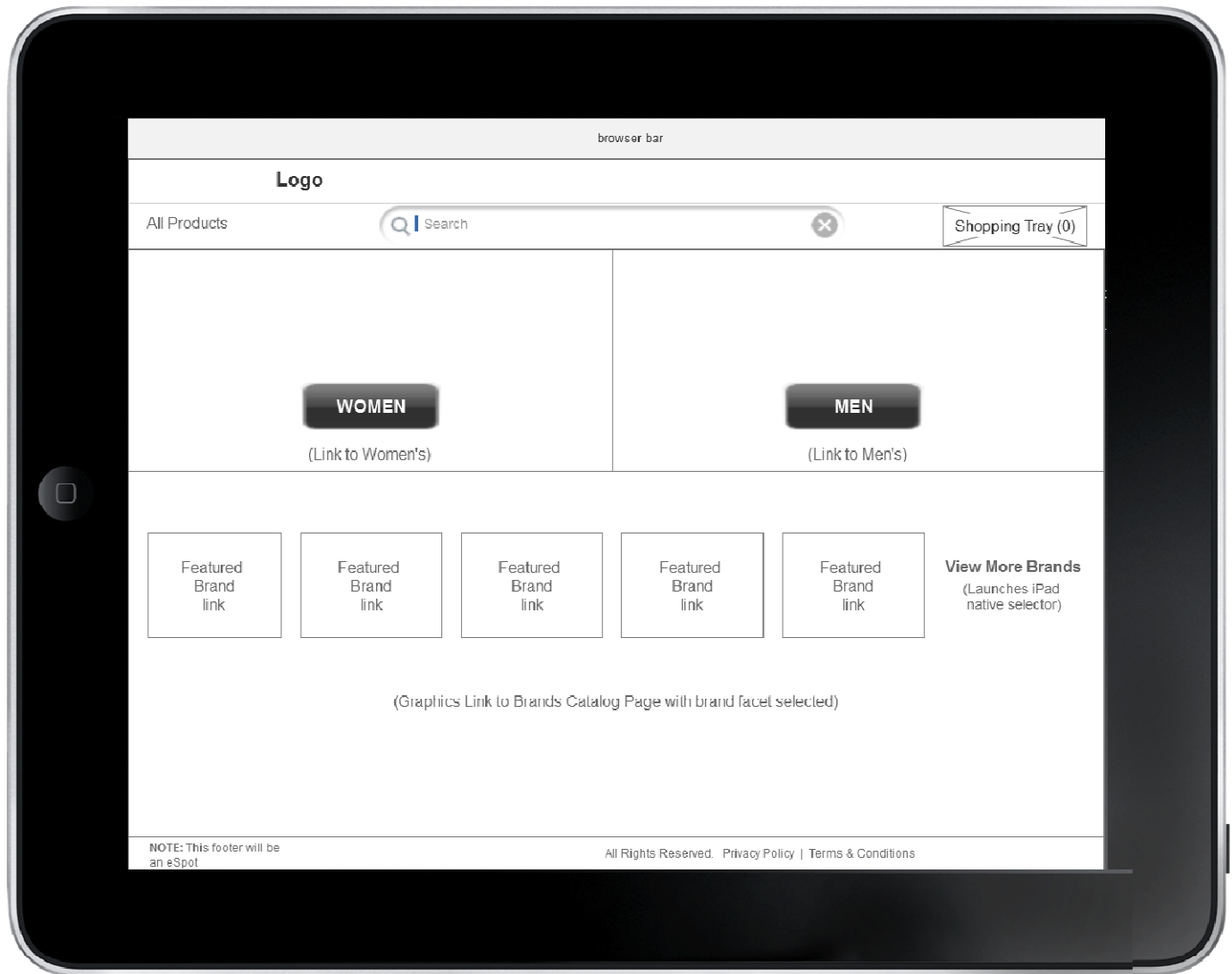
The following pages depict sample screens of the existing out-of-the-box application ('before') and the recommended design in wireframe form.

SUNGLASS RETAILER: IN-STORE PURCHASING EXPERIENCE (2013)

“Before” – WebSphere Out-of-the-Box Home Page

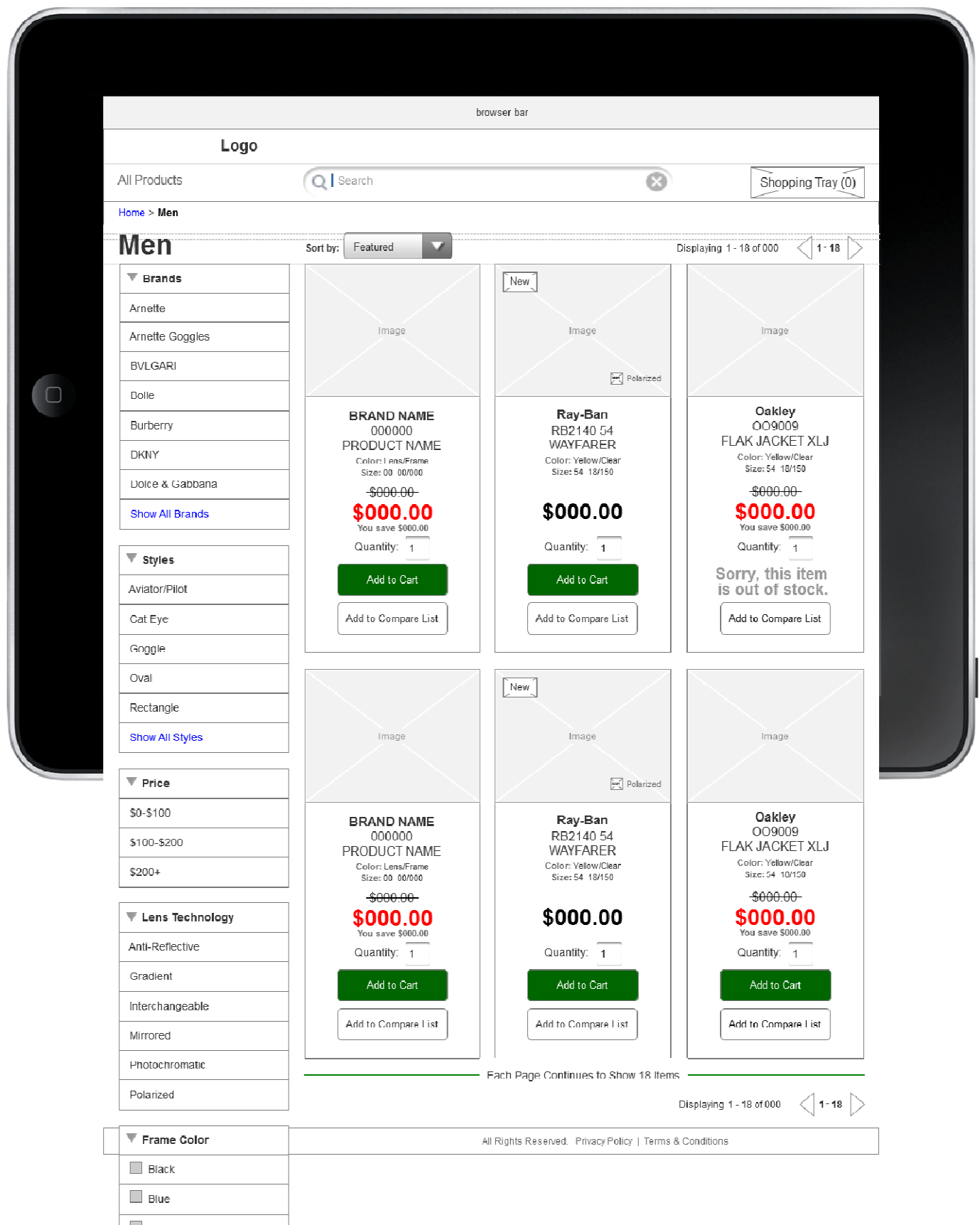


SUNGLASS RETAILER: IN-STORE PURCHASING EXPERIENCE (2013)

Home Page (with large targets for navigation and immediate access to search)

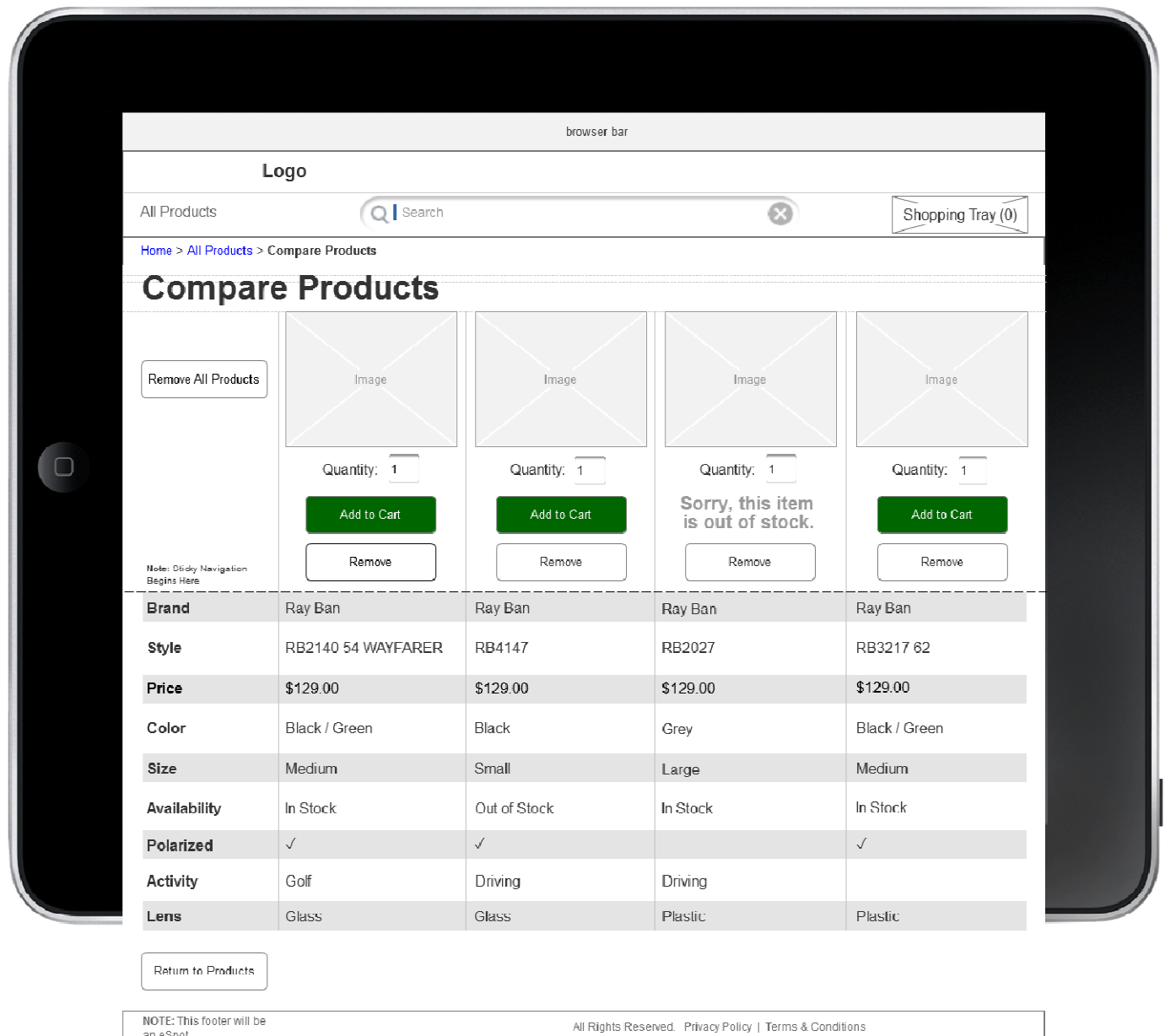
SUNGLASS RETAILER: IN-STORE PURCHASING EXPERIENCE (2013)

Category Landing Page (with larger imagery, removal of 'quick view' feature, immediate add-to-cart functionality, reduced scrolling in left navigation)



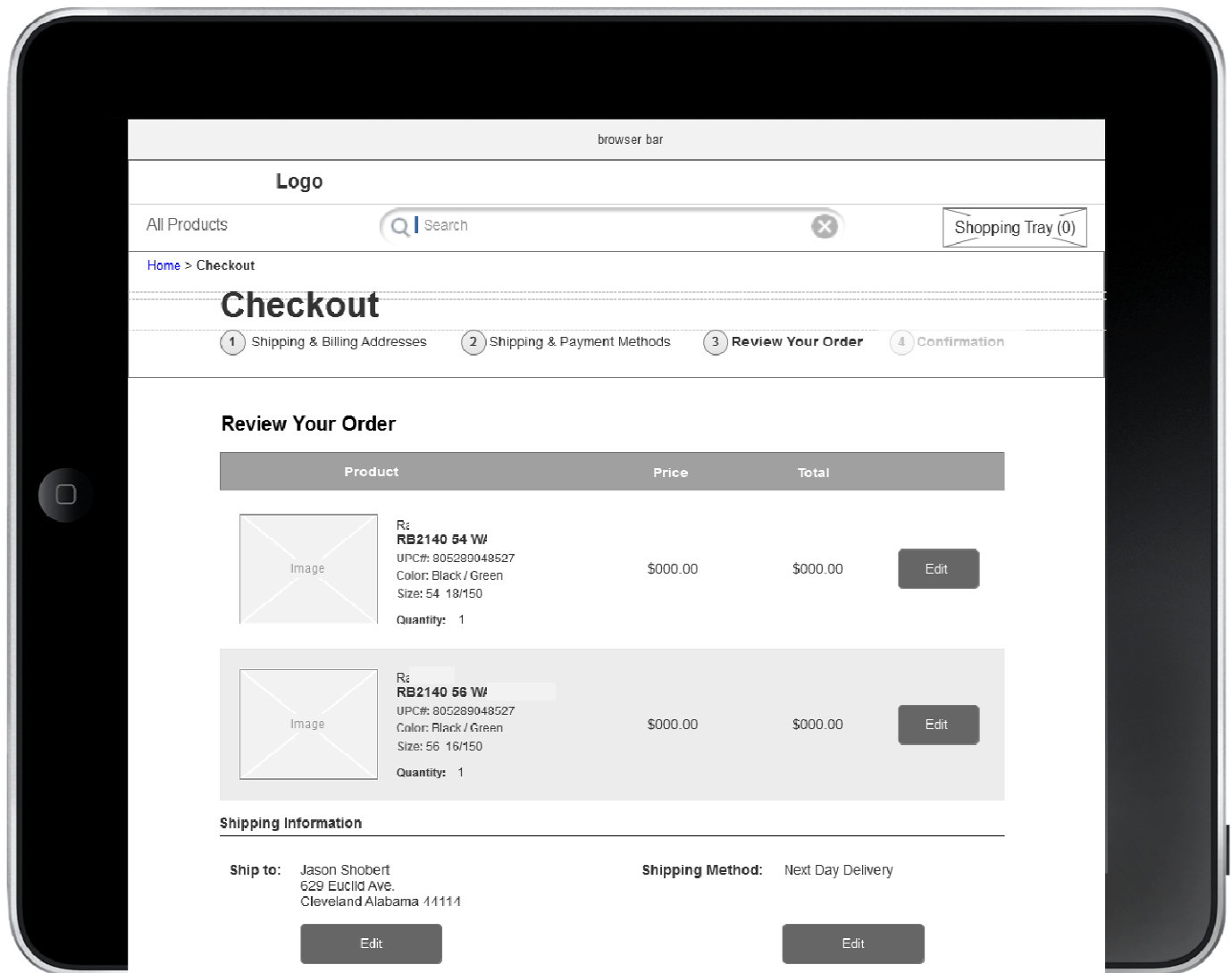
SUNGLASS RETAILER: IN-STORE PURCHASING EXPERIENCE (2013)

Compare Products Page (with larger imagery, immediate add-to-cart functionality, reduced scrolling through sticky navigation, and a side-by-side comparison layout)



SUNGLASS RETAILER: IN-STORE PURCHASING EXPERIENCE (2013)

Checkout Process (simplified layout, larger imagery, more intuitive terminology, and clear presentation of process steps)



CITIZENS BANK: COMPARE PERSONAL CHECKING ACCOUNT PRODUCTS (2012)

Client

Citizens Bank – Personal Banking

As the UX lead to the account, I worked closely with multiple areas of the personal and small business brands. The general strategy that had been taken in the past was to design and develop only two options and determine final use through A/B testing of the site.

Industry

Telecommunications

After several months of working directly with the account team and the client, I was able to persuade them to conduct upfront user research through low-fidelity (paper) prototyping coupled with iterative design usability testing. This was the first time that Citizens Bank engaged in this type of user research. By engaging users, we refined the content structure in the way that users envisioned the information versus the hierarchy that client stakeholders considered important.

DESIGN CHALLENGE

Refine the consumer task flow for comparing checking accounts and increase online account sign-up. The existing work flow was cumbersome and unintuitive forcing users through multiple paths within the site often resulting in page abandonment.

I designed three approaches with the client team in paper wireframe format. Over the course of one week, the concepts were usability tested at Bentley University in Boston and redesigned onsite the following day of each test day (3 test days, 6 users per day). Concepts were combined, narrowed, and retested to arrive at a single layout and content strategy for writing and development.

User Groups

Online banking consumers

The design approach was integrated across both the personal and small business banking areas of the site.

Deliverables


Using Axure, a series of three design approaches were created for iterative design and usability testing. Final deliverables included a refined wireframe set and content structure recommendations.

Timeline

5 weeks

CITIZENS BANK: COMPARE PERSONAL CHECKING ACCOUNT PRODUCTS (2012)

“Before” Checking Accounts Comparison Page



Personal

Small Business

Commercial

Investing

Customer Service

Open an Account

Checking

Savings, Money Markets, & CDs

Borrowing Options

Students

Credit Cards

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Online & Mobile Banking

Personal Banking > Checking Accounts

Checking Accounts

Green Checking

Circle Gold Banking

Student Money Bundle

Plans

Value Plan

Secure Plan

Combined Plan

Managing Your Account

Online Banking

Order Checks

Overdraft Protection

Add a Plan

Debit Cards

Tools & Information

Checking Accounts

Take control of your everyday finances with an easy-to-use and conveniently accessible low fee checking account. Our interest bearing personal checking accounts help you simplify making purchases, automatic deposits, paying bills, transferring funds and more.

Experience the benefits of personal checking account options that meet your needs and fit your lifestyle. Open a bank account online and find helpful account features that can help you:

- Access your account online, at over 1,400 branches, or any one of our 3,600 ATMs
- Get account and payment alerts sent right to your email or mobile device, pay bills online in just minutes, and go paperless with convenient eStatements. Learn more about our [online bank checking account](#) features today

Also, rest assured that your deposits with us are FDIC Insurance¹ protected.

View standard features for all accounts

Compare All Personal Checking Accounts

| Regular Checking | Features | Free Checks |
|-------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|-------------|
| Green Checking Learn more Open now | Low Fee checking account with a low minimum balance, plus so much more. | No |
| Interest Checking | Features | Free Checks |
| Circle Gold Checking with Interest Learn more Open now | Our premier banking package, with preferred rates on savings and borrowing, plus rewards and special perks. | Yes |
| Personal Checking with Interest Learn more Open now | An interest-earning checking account that provides convenient banking access anytime. | No |

Personal Banking Products:

- [Savings Accounts](#)
- [Money Market Accounts](#)
- [Certificates of Deposit \(CDs\)](#)
- [Mortgage/Home Loans](#)
- [Home Equity Loans/Lines of Credit](#)

- [Credit/Debit Cards](#)
- [Student Loans](#)
- [Student Banking](#)
- [Online Banking](#)

¹See a banker for details and FDIC insurance limitations

PLANS DISCLOSURE

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[View Secure Plan Terms and Conditions](#)
[View Combined Plan Terms and Conditions](#)

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Value Plan Discounts: Actual savings may vary.

GreenSense: Terms, conditions, restrictions apply. Transactions must post to your account to qualify.


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Branch/ATM Locator

Over 1,300 branches close by.

Contact Information

[We'll Contact You](#)
1-888-574-0600


[Need Assistance?](#)
[Chat now with a specialist](#)

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All accounts and services are subject to individual approval. See a banker for details on FDIC insurance.

Other fees may apply.

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CITIZENS BANK: COMPARE PERSONAL CHECKING ACCOUNT PRODUCTS (2012)

New Checking Accounts Comparison Page

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[Personal Banking > Checking Accounts](#)

[Checking Accounts](#)

- Green Checking
- Circle Gold Banking
- Interest Checking

[Managing Your Account](#)

- Online Banking
- Order Checks
- eStatements
- Overdraft Choices
- Direct Deposit
- Debit Cards
- Tools & Information

Checking FROM A BASIC ACCOUNT TO INTEREST EARNING. We'll help guide you to the right account.

Compare Checking Accounts

Good banking starts by making your everyday banking easier, more convenient, and even more rewarding. Take a look at the great checking account options below. It's easy to compare to see which solution is right for your life.

[Print](#)

Green Checking

Open Account

Learn More

Personal Checking with Interest

Open Account

Learn More

Circle Gold Checking with Interest®

Open Account

Learn More

Choose Your Account:

An affordable checking account that's a great value and offers easy access to your money – online, mobile, ATMs and more.

An interest-earning checking account that provides convenient banking access anytime.

A premium checking and savings account that rewards you with special discounts, preferred rates, dedicated customer support, four non-Citizens Bank ATM transactions at no charge per statement period¹, and more².

Standard Account Features

- Unlimited monthly transactions and check writing
- 24/7 Online Banking, Mobile Banking and Phone Banking
- Optional Overdraft Protection from Savings or an Overdraft Protection Line of Credit³
- Steady Save® automatic transfers to your savings account

- Over 1,300 branches including supermarket branches with select locations open seven days a week
- 3,500+ ATMs from Maine to Florida
- Peace of mind with FDIC insurance

Additional Benefits

- Four non-Citizens Bank ATM transactions at no charge per statement period¹
- Rate discounts
- Fee discounts
- Additional accounts with no monthly fee³

Minimum Balance to Open

\$50

\$50

\$250

Monthly Maintenance Fee

\$9.99

\$11.99

\$20.00

How to Waive Monthly Maintenance Fee

Make five qualifying payments per statement period including ATM withdrawals, payments using our Online Banking service, Debit Card purchases, checks paid, and automatic electronic payments to a third party.

-OR-

Keep a \$1,500 average daily balance.

Make five qualifying payments per statement period including ATM withdrawals, payments using our Online Banking service, Debit Card purchases, checks paid, and automatic electronic payments to a third party.

-OR-

Keep a \$2,500 average daily balance.

Keep a \$20,000 monthly combined balance, eligible balances include most deposit, loan and investment accounts monthly combined balance. Eligible balances include Circle Gold Savings included with your account, optional Circle Gold Money Market, plus most deposit, loan and investment accounts over all your Citizens Bank accounts

Interest Rates

View Rates

View Rates

Complimentary Checks

✓

✓

✓
[Details](#)

Savings Overdraft Protection⁴ and Overdraft Protection Line of Credit⁵

✓

✓

✓
Annual Fee Waived for Savings Overdraft Protection and Overdraft Protection Line of Credit

Open Account

Open Account

Open Account

1. Four surcharge-free non-Citizens Bank ATM transactions per statement period, after that it is a \$3 charge per transaction.

2. Fee discounts include waiver of Sustained Overdraft Fees and annual fees for Savings Overdraft Protection and Overdraft Protection Line of Credit. No fee standard American Express® travelers Cheques. 15% discount on safe deposit rental.

3. Link to multiple Circle Gold Checking, Circle Gold Savings and Circle Gold Money Market accounts with no additional monthly maintenance fees.

4. \$30 Annual Fee

5. \$30 Annual Fee, \$10 Transfer Fee each day a transfer occurs, plus interest on outstanding balances.

Avoid unexpected fees.

Learn how your account works and about Overdraft Choices

Learn More

Our Android™ app is here!

Now available in Google Play™.

Mobile Banking

Learn more

We're about successful homeownership.

Citizens for Homes.

Home Borrowing

Learn more

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NEW YORK-BASED GROCERY CHAIN: NEW CLIENT PROPOSAL (2013)

Client

New York-based grocery chain

Working with a small business development team, I brainstormed concepts and researched technologies that could be applied to the retailer's business.

Industry

Consumer Retail

Concepts included:

DESIGN CHALLENGE

The client was looking for a new interactive agency to recommend and launch new best-in-class services.

User Groups

Online consumers

Deliverables

Single Axure wireframe depicting possible future offerings.

Timeline

1 week

- : **Recipes and Meals.** Using the Kit and Bundling SKU features available in IBM WebSphere, create recipes and meals that could be grouped together allowing the shopper to add individual ingredients to their shopping list or online cart. Recipes could be 'reshuffled' by the user – either using the mobile app or the site – to create new meal suggestions.
- : **Store "Traffic Reports."** Using geo-fencing technology or recorded entry-way use, the number of shoppers in a store could be determined at any given time. This data could then be presented to shoppers via the mobile app or site. Through historical analysis, shoppers could be given a suggested time when the store is expected to be less busy. This would allow the store's specialty employees (their cheesemonger, wine steward, butcher, etc.) to be more readily available to provide more personalized service – a key brand goal.
- : **List Mapping to Store Layouts.** Assuming most users add items to their shopping list by recipes, as they remember needs, or by specific rooms in their house, lists are generally not prioritized to match a store's layout – produce, dry goods, pharmacy, etc. Users could reorder their lists to map to a store's layout and save their preferred store in their profile.
- : **My Current Pantry.** Using the mobile app, users could scan the bar codes of items already in their pantry and find recipes and meals that could be made using existing ingredients. As well, users could add to their shopping list or cart any remaining items needed to create a new recipe.
- : **Personalized Profiles.** As a user shops, create a profile for them based on possible dietary needs such as gluten-free, vegan, and food allergies. Users could confirm system assumptions as well as build upon their profile to include additional personal attributes such as "weekend foodie," "cheese lover," "guerilla gourmet," etc. This allowed the site to provide alerts, recommendations, recipes and more based on their household size, level of expertise, and sense of adventure in trying new foods.
- : **In-Store Scanning.** Using the mobile app, users could scan a product's bar code or fresh ingredient QR code to view related allergy alerts, source of origin, and recipe / meal suggestions. The user could then add the item to their shopping list to buy later or if purchased, the item could then be added to their Current Pantry and My Products.
- : **Food Adventures.** The site could provide customers with weekly meal suggestions tailored to meet their profile settings and offer them a chance to discover new culinary options – Breakfast in Japan, BBQ'ing in Brazil, Movie Night, and Theme Parties.
- : **Cooking Challenges.** Customers could participate in key ingredient challenges with a countdown to final entry time. Users could upload their own recipes and photos. Winning recipes could then be featured and added to the overall database of ingredients, recipes and meals. Other users could participate through reviews, additions/adjustments to recipes and social media postings.

I created the following single wireframe to depict the integration of the concepts on the site's home page for a walk-through with the potential client.

NEW YORK-BASED GROCERY CHAIN: NEW CLIENT PROPOSAL (2013)

Conceptual Home Page

Market Logo

Search products, recipes, events...

My Account | Sign Out

Brooklyn New Utrecht [Edit My Store](#)

All Products | Shop by Room | My Products | Recipes & Meals | Store Locator

(12 items) \$38.98
Just \$41.02 away from Free Shipping!

This Week's Taste of Italy

(FOOD IMAGERY)

Amazing Meals
☐ Breakfast ☐ Lunch ☐ Dinner

Include:
☒ Gluten-Free ☐ Wine Pairings ☒ Adventures
☒ Lactose-Free ☒ Grilling Options

View Recipes

☒ This Week's Taste of Italy ☐ Food Challenge Countdown! ☐ Fall Wine Tasting Event [MORE >](#)

Princess Cruises Culinary Cruise to ITALY

Featuring Rising Star Chef **Angelo Romano** of Brooklyn's Own

Reserve your space now!

Let's Cruise

Great Deals on Your Products

Instant Coupon

Product Name

Product Name

Product Name

Instant Coupon

Product Name

Product Name

Download Our Mobile App

Check Store Traffic
Find out when the best time to shop and avoid the crowds.

Scan Your Pantry
Find great recipes and meal suggestions using what you already have at home.

Rearrange Your List to Match Your Store's Layout
Find out if a product's ingredient list has changed.

Get In-Store Advice
Scan a product's bar code or fresh ingredient QR code to view related allergy alerts, source of origin, and recipe / meal suggestions. Even save an item for later.

Tia Keenan

This Week's Wine Pairings

Product Name

~~\$60.00~~ **\$00.00**

Quantity:

Add to Cart

Add to My List

Load More

VISA

MasterCard

Cirrus

Discover

PayPal

Customer Service

Help & FAQs

Store Locations & Hours

Email: support@market.com

1-800-000-0000

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