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# PORTFOLIO

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Sophie Henry

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## Case Studies

RMS

Chase 360

KaayaSoft

Chase SWAT

Alibris

## Skills

Research

UX and IA

Planning & Directing

## Leadership

Publications

Teaching

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WORK

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# RMS

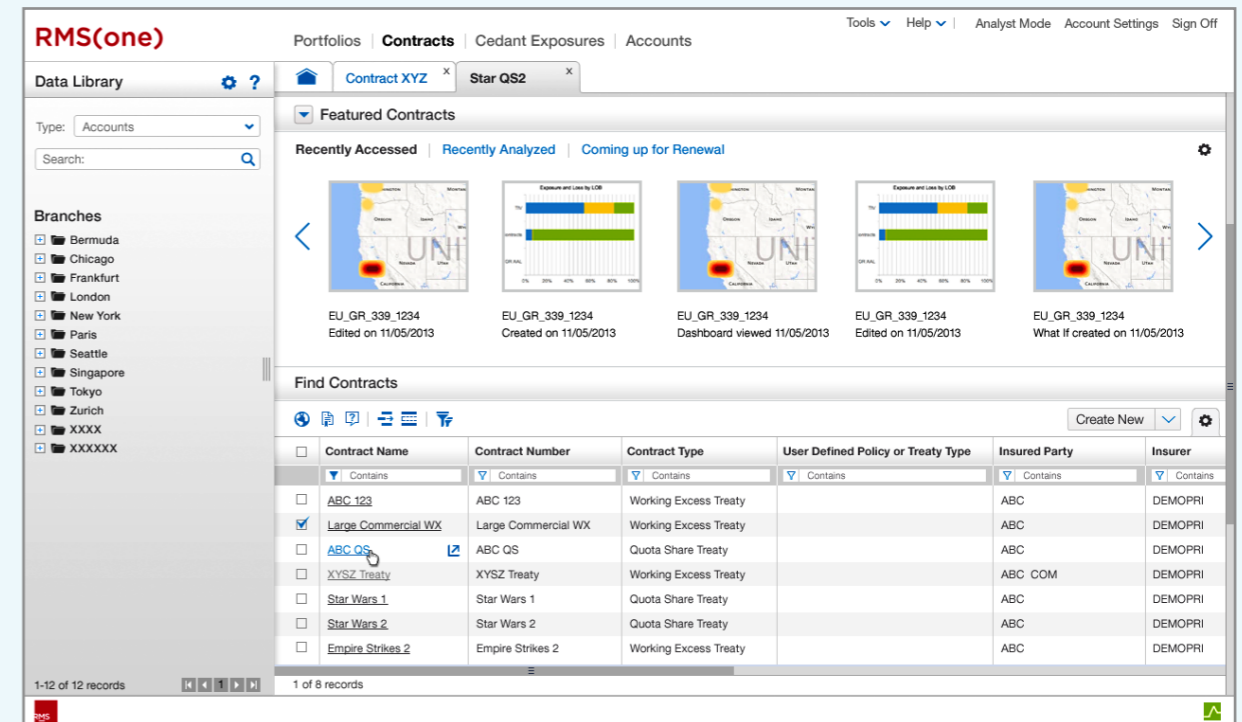
## Redesigning a data-intensive risk-management platform for large insurance companies

RMS is the leader in large catastrophe modeling for the insurance industry. Its main product, the RMS(one) cloud-based platform, supports modelers, analysts and risk managers in making key pricing and investment decisions.

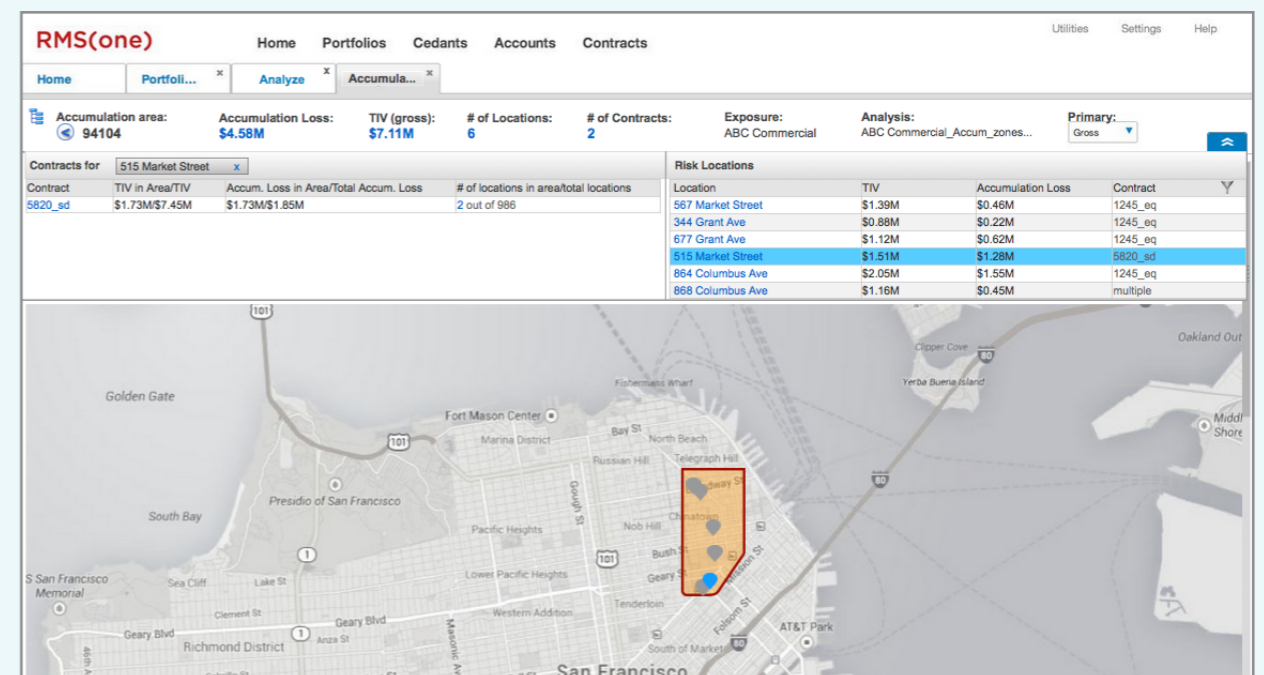
RMS originally wanted only a few key screens to be redesigned to simplify document management tasks. I worked on cleaner page layouts, introducing icons, and improving page-level usability. In parallel, I identified key navigational issues that undermined flow and task completion. Working closely with the VP of product management, I pushed forward a more extensive product and UX strategy plan for the company that addressed these issues and helped prioritize product features from a user-centric perspective.

*What I learned:*

*Careful execution of details makes a good case for tackling tougher UX issues*

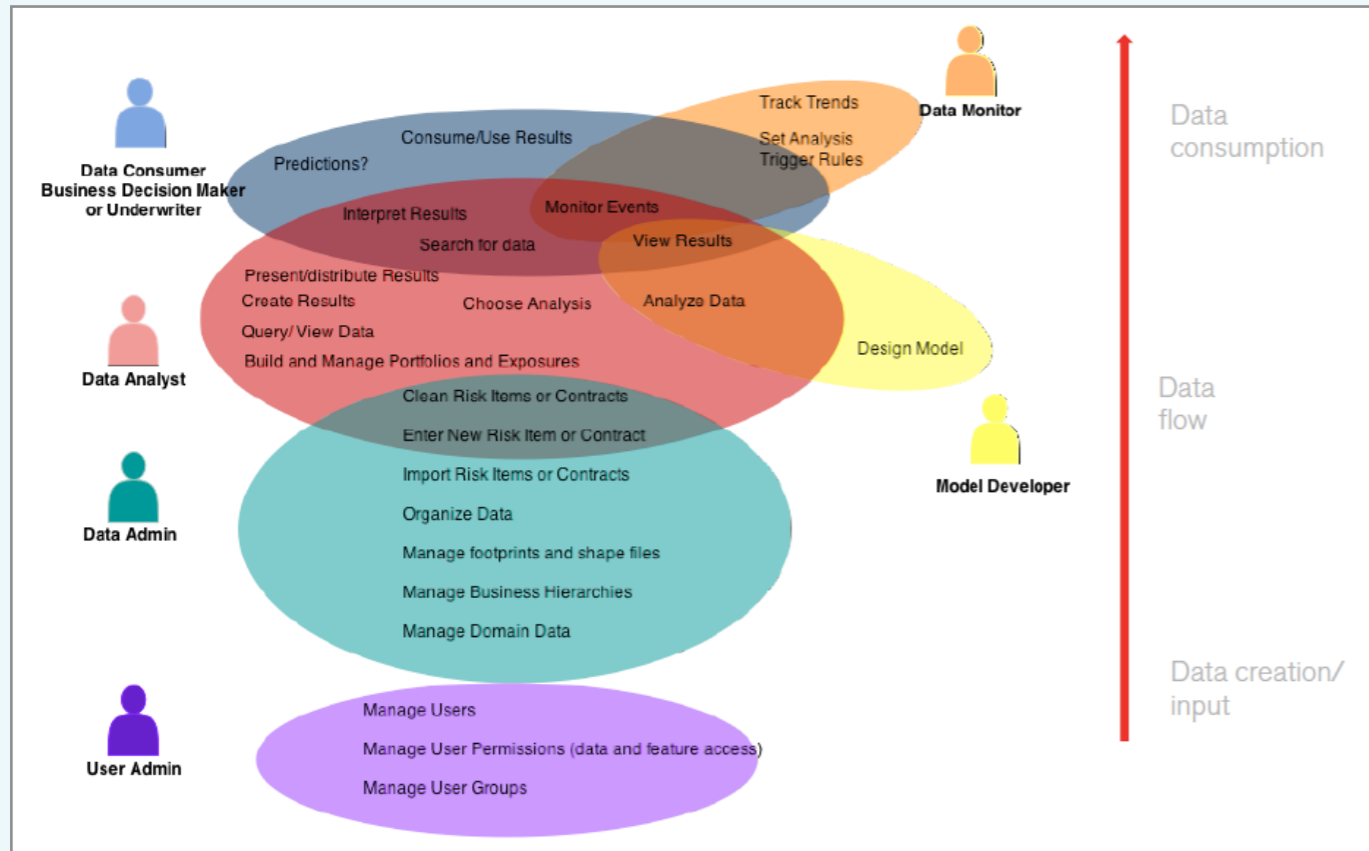


improved layouts and visuals

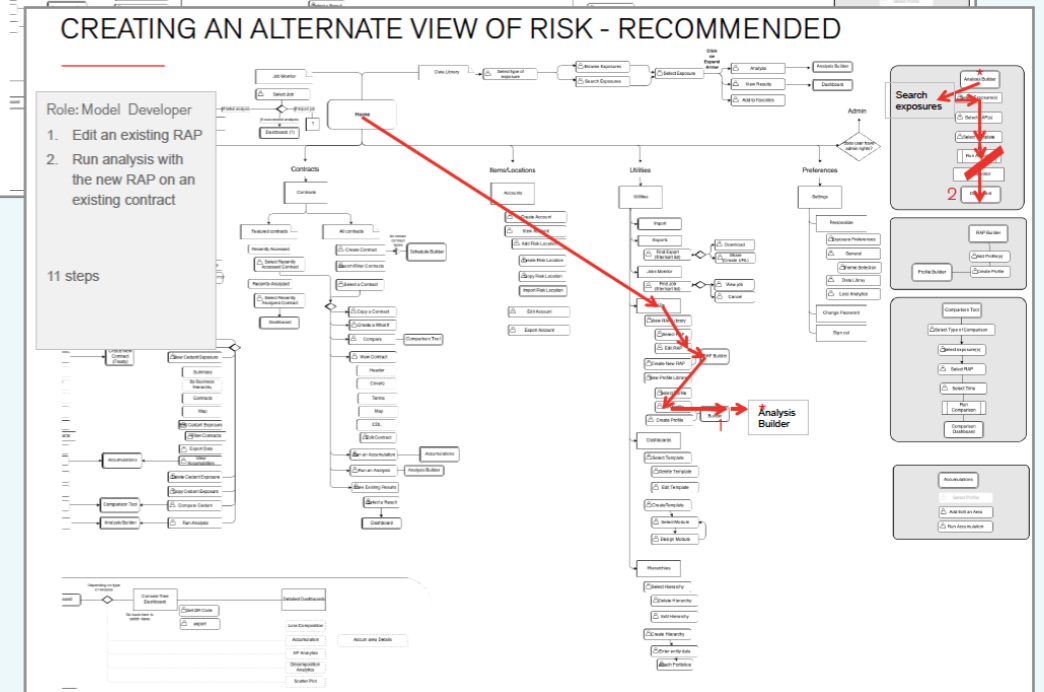
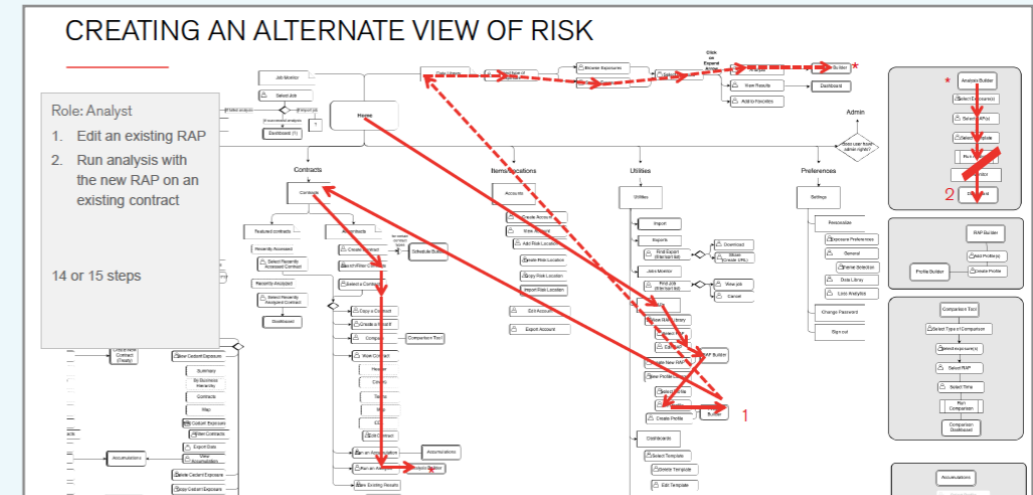


interactive prototypes

# RMS: ADDITIONAL DELIVERABLES



user role/task mapping



flow improvement visualizations

# CHASE 360

Designing a 360 degree view of the customer across lines of business to deliver better customer service

Chase customer service specialists could only view customer information relevant to the line of business that they served. A customer calling to contest a credit card transaction would not be alerted of a late auto loan payment or of an issue on their checking account.

Working with representatives from every line of business at Chase in an Agile process, I led a team of designers to deliver assets needed by business managers and developers to align on features and build the product:

- functional prototypes and wireframes to build consensus and define product requirements
- a visual design system flexible and scalable enough to meet the needs of the Agile development team
- contributions to user stories, UATs, and demos
- a living prototype showing future features (multiple sprints ahead of development) to share product vision with stakeholders

What I learned:

*UX strategy and agile development are not as incompatible as some make it sound as long as you lay a good foundation and stay open to change*

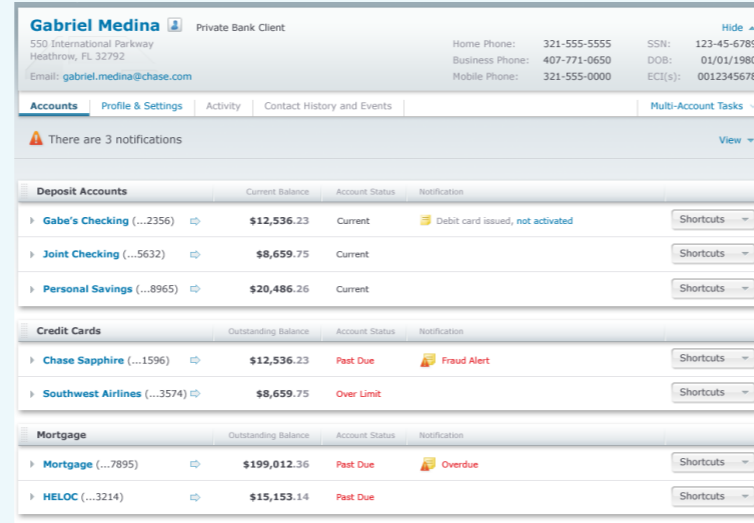
The screenshot displays a comprehensive customer profile for John Greene, an Active Military member in the Air Force. The interface is organized into several sections:

- Customer Information:** Includes name, address (550 INTERNATIONAL PARKWAY, HEATHROW, FL 32792, USA), email (john.greene@chase.com), and various phone numbers (Home, Business, Mobile). It also lists SSN, DOB, and ECI(s).
- Accounts & Settings:** A navigation bar with tabs for 'Accounts', 'Profile & Settings', and 'Contact History'. Below this is a calendar view for July and August, with a legend for 'Call or Visit', 'Alert', and 'Document'. A summary indicates 'Most recent contact: 07/29/12 3:15 ET by phone' and '3 contacts over past 30 days'.
- Alerts:** A section with a red background containing 'Fraud Alert, Chase Sapphire (...1596)', 'Returned Mail/Need Address Change', and 'Payment Received, Chase Savings (...3791)'. A secondary alert for 'Chase Sapphire (...1596)' is also visible.
- Deposit Accounts:** A table listing various accounts:
  - Premier Plus Check...** (Account ID: ...2358): Available Balance \$6,207.31, Open.
  - Primary Joint Owner** (Account ID: 486596492358): Present Balance \$7,526.31, Deposits on Hold \$1,100.00.
  - Chase Savings** (Account ID: ...3971): Available Balance \$25,367.85, Open.
  - Sole Owner** (Account ID: 486596493971): Present Balance \$25,367.85, Deposits on Hold \$0.00.
  - Safe Deposit Box** (Account ID: ...3971): Box Size 03 x 05, Active.
- Credit Cards:** Lists a 'Sapphire Visa (...9904)' with a minimum due of \$25.00 on 08/01, marked as 'Past Due'. It also shows an 'Authorized User' (Account ID: 486596499904) with an outstanding balance of \$2,212.05 and available credit of \$871.00.
- Mortgage:** Details a 'Mortgage 30-Year...' (Account ID: ...3409) with a remaining principal of \$1,138,347.27 and a last payment of \$1,425.50 on 06/01/2012.
- Auto Loans:** Shows a '2005 Toyota Prius (...4456)' with a remaining balance of \$650.52 due on 08/06.

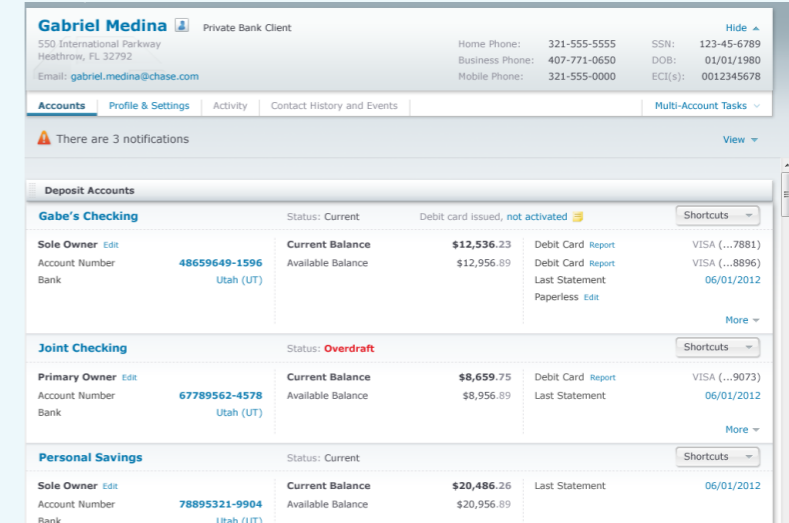
# CHASE 360

Using a living prototype to test the concept with users and to build support among business stakeholders

1. Driving insights from user research, and focusing with the accounts screen, we designed a few options. I ran user tests to select how much information to display and to validate the overall concept of a cross line of business view of customers for specialists.



collapsed rows

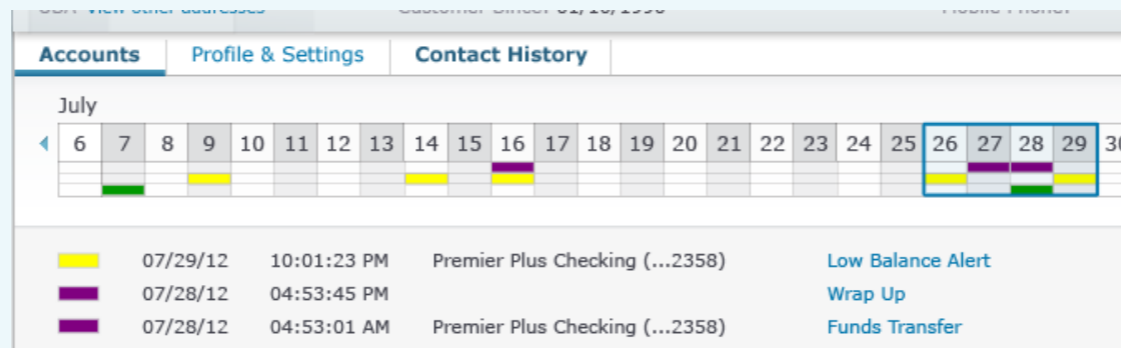


expanded rows

2. Using call center data, we identified and prioritized the information and features to build first. The prototype was updated and used in steering committee meetings to support the business case.

Top Retail call reasons	Answer in summary screen?
Deposits on Hold	Yes
Account Balance / Available Credit	Yes
Debit Card Fraud	Yes
Overdraft Inquiry	Yes
Debit Card Replacement	Yes
Fraud	Yes
Disputes	One click away
Account Info / Terms	One click away
Transaction History	One click away

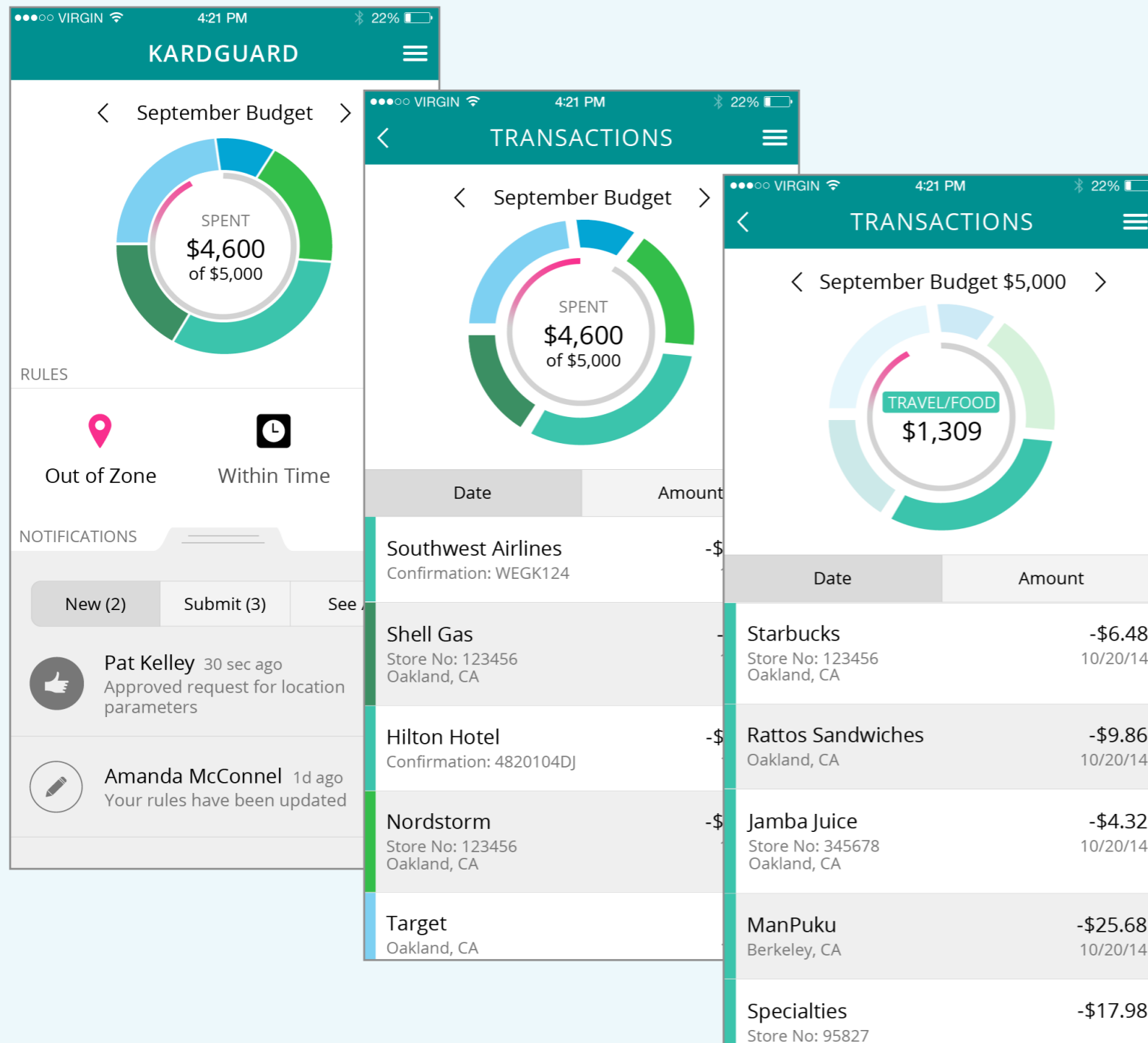
3. In following releases, the most important stories and epics (e.g., seeing the customer's contact history) were added to the prototype, to build alignment among the lines of business and to be tested with users.



<https://projects.invisionapp.com/share/XZF28ABQD>

# KAAYASOFT

## Partnering with a startup to design their first product



There is a lot riding on the quality and usability of the user interface of a startup's first product. Making sure the user experience is self-explanatory and sets itself apart from competition is of foremost importance. Working closely with the CEO and Product Marketing Manager of KaayaSoft, as well as with front-end developers, we refined requirements, helped simplify flows and features, and provided a fresh visual design for the KardGuard MVP.

This project was successful thanks to frequent in-person worksessions with the client and a regular pace of reviews with a small independent team of designers working in tight collaboration.

### *What I learned:*

*How to promote collaboration and provide direction without being part of every discussion and instead choosing when to intervene and bring the team together*



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# CHASE SWAT

## Designing and validating a new design system for a large financial institution

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When Chase decided to refresh the design of their public and secure websites, they brought in Comrade as a design partner to support their internal team. As UX director at Comrade, I led a large team of designers and researchers to deliver in the following areas:

### Research

- Summary analysis of 6 different research studies including a learnability study, focus groups and a benchmarking usability test against top competitors and the existing design
- Development of executive presentations highlighting key findings of these studies
- Creation of a searchable database of results, easily accessible and usable by Chase internal researchers

### Content

- Content audit of the existing [chase.com](https://www.chase.com) properties: over 6000 pages were reviewed to identify content that needed to be rewritten or removed.

### Visual and Interaction Design

- Visual design of the public site product and category pages
- Contribution to the visual design of the secure site for Credit cards and brokerage accounts Content
- UX design of transactions and settings sections of the secure site
- Application of the new visual and interaction design patterns to a number of other sections of the sites
- Bank teller tablet prototype design

*What I learned: how to assemble, ramp up and manage a 14-people team on a complex project within a few weeks*

# CHASE SWAT: ADDITIONAL DELIVERABLES

Personal | Business | Commercial Viewing info for ZIP code 94609 | Find a Branch or ATM | Contact Us | En Español

**CHASE**

Products & Services > **Checking** Why Chase? Log in or Enroll

Turn "ATM" into  
**"A Time-saving Machine"**  
 with CHASE DEPOSITFRIENDLY ATMS<sup>SM</sup> [Learn More](#)

Chase Checking Accounts | **Why Chase Checking Accounts?** | Compare Chase Checking Accounts

## GIVING YOU MORE

Checking is just the beginning

Every Chase checking account is backed by our commitment to convenience and customer service, account security, and even includes Chase Exclusives<sup>SM</sup>. By choosing a Chase checking account you'll experience:

- **More ways to bank** in the branch, online or by phone. Plus, 24/7 customer service by phone is always available.
- **Added protection** with our Zero Liability feature where you're not responsible for unauthorized debit-card transactions (when reported promptly), Real-time Fraud Monitoring, and our online banking guarantee for online bill pay and transfer services.
- **Special benefits** for being a Chase checking account customer through Chase Exclusives.

Experience the value of Chase checking

Chase Exclusives offers you access to better rates, more rewards and bigger discounts—just for being a Chase checking customer. We offer you better rates on CDs, car loans and mortgages, plus you can earn extra rewards on the Chase Freedom<sup>SM</sup> credit card.





**24/7 Access**

Manage your account 24/7 online or from your smartphone. Online Banking is free and gives you access to Online Bill Pay<sup>1</sup>, Account Alerts<sup>2</sup>, and Mobile Banking<sup>3</sup>. Plus, you can get the Chase Mobile<sup>®</sup> App.



**Deposits by phone**

With Chase QuickDeposit<sup>SM</sup>, you can use your smartphone to make deposits, just by photographing the front and back of your endorsed check.



**Pay your pals**

Pay a friend—without writing a check. With Chase QuickPay<sup>SM</sup>, all you need is their email address or mobile number.

public site: category page

Personal | Business | Commercial Find a Branch or ATM | Contact Us | En Español | Log Out

**CHASE**

How can we help you today?

Hi Susan, welcome back.

Net balance based on 5 accounts > \$10,872.78

**Checking** (...3872)

Available Balance: **\$142.00**

**Freedom Card** (...2233)

Your Current Balance is **\$1,948.19** Credit limit: **\$5,000**  
You have **\$3,051.81** left to spend

The balance on your **March 15, 2011** statement was **\$1,215.54** Autopay is on  
Your autopay is set to pay on April 15 [Send a Payment](#)

**Ultimate Rewards**

**UR** **ultimate rewards** **5% Cash Back** (enrolled)  
Rewards Balance 15,100 pts or \$151 cash-back

[Recent Activity](#)  
[Statements](#)  
[Account Details](#)

**Ink Bold** (...2385)

Current Balance: **\$1,359.84**

**Ink Bold Emp**

Current Balance: **\$13,1**

**Chase Slate Card** (...4583)

Outstanding Balance: **\$487.56**

**Savings Plans** (3)

**Ecuador Vacation**

Target **\$3,800**

Current **\$2,560**

Next Contribution **July 2, 2011**

[Add a New Account](#)

secure site:  
credit card tile  
design

tablet  
application for  
bank tellers

Find a customer

**Jane Smith & Jeff Smith**  
Primary Account Holder  
Account Summary

Overview | Quick Review | Recent Activity | New Account

There are 2 action items... [Show Action Items](#)

**Premier Checking**

Current Balance: **\$1,851.54**

Next Direct Deposit **\$1,250.00**  
Tuesday, March 15

**Slate Card**

Outstanding Balance: **\$1,948.19**

Statement balance **\$1,215.54** Minimum Payment **\$25.00**

**Premier Checking**

Current Balance: **-\$234.62**

Last Transaction **-\$958.62**  
Overdraft Alert

**Money Market Savings**

Current Balance: **\$12,231.04**

Last Transaction **\$623.60**

**ATM / Debit Card**

Current Balance: **N/A**

[Add a New Account](#)

[ATM Card Maintenance](#) (1) | [Branch-Assisted Online Banking](#) (2) | [Funds Transfer Payments](#) (3)

# ALIBRIS

## Using personas and user research to improve sales at an online book marketplace

Alibris is a leader in the used book marketplace business. The perception the company had about their typical customers - educated collectors of rare books - was at odds with the reality - avid readers of reduced price books.

I interviewed customers and used survey results and website analytics to draw user personas and helped the business prioritize them. I then designed a new search, selection and shopping cart experience that took into account the numerous attributes of book editions. I ran usability testing sessions to evaluate the designs. The usability improvements of the search flow were subsequently validated in A/B testing and led to an increase of 3% in annual sales.

*What I learned:*

*The power of personas: the marketing team embraced the personas I developed, incorporated them in their decision-making, and won the company Halloween costume contest by dressing as them!*

The screenshot shows the Alibris website interface. At the top, there's a navigation bar with categories like Books, Textbooks, Rare Books, Movies, Music, Community, and Sale. A search bar is prominently displayed with the text 'Search by Title, Author, or ISBN'. Below the search bar, the search results for 'The Age of Innocence' are shown. The first result is '1. The Age of Innocence by Edith Wharton', featuring a book cover and a description: 'The return of the beautiful Countess Olenska into the rigidly conventional society of New York sends reverberations throughout the upper reaches of ... More'. The price is listed as C\$1.37, and it's noted as 'New Only from C\$1.37 | Collectible from C\$4.77'. A second result is '2. The age of innocence by Martin Scorsese, Jay Cocks', with a description: 'The complete script of the five-time Academy Award(R) nominated film, with a lengthy introduction with details on the behind-the-scenes production, ... More'. The price is C\$1.37, and it's 'New Only from C\$23.20'. The page also includes a sidebar with filters for Title, Author, Subject or Keyword, Binding, and Publisher. A 'Recommended Copy' section is visible on the right side of each result, showing the book's condition and an 'Add to Cart' button.

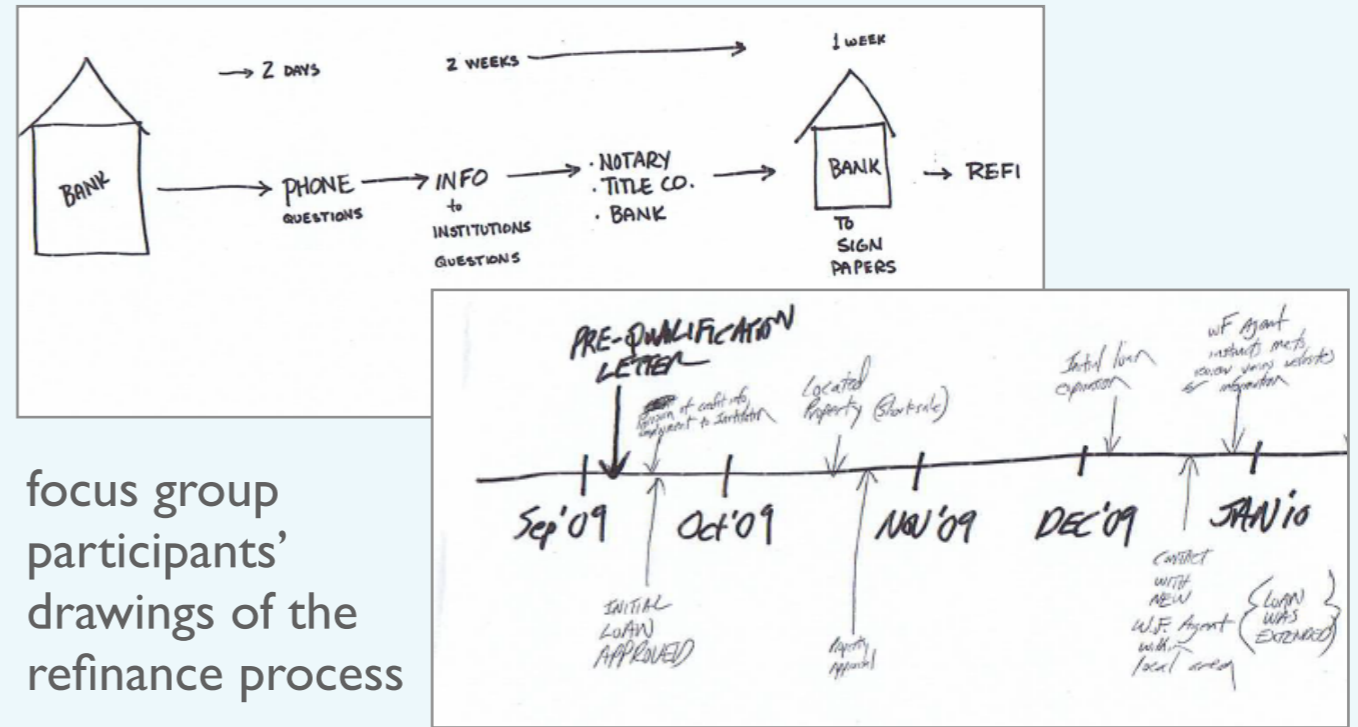
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SKILLS

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# USER RESEARCH

- Prepared and analyzed results of focus groups for multiple projects
- Led contextual inquiries, walkthroughs and one-on-one interviews
- Wrote scripts and managed usability testing on numerous occasions. Moderated usability testing sessions for many projects
- Performed heuristic evaluations and UI critiques
- Conducted competitive analyses
- Led user, client and stakeholder interviews



focus group participants' drawings of the refinance process

Summary of where usability issues were found and their severity for POPMoney.com

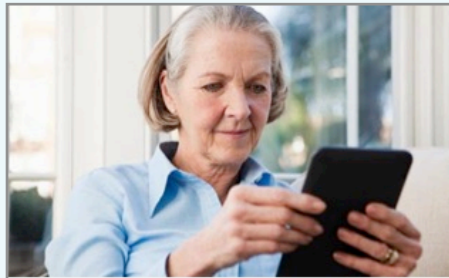
	Deposit Process									OVERALL
	Email	Text	Home	Start Deposit	Deposit Step 1	Deposit Step 2	Deposit Step 3	Registration & Login	Global/help	
Inspire trust	1	1		2	2		4	2	1	1
Match real world					4		3	2	1	1
Lead to next step	2		2		2					2
Speak the users' language	3		4						2	2
Meet users' expectations/support context of use			2		2	4				2
Provide help					4				2	2
Give users control						2		2		2
Respect standards			3	4	2	4	4	5	2	2
Prevent errors	3		3		3	4	5	2	4	3
Be consistent			4					5	4	4
Provide system status and feedback				5				4		4
Promote recognition, not recall								4		4

Legend

- 1 - Very Severe: users may not use system successfully.
- 2 - Severe: users may be frustrated.
- 3 - Relatively Severe: users may be annoyed or repeatedly make a mistake.
- 4 - Not severe: users may use the application sub-optimally.
- 5 - Possible Improvement: users can currently easily work around issues.

heuristic evaluation results matrix

# PERSONAS & JOURNEYS



**Attitude towards Online Security:**  
uncomfortable — fine with it

**Purpose of Service:**  
organization — communication

**Silvers**  
**Sally**  
Age: 69  
Location: St Louis, MO  
Occupation: Retired Professor  
Hobby: Knitting, art collecting, antiques, reading. Video chat with the grandkids often on the iPhone they got her. Works part-time at the church.

**Family**  
Married to Sam, a professor as well. They have one kid and a mini-greyhound. She also has two kids with her ex-husband, Bill. Sam has two kids from his previous marriage. Altogether, she has 14 grandchildren she dotes on.

**Wealth & assets**  
Owns home and beach house. She collects art and books and has gathered a little bit of a lot of different kinds of antiques. She has about 12 accounts, including a trust, 529s for the grandchildren, pensions and life insurance. Has an advisor.

**Gets information from**

- Her Advisor (saw me through the divorce), her Doctor, her Pastor
- Church Social Club
- Local paper, News

**Is motivated by**

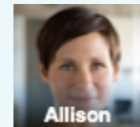
- Ensuring a good life for her grandchildren, yet leaving them more than possessions. She **wants to leave a legacy** that runs deeper.
- Does not want to leave a mess. **She has a plan** and she wants to make sure it is implemented correctly and fairly.
- Sam's **health** scare, her own **sense of being slower**

**Is sensitive to**

- Sharing too much about her wishes, her family is big and relationships can be complicated.
- How advice is given to her. She still **wants to be the one in control**.
- Doing things her own way**. She made it work so far, she just **needs a bit more advice** and help, **not a new way to do things**.

**Thinks & feels**  
My stuff is together, **I am organized**: what else should I do? Is that enough?  
**How can I communicate my decisions** more easily with others?  
After using **DSDB**:  
Relieved and glad others know her plan. "I've done my part". **Peace of mind**.

4



**Journey: Car Buyer considers a AUTO as replacement car (loan at dealership)**

**Allison**

**Goals**  
What is the user trying to accomplish?

**Experience**  
What are the steps?

**Emotions**  
How is the user feeling?

**Thoughts**  
What is the user thinking?

**Discovery**  
I want to know my next car will fit my needs and my values

- I like researching before making a purchase: it saves me time in the long run. Researching new cars becomes an evening project of mine
- I research products and brands online. I look at corporate citizenship and social impact of various car brands
- I use my network of friends, family, and coworkers.
- I do not research finance much in detail. I know I want to get a loan at the dealership
- I narrow down my options to a few models, including a AUTO

**Consideration**  
I want to be dealt with as a person not just as someone with money

- I go to a AUTO dealership by myself. I'll consult with my husband by phone and text
- I make it clear I know I have good credit
- I test drive a few cars
- The dealer gives me information about tax rebates for hybrids that I was not aware of
- I make my choice of the car I want

**Financing Selection**  
I need the process to be as smooth as possible and I trust the dealership to present me the best options

- I ask to trade in my car, and the trade-in value is so low!
- Suddenly the dealer is telling me numbers that seem different and higher than I was told earlier
- I try to get them to bring the numbers down to my expectations. I tell them the terms I'd like
- I try to negotiate but I keep hearing "I can't do that". I don't feel I'm being unreasonable. They know I have good credit
- This whole interaction turns me off and I walk out

**Signing**  
I wanted them to work with me but they wouldn't or couldn't

- I end up walking out very disappointed and without the AUTO
- I go to another brand's dealership and end up getting a car there

*"I want the dealership to treat me as an individual, not just as a person who has money to put out there, and get to know my story."*

**Thoughts**

- I kind of **trust the dealership** and my credit is great. I know I'll get a good rate. I don't need to research financing
- I want to **make sure it's worth it** for me to pay more money for this higher-end type of car and that I will get my money's worth
- I am **confident I can fit this car into my budget**. I handle the family's finances and have a good idea of the monthly payments we can afford

**Thoughts**

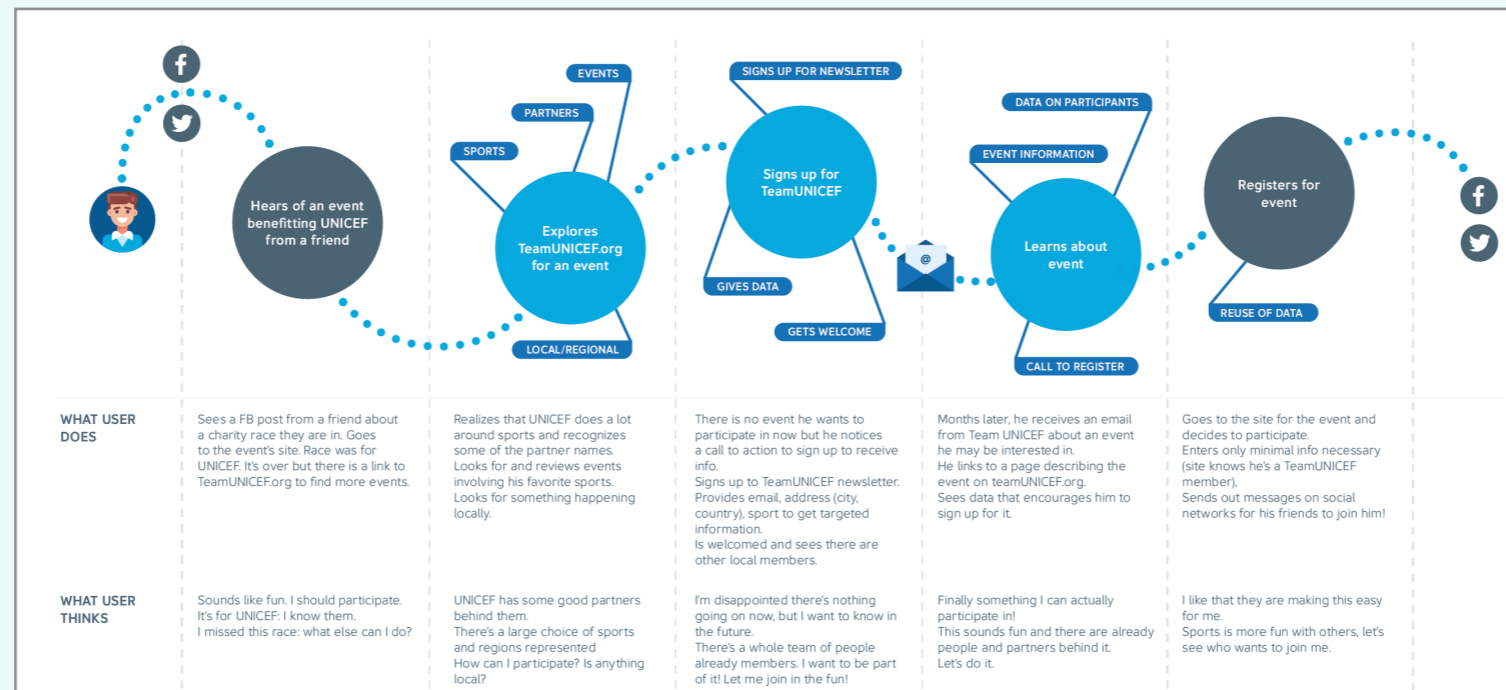
- The AUTO Model A is a higher-end type of car and I can afford it but I'm **concerned they'll treat me like I can't**. I don't know who usually walks into that dealership and my other car-buying experiences were with less expensive brands
- I feel like the people who work at the dealership represent the company and the brand, so I look for **great customer service**. I expect them to stand behind what they sell and to pay attention to my needs
- I feel **comfortable with this sales person**. He seems caring and thoughtful. He shares valuable knowledge

**Thoughts**

- The car I want is a bit more, the trade-in value of my car is less, but I'm financing through the dealership. Can I get something like a lower rate or some % off the car to compensate?
- I keep hearing "I can't" and being given the long sheet of terms. They won't budge on the rate
- I don't like haggling. **This is a waste of my time**. The dealer doesn't seem to be working with me to make it work out
- Why did they **wait so long** to give me a rate? Especially one this high...
- I am **very irritated** about my trade-in value being so low. He should have been clearer when we were looking at the cars if he wasn't sure that the trade-in value would be what I expected!
- I don't feel they are making enough of an effort

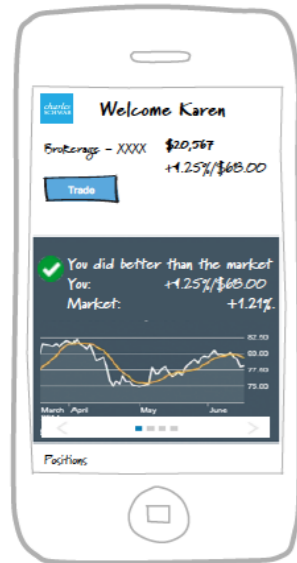
**Thoughts**

- I feel **disappointed**
- I am **frustrated**: this was a waste of time
- They could have done a lot more to try to sell me the car. **I really wanted it!**
- At the other dealership, I realize there were fees and other protection products that could have been part of the negotiation at AUTO that I didn't even think of asking about. I was focused on rate and loan terms, but they could have mentioned more of what was possible
- Looking back, I don't think that the AUTO salesperson was creative enough in meeting my needs

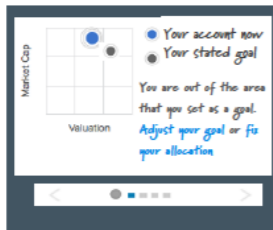


# UX & IA

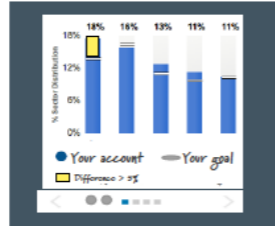
## Karen - tracking performance



Karen checks against her asset allocation goal



Karen looks at sector tracking. Taps on graph to see details



## ETF Education - Keep More of What You Earn 3

iShares by BLACKROCK

Keep More of What You Earn 3

See how iShares can help you keep more

Whether preparing for a comfortable retirement, seeking a steady income stream, or putting a plan in place for generations to come, iShares Funds can help you keep more of your earnings.

Ways iShares funds can help you save more

- 1. Title**  
 iShares Funds cost about 1/3 as much as the typical mutual fund.<sup>1</sup>  
 The impact of expenses on your fund's performance magnifies over time, making low fees especially important for long-term investments.
- 2. Intro = WHAT**  
 On average, the tax costs for iShares Funds are half that of the average active mutual fund.  
 You may owe taxes on your funds even if you didn't sell any shares during the year, potentially eating into returns.
- 3. Main Content = WHY**  
 Over time, index ETFs have outperformed the average actively managed mutual fund in their associated investment categories.  
 For example, the flagship Core S&P 500 ETF (IVV) has outperformed 88% of active mutual funds in its Morningstar category over a 10-year period.<sup>3</sup>
- 4. More content = WHY**  
 Your savings can really add up over time
- 5. Related Resources**  
 More about ETFs

- 1. Title**  
 Use this as a navigational element to go from topic to topic. Tap on it to bring up menu (see on the right). This lets users know that there is more education content and where they are in the overall section.
- 2. Intro = WHAT**  
 The introduction to the topic or (what is this about) can constitute of multiple components (e.g., a video + some text) and should be full width.
- 3. Main Content = WHY**  
 Separate key points as separate rows or one scrolling area. Text may come with images/graphs/infographics and links to other content or products.
- 4. More content = WHY**  
 Keep on applying the Concept principles to highlight products, and additional content.
- 5. Related Resources**  
 Use the footer (we'll make it sticky) to again remind users there is more educational content for them to peruse. THIS IS IMPORTANT. Per the client: "...most users currently do not continue through the ETF Education experience once they land on a certain page." We must push users to more ETF Education content.

schwab.com/client/transfer

Select Positions

Approx. Transfer Amount \$34,747

Select All Sort by Symbol

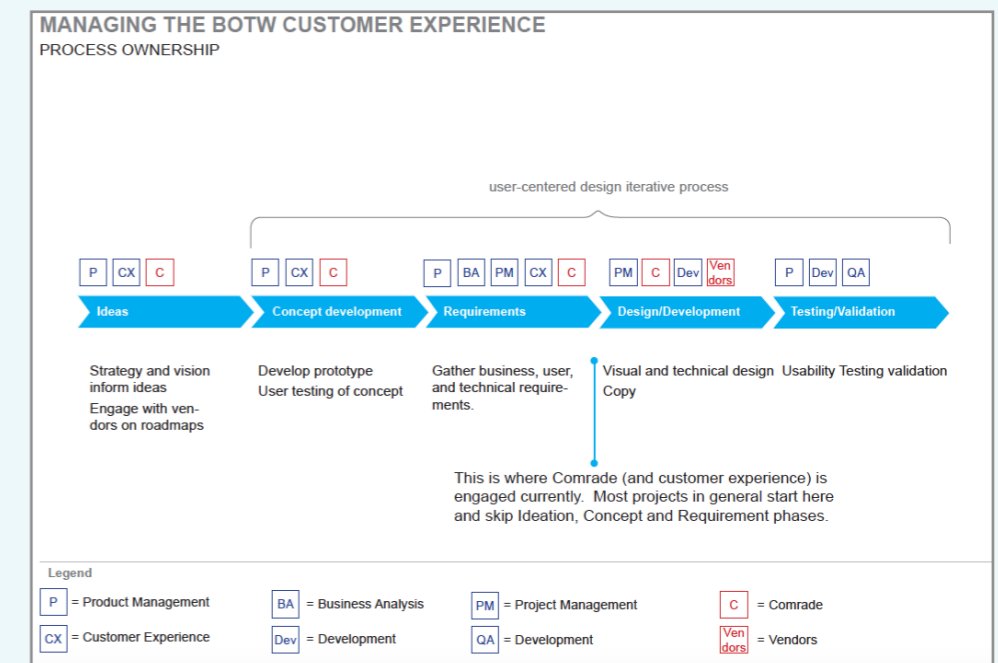
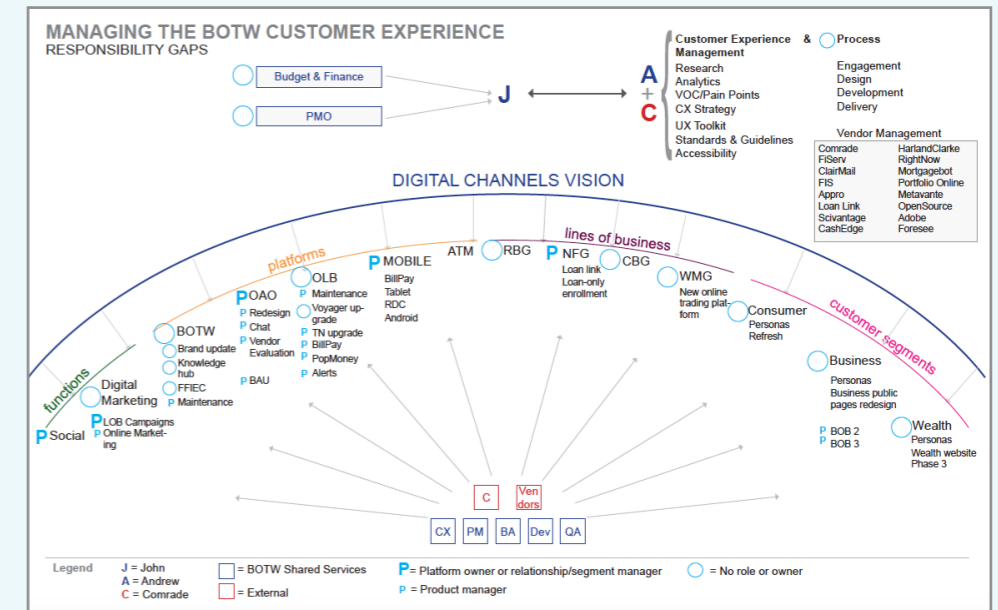
<input checked="" type="checkbox"/>	IBM	352 / 352
<input type="checkbox"/>	FEDEX	29.512 Shares
<input checked="" type="checkbox"/>	HPQ HEWLETT-PACKARD	200.882 / 512.882 Approx. \$34,647
<input type="checkbox"/>	JANSX	250 Shares
<input type="checkbox"/>	SWANX	512.882 Shares
<input type="checkbox"/>	SWPPX	4.12 Shares
<input type="checkbox"/>	ABC	222.12 Shares
<input type="checkbox"/>	DEF	4.12 Shares
<input type="checkbox"/>	HEX	352 Shares
<input type="checkbox"/>	DEF	4.12 Shares
<input type="checkbox"/>	HEX	352 Shares
<input type="checkbox"/>	EFJX	352 Shares

Submit

# PLANNING & DIRECTING


I enjoy helping teams design the roadmap and steps to a successful UX strategy. There is no magic recipe, each team must find the processes and objectives that work for their specific case.

- I have experience:
  - With Agile, Lean UX, Waterfall, and Pair Design methodologies
  - Bringing together teams of specialists or multi-skilled individuals
  - Directing UX designers, visual designers, copywriters, front-end developers, researchers, and business analysts
  - Producing roadmaps, infographics, reports, strategy documents, and executive presentations





# LEADERSHIP



**PRINCIPLE 1:  
SHOW, DON'T TELL**

**SKETCHING**

- Does not require any special material or advanced skill.
- The unfinished aspect of the deliverable forces conversations about content, features and flows rather than design.

**TIP**  
Have printed sheets with tablet and phone frames available. Print the frames close to full scale so that sketches are true to size.

**PROTOTYPING**

- Remains the best way to explain a flow.
- Has become the tool of choice to collect requirements.

**TIP**  
Maintain a matrix of prototyping tools and the type of projects they are most adequate for. Spread the knowledge about different tools among your team.

- 10 ways to improve your UX now
    - Slideshare presentation; 1,718 views
  - UX without documentation (l'UX sans documentation)
    - Presented at FLUPA UX day in Paris, Sept 19, 2014
- 
- Interactive I, CCA
    - Taught an interactive design class in the Graphic Design Program of the California College of the Arts
  - UX-PM Certification
    - Taught and contributed to the UX-PM Certification course materials, an international training program for professionals interested in managing UX projects
  - User-Centered Design, SFSU
    - Gave a lecture as part of the Digital Project Management course, Multimedia Studies Program, at San Francisco State University