PORTFOLIO

Sophie Henry

Hello! Bonjour!

Case Studies	Skills	Leadership
Top Office Services Company	User Research	Publications
UNICEF	UX and IA	Teaching
RMS	Planning & Directing	
Chase 360	Workshop Facilitation	
KaayaSoft		

WORK

TOP OFFICE SERVICES COMPANY

Coaching a cross-disciplinary team on design-thinking as part of a company-wide digital transformation

Faced with competitive pressure and a need to be more efficient, the client launched a company-wide initiative to digitize internal processes. This meant introducing a systemic approach to opportunity identification and product or process redesign based on Design Thinking methods to be used onward by internal talent.

- I worked closely with the team leading the Digital Transformation effort to identify the internal processes and challenges presenting the largest potential operational efficiency opportunities.
- I aligned with business stakeholders on constraints and requirements
- I coached a group of product owners, designers, and user researchers on how to run Design Thinking workshops from research and preparation to validation and business case reporting
- I taught by example by running two design sprints to expose the format, then advised on two additional ones
- I gained the trust of the Director of user experience and set her up for success internally
- I delivered a playbook on how to run Design Thinking workshops, tailored to the specific needs and imperatives of the client

What I learned:
Design Sprints are essential accelerators of a Digital Transformation initiative

PUT YOUR TEAM TOGETHER

Having the right team to prepare and run your sprint, as well as the right participants in the room, allows you to optimize the time spent in the sprint itself

Sprint team

SPRINT LEAD & FACILITATORS
Facilitators must be thoroughly familiar with the methodology and problem statement. The sprint lead will also

TECHNOLOGY & DESIGN EXPERTS
A multi-disciplinary team is necessary to run a concept sprint. Designers help the team translate their ideas into a testable

Partici-pants

LIGHTNING IDEATION

Time	• 45 minutes (Individual)
Objective	• Produce as many ideas as possible to improve the user experience based upon the pain point prioritization
Instructions	• For each pain point discussed earlier, individuals come up with as many ideas as they can in a restricted timeframe imposed by the facilitator • Participants should use one Post-it per idea. Text, sketches or flowcharts can be used to describe the ideas. Identify the pain point the idea is for in a corner of each Post-it. (5 min per pain point)
Props	

LIGHTNING IDEATION TIPS AND EXAMPLES

| Facilitator Tips	• If people get stuck, ask questions to boost their thinking such as "What if there was no screen? How could [technology XYZ] be used? • If you have two facilitators, have one facilitate the conversation while the other moves Post-Its to the board and starts clustering them • If new ideas come up during the share out of ideas, make sure to write them down on a new Post-It and to add it to the board

UNICEF

Redesigning the user and content publishing experiences of the UNICEF website ecosystem

UNICEF manages over 200 websites, from their global portal (www.unicef.org) to country or campaign specific sites. To increase content publishing efficiency as well as brand adherence, UNICEF needed to deploy simultaneously a new content management system and a redesign of their ecosystem.

- I researched end-user and content publisher needs. I reviewed site analytics and interviewed global, regional, and country teams to identify the main content needs and the most important pain points of the current publishing workflows and rules.

- Leveraging our client's content strategy, I aligned the purpose of each type of content to be published with end-user needs and institution objectives, leading to a slimmed down set of page templates, CMS content types, and design modules

- Working with a team of visual designers, I created a flexible and responsive design system based on the principles of atomic design

- I translated publishing rules and workflows into user stories to be used by developers and business owners

- I designed a navigation structure for the ecosystem that significantly simplified production and maintenance of content

- I wrote a wiki and conducted work sessions remotely to train the publishing team on how to use the CMS

What I learned:
Articulating the purpose of the elements of the design system provided designers, developers and content publishers with the necessary rationale to better do their work
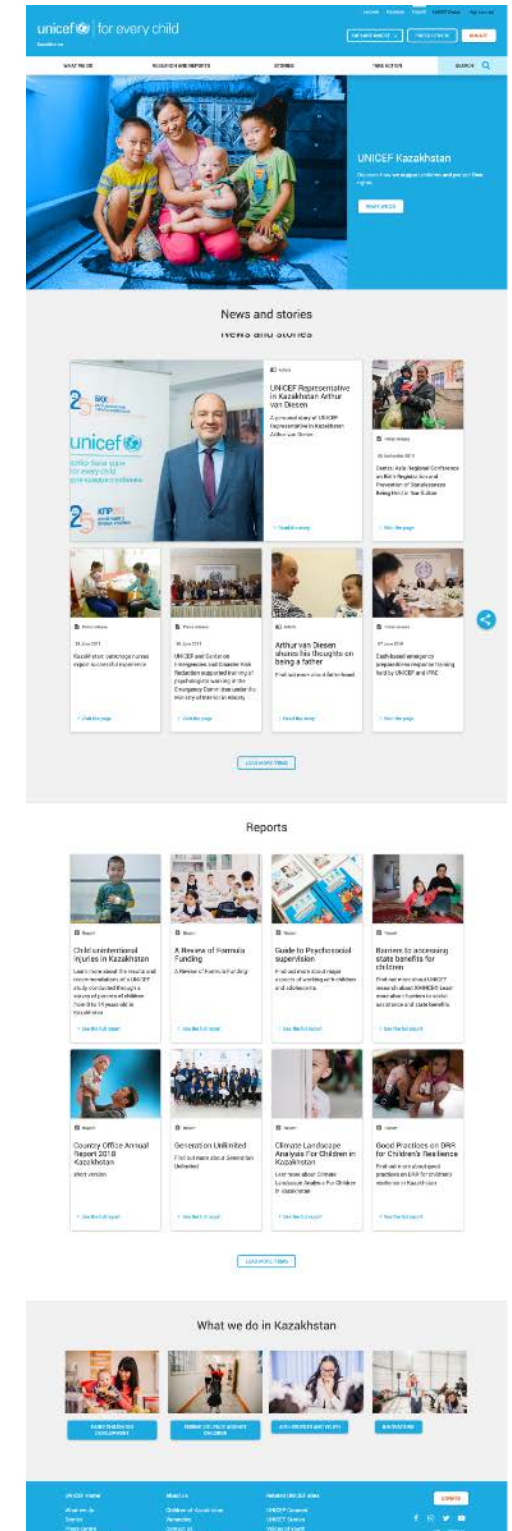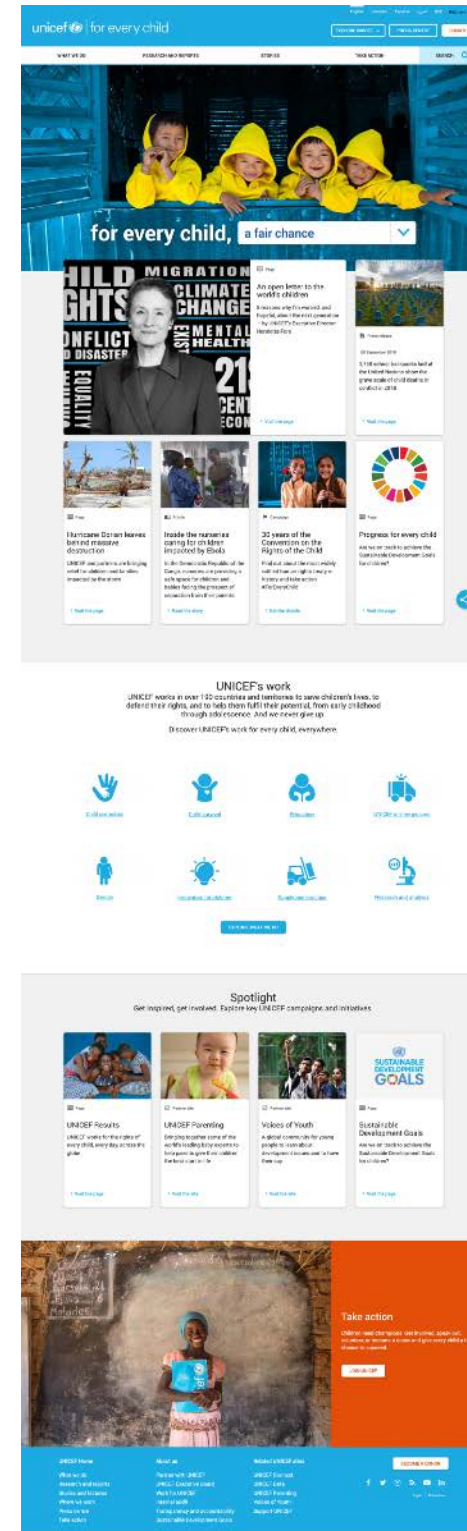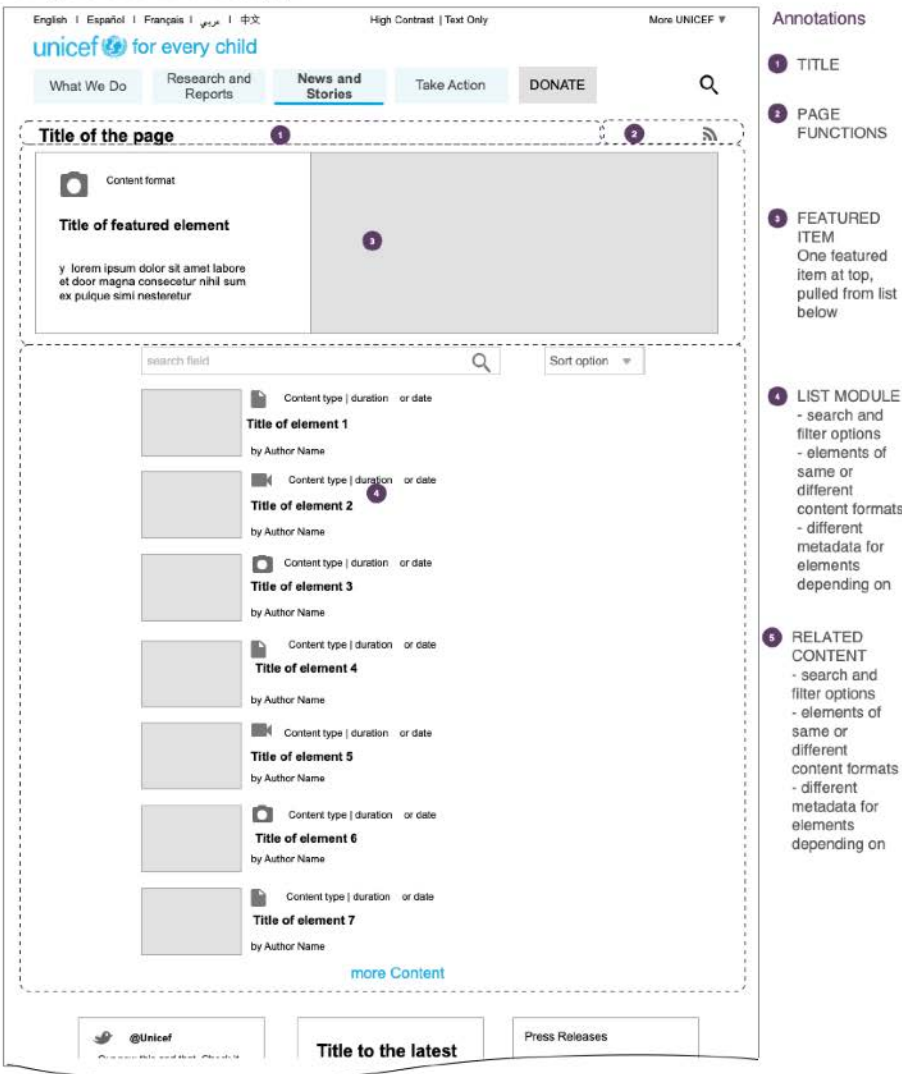
UNICEF: ADDITIONAL DELIVERABLES
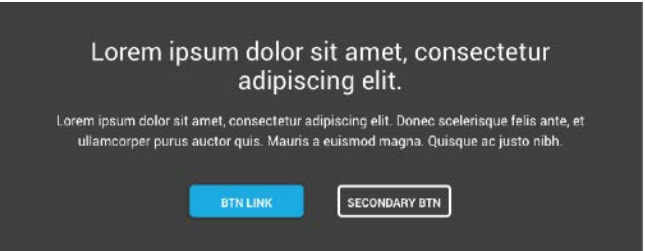
Page templates were annotated and explained

Design system modules were designed in three sizes (desktop, tablet. mobile)

RMS

Redesigning a data-intensive risk-management platform for 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 foundation for tackling tougher UX issues
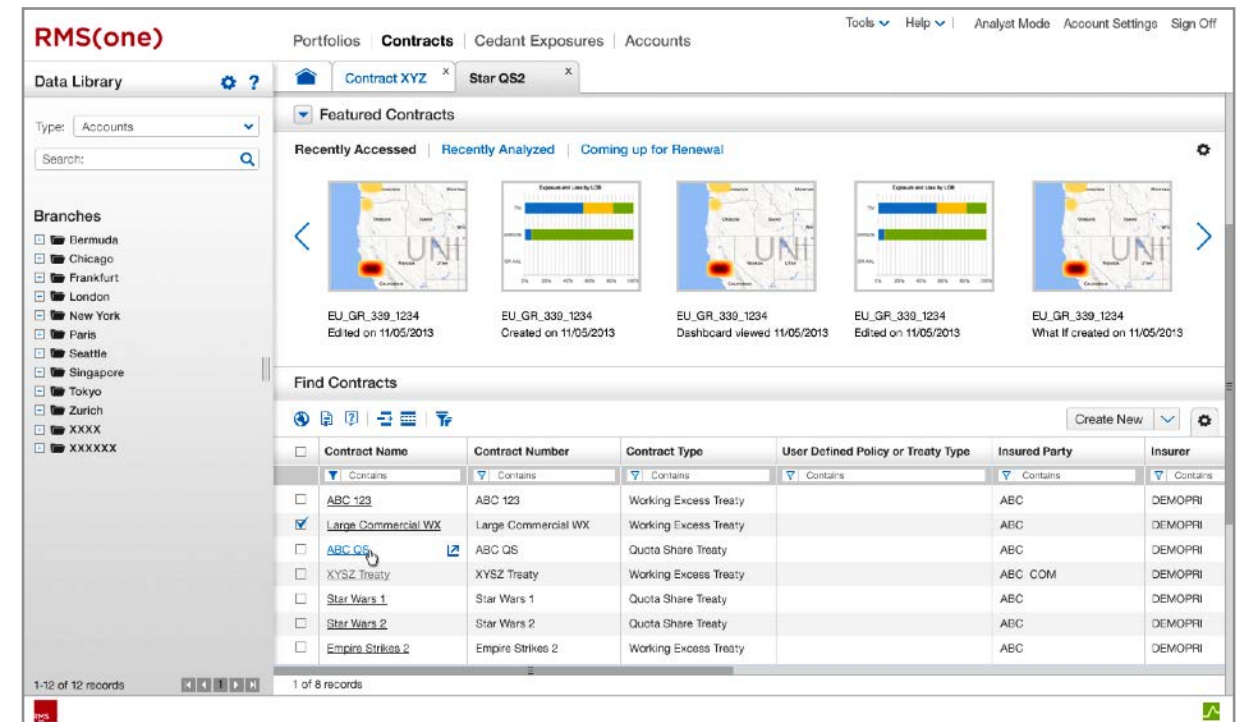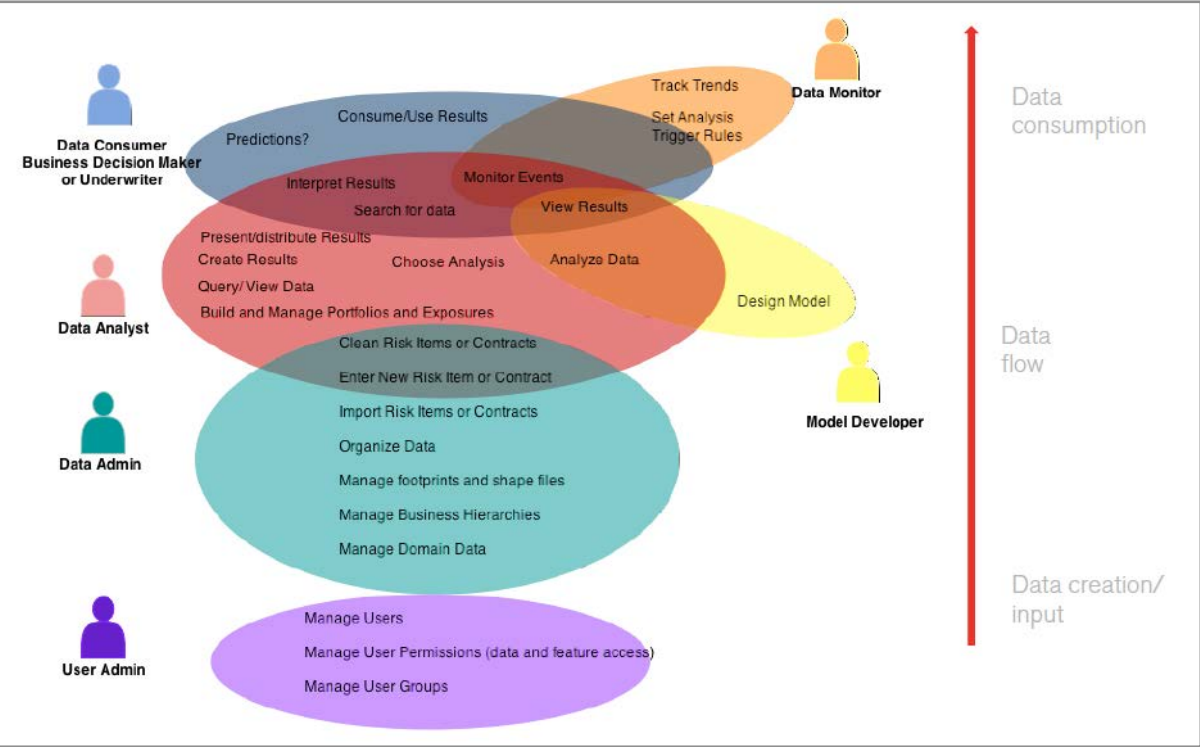

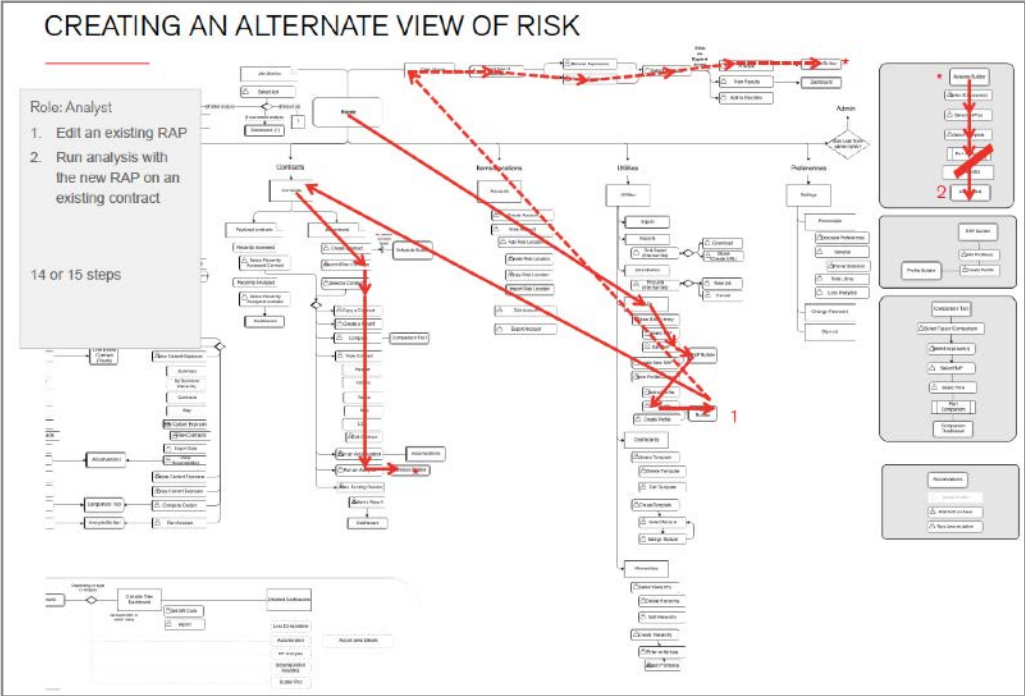improved layouts and visuals
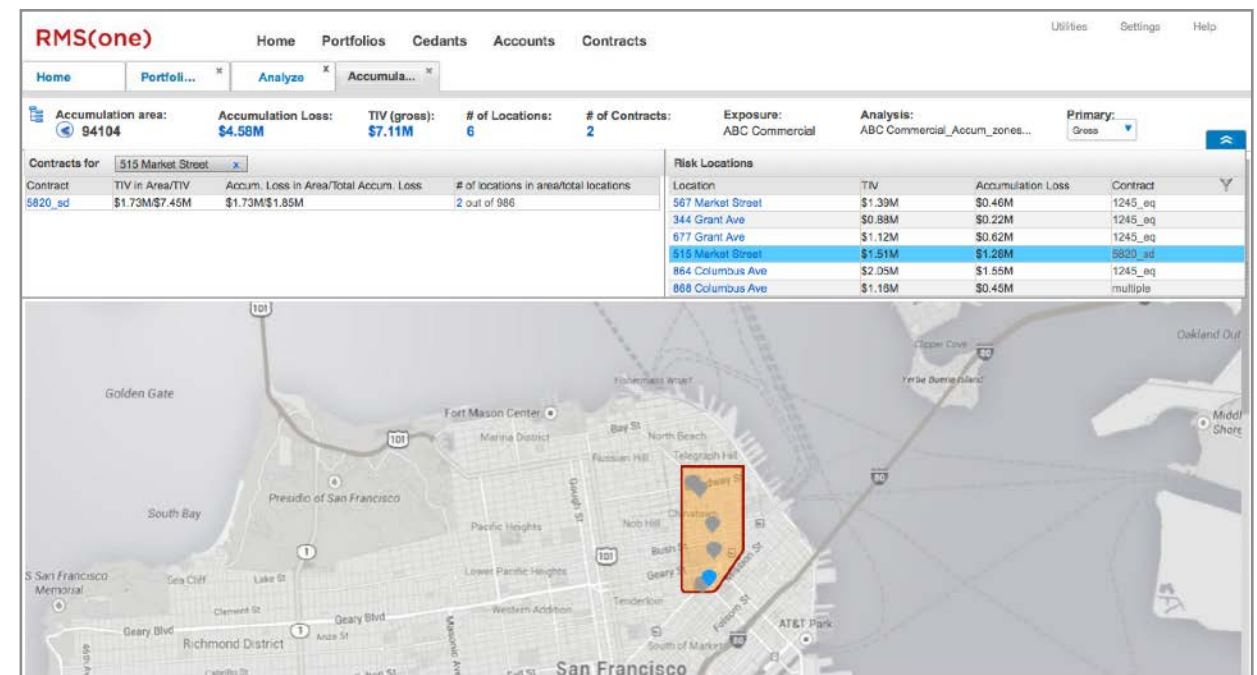
interactive prototypes

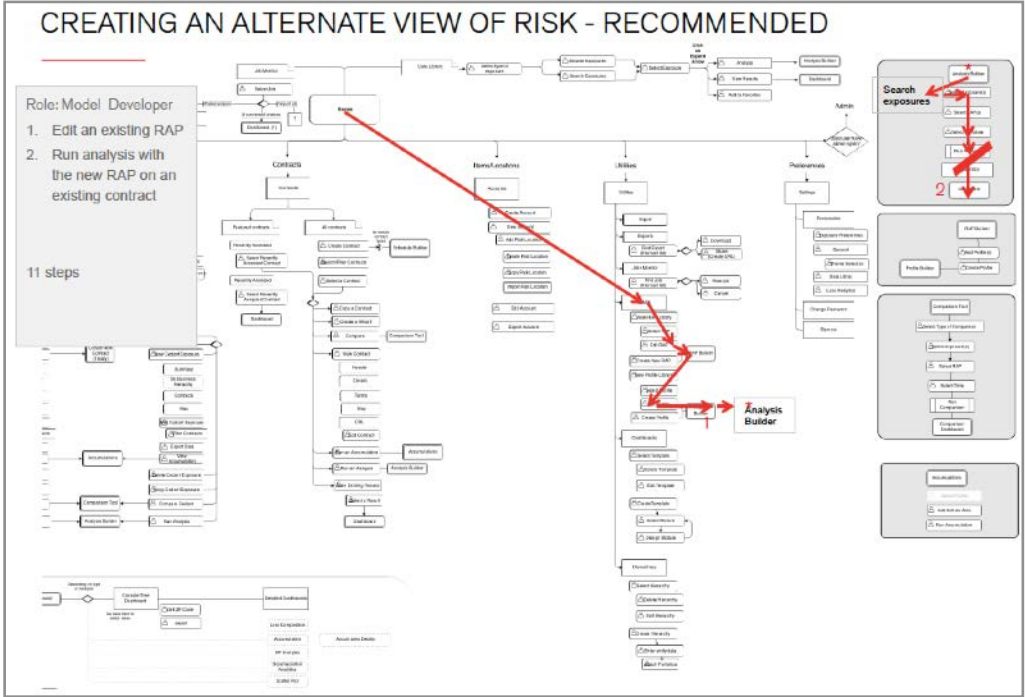# RMS: ADDITIONAL DELIVERABLES

user role/task mapping

from

to

visualizations of improved user paths

CHASE 360

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

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 scaleable 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

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CHASE 360

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

1. Driving insights from user research, and focusing on the accounts screen, I designed a few options. I ran user tests to select how much information to display by default and to validate the overall product concept.

collapsed rows

expanded rows

2. Using call center data, I refined the information to be shown in the default screens, and helped the team prioritize the 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.
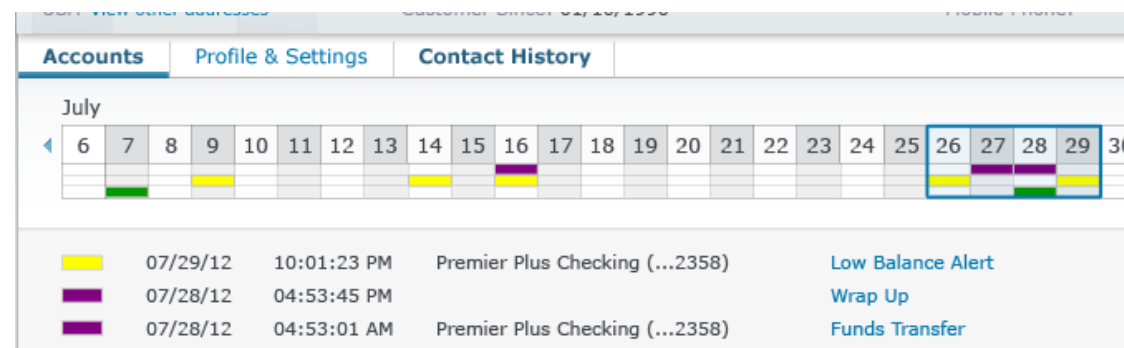
https://projects.invisionapp.com/share/XZF28ABQD

KAAYASOFT

Partnering with a startup to design their first product
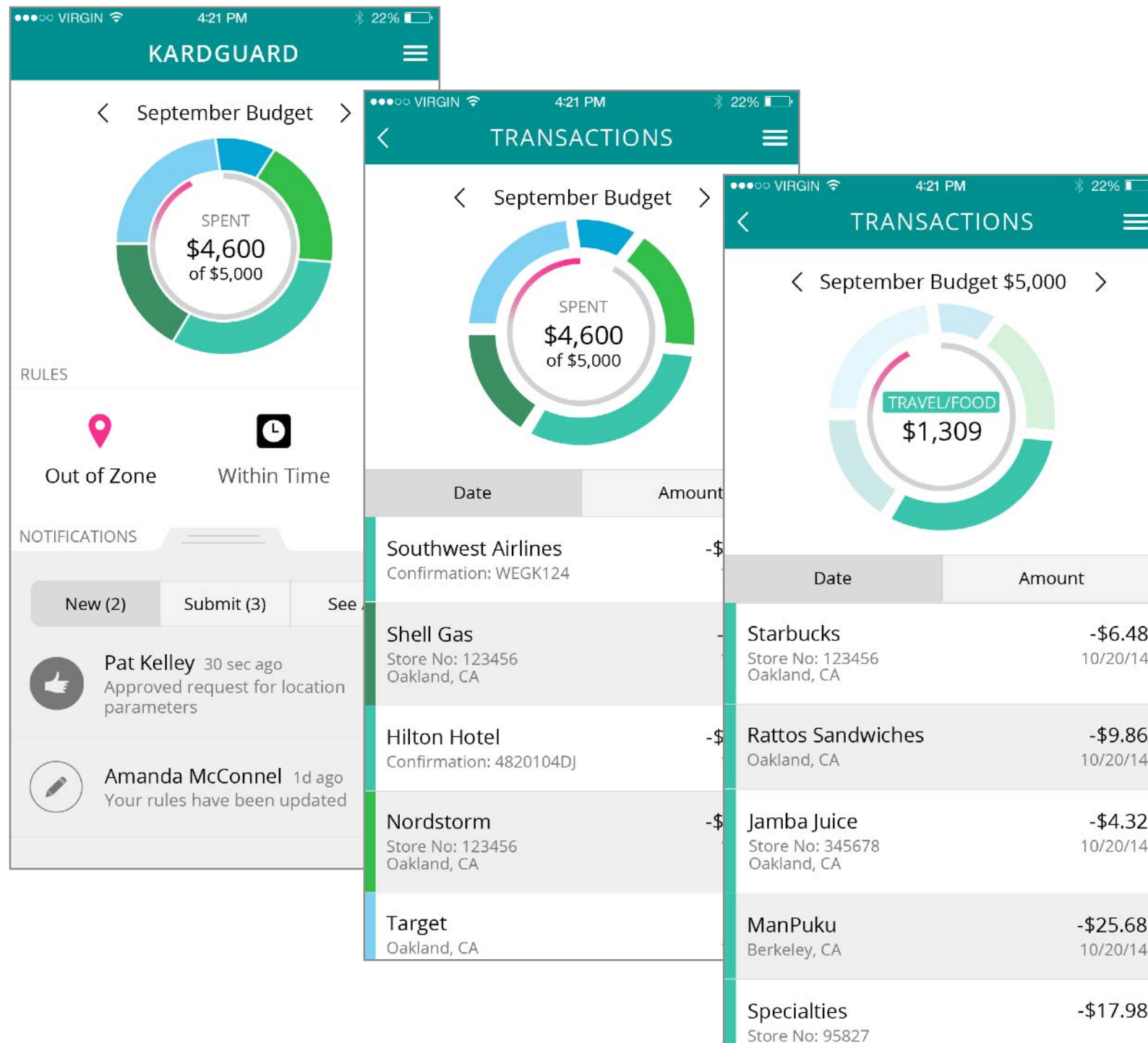
There is a lot riding on the quality and usability of the user interface of a startup's first product. Making sure the user experience is self-explanatory and sets itself apart from competition is of foremost importance. Working closely with the CEO and Product Marketing Manager of KaayaSoft, as well 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

SKILLS

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

heuristic evaluation results matrix

PERSONAS & JOURNEYS

Silvers — Sally

Attitude towards Online Security:

uncomfortable — fine with it

Purpose of Service:

organization — communication

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.
- 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.
- 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)

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.

Allison

	Discovery	Consideration	Financing Selection	Signing
Goals (What is the user trying to accomplish?)	I want to know my next car will fit my needs and my values	I want to be dealt with as a person not just as someone with money	I need the process to be as smooth as possible and I trust the dealership to present me the best options	I wanted them to work with me but they wouldn't or couldn't

Experience (What are the steps?)

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

Emotions (How is the user feeling?)

Thoughts (What is this user thinking?)

Discovery:
- I kind of trust the dealership and my credit is great. I know I'll get a great 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

Consideration:
- 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

Financing Selection:
- 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!
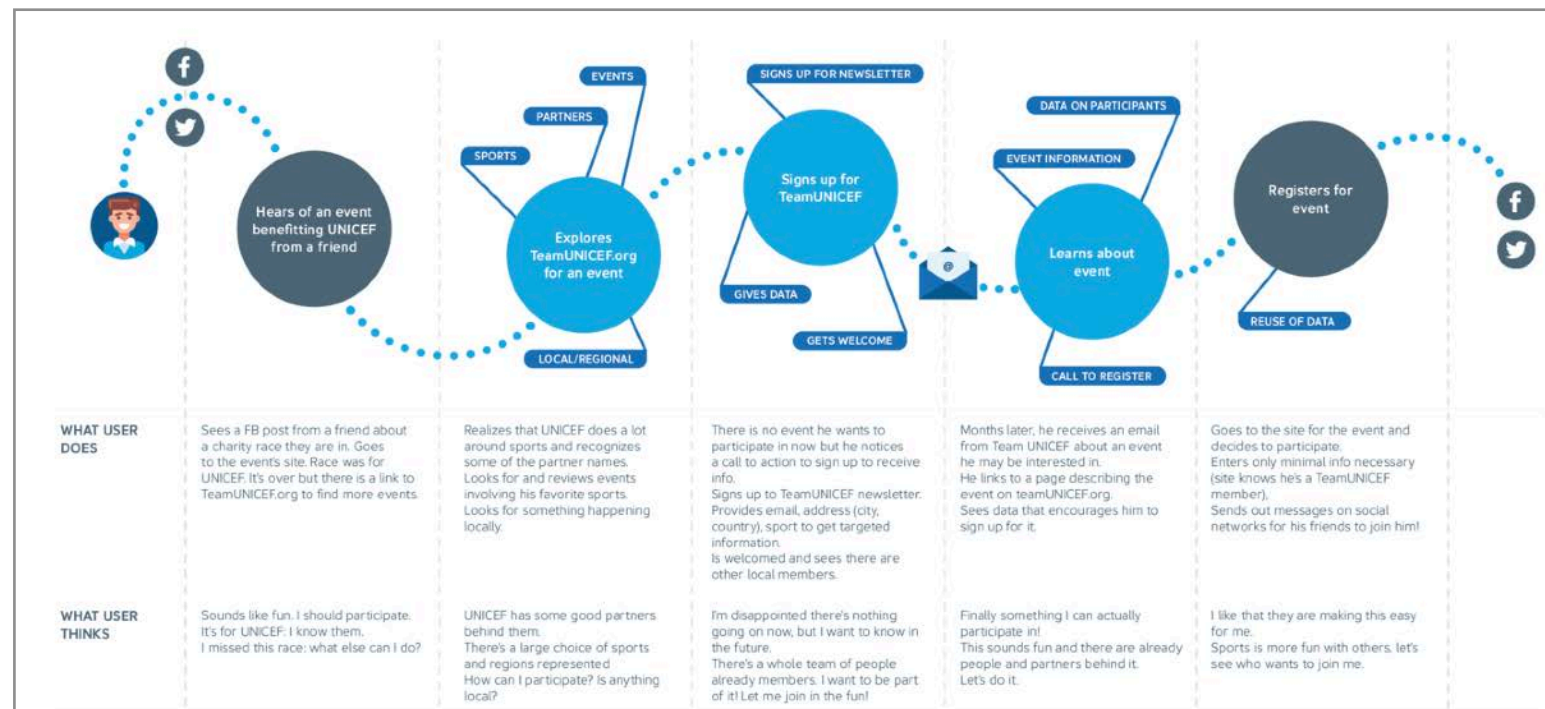- I don't feel they are making enough of an effort

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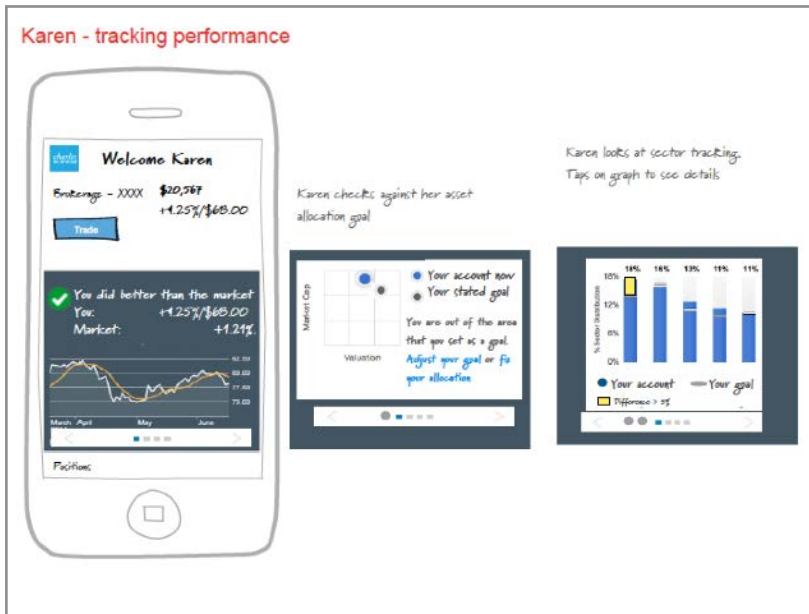- They could have done a lot more to try to sell me the car. I really wanted it!
- At the other dealership, I realize there were fees and other protection products that could have been part of the negotiation at AUTO that I didn't even think of asking about. I was focused on rate and loan terms, but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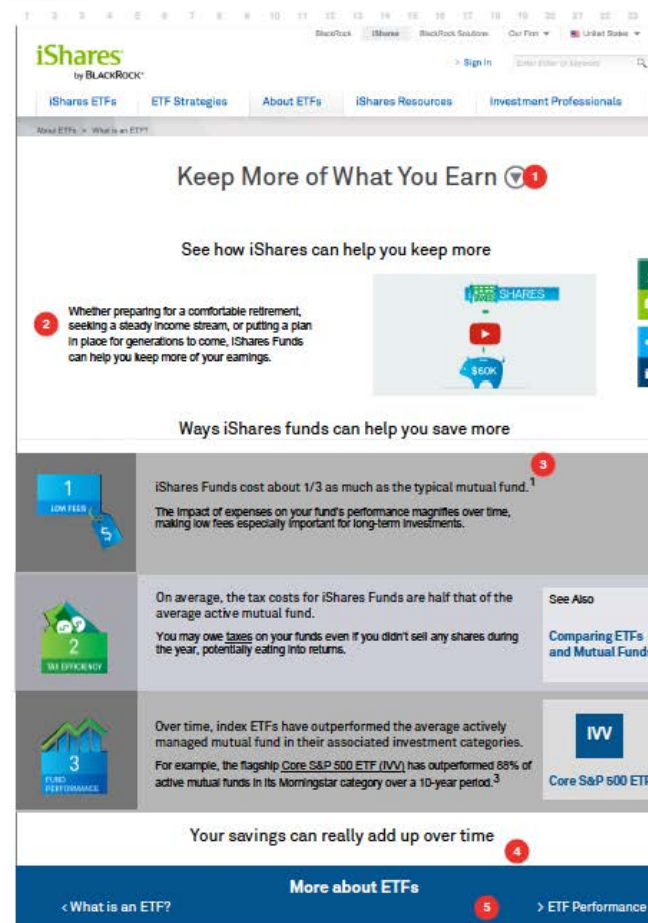- Looking back, I don't think that the AUTO salesperson was creative enough in meeting my needs

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WHAT USER DOES	Sees a FB post from a friend about a charity race they are in. Goes to the events site. Race was for UNICEF. It's over but there is a link to TeamUNICEF.org to find more events.	Realizes that UNICEF does a lot around sports and recognizes some of the partner names. Looks for and reviews events involving his favorite sports. Looks for something happening locally.	There is no event he wants to participate in now but he notices a call to action to sign up to receive info. Signs up to TeamUNICEF newsletter. Provides email, address (city, country), sport to get targeted information. Is welcomed and sees there are other local members.	Months later, he receives an email from Team UNICEF about an event he may be interested in. He links to a page describing the event on teamUNICEF.org. Sees data that encourages him to sign up for it.	Goes to the site for the event and decides to participate. Enters only minimal info necessary (site knows he's a TeamUNICEF member). Sends out messages on social networks for his friends to join him!
WHAT USER THINKS	Sounds like fun. I should participate. It's for UNICEF: I know them. I missed this race: what else can I do?	UNICEF has some good partners behind them. There's a large choice of sports and regions represented. How can I participate? Is anything local?	I'm disappointed there's nothing going on now, but I want to know in the future. There's a whole team of people already members. I want to be part of it! Let me join in the fun!	Finally something I can actually participate in! This sounds fun and there are already people and partners behind it. Let's do it.	I like that they are making this easy for me. Sports is more fun with others, let's see who wants to join me.

(Events, Partners, Sports, Local/Regional, Signs up for TeamUNICEF, Gives Data, Gets Welcome, Signs up for Newsletter, Data on Participants, Event Information, Call to Register, Reuse of Data, Learns about event, Registers for event, Hears of an event benefitting UNICEF from a friend, Explores TeamUNICEF.org for an event)

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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

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.
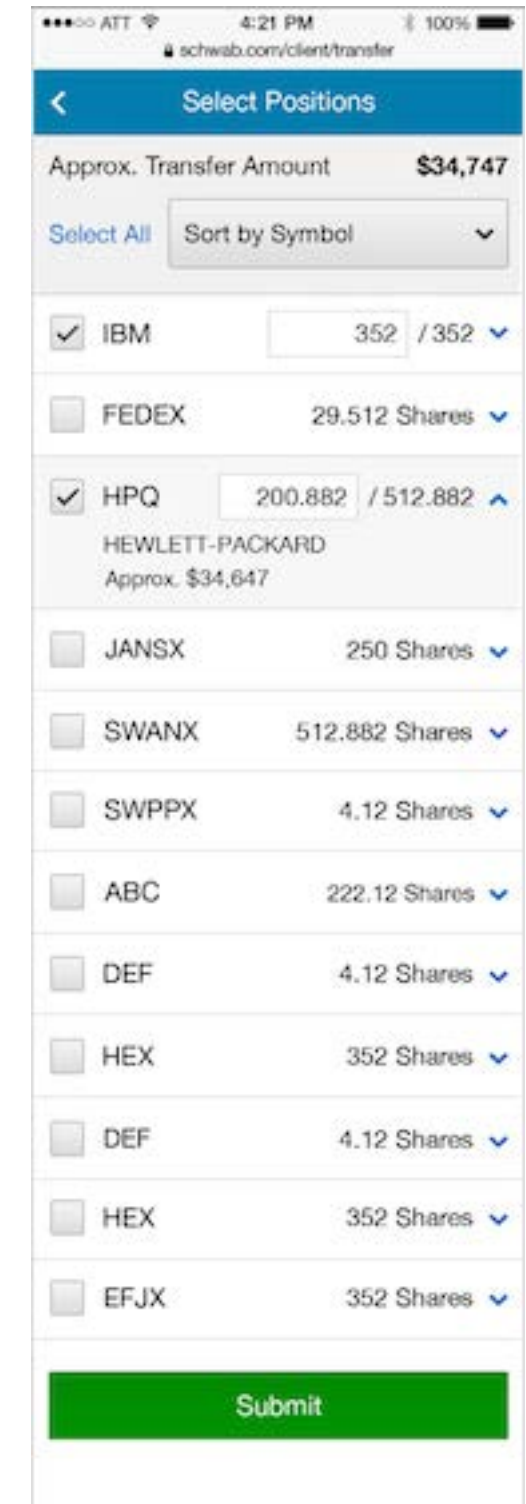
PLANNING & DIRECTING

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
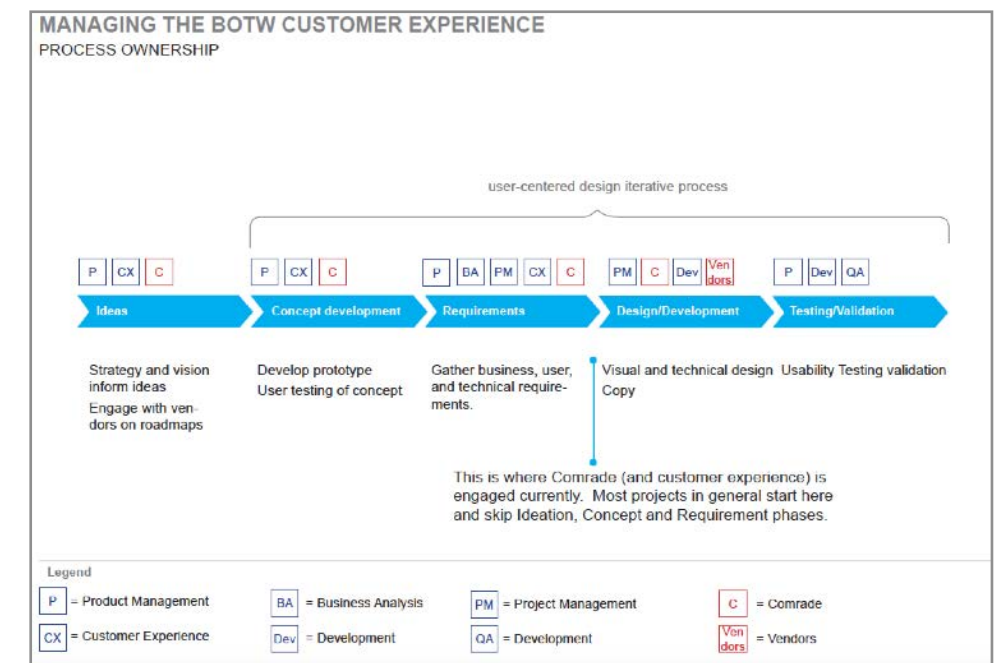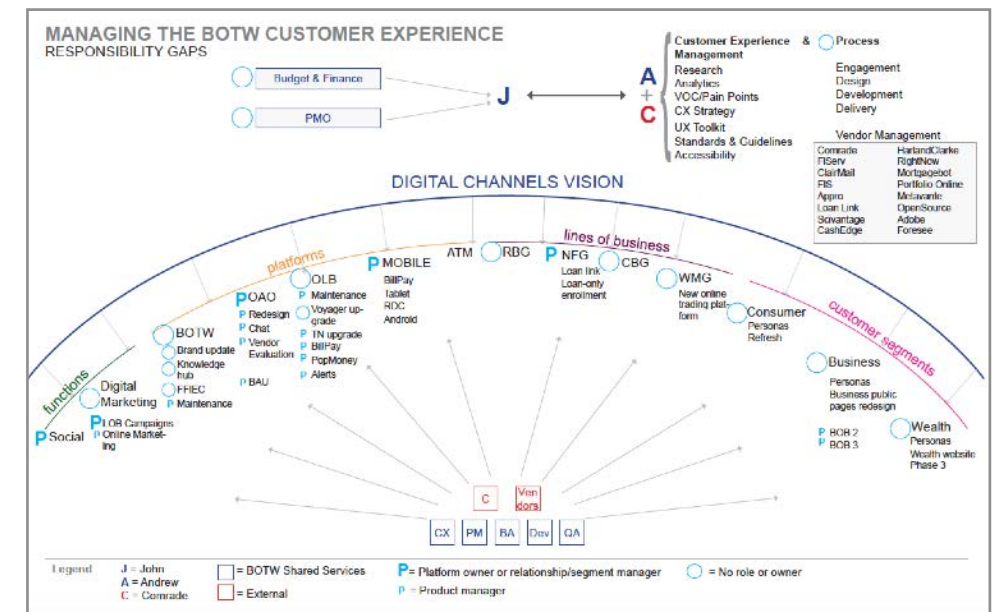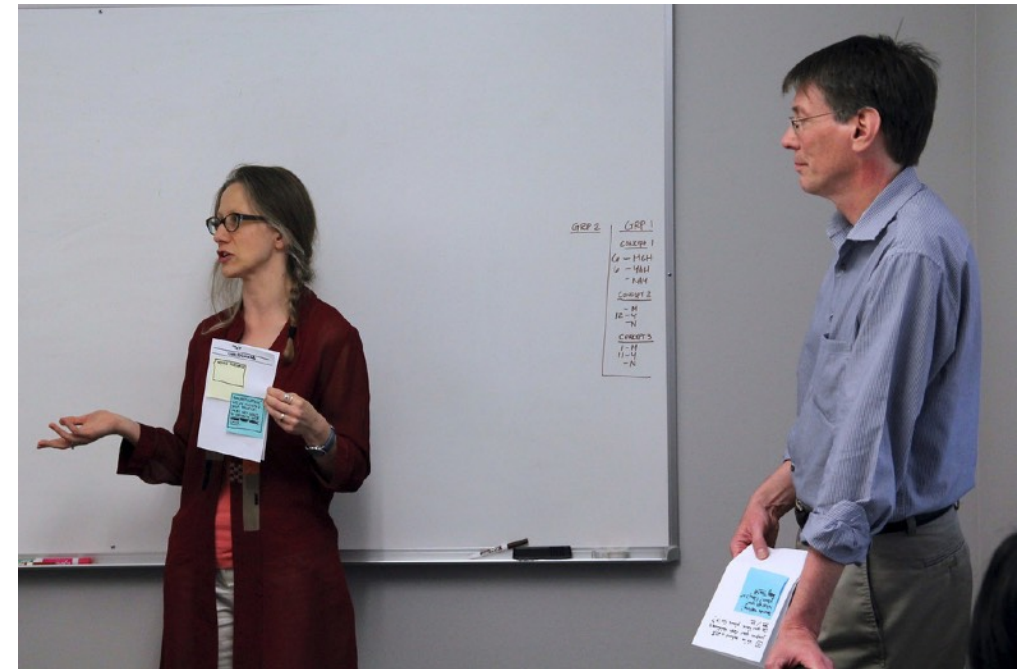
WORKSHOP FACILITATION

I believe in design thinking and in the power of bringing cross-functional team members together in design sprints

- I have experience preparing and facilitating workshops ranging from a few hours to a week and from three to 35 participants

- I use different methods and activities appropriate for the team I am working with to ideate, prioritize, build empathy, or define challenges and align on solutions.

LEADERSHIP

- ## 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 1, 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