# SOPHIE HENRY - PORTFOLIO

# Bonjour !

## Case Studies

Digital Transformation at a Fortune 500 company

Re-imagining the Prospect to Tenant Journey

Care Management & Patient Engagement Platform

UNICEF

RMS

## Leadership Skills

Design Thinking Coaching

Workshop Facilitation

User Research

Publications & Teaching

# WORK

# BUSINESS SOLUTIONS FORTUNE 500 COMPANY

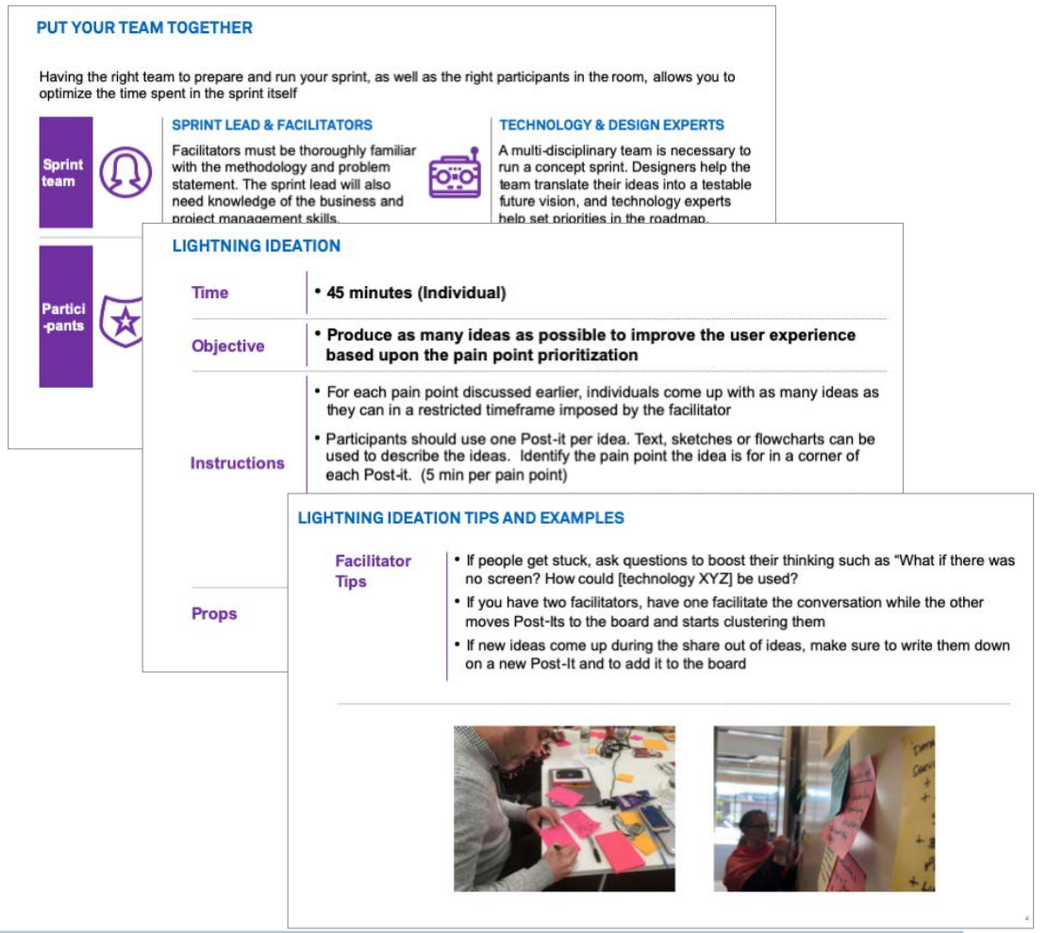
## Introducing Design Sprints as part of a company-wide digital transformation

Faced with competitive pressure, the client needed to increase their operational cost efficiency and launched a company-wide initiative to digitize internal processes. This meant introducing a systemic approach to identify opportunities and to redesign processes while leveraging in-house talent from business, technology and design groups. I was asked to organize and facilitate design sprints for four initiatives and to concurrently coach a cross-disciplinary team of designers, product owners, and developers.

- I worked closely with the team leading the Digital Transformation effort to prioritize initiatives for potential impact
- I aligned with business stakeholders on constraints and requirements specific to their teams and business area, and collaborated closely with the director of user experience to set her up for success internally
- I coached a group of product owners, designers, developers and user researchers on how to run design sprints from research and preparation to validation and business case reporting
- I taught by example by running two three-day design sprints to expose the format, then advised on two additional ones
- I delivered a playbook tailored to the specific needs of the client

*What I learned:*

*Design Sprints are essential elements of a Digital Transformation effort. They accelerate initiatives and offer a powerful way to leverage a company's in-house talent.*

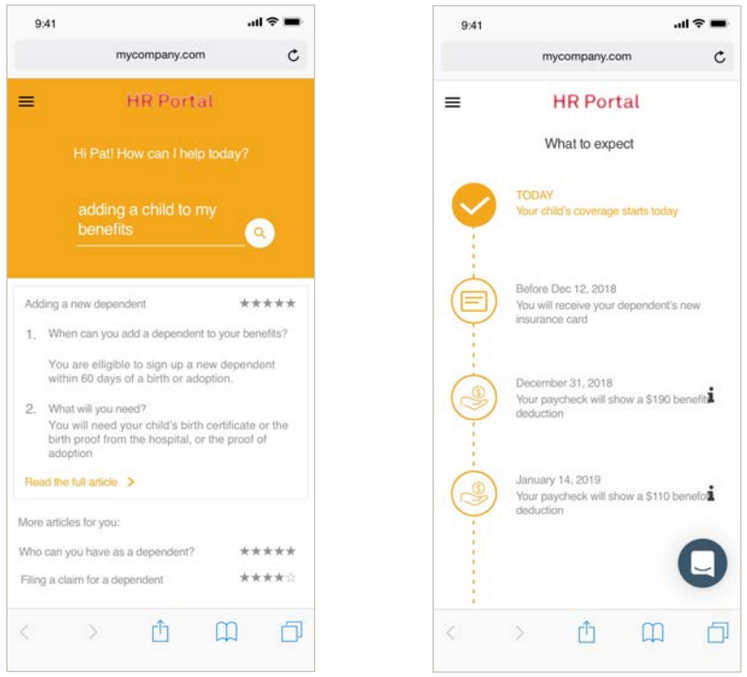


# BUSINESS SOLUTIONS FORTUNE 500 COMPANY

## Improving internal processes with Design Thinking

### Create a better experience for employees in need of HR assistance

- The 35 participants in this first sprint arrived at a phased solution focused on improvements to the internal HR portal search tool and content so that an AI-based chatbot could be implemented to help employees going through major life events (planning, research, facilitation, prototype design)

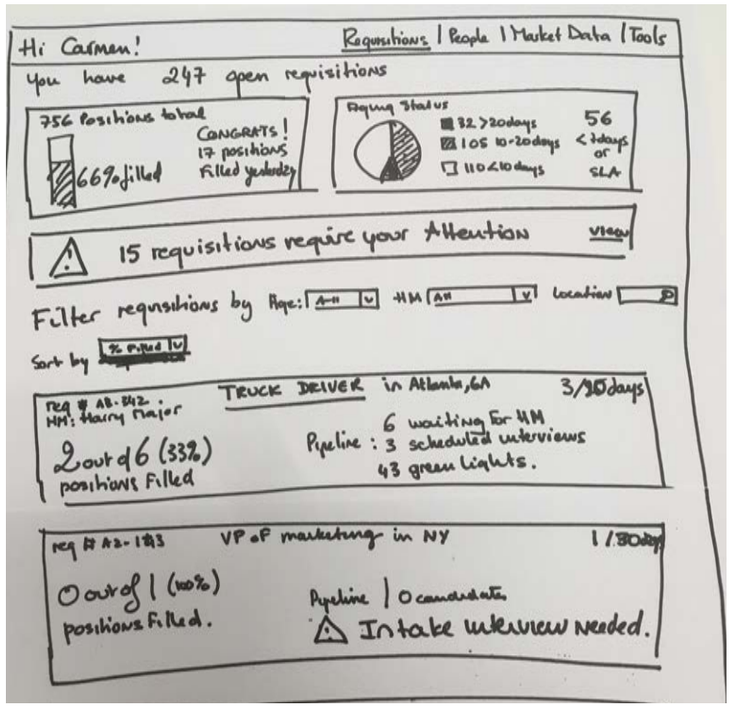



### Digitize the invoicing and collection experience

- The team identified multiple solutions including a list of system integration issues to resolve that were added to an existing effort, saving development costs (research, prototype design and facilitation)

### Improve sourcing and screening processes for recruiters

- By focusing on delivering a candidate-friendly mobile application and leveraging AI technology, the team designed an innovative solution that removed the need for recruiters to intervene in the screening process unless absolutely necessary, freeing them to contact only relevant candidates. (planning, research, facilitation, coaching)




### Transform tax notice resolution processes

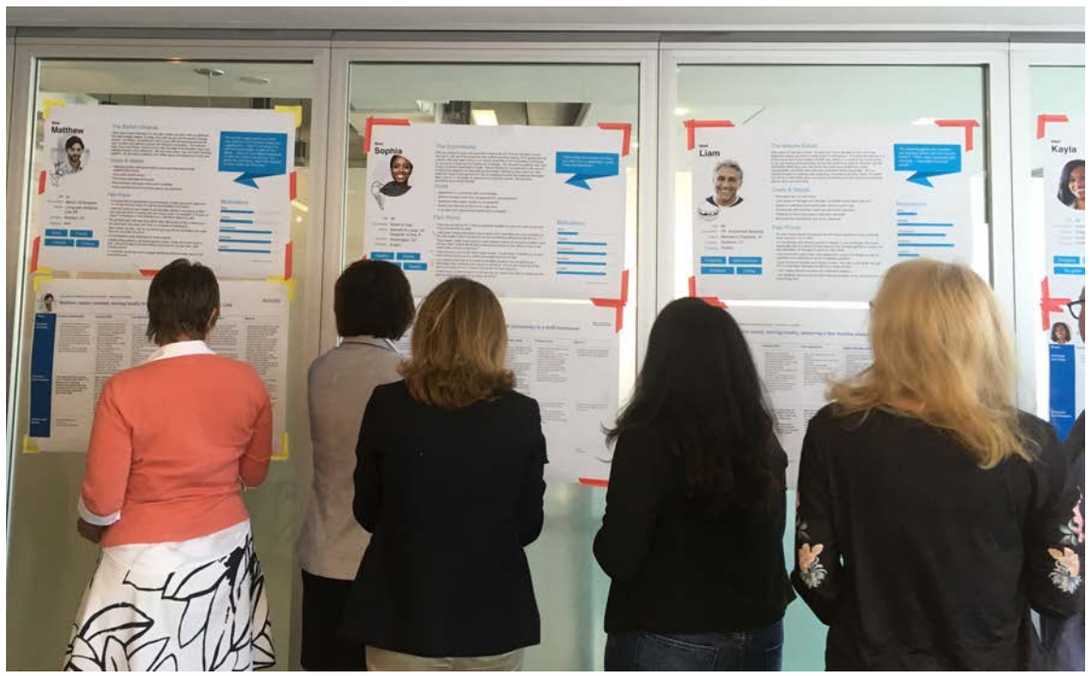
- The team aligned on a vision of key features to be delivered across business units. The sprint was the first time many members of this geographically dispersed division met their coworkers in person. (planning, research, coaching)

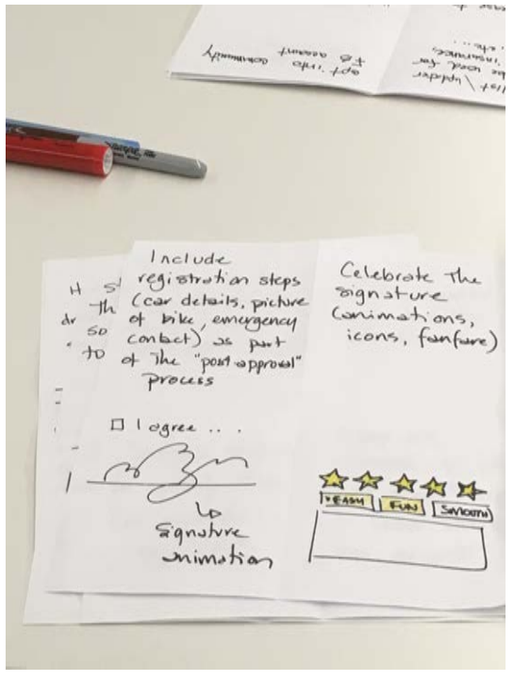
# REAL ESTATE COMMUNITY DEVELOPER

**Redesigning the customer experience for prospect tenants while improving cost efficiency and employee job satisfaction**

After collecting data on their tenants' experience, the client decided to focus on the prospect journey to find innovative ways to improve the customer experience, cut operational costs, and increase associate job satisfaction.

- I gathered and synthesized existing and new research on tenant and associate experiences with the prospect to tenant journey
- I facilitated a five-day design sprint with stakeholders, managers and associates from divisions involved in tenant acquisition or operations
- After the design sprint, I summarized the vision for the future prospect-to-tenant experience in a single service blueprint
- With the design sprint output in hand, the client developed an MVP for the experience through implementation of a chatbot for prospects



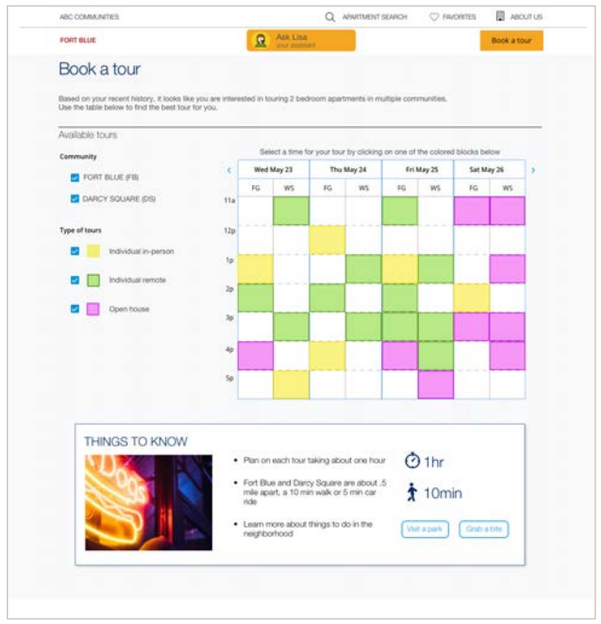

*What I learned:*

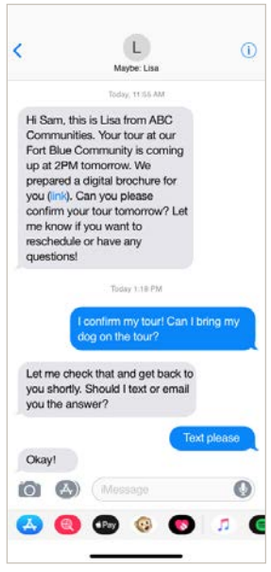
*By combining user-centered and collaborative design in a design sprint, the client successfully and simultaneously reached objectives that may originally have appeared to be incompatible*

# REAL ESTATE COMMUNITY DEVELOPER

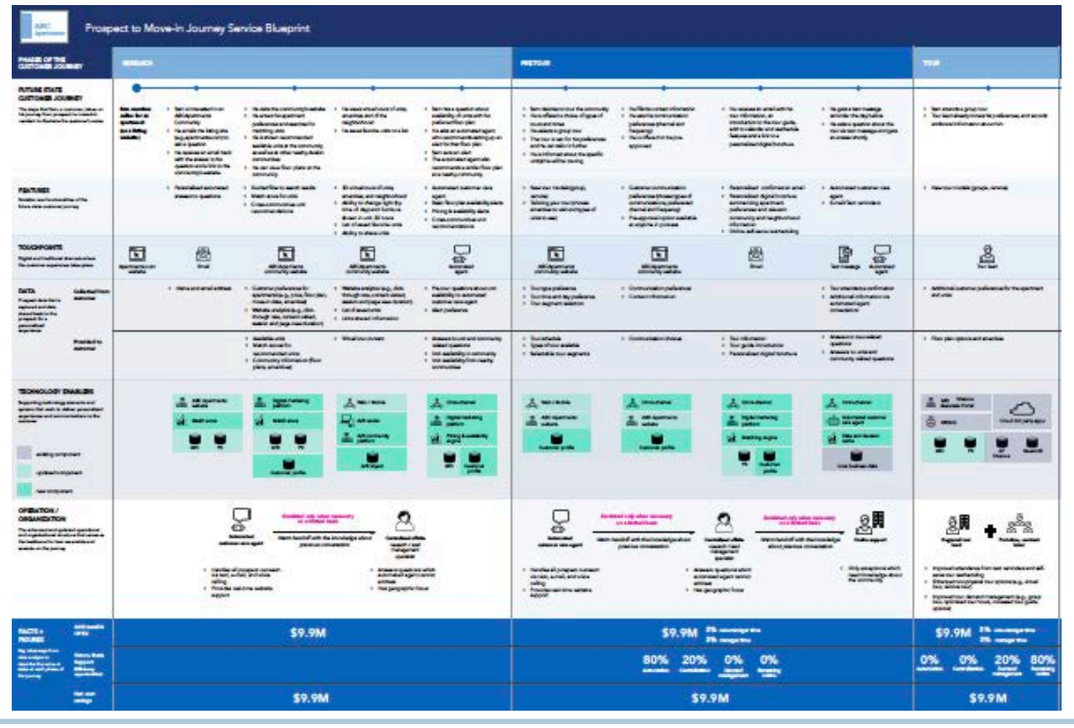
## Deliverables

1. A multi-format digital prototype validated with employees and prospect tenants during the sprint




2. A service blueprint describing the new prospect to tenant journey, the technology enablers required to support it, and the operational cost savings to be expected




3. Illustrated storyboards of the full future experience

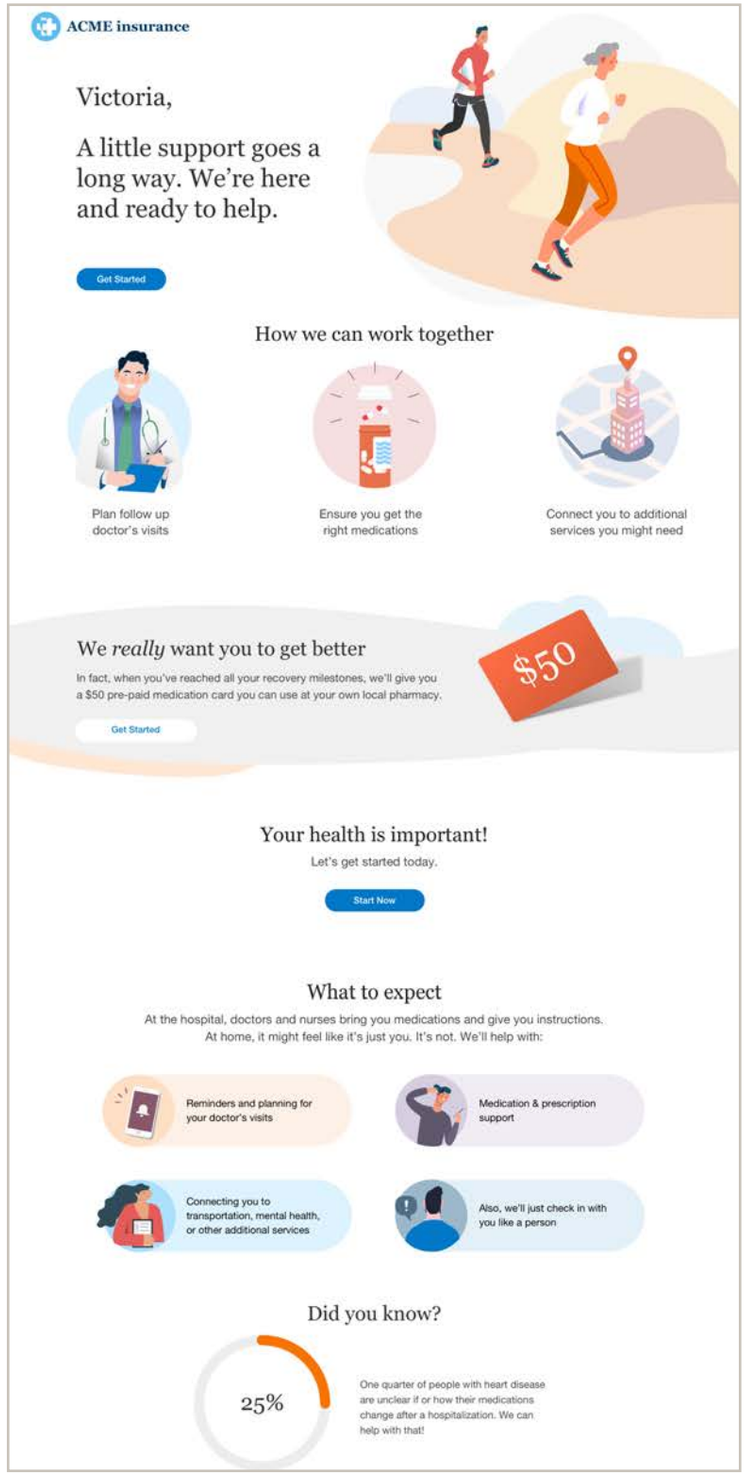
# HEALTH INSURANCE COMPANY

## Designing a care management platform for personalized patient engagement

A leader in Healthcare Consulting Services wanted to build a working tool in 3 months to highlight their know-how in healthcare technology integration, patient engagement strategies and care management best practices.

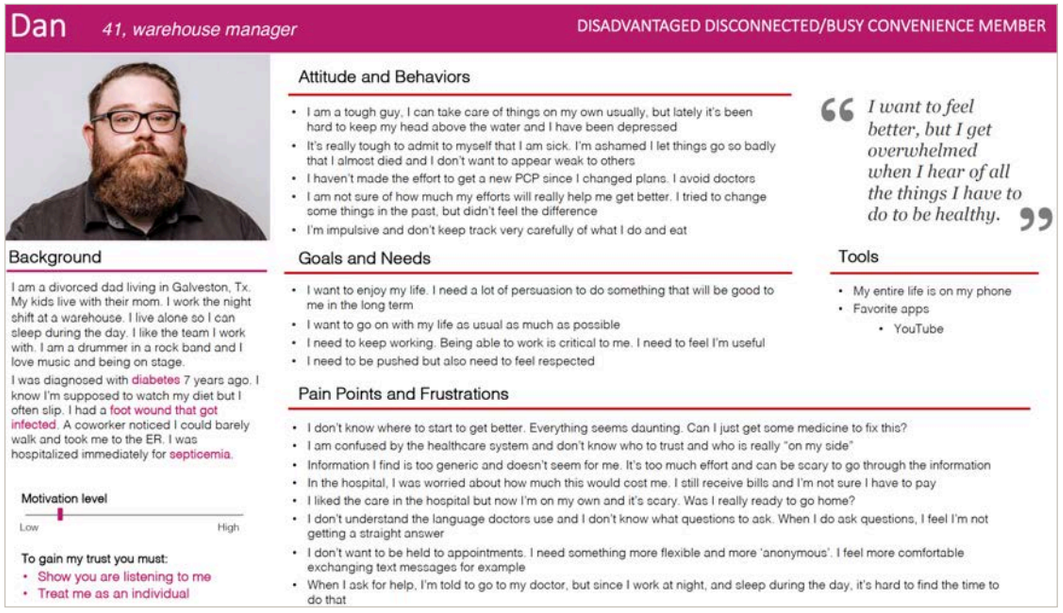
- I planned, executed and synthesized user research with patients and care managers to inform product definition and design
- I facilitated design thinking workshops with stakeholders to get alignment on product requirements, MVP definition, and design direction
- I managed a team of ux designers, visual designers and a copywriter to deliver all design assets for the MVP implementation
- I handled communications and reviews with the product and development teams (all in remote locations)
- I kept stakeholders updated and participated in strategic conversations to steer the product's definition and use

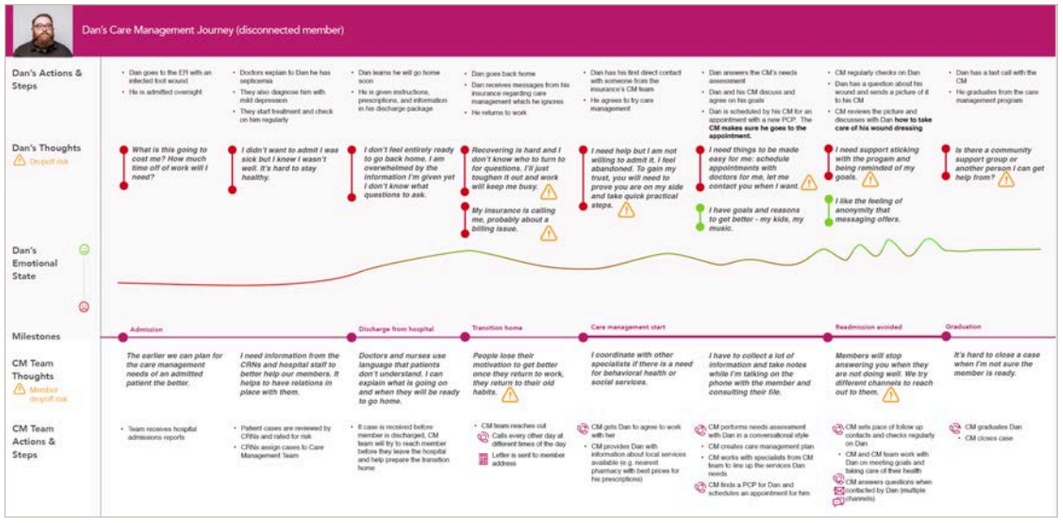
*What I learned:*
*Designers are in the best position to be the bridge between stakeholders and departments on complex products involving multiple audiences and objectives.*



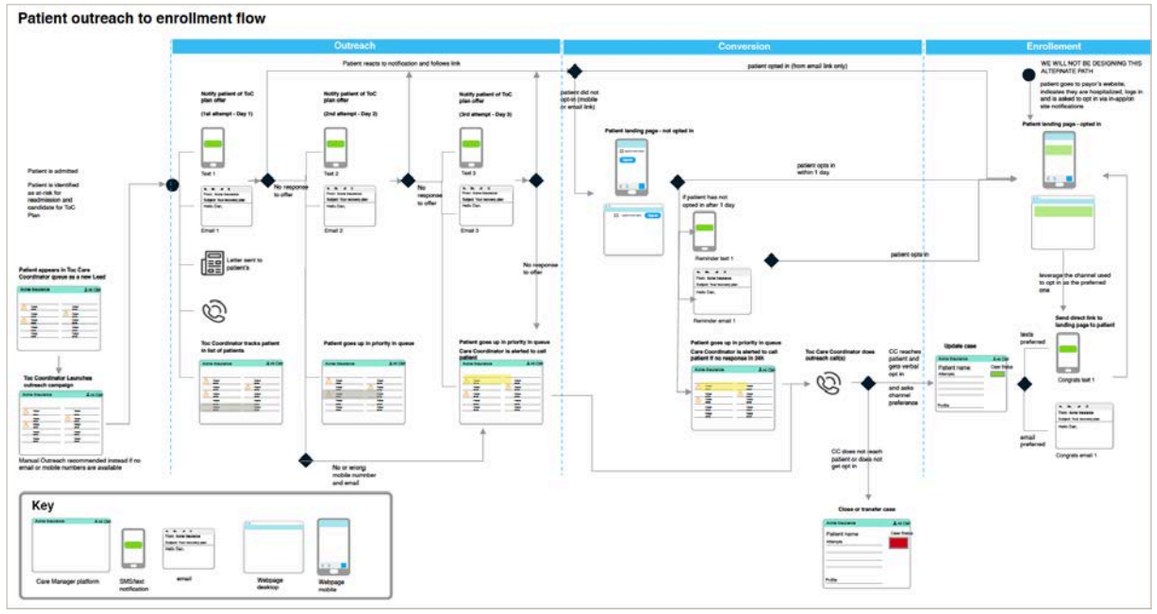
# CARE MANAGEMENT PLATFORM: DELIVERABLES

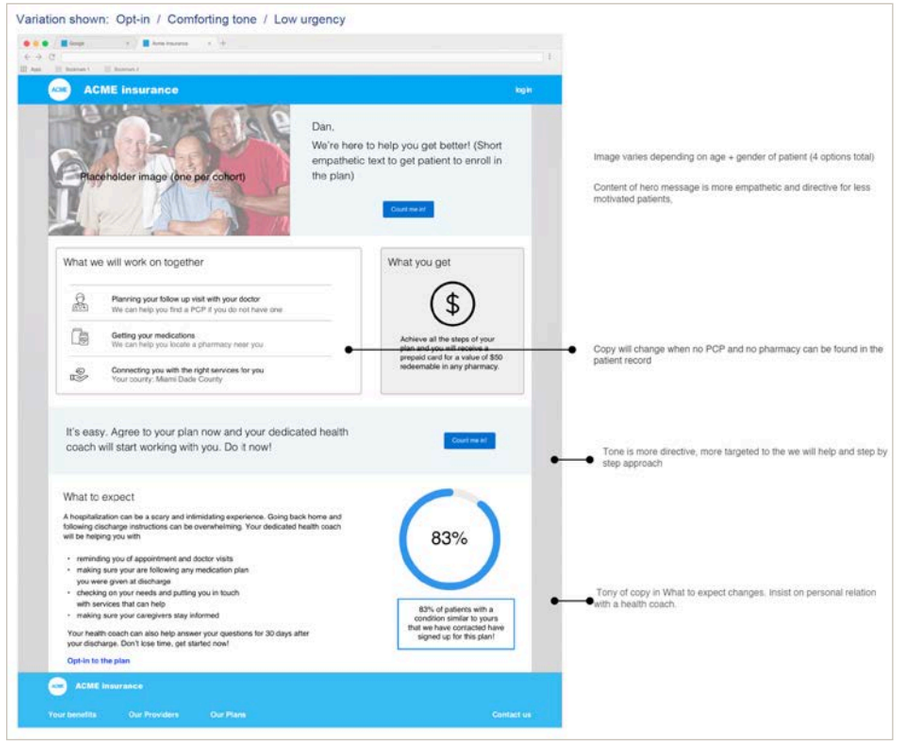
## User research synthesis: personas and user journeys



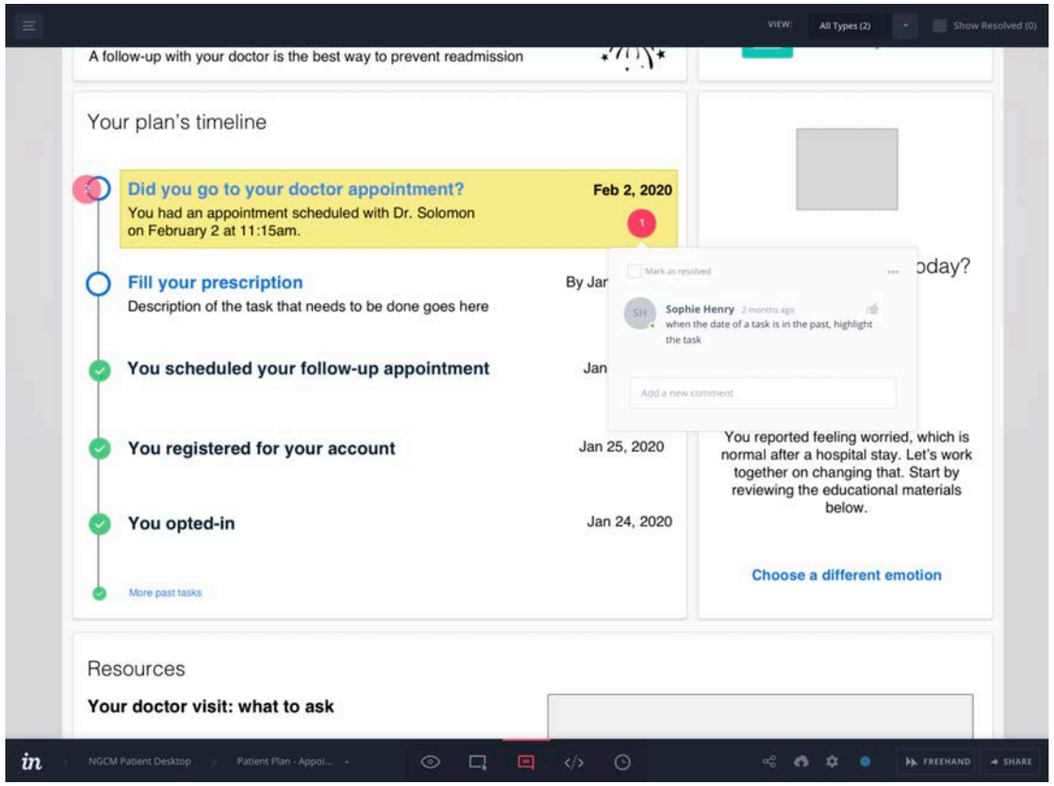

## Wireframes and flows



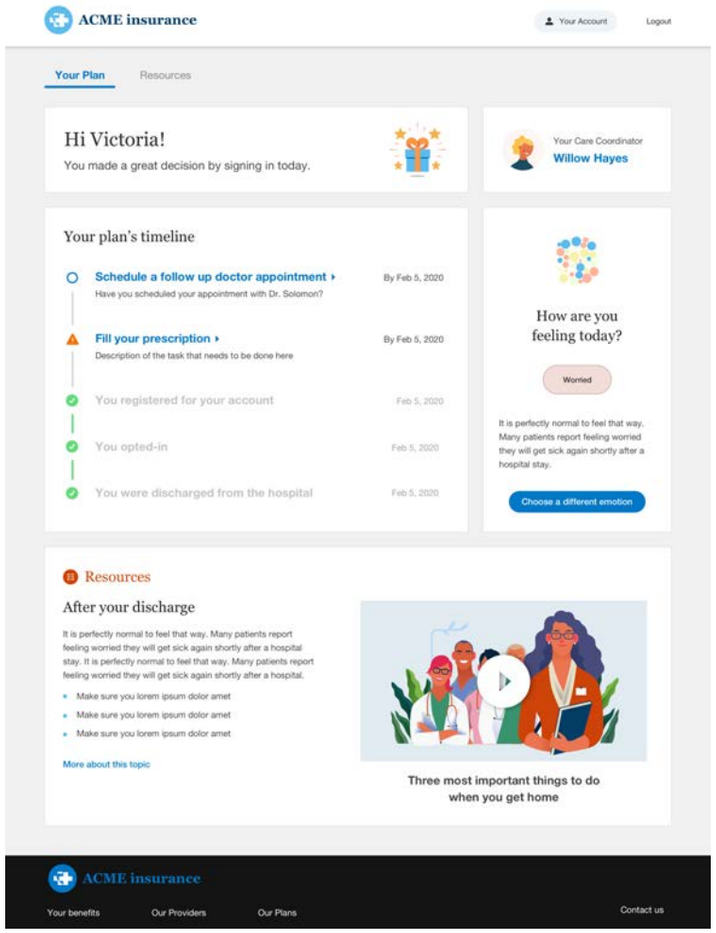



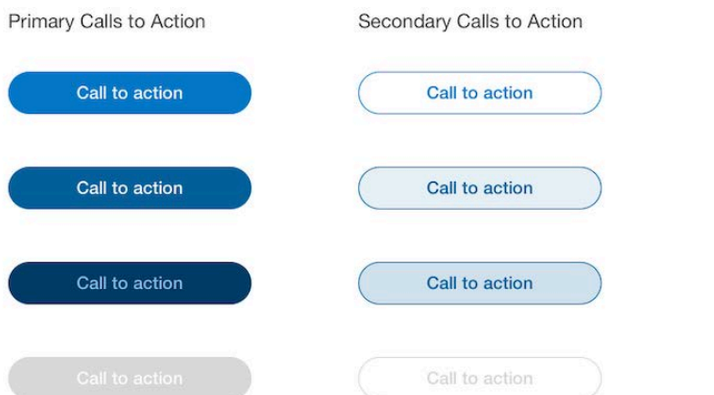
# CARE MANAGEMENT PLATFORM: DELIVERABLES

## Annotated InVision prototype(s) for designers and developers




## Visual designs, style guides and copy deck



# UNICEF

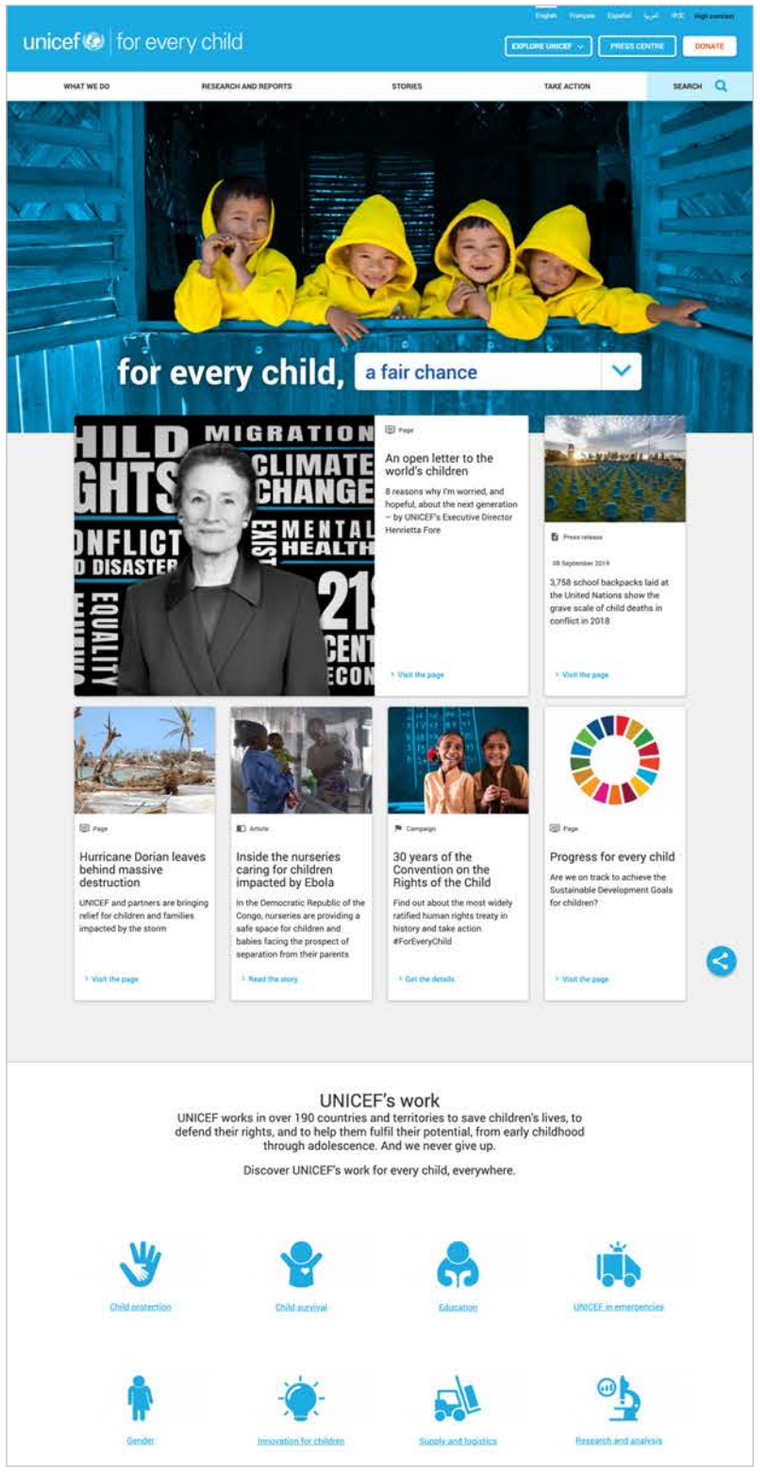
## Redesigning the user and content publishing experiences of the UNICEF website ecosystem

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 web 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, Drupal content types, and design modules
- With a team of ux and 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 and requirements developers and business owners could use
- I designed a navigation structure for the ecosystem that significantly simplified production and maintenance of content
- I trained the publishing team on how to use the final product

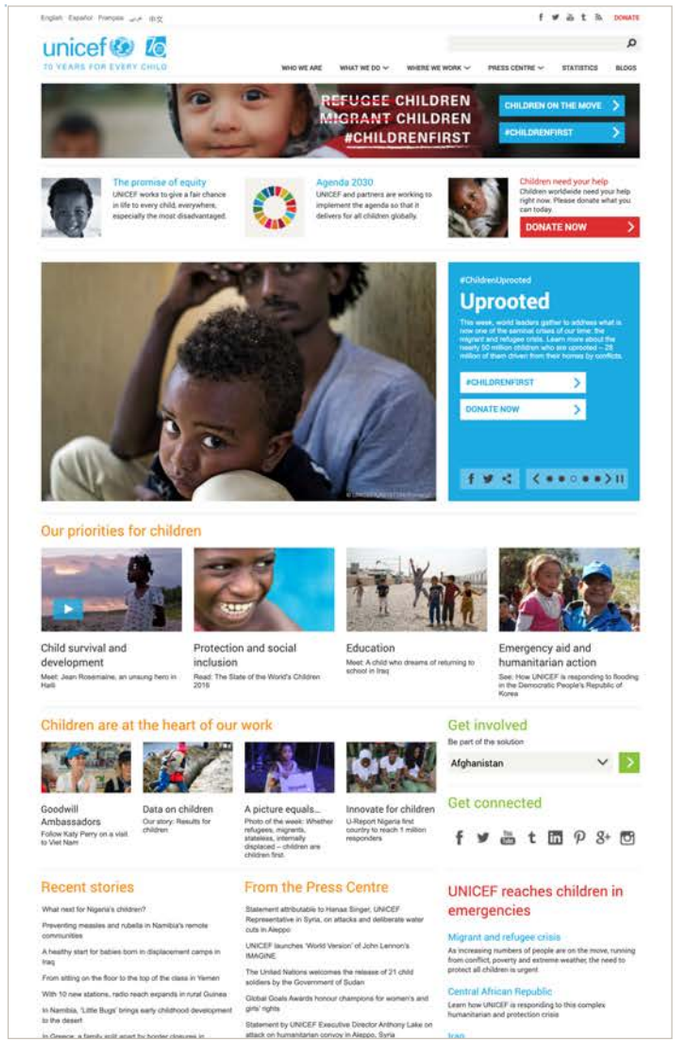
*What I learned:*

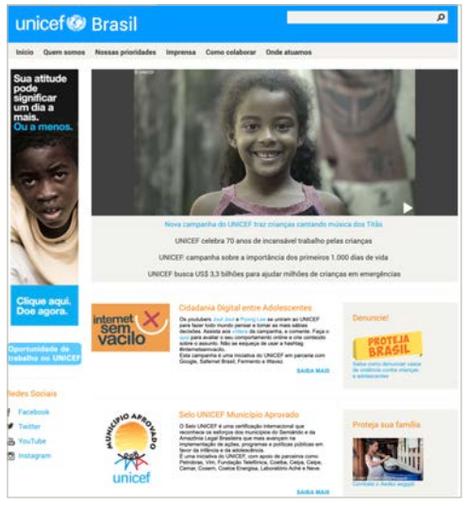
*Articulating the purpose of the product at every level (from concepts to design system components) was helpful to designers and clients*



# UNICEF: IMPACT

## From



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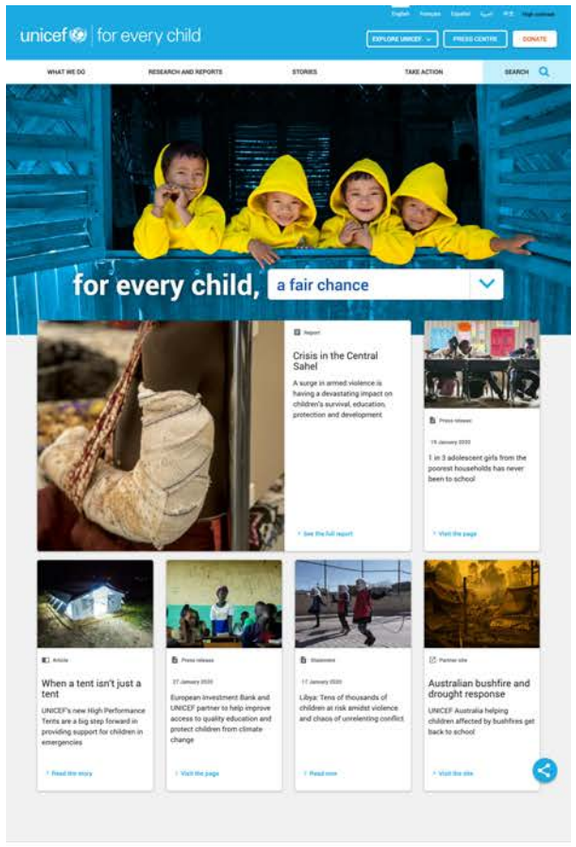
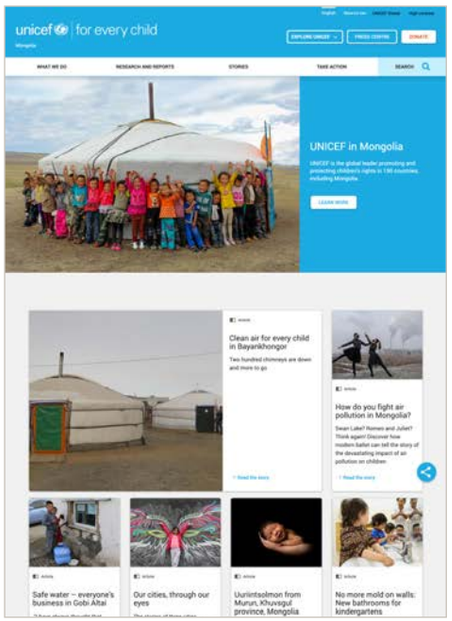
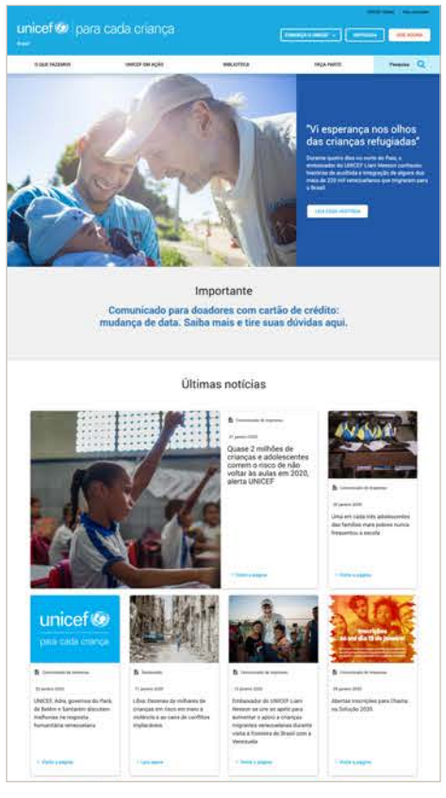
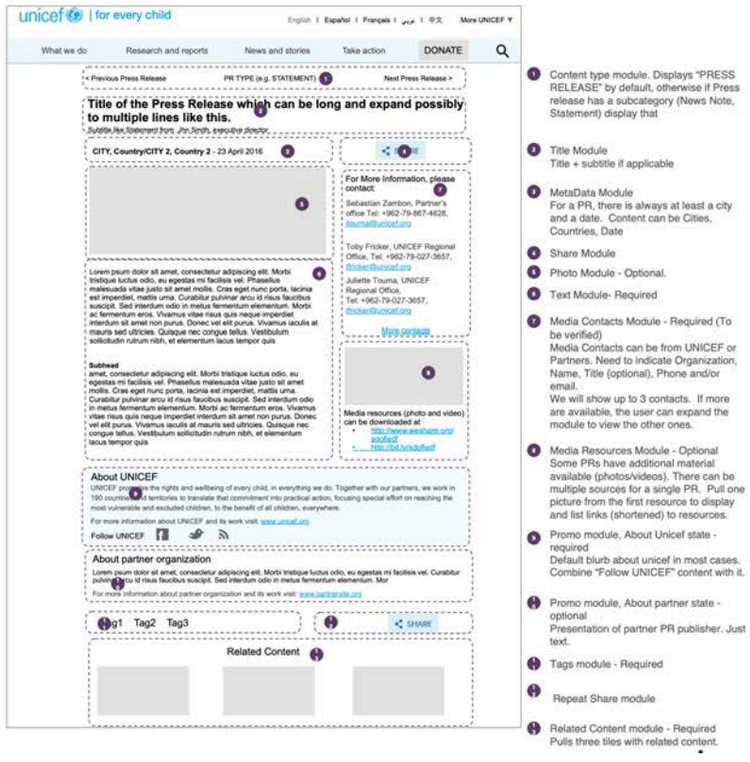




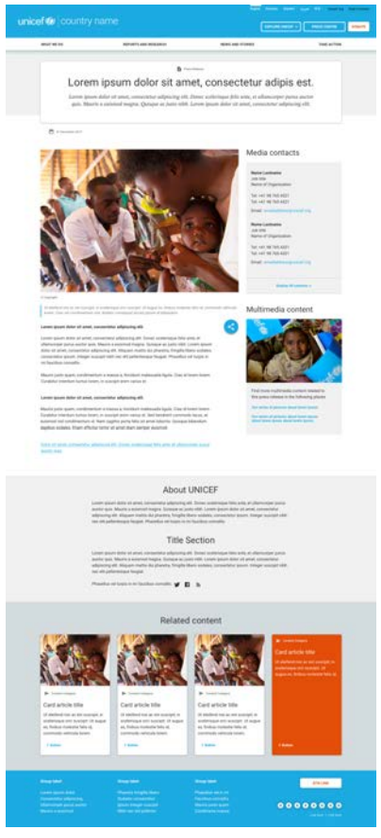



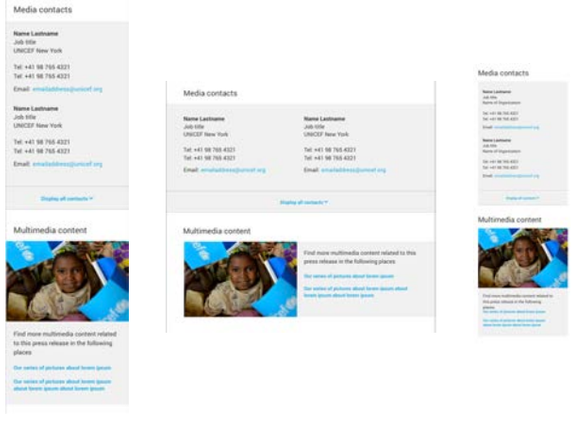
# UNICEF: DELIVERABLES

Annotated wireframes (for selected pages)




Design system components and page templates (in 3 screen sizes - desktop, tablet, mobile)




Functional specifications (user stories) for each template and component

**Press Release**

As a global or local content publisher, I need a page template so that I can publish a press release, with a hero image or video, who to contact, links to multimedia assets, about UNICEF content and link to related stories on the site.

# RMS

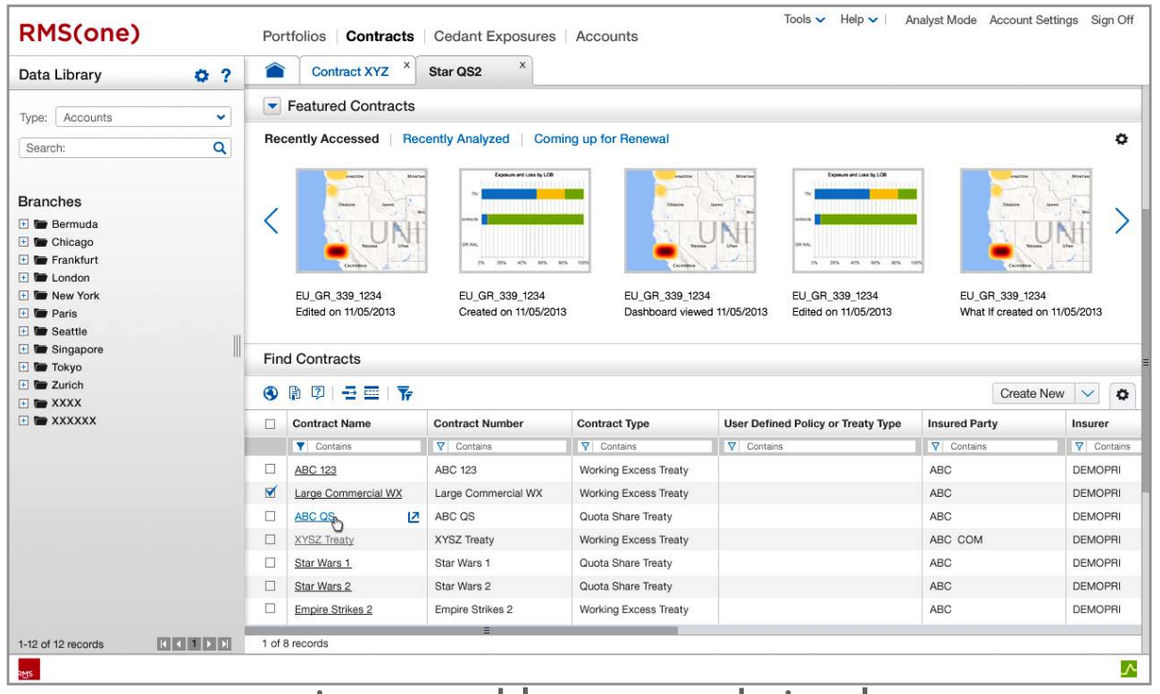
## Redesigning a data-intensive risk-management platform for insurance companies

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.

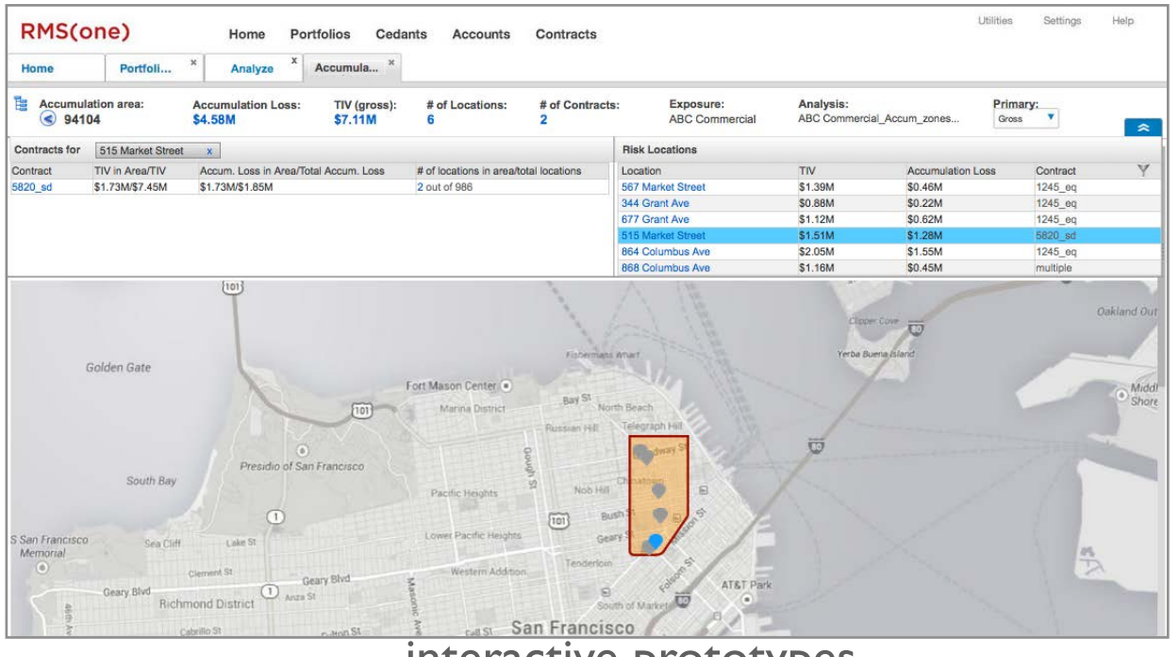
RMS originally wanted only a few key screens to be redesigned to simplify document management tasks. I worked on cleaner page layouts, introducing icons, and improving page-level usability. In parallel, I identified key navigational issues that undermined flow and task completion. Working closely with 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*

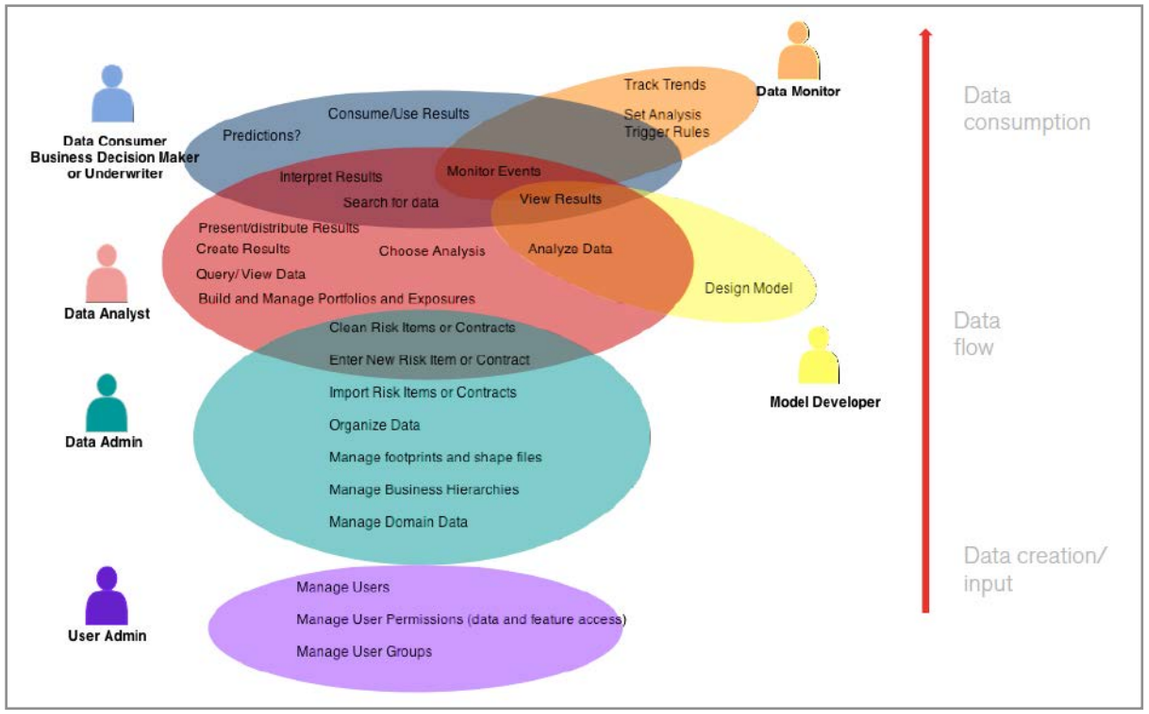



improved layouts and visuals



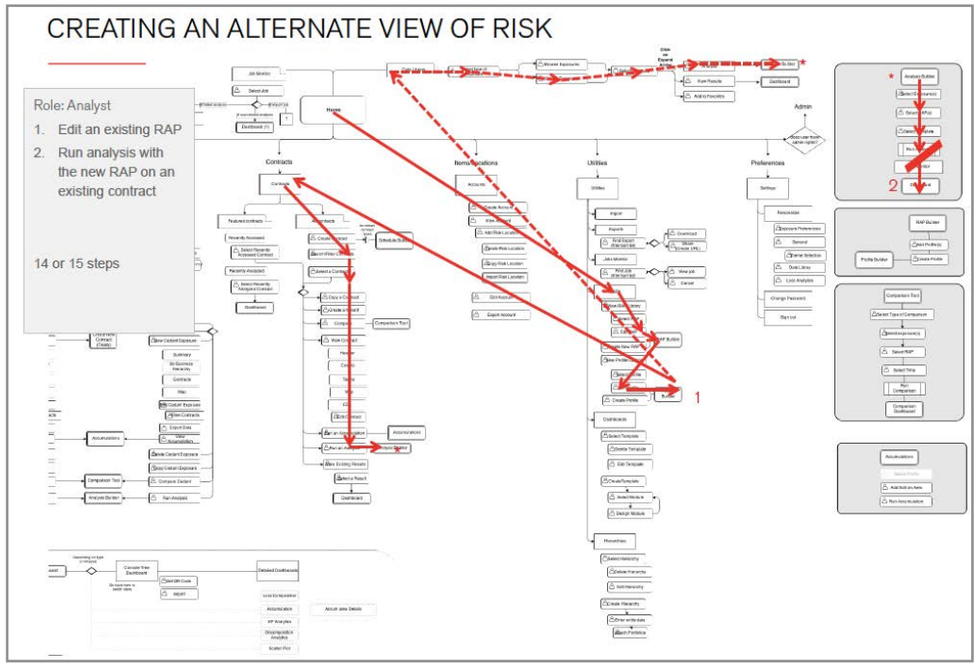

interactive prototypes

# RMS: ADDITIONAL DELIVERABLES




user role/task mapping

from

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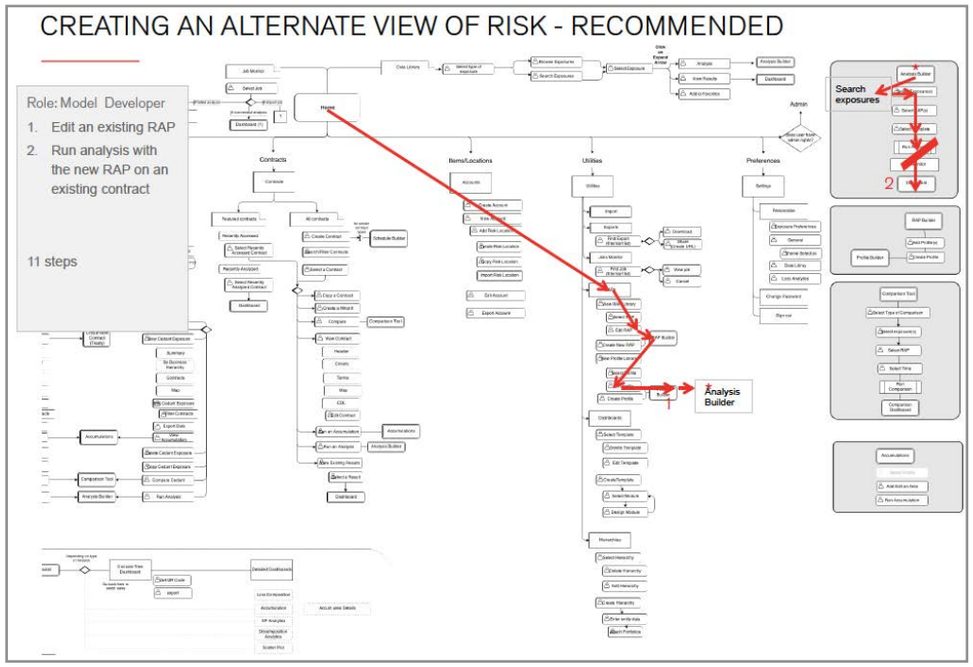
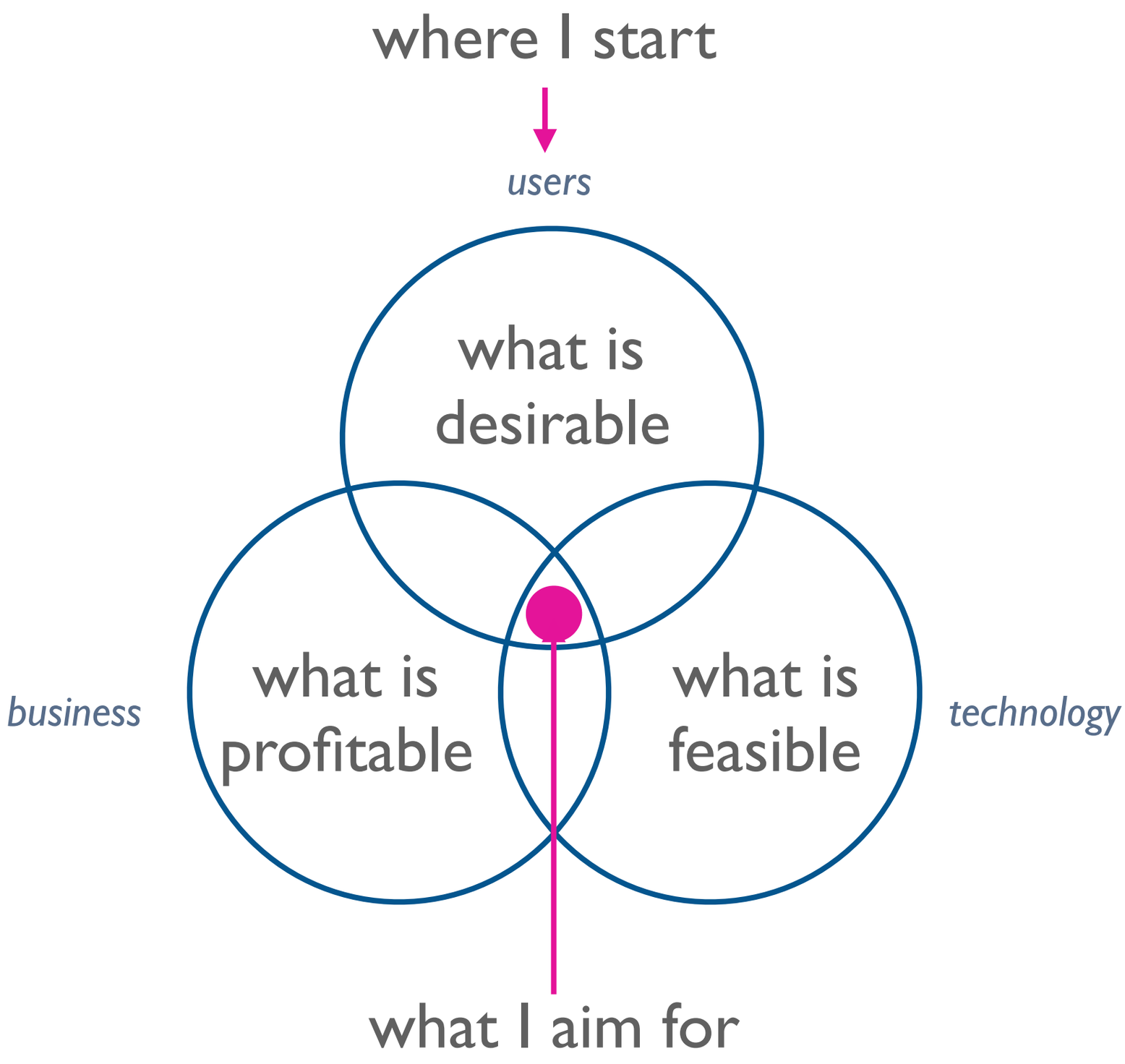



visualizations of improved user paths

# LEADERSHIP SKILLS

# DESIGN THINKING

Finding the sweet spot at the intersection of business, technology and what users want.



# 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 am passionate about bringing in the voice of the end-users and making sure they are at the center of the proposed solution
- I tailor different methods, workshops and activities to the team I am working with to ideate, prioritize, build empathy, or define challenges and align on a future vision

# USER RESEARCH

- Lead contextual inquiries, walkthroughs and one-on-one interviews. Synthesize results in Persona and Journeys
- Lead user, client and stakeholder interviews
- Prepare and analyze results of focus groups
- Write scripts and plan usability testing. Moderate usability testing sessions (in-person or remote)
- Performe heuristic evaluations and UI critiques
- Conduct competitive analyses
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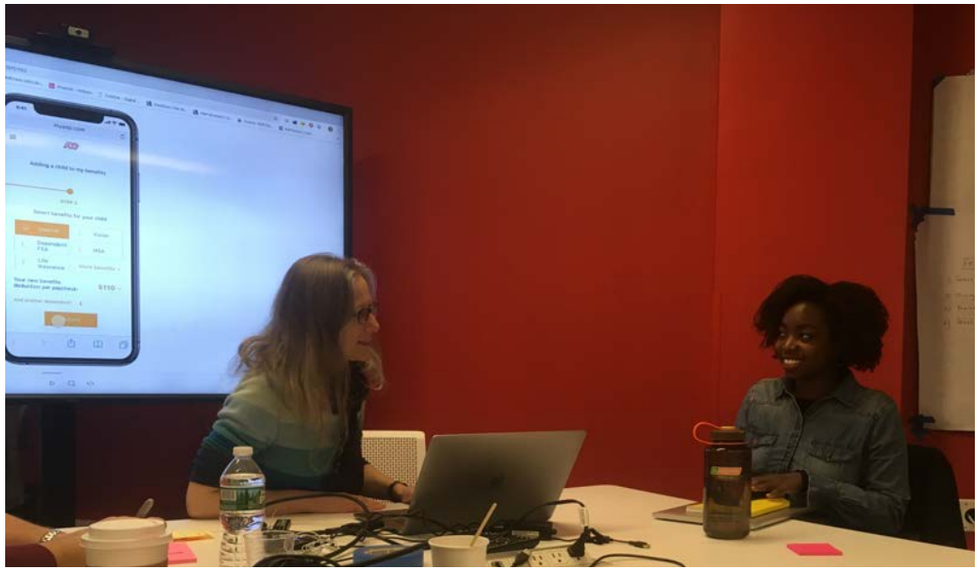
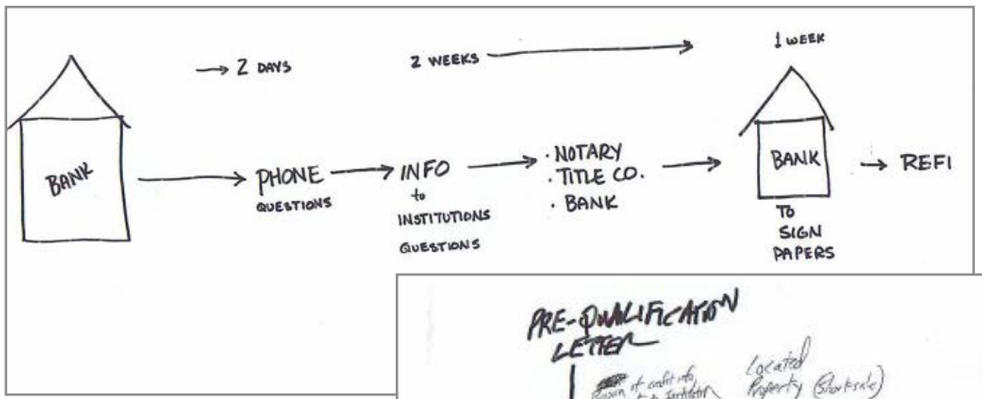
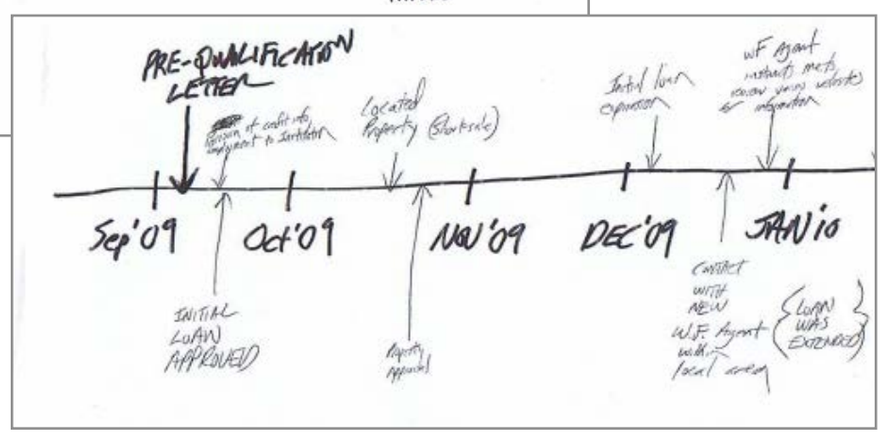


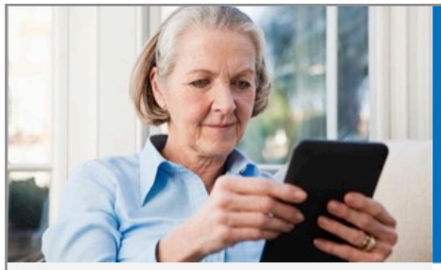
running concept tests




focus group participants' drawings of the refinance process

# 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.**

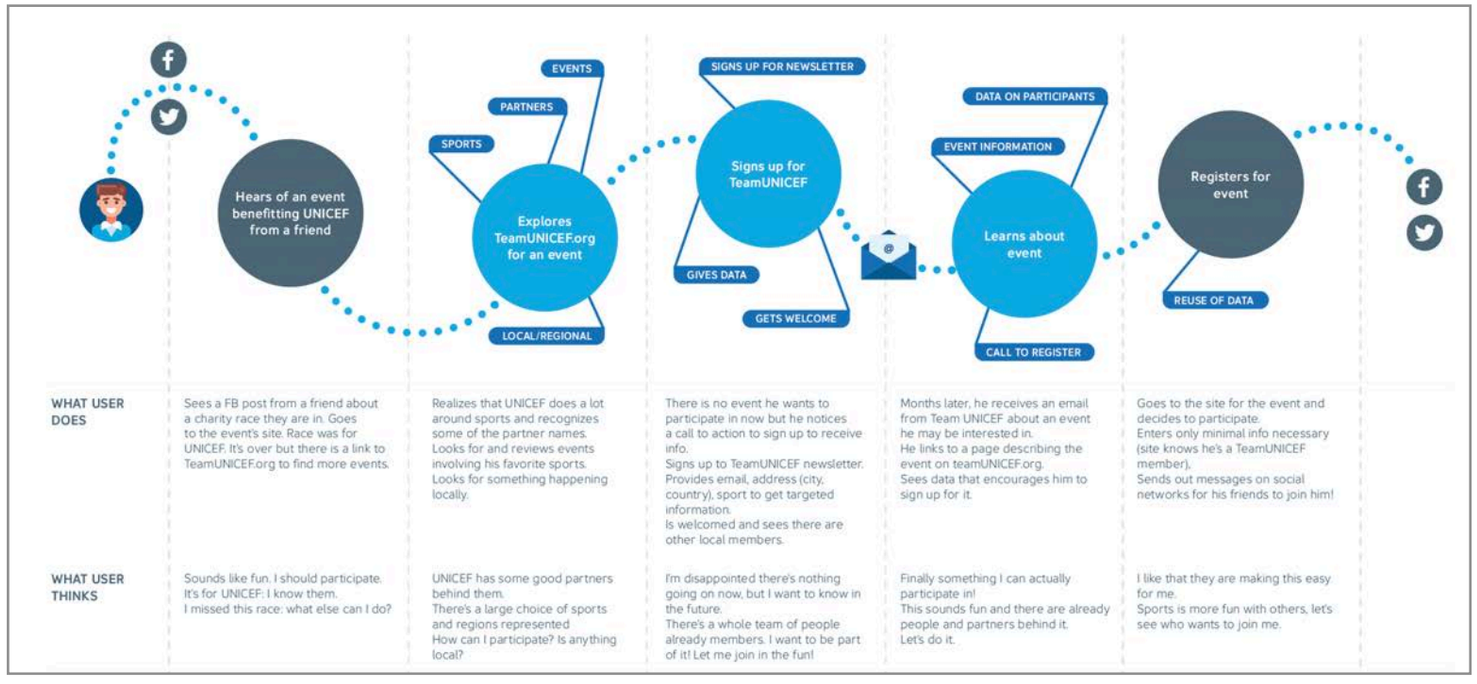
4

Allison

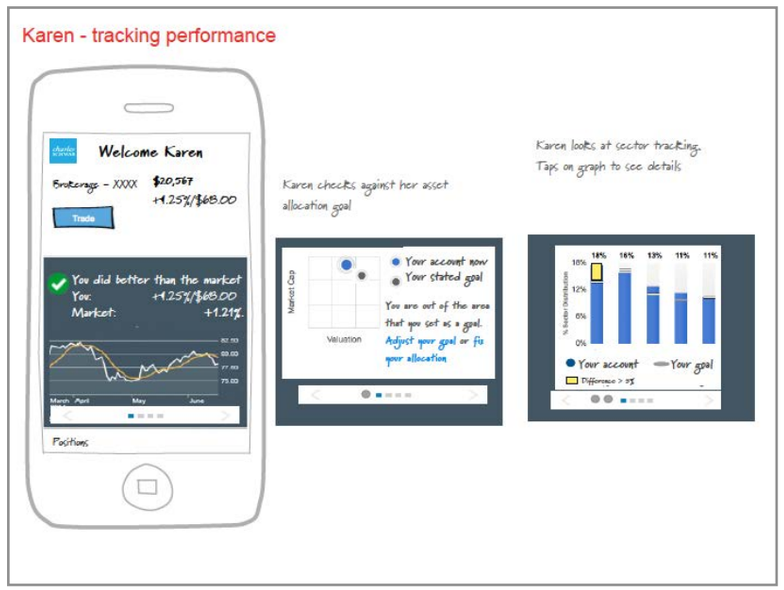
**Journey: Car Buyer considers a AUTO as replacement car (loan at dealership)**

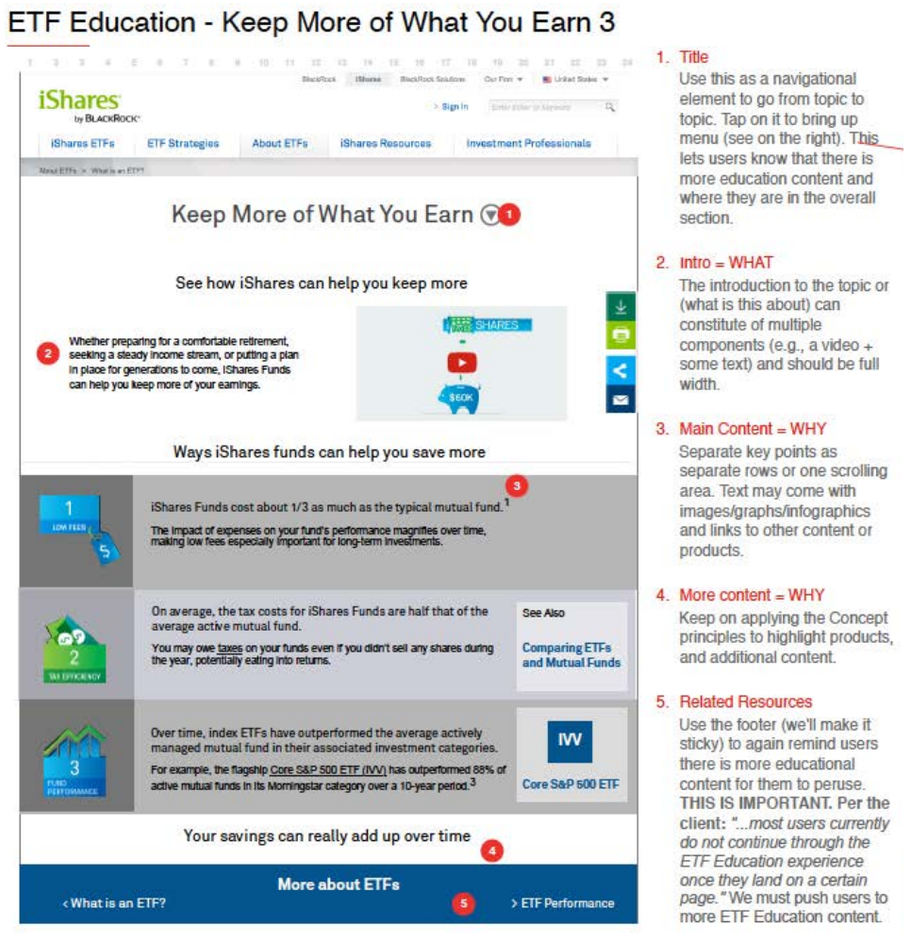
*"I want the dealership to treat me as an individual, not just as a person who has money to put out there, and get to know my story."*

| | 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? | • I like researching before making a purchase: it saves me time in the long run. Researching new cars becomes an evening project of mine<br>• I research products and brands online. I look at corporate citizenship and social impact of various car brands<br>• I use my network of friends, family, and coworkers.<br>• I do not research finance much in detail. I know I want to get a loan at the dealership<br>• I narrow down my options to a few models, including a AUTO | • I go to a AUTO dealership by myself. I'll consult with my husband by phone and text<br>• I make it clear I know I have good credit<br>• I test drive a few cars<br>• The dealer gives me information about tax rebates for hybrids that I was not aware of<br>• I make my choice of the car I want | • I ask to trade in my car, and the trade-in value is so low!<br>• Suddenly the dealer is telling me numbers that seem different and higher than I was told earlier<br>• I try to get them to bring the numbers down to my expectations. I tell them the terms I'd like<br>• 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<br>• This whole interaction turns me off and I walk out | • I end up walking out very disappointed and without the AUTO<br>• 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? | • 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<br>• 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<br>• **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 | • 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<br>• 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<br>• **I feel comfortable with this sales person.** He seems caring and thoughtful. He shares valuable knowledge | • 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?<br>• I keep hearing "I can't" and being given the long sheet of terms. They won't budge on the rate<br>• I don't like haggling. **This is a waste of my time. TThe dealer doesn't seem to be working with me** to make it work out.<br>• Why did they **wait so long** to give me a rate? Especially one this high…<br>• 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!<br>• I don't feel they are making enough of an effort | • I feel **disappointed**<br>• I am **frustrated**; this was a waste of time<br>• They could have done a lot more to try to sell me the car. I **really wanted it!**<br>• 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<br>• Looking back, I don't think that the AUTO salesperson was creative enough in meeting my needs |

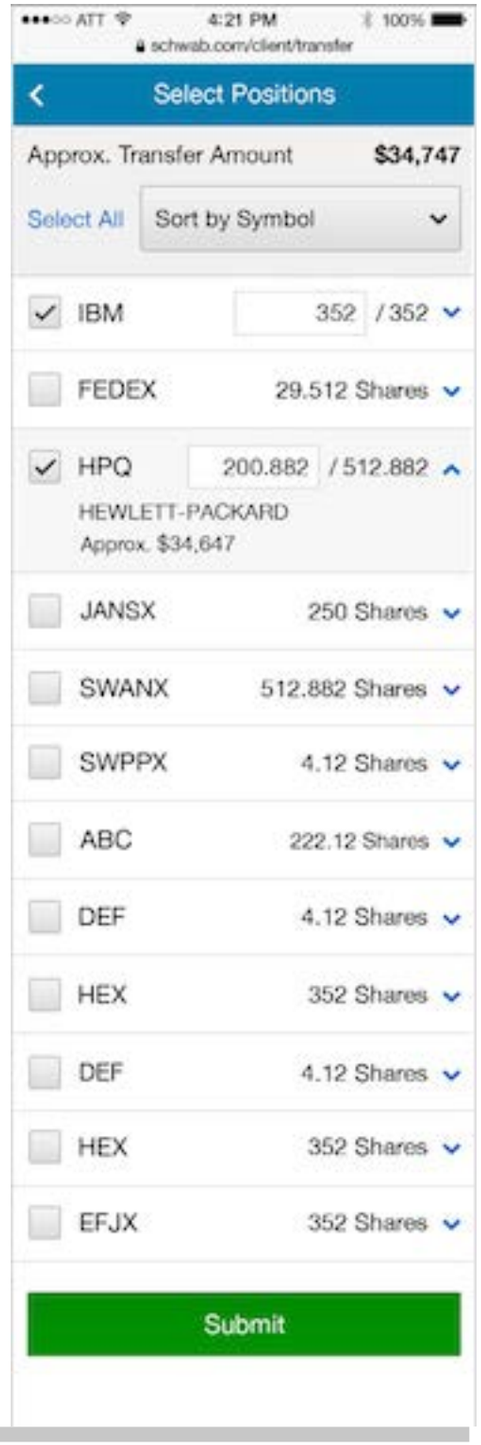


# UX & IA

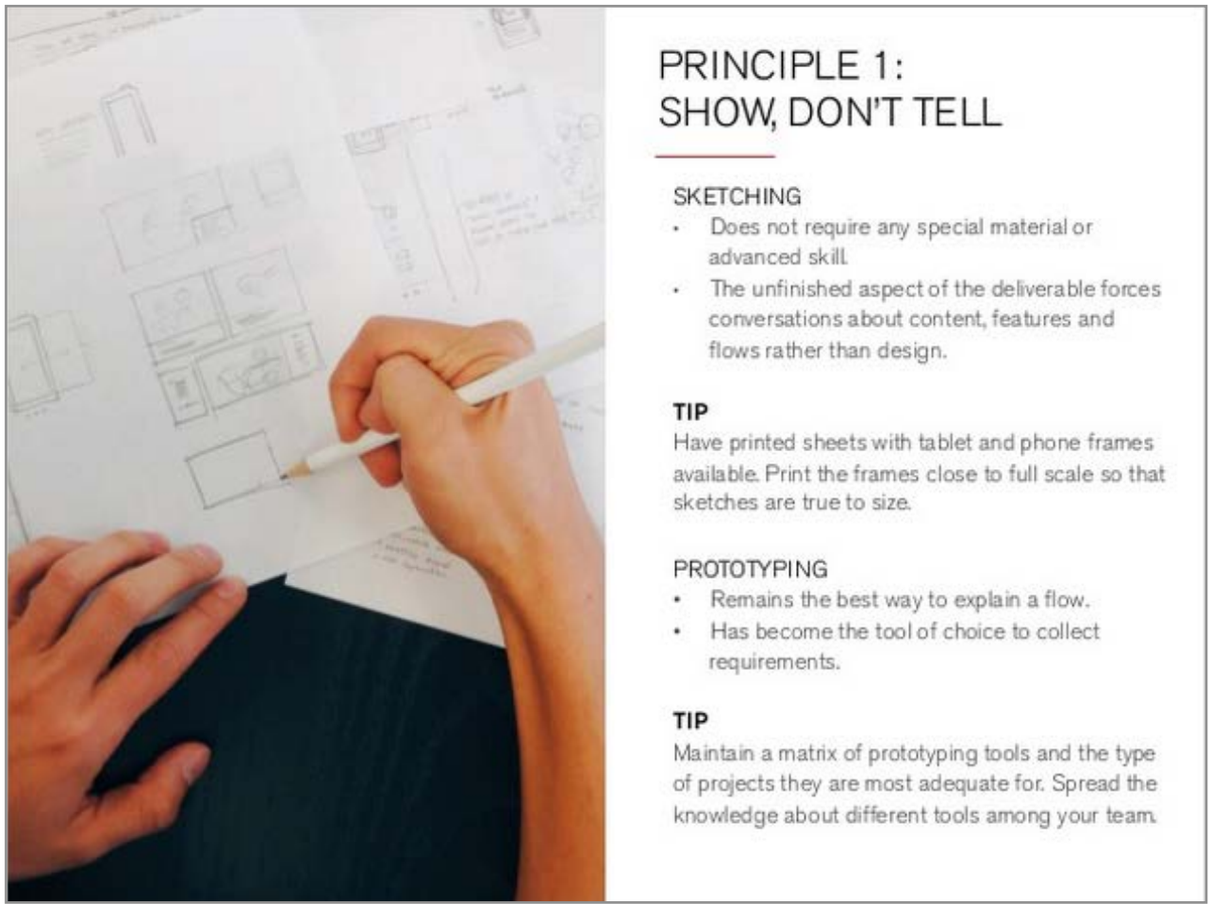



1. **Title**
   Use this as a navigational element to go from topic to topic. Tap on it to bring up menu (see on the right). This lets users know that there is more education content and where they are in the overall section.
2. **Intro = WHAT**
   The introduction to the topic or (what is this about) 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.



# PUBLICATIONS & TEACHING




- 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

- Active in Design Sprints Montreal group
- 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