

CHANGING BEHAVIOR

IDENTIFYING AND SOLVING USER'S PROBLEMS

a portfolio by Brett Sebbio

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Website

STERLING JEWELERS

KAY.COM, JARED.COM, KAYOUTLET.COM,
STERLINGJEWELERS.COM

HEADER REDESIGN

“The behavior you observe is the behavior you designed for –
whether intended or not.”

-BJ FOGG

ex·pe·ri·ence

ik^lspi(ə)rēəns/

noun

1. an event or occurrence that leaves an impression on someone.
"an enjoyable experience"

verb

1. encounter or undergo (an event or occurrence).
"the company is experiencing difficulties"

2. feel (an emotion).
"an opportunity to experience the excitement of New York"

Can we make it easier for our customers to find what they are looking for?



A NEW HEADER: REDUCING CONFUSION

With designing unique sites for each brand off the table, we needed to find the biggest win for our essentially identical sites, Kay.com and Jared.com.

After reviewing our critical problems, we narrowed our options to:

- Creating a new primary menu and taxonomy
- Changing the transactional flows and design (shopping card and credit payment)
- Creating a new navigational flow and design

Ultimately, we were allowed to test a new menu on another identical site that our IT team had been instructed to stand up, KayOutlet.com. This successful test allowed us to implement a redesigned header and menu for our two biggest brands, Kay and Jared.

INSIGHTS

- The marketing teams goal was to reduce cost by reducing the volume of calls to our customer service team
- We believed we could incrementally increase revenue by improving the findability of products through the primary navigation
- Our primary focus was to reduce the density of information in the header
- Our research indicated that people were having trouble finding things in several areas of our sites
- We prioritized: helping users find stores, finding the place to pay their credit card bills, improving the payment experience, and creating a true taxonomy that matched the mental model of our customers

MY CONTRIBUTIONS

Research

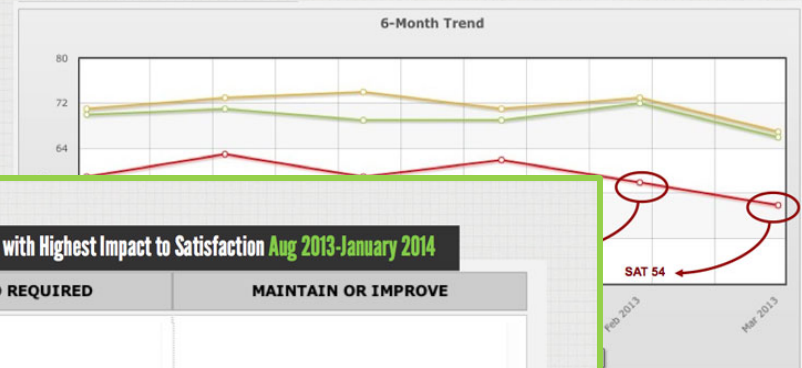
- Competitive Analysis
- Surveys
- Voice of Customer Studies
- Heuristic Reviews
- Search Log Analysis

User Task Modeling

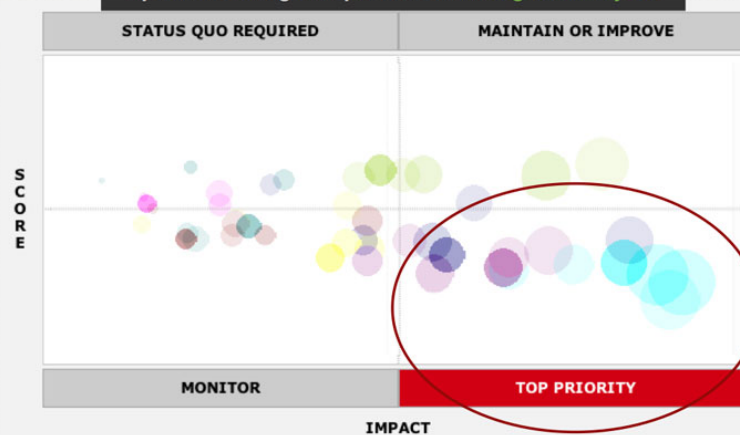
- Nomenclature Standardization
- Card Sorting

Key : : FTV Unable to Find

There is steep declining trend for first time visitors (FTV) **not being able to find** what they are looking for. March is down almost 10 points from the all time high one year ago (65, March 2012) and only one point higher than the all time low (53, September 2012).



Top Priorities with Highest Impact to Satisfaction Aug 2013-January 2014



Over the last 6-months the areas that are a top priority to improve customer experience **navigation, product browsing and functionality**.

MY CONTRIBUTIONS

Research

- Competitive Analysis
- Surveys
- Voice of Customer Studies
- Heuristic Reviews
- Search Log Analysis

User Task Modeling

- Nomenclature Standardization
- Card Sorting

Open-Ended Responses
Sterling Jewelers Browse
August 20, 2013 - November 20, 2013
Filter: [Sterling] Jared
Page Filter: No Filter

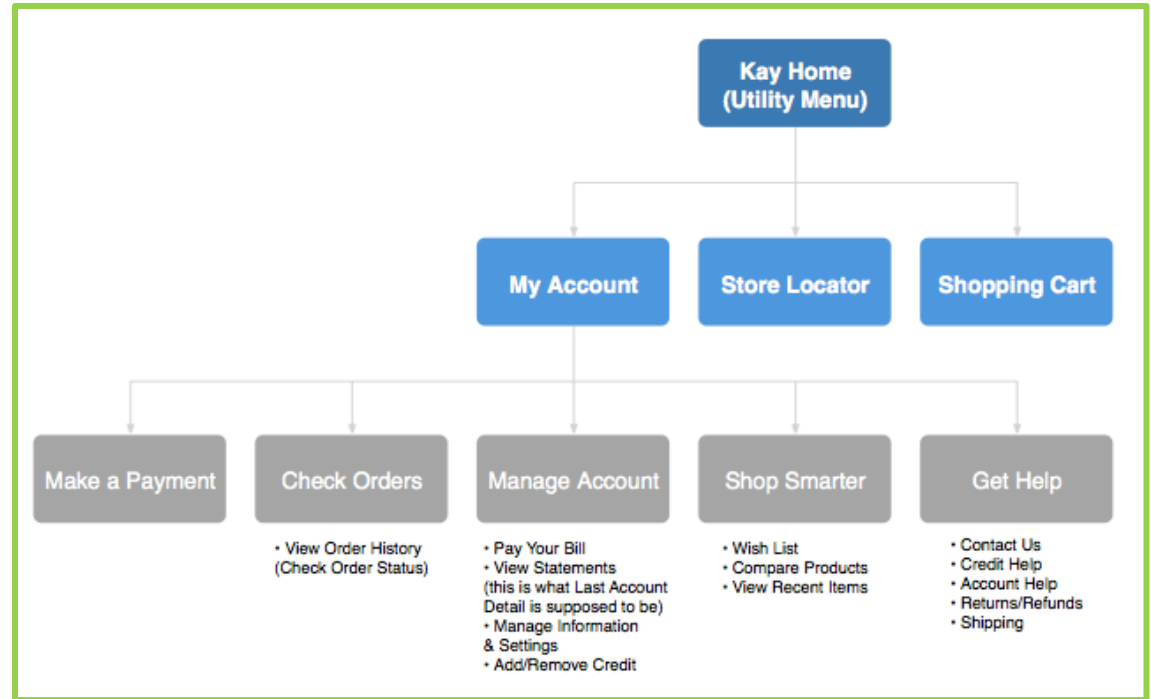
Date	Satisfaction Score	Please tell us the issue you experienced when managing your account today?	Session Replay Link
11/20/2013	44	Always difficult to get into account often difficult to get to site. Your log in information is screwy. Why if I have an account with you already, would you want me to go thru the process of providing all that information just to get web access? Why can't I get web access when I open the account? Also, there's a disconnect between retail input and billing. I've twice had to adjust the payment plan I signed up for, because the retailer in Columbia SC assumed me I was on an interest free for 12 mos plan, but you register me as a 22% interest rate customer and bill me as such until I squeak.	
11/19/2013	19	Finally, your on line draft system is broken. You ding me for a late payment, when you had the routing number and authorized it, then it turned out to be incorrect. You put my credit rating in jeopardy because of YOUR human error. And then you refused to fix it.	
11/15/2013	70	Can't save payment options	
11/12/2013	29	I have not logged on to the website. I tried to retrieve my username and password. I constantly received an error message.	
11/11/2013	48	need to input my checking information each time I want to pay my bill. the log in and password didn't work, called the 800# they couldn't help me said to re-register which I ended up doing what should have taken 10 min took 35 min not a very easy site to navigate	
11/10/2013	52	I always get the ERROR OCCURRED message. Then I click on accounts and move forward.	
11/09/2013	69	clicked on My account after registering and cannot get back to bill pay section	
11/02/2013	58	see comment below	
10/28/2013	26	Unable to view my statement using both IE and Firefox. Adobe plugins are working in both browsers, however, you had a popup telling me it apparently was not.	
10/28/2013	0	Error message when signing in. Always have to sign in multiple times.	
10/28/2013	0	The usual issue of the site being a pain in the butt to navigate to pay a bill. Further, it does not allow the use of a debit/credit card to pay, but requires the entry of banking info each time, it's unwieldy, frustrating and obnoxious. I hate it.	
10/27/2013	0	can't find link to pay for my overpriced purchase	
10/26/2013	63	every time I sign on I get an error message and I have to try signing on multiple times till it finally goes through.	
10/26/2013	0	I had a problem logging in for the last month and a half! This site seems to be the most troublesome one I have to make payments on. This was the last time I was going to use this site. I planned to cancel my card with Jared. The recurring payments option saved my account. I will probably not buy from your store in the near future because I am fairly certain that I will be faced with dealing with this site in the future and it now has caused my payment to be late. I am sure it will affect both my credit and the interest rate that I am paying on the account. I am carrying a very low balance right now so I may just pay it off and move over to Shane. They have told me that they will clean and warranty all of my sales jewelry that I have purchased from Jared.	
10/26/2013	0	You need to make managing account easier to find. Most pages have a spot that says something like "Make a payment" or "Pay my bill" very easy to find, you do not. I was in the store making a purchase in June and a young man was making a late payment in person because he could not find how to make a payment online. It is much to difficult to find.	
10/25/2013	0	I was setting up my debit account for my new silver account. My payment is due on 11/17/13. Before making a full payment I wanted to do a test transaction for \$1.50. The message that came across when I made the payment that since I was not making the minimum payment I would be charged a late fee. It is my intent to make the full payment well before the 11/17 date after I verified the test transaction.	
10/24/2013	74	I needed to make a payment. Site asked for bank account routing/account number twice (excessive) When I keyed in twice (identically) I kept stating that the numbers didn't match. I made a screen print - site was clearly not working properly. Good part was that it showed I'd made a telephone payment earlier this month. But action not satisfactory.	
10/23/2013	33	Want to change my address, says try later. Tried two weeks ago and said the same thing. @#\$@	
10/23/2013	67	I tried to make an online payment and received a technical error more than 3 times and was unable to make the payment online. Had to call customer service to make a phone payment.	
10/20/2013	37	logical statements and statements	
10/18/2013	89	It will always tell me that the site is not working. I have to keep coming back and trying and eventually it works.	
10/18/2013	4		
10/17/2013	44	entered # as a user friendly to pay the bill	
10/15/2013	56	YOU CAN NOT REGISTER A BANK ACCOUNT FOR THE account without making a payment	
10/14/2013	0	was unable to create account. had to use chrome because the site won't load in IE 10!!!	
10/14/2013	67	Finding pending payments	
		This site is terrible. Absolutely terrible. Crises people! Having to enter routing & account numbers	

Bill Pay Issue	Instances	% of Total	Bill Pay Issue	Instances	% of Total
Save Checking Account # / Payment info/Updated Info	21	20.2%	Save Checking Account # / Payment info/Updated Info	14	19.2%
Can't reset password or Won't take current pw/forced expiration	17	16.3%	Can't reset password or Won't take current pw/forced expiration	17	23.3%
Use CC or Refuse to Give Bank Acct. #/SSN	8	7.7%	Use CC or Refuse to Give Bank Acct. #/SSN	0	0.0%
Trouble registering for credit	3	2.9%	Trouble registering for credit	1	1.4%
Took wrong \$ amount from my bank or didn't process or double pay	4	3.8%	Took wrong \$ amount from my bank or didn't process or double pay	3	4.1%
More Kay CC Account Info (statement)	3	2.9%	More Jared CC Account Info (statement)	0	0.0%
Verify Computer?	1	1.0%	Verify Computer?	0	0.0%
Mobile.Tablet Bill Pay	12	11.5%	Mobile.Tablet Bill Pay	5	6.8%
Can't find where to make payment or Too Many Steps	7	6.7%	Can't find where to make payment or Too Many Steps	14	19.2%
Input/Technical Bugs	7	6.7%	Input/Technical Bugs	7	9.6%
Scheduling Payments	6	5.8%	Scheduling Payments	1	1.4%
PDF Statement	3	2.9%	PDF Statement	2	2.7%
Don't know Acct #	3	2.9%	Don't know Acct #	0	0.0%
Site Performance or Down	5	4.8%	Site Performance or Down	8	11.0%
Employees Did Not Respect Privacy (Phone Calls) - Tech Bug?	4	3.8%	Employees Did Not Respect Privacy (Phone Calls) - Tech Bug?	1	1.4%
	104			73	

MY CONTRIBUTIONS

Information Architecture

- User Flows
- Sitemaps
- Proposed Taxonomy
- Updated Navigation
- Updated Mega Menu



Rings	Necklaces & Pendants	Earrings	Bracelets	Watches	Accessories	Wedding	Collections	Clearance
Engagement	Heart	Hoops	Fashion	Fashion	Charms	Engagement Rings	The Leo Diamond	Clearance
Wedding	Cross	Studs	Tennis	Dress	Cuff Links	Design-A-Ring	Neil Lane Bridal	Previously Owned
Anniversary	Fashion	Drop	Bangle and Cuff	Sport	Money Clips	Bridal Sets	Open Hearts by Jane Seymour	
Promise	Chains	Fashion	Charm	Chronograph	Key Chains	Wedding Bands	Love's Embrace	
Fashion	Locketts		Ankle		Tie Bars	Anniversary Rings	LeVian	
Mother's					Knives/Multi-Tools	Promise Rings	Charmed Memories	
Couple's					Pins	Ring Settings	Neil Lane Designs	
Stackable					Jewelery Boxes		Shades of Wonder	
Class					Tattoos		Personalized Jewelry	
DAR								

MY CONTRIBUTIONS

Information Architecture

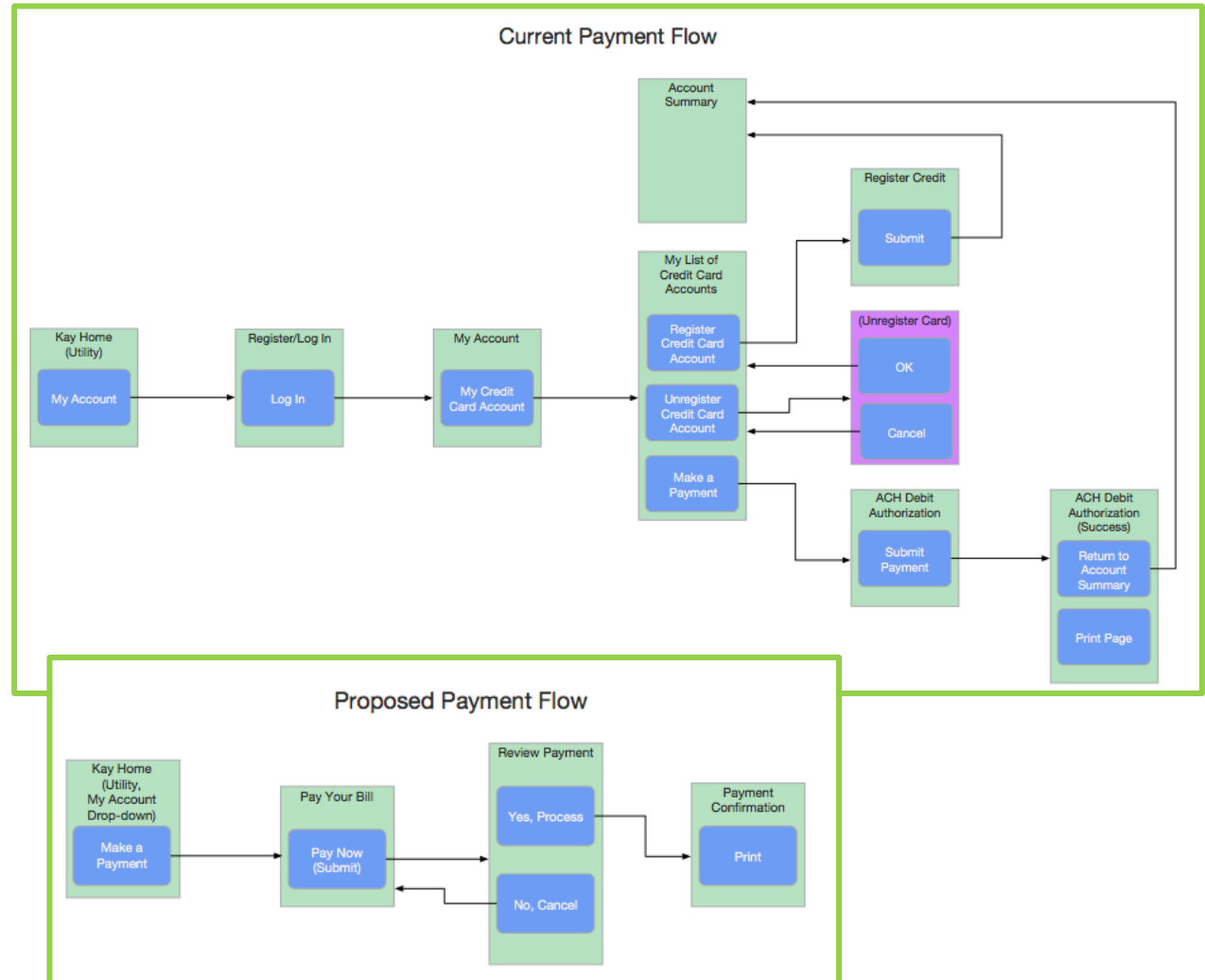
- User Flows
- Sitemaps
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Style vs. Type??	Engagement Rings	Wedding Rings (Bands)	Anniversary Rings	Fashion Rings	Stackable Rings	Promise Rings	Toe Rings	Personalized Rings	Class/Fraternal Rings
Style	Solitaire Rings 3 Stone Rings Halo Rings Side Stone Channel Set Pave Vintage Inspired Wedding Sets Semi-Mount Only	Enhancer Rings Wrap Rings		Animal Heart Rings Infinity Rings Religious Rings Birthstone Rings Claddagh Rings Letters & Numbers Nature Zodiac	Animal Heart Rings Infinity Rings Religious Rings Birthstone Rings Claddagh Rings Letters & Numbers Nature Zodiac	Heart Rings Infinity Rings	Animal Heart Rings Infinity Rings Religious Rings Birthstone Rings Claddagh Rings Letters & Numbers Nature Zodiac	Couples Rings Mothers Rings Engraveable Only Ambram Rings	
Price Range	\$0-\$100 \$101-\$250 \$251-\$500 \$501-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$9,999 \$10,000+	\$0-\$100 \$101-\$250 \$251-\$500 \$501-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$9,999 \$10,000+	\$0-\$100 \$101-\$250 \$251-\$500 \$501-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$9,999 \$10,000+	\$0-\$100 \$101-\$250 \$251-\$500 \$501-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$9,999 \$10,000+	\$0-\$100 \$101-\$250 \$251-\$500 \$501-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$9,999 \$10,000+	\$0-\$100 \$101-\$250	\$0-\$100 \$101-\$250 \$251-\$500	\$0-\$100 \$101-\$250 \$251-\$500 \$501-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$9,999 \$10,000+	\$0-\$100 \$101-\$250 \$251-\$500 \$501-\$1,000 \$1,001-\$2,500 \$2,501-\$5,000 \$5,001-\$9,999 \$10,000+
Mounting	Completed Ring Semi-Mount Only								
Stone Type	Diamond	Diamond	Diamond	Agate Alexandrite Amethyst Aquamarine Aventurine Birthstone Chalcedony Citrine Crystal Diamond Emerald Garnet Jade Mother Of Pearl Onyx Opal Pearl Peridot Quartz Rhodolite Ruby Sapphire Spinel Swarovski Elements Swarovski Topaz Tanzanite Topaz Tourmaline Tsavorite Turquoise Zircon	Agate Alexandrite Amethyst Aquamarine Aventurine Birthstone Chalcedony Citrine Crystal Diamond Emerald Garnet Jade Mother Of Pearl Onyx Opal Pearl Peridot Quartz Rhodolite Ruby Sapphire Spinel Swarovski Elements Swarovski Topaz Tanzanite Topaz Tourmaline Tsavorite Turquoise Zircon	Agate Alexandrite Amethyst Aquamarine Aventurine Birthstone Chalcedony Citrine Crystal Diamond Emerald Garnet Jade Mother Of Pearl Onyx Opal Pearl Peridot Quartz Rhodolite Ruby Sapphire Spinel Swarovski Elements Swarovski Topaz Tanzanite Topaz Tourmaline Tsavorite Turquoise Zircon	Agate Alexandrite Amethyst Aquamarine Aventurine Birthstone Chalcedony Citrine Crystal Diamond Emerald Garnet Jade Mother Of Pearl Onyx Opal Pearl Peridot Quartz Rhodolite Ruby Sapphire Spinel Swarovski Elements Swarovski Topaz Tanzanite Topaz Tourmaline Tsavorite Turquoise Zircon	Agate Alexandrite Amethyst Aquamarine Aventurine Birthstone Chalcedony Citrine Crystal Diamond Emerald Garnet Jade Mother Of Pearl Onyx Opal Pearl Peridot Quartz Rhodolite Ruby Sapphire Spinel Swarovski Elements Swarovski Topaz Tanzanite Topaz Tourmaline Tsavorite Turquoise Zircon	Agate Alexandrite Amethyst Aquamarine Aventurine Birthstone Chalcedony Citrine Crystal Diamond Emerald Garnet Jade Mother Of Pearl Onyx Opal Pearl Peridot Quartz Rhodolite Ruby Sapphire Spinel Swarovski Elements Swarovski Topaz Tanzanite Topaz Tourmaline Tsavorite Turquoise Zircon
Stone Color	Black Blue Brown Green White Yellow	Black Blue Brown Green White Yellow	Black Blue Brown Green White Yellow	Black Blue Brown Golden Gray Green Orange Pink Purple Red Smoky White Yellow	Black Blue Brown Golden Gray Green Orange Pink Purple Red Smoky White Yellow	Black Blue Brown Golden Gray Green Orange Pink Purple Red Smoky White Yellow	Black Blue Brown Golden Gray Green Orange Pink Purple Red Smoky White Yellow	Black Blue Brown Golden Gray Green Orange Pink Purple Red Smoky White Yellow	Black Blue Brown Golden Gray Green Orange Pink Purple Red Smoky White Yellow
Stone Shape	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald	Round Princess Emerald Heart Oval Pear Radiant Cushion Marquise Square Emerald

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Information Architecture

- User Flows
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- Updated Mega Menu

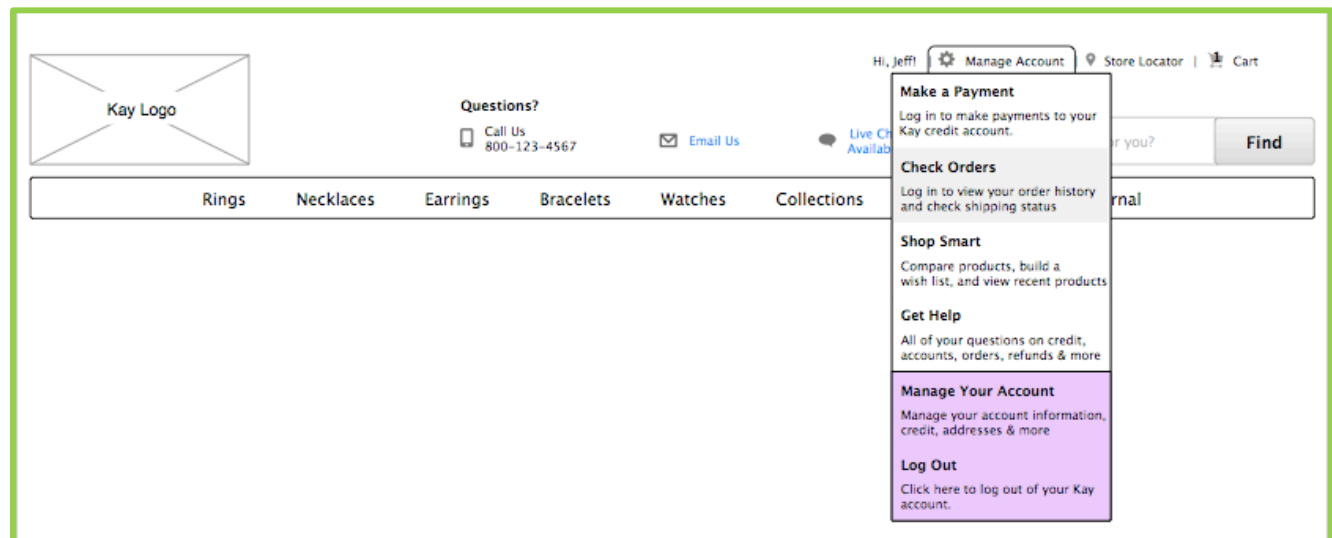
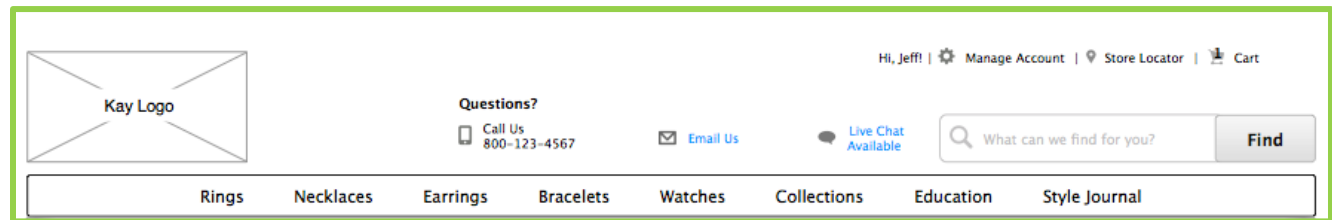


MY CONTRIBUTIONS

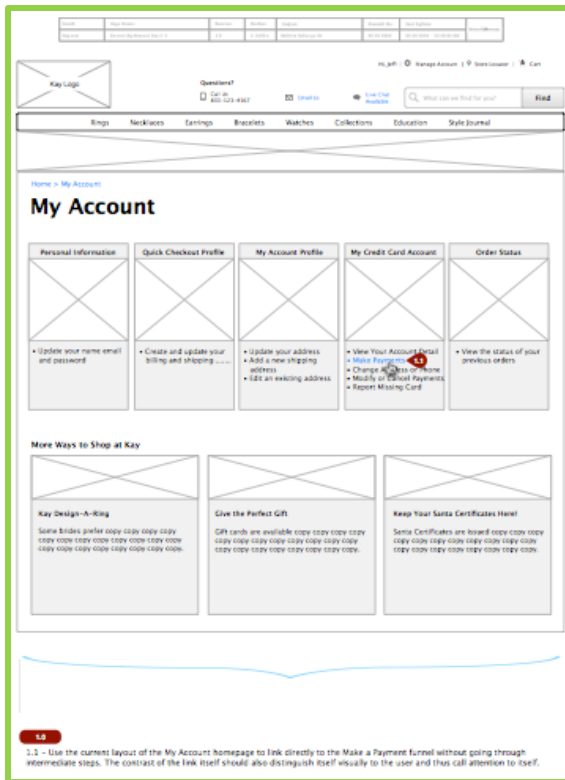
Interaction Design

- Sketches
- Header, Navigation, and Utility Menu Wireframes
- My Account Wireframes

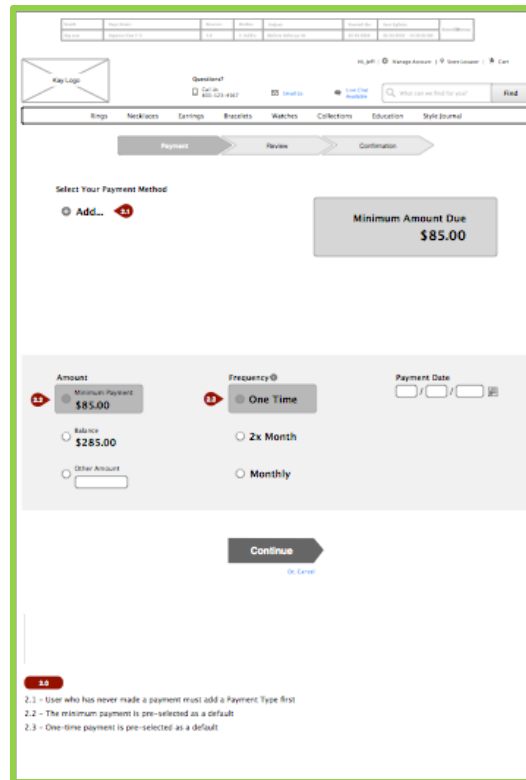
A/B Testing QA



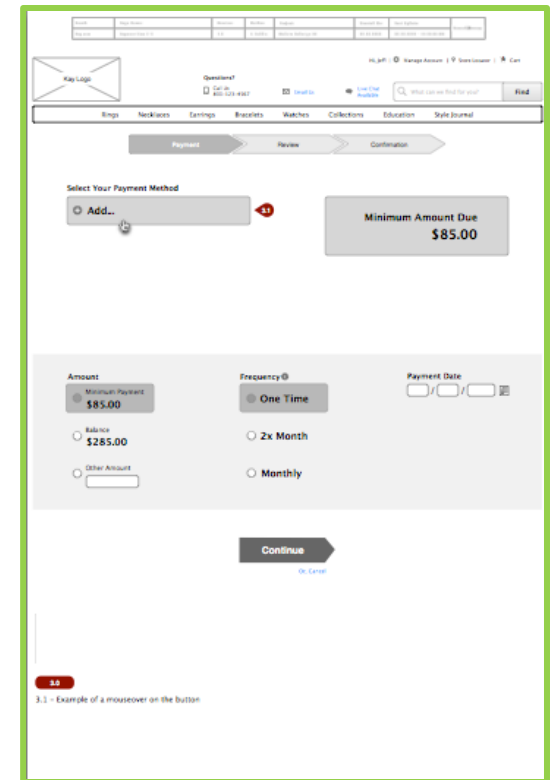
MY CONTRIBUTIONS



Make a Payment 01



Make a Payment 02



Make a Payment 03

1.0
1.1 - Use the current layout of the My Account homepage to link directly to the Make a Payment funnel without going through intermediate steps. The contrast of the link itself should also distinguish itself visually to the user and thus call attention to itself.

2.0
2.1 - User who has never made a payment must add a Payment Type first
2.2 - The minimum payment is pre-selected as a default
2.3 - One-time payment is pre-selected as a default

3.0
3.1 - Example of a mousedown on the button

MY CONTRIBUTIONS

4.1 - Example of a click on the button, will change to selected state and open flyout

Make a Payment 04

5.1 - Click the Checking tab to switch from adding a credit card to a checking account.

Make a Payment 05

6.1 - Enter your name into the form field.
 6.2 - Enter your account number into the form field.
 6.3 - Enter your routing number into the form field.
 6.4 - Enter your last 4 digits of your SSN into the form field.
 6.5 - Click the 'Add' button to save and add this information - which closes the flyout (slide closes), replaces the 'Add...' with a label that identifies the account, and adds a new 'Add...' button below.

Make a Payment 06

MY CONTRIBUTIONS

7.2 - The Financial Institution can be determined by the routing number.

Make a Payment 07

8.1 - Click to change the frequency to 2x Month (same hover and click animation as 3.1 and 4.1)

Make a Payment 08

9.1 - Click this icon to open a date picker to select the payment date

Make a Payment 09

MY CONTRIBUTIONS

10.1 - Type in dates, OR
10.2 - Select first payment date
10.3 - Select second payment date

Make a Payment 10

11.1 - Click to continue to Review the payment [schedule].

Make a Payment 11

MY CONTRIBUTIONS

Account: Kay Jewelers | Address: 1234 Main St | City: Akron, OH | State: OH | Zip: 44308 | Phone: 330.456.7890 | Email: info@kay.com

Questions? Call Us: 800.123.4567 | Email Us | Live Chat

Navigation: Rings | Necklaces | Earrings | Bracelets | Watches | Collections | Education | Style Journal

Progress: Payment → Review → Confirmation

Warning: By clicking "Make Payment" you agree to have payments of \$85.00 charged to your account ending in xx9876 beginning on 3/8/2014. You agree to pay \$85.00 twice per month repeating on the dates selected until your credit balance reaches zero. If your balance is less than \$85.00 you will only be charged that amount.

The payment will be identified as "Kay Jewelers, Akron, OH" on your statement.

Payments before 11:00pm will post to your account today. Payments made after 11:00pm will post to your account the next business day.

You can revoke authorization for this payment by using kay.com or calling 1-800-877-3616.

You cannot cancel a payment after it has been initiated by your financial institution.

Payment Summary

Amount: **\$85.00**

Payment Type: **Bank Account** xx9876

Date: **3/8/2014**

Frequency: **2x Month**, starting 3/8/2014

Make Payment

12.1 - Clicking "Make a Payment" will process the payment and move the user to the Confirmation page

Make a Payment 12

Account: Kay Jewelers | Address: 1234 Main St | City: Akron, OH | State: OH | Zip: 44308 | Phone: 330.456.7890 | Email: info@kay.com

Questions? Call Us: 800.123.4567 | Email Us | Live Chat

Navigation: Rings | Necklaces | Earrings | Bracelets | Watches | Collections | Education | Style Journal

Progress: Payment → Review → Confirmation

Success! Thanks for making your payment. This page is for your reference only, it is not a legal document. We look forward to you visiting us again!

Payment Summary

Amount: **\$85.00**

Payment Type: **Bank Account** xx9876

Date: starting **3/8/2014**

Confirmation Number: **0002349567345982345**

Account Number: **0123456789**

Print | **Credit Center** | **Manage Account**

Recently Viewed

13.1 - Clicking "Print" will print the Confirmation Page

13.2 - Clicking "Credit Center" will take the user to the Credit Center (Manage Credit)

13.3 - Clicking "Manage Account" will take the user to the My Account section (Manage Account)

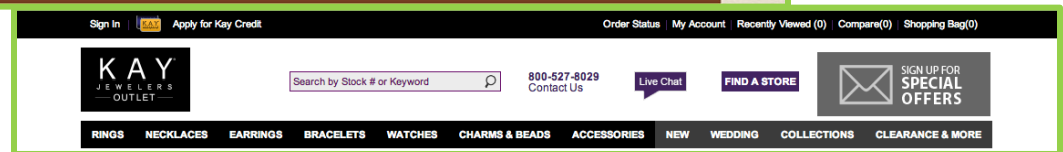
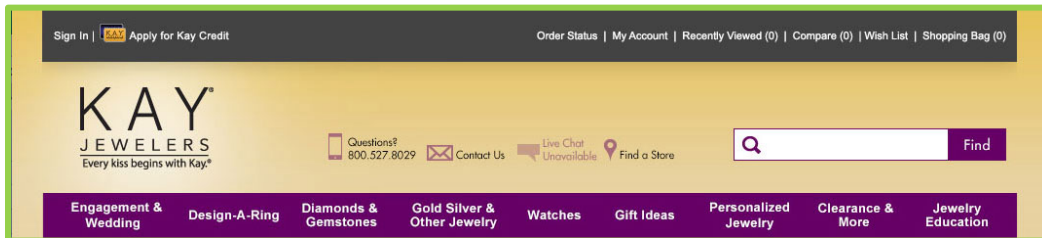
Make a Payment 13

RESULTS

Before - Kay



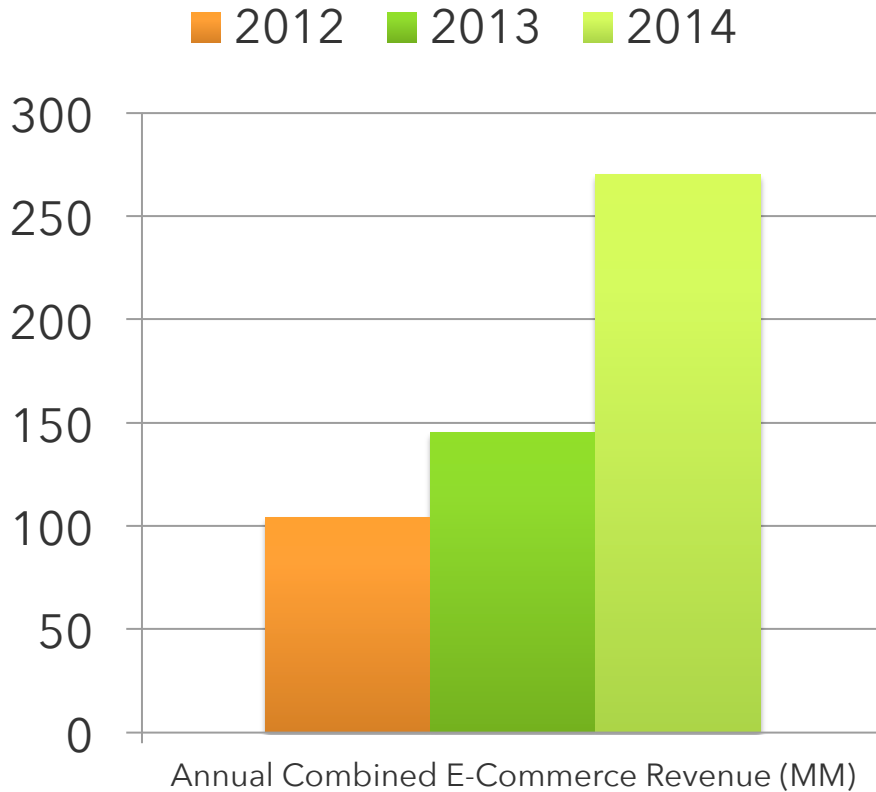
After - Kay, Jared, Kay Outlet



On Kay and Jared, only the header UI was implemented. On Kay Outlet, the header was implemented, and the navigation was organized according to our recommendations. Updated navigation is slated to go live on Kay and Jared in August 2014.

The redesigned My Account section was shelved until there is a complete and unique redesign of the sites. The Payment Flows were broken out and are slated to go live in July 2014.

BY THE NUMBERS



- Increase in conversation rate from 1% to 2% projects a \$125 million jump in combined revenue in 2014, from \$145 million to \$270 million
- 12% reduction in related call volume projects to save \$4.175 million in 2014
- Kay Outlet launched with \$2 million in revenue from 11/2013 to 2/2014

KAY OUTLET

\$2 MILLION

E-Commerce Revenue, First 3 Months

ALL E-COMMERCE

\$145 MILLION

Revenue, 2013

ALL E-COMMERCE

\$15 MILLION

Revenue in Excess of Goal, 2013

CUSTOMER SERVICE

\$4.1 MILLION

Amount Saved in Help Center Call Reduction, 2014

EASY2 TECHNOLOGIES

PRODUCT DEMOS - A SASS PLATFORM

PRODUCT DEMO REDESIGN

“Simplicity isn’t about dumbing it down, it’s about prioritizing. Not volume, but clarity.”

**-ADAPTED FROM: CHIP
HEATH, *MADE TO STICK***

sys·tem

ˈsɪstəm/ noun

1. a set of connected things or parts forming a complex whole, in particular.

a set of things working together as parts of a mechanism or an interconnecting network.

noun: system; **plural noun:** systems

"the state railroad system"

synonyms: structure, organization, arrangement, network

How can we make our content available
to as many retailers as possible?



EXPANDING OUR SYNDICATION NETWORK

At Easy2 Technologies, we needed to find a way to expand the syndication network for our flagship SaaS platform, MYO Demo. It's growth had stalled, largely because our Flash demos were not tablet or mobile compatible. We had created separate mobile and tablet demos, but that meant retailers were forced to add 3 sets of code to their websites.

This project would also future-proof our technology for the upcoming wave of responsive sites, as our products would need to function on fluid and responsive sites.

So, we set out to:

- Recreate our existing Flash product demos in HTML5
- Add new templates with brand new functionality
- Update the demo builder interface to support the new templates.

INSIGHTS

- The business objective was to replicate the existing Flash templates in HTML5, with the flexibility to improve the experience within the scope of the project
- The new templates were designed from scratch and were intended to expand the functionality of demos
- Expanding our syndication network was important because it was critical to our vendors (our paying customers - our users were not our customers)
- As we expanded into new verticals, we found that retailers were unwilling to accept our demos because they were Flash
- Leadership believed this change would open up new industries as potential customers

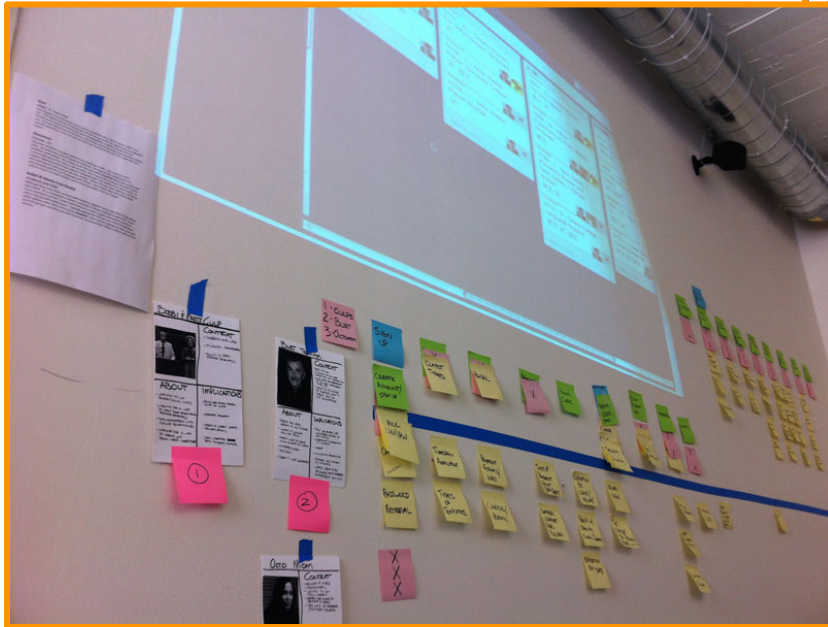
MY CONTRIBUTIONS


Research


- Competitive Analysis

User Task Modeling

- Customer Profiles
- Personas
- Storymapping



<h3>TISH HUGHES</h3>	
	CONTEXT -UP, E-COMMERCE
ABOUT WANTS TO BOOST CONVERSIONS WANTS TO BOOST SITE TRAFFIC LOOKING FOR CONSISTENCY LOOKS TO BETTER UNDERSTAND CUSTOMERS & THEIR PREFERENCES	IMPL - REPORT & DEMO - NEEDS CONTENT - NEEDS CHOICE MASS - OUR DE CAN HE THESE

<h3>FRANK - "MR. DIY"</h3>	
	CONTEXT • LOOKING TO FIND A DRILL TO REPLACE HIS OLD ONE. • NEEDS IT TO INSTALL HIS NEW FRONT DOOR • WANTS TO USE IT FOR VARIOUS HOME IMPROVEMENTS IN THE FUTURE
ABOUT • FANCIES HIMSELF AS SOMEONE WHO IS GOOD AT DIY PROJECTS, ACTUALLY ISN'T • WORKS FOR A PAPER SUPPLY COMPANY AS A HR REP • FASCINATED BY CHARLIE SHEEN'S MIDDOWN • IS PROUD OF HIS DIY PROJECTS AND DOES THEM - SMALL ONES - FREQUENTLY • UPSET THAT HIS LAST DRILL WASN'T CORDLESS • DOESN'T LIKE SHIPPING	IMPLICATIONS • WANTS TO KNOW WHAT PRODUCTS ARE THE BEST → NEEDS SPECS / PRODUCT DETAIL • ACTUAL DIY KNOWLEDGE ISN'T HIGH BUT SMART & USES RESOURCES AVAILABLE TO HIM WELL → VERSATILE • N/A • NEEDS TO BE ABLE TO DISTINGUISH BETWEEN REGULAR & DURABLE DRILLS → COMPARISON PAGES • SUB-DETAILS (EX. BATTERY OR CORDLESS, + BATTERY LIFE) • MAKE THE MOBILE PS LIGHT / QUICK / EASY

MY CONTRIBUTIONS

Interaction Design

- Sketches
- Wireframes
- Paper Prototypes
- HTML Prototype Review

Design

- Visual Design Review

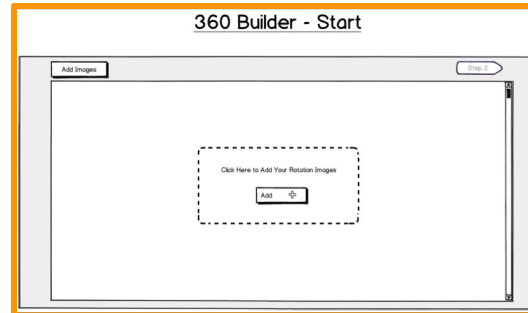
Usability Testing

QA

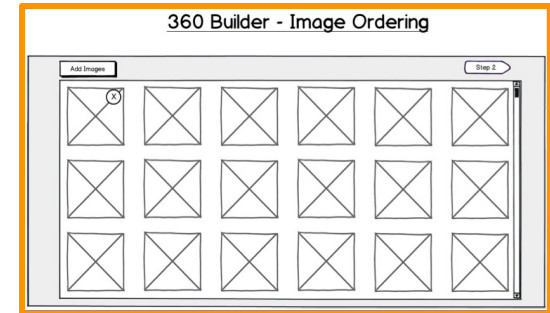
***Agile UX Designer**

***Agile Product Owner**

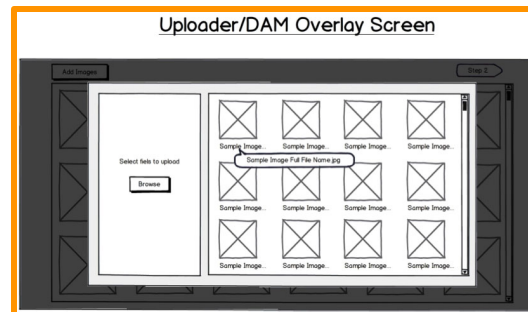
***Agile Analyst**



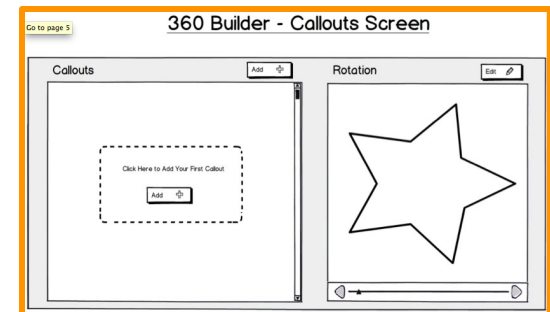
360° Rotation Builder 01



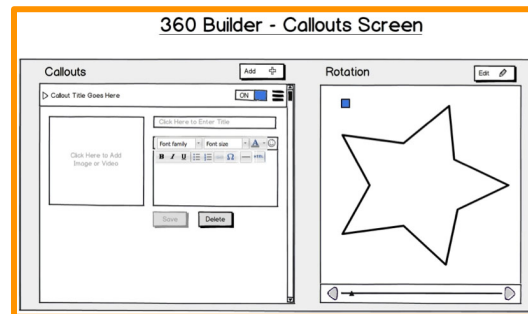
360° Rotation Builder 02



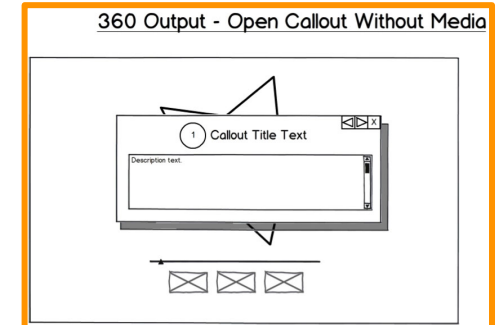
360° Rotation Builder 03



360° Rotation Builder 04



360° Rotation Builder 05



360° Rotation Builder 06

MY CONTRIBUTIONS

Interaction Design

- Sketches
- Wireframes
- Paper Prototypes
- HTML Prototype Review

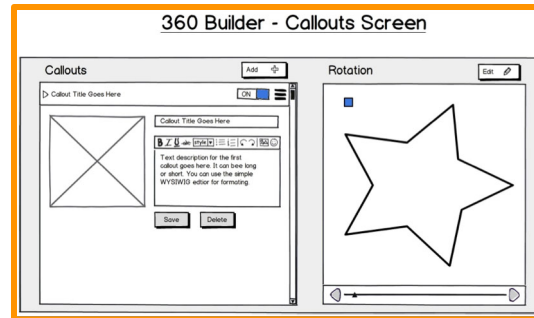
Design

- Visual Design Review

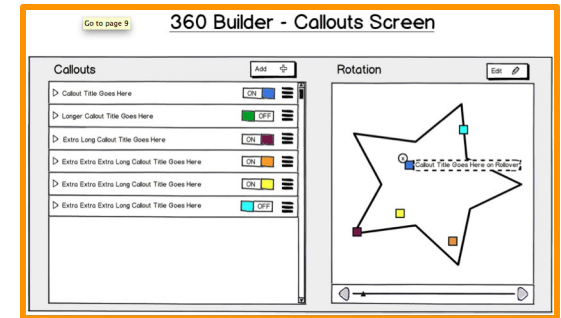
Usability Testing

QA

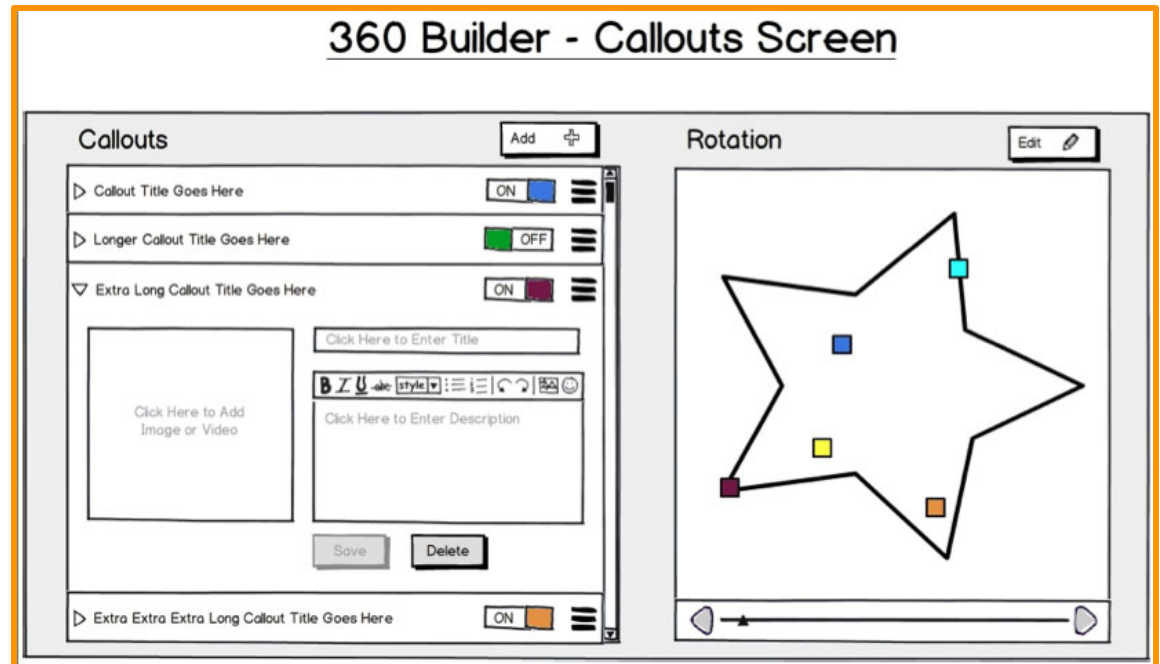
- *Agile UX Designer
- *Agile Product Owner
- *Agile Analyst



360° Rotation Builder 07

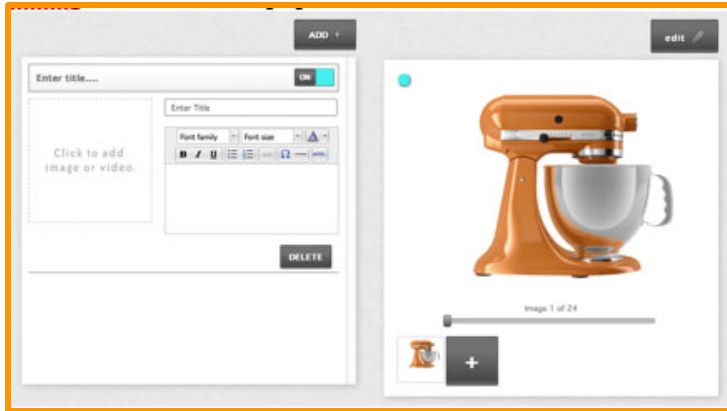


360° Rotation Builder 08

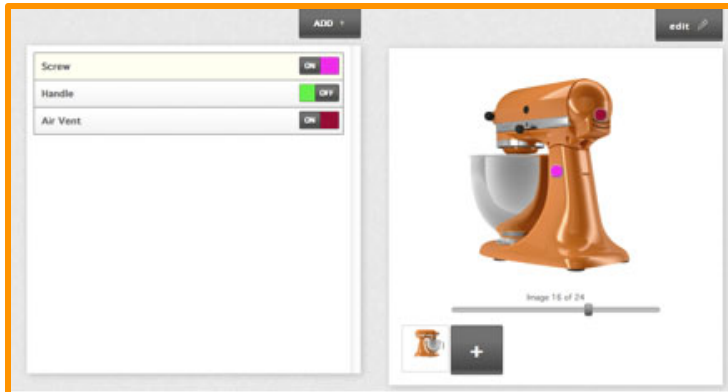


360° Rotation Builder 09

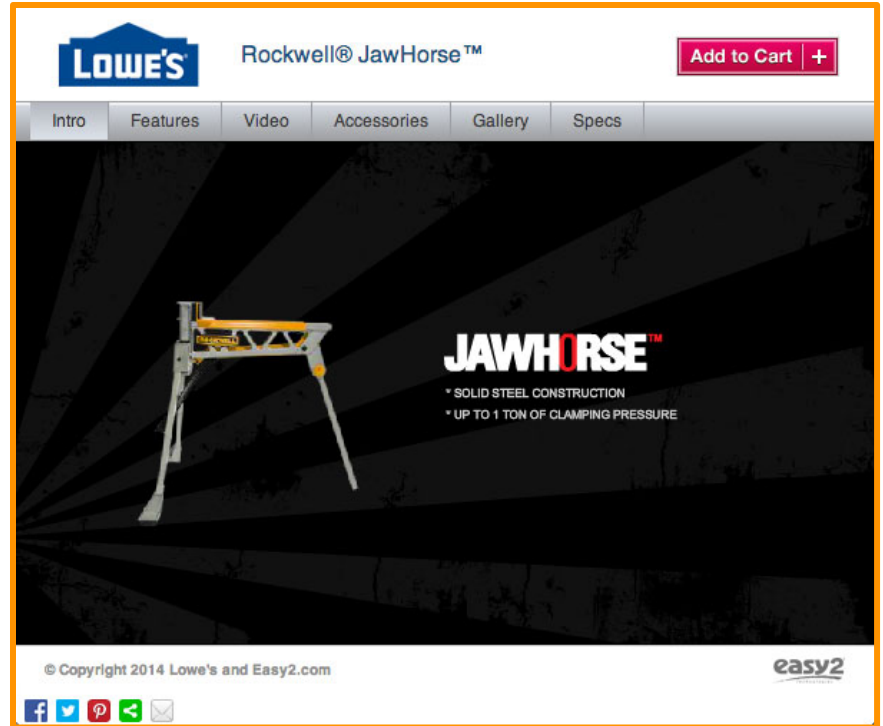
RESULTS



360° Rotation with Callouts Builder - KitchenAid Mixer



360° Rotation with Callouts Builder - KitchenAid Mixer

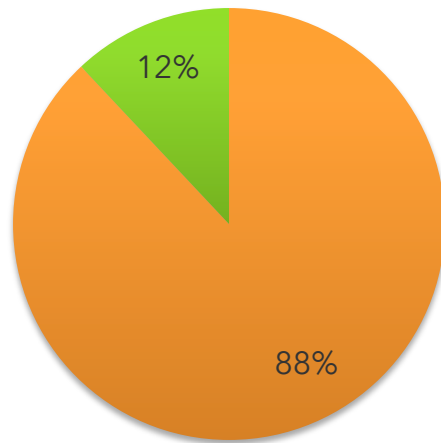


Full Demo - Rockwall Jawhorse on Lowes.com

We ported 8 Flash templates into HTML, and retired 2 others. We also introduced 6 new templates and rebuilt the SaaS builder to support them.

BY THE NUMBERS

% of Clients after 6 Months



■ HTML 5 ■ Flash

EASY 2 SAAS PLATFORM

16% INCREASE

Product Demo Revenue, 2012

EASY 2 SAAS PLATFORM

\$7 MILLION

Product Demo Revenue, 2012

CLIENT SERVICES

> EFFICIENCY

Dramatic reduction in time spent building demos for confused clients (Not Quantified)

STERLING JEWELERS

JEWELRY EDUCATION SITE

JEWELRY WISE

“Context is everything.”

-REX HARTSON, THE UX BOOK

de·tail

di'tāl, 'dētāl/Submit

noun

1. an individual feature, fact, or item.

"we shall consider every detail of the bill"

synonyms: particular, respect, feature, characteristic, attribute, specific, aspect, facet, part, unit, component, constituent; fact, piece of information, **on, point, element, circumstance, consideration**

"the picture is correct in every detail"

How can our brands earn the trust of
a new generation?

KAY[®]
JEWELERS
Every kiss begins with Kay.[®]



JARED[®]
The Galleria Of Jewelry

JEWELRYWISE IS BORN

Sterling's jewelry brands needed a way to connect with a new generation.

A proposed hub for educational jewelry content had been shelved for years. We resurrected it with the idea that we could turn it into both an ecosystem to populate content to all of our brand sites, and use it to engage a new generation of customers at a critical point in their lives - the marriage proposal.

Jewelry Wise was given a \$600,000 budget, and we were given four months to launch the site.

INSIGHTS

- We wanted to position Jewelry Wise as a “trusted advisor” to all jewelry customers – not just Kay & Jared customers
- We divided the content into three main categories: Wedding/Engagement, Gift Giving, and Self-Purchasing, meeting our business objectives as well matching the mental models of our target users
- The goal of the site was to educate, not sell – in places where there was an opportunity we attempted to keep it very soft
- We were required to but purposely did not heavily promote our brands to add credibility to Jewelry Wise, as we were concerned that over promotion would undermine the rapport we were aiming to build
- We wanted the site to be responsive not only for its inherent benefits, but also because we wanted to introduce the concept to Sterling

MY CONTRIBUTIONS

- Proposed an ecosystem that would distribute the educational content throughout our family of sites
- Helped develop the site strategy
- Helped develop and organize the content strategy
- Helped develop a Jewelry Wise brand (including the name)
- Reviewed content (articles, infographics, videos, and interactive tools)
- Chose stock photography
- Oversaw video and photography shoots on location in Jared Stores

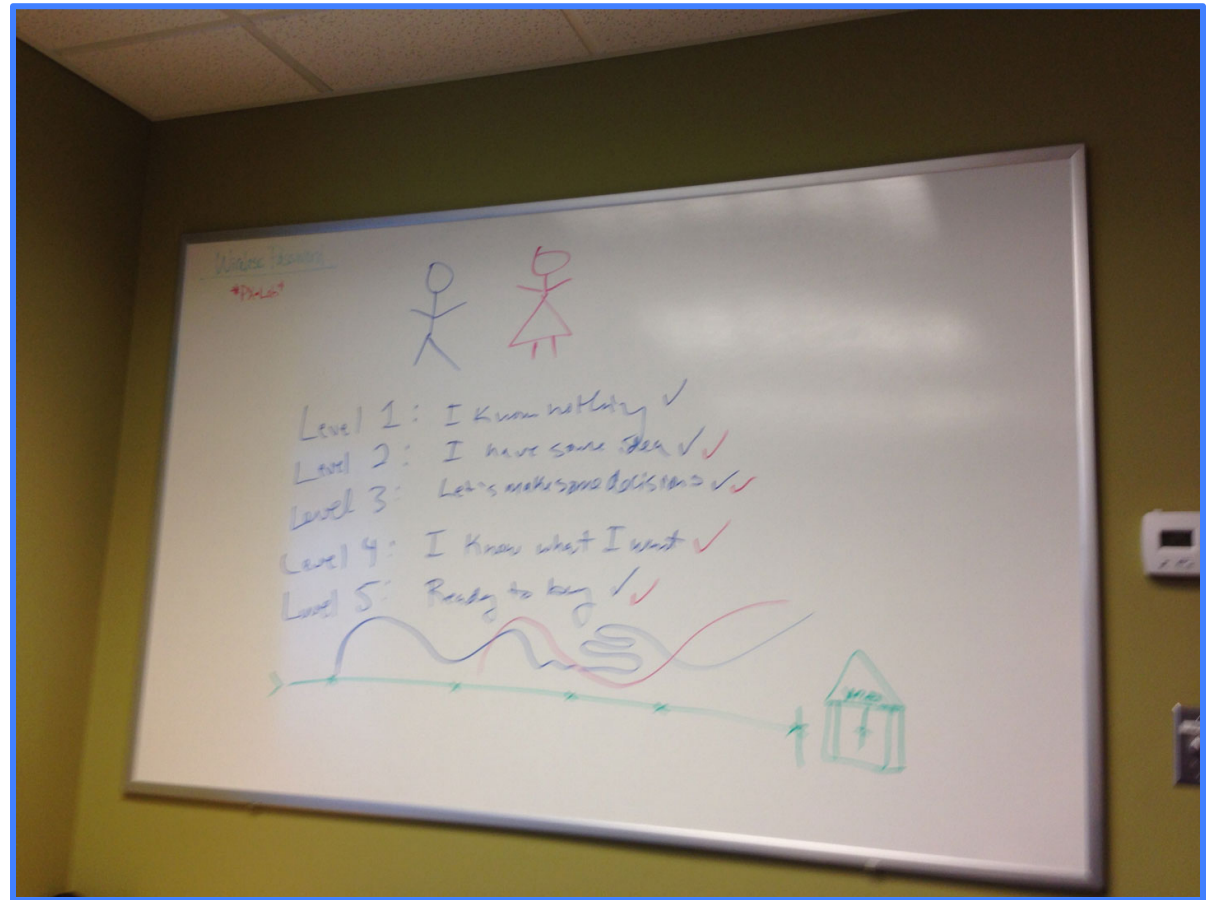
MY CONTRIBUTIONS

Research

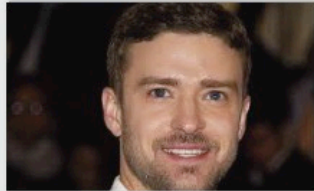
- Analyzed internal market research
- Site-Intercept Surveys
- VOC Surveys

User Task Modeling

- Personas
- User Journeys



MY CONTRIBUTIONS



Brad - Engagement Ring Purchaser (Jared)

- Male
- Working on a budget
- "Afraid" of jewelry stores
- Can spend \$4,000
- Retail Software Professional
- Wants to get engaged



Brad is a young man looking to propose to his longtime girlfriend. He knows very little about jewelry and is not confident in his ability to choose a suitable engagement ring. He knows he needs help and plans to leverage the internet as a tool to educate himself on the details of rings and proposals.

- Goals**
- Propose to his girlfriend
 - Learn about getting engaged
 - Learn about diamonds
 - Do not spend more money than he has on a ring
 - Make the proposal a surprise
- Pain Points**
- Lack of domain knowledge
 - Pushy salespeople
 - Not enough money to buy his girlfriend what

Primary Scenario

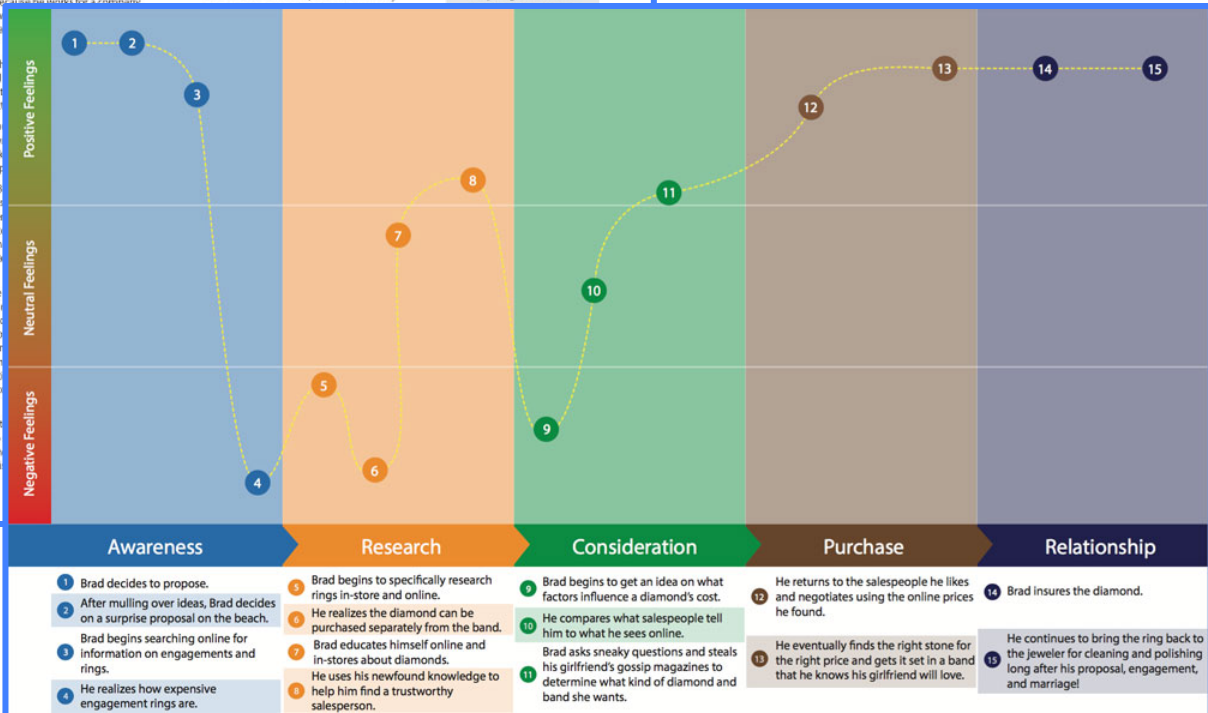
Brad has been dating his girlfriend for three years and is ready to propose. He is excited and scared of the unknown. Because he works for a company that produces software, he has a familiarity with retail websites. He skips to learning about getting engaged.

After he learns about diamonds, he feels comfortable with the idea. As a software professional, he takes a creative, romantic path.

According to the "50 Rule", he should be spending at least 50% of his income on a ring. He loves his girlfriend and is willing to be expensive due to the fact that he has saved \$4,000 in cash and doesn't want to overextend his finances.

Now he begins the research phase. He goes to several websites but only knows about diamonds. He is influenced by some salespeople who offer smaller, locally-owned stores. He is drawn to the character of the salesperson who has learned to trust from the band.

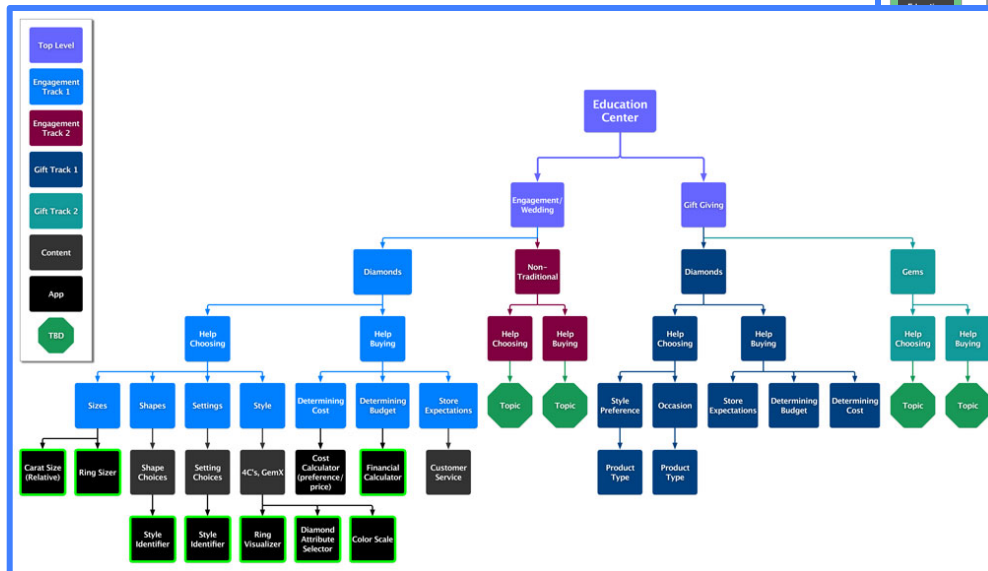
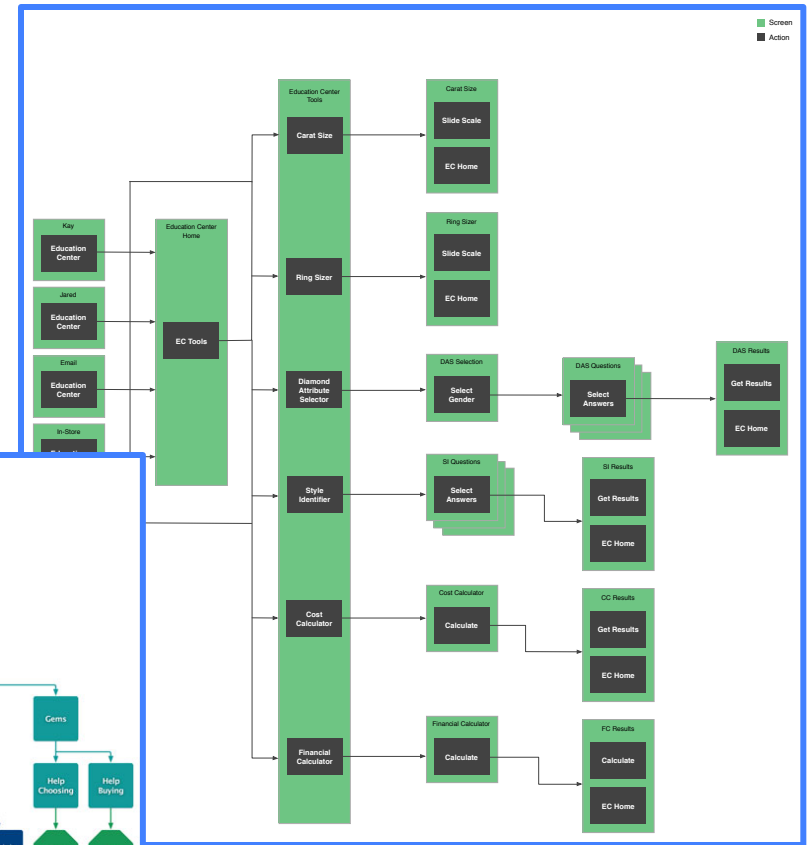
Because he wants to propose, Brad decides to do his own research. He figures out what kind of ring he wants. He learns that she



MY CONTRIBUTIONS

Information Architecture

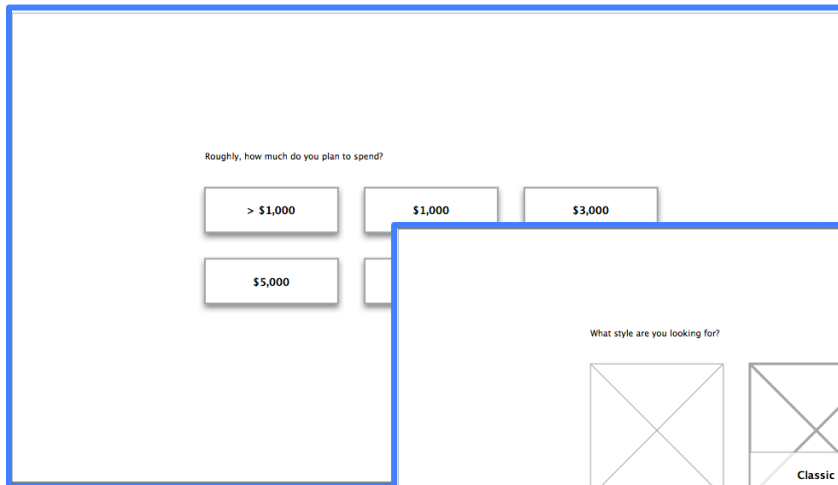
- Taxonomy
- Navigation
- User Flow



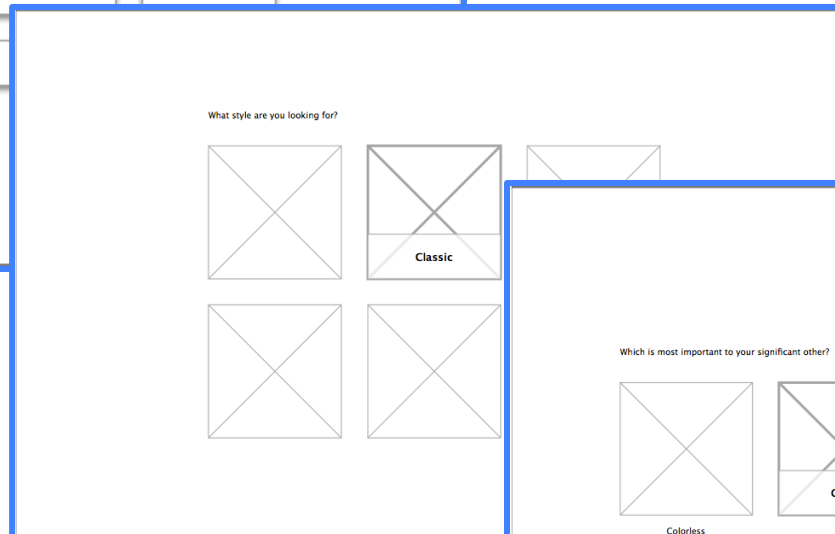
MY CONTRIBUTIONS

Interaction Design

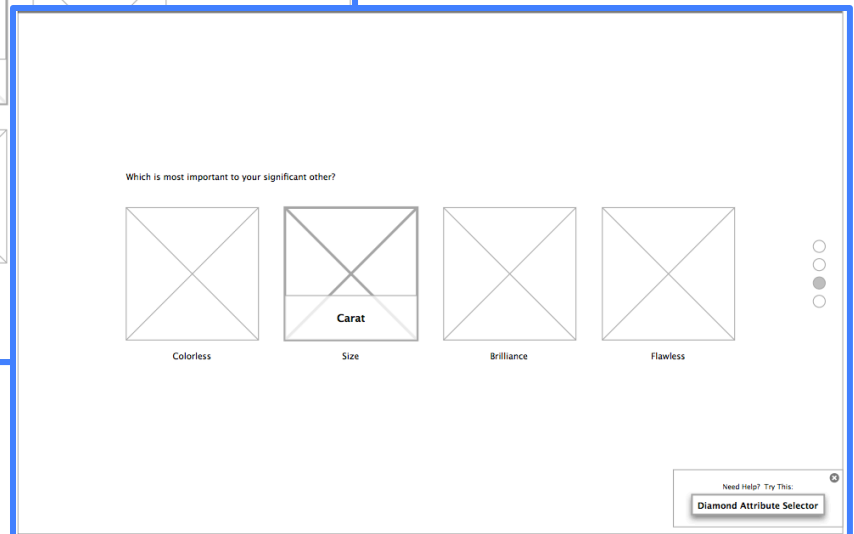
- Wireframes for interactive tools



Affordability Calculator 01



Affordability Calculator 02

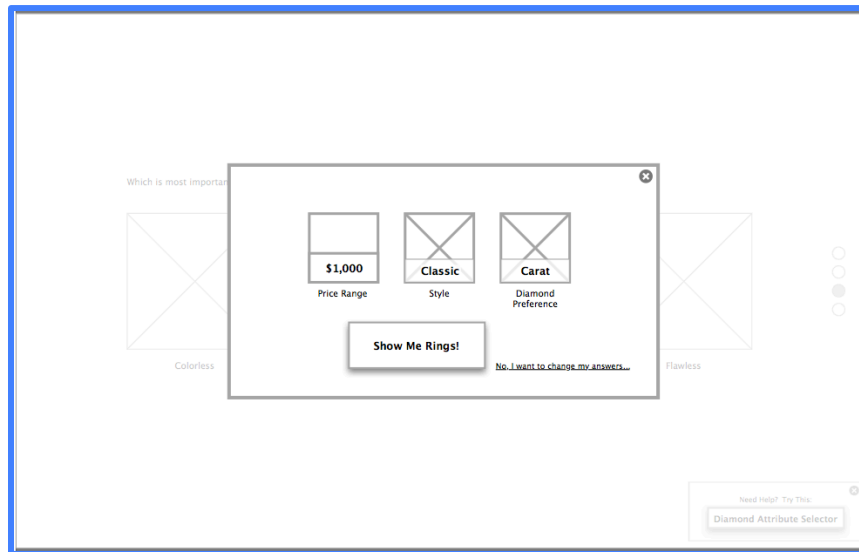


Affordability Calculator 03

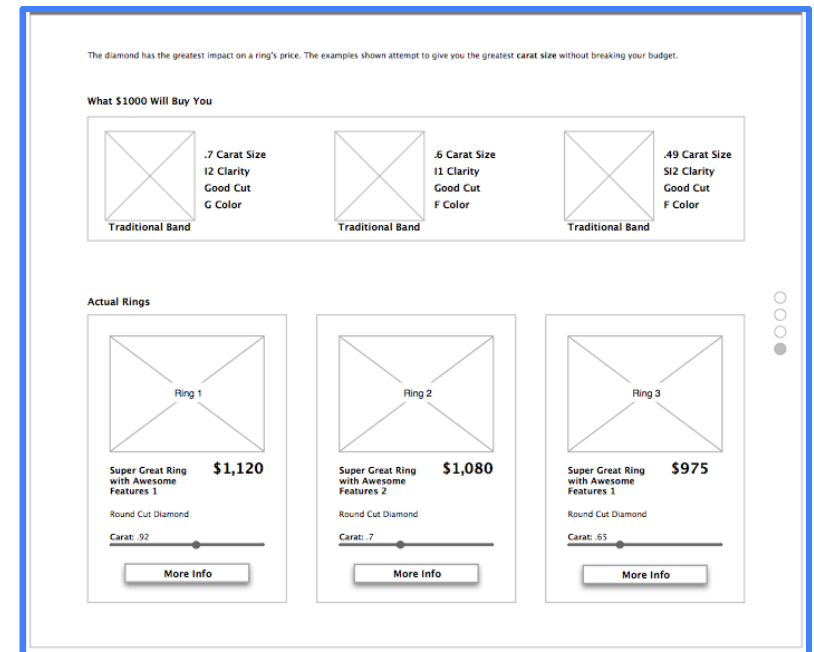
MY CONTRIBUTIONS

Interaction Design

- Wireframes for interactive tools



Affordability Calculator 04



Affordability Calculator 05

MY CONTRIBUTIONS

Design

- Logo and Style Guide Review
- Visual Design Review

Testing

- Usability Testing (Lab-Based Eye Tracking)
- Usability Testing (Task Completion)
- Usability Testing (Heuristics)

QA

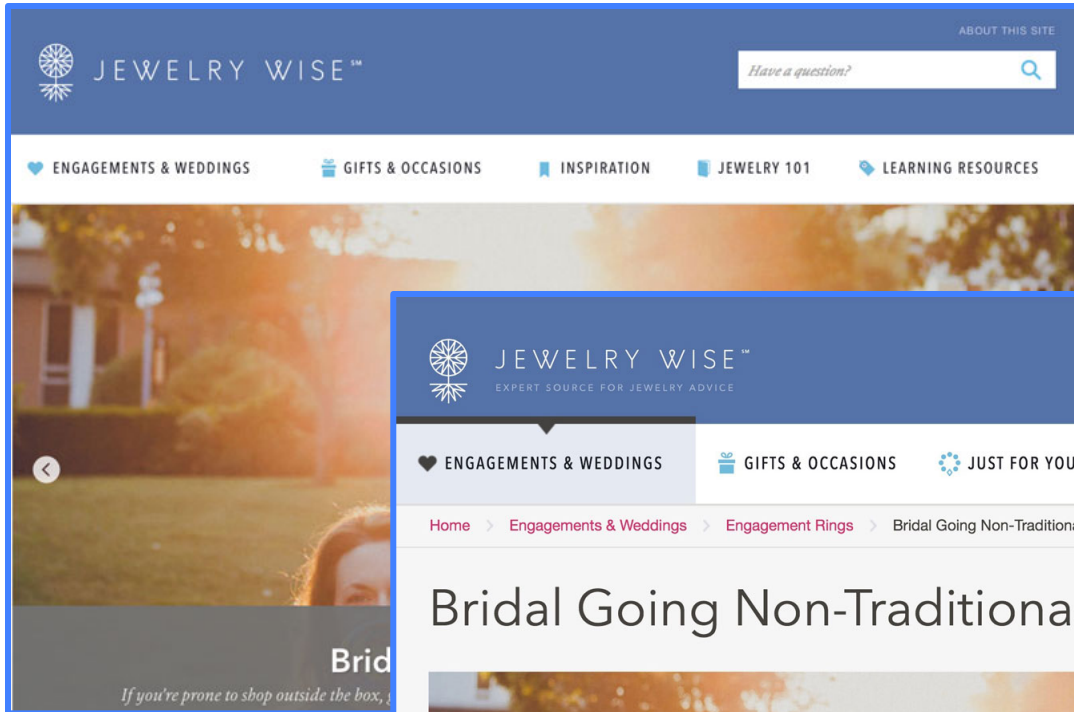
5. COLOR PALETTE & USAGE

Color is a key component of the Jewelry Wise visual identity, and the colors of the palette were carefully chosen to represent the brand.

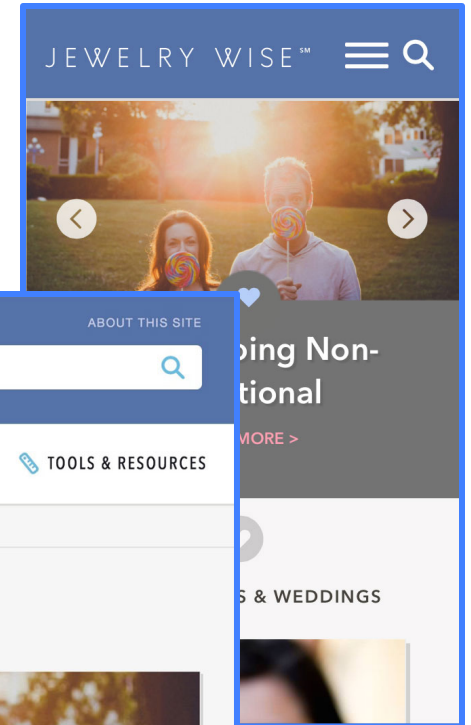
Using these colors consistently across all communications will build recognition for the Jewelry Wise brand by contributing to a unified look and feel. The colors of the palette can be used for text, color fields, backgrounds, rules and other graphic devices.

R: 109 G: 52 B: 71 PMS: 216	
R: 216 G: 48 B: 108 PMS: 226	
R: 254 G: 160 B: 178 PMS: 189	
R: 205 G: 204 B: 204 PMS: 420 @ 85%	R: 247 G: 246 B: 246 PMS: 420 @ 20%
R: 84 G: 114 B: 167 PMS: 2718	R: 111 G: 187 B: 222 PMS: 297
R: 67 G: 66 B: 66 PMS: 419	R: 115 G: 115 B: 115 PMS: 416

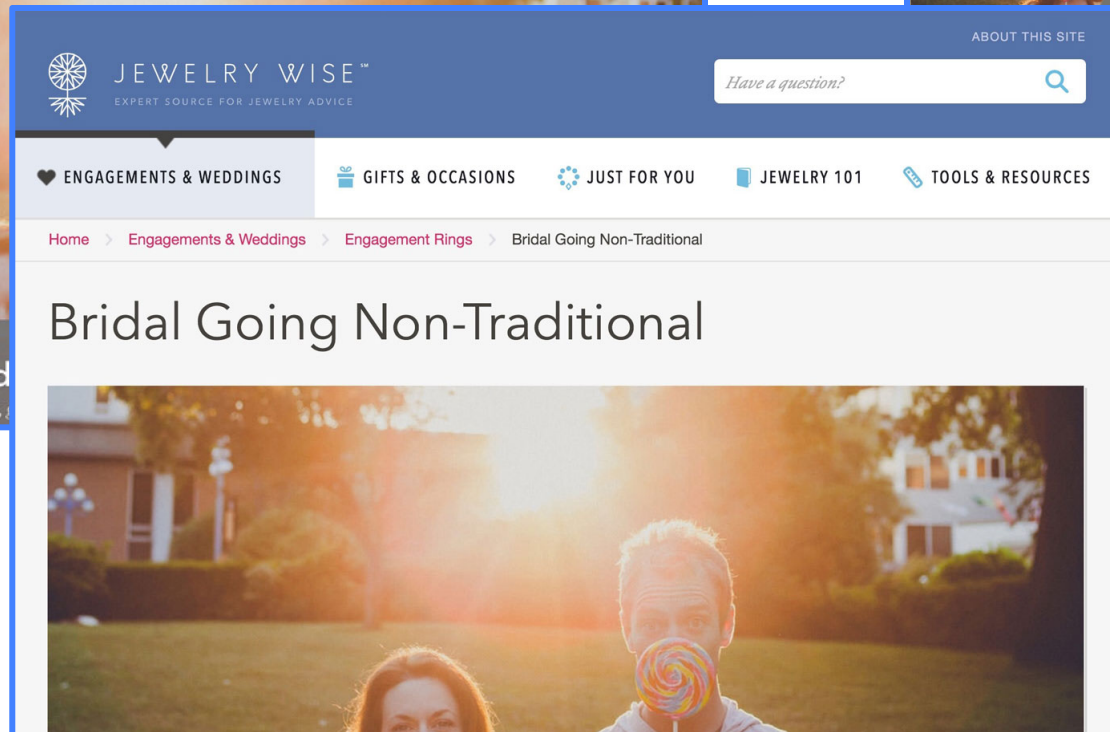
RESULTS



Desktop
Jewelrywise.com



Mobile
Jewelrywise.com



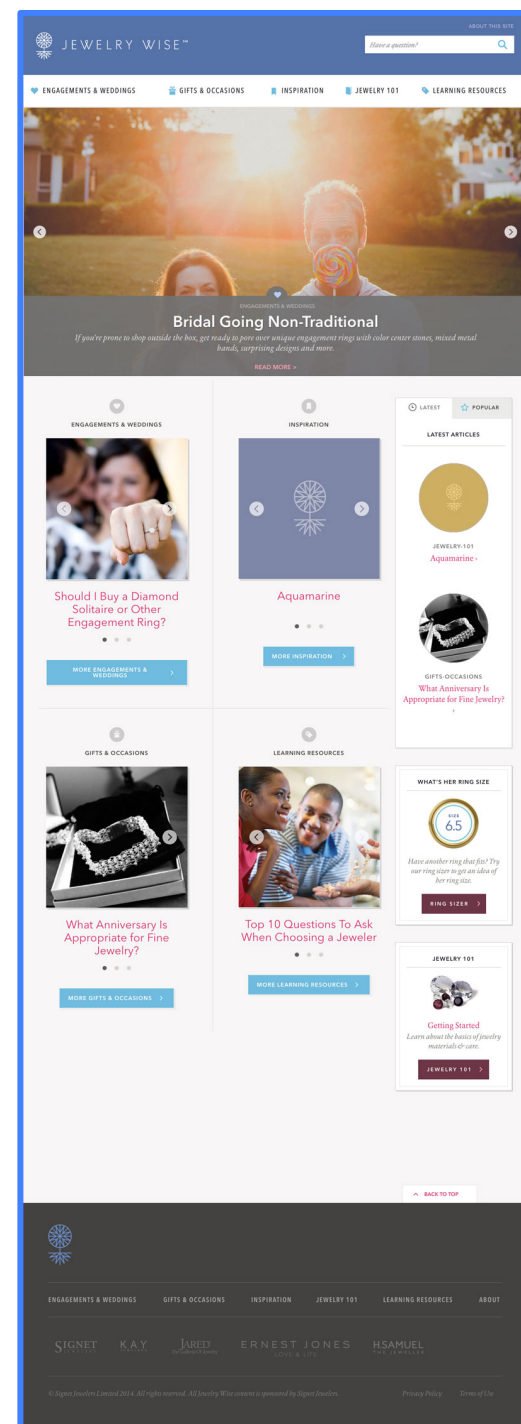
Tablet
Jewelrywise.com

RESULTS

- We launched in October of 2013 with the help of several agencies we hired along the way.
- We came in about \$50K under our \$600K budget, including having \$35K removed from the budget to buy domains unrelated to the project, and spending another \$10K on an internal awareness video that was required of us by C-Level executives.
- Over 100 people were involved in various forms of approval, including an extensive legal review of all content.

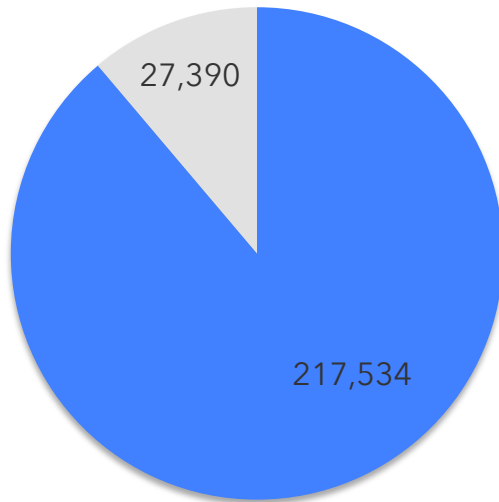
Credit

- *Visual Design and Development:* eHouse Studio
- *Video Production:* Impact Communications
- *Infographics:* visual.ly
- *Content Writing:* Suite Seven



BY THE NUMBERS

First 6 Months



■ New Visitors ■ Returning Visitors

JEWELRYWISE SITE STATISTICS

1.30%

Bounce Rate

JEWELRYWISE SITE STATISTICS

4.52 PAGES

Pages Per Visit

JEWELRYWISE SITE STATISTICS

98 SECONDS

Average Visit Duration

E-COMMERCE COMP REVENUE

ALL 6 MONTHS

Record Comp Revenue

TRADEKING ADVISORS

ROBO-ADVISOR

ACQUISITION FUNNEL

“You cannot design an experience, you can only influence one. The experience belongs to the user.”

-Adapted from Joshua Porter

sto·ry·tell·er

stôr' ē-tĕl' ər

noun

- 1.** one who writes or tells stories.
- 2.** one who relates anecdotes.
- 3.** *informal*: one who tells lies.

noun, adjective

sto·ry·tell·ing

Can we increase the number of funded accounts that users are opening?



A GOAL BASED FUNNEL

TradeKing had launched its own robo-advisor, and after 6 months, it did not have the anticipated traction that the company had expected.

It was decided that the process of signing up needed to change. The original process was a compliance-driven questionnaire that attempted to determine the risk tolerance of a user. However, it was positioned as a free way to determine your risk tolerance, not a way to sign up for the service. It was also the only way to sign up.

We started from scratch, first learning about the mental models of our customers. We learned about their behavior, and what their hopes, fears, and dreams were. After that research, we decided to move forward with a funnel that placed a user in a predetermined investment category that was primarily determined by their investment goals.

INSIGHTS

- We created a few main goals: retirement, emergency fund, major purchase, travel, and a generic category for those without a specific or applicable goal
- Rather than having a single funnel that attempted to combine the sign up process from a investment recommendation, we split them, focusing the funnel on making the best recommendation possible
- We had several requirements that the flow needed to have, so we could determine and factor the user's risk tolerance into the recommendation we provided
- At the end of the funnel, we added a sales page that drove a user to sign up for the service - however, it was not based on the assumption that a user was using the funnel to sign up (as the previous funnel had)
- The TradeKing Advisors brand was evolving, and needed to be incorporated into the project.
- We were also breaking in a newly formed split-testing department and for the first time in TradeKing history, new creative needed to be tested and victorious to be released

MY CONTRIBUTIONS

Research

- Prospect Surveys
- Customer Surveys

User Task Modeling

- Personas
- User Journeys
- User Task Flows
- Task Flows

Saving for Retirement (104/267)

What fears do you have about not saving money?

#	Answer	Response	%
1	I fear not being able to retire	104	39%
2	I fear having to work after retirement	74	28%
3	I fear not having savings in the event I lose my job	61	23%
4	I fear not having savings in the event of a medical emergency	99	37%
5	I fear another costly event or series of events (ex. major home repairs and car repairs at the same time)	81	30%
6	I fear something else	35	13%
7	I fear not being able to pay for my kids education	21	8%
8	I fear not being able to care for an aging parent or relative	23	9%

- 39% fear not being able to retire (104/267)
- 37% fear not being able to afford a medical emergency (99/267)
- 30% fear a costly series of events (81/267)
- 28% fear having to work after retirement (74/267)
- 23% fear not having savings if they lose their job (61/267)

#	Answer	Response	%
1	I fear not being able to retire	51	49%
2	I fear having to work after retirement	11	11%
3	I fear not having savings in the event I lose my job	9	9%
4	I fear not having savings in the event of a medical emergency	12	12%
5	I fear another costly event or series of events (ex. major home repairs and car repairs at the same time)	8	8%
6	I fear something else	8	8%
7	I fear not being able to pay for my kids education	3	3%
8	I fear not being able to care for an aging parent or relative	2	2%
Total		104	100%

- 49% fear not being able to retire THE MOST (51/104)
- 11% fear having to work after retirement THE MOST (11/104)
 - Together, that's 60%

Out of those people who fear not being able to retire....

- 32% are aged 55 to 64 years (33/104)
- 23% are aged 45 to 54 years (24/104)
- 19% are aged 25 to 34 years (20/104)
- 60% are married (62/104)
- 31% are single (32/104)
- 85% have 0, 1, or 2 children (89/104)
- 87% believe they do not earn enough money to invest (20/23)

TKA Personas

Persona Overview



Name	Aunt Patty	Cousin Eddie	Uncle Joey
Persona Title	Saving For Retirement New Investor: Prospect	Don't Have the Money Non-Investor: Prospect	Looking to Switch Experienced Investor: Prospect
Demographics	Age: 32 Occupation: Nurse Gear: MacBook, Chrome, WiFi, iPhone Education: Bachelor's Degree Status: Single TMI: \$40,000	Age: 52 Occupation: Account Manager, Software Vendor Gear: Windows XP PC, Broadband, iPhone Education: High School Diploma Status: Married TMI: \$48,000	Age: 60 Occupation: Corporate Tax Auditor, Partner Gear: Mac, Firefox, Broadband, iPhone Education: MBA, CPA Status: Married TMI: \$150,000
Quote	"I want to retire secure, and not worry about a second career greeting customers at Wal-Mart."	"I know I need to save money, but I just don't earn enough to put some away for the future."	"I'm content with my financial situation. I'm ready to retire, but am not quite financially free. I'm willing to work with you if you can help me retire quickly."
Goals	<ol style="list-style-type: none"> Patty wants to retire. Short-Term: High Motivation. Patty wants to be prepared in an emergency. Short-Term: High-Motivation. Patty wants to not worry about money. Short-Term: Low Motivation. Patty thinks more income is the answer. Short-Term: Low Motivation. 	<ol style="list-style-type: none"> Eddie wants to save for an emergency. Short-Term: High Motivation. Eddie wants to earn more money. Short-Term: High Motivation. Eddie wants to hold onto the money he does have. Short-Term: Low Motivation. 	<ol style="list-style-type: none"> Joey wants to retire. Short-Term: High Motivation. Joey wants to travel with his family. Short-Term: High Motivation. Prior to retirement, Joey is motivated to preserve his current investments above all else. Short-Term: High Motivation. Joey wants to make sure his family is taken care of. Short-Term: Low Motivation.

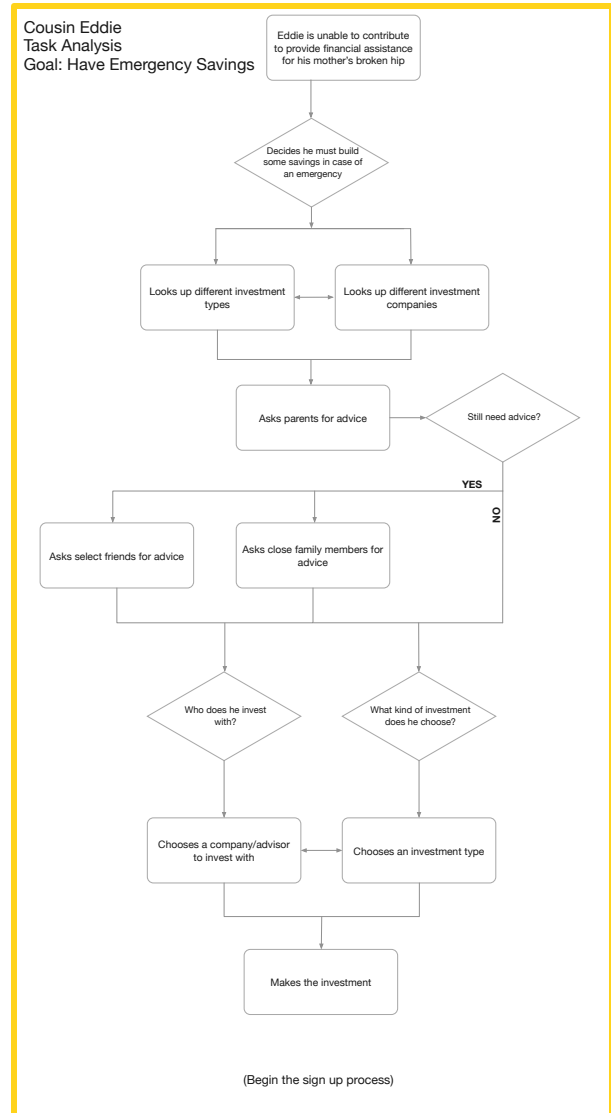
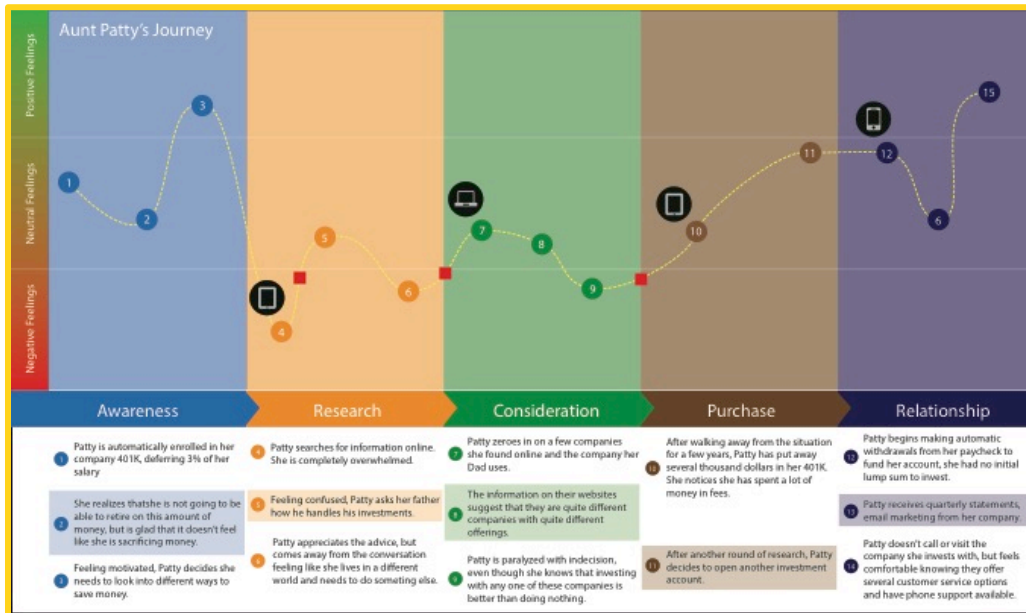
MY CONTRIBUTIONS

Research

- Prospect Surveys
- Customer Surveys

User Task Modeling

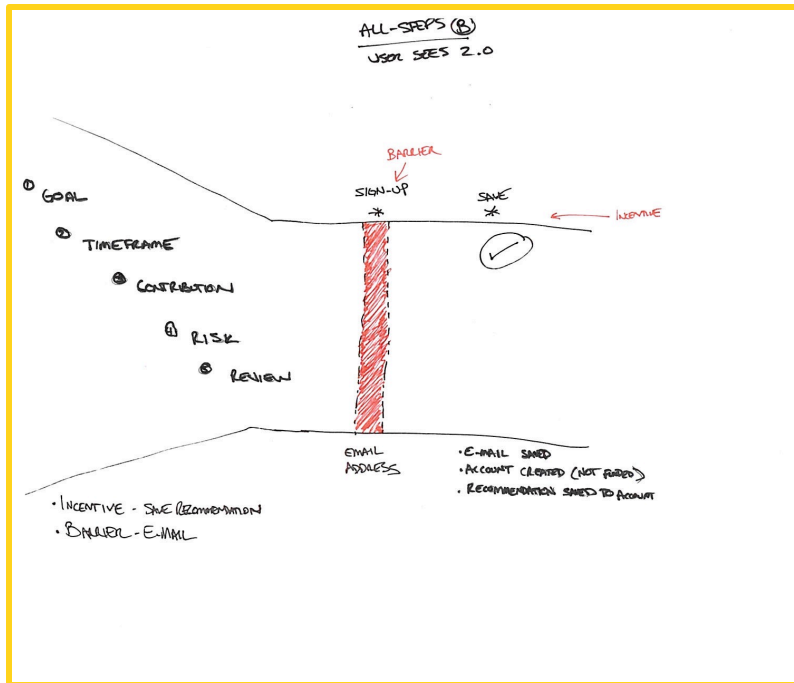
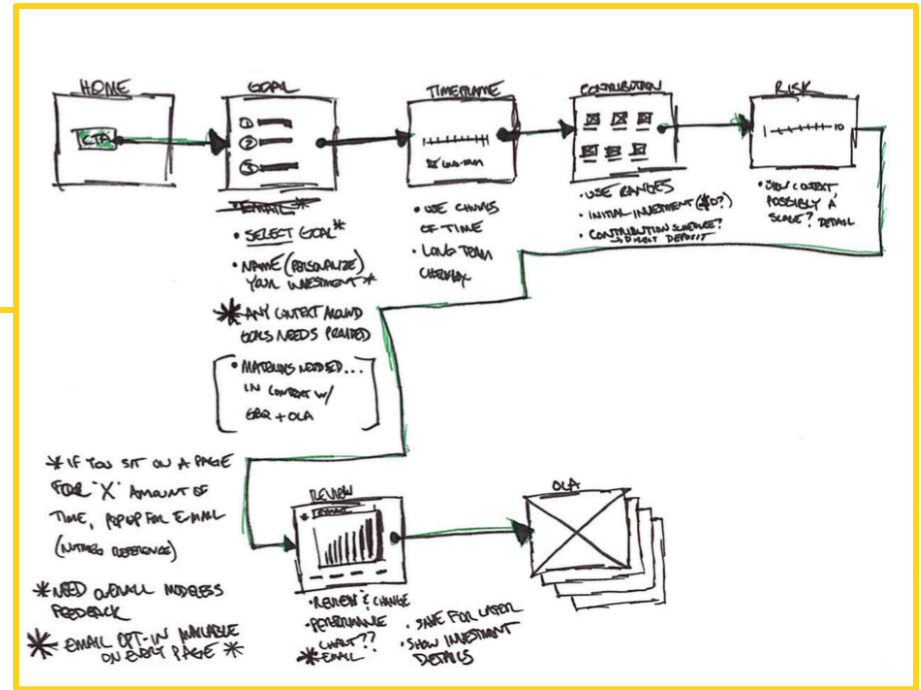
- Personas
- User Journeys
- User Task Flows
- Task Flows



MY CONTRIBUTIONS

Information Architecture

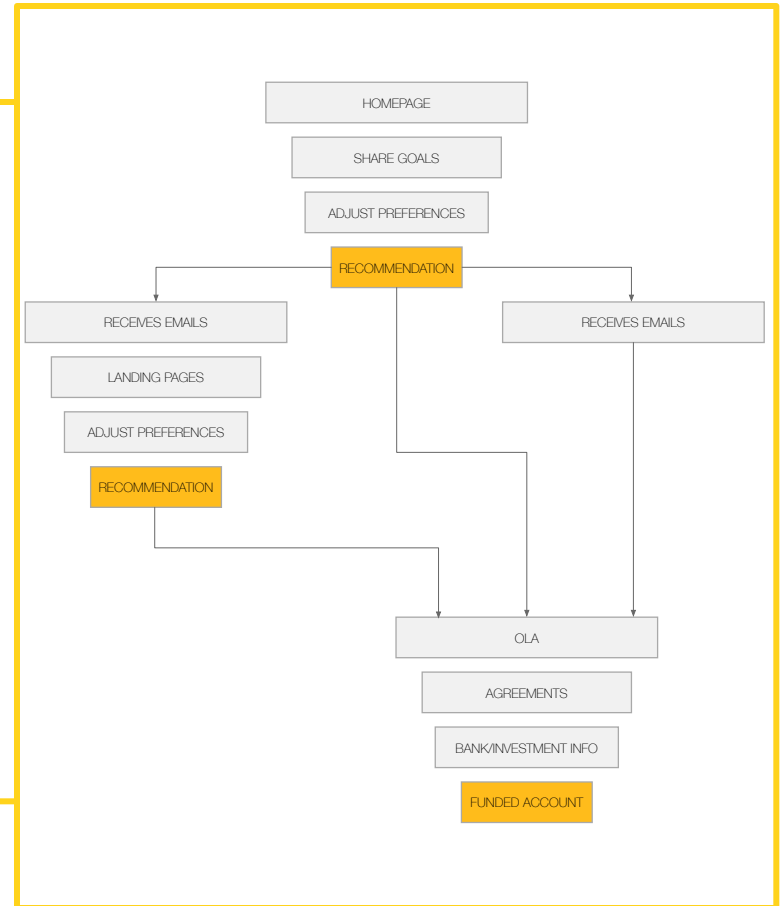
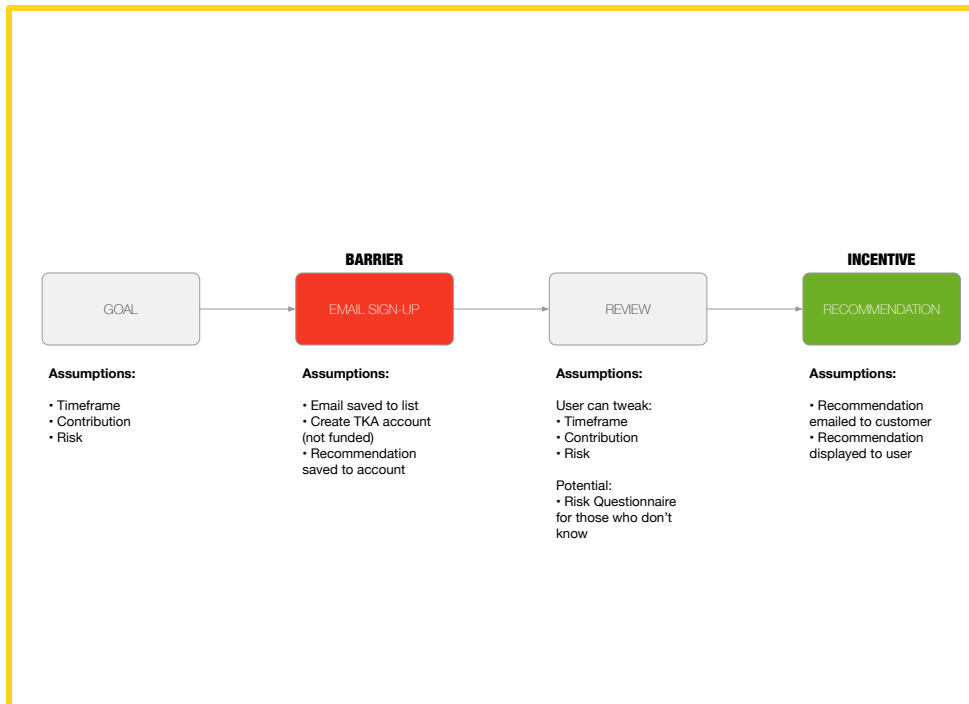
- Nomenclature
- User Flows



MY CONTRIBUTIONS

Information Architecture

- Nomenclature
- User Flows



MY CONTRIBUTIONS

Interaction Design

- Screen Flows
- Sketches
- Wireframes
- Interaction Flows

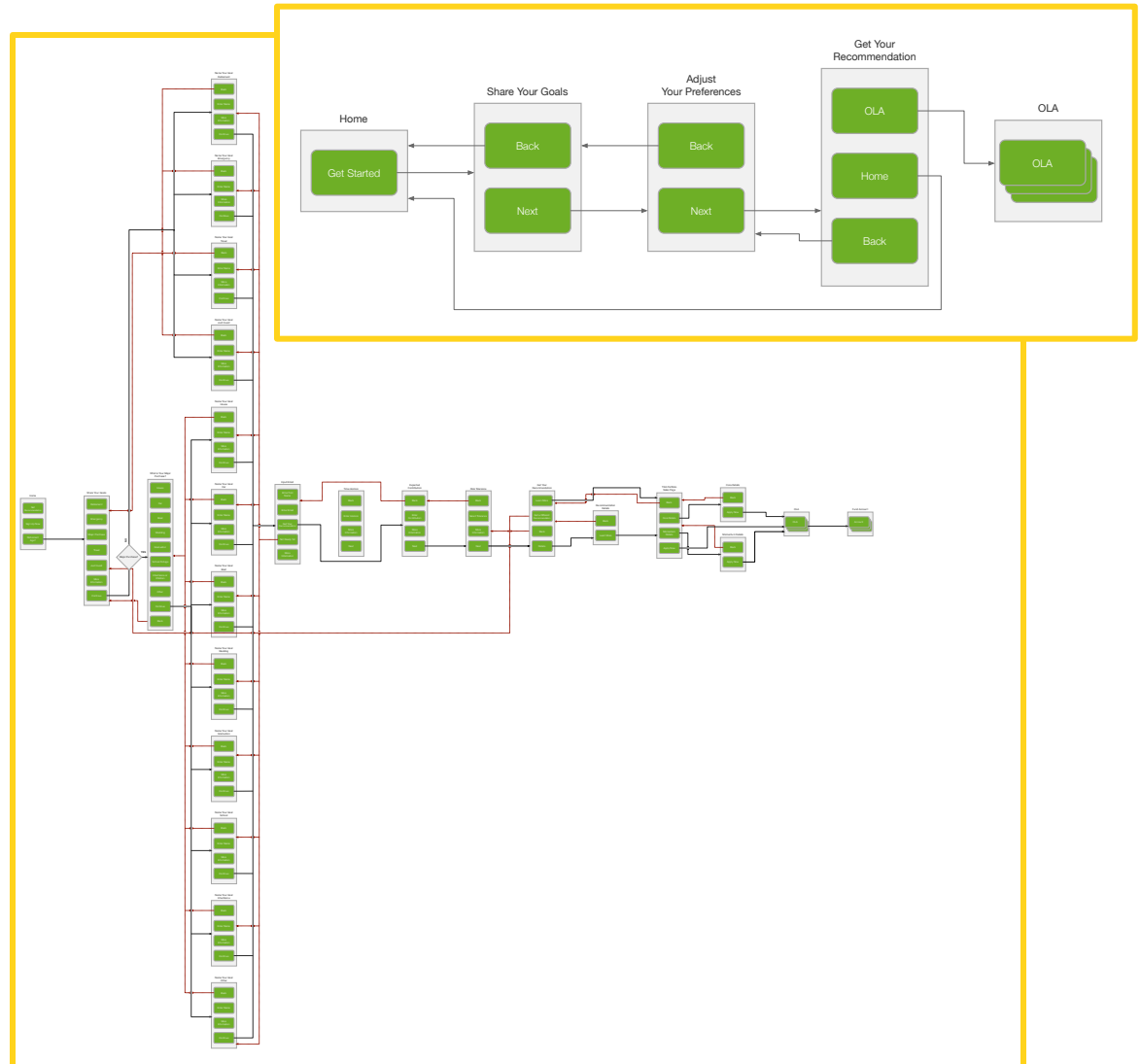
Design

- Visual Design Review

Testing

- A/B Testing
- Usability Testing (Task Based)

QA



MY CONTRIBUTIONS

Interaction Design

- Screen Flows
- Sketches
- Wireframes
- Interaction Flows

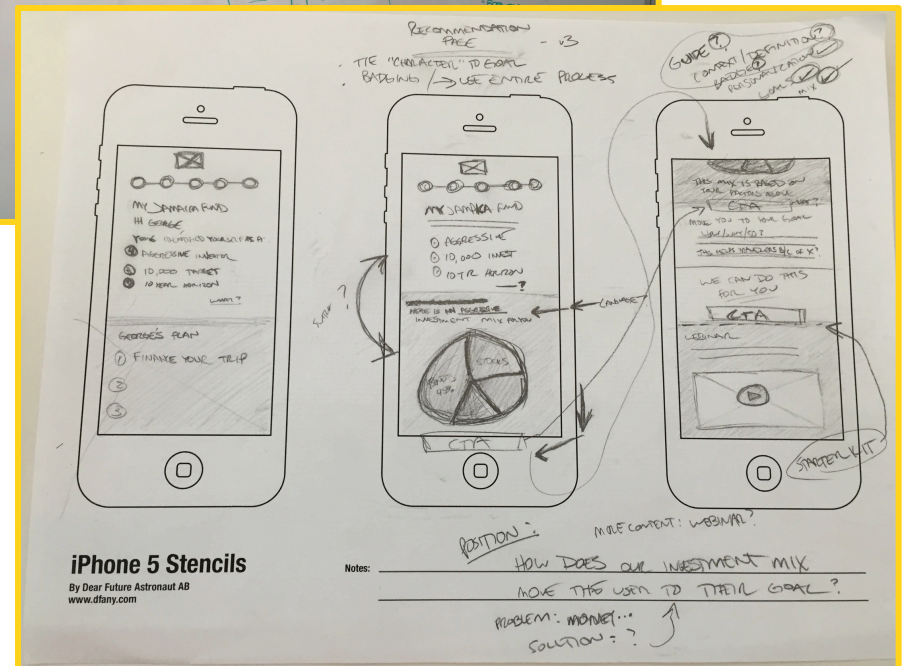
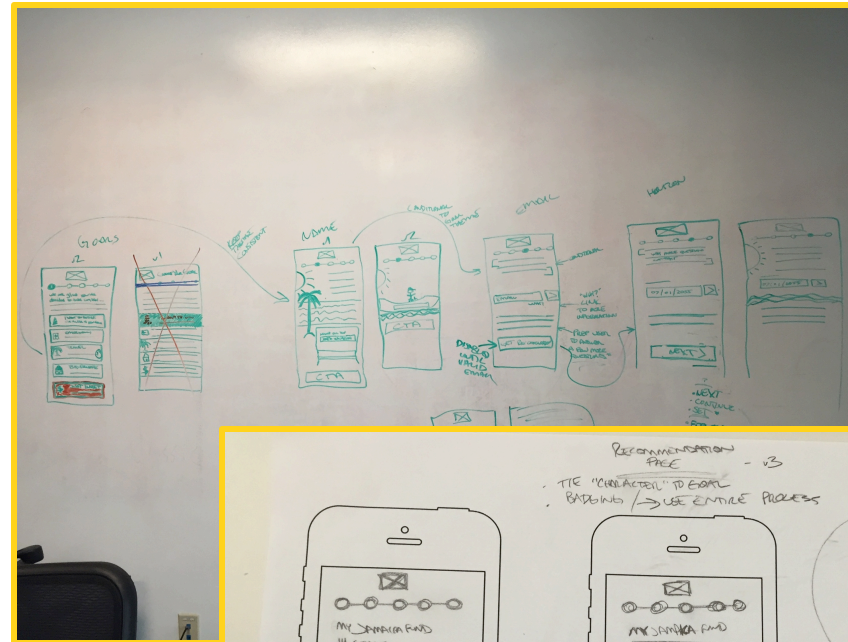
Design

- Visual Design Review

Testing

- A/B Testing
- Usability Testing (Task Based)

QA



iPhone 5 Stencils
By Dear Future Astronaut AB
www.dfan.com

Notes:

RESULTS

We launched in May 2015 and after several tests and tweaks we had achieved statistically significant improved conversion rates on both account acquisition and funding at which it fully replaced the original acquisition funnel in July 2015.

We noted that as our conversion rate increased, the number of users who completed the funnel decreased, suggesting (but not proving) we were successfully reaching our target users.

Further tests and improvements are being continually made.

The screenshot displays a web interface for TradeKing advisors. At the top, a progress bar shows seven steps, with step 1 highlighted in green. The main heading is "Why are you looking to invest?". Below this, there are five radio button options, each with an icon and a description:

- I Want to Retire Securely Live the retirement of your dreams.
- I Want to Be Protected Protect yourself and your family in an emergency.
- I Want to Make a Major Purchase House? Car? Wedding? Graduation? College?
- I Want to Travel There's nothing like the freedom of traveling.
- I Just Want to Invest (Other) Nothing wrong with some forward thinking.

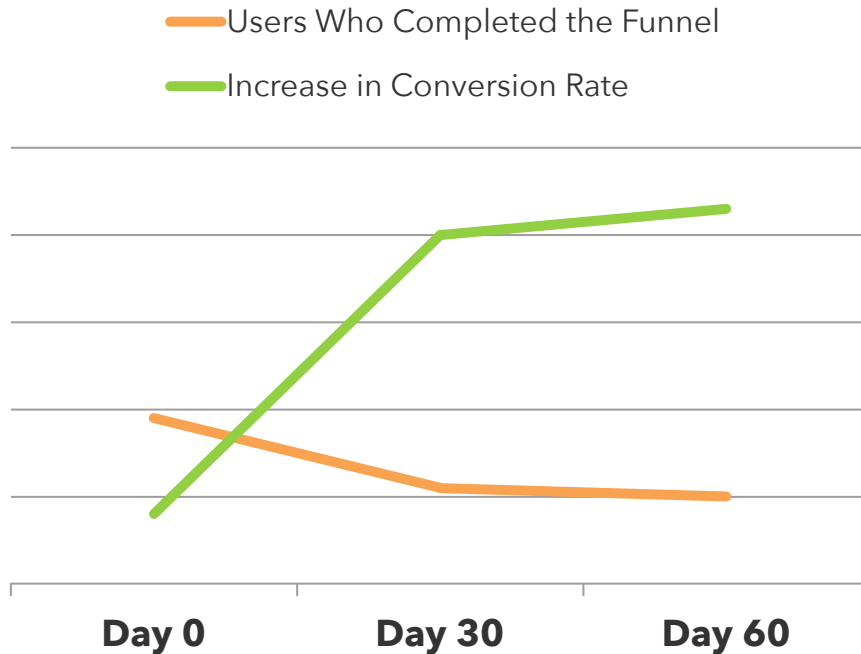
Below the options is a green button labeled "GET YOUR RECOMMENDATION >". Underneath the button is a link that says "Need more information?". At the bottom of the page, there are four contact options: "Frequently Asked Questions", "Call 800-425-3205", "Chat M-F 8am-6pm ET", and "Email service@tradekingadvisors.com".

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BY THE NUMBERS



- * Defined as a user who completed the flow and opened an account within 30 days
- † Defined as a user who opened an account and funded it within 60 days
- ^ Defined as a user who advances to the final page of the funnel, where they are presented with the option to join

TRADEKING ADVISORS

32% INCREASE

Increase in Conversion Rate*

TRADEKING ADVISORS

8% INCREASE

Increase in Funded Accounts†

TRADEKING ADVISORS

3% INCREASE

Increase in Average Amount of Account Funding

TRADEKING ADVISORS

9% DECREASE

Users Who Completed the Funnel^

WHAT ELSE HAVE I WORKED ON?

EASY2 TECHNOLOGIES

NOTABLE PROJECTS

- Mobile Product Demos
- Tablet Product Demos
- Mobile Product Selectors
- Tablet Product Selectors
- In-Line Content
- Product Demo Builder
- Product Selector Builder

STERLING JEWELERS

NOTABLE PROJECTS

- Kay.com Mobile
- Jared.com Mobile
- Kay.com Tablet
- Jared.com Tablet
- Kay iOS App
- Jared iOS App
- Kay Android App
- Jared Android App
- Kay Gold Exchange
- Jared Gold Exchange
- JB Robinson Gold Exchange
- Sterling Gold Exchange
- Kay.com Updates
- Jared.com Updates
- Zales.com Updates
- Gold.com Redesign

TRADEKING

NOTABLE PROJECTS

- Tradeking.com Responsive Redesign
- Tradekingadvisors.com Redesign
- TK Connect Social Platform
- TradeKing LIVE Software Platform
- MBT Software Acquisition and Integration
- TradeKing Marketing Landing Pages
- TradeKing Email Communications
- TradeKing Brand Refresh
- TradeKing Acquisition Projects
- TradeKing Advisors Acquisition Projects