Tony Owens

Human-Centered Product & Service Design Leader

UX PORTFOLIO – 2024 / 2025

tonyowens@uxarchitect.net | www.tonyowens.net | linkedin.com/in/tonyo | 347.332.3030

Some case studies in this portfolio are under non-disclosure agreements (NDAs). To comply with my agreements and preserve the confidentiality of these projects, I have omitted and obfuscated any confidential information within these case studies.
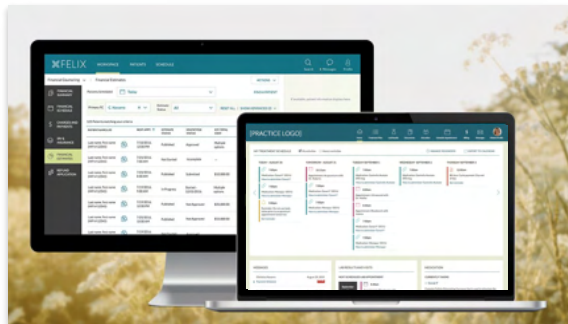
All information in these case studies is my own and does not necessarily reflect the views of my past or current clients or employers.

Please refrain from sharing this portfolio since it may contain confidential information.
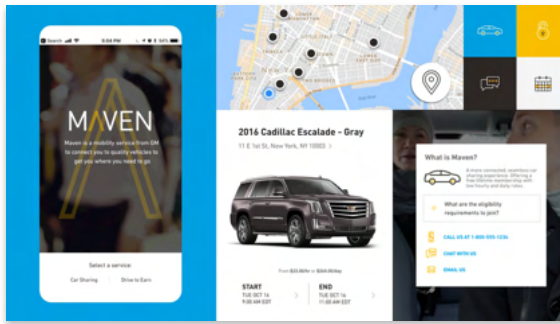
Thank you, and please enjoy!

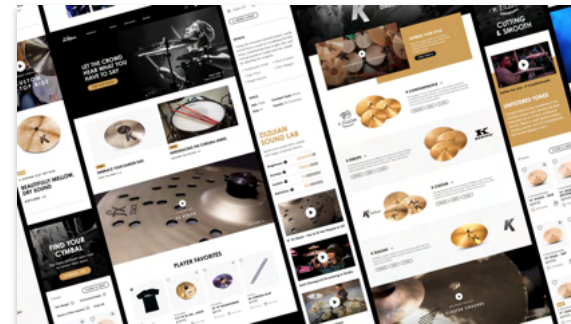# I. **ABOUT ME**

II. **FEATURED PROJECTS**

Integramed Fertility
Patient Portal & Practice Management System

GM Maven
Carsharing Mobility App & Service Enhancements

Zildjian Cymbals
Content-Rich Multibrand Ecommerce Experience

III. **ADDITIONAL WORK**
Enterprise • Intel

Profile

Seasoned UX researcher, strategist & product/service designer with 20+ years of diverse digital experience and a proven record of successful delivery across all stages of the product design process.

Champion for human-centered design who strives to deliver products and services that positively impact people's lives.

Portfolio ranges from creative brand experiences to sophisticated digital products and services, with experience spanning healthcare, mobility, fintech, commerce, technology, government and cultural venues.

Experience

Employment

May 2024 – Present, New York, NY
Lead Service Designer, Photon / Citi.

September 2012 – May 2021, New York, NY
Director, Experience Strategy & Design, Dentsu Creative.

March 2010 – June 2012, New York, NY
Senior UX Architect & Manager, K Street Partners.

October 2007 – March 2010, New York, NY
Associate Director, Experience Strategy & Design, Emerge.

October 2003 – October 2007, New York, NY
Digital Systems Engineer, Hayden Planetarium, American Museum of Natural History.

March 1999 – October 2003, Remote
Creative Technologist & UX Architect, Freelance.

Education

Sept 2022 - May 2023
University of Pennsylvania, Stuart Weitzman School of Design + School of Social Policy & Practice.
Executive Program, Social Innovation Design (XSD).

Sept 2000 - May 2002
New York University, Tisch School of the Arts, Institute of Emerging Media.
Masters of Professional Studies, Interactive Telecommunications Program (ITP).

Sept 1995 - May 1999
The College Of New Jersey, School of Humanities & Social Sciences.
Bachelor of Arts with Honors, English Literature & Linguistics. Minors in Media & Communication Arts, Philosophy.

My Work at Dentsu Creative

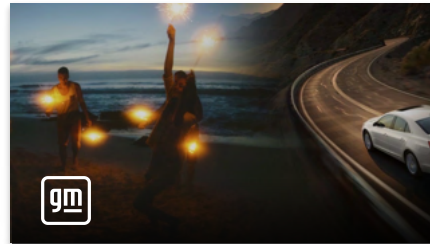## Unlocking the potential of businesses and brands through

Marketing & Communications

Building brands and creative experiences that engage people and motivate behavior

Ecosystems & Commerce

Constructing end-to-end experiences through platforms and systems that drive utility and transaction
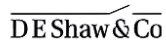

Products & Services

Creating and innovating new offerings and services that generate value and drive revenue

Transformation Consulting

Transformation Consulting to unlock exponential growth and drive change

Clients & Brands

GM · intel · U.S. AIR FORCE · enterprise · Zildjian · CISCO · AVIS

reebok · DIAGEO · COTY · SHISEIDO · la prairie SWITZERLAND · AMERICAN EXPRESS · TXU energy

Pfizer · J&J · PHARMAVITE · IntegraMed Fertility · Alcon · MSG · UMPQUA BANK

AllianceBernstein · DE Shaw & Co · Fitch Solutions · MSCI · TD Ameritrade · Citi · THE HEIDELBERG PROJECT

Kind Words

"Tony rules. He just flat out rules. He's one of those people that totally understands — and thrives on being right in the middle of — the magic intersection of rock solid strategic thinking and innovative UX."

"I don't know that I've ever worked with someone who embeds themselves into a client's business as much as he does, which allows him to build strong client relationships."

"He's caring and compassionate with his team; he listens and empathizes with the clients; and he knows exactly what is needed to achieve the project's goals."

"Tony's super power is solving problems through human empathy."

Featured Projects

Tony Owens • Human-Centered Product & Service Design Leader

These three projects showcase my skills and leadership approach across a range of industries and different types of design challenges. Each case study represents a project that I pitched, planned, managed and partnered in producing – from research, strategy and concept exploration to detailed design and delivery.
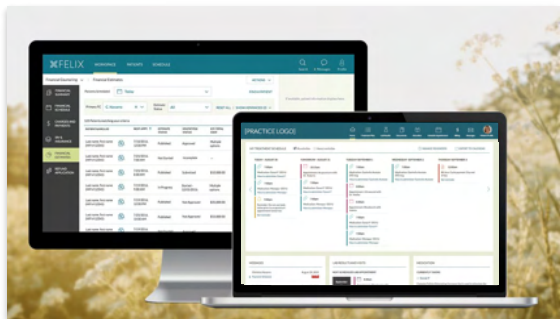
IntegraMed Fertility
Patient Portal & Practice Management System
Weighed down by an outdated, inefficient suite of legacy applications, IntegraMed partnered with my team to completely transform the experience for fertility patients and professionals.
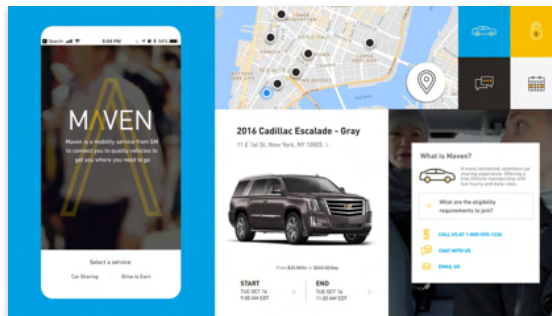
GM Maven
Carsharing Mobility App & Service Enhancements
Partnering with GM's Maven team, we elevated their carhsaring service and app experience by addressing pain points and envisioning features to realize Maven's vision of seamless mobility.
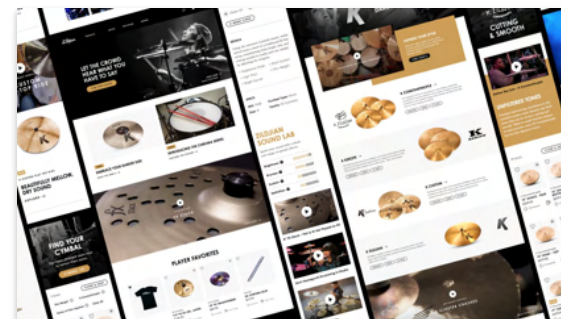
Zildjian Cymbals
Content-Rich Multi-Brand Ecommerce Experience
By reimagining how cymbals can be experienced online, we created a powerful brand commerce experience that's in tune with musicians no matter where they are in their lifelong journey.

IntegraMed Fertility

Patient Portal & Practice Management System

tonyowens@uxarchitect.net | www.tonyowens.net | linkedin.com/in/tonyo | 347.332.3030

With ever-increasing demand for fertility treatment, IntegraMed was well-poised to maintain and grow its leadership as operator of the largest fertility practice network in North America.

Weighed down by an outdated, inefficient suite of legacy applications, IntegraMed partnered with my team to completely transform the experience for fertility patients and professionals.

Together we created a modern, revolutionary digital ecosystem that offers both patients and providers the integrated tools, guidance and support they need to achieve the best fertility treatment outcomes.

PROJECT GOAL

Revamp and integrate IntegraMed Fertility's suite of fertility services applications.

MY ROLE

Pitch & Proposal
- Led product strategy and vision
- Instrumental in planning and scoping

Discovery & Concept Exploration
- Led planning of the UX research and design approach
- Facilitated UX research, concept design and testing activities
- Collaborated with UX team in analyzing research, summarizing insights, crafting scenarios and designing a conceptual prototype

Detailed Design & Delivery
- Planned and led the design process, facilitating Agile design sprints with cross-functional teams across parallel threads of work
- Shaped requirements, managed priorities and maintained the vision while partnering with the team to deliver high-quality designs

COLLABORATORS

Creative Director + Team (3-6)	Chief Marketing Officer
User Experience Team (4-12)	Executive Stakeholders
Functional Analyst	Subject Matter Experts (40+)
VP, Technology	IntegraMed Product Team
Technology Team	IntegraMed IT Group
Project Manager	Engagement Director

The Challenge

Delivering Excellence in Patient Care

IntegraMed offered a suite of third-party and custom digital tools to manage fertility practice operations, including billing/scheduling, medical records, lab management and a patient portal – but these outdated, inefficient tools had begun to hinder the company's mission.

With siloed systems and archaic interfaces that fell years behind clinical and technological advances, the patient journey was poorly supported, while professionals were forced to find workarounds and enter important data multiple times, distracting from delivery of best-in-class patient care.

With over 130 locations in its growing network, operational differences between fertility practices added complexity to the challenge, necessitating an adaptable design solution that would flex for each practice's unique needs.

Plus, their existing patient portal solution was generic, poorly suited to guiding patients through the complex clinical, financial and emotional aspects of the fertility treatment experience.
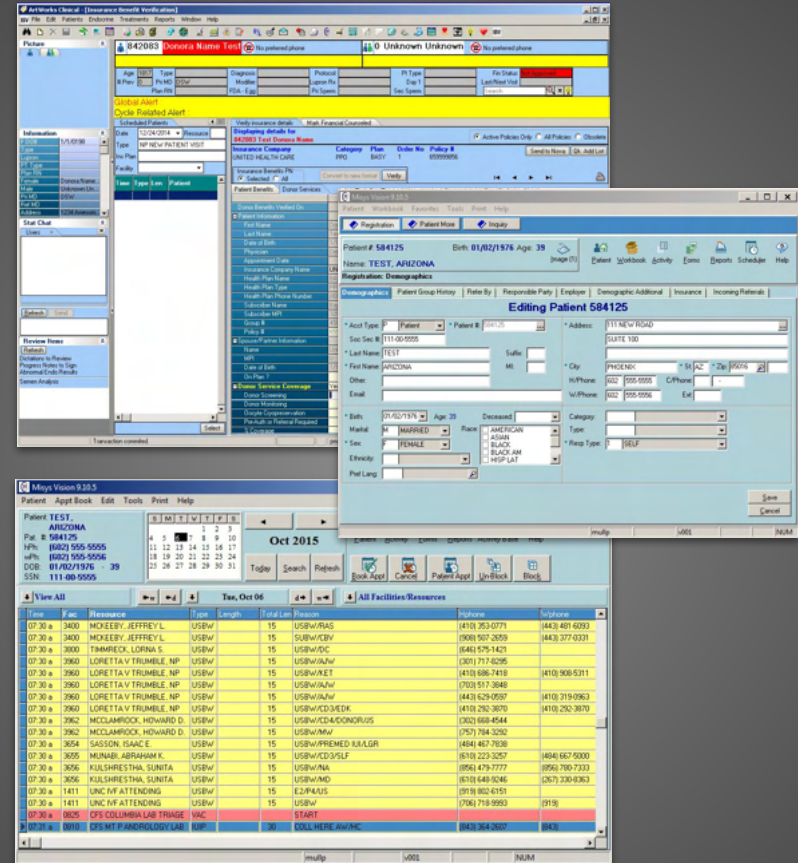
Before

Our Vision
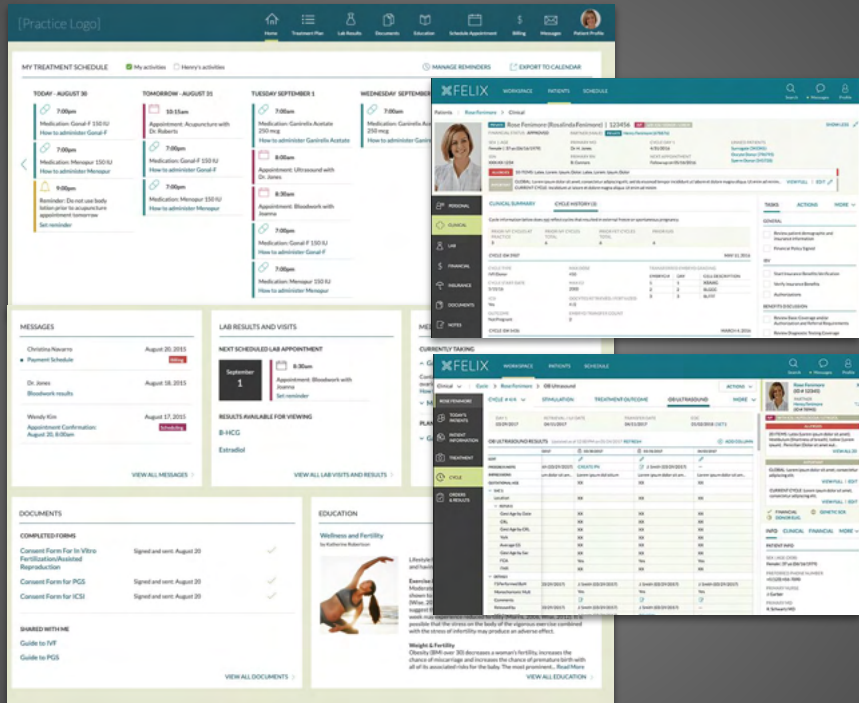
After

Revolutionizing Fertility Services

Our proposed vision was to create a next-generation platform custom-built for fertility services, providing complete support through the patient journey while empowering providers to focus on patient care.

Comprised of integrated patient and practice portals, this one-of-a-kind web platform would be designed to adapt for different practice needs and scale seamlessly as IntegraMed grows.

From price estimates to paperwork, from treatment planning to lab workflows and patient self-care routines, the new platform would create practice efficiencies and offer a level of patient support that would lead the way for the industry.

Beyond just an app design and build, IntegraMed engaged my team at Dentsu Creative to help them digitally transform their entire business.

Our Approach

To achieve these objectives, I proposed an initial 12-week project to research and define the product strategy and vision – the outcome of which would determine the strategic roadmap, requirements and plan for several detailed design projects in the iterative Delivery phase to follow.

12 WEEKS .... ITERATIVE (3 YEARS) ....

Discovery ⟶

Stakeholder Workshops

Patient Interviews

Fertility Practice Visits

System Demonstrations

Subject Matter Expertise:
- Clinical & Lab
- Admin & Financial

Heuristic Evaluation

Business Process Analysis

Market Trend Research

Functional Decomposition

Experience Strategy Brief:
– Current Research Findings
– Future Opportunities

Definition ⟶

Personas & Archetypes

Jobs-to-be-Done

Patient Journey Maps

Service Blueprints

User Stories & Requirements

Expert Collaboration

Creative Mood Boards

UX/UI Concept Exploration

User Scenarios

Conceptual Prototype

Concept Validation

Roadmap & Delivery Plan

Delivery ⟶

Style Guide

Detailed Wireframes

Interactive Prototypes

Detailed Design Comps

Design Pattern Library

Functional Specifications

Data Dictionary

Expert Validation

User Acceptance Testing

Training Materials

* Key activity highlighted in portfolio

18

The Discovery Phase

To understand Integramed's business goals and assess the existing patient and provider experiences, our process included research gathered through several means.

Stakeholder Workshops
Context, goals and opportunities from the executive leadership team

Patient Interviews
One-on-one discussions with past patients about their fertility journey

Practice Visits
Observing daily system users in their natural setting, performing real work using the system

Subject Matter Experts
Workshops with experts, from clinical to lab to administrative, to learn about their roles and interaction with systems

Market Trend Research
Assessment of market, customer and competitive trends, and review of leading competitors' systems

System Demonstrations
Knowledge transfer sessions to demonstrate the complete capabilities of existing systems

Heuristic Evaluation
Expert analysis of current user interfaces based on fundamental usability standards

Business Process Analysis
Analyzing how jobs are done today to find ways that the system can enable better operations in the future

Practice Visits

The project began with an ethnographic study of the service – traveling to fertility practices across the US to shadow doctors, nurses, lab techs, administrators and patients, uncovering process interdependencies and nuances that would inform our strategy.
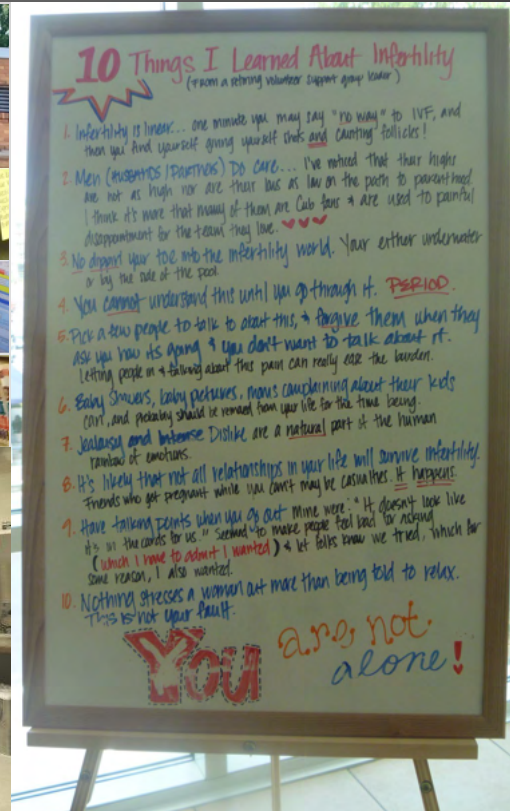
Workshops & Interviews

For a full month during discovery, I planned and facilitated workshops and activities with stakeholders, patients and practice professionals to build a shared understanding of IntegraMed's current service experience and ecosystem.

Week 1

	Monday	Tuesday	Wednesday	Thursday	Friday
AM	Full Day	Full Day	Full Day	- Document Review & Workshop Prep	Full Day
PM	- Document Review & Workshop Prep	- Document Review & Workshop Prep	- Document Review & Workshop Prep	- NewStart Executive Kickoff (1 hr)	- Document Review & Workshop Prep

Week 2

	Monday	Tuesday	Wednesday	Thursday	Friday
AM	- NewStart Research Phase Kickoff & Orientation (1 hr) - Tech Overview: Infrastructure & Devops (2 hrs)	- Workflow Spotlight: Physicians/Nurses (2 hrs)	- Workflow Spotlight: Front Desk (1.5 hrs) - Tech Overview: Misys Vision (1 hr)	- Workflow Spotlight: Call Center (1 hr) - Tech Overview: PRM/Salesforce (1 hr)	- 1-2 breakout topics TBD (1 hr each)
PM	- NewStart Users & the Service Ecosystem (1 hr) - INMD's Current Software Service Model (1.5 hrs)	- Workflow Spotlight: Lab/Cryo (2 hrs) - NewStart Branding & Positioning (1 hr) - Tech Overview: ARTworks (2 hrs)	- Workflow Spotlight: Financial Counseling (2 hrs) - Tech Overview: TRAK/AIO (1.5 hrs) - Tech Overview: Patient Portal (1 hr)	- Workflow Spotlight: Patients (1 hr) - Workflow Spotlight: Exec Directors (1.5 hrs) - Tech Overview: Microstrategy (2 hrs)	- Patient Interview 1: Core Fertility (1 hr) - Prep for Week 3 activities.

Week 3

	Monday	Tuesday	Wednesday	Thursday	Friday
AM	- Core Fertility Patient Journey (1.5 hrs)	- User Session: Physicians & Nurses 1 (1 hr) - Tech Deep Dive: ARTworks (2 hrs)	- User Session: Financial Counselors 1 (1 hr) - Tech Deep Dive: TRAK/AIO (1.5 hrs)	- User Session: Lab Personnel 1 (1 hr)	- 1-2 breakout topics TBD (1 hr each)
PM	- Secondary Patient Journeys (1.5 hrs) - Patient Interview 2: Secondary (1 hr)	- User Session: Physicians & Nurses 2 (1.5 hrs) - Patient Interview 3: Core Fertility (1 hr) - Tech Deep Dive: Misys Vision (1 hr)	- User Session: Financial Counselors 2 (1.5 hrs) - Patient Interview 4: Core Fertility (1 Hr) - Tech Deep Dive: Patient Portal (1 hr)	- User Session: Lab Personnel 2 (1.5 hrs) - Patient Interview 5: Secondary (1 hr)	- Any additional secondary patient interviews (1 hr each) - Prep for week 4 activities

Week 4

	Monday	Tuesday	Wednesday	Thursday	Friday
AM	- User Session: Front Desk 1 (1 hr)	- User Session: Call Center 2 (1.5 hrs)	Full Day: - Practice Visit (small practice): ○ Front Desk ○ Physician ○ Nurse	Full Day: - Practice Visit (large practice): ○ Financial Counselor ○ Lab ○ Call Center	- 1-2 breakout topics TBD (1 hr each)
PM	- User Session: Front Desk 2 (1.5 hrs) - User Session: Call Center 1 (1 hr)	- User Session: Exec Directors 1 (1 hr) - User Session: Exec Directors 2 (1.5 hrs)			- Wrap up. - Begin analysis.

Stakeholder Workshops

Partnered and collaborated with IntegraMed's executive leadership, product and technology teams to understand the system's current users, ecosystem, touchpoints, capabilities and challenges.

Patient Interviews

Gained insight from patients who had experienced IVF, egg freezing, donation and/or surrogacy – including those from the LGBTQ+ population – to learn their unique experiences of the fertility journey.

40+ Practice Experts

Examined and reimagined practice operations, roles, responsibilities, workflows and interactions with systems as well as with patients, identifying emotional, clinical, financial and other factors that can arise.

Process Mapping

I facilitated workshops with our team of practice operations experts to review process maps defining the entire business, reconciling operational differences between practices while imagining ways that a new system might enable greater efficiency and focus on patient care.

By the end, we had created a completely new set of unified, digitally-enabled business processes that would ultimately be adopted across the entire network.
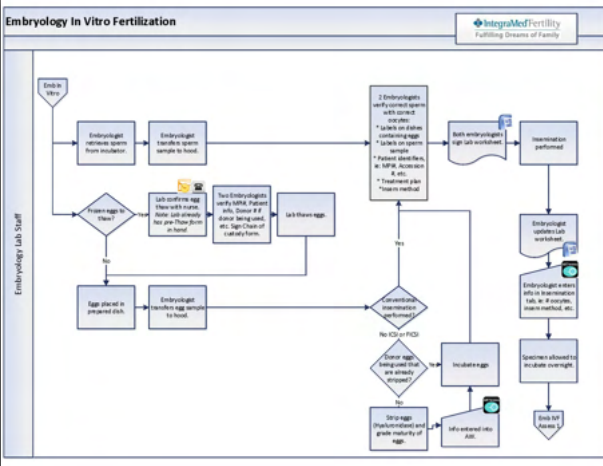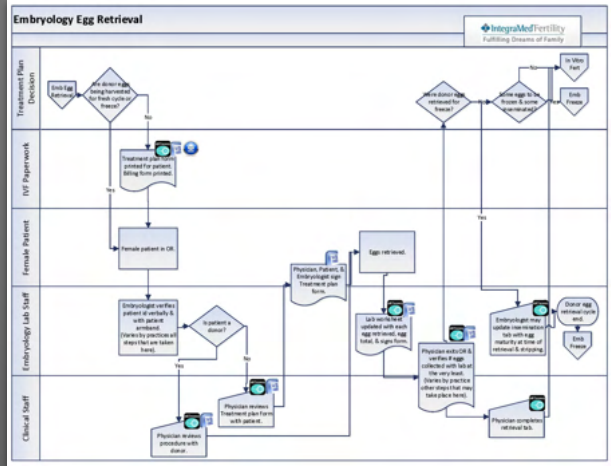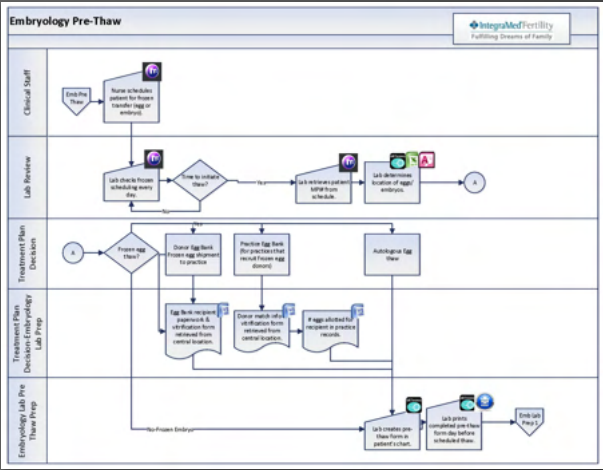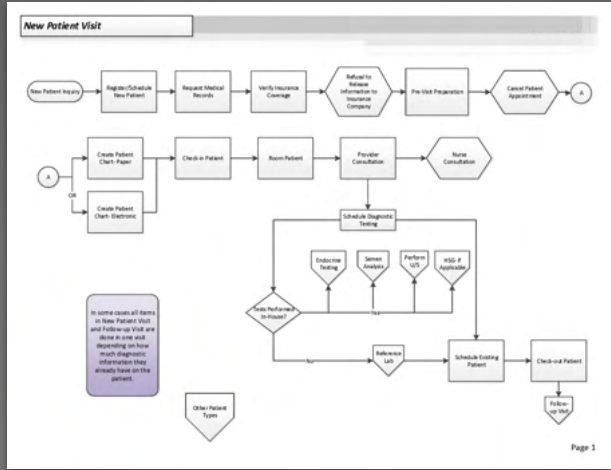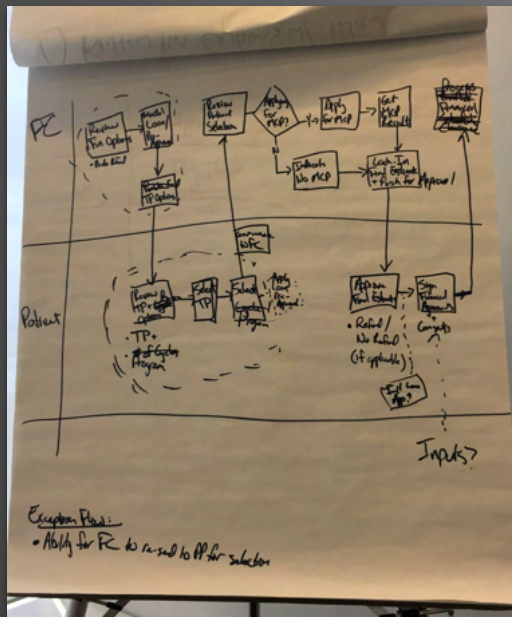
Heuristic Analysis

We conducted an expert analysis and assessment of their current interfaces based on fundamental usability principles and standards.

Research Findings

From these research activities, we gained a strong understanding of goals, needs and opportunities for Integramed's business, its network of fertility practices and the patients they serve.

THEMES	Patient Pain Points	Practice Inefficiencies	System Deficiencies
New Patient Acquisition		●	●
Patient Education	●		
Expectations Management	●	●	
Patient / Practice Communication	●	●	
Internal & Third-Party Communication	●	●	●
Lack of System Integration		●	●
Appointment Scheduling		●	●
Onsite Patient Flow Management	●	●	●
Complete View of the Patient's Journey	●	●	●
Abundance of Paper		●	●
Manual Workarounds		●	●
Process & Approach Differences		●	●
System-Workflow Disconnect		●	●
System Access		●	●
Chain of Custody	●	●	●
Reporting Challenges		●	●
Patient Self-Service	●	●	
Circle of Care Support	●		

18 key themes

capturing patient and practice pain points caused or exacerbated by system deficiencies

Research Findings

My team and I summarized these findings and provided a number of strategic recommendations in our Current State Assessment, laying out a high-level strategic framework for our future system to provide a foundation for the design work to come.

Abundance of Paper
Abundance of paper reduces staff efficiency and poses management concerns

ENCOUNTER FORMS — Each day, paper encounter forms are given to patients who carry them through the practice as various staff mark services provided. Patients then return them to the front desk for the related charges to be captured in systems.

MEDICAL RECORDS — Charts are also printed for clinicians to use during clinical encounters. For new patients, dedicated staff print these a week in advance; for existing patients, these charts are often stored and carried to the front desk so that they are available for follow-up appointments.

HARD TO MANAGE — In both cases, significant time is spent printing, preparing, moving, processing and discarding these paper records. The practices that have shifted to digital forms and records feel that it was a worthwhile investment that quickly generated returns.

HARD TO LOCATE — The physicality of these charts and forms makes timely retrieval of these documents a challenge. Encounter forms are often lost by patients in transit, and practices maintain libraries of medical records in basements and warehouses.

Chain of Custody
Chain of custody is critical to patient care and leaves no room for error

SAFEGUARDING EACH PATIENT'S FUTURE — The eggs, embryo and sperm that labs collect and store are extremely valuable. Each represents the possibility of family for each patient. As such, there's no room for error when handling these specimens.

RELIANCE ON PAPER — While lab data can be captured in ARTworks, lab personnel track much of the process on paper to avoid any lack of system reliability. Time spent transferring paper records into ARTworks creates a lag in availability of results to both clinicians and patients.

KEEPING UP WITH THE TIMES — Custody tracking gets more complex as social and clinical trends impact each embryo's fate. Better freeze/thaw tech lengthens the chain; increasing use of frozen donor eggs introduces additional parties. ARTworks struggles to keep up.

HANDOFFS & SHIPMENTS — PGD/PGS is conducted at third-party labs, which requires shipping of specimens per third-party labs requirements. This adds even more complexity and is often tracked on paper. This is one of many scenarios where shipping impacts chain of custody.

Patient / Practice Communication
Gaps in communication between patients and practices

IS NOT EASY — Patients and practice often play phone tag. An easy way to exchange information asynchronously can increase efficiency and improve overall communication. Many staff currently use paper call logs to keep track of communications.

UNCLEAR WHO TO CALL — Between the physician, nurse, financial advisor, the call center, CBO and Attain, patients do not always know who can answer their questions.

CONFUSING DOCUMENTS — Patient-facing documents such as billing statements and treatment estimates can be confusing due to their unfriendly format and/or lack of context-specific information.

PRACTICE NOT ALWAYS PROACTIVE — Patients complain about having to hunt down people for information instead of the practice calling them.

Complete View of the Patient's Journey
Fully understanding the patient journey within the system is impossible

SEEING THE FULL PICTURE — Whether clinical or financial, staff often need to look at the full picture of a patient's journey. Financial staff want an easy way to view next steps in treatment for scheduling, and clinical staff often need to see what's covered by insurance.

NO SINGLE SOURCE OF TRUTH — In order to get a holistic view of the patient's experience, staff often have to piece their view together from multiple systems, and often the views captured in those systems do not agree.

INCONSISTENT PATIENT GUIDANCE — A lack of data integrity and consistency in patient information can lead to uncoordinated interactions as patients transition from one stage to another.

PATIENT SATISFACTION — The patient care module and Press Ganey surveys were deployed in an attempt to create a unified picture of patient touchpoints and satisfaction. This module helps, but staff still desire a more clear and systematic way of tracking patient satisfaction.

Manual Workarounds
Practices use alternatives to make up for system deficiencies

FINANCIAL ESTIMATES ARE A PROCESS — With various treatment possibilities, insurance coverage and patient payment choices, financial estimates often require preparing multiple price sheet options using from multiple sources.

MANUAL NOTIFICATION METHODS USED — Sticky notes and Outlook are frequently used as reminders for staff to follow-up with patients. Notifications to colleagues are done through global system alerts, email and phone calls.

PRINTABLE DOCUMENT FORMATS NEEDED — Preparing patient statements and medical records often takes several days for staff. Current documentation includes information that is not meant to be patient-facing.

Appointment Scheduling
Complexity in managing multiple appointments across multiple locations

MULTIPLE SYSTEMS — When scheduling appointments, practice staff need to do this once in Misys and again in ARTworks. To make matters worse, some types of events only show up in one and not the other.

MULTIPLE APPOINTMENTS — Many patient visits require multiple events to be scheduled: time with the doctor, the lab, a separate appointment for their partner. These visits are often planned on paper, then rapidly entered in systems to ensure that time slots remain available.

MULTIPLE LOCATIONS — Some practices use third-party software like Lightning Bolt to plan out which locations their physicians and staff will need to be. Schedulers often need to check this resource as well before booking patient appointments in Misys.

Strategic Opportunity Summary

Our research helped us focus on the right set of strategic opportunities for the platform in order to ensure that all core stakeholder needs are met.

Strategic Tenets

Create intuitive tools that drive practice efficiency

Enrich and support the patient experience

Implement an adaptable platform

Increase practice profitability

Opportunities
Create intuitive tools that drive **practice efficiency**

- **Improve practice facing systems**
  - Easier way to view and analyze data within the system
  - Support for additional data currently recorded outside the system
- **Automate tasks and leverage business logic**
  - Reduce data redundancy
  - Improve speed of completing daily tasks
  - Reduce amount of steps needed to complete tasks
- **Make communication and collaboration seamless for everyone**
  - Within practices (inter- and intra-team collaboration)
  - With patients throughout their journey
  - With external entities (labs, outside physicians, etc.)
- **Streamline chain-of-custody processes & reduce chance for error**
  - Use digital tools to assist in automation
- **Enable sharing of tools and templates across practices**
- **Extend tools to mobile platforms**
  - Access common tools while on the go (e.g. schedules)
  - Digitize commonly used forms to increase speed during appointments

"Need a high level of service as well as communication … and there is the ability to do that from a digital perspective."

— Home Office Employee

Opportunities
Implement an **adaptable platform**

- **Adapting to new / different practice structures**
  - Customization of modules / key features
  - Flexibility in assigning roles and entitlements
  - Support for foreign locales
- **Support for all patient types (LGBT, etc.), with room to grow (multiple party partnerships)**
- **System adaptable to changing medical trends**
  - Creation and customization of clinical flowsheets
  - Management of business rules to meet regulatory needs
  - Standardization and automation of chain of custody practices
  - Removal of hard coded limitations (4 medication limit in stim grid)

"The system was designed so long ago that same-sex couples were not very common at all so it's designed really for a male and a female."

— Home Office Employee

Opportunities
Build, enrich and support the **patient experience**

- **Provide more tools for end patients and their support network**
  - Self-service
  - Patient education
  - Automation of billing
- **Provide additional communication tools**
  - Digital doctor-patient relationships
- **Create a personalized experience**
- **Provide information clearly and at appropriate times**
  - Better coordination between clinical and financial staff in managing patients' expectations regarding treatment
  - Ensure patients have visibility into next steps in treatment

"Fertility doesn't discriminate."

— Home Office Employee

Opportunities
Increase **practice profitability**

- **Acquisition**
  - Create systems for prioritizing high-value doctor referrals
  - Provide doctors with materials that help inform and attract patients
- **Retention**
  - Create more systematic approaches towards tracking patient satisfaction
  - Maintain better visibility into patients who have delayed or halted treatment
- **Reporting**
  - Make real-time data easily accessible and digestible
  - Provide flexible tools for analyzing business processes to identify opportunities for cost reduction
- **Chain of custody**
  - Reduce potential revenue loss through increasing reliability and effectiveness of specimen tracking

"The more time it takes to get back to the patient, the harder it is to retain that patient."

— Home Office Employee

Core Stakeholder Needs

The discovery process established a shared, holistic understanding among the team of our core stakeholders' needs – most importantly, those of practice professionals and the fertility patients that they serve.

INTEGRAMED FERTILITY

A modern system that aligns with current trends in medicine, technology and society, serving both patients and practices effectively while keeping costs low.

FERTILITY PATIENTS

Clear expectations, provided proactively; self-service tracking tools; a feeling of personalization, support and being in control during a complex, difficult emotional journey.

PRACTICE PROFESSIONALS

Connected systems that talk to each other; integrated tools that align with the way that they do work and reduce the need for workarounds.

NEWSTART
Conceptual Prototype

The Definition Phase

Once the Discovery research was complete, we created design artifacts to document our learnings and envision ideas for what this revolutionary new platform could be.

Personas
Relatable, research-informed profiles to enable shared understanding of user goals and behaviors

Behavioral Archetypes
User behavior analysis focusing on types of work done regardless of role (i.e. admin tasks by nurse)

Journey Maps
A story-driven graph of a typical person's (or persona's) experience, interactions and critical moments with a product or service

Service Blueprints
A graph describing key service delivery elements – people, processes, systems, artifacts – that enable a patient's journey

Creative Mood Boards
Creative explorations intended to explore high-level look, feel and style prior to actual screen design

UX/UI Concept Exploration
High-level design of key screens sufficient to establish consensus on the overall product vision

User Stories & Requirements
User-centered descriptions of key tasks and needs that are used as acceptance criteria for design and testing of features

Conceptual Prototype
An interactive model of key screens and journeys built to share and validate early working concepts with broader audiences

Mapping Patient & Provider Journeys

We mapped the fertility patient and provider experiences to establish a holistic view of the patient journey and how different roles converge and intersect in the delivery of patient care – enabling us to imagine new opportunities for improving the service at every stage.

Personas & Archetypes

Captured learnings about each role in the fertility ecosystem, including doctors, nurses, embryologists, financial counselors, patients and more
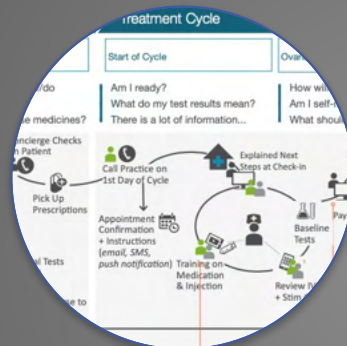
Patient Journey Maps

Modeled the thoughts, feelings, activities and interactions that a patient might typically experience throughout the course of the fertility treatment journey
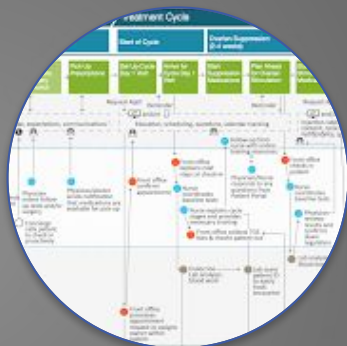
Fertility Service Blueprints

Mapped the roles, activities and systems involved at each stage of patient care to streamline practice operations while delivering better patient experiences and outcomes

Scenario Development

Outlined critical scenes from each roleplayer's viewpoint, developing key narratives, use cases and requirements to guide concept design and prototyping

Personas & Archetypes

The provider personas included a 'Behavioral Profile' chart to depict how much one's role might vary depending on practice size – for example, greater financial or patient-facing duties for an embryologist at a smaller practice versus at a larger one.
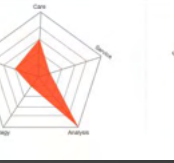
Lens

"Setting expectations and giving people as many touch points they can have as far as feeling like they have control in the process"

"The person who made all the difference for me was the nurse coordinator. She sort of held my hand through the process because there are so many steps to go through."

"One of the things I really liked was the portal system [...], because a lot of times I could get on there and check my lab results and they didn't have to call me. I could check myself and then I send an email to my doctor from there and she'd respond right back."

"We were extremely lucky: we did one round of IVF and I had something like 17 magnificent follicles and they put 2 back in and one took and we still have 4 frozen."

Fertility Journey

Legend ·····> Optional Step ⊗ Key Milestone in Patient's Journey

Stage

| Preparing for Cycle | Treatment Cycle |

| Preparation for Treatment Cycle | Start of Cycle | Ovarian Suppression (2-4 weeks) | Ovarian Stimulation (8-12 days) | | Ovarian Induction & Egg Retrieval | Fertilization - 3-5 days | Transfer |
| | | | Self-Monitoring | Cycle Monitoring (Day 5-end) | | | |

Thinking

| What else do I need to know/do before I start? What do I do with all these medicines? | Am I ready? What do my test results mean? There is a lot of information... | How will medicine affect me? Am I self-monitoring correctly? What should I be looking for? | What do my test results mean? How do I manage my medicine schedule? How do I manage my time and appointments? | How will the procedure feel during and after? What to expect? Will I have enough viable eggs? | How many eggs will get fertilized? How well are my embryos developing? I hope the embryos are normal... |

Doing

Review Calendar Online & Educational Resources

Concierge Checks on Patient

Pick Up Prescriptions

Complete IVF Workup Requirements, Additional Tests and/or Surgery, if needed

Message from nurse to pick-up medications

Self-Monitor Tools & Tutorials

Nutrition Guidelines

Mobile App

Patient Portal

Call Practice on 1st Day of Cycle

Appointment Confirmation + Instructions (email, SMS, push notification)

Training on Medication & Injection

Review IVF Calendar + Stim Grid

Access Training Videos and Medication Info

Explained Next Steps at Check-in

Start Medication

Baseline Tests

Pay TOS fee

Appointment Reminder + Prep Checklist

Self-Monitor

Monthly Bill Pay online

Lab Results + New Prescription Notification

Tests to Confirm Down-regulation & Begin Ovarian Stimulation

New Medications and Dosage Adjustment

Cycle Monitoring

Monitoring Tests Every 1-2 days

Add/adjust medications, if needed

Lab Results via Portal & Phone

Patient Portal

Mobile Medication Reminders Throughout The Day

Partner Reminder to Start Preparing for Collection

Lab Results + Doctor/ Patient Communication

Follicle Maturation Achieved

Self-administer Pregnancy Test at Home

HCG

Sperm Collection

Nurse Sends HCG Education to Portal + Consent Form for Egg Retrieval

Egg Retrieval

Pre-Op

Post-Op

Procedure

Eggs Fertilized in Lab

Embryologist monitors embryo development daily

Daily reports provided to the patient

Update from Doctor on Egg & Sperm Count and Quality + Next Steps

Excess Embryo Decisions

Transfer

Pre-Op

Post-Op

Procedure

MEDICATIONS — Pick Up All Prescriptions Ordered by Doctor

contraception pills — 2-4 weeks
Lupton injection—14-17 days before stim — lower dosage
multiple stim meds — 8-12 days — HCG injection administered
Luteal Phase Support

Feeling

ANTICIPATION, SUPPORT, GUIDANCE ANXIETY

PREPARED, INFORMED NERVOUS

SAFE, INFORMED, SUPPORTED, IN CONTROL NERVOUS

SECURITY, HOPE, ANTICIPATION, SUPPORT ANXIETY, FEAR

Insights

May meet with social worker/genetic counselor at this stage
If using sperm bank, donor selection may happen at this stage

This may be a group class or a 1-to-1 training with the IVF nurse. Our research indicates that patients prefer the latter.

Review not only how the calendar works but also how to use it on the patient portal as well as within the mobile app.

Logical continuation of the in-person training that enables patients to access relevant information on-demand

Advised if ready to begin ovarian stimulation. Any medicine and dosage updates are communicated directly and then sent to the portal.

If doing IUI, patient would undergo insemination at this point and move straight to the waiting period stage (next page).

Additional procedures such as ICSI/PICSI may be recommended based on the results.
If elected, PGD is performed at this time. Results are communicated by the physician and then posted to the patient portal.

This transition assumes a fresh IVF cycle. In other cases, embryo freezing may be required and patient would come back for transfer on next ovulation cycle.

Opportunities

Proactive followup by Concierge after treatment plan is approved and before their cycle has begun to offer personalized guidance and support.
Additional personalized support via

Personalized instructions/checklist to prepare patient for practice visit.
In-person guidance and support for new patients leveraging tablet-based content to enhance communications.

Appointment and medication reminders via patient portal, mobile app and SMS.
Tools for self-tracking cycle data and treatment requirements via Patient

Self-serve check-in/check-out process and TOS payment collection targeted to morning cycle monitoring patients to streamline visits and reduce front office wait times.
Easy/fast option for making TOS payment via self-serve kiosk

Ability for clinical staff to prepare and deliver personalized instructions on important next steps as well as facts and tips regarding upcoming procedures via Patient Portal.

Streamlined collection of pre-operative interview responses via tablets integrated with patient records, enabling clinical staff to spend more time focused on the patient's needs rather than the system

Ongoing updates regarding embryo development steps and observations sent to Patient Portal for independent review following discussion and approval by Physician/Nurse.

Analysis of this portion uncovers opportunities to improve the patient experience and practice efficiency through curated education, intuitive workflows, real-time data, smart notifications and process tracking tools.

Touch points/actions by role: Patient • Call Center • Fin Counselor • Nurse/Physician • Front Office • Lab • Concierge • System • Non-INMD

Channels: Phone Call • Email • SMS • Mobile App • Tablet • Acq. Acquisition Site • Patient Portal • Ref. Referral LP • Self-Serve Kiosk

Stage

Preparing for Cycle		Treatment Cycle					
Preparation for Treatment Cycle		Start of Cycle	Ovarian Suppression (2-4 weeks)	Ovarian Stimulation (8-12 days) — Self-Monitoring / Cycle Monitoring (Day 5-end)	Ovarian Induction & Egg Retrieval	Fertilization & Development (3-5 days)	Transfer

Patient Actions

- Review Calendar & Next Steps
- Complete Add'l Tests & Surgery (if needed)
- Pick Up Prescriptions
- Set Up Cycle Day 1 Visit
- Arrive for Cycle Day 1 Visit
- Start Suppression Medications
- Plan Ahead for Ovarian Stimulation
- Start Stimulation Medications
- Start Monitoring Visits
- Review Monitoring Test Results
- Plan Ahead for Induction & Retrieval
- Self-Perform Pregnancy Test
- Go for Retrieval
- Review Retrieval Outcome
- Monitor Embryo Development
- Plan Ahead for Embryo Transfer
- Go for Transfer

Touch Points

Request Appt — Reminder — PP and/or
Manage calendar, expectations, communications

Request Appt — Reminder — PP and/or
Education, scheduling, questions, calendar tracking

Request Appt — PP and/or
Injection videos, educational content, cycle tracking, notifications, questions

Cycle tracking, notifications, test results online

Next steps, questions, scheduling

Questions, cycle tracking, training, next steps

Reviews lab results — PP

Receives call on retrieval results

Receives daily embryo updates from doctor

Notified by doctor/nurse about transfer appointment time and instructions

Follow-up from nurse with online training resources

Checks in/out via self-serve kiosk

Front Stage Actions

- Physician/Nurse responds to any patient questions
- Physician orders follow up tests and/or surgery
- Physician/doctor sends notification that medications are available for pick-up
- Front office confirms appointment
- Front office explains next steps at check-in
- Nurse coordinates baseline tests
- Nurse explains cycle stages and provides necessary training
- Physician/Nurse responds to any questions from Patient Portal
- Front office checks in patient
- Nurse coordinates baseline tests
- Physician reviews results and confirms down regulation
- Front office collects TOS fees & checks patient out
- Nurse performs tests
- Nurse provides pro-active education, addresses questions and schedules appointments
- Nurse administers HSG injection and provides instructions in person as well as by sending resources to the PP
- Physician/Nurse: Accepts Patient, Confirms Consents, Performs Retrieval
- Physician/Nurse posts to PP
- Physician reviews retrieval outcome and communicates it to patient
- Physician reviews embryo data and provides daily updates to patient
- Nurse/Physician schedules transfer procedure
- Nurse preps patient
- Physician Performs Transfer Procedure
- Brings to physician in OR
- Concierge calls patient to check in proactively

Line of Visibility

Back Stage Actions

- Physician approves calendar & orders medications
- Endocrine Lab analyzes blood work
- Lab scans patient ID to easily track encounter
- Front office processes appointment request or assigns owner within system
- Lab analyzes blood work
- Lab prepares blood work
- Lab techs perform testing on site
- Shipped to outside lab, if necessary
- Physician reviews results
- Embryologist: Analyzes and documents eggs, Analyzes sperm, Fertilizes eggs
- Andrology Lab collects and preps sample
- Embryologist monitors & documents embryo development
- Flag in system and inform doctor when embryos are ready for transfer.
- Embryologist (+1) verifies the embryo on catheter
- Embryologist (+1) verifies no embryo on catheter

Line of Internal Interaction

Support Processes

- Unfeasible appointment requests are automatically queued for follow up
- Test results are immediately available to clinical team
- Encounter data tracked via tablet and immediately available in systems. Simplifies charge entry
- TOS fees collection is automatically merged and reconciled with other payment streams
- Self-tracking patient data is available for physician/nurse to review/comment in real time
- Lab ordering module tied to external labs
- Digital chain of custody automates link to patient and presents embryologists with smart, context-appropriate work flows
- Results & observations logged and immediately available in system
- Chain of custody scanning
- Specimen photography
- Tablet-based work flows
- Digital encounter tracking
- Real-time data to physicians and charge entry

Insights

- Physicians have preset calendar templates for different treatment protocols
- Online appointment requests are tagged by type and can be automatically prioritized accordingly, so that time-critical appointments can be addressed first
- Wait time tracking enables follow up on missed checkouts and collections
- Helps streamline TOS charge process
- Self-serve kiosk streamlines and optimizes patient flow
- Results from external labs become immediately available to lab, physician and nurse within NewStart via the external lab module
- Technology helps increase the visibility of chain of custody verification steps to patient during transfers

Opportunities

- Auto-population of patient treatment calendars using preset templates once treatment plan is selected/approved, modifiable to support unique patient needs.
- Collection of curated education and next-steps templates tied to key transition points in the treatment journey, delivered via the Patient Portal and modifiable as needed.
- Tablet-based access to medical charts/records to support and drive transition to paperless practice, with easy print capability for clinical staff who prefer paper.
- Self-serve kiosk that enables quick check-in, check-out and TOS payments, targeted to monitoring patients to streamline visits and enable front office to be more attentive
- Ability to assign ownership of tasks, duties and patient service tickets to relevant parties.
- Intuitive, workflow-driven flowsheets for clinical/lab staff to capture observations and data points during perioperative and analytical procedures.
- Internal scheduling templates for patient visits that involve multiple encounters (e.g. transfers involving both partners, physician and lab)

32

Prototype Scenario Development

1 Patient Journey
Actor(s): Core Fertility Patient, Financial Counselor, Clinical and Admin Staff [1 of 5]

A. Doctor Referral
Highlights at this stage:
1. Content/collateral provided to top referring doctors to attract new patients and drive awareness of online resources
2. Collateral contains unique code to access pre-acquisition patient portal for treatment education and financing information
3. Systematic tracking of physician referral metrics
4. Personalized/targeted educational content and acquisition/onboarding communications

Narrative Opportunities / Subtext
Enable doctors with tools to help patient acquisition. Reduce scanning of external referrals by providing online forms.

Flow Notes / Connections
External referrals affect Front Office staff - document scanning and data entry.

B. Preparing for First Consultation
Highlights at this stage:
1. Self-service registration and pre-treatment education via Patient Portal
2. Personalized overview of financial expectations based on pre-registration demographic information

Narrative Opportunities / Subtext
This could be a potential opportunity to highlight mobile experiences.
Can also highlight personalization and self-service.
Self-service forms for the patient applicant can reduce Front Office workload.

Flow Notes / Connections
Front Office might be alerted about application level of completion.

C. Arriving for First Consultation
Highlights at this stage:
1. Greeted by front office staff with patience and preparedness for first time patient visit
2. Digital capture of insurance card, past medical records and patient photos for portal profile
3. Setup of patient ID, fingerprint scanner or other unique identifier to enable easier management of patient encounters/flow

Narrative Opportunities / Subtext
Database of insurance coverage terms creates efficiencies and streamlines insurance verification for faster approval of treatment plans.
Patient identifier sets up story of paperless practice.

Flow Notes / Connections
Insurance verification details covered within front desk journey.

3 Physician Journey
Actor(s): Physician, Nurse, Embryologist, Front Office, Patients [1 of 4]

A. Morning Chart Review / Fert Report
1. Physician checks personal and team schedule
2. Patients expecting followup calls are automatically added to physician's to-do list, linking to patient records
3. Lab result readiness indicated in patient list, enabling physician to scan/prioritize
4. Physician assesses impact on patient's treatment next steps and documents changes
5. Based on staffing model and personal preference, physician can conduct own followup calls or assign to-do to nurse

Narrative Opportunities / Subtext
Highlights system integration, process management and intuitive workflows for physicians.

Flow Notes / Connections
Potential delegation to nurses, impacts front office and scheduling.

B. First Consultation
1. Physician receives an alert via system and/or mobile notifying the next patient is ready. This is tied to the scheduling system and check-in.
2. Reviews patient demographics and records gathered via patient intake forms
3. Patient Education dialog with physician
4. The physician leads a tablet-based fertility treatment overview of reproductive anatomy and treatment approaches
5. Physician demos Patient Portal, including a walkthrough of self-serve cycle tracking tools

Narrative Opportunities / Subtext
Education and planning materials from the patient portal may be repurposed / reformatted for tablet use in face to face meetings.
The Physician possibly introduces patient to mobile app for cycle tracking.

Flow Notes / Connections
Dovetails into patient journey and front office (patient reception)

C. Diagnostic Testing Prep
1. If testing occurs as followup appointment, physician receives alert to queue up incoming patient's records, treatment history and notes
2. Documents plan for diagnostic testing
3. Prepares relevant flowsheets to capture diagnostic test result data

Narrative Opportunities / Subtext
Highlights better system integration and intuitive workflows for physicians.

Flow Notes / Connections

1 Patient Journey
Actor(s): Core Fertility Patient, Financial Counselor, Clinical and Admin Staff [2 of 5]

D. The First Consultation
Highlights at this stage:
1. Tablet based overview of reproductive anatomy and fertility treatment approaches
2. Walkthrough of mobile stim grid, cycle tracking and treatment planning tools on Patient Portal

Narrative Opportunities / Subtext
Digital tools support practice-patient discussion. Tablets can provide second screen experiences that extend the desktop system and enable more natural F2F interactions

Flow Notes / Connections
Patient education highlighted in physician journey.

E. Diagnostic Testing
Highlights at this stage:
1. Physician scans unique patient identifier to automatically track patient flow during visit
2. Physician captures clinical data and billing codes via tablet; info captured by systems in real-time
3. Tablet-based walkthrough of initial ultrasound, treatment considerations and success probabilities
4. Access to test results via patient portal

Narrative Opportunities / Subtext
This could be a potential opportunity to highlight mobile experiences. Digital encounter tracking streamlines charge entry; builds story of paperless practice. Digital tools support practice-patient discussion.

Flow Notes / Connections
Patient education and digital encounter tracking highlighted in physician journey.

F1. Financial Counseling (In-Person)
Highlights at this stage:
1. Patient-friendly financial estimating tools to help facilitate post-consultation discussions
2. Real-time visibility of physician's treatment considerations to inform treatment estimating process

Narrative Opportunities / Subtext
This could be a potential opportunity to highlight mobile experiences.
Digital tools support practice-patient discussion.

Flow Notes / Connections

3 Physician Journey
Actor(s): Physician, Nurse, Embryologist, Front Office, Patients [2 of 4]

D. Diagnostic Testing
1. Scans unique patient identifier to automatically show patient medical charts/records and track flow of visit
2. Tracks encounter by tapping on services provided via tablet-based encounter form
3. Physician walks through ultrasound with patient and explains results
4. Test observations may be fed directly to NewStart, through medical system interfaces
5. After physician approval, analysis of test results and treatment plan recommendation delivered via patient portal

Narrative Opportunities / Subtext
Physician can highlight, capture and annotate items, sending them directly to the patient portal.
Encounter information is fed directly into the charge entry system, minimizing need for additional reviews and processing. Frequently used service and billing codes are highlighted.

Flow Notes / Connections
Checking test results is one of the primary use cases on the patient portal

E. IVF Treatment Prep / Pre-IVF Monitoring
1. Consents are electronically signed by the patient prior to treatment start
2. Streamlined ePrescription and lab order tools
3. Physician conducts ultrasound during monitoring; reviews results via tablet; also sent to portal
4. Physician reviews stim grid that shows history, bloodwork results and patient cycle tracking data
5. Graph shows hormone level indicating patient ready for retrieval; physician annotates lab results, documents next steps and delegates patient followup to nurse
6. Encounter logging

Narrative Opportunities / Subtext
Patient-facing information from the portal is also available on tablets in the practice setting

Flow Notes / Connections
Patient portal provides electronic signature capabilities to streamline consent

F. Egg Retrieval
1. Physician preps for pre-operative discussion by looking at stim grid
2. Uses clinical flowsheet (smart paper? tablet?) to capture data
3. Captures pre, intra and post-op data from anesthesiologist and nurse coordinator
4. Pre-operative interview

Narrative Opportunities / Subtext
Highlights better system integration and intuitive workflows for physicians.

Flow Notes / Connections

NEWSTART

Conceptual Prototype

An integrated, user-driven solution for managing
professional fertility services. This conceptual model
includes experiences for Physician, Embryologist,
Front Desk Staff, Executive Director and Patient.

START DEMO

Scenario-Driven Storytelling

Rose Fenimore

Age: 37

Rose has been trying to conceive a child with her husband for three years. Having not been successful the first two years, the couple accepted the need to seek professional help. Rose consulted with her OB-GYN who, given Rose's age, recommended going directly to a fertility specialist and referred her to Dr. Jones.

Dr. Jones

Role: Physician
Experience: 21 Years

Dr. Jones is a board-certified Reproductive Endocrinologist who is deeply committed to guiding his patients through the difficult journey of fertility treatment. Being a technology buff, he drives the adoption of modern tools at his practice so he and his staff can provide a personalized and seamless patient experience.
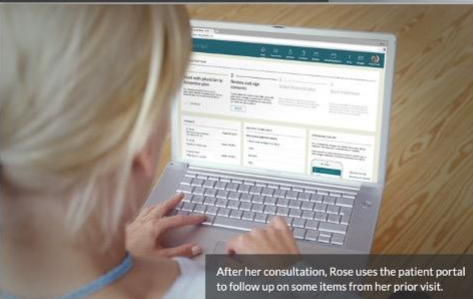
After her consultation, Rose uses the patient portal to follow up on some items from her prior visit.

Later, on the second day of her treatment cycle, Rose returns to the portal to get a better understanding of her week.
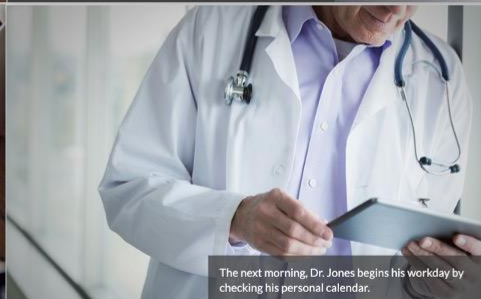
The next morning, Dr. Jones begins his workday by checking his personal calendar.

Later in the day, Dr. Jones is at his desk reviewing patient results.

Hi Samantha!
Are you ready to take the next step?

If you have any questions, **send us a message** or call us at **206-555-1234.**

DIAGNOSTICS   TREATMENT OPTIONS $ MANAGING COSTS

80%
of patients who enroll in
a Multi-Cycle Program
bring home a baby **

PAY PER CYCLE	2 CYCLE PROGRAM	3 CYCLE PROGRAM
(3 CYCLES)		
(2 CYCLES)	$22K / $24.5K	$26.3K / $29.7K
(1 CYCLE)		
	NO REFUND / 50% REFUND ELIGIBILITY	NO REFUND / 100% REFUND ELIGIBILITY

FELIX

08:00 AM   08:00 - 09:00 AM
Financial Consult (NPV): Jane Doe (ID #123456)

08:30 AM

09:00 AM   09:00 - 09:15 AM   Financial Consult (NPV)

09:30 AM   09:30 - 10:30 AM
Financial Consult
(NPV): Jane Doe
(ID #123456)

10:00 AM   10:00 - 11:00 AM
Financial Consult
(NPV): Jane Doe
(ID #123456)

10:30 AM

11:00 AM

11:30 AM   11:30 - 12:00 PM
Financial Consult (New Cycle)

12:00 PM   12:00 - 12:10 PM   Office Visit (Followup)

12:30 PM

1:00 PM

[PRACTICE LOGO]

Home | Treatment Plan | Lab Results | Documents | Education | Schedule Appointment | Billing | Messages | Patient Profile

MY TREATMENT PLAN

DIAGNOSIS
You have been diagnosed with unexplained fertility because the test results in your infertility workup are normal. There is no apparent cause for infertility.

PLAN
IVF/ICSI with PGD

PROJECTED
Day 6 Transfer, Fresh embryo

OOCYTE SOURCE
Rose Fenimore

SEMEN SOURCE
Henry Fenimore

1   Review and Sign Consents
Review and sign the consent forms for the treatment plan discussed with your physician. All consents must be completed before proceeding to next steps.

Below are the consent forms deemed necessary for your treatment plan, IVF/ICSI with PGD. Review the educational material associated with each consent form and sign when ready.

IVF INFORMED CONSENT

ICSI INFORMED CONSENT

PGD CONSENT FORM

The IVF Informed Consent Form provides an overview of the IVF process, including potential risks.

The ICSI Informed Consent Form details the ICSI procedure.

The PGD Consent Form outlines the specifics of genetic testing, along with potential associated risks.

WHAT IS IVF?
In Vitro Fertilization (IVF) is one of the most popular, and most effective, procedures for couples that wish to grow their families. As the most advanced procedure in the assisted reproductive technology repertoire it is complex, but can be extremely rewarding.

IVF is a procedure where the eggs and sperm are combined in the laboratory, incubated, and the resulting embryos are transferred into a woman's uterus. IVF procedures are further defined by the number of days an embryo is cultured before it is transferred. A 'cleavage stage' transfer follows a 2-3 day culture period, while for a blastocyst transfer the embryos are cultured for an additional 2-3 days. Since approximately half of 2-3 day embryos lack the capacity to develop more fully in vitro, further culture allows a self-selection of embryos that are more able to implant and less likely to be chromosomally abnormal. Since the best embryos grow to the blastocyst stage, the implantation rate per blastocyst transferred is twice that of 3-day-old embryos.

1 STIMULATION
Stimulate ovaries with medications

2 MONITORING
Do ultrasound and blood tests to determine if eggs are ready

3 EGG RETRIEVAL
Remove eggs from ovaries while under anesthesia

4 SPERM COLLECTION
Obtain sperm on day of egg retrieval

5 FERTILIZATION
Mix and incubate egg(s) and sperm in the lab to create an embryo

6 EMBRYO TRANSFER
Insert embryos into the uterus via a thin tube

7 PREGNANCY TEST
Take a blood test to determine pregnancy

LEARN MORE

[PRACTICE LOGO]

Home | Treatment Plan | Lab Results | Documents | Education | Schedule Appointment | Billing | Messages | Patient Profile

MY TREATMENT PLAN

DIAGNOSIS
You have been diagnosed with unexplained fertility because the test results in your infertility workup are normal. There is no apparent cause for infertility.

PLAN
IVF/ICSI with PGD

PROJECTED
Day 6 Transfer, Fresh embryo

OOCYTE SOURCE
Rose Fenimore

SEMEN SOURCE
Henry Fenimore

1   Review and Sign Consents   REVIEW
Review and sign the consent forms for the treatment plan discussed with your physician. All consents must be completed before proceeding to next steps.

2   Review and Sign Treatment Plan   REVIEW
Review and sign the treatment plan to officially begin your fertility journey.

3   Select Payment Plan and Financing   REVIEW
Understand the available payment and financing options and select a plan that works best for you.

PAYMENT PLAN OPTIONS
Based on your age, diagnostic tests and medical history, you are eligible for the following payment plans. Each plan also reflects your personalized cumulative chance of success.

SINGLE CYCLE
35% cumulative chance of success

2 CYCLES
53% cumulative chance of success

3 CYCLES
65% cumulative chance of success

SINGLE CYCLE	2 CYCLE PAYMENT PLAN NO REFUND	2 CYCLE PAYMENT PLAN WITH REFUND OPTION	3 CYCLE PAYMENT PLAN NO REFUND	3 CYCLE PAYMENT PLAN WITH REFUND OPTION
1 fresh + 1 frozen cycle	2 fresh + 2 frozen cycles	2 fresh + 2 frozen cycles	3 fresh + 3 frozen cycles	3 fresh + 3 frozen cycles
no refund, if unsuccessful	15% savings compared to 2 individual cycles without payment plan	10% savings compared to 2 individual cycles without payment plan	18% savings compared to 3 individual cycles without payment plan	16% savings compared to 3 individual cycles without payment plan
		no refund, if unsuccessful	Assisted Hatching included, if required	Assisted Hatching included, if required
		up to 50% refund, if unsuccessful	no refund, if unsuccessful	up to 100% refund, if unsuccessful
$13K	**$22K**	**$24K**	**$28K**	**$31K**
SELECT	SELECT	SELECT	SELECT	SELECT
Monthly financing starting at $XXX per month available through our partners*	Monthly financing starting at $XXX per month available through our partners*	Monthly financing starting at $XXX per month available through our partners*	Monthly financing starting at $XXX per month available through our partners*	Monthly financing starting at $XXX per month available through our partners*
ADDITIONAL DETAILS >	ADDITIONAL DETAILS >	ADDITIONAL DETAILS >	ADDITIONAL DETAILS >	ADDITIONAL DETAILS >

* Financial assistance is available through our partners, CAPEXMD and LENDING CLUB. Estimate based on 36 month repayment period and XX% APR. Final approval is required by the vendor.

UI Behavior

ID	Element	Description
1	Uncompleted Treatment Protocol Activity	Displays time or time of day, activity name, dose, and dose frequency. Checkbox is enabled only for activities on the current day (i.e., today). Clicking/tapping on the checkbox marks the activity as completed (see below). Clicking/tapping anywhere else opens the details modal. Supports a hover state. Checkbox state is saved across future logins. *See "1.4.4. Details Modals" on page 65 for more details.*
2	Completed Activity	Completed activity is checked and greyed out. Checkbox is enabled only for activities on the current day (i.e., today). Clicking/tapping on the checkbox marks the activity as uncompleted (*see above*). Clicking/tapping anywhere else opens the details modal. Supports a hover state. *See "1.4.4. Details Modals" on page 65 for more details.*
4	Today's Progress	Displays the number of today's completed treatment protocol activity out of today's total activity as a fraction. If there are no activities for today, this section is not displayed.
5	Future Activity	Activity on any other day than today displays the same information, however the checkbox is disabled. Clicking/tapping anywhere on the activity opens the details modal. Supports a hover state. *See "1.4.4. Details Modals" on page 65 for more details.*
6	Trigger Shot	For trigger shots, the exact time is displayed instead of the time

The Delivery Phase

Because of the platform's complexity and breadth, my team delivered a combination of annotated wireframes, design comps, business logic spreadsheets and clickable prototypes of key interactions to guide the development team.

Style Guide
A guide to the product's visual structure and style, including design patterns defined for developers

Detailed Wireframes
Design document detailing functional behavior and interactions to guide feature implementation

Interactive Prototypes
Basic working models of selective application interfaces built to clarify expected behavior

Functional Specifications
A spreadsheet based on the wireframes that captures underlying business rules and assumptions behind the design

Data Dictionary
A spreadsheet that defines all data fields in the product, mapping each one to an underlying source

Detailed Design Comps
Pixel-perfect representations of application screens used by developers as assets for implementation

User Acceptance Testing
Support in planning and performing feature acceptance tests prior to a product release

Training Materials
Documents to support the introduction of new tools and workflows throughout Integramed's fertility practice network

Leading the fertility industry with a full-service solution to benefit both patients and providers

For IntegraMed, we provided a personalized digital support system for new parents and brought capabilities in line with current clinical, technical and societal advances, all while planning ahead for the network's future scalability and growth.

Connecting Networks

21 practices sharing a next-gen platform via a single interface

Empowering Users

63K+ patients managing their journeys via a responsive web app

Implementing Financial Assistance

30% more families aided by programs we helped set in place

GM Maven

Carsharing Mobility App & Service Enhancements

tonyowens@uxarchitect.net | www.tonyowens.net | linkedin.com/in/tonyo | 347.332.3030

In its first 2 years, General Motors had successfully expanded its Maven carsharing and gig rental services from a pilot at the University of Michigan in Ann Arbor to cities across North America.

With all eyes on mobility in 2018, GM's Maven internal startup group engaged my team to elevate their mobile app experience by addressing friction points and envisioning feature enhancements to reinforce Maven's brand promise of seamless mobility services.

PROJECT GOAL

Elevate GM Maven's mobile experience to increase customer satisfaction and advance its brand vision of seamless mobility services.

MY ROLE

Project Planning

- Planned UX research and service design approach in collaboration with client and account teams

Discovery & Concept Exploration

- Led service design research expedition to Maven locations
- Traveled to Detroit weekly to co-create solutions with GM team
- Facilitated UX research, collaborative design and concept validation activities to advance the product vision
- Collaborated with team in analyzing research, defining a plan, developing a roadmap and creating conceptual prototypes

Detailed Design & Delivery

- Planned detailed design and concept testing approach
- Led Agile design sprints while collaborating with the team to address design feedback
- Worked with GM Engineers to implement 'quick win' items

COLLABORATORS

Creative Director + Team (3)

User Experience Team (4)

Technology Director

Engagement Director

Project Manager

Executive Stakeholders

Subject Matter Experts (20+)

Maven Marketing Team

Maven Product Managers

Maven Engineering Team

The Challenge

Paving the Future of Mobility Access

During its pilot program, Maven launched a minimally viable version of the Maven mobile app to support its Car Sharing model (think Zipcar, car2go).

Over time, new features were layered upon this basic app foundation, including a distinct feature set offering weekly rentals to Gig economy workers such as Uber, Lyft or Grubhub drivers.

After establishing and scaling these mobility services nationally, Maven engaged my team to enhance the customer experience in order to increase satisfaction, reduce negative app reviews and ensure that customers felt guided at each step of their journey.

In two months time, Maven needed to have a batch of approved, ready-to-build designs, in addition to an approved strategic roadmap to guide their product development plans for the next three to five years.

Our Vision

To overcome these challenges, we aligned the project around two main areas of focus.

Service Optimization: Car Sharing & Gig Rental

Conduct research to map how Maven currently operates to support the customer journey, identifying issues and opportunities for improvement.

Translate research into a prioritized product roadmap, outlining a potential release schedule for new app capabilities in the future.

Explore, validate and refine key conceptual ideas for mobile app enhancements in order to gain organizational buy-in.

Design Enhancements: Enrollment & Help/Support

Address confusion between Car Sharing and Gig during enrollment, and improve the experience at known points of friction and dropoff.

Create a vision for a more contextual, integrated help and customer support experience throughout the app.

Collaborate with Maven's engineers to ensure that design solutions for these specific areas are fully detailed and development-ready.

Our Approach

To achieve the goal of improving Maven's mobility app by reducing current friction points and imagining enhanced capabilities, I aligned our team around a service design approach comprised of three major phases of work.

5 WEEKS .... 3 WEEKS ....

Discovery ➜

Stakeholder Workshops

Pickup Location Visits

Vehicle Rental Experience

Analytics & Social Sentiment

App Review Analysis

Expert Advisors

Heuristic Evaluation

Service Evaluation

Journey Maps

Service Blueprints

Market Trend Research

Summary of Findings

Definition ➜

Ideation Workshops

Collaborative Sketching

Requirements Gathering

Feature Prioritization

Enrollment Process Flows

Creative Mood Boards

UX/UI Concept Exploration

Conceptual Prototype

Maturity Model

Product Roadmap

Delivery ➜

Style Guide

Concept Usability Testing

Detailed Wireframes

Interactive Prototypes

Detailed Design Comps

User Acceptance Testing

Product Backlog Management

Development Support

* Key activity highlighted in portfolio

Design Documentation Hub

We used Sketch and Invision to create a project 'Design Hub' – an online resource that we updated regularly with our latest research and design output, so that the Maven team could follow and engage in our process in real-time.

The Discovery Phase

Our discovery process included primary research, direct observation, knowledge transfer and information collection through several means.

Stakeholder Workshops
Collaborative working sessions with key Maven stakeholders, capturing the goals and insights they shared

Location Visits
Rented a vehicle through the app and visited a Gig Station to experience the services and discover pain points
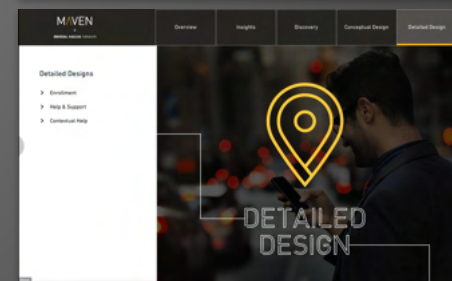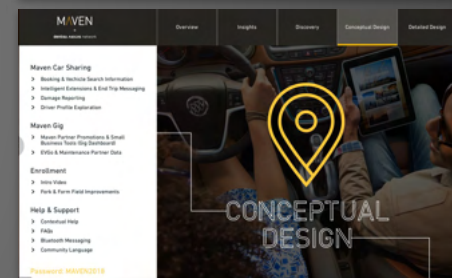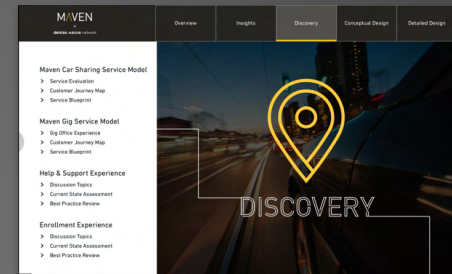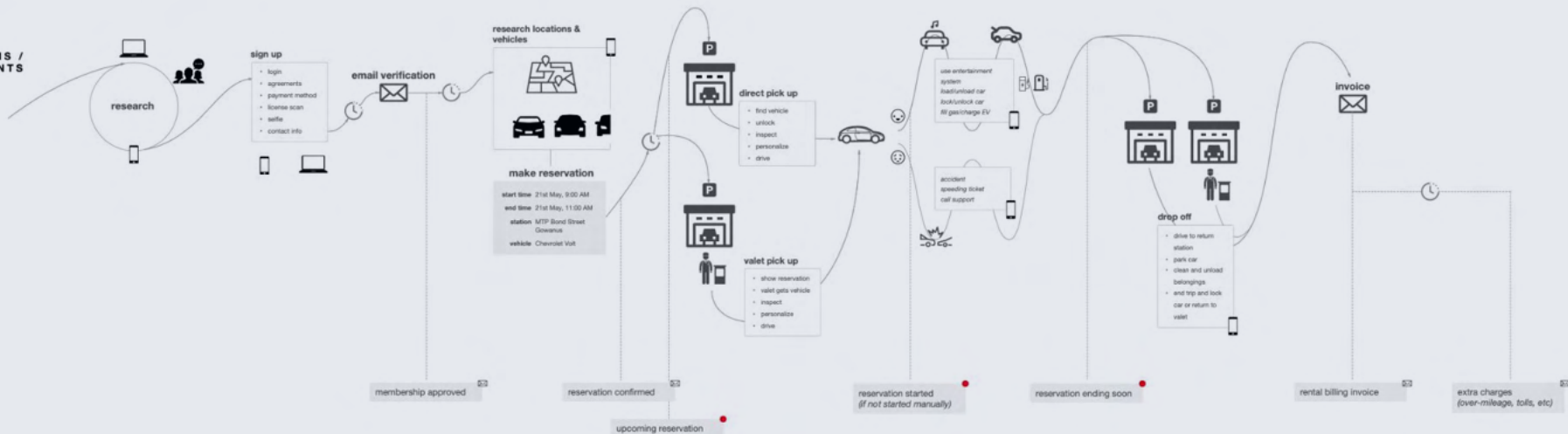
Expert Advisors
Interviews with subject matter experts to explain key areas of the business and participate in collaborative workshops

Documentation Review
Review of client-provided documents such as customer research, operational guides, service metrics and other data

Journey Maps
A story-driven graph of a typical person's (or persona's) experience, interactions and critical moments with a product or service

Service Blueprints
A graph describing key service delivery elements – people, processes, systems, artifacts – that enable a customer's journey

Heuristic Evaluation
Analysis of the app and web experiences with respect to common usability standards and best practices

Secondary Research
Analysis of company news, app reviews, social media engagement, consumer trends and competitors in depth

Research Summary

Interview Guides & Research Capture

Discovery Interview Guides

Research Capture & Analysis

Left panel:

MAVEN
+ dentsu AEGIS network

Overview | Insights | Discovery | Conceptual Design | Detailed Design
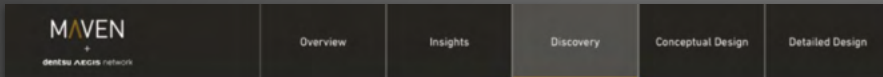
Current State Assessment

About the Current State

In the current state, American users may enroll in Car Sharing in the app or online, whereas Gig users must sign up in the app. The enrollment process is fairly similar between Car Sharing and Gig users, with larger differences called out below.

Starting Enrollment

- Landing screen only references Car Sharing, not Gig
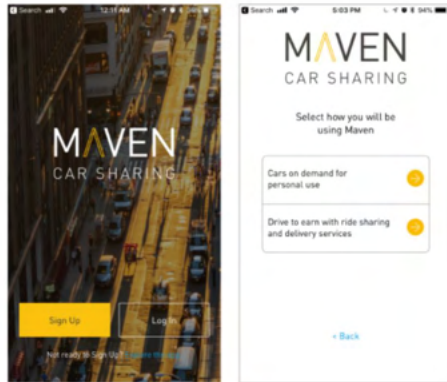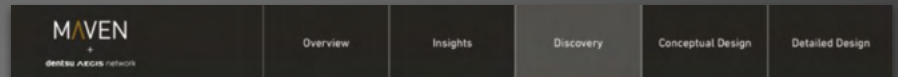- Option to view the app in guest mode
- Presented with a Car Sharing/Gig fork at the start of the enrollment process

Initial Value Proposition

- Carousel outlines the high-level value proposition of Maven Car Sharing or Gig

Right panel:

MAVEN
+ dentsu AEGIS network

Overview | Insights | Discovery | Conceptual Design | Detailed Design

Taking License Photo (Car Sharing Only)

- In the app, the user must submit photos of the front and back of their driver's license and a selfie to verify identity
- On the web the user must manually type in their driver's license number, country (and state in the US) of issuance, and expiration date
- Gig users are not shown this step and instead enter their driver's license information later after the Mailing Address step
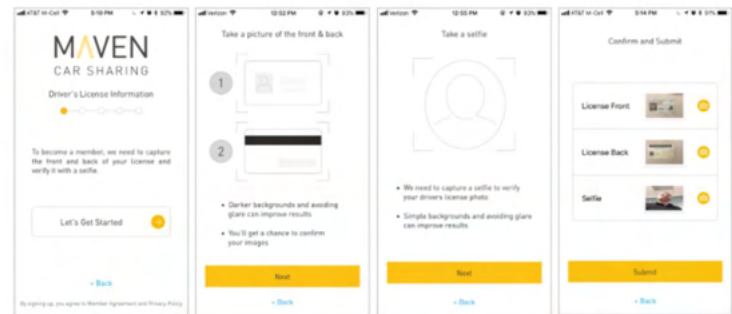
Entering Personal Info

- Personal information, mailing address and payment method are required to create an account

61

Left panel:

Best Practice Review

About the Best Practices

In looking at competitors in the mobility space, as well as other services known to offer a positive sign up experience, we have highlighted a few UX best practices that Maven can consider when designing its enrollment process.

Progressive Disclosure / Natural Language Input

- By revealing fields one at a time the user is able to better focus on the task at hand
- The use of natural language causes the fields to be read in a more conversational tone and allows for the brand to shine through

Social Sign Up

- Allowing the user to create an account with their social media login allows some fields to be pre-populated and lessens the friction of creating a new account
- Users may be reluctant to create another new account with credentials they will have to remember

Right panel:
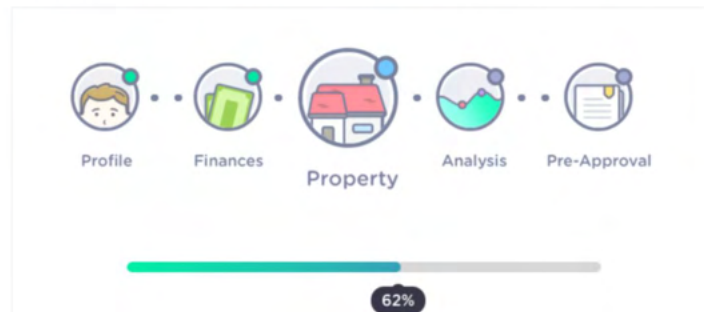
Real-time, Inline Error Validation

- Real-time, inline error validation notifies the user when a field is filled incorrectly as it happens, rather than having the user submit the page and then find the field that needs to be fixed
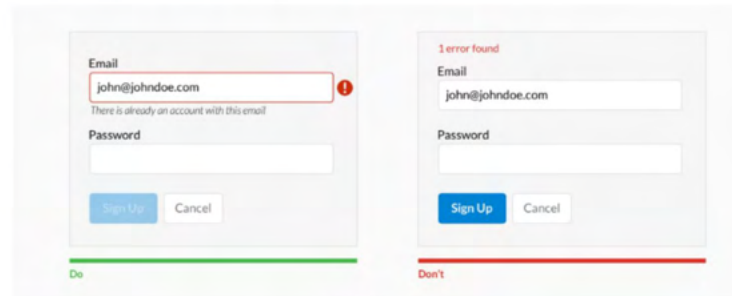
UX Collective

Indication of Progress

- Letting the user know how long the enrollment process is and how far they are through it makes it more likely that they will finish the process and keeps them from feeling discouraged

Service Design Research

Service Evaluation

Customer Journey Maps

Service Blueprints

MAVEN
+
dentsu ÆGIS network

| Overview | Insights | Discovery | Conceptual Design | Detailed Design |

MAVEN CAR SHARING SERVICE BLUEPRINT V1.5

STAGES	KEY ACTIONS & EVENTS	TOUCHPOINTS	PLACES & PROPS	FRONT STAGE	BACKSTAGE	SYSTEMS	OBSERVATIONS

CONSIDERING OPTIONS

research service to address questions based on needs: web search, ask friends, compare services, find app on app store

- mobile, web, in-person
- research mobility services
- research maven service

- event location
- physical signage
- marketing & promotion emails

maven agents — answer queries about service features, car features, costs, location availability, etc.

experiential team — in-person marketing

social media team — forum and social media outreach

marketing team — ad campaigns

product quality — support experience

- *tableau* — data analysis and visualization
- *appsflyer* — app usage analytics
- *siebel (CRM)* — capture emails
- *crimson hexagon* — social media messaging

ENROLLMENT

sign up on website/app

email verification

- mobile, web, in-person
- service signup approval

- email confirmation email
- member welcome email
- post welcome educational email (nyc)

maven agents — help with signup process and answer questions about service

experiential team — assisted signup process

member services — manual check of flagged licenses

product quality — support experience

- *redshield (p/o planet payment)* — identity verification & fraud protection
- *authenticID* — identity verification
- *GVN* — driving license verification
- *planet payment* — payment verification

- very little self help
- email-only notifications/ messaging could be reducing engagement
- imperfect license scanning can result in false rejections necessitating manual checks

VEHICLE RESEARCH / BOOKING

research location/ vehicles

choose location, time and vehicle based on needs

make reservation

- mobile
- find vehicle per needs
- make reservation

- reservation confirmation email
- upcoming reservation alert email
- 1st time valet reservation email
- upcoming reservation notification

maven agents — help using app & making reservations

member services — support reservation process

field ops team — updates vehicle availability based on cleaning, maintenance schedule, etc

product quality — support experience

- *admin tool* — manage customer data
- *siebel* — CRM case management
- *reservation system* — update reservation status

- lack of case mgmt system
- member services not prepared to deal with questions about UI issues
- if preauth CC charge fails, their reservation is canceled, and now the car is not available

VEHICLE PICKUP

find and travel to station

access garage

find vehicle

inspect

- mobile, signage
- find vehicle station pickup vehicle

- parking garage & station
- station signage
- valet (nyc) notification about upcoming reservation
- EV handout
- maven manual in vehicle

maven agents — help finding station, accessing vehicle, vehicle cleanliness & damage reports

parking garage attendant — help access garage find maven station

member services — remote vehicle access

valet (nyc) —

product quality — support experience

- *admin tool* — access customer data, remote vehicle access
- *elimiwait* — notifies valet of upcoming

- no unified case history mgmt system - email and comms are separate and car history is separate app
- not clear that car availability is tied to status (found now, but not made clear)
- problems finding stations
- bluetooth doesn't work properly, especially on older version of Android

---

(Left side: earlier version — Service Mapping: Car Sharing with Customer Journey Stages across Stage 1 Considering Options, Stage 2 Enrollment, Stage 3 Vehicle Research/Booking, Stage 4 Vehicle Pickup; rows for Customer Actions/Events (Ideal Path), Customer Actions/Events (Issues & Alternative Paths), Motivations, Thinking, Feeling, Customer Pain Points, and Service Model rows: Customer Touch Points, Places & Props, Front Stage Actors/Actions, Back Stage Actors/Actions, Systems)

Summary of Research Observations

Billing & Payment

Issues with billing procedures, payment difficulties, invoice presentation and other payment-related communications.

Booking & Reservation

Issues around booking flows and filters, managing reservations, extensions and waitlisting.

Brand Engagement & Brand Experience

Situations lacking emotional engagement with the brand or channels for more engaging interaction.

Case Management

Disconnected information silos, ambiguous or redundant information and difficulties with logging, tracking and solving customer issues.

Community & Accountability

Lack of a greater sense of community and accountability to each other, and moments which could allow for communication and engagement with each other.

Customer Help & Support

Lack of user guidance and help throughout the experience, from process explanations to on-demand help.

Enrollment

Friction during the enrollment flow, insufficient supporting information, and inadequate failure recovery.

Fleet Management & Maintenance

Adding, removing, cleaning and maintaining the vehicles in the field, and setting up car pickup locations.

Fraud Prevention

Fraud prevention and checking measures and their impact on the customer.

Gig Efficiency Tools

Lack of specific value-add tools designed especially for use by

Personalization & Configuration

Situations that offer the potential to personalize the service or help

Pricing & Availability Information

Issues related to the display and filtering of vehicle availability
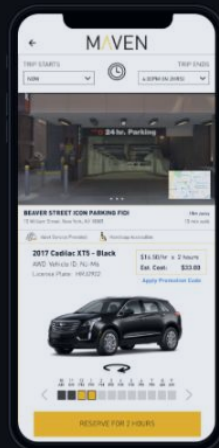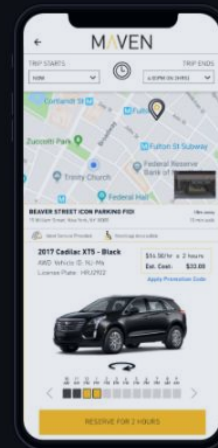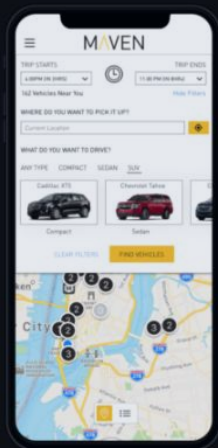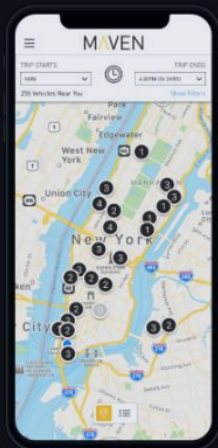
The Definition Phase

Now equipped with substantial findings and insights from Discovery, we partnered with the Maven team to explore creative opportunities and determine a roadmap towards attaining its strategic product vision.

Ideation Workshops

Brainstorming sessions with Maven to prioritize strategic goals and explore creative solutions

Creative Mood Boards

Design explorations intended to explore high-level look, feel and style prior to actual screen design

UX/UI Concept Exploration

High-level design of key screens to establish consensus on the overal vision and direction for new product features

Conceptual Prototypes

Interactive models of key screens and journeys built to share and validate with UX concept testing participants

User Stories & Requirements

User-centered descriptions of key tasks and needs, used as acceptance criteria for design and testing

Maturity Model

A high-level strategic framework that outlines key stages in Maven's journey toward realizing its full product vision

Product Roadmap

A guiding document that translates prioritized strategic opportunity into a viable multi-phased project plan

Opportunity Prioritization

We first aligned around a Strategic North Star: to position Maven as the future of mobility.

We then led a collaborative exercise with Maven stakeholders to score, rank and plot each of the identified design opportunity areas on two dimensions: business/customer value and organizational readiness.

This scoring exercise resulted in an 'Opportunity Matrix' with four quadrants that began to suggest a prioritization for the strategic areas that we had discussed.

Prioritized Opportunity Matrix*

* Isobar's prioritization

1st Engagement Areas Of Focus   ■ Detailed Design   ■ Conceptual Design

High

CONSIDER   **ACT**

- Customer Help & Support
- Prospect Education, Marketing & Referrals
- Booking & Reservation Flow
- Enrollment (Fork)
- Reinforcing Service Expectations
- Pricing & Availability Information
- Vehicle Condition & Self-Reporting
- Vehicle & Location Information
- Service Flexibility & Control
- Billing & Payment
- Fraud Prevention
- Brand Engagement & Brand Experience
- Gig Efficiency Tools
- Proactive & Responsive Communication
- Personalization & Configuration
- Service Failure & Fallback

DEFER   **PLAN**

- Training & Process Reinforcement
- Community & Accountability
- Fleet Management & Maintenance
- Case Management

Organizational Readiness

Low ← → High

Business / Customer Value

Maturity Model & Roadmap Planning

Working from this prioritization, we envisioned the Product Roadmap as three discrete phases, each advancing the overall program and moving Maven closer to its Strategic North Star.

3 — **LEAD THE MARKET**
Fully realize Maven's unique brand promise through digital channels; deliver internal tools that reinforce key processes while increasing efficiency and customer satisfaction.

2 — **ENHANCE & EXTEND**
Elevate Maven's mobile app & web experiences to delight customers, transcend expectations and set new standards in the delivery of seamless mobility solutions & services.

1 — **STREAMLINE & OPTIMIZE**
Improve branding, positioning and communication of Maven services; address major customer pain points, engagement barriers & service delivery challenges.

Maven Product Roadmap

The key to a successful Product Roadmap is to balance organizational readiness, technical complexity & deep customer engagement in order to deliver incremental value throughout the product design & development timeline.

1st Engagement Areas Of Focus   ▮ Detailed Design   ▮ Conceptual Design

| PHASE 1	PHASE 2	PHASE 3
Streamline & Optimize *Q3 2018 – Q4 2018*	**Enhance & Extend** *2019*	**Lead The Market** *2020*
Improve branding, positioning & communication of Maven services; address major customer pain points, engagement barriers & service delivery challenges.	Elevate Maven's mobile app & web experiences to delight users, transcend expectations & set new standards in the delivery of seamless mobility solutions & services.	Fully realize Maven's unique brand promise through digital channels; deliver internal tools that reinforce key processes while increasing efficiency & customer satisfaction.
Marketing: Improve Maven website architecture, style & branding; optimize presentation of Maven product/service portfolio; improve Gig referral tactics.	**Driver Score & Gamification:** Establish driver score metrics to promote loyalty & accountability; incorporate gamification elements into experience.	**Brand Engagement/Experience**: Consider features/experiences to build emotional connections with Maven's *#BeThere* brand proposition (e.g. auto-generated, shareable trip journals using mobile GPS/photos, etc.).
Enrollment: Improve product fork; provide better guidance/expectations; optimize forms & flow; improve license capture solution.	**Fraud Prevention:** Integrate machine learning + other advanced fraud prevention measures into service.	**Personalization/Configuration**: Offer saved settings/features to build loyalty among repeat customers (e.g. fast Wi-Fi setup, saved radio stations, mirrors/seats, etc.).
Vehicle Search/Booking: Clarify vehicle availability timeframe/filters; improve vehicle/location information; align My Trips with Search/Booking updates.	**Enrollment:** Enhance flow with conversational UI and progressive disclosure elements; incorporate logic for escalated fraud prevention based on risk score.	**Case Management**: Create a custom, integrated internal case management system incorporating
	Billing & Payment: Assess	

Concept Design & Planning

Now aligned on the project priorities, we kicked off Conceptual Design with two days of collaborative brainstorming, requirements planning and sketching with the Maven team.

We led Maven senior stakeholders in concepting innovative solutions to challenges like booking, damage reporting, trip extensions and more.

After discussing and refining these ideas together, my team then polished and prototyped each of these ideas, noting open design questions as candidates for testing.
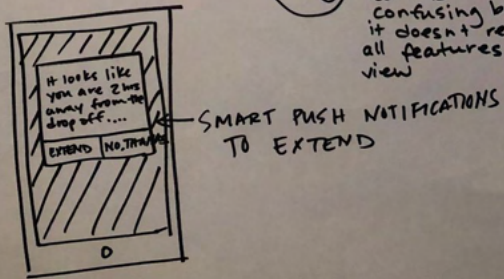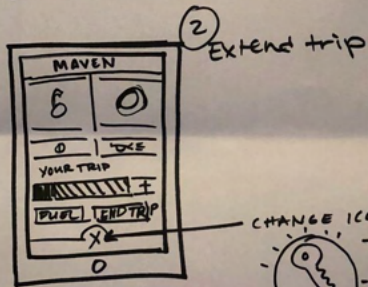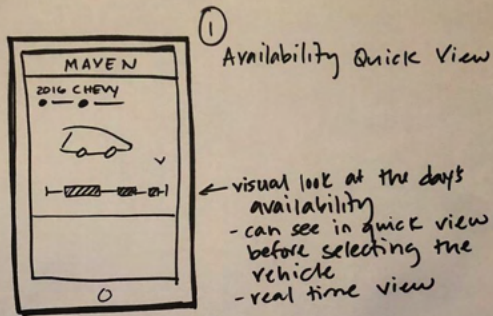
Enrollment #1
Near-Term: Fork & Better Context / Expectations: Form Field Improvements

- Near-term
- Fork
- Better context / expectations
- Form field improvement
- Error validation
- In-app introduction (carousel)
- Testable
- Key, targeted screens
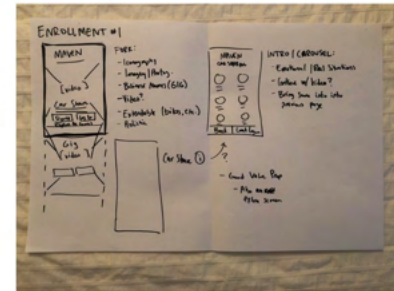
Gig #1
Building Awareness of Maven Partners in Market

- Near-term
- Inventory far term opportunities
- Not a test candidate
- List of local partners (market-based)
- Featured partners
- How to access / present and message
- Admin side description
- Referral codes
- Overview and details
- Starts from main screen? My reservations? Enrollment? Menu? Notifications
- Capture who they already drive for
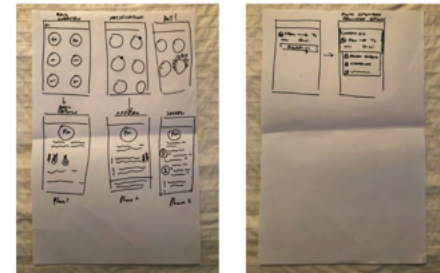
72

EVgo and Maintenance Partners

Process

Map Current Experience → Create Observations → Identify Opportunities → Create Conceptual Vision

The Challenge

- Provide a way for Gig drivers to find and contact approved maintenance partners
- Provide a way for Gig drivers driving EV vehicles to find EVgo network charging stations
- Educate Gig drivers on how to work with maintenance partners and use EV charging stations

Observations

- Maven approved maintenance partners offer a variety of services
- There are several rules around using maintenance partners that Gig drivers are sometimes not aware of
- Most Gig drivers are unaware about how EV charging works
- Rules of etiquette have developed around the usage of shared EV charging stations that new EV drivers may be unaware of
- Since EV charging can often take a few hours, charging station availability is an important criteria for deciding when and where to charge
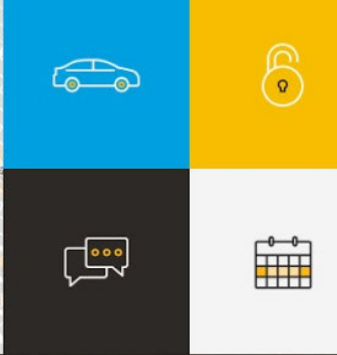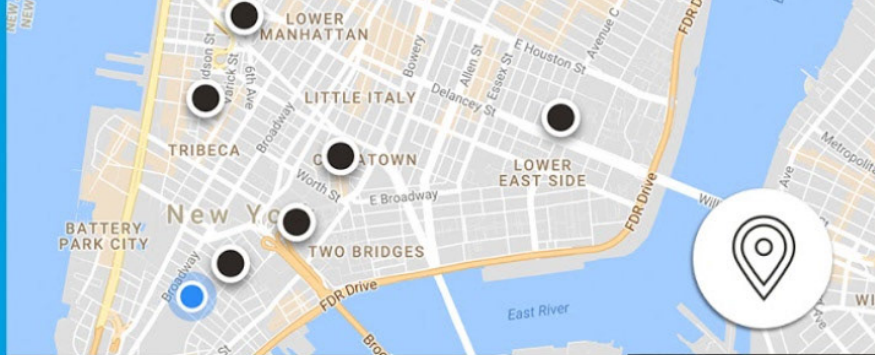
Opportunities / Goals

- Display Maven approved maintenance partners and EV charging stations on a map
- Display services that maintenance partners offer and contact details
- Educate Gig drivers on how to use maintenance partners
- Display available and in-use chargers at each charging station and their usage over the day
- Educate Gig drivers on how to charge the vehicle and etiquette around charging

Key Improvements

- Utilize familiar overview-detail structure for both maintenance partner and EVgo stations
- Display most important help information for using maintenance partners
- Allow for filtering based on service types offered by maintenance partners
- Display different types of chargers available and educate on their differences
- Display tips on the nuances of the EV charging process and etiquette
- Display charger usage distribution through the day/days
- Display help on how to charge the vehicle
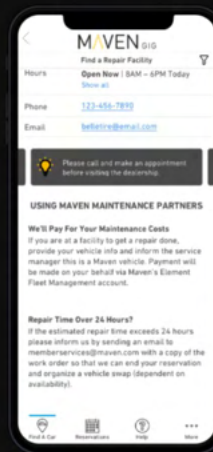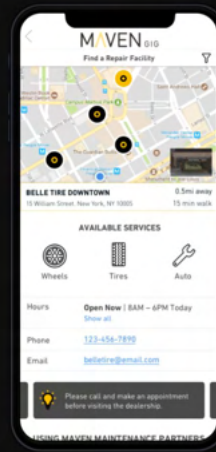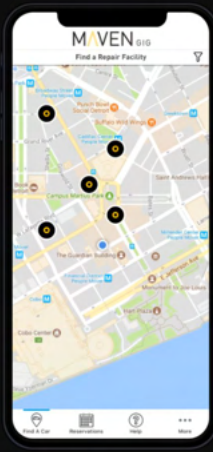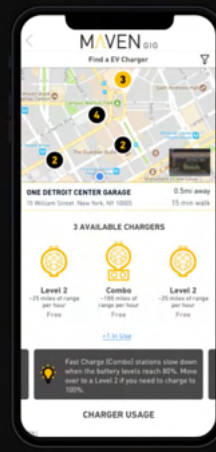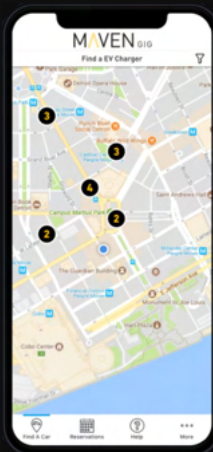
Intelligent Trip Extensions & End Trip Messaging

Process

Map Current Experience → Create Observations → Identify Opportunities → Create Conceptual Vision

The Challenge

- Increase the awareness and reduce the confusion around trip extensions

Observations

- The current experience is clunky and unstable, producing errors and confusing messaging
- The In-Trip screen provides less than a complete picture of the user's reservation

Opportunities / Goals

- Redesign the In-Trip experience focusing on:
  - Trip metadata
  - Car information & actions
- Add a clear path to extend the reservation

Key Improvements

- Increased usefulness by adding valuable at-a-glance information
- Provided a way to get ahead of the "too far to return the vehicle on time" problem
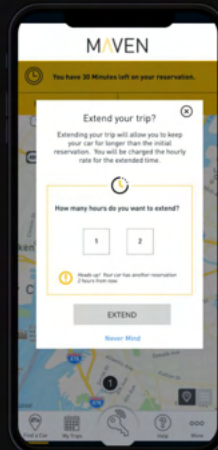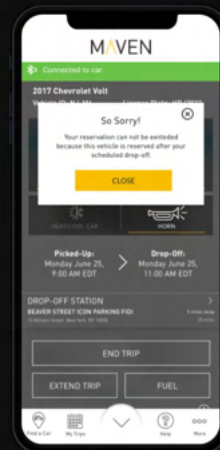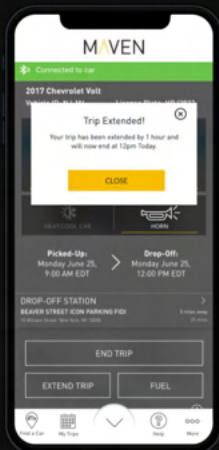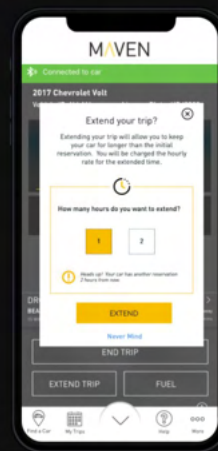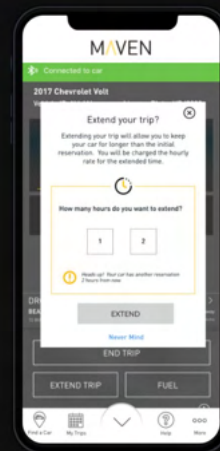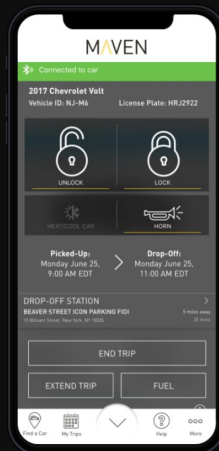
Reservation Flow Concept
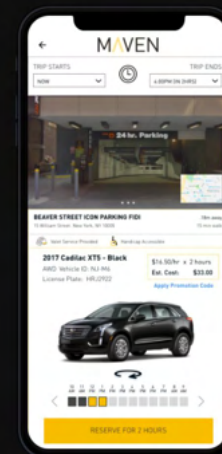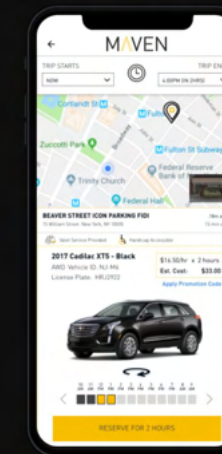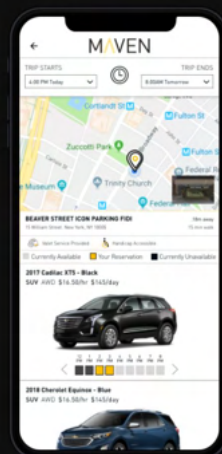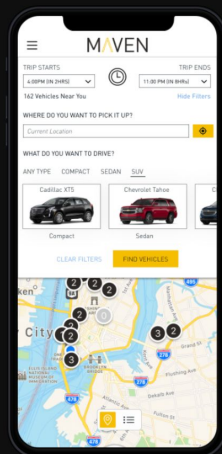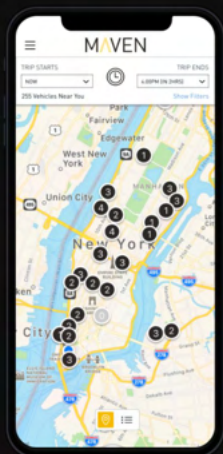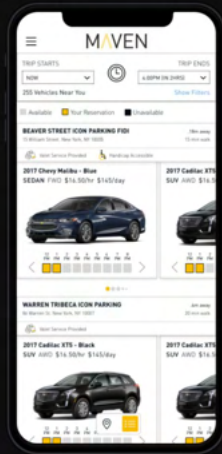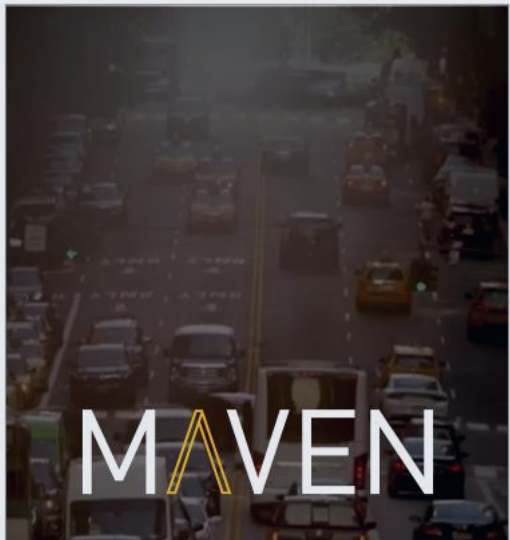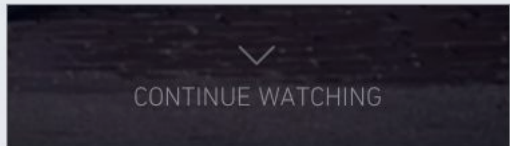
INTRO VIDEO
When the app first loads the video starts and plays through the end or until the user swipes up or interacts with the Get Started CTA. The video loops around and plays again after it ends.

GET STARTED CTA
Tapping the CTA or swiping up anywhere on this screen reveals the Car Sharing and Maven Gig fork.

CAR SHARING
Section containing brief value propositions around Car Sharing with buttons to navigate to the Car Sharing Landing, Sign Up, and Login screens.

CARS NEAR ME BUTTON
Tapping this button takes the user to the Car Sharing Landing screen where they can learn more about the service and use the map to explore availability.

The Delivery Phase

To guide Maven's software engineering team, we delivered a combination of annotated wireframes and design comps as well as clickable prototypes for key interactions.

Style Guide
A guide to the product's visual structure and style, including design patterns defined for developers

Detailed Wireframes
Design document detailing functional behavior and screen interactions to guide implementation

Interactive Prototypes
Basic working models of selective application interfaces built to clarify expected behavior

UX Concept Testing
Moderated "thinkaloud" testing of prototypes to gain feedback for future design iterations

Detailed Design Comps
Pixel-perfect representations of application screens used for implementation

User Acceptance Testing
Support in planning and performing feature acceptance tests prior to a product release

Slide 1

Concept Testing Overview

Summary

- Participants' age ranged from early 20s to late 50s
- Each testing session ranged from 35 minutes to 1 hour
- Each participant went through each of the 3 concepts
- Think aloud method was used with probing questions as necessary
- In addition to the participant, there was a testing guide and a note-taker
- All sessions were video-recorded (incl. screen recording) using Silverback
- Concepts took the form of InVision prototypes (in fullscreen browser windows)

Fork Screen Findings

1. "Car Sharing" and "Ride Sharing" terms

Although they are industry-standard terms, the average consumer has trouble understanding what each term means and what the difference between the two without detailed descriptions or examples.

2. "Drive to Earn" label caused confusion

While the label "Drive to Earn" makes sense once the user understands the Gig service, many users first incorrectly assumed it meant that they could earn points or rewards for using Maven.

3. "Mobility Service" term was unfamiliar

"Mobility service" is common within the industry but can be misunderstood by users. Various users thought mobility referred to either mobile phones or accessibility for people with a disability.
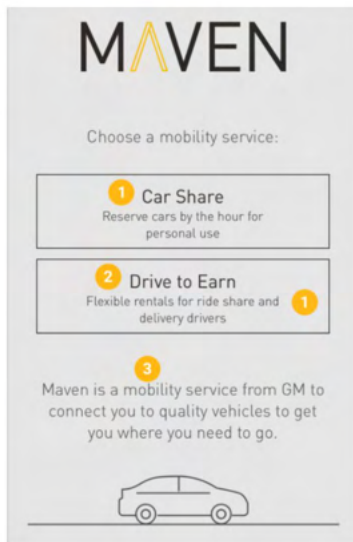
4. Believe that they can get a car immediately

Whether it was from implications in the app or prior experiences with other services, users had

MAVEN

Choose a mobility service:

1 Car Share
Reserve cars by the hour for personal use

2 Drive to Earn   **1**
Flexible rentals for ride share and delivery drivers

3
Maven is a mobility service from GM to connect you to quality vehicles to get you where you need to go.

Slide 2

Enrollment Flow & Contextual Help Findings

1. License Photo Instructions are Unclear

Users were generally comfortable with capturing their driver's license, they just wanted more explicit instructions as to when and how they will be taking the photos.

Before you get on the road, we need to verify your driver's license with a few quick photos.

- Improve results by using darker backgrounds and avoiding glare
- You'll get a chance to confirm your images

2. Surprise & Concern with the Selfie Step

Users were surprised when the app asked them to take a photo of themselves, but were generally fine with the idea once they realized it was to protect them from fraud.

Next we need to verify that your face matches the face on your license.

- This photo will not be used anywhere in your profile, so it doesn't need to be perfect
- Simple backgrounds and avoiding glare can improve results

3. Confusion about Local Market/Destination

Users faced some confusion around language referring to the "market" they would be using Maven, where they will be picking up the car and where they will be driving it.

Where do you want to drive? **3**

Country

🇺🇸 United States ▼

Zip Code

4. Contextual Help Helped, not for Everyone

While contextual help was useful in assuaging a particular concern, it was not clear that it could be a portal to further, more general questions.

Before you get on the road, we need to verify your driver's license with a few quick photos.

Car Sharing Landing (US Map)

< MAVEN   ENROLLMENT

Location Permission

9:41 AM   100%

MAVEN
CAR SHARING

Find a vehicle in your area.
Starting at $8/hr.

Allow "Maven" to access your location while you are using the app?

We'd like to access your location so we can display available vehicles near you. This helps us to provide you with the best service possible. Sound good?

Don't Allow   Allow

SIGN UP

LOG IN

Car Sharing Landing (US Map)

9:41 AM   100%

MAVEN
CAR SHARING

Find a vehicle in your area.
Starting at $8/hr.

Where You'd Like to Use Maven

Choose a City

United States

Mexico

Gulf of Mexico

Be There with Maven

Your Phone is the Key to Everything

Reserve Cars Starting as Low as $8/hr

Gas is Included

No Annual Fees

ANNOTATIONS

DESCRIPTION
The user has arrived at this screen by selecting "Car Sharing" from the previous landing page.

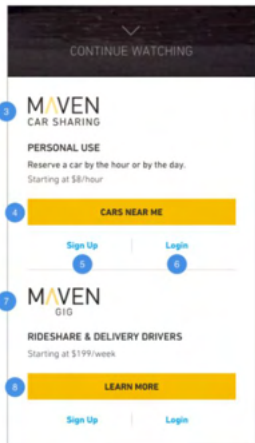1   PERMISSION REQUEST OVERLAY
Upon entering the app and seeing a map for the first time, the user is prompted to allow the app to use their location so that it can display vehicles near the user. If the user does not allow permission they must manually go into their settings to allow it. Not allowing location services also makes the map on the landing screen stay at the country level and will not zoom into the user's city (if in market) automatically.

2   BACK BUTTON
Navigates the user back to the app landing screen to choose a service.

3   MARKET SELECTOR DROPDOWN
A dropdown menu with a complete list of cities supporting Car Sharing and an option if the desired city is not listed.

4   FIND CURRENT LOCATION
Zooms the map into the user's current location and updates the Market Selector Dropdown to their current city if they are in a city that supports Car Sharing. If the user is not in a city with Car Sharing the map stays at this level, a message is displayed (see below), and the Market Selector Dropdown updates to "City not listed."

5   COUNTRY MAP
The country map is displayed if the user does not allow location services or if the user is in a city that does not support Car Sharing.

6   CAR SHARING FEATURES
High level overview of Car Sharing's main enticing features presented in a carousel. The user may swipe left or right through the carousel to paginate. The carousel loops around if the user swipes from the end forward to the start and vice versa.

7   CAR SHARING FEATURE CAROUSEL MARKERS
Displays which page of the carousel is currently being shown.

8   ENROLLMENT FOOTER
Footer is fixed to the bottom of this screen and contains Sign Up and Log In buttons.

9   SIGN UP BUTTON
Navigates the user to the Sign Up flow for Car Sharing.

10 LOG IN BUTTON
Navigates the user to the Log In flow for Car Sharing.

11 CITY NOT LISTED DISCLAIMER
If the user chooses "City not listed" from the Market Selector Dropdown or if their current location is in an area not supported

Car Sharing Landing (Local Map)

< MAVEN   ENROLLMENT

Car Sharing Landing (Local Map)

9:41 AM   100%

MAVEN
CAR SHARING

Find a vehicle in your area.
Starting at $8/hr.

Where You'd Like to Use Maven

New York City

There are 255 available vehicles within 1 mile

CHELSEA
GREENWICH
EAST VILLAGE
LOWER MANHATTAN
TRIBECA
LOWER EAST SIDE
WORLD TRADE CENTER
VINEGAR HILLS
WILLIAMSB

Be There with Maven

Your Phone is the Key to Everything

Reserve Cars Starting as Low as $8/hr

Car Sharing Landing (Local Map) - Carousel Position 2

9:41 AM   100%

MAVEN
CAR SHARING

Find a vehicle in your area.
Starting at $8/hr.

Where You'd Like to Use Maven

New York City

There are 255 available vehicles within 1 mile

CHELSEA
GREENWICH
EAST VILLAGE
LOWER MANHATTAN
TRIBECA
LOWER EAST SIDE
WORLD TRADE CENTER
VINEGAR HILLS
WILLIAMSB

Get Started

1   Sign Up
Membership is free and rates start at $8/hr.

2   Pick Up
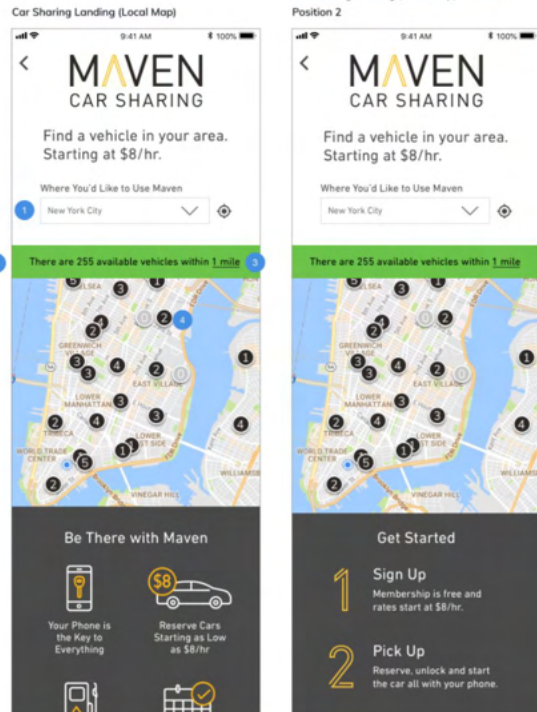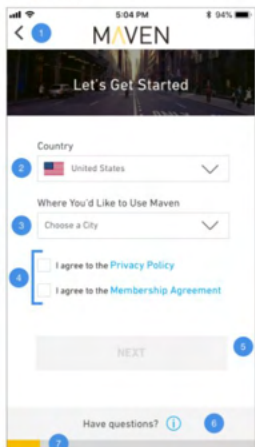Reserve, unlock and start the car all with your phone.

ANNOTATIONS

DESCRIPTION
The user has arrived at this screen by selecting "Car Sharing" from the previous landing page.

They see this state of the page if they allowed location services and are currently in a Car Sharing market, or if they have chosen a market from the Market Selector Dropdown.
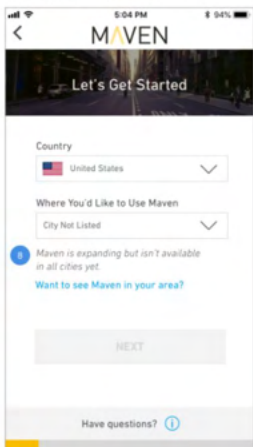
1   MARKET SELECTOR DROPDOWN (CITY SELECTED)
When the user is in a Car Sharing market and has allowed location services, the dropdown automatically updates to show the user's city.

The user may also have selected their city in the dropdown to achieve this state.

2   AVAILABLE VEHICLES BANNER
Banner displaying the number of vehicles that are currently available within a certain mile radius.

3   DISTANCE RADIUS SELECTOR
Tapping this underlined text in the banner triggers a dropdown that allows the user to choose the size of the radius for the number of available vehicles in this banner. The options include 1 mile, 3 miles, 5 miles, and 10 miles.

4   GARAGE INDICATOR
Each garage on the map is represented by a number indicating the number of vehicles currently available at that site. Tapping on one of these indicators reveals the Pickup Location View, seen in the "Car Sharing Landing (Explore Vehicles)" view below.

5   CAR SHARING FEATURE CAROUSEL (FURTHER PAGES)
Additional page of the carousel including brief instructions about the Car Sharing experience.

6   PICKUP LOCATION VIEW
After the user selects a pickup location from the map view, this section now shows details about that garage or lot and the vehicles at that location, starting with the vehicles available at the designated time.

7   BACK TO MAP BUTTON
Selecting this button navigates the user back to the map view of this module.

8   TIME RANGE SELECTORS
The user may select a start and end time for their trip. These dropdowns default to now (start time) and 2 hours from now (end time).

9   PICKUP LOCATION DETAILS
Contains the name of the pickup location, address, distance from current location (if current location is known), and any special considerations, such as valet or handicap accessibility.

10 VEHICLE LISTING
Name and photo of vehicle, relevant details, and cost per hour, day, and for the time selected.

Left Panel

MAVEN — ENROLLMENT

Getting Started and Creating an Account

Getting Started (5:04 PM)
MAVEN
Let's Get Started
Country — United States
Where You'd Like to Use Maven — Choose a City
☐ I agree to the Privacy Policy
☐ I agree to the Membership Agreement
NEXT
Have questions? ⓘ

Getting Started - City Not Listed (5:04 PM)
MAVEN
Let's Get Started
Country — United States
Where You'd Like to Use Maven — City Not Listed
Maven is expanding but isn't available in all cities yet.
Want to see Maven in your area?
NEXT
Have questions? ⓘ

Service Not Available (5:04 PM)
MAVEN GIG
Let's Get Started
Country — Canada

Request Maven in Country (5:04 PM)
MAVEN GIG
Want Maven Gig to Come to Your Country?
Country — Canada
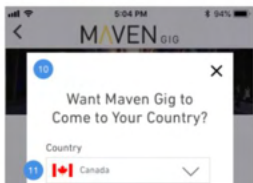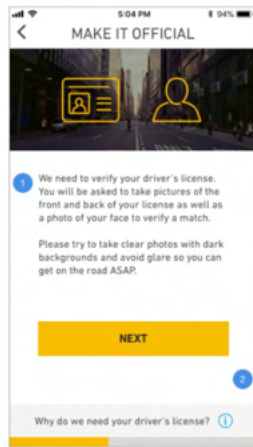
ANNOTATIONS

DESCRIPTION
The user has arrived at the Getting Started screen by selecting Sign Up from any of the landing pages.

NOTE: This document mainly details the enrollment flow for Car Sharing, as it is nearly identical to the Maven Gig flow. Any differences between Car Sharing and Maven Gig will be highlighted.
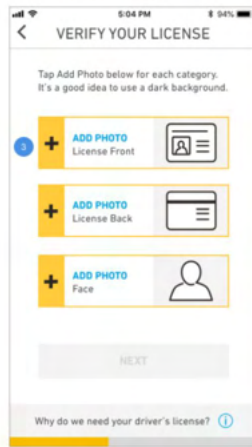
1. BACK BUTTON
Navigates the user back to the previous screen the user was on. Clears all data typed into fields.

2. COUNTRY SELECTOR
The user selects their country from the dropdown. This field will default to the user's current location if they previously allowed location services, or the country of the app store from which the user downloaded the app. If the user selects a country that does not offer the selected service, the user will receive an error message explaining that that product is not available in their country yet.

3. CITY SELECTOR DROPDOWN
The list of cities this service supports from the country selected above is contained within this dropdown. The option "City not listed" also appears in this list, triggering a message about availability.

4. AGREEMENTS
Pending approval from Legal, the user may accept each policy and agreement at this point. If they would like to read the full text of these documents they may select the linked names of the documents, which would open up a web view of that document.
If this approach to agreements is acceptable, please disregard the pages of this document titled "Membership Agreements".

5. NEXT BUTTON (DISABLED)
Takes the user to the next screen in the signup flow. Displays in a disabled state when all required fields are not completed.

6. CONTEXTUAL HELP
A button under the Next Button that, when tapped, reveals contextual help for the step the user is currently on. The label should, when possible, relate to the user's current step so it is clear that the help will be directly related to the task at hand, not just general help. The user may tap anywhere on the bar to launch Contextual Help. See the Contextual Help section for more details.

7. PROGRESS BAR
The progress bar moves forward every time the user moves on to a further page in the flow.

8. AVAILABILITY MESSAGE
A message below the dropdown explains that Maven is not available in all cities. The link opens the Request Car Sharing Overlay so the user may request Maven Gig in their city.
See "Car Sharing Landing (US Map)" for details about this overlay.

Right Panel

MAVEN — ENROLLMENT

License Verification Photos

License Verification - Explanation (5:04 PM)
MAKE IT OFFICIAL
We need to verify your driver's license. You will be asked to take pictures of the front and back of your license as well as a photo of your face to verify a match.
Please try to take clear photos with dark backgrounds and avoid glare so you can get on the road ASAP.
NEXT
Why do we need your driver's license? ⓘ

License Verification - No Photos (5:04 PM)
VERIFY YOUR LICENSE
Tap Add Photo below for each category. It's a good idea to use a dark background.
+ ADD PHOTO — License Front
+ ADD PHOTO — License Back
+ ADD PHOTO — Face
NEXT
Why do we need your driver's license? ⓘ

License Verification - Front of License

License Verification - Capture Error
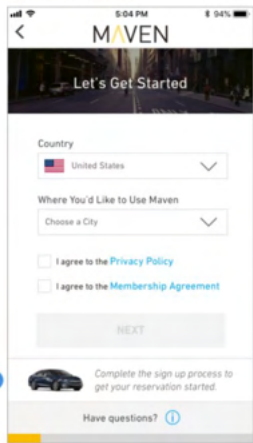Let's Try That Again
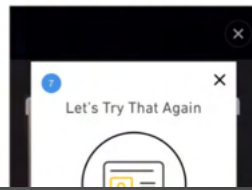
ANNOTATIONS

DESCRIPTION
The user has arrived at the License Verification screens after creating an account with an email address and password. First the verification process is explained, and then the user sees the checklist of each item they must capture.
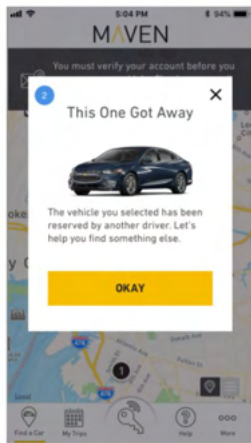
1. LICENSE VERIFICATION INSTRUCTIONS
Explanation and instructions about the license verification process. This screen has no fields or requirements and the user can immediately move to the next screen in the flow.

2. LICENSE VERIFICATION CONTEXTUAL HELP
Contextual help explains why the user must submit photos of their license and of their face with more details about Maven's privacy considerations around these photos.

3. ITEM TO BE PHOTOGRAPHED
Each item that must be photographed is a row in this table that may be tapped to launch the camera. Tapping anywhere in the empty row launches the camera.

4. CLOSE CAMERA BUTTON
Closes the camera and returns the user to the checklist screen without capturing a photo.

5. PHOTO INSTRUCTIONS
When the camera is launched, instructions on properly taking the photo are displayed as the user lines up their photo.

6. CAPTURE PHOTO BUTTON
Takes the photo currently being previewed and advances the user to the Review Photo screen if the license photo is deemed valid and clear.

7. ERROR OVERLAY
If a face is not detected in the front of licence photo or face photo an error message will explain what went wrong and how to fix it. Closing the modal overlay in any way allows the user to take another photo.

8. COMPLETED INDICATOR
When a valid photo is taken, a completed indicator appears on that item's row.

9. RETAKE PHOTO
Tapping this link reopens the camera so that the user may retake the photo. Closing out of the camera at this point maintains the previous photo taken.

10. VIEW PHOTO
Tapping on the thumbnail of the image (which appears after a photo has been taken) shows the user a full screen version of the photo so that they may verify that the photo is sufficient.

11. CAPTURING BACK OF LICENSE
Capturing the back of the license behaves the same as capturing the front.

MAVEN ENROLLMENT

Sign Up from Vehicle Selection

Sign Up Incentive Banner

5:04 PM 94%

MAVEN

Let's Get Started

Country
United States

Where You'd Like to Use Maven
Choose a City

☐ I agree to the Privacy Policy
☐ I agree to the Membership Agreement

NEXT

Complete the sign up process to get your reservation started.

Have questions? ⓘ

Vehicle Already Reserved Overlay

5:04 PM 94%

MAVEN

You must verify your account before you

② This One Got Away ✕

The vehicle you selected has been reserved by another driver. Let's help you find something else.

OKAY

Find a Car   My Trips   Help   More

ANNOTATIONS

DESCRIPTION

As an incentive to finish the enrollment process, the user sees a photo of the vehicle they selected and encouraging copy about signing up or logging in at the start of enrollment. See Car Sharing Landing (Local Map) for details.

If the vehicle is still available after the user user completes enrollment and is verified they will be taken to a screen to confirm the reservation they selected before signing up. If the vehicle is no longer available they will receive the message that someone has booked it.

① SIGN UP INCENTIVE BANNER
At the start of the enrollment process the user sees the Sign Up Incentive Banner fixed to the bottom of the screen above the Contextual Help bar. The banner contains a thumbnail image of the vehicle they selected and an explanation that the user must enroll before reserving a vehicle. The banner disappears after this screen.

② VEHICLE ALREADY RESERVED OVERLAY
If the vehicle is reserved by someone else before the user is verified the user will receive this message letting them know their vehicle is no longer available.

MAVEN ENROLLMENT | Contextual Help

Contextual Help

Default State

5:04 PM 94%
‹ VERIFY YOUR LICENSE

Tap Add Photo below for each category. It's a good idea to use a dark background.

✛ ADD PHOTO
License Front

✛ ADD PHOTO
License Back

✛ ADD PHOTO
Face

NEXT

Why do we need your driver's license? ⓘ

Contextual Help State

5:04 PM
‹ VERIFY YOUR LICENSE

Tap the camera button below for each category. It's a good idea to use a dark background.

Why we need your ID ✕

We'll need to review your driving record before you're approved to drive (we do not do background checks or credit checks). You'll receive an email about the status of your registration after this review has been completed.

✛ Can I join is I have a driver's license from outside the U.S.?

✛ I already submitted my registration, but some of the information was incorrect?

✛ Tips for scanning your license.

CALL 844-HI-MAVEN

CHAT   EMAIL

ANNOTATIONS

DESCRIPTION

The user has arrived at this state by tapping a contextual help link during the enrollment process.

① CONTEXTUAL HELP LINK
At the bottom of each step of enrollment, links such as this one indicate to the user that more information about the content of the selected page is available. Tapping this link displays the contextual help in a bottom sheet.

② CONTEXTUAL HELP
The most relevant information which directly answers the question presented by the link is displayed at the top of the bottom sheet along with a descriptive icon or graphic.

③ RELATED QUESTIONS
Up to 3 related questions are displayed. Tapping any question toggles its expanded or collapsed state, as in the Help section.

④ CHAT
Tapping this link will launch the Chat with Agent function.

⑤ CALL
Tapping this link opens the device's dialer app with Maven's contact phone number pre-filled.

⑥ EMAIL
Tapping this link replaces this bottom sheet with the Email Us bottom sheet.

Paving the future of mobility access

For Maven, we used service design methods to give their engineering-driven team a holistic, empathetic view of their complete customer journey for the first time — a powerful first step towards building better services for their customers.

Guided Welcome Experience

Designed a welcome and enrollment experience that helps users easily differentiate Maven's service offerings

Contextual Help

Delivered a vision for more contextual, integrated help and support surfaced at key points in the customer journey

Innovative Features
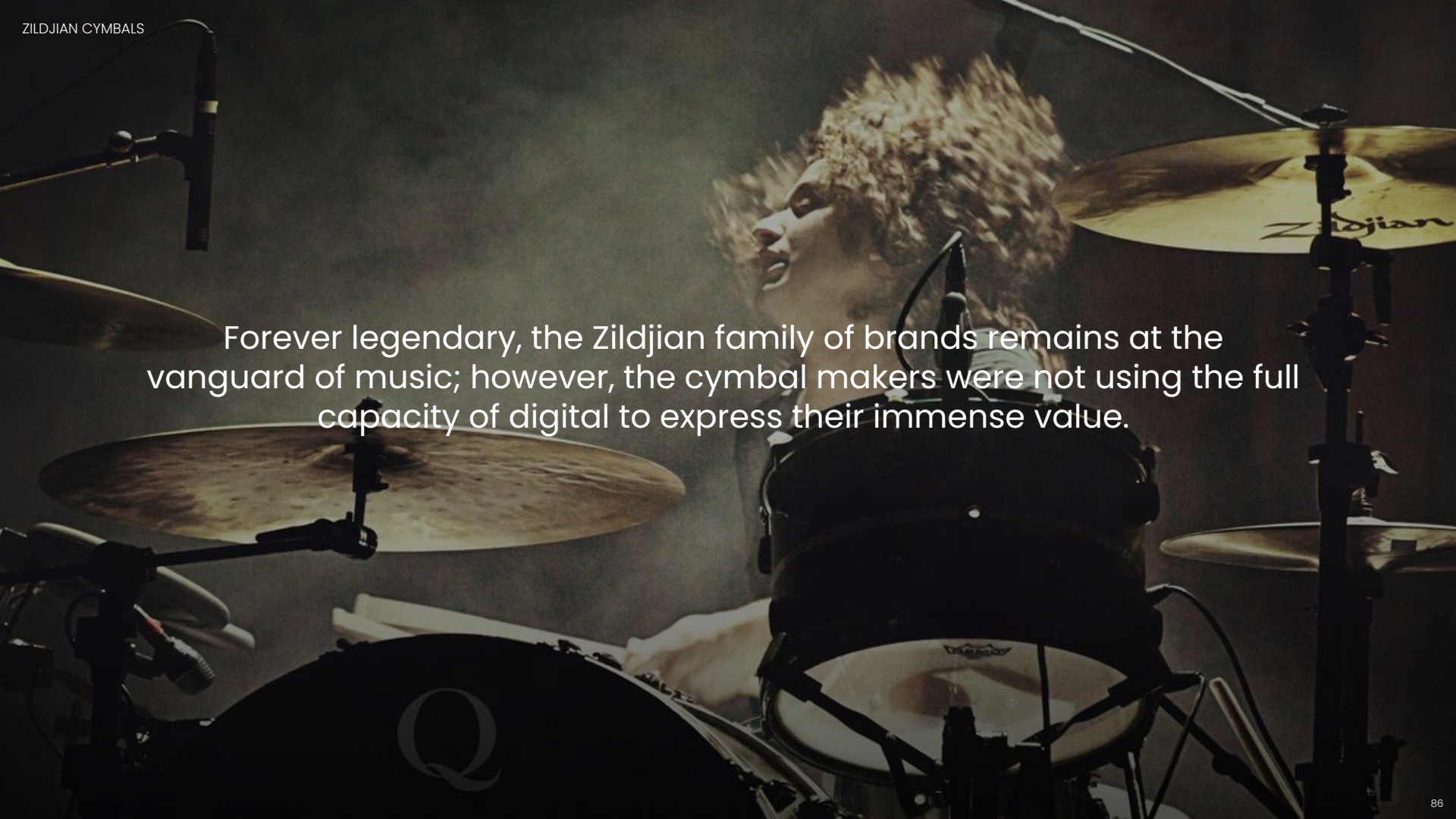
Defined concepts for new and enhanced features such as booking, EV charging, damage reporting and fraud protection.

Future Roadmap

Developed a strategic roadmap to drive product development plans for the next 3-5 years

Zildjian Cymbals

Content-Rich Multi-Brand
Ecommerce Experience

tonyowens@uxarchitect.net | www.tonyowens.net | linkedin.com/in/tonyo | 347.332.3030

Forever legendary, the Zildjian family of brands remains at the vanguard of music; however, the cymbal makers were not using the full capacity of digital to express their immense value.

By reimagining how cymbals can be experienced online, we created a powerful brand commerce experience that's in tune with musicians no matter where they are in their lifelong journey.
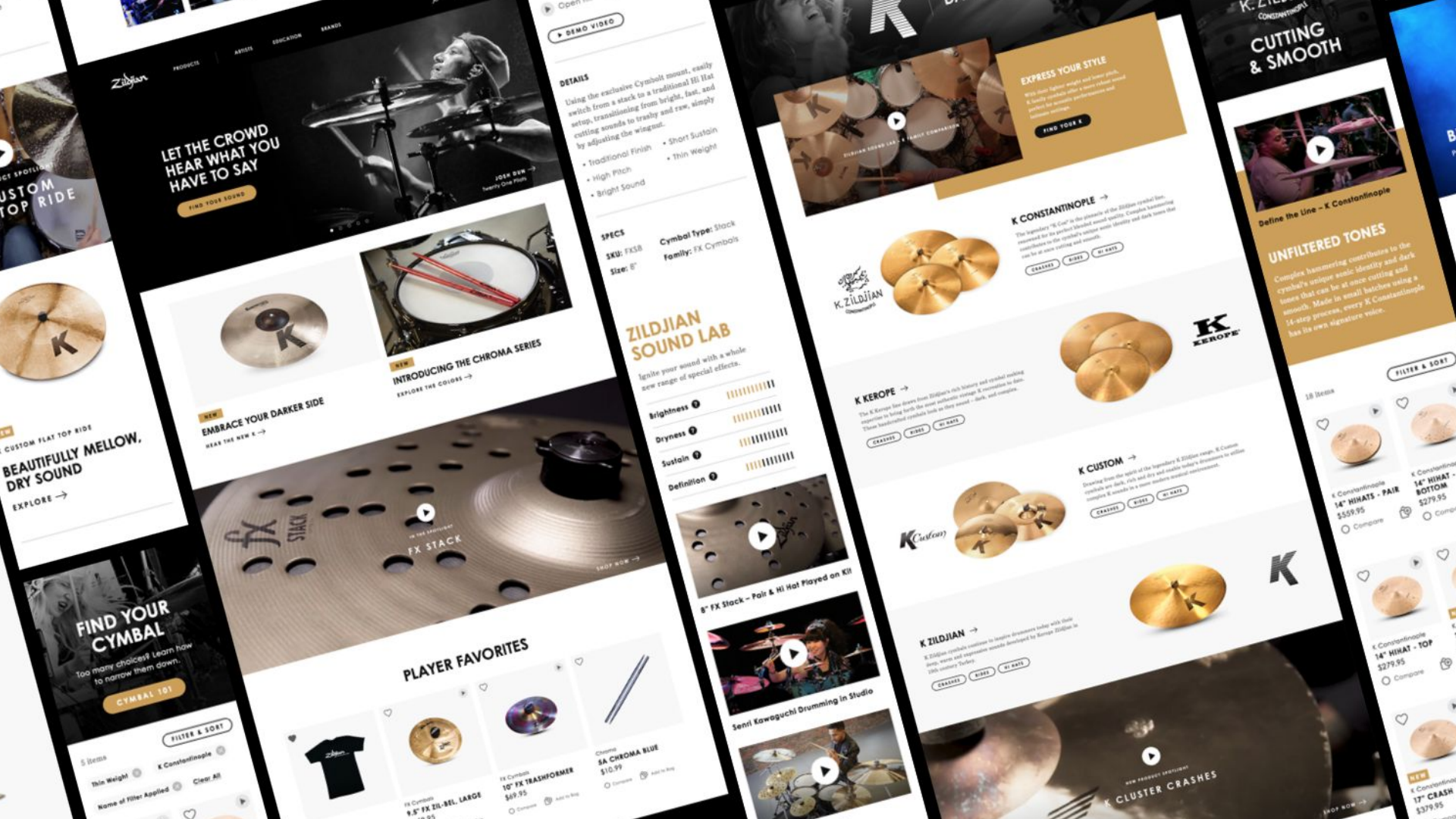
LET THE CROWD HEAR WHAT YOU HAVE TO SAY

FIND YOUR SOUND

JOSH DUN
Twenty One Pilots

NEW
INTRODUCING THE CHROMA SERIES
EXPLORE THE COLORS →

NEW
EMBRACE YOUR DARKER SIDE
HEAR THE NEW K →

CUSTOM FLAT TOP RIDE

BEAUTIFULLY MELLOW, DRY SOUND
EXPLORE →

CUSTOM FLAT TOP RIDE

FIND YOUR CYMBAL
Too many choices? Learn how to narrow them down.
CYMBAL 101

5 Items
Thin Weight
K Constantinople
Name of Filter Applied   Clear All

FILTER & SORT
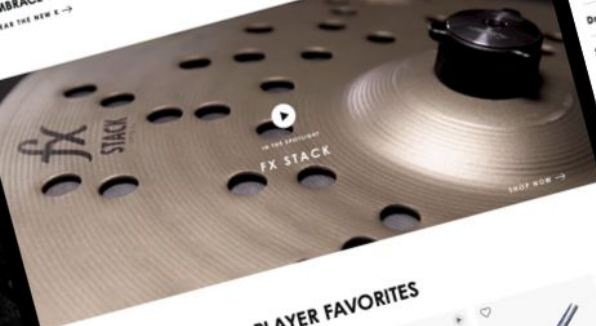
IN THE SPOTLIGHT
FX STACK
SHOP NOW →

PLAYER FAVORITES

FX Cymbals
9.5" FX ZIL-BEL, LARGE

FX Cymbals
10" FX TRASHFORMER
$69.95

Chroma
5A CHROMA BLUE
$10.99

DETAILS
Using the exclusive Cymbolt mount, easily switch from a stack to a traditional Hi Hat setup, transitioning from bright, fast, and cutting sounds to trashy and raw, simply by adjusting the wingnut.

• Traditional Finish   • Short Sustain
• High Pitch   • Thin Weight
• Bright Sound

SPECS
SKU: FXS8   Cymbal Type: Stack
                    Family: FX Cymbals
Size: 8"

ZILDJIAN SOUND LAB
Ignite your sound with a whole new range of special effects.

Brightness
Dryness
Sustain
Definition

8" FX Stack – Pair & Hi Hat Played on Kit

Senri Kawaguchi Drumming in Studio

EXPRESS YOUR STYLE
With their lighter weight and tonal pitch, K family cymbals offer a more robust sound perfect for acoustic performances and intimate settings.
FIND YOUR K

ZILDJIAN SOUND LAB – FAMILY COMPARISON

K. ZILDJIAN CONSTANTINOPLE

K CONSTANTINOPLE →
The legendary "K Con" is the pinnacle of the Zildjian cymbal line, renowned for its perfect blended sound quality. Complex hammering contributes to the cymbal's unique sonic identity and dark tones that can be at once cutting and smooth.
CRASHES   RIDES   HI HATS

K KEROPE →
The K Kerope line draws from Zildjian's rich history and cymbal making superior to bring forth the most authentic vintage K recreation to date. These handcrafted cymbals look as they sound – dark, and complex.
CRASHES   RIDES   HI HATS

K CUSTOM →
Drawing from the spirit of the legendary K Zildjian range, K Custom cymbals are dark, rich and dry and enable today's drummers to utilize complex K sounds in a more modern musical environment.
CRASHES   RIDES   HI HATS

K ZILDJIAN →
K Zildjian cymbals continue to inspire drummers today with their deep, warm and expressive sounds developed by Kerope Zildjian in 19th century Turkey.
CRASHES   RIDES   HI HATS

NEW PRODUCT SPOTLIGHT
K CLUSTER CRASHES
SHOP NOW →

CUTTING & SMOOTH

Define the Line – K Constantinople

UNFILTERED TONES
Complex hammering contribute to the cymbal's unique sonic identity and dark tones that can be at once cutting and smooth. Made in small batches using a 14-step process, every K Constantinople has its own signature voice.

FILTER & SORT

18 Items

K Constantinople
14" HIHATS - PAIR
$559.95   Compare

K Constantinople
14" HIHAT - BOTTOM
$279.95   Compare

K Constantinople
14" HIHAT - TOP
$279.95

17" CRASH

PROJECT GOAL

Bring together the Zildjian brand family online while letting each brand be itself

MY ROLE

Pitch & Proposal

- Led experience strategy and vision for the proposal
- Instrumental in planning and scoping the engagement

Discovery & Concept Exploration

- Led planning of the UX strategy and design approach
- Facilitated research, strategy, idea generation, requirements gathering and collaborative design activities for the project
- Collaborated with UX team in the site's developing information architecture and interaction design

Detailed Design & Delivery

- Planned and led the design process, facilitating Agile design sprints with cross-functional teams
- Shaped requirements and maintained the vision while partnering with the team to deliver high-quality designs

COLLABORATORS

Creative Director + Team (2)

User Experience Team (4)

VP, Technology

Technology Team

Project Manager

Chief Marketing Officer

Executive Stakeholders

Subject Matter Experts (10+)

Zildjian Digital Team

Engagement Director

The Challenge

Enabling Zildjian Brands
to Play Well Together

The Zildjian, Vic Firth and Balter brands are each unique from a point of history, meaning and product – and each has its own brand expression aligned to its promise.

While the brand requirement was centered around bringing them together, we also needed to find a solution that lets each brand be itself.

Equally important, we needed a scalable solution that works across brands to offer a unified, best-in-class experience that enables deep engagement, long-term loyalty, actionable commerce and the ability to shop across brands with ease.

Additionally, with musicians' preference for trial before purchase, Zildjian needed to put their products in the virtual hands of musicians who are unable to check them out in-store.

Our Vision

An Inspirational Lifelong Companion
On Your Journey Through Sound

For 400 years, Zildjian has shaped sound, inspiring generations of musicians.

Since today's brands can't rest on legacy, we created a modern music epicenter that elevated and simplified the shopping experience, connecting all of Zildjian's brands together for the first time.

The redesigned site fused rich content — from sample sounds to brand storytelling and live performance videos — with favorite products, nurturing a lifelong love of playing through education and personalization while setting the standard for how artists find their sound.

Three distinct brands. One navigation system. One design system. One simple checkout.

The destination for drummers everywhere.

Our Approach

Following a competitive proposal process where we collaborated with Zildjian to explore customer insights, journeys and initial creative concepts, we aligned on a three phase project to fill knowledge gaps and build on our work from the proposal.

8 WEEKS .... 4 WEEKS + ONGOING SUPPORT ....

Proposal & Discovery →

Proposal CX Insights

Proposal CX Strategy

Proposal CX Vision

UX Project Approach

Stakeholder Workshops

Content Audit & Analysis

Page & Feature Requirements

Content Requirements

Definition →

Information Architecture

Product Taxonomy

Navigation Design

UX/UI Concept Refinement

Conceptual Prototypes

UX Concept Validation

Delivery →

Style Guide

Detailed Wireframes

Functional Specifications

Interactive Prototypes

Detailed Design Comps

User Acceptance Testing

* Key activity highlighted in portfolio

CALLUM'S PATH TO PURCHASE

We asked novice drummer Callum, 21, to show how he and players like him would go about purchasing a new ride cymbal. The journey is in fact mostly performed outside of the Zildjian brand domains, and his needs for information and reassurance provide good guidance into the features and functions that the new Zildjian brand websites should deliver.

Callum searches 'ZILDJIAN' because "well I like them so that's where I'd like to start"

On the Zildjian website, he clicks CYMBALS and chooses from the ranges under BRIGHT + SWEET

He scrolls up and down the Custom category page looking for 'anything that is going to tell me about the sound'. He is not satisfied with the content

Callum wants reviews, so Googles the precise product name and 'reviews'

Callum came for reviews but "I now see it's about $350, and that's helpful here". But there is only one review

Going back to Google he next clicks on the promoted video. The third result is a Zildjian video, but he clicks the first, from Memphis Drum Store

Callum enjoys the cymbal demo, using full dynamic range and both solo and with the rest of the kit, but is disappointed it is not played with the other cymbals

After watching many more videos and reading more reviews, Callum looks for a used cymbal on eBay and local sites

Callum now wants to see the cymbal in the flesh, so heads down to his local store to see it

Proposal & Discovery

After collecting insights and collaboratively developing an initial vision for our proposal, I planned the Discovery phase to quickly fill knowledge gaps, assess content and review product catalogs, then translate our recommendations into requirements for a new multibrand commerce experience.

Customer Experience Strategy
Proposal content that translates customer, competitive and brand insights into guiding principles, key ideas and a compelling strategic framework for achieving the project's goals

Customer Experience Vision
Proposal content that leverages creative storytelling to visually demonstrate how a proposed UX design solution might address key needs throughout a customer's journey

Stakeholder Workshops
Collaborative sessions with Zildjian executives to understand context, explore opportunities and align on a unified digital brand strategy

Page & Feature Requirements
Spreadsheets mapping front-end design requirements to CMS capabilities, defining reusable components to streamline development

Content Audit & Analysis
Comprehensive review and assessment of all images, video, audio, copy and other site assets for relevance, timeliness and quality

Content Requirements
Spreadsheets capturing production needs for site content, including new video, audio, copy and product photography

Customer Insights

To showcase our approach during the proposal stage, the Strategy Director and I partnered to conduct research and develop strategic insights that would shape and inform our unique design solution for Zildjian.

Our Insights-based Approach

Our insights technique, and thus our design approach, are always founded on a deep understanding of the needs of our audience.

This response should give Zildjian a preview of this process, aimed at making our response as true to the needs of drummers and percussionists as possible.

Of course, when building the sites for real, we would enhance these starting insights with further research and user testing, and involve all the expertise of the Zildjian business in developing a true "Voice of the Player" to inform our designs.

QUANTITATIVE SURVEY
188 drummers and percussionists surveyed across the USA, UK and Canada

IN-DEPTH INTERVIEWS
14 in-person interviews to uncover musicians' needs and purchase journey

COMPETITIVE ANALYSIS
We rated Zildjian's competitors and the best of the online music stores to see what the standard for the industry is today

FORUM IMMERSION
We spent time where drummers chat and exchange tips on the web to find out what they need from brands in music

Sources of insight leveraged by Isobar for this response

ECOMMERCE TRENDS
Synthesizing the macro-trends in eCommerce to guide the features and functions possible with today's technology

SOCIAL LISTENING
Use of our NetBase suite to mine the conversation and sentiment around the Zildjian brand and its competitors

SITE ANALYTICS
Looking at traffic flows in and out of zildjian.com to determine how journeys start and where they go next

isobar & Zildjian   26

THE 3 C'S: CATEGORY

Every Purchase Journey Is Multi-Touch and Multi-Channel – and Physical Stores Will Always be Part of It

Percussion shoppers habitually 'bounce around' the internet looking for multiple sources of product information. But every source is imperfect and leaves them wanting more. Many are happy to buy most products online, but for some shoppers and some product lines, a retail store visit is essential.

CALLUM'S PATH TO PURCHASE

We asked novice drummer Callum, 21, to show how he and players like him would go about purchasing a new ride cymbal. The journey is in fact mostly performed outside of the Zildjian brand domains, and his needs for information and reassurance provide good guidance into the features and functions that the new Zildjian brand websites should deliver.

IMPLICATIONS FOR DIGITAL AND COMMERCE:

› Zildjian sites should provide as much of the information required in as credible a way as possible: sound and video, kit setups, artist endorsements etc

› Provide the social proofing within the purchase process that users are currently seeking outside of brand websites: reviews, forums, UGC, etc.

› Implement Find a Store feature and augment as soon as possible with in-store stock availability to drive purposeful footfall

› Invest in Search to capture large latent demand that is missed today

› Incorporate and discount bundles and recommendations to ease decision-making and maximize basket on every purchase

isobar & Zildjian   33

THE 3 C'S: CATEGORY

Sound is a Critical Research Need, Which is Rarely Delivered Online

"What does it really sound like?" is the most important question by far. But answers are hard to find, and drummers spend a huge amount of time and effort trying to answer it. When we listened to drummers we were able to draw up a list of what it takes to really 'get' the sound of a cymbal, without trying it out for real.

In this day and age there is no excuse not to have a really good video of every single cymbal.

STEFAN, SESSION DRUMMER, 26

I love videos, but it's usually some white guy playing a generic blues pattern who talks about himself for 20 minutes first. I just want to Hear The Thing. Just that.

RAINY, DRUMMER, 33

29% of zildjian.com users leave and go straight to YouTube

IN-DEPTH INTERVIEWS

We asked all our drummers to recreate a cymbal demo video. Here's what they need:

1. Full dynamic range of cymbal
2. Multiple types of strike (edge, bell, slide, wash, shoulder etc)
3. Hear attack and delay up close
4. Played with drums as part of a beat
5. Played with drums AND other cymbals
6. Played with other instruments
7. Basic mic technique with minimal post-production
8. With and without kick for cymbals
9. NO talking - get straight to the sound
10. Cymbal is handled to show weight and bend

Videos like Meinl's GO, with Chris Coleman, are seen as useless as shopping guides by drummers. They are so heavily mixed and produced that they can't be a clear or honest representation of the cymbals' sound.

IMPLICATIONS FOR DIGITAL AND COMMERCE:

› Zildjian to invest in further content in the style of the Zildjian Sound Lab, but in a standard format to help drummers get THE authoritative sound of the cymbal

› Videos are placed on product and range pages as key decision drivers Create a modular online kit-builder tool to help shoppers listen to drums and cymbals in combinations they determine.

isobar & Zildjian   35

Brand Architecture

Based on Zildjian's desire to bring three brands together while enabling each brand to be itself, I guided the team through two traditional approaches to multi-brand site architecture, then advised them on a third "hybrid" approach that would align with Zildjian's unique brand goals.

A Unified Navigation & Design System

Imagining ways that Zildjian's brands could co-exist, the Creative Director and I partnered to develop a unified design system that would allow each brand to shine, plus a navigation approach that optimizes choice, clarity and convenience for the customer.

Opportunity lies in the stages of the customer journey

PRE-PURCHASE

PURCHASE

POST-PURCHASE

ACTIVATION

Inspire, excite and attract
customers through digital
content engagement.

- Social & Email Engagement
- Content Strategy
- Sound Exploration Tools
- SEO/SEM

→

CONVERSION

Keep purchase
motivation alive while
creating more fluid paths
to purchase.

- Enhanced Mobile Experience
- Social Validation
- Site Personalization
- Driving Store Visits

→

EXTENSION

Continue the conversation
with more personalized
content, community and
loyalty rewards.

- Personalized Content
- Community Engagement
- Loyalty Rewards
- Empowering Influencers

BRAND EXPERIENCE PILLARS

INSPIRE

Create delightful opportunities to connect, excite and engage.

EDUCATE

Support critical journey moments to build lasting relationships.

GUIDE

Help drummers express themselves and their unique style.

The Customer Experience Vision

To convey our proposed vision for Zildjian's future digital brand commerce experience, I imagined two creative personas of drummers to guide our customer journey storytelling and design: a student who aspires to be great; and a professional who has "made it", with a defined style and sound.

Stella - The Student

- 16 years old
- Drum student for a year
- Loves Parkway Drive
- Inspired by all drummers, especially female ones
- Ready to start her own rock band
- Wants to buy her first kit

isobar & Zildjian

Pedro - The Professional

- 34 years old
- Professional drummer for 12 years
- Getting hired for more jazz gigs and wants to expand his sound to match
- Has a new ride cymbal in mind

Enter The Lab

At the Zildjian Digital Sound Lab page, Pedro sees a virtual setup of his current kit. He opens a list featuring cymbals he has bought, favorited and recently viewed. He can assign cymbals from the list to his virtual kit so he can get a feel for how his new setup might sound.

Once his kit is all set, Pedro chooses a jazz favorite from the embedded player, and puts on his headphones. He then enters Play Mode and plays along on his virtual kit, tapping out rhythms while listening closely to the way each cymbal sounds.

Zildjian SOUNDLAB

PLAYING ON: PEDRO P: JAZZ KIT A
TRACK: BILLY DRUMMOND'S DOUBLE TIME

PAUSE TRACK

TAP CYMBALS TO PLAY
ALONG WITH THE TRACK
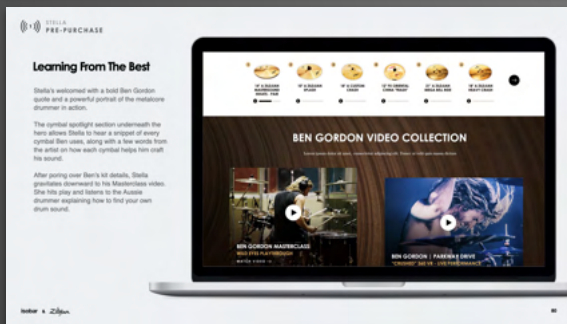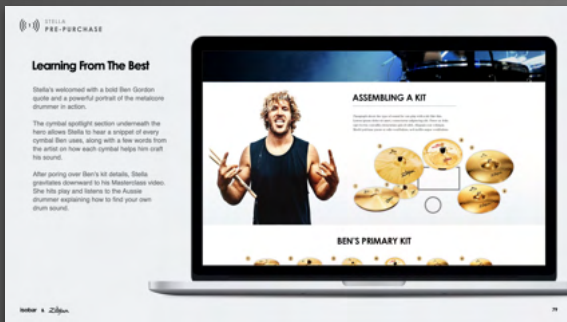
isobar & Zildjian
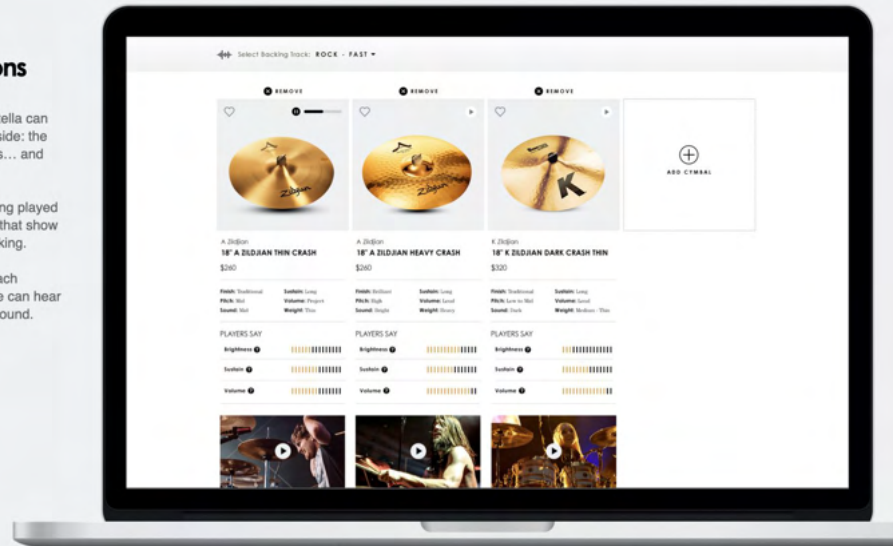
Finding Her Sound

Inspired, Stella launches the Zildjian Cymbal Finder so she can evaluate and narrow down the list of crashes.

She filters her choices into a smaller grid of cymbals she believes will deliver her desired sound.

After reading all the product descriptions – and listening to how each one sounds – she has her finalists. For each cymbal she likes, she clicks, 'Add to Compare'. Time to decide.
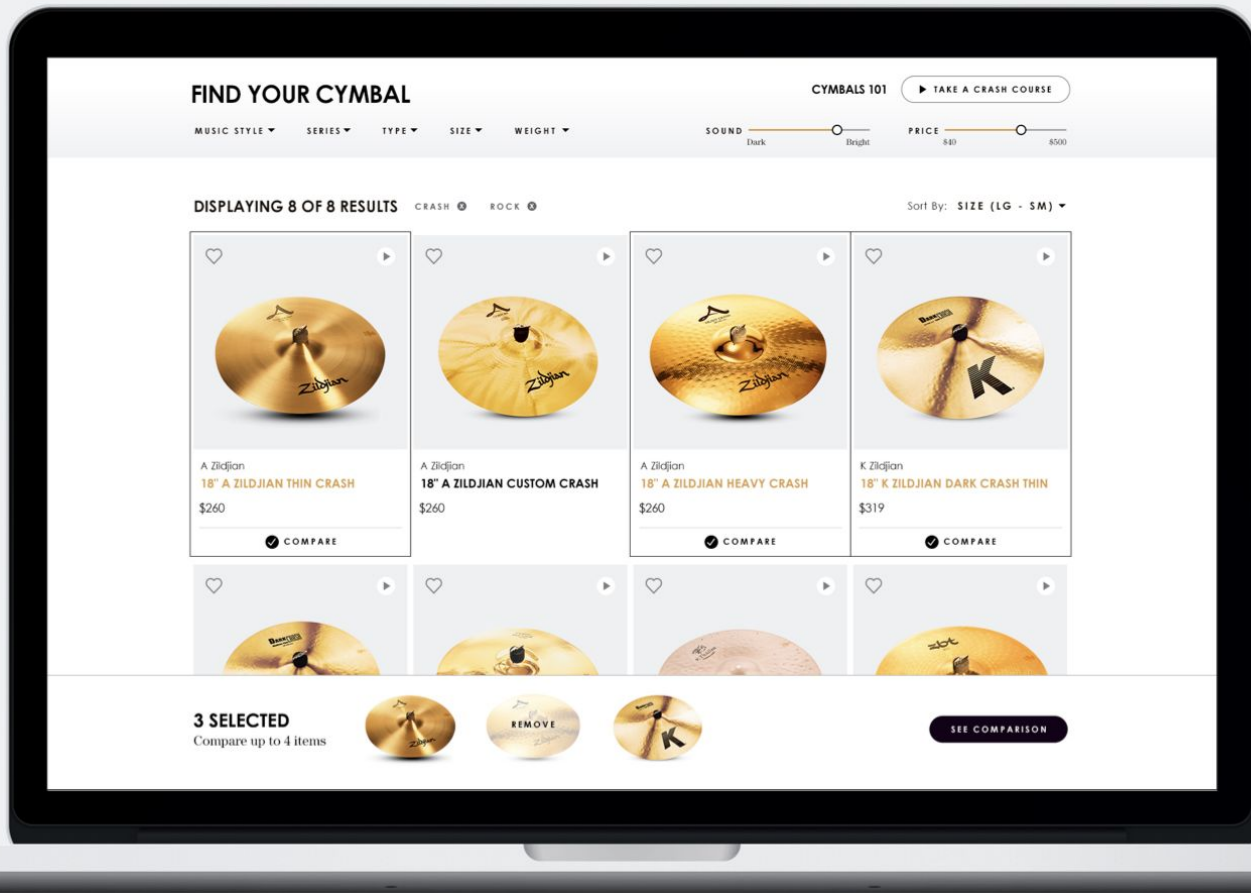
FIND YOUR CYMBAL

CYMBALS 101 ▶ TAKE A CRASH COURSE

MUSIC STYLE ▾   SERIES ▾   TYPE ▾   SIZE ▾   WEIGHT ▾

SOUND Dark ——●—— Bright

PRICE $40 ——●—— $500

DISPLAYING 8 OF 8 RESULTS   CRASH ✕   ROCK ✕

Sort By: SIZE (LG - SM) ▾

A Zildjian
18" A ZILDJIAN THIN CRASH
$260
✓ COMPARE

A Zildjian
18" A ZILDJIAN CUSTOM CRASH
$260

A Zildjian
18" A ZILDJIAN HEAVY CRASH
$260
✓ COMPARE

K Zildjian
18" K ZILDJIAN DARK CRASH THIN
$319
✓ COMPARE

3 SELECTED
Compare up to 4 items

REMOVE

SEE COMPARISON

All In The Details

Stella has made her final choices, but she still wants to be sure. So, she explores each cymbal's product page, listening again to various samples.

She can also enlarge the image of the cymbal to closely explore the brilliant copper finish from rim to bell.

There's also a fair bit of exciting content to dive into, including a video from another drummer she worships.

All In The Details

Stella has made her final choices, but she still wants to be sure. So, she explores each cymbal's product page, listening again to various samples.

She can also enlarge the image of the cymbal to closely explore the brilliant copper finish from rim to bell.

There's also a fair bit of exciting content to dive into, including a video from another drummer she worships.

Workshops & Requirements Gathering

Following the success of our proposal, I planned a short Discovery phase to quickly fill knowledge gaps and address key questions in preparation for further exploring, refining and validating the concept design during the project's Definition phase.

Our Goal

- Design & build a new ecommerce experience to support two brands
  - Zildjian
  - Vic Firth
- Preserve the identity of each brand
  - Consumers should be able to "immerse" in each brand
- Build both experiences on a common back-end
  - Create a consistent, easy-to-manage structure for both experiences
  - Explore ways to cross-promote & provide a seamless, unified account & checkout experience

SESSIONS

Project Kickoff
Bring together the core project team, review project goals and schedule, and set expectations for activities to be conducted during the Discovery phase.

Product Catalog Review
Discuss specific questions related to Zildjian's product catalogs across brands, including opportunities to normalize structures, refine/extend data attributes, categorize/filter products and address other challenges to align with the web experience.

Content Review
Review content examples, both existing and currently being developed by Zildjian, that may be relevant to our project efforts, including video, audio and editorial content pertaining to brands/brand-building, products, artists and education. Discuss opportunities to create additional content as needed.

Campaign, Promotion & Social Strategy Review
Discuss requirements for digital campaign variations (e.g lead generation, social engagement, product promotion/sale, etc.) and flexible promotional areas across the site. Review social engagement strategy and moderation approach, and align on channels/ hashtags to be represented in the web experience.

Brand Architecture Workshop
Explore, discuss and make key decisions regarding the new website's brand architecture, including shared versus siloed artist/education/product content, managing artist brand affiliations, page-specific brand expression, cross-promotional approach and implications for domain structure. Align on a set of key requirements for the website navigation and key pages of the experience.

Requirements Gathering (Brand, Ecommerce, Artist, Education, Corporate, and Additional)
Review and align on key content/functional requirements, priorities and enhancements.

CYMBALS

BROWSE BY TYPE >

DRUMSET >

BAND & ORCHESTRAL >

STICKS & MALLETS

STICKS >

BRUSHES & MALLETS >

MERCH

K FAMILY

K Constantinople

K Kerope

K Custom

K Zildjian

A FAMILY

A Avedis

A Custom

A Zildjian

L80 LOW VOLUME

FX

GEN16

Gen16 Cymbals

Gen16 Accessories

CYMBAL SETS

K Cymbal Sets

A Cymbal Sets

CYMBAL FINDER
Fine-tune your search for the perfect cymbal.

NEW RELEASES

ABOUT OUR CYMBAL FAMILIES

The Definition Phase

With much of the direction defined during the proposal stage, our Definition phase focused on establishing alignment on creative look and feel, UI concept, navigation and page layouts before moving into Detailed Design.

Site Architecture
Detailed navigation structure and content strategy recommendations to merge Zildjian, Firth and Balter into a single unified site experience

Creative Mood Boards
Creative explorations intended to explore high-level look, feel and style prior to actual screen design

Conceptual Prototype
An interactive model of key screens and journeys built to share and validate early working concepts with broader audiences

Product Catalog & Attributes
Analysis and normalization of product catalog structure, taxonomy and data elements across three brands to fit one unified navigation system

UX/UI Concept Exploration
High-level design of key screens sufficient to establish consensus on the overal product vision

UX Concept Testing
Interactive models of key screens and journeys built to share and validate with UX concept testing participants

Home - Desktop (Zildjian)
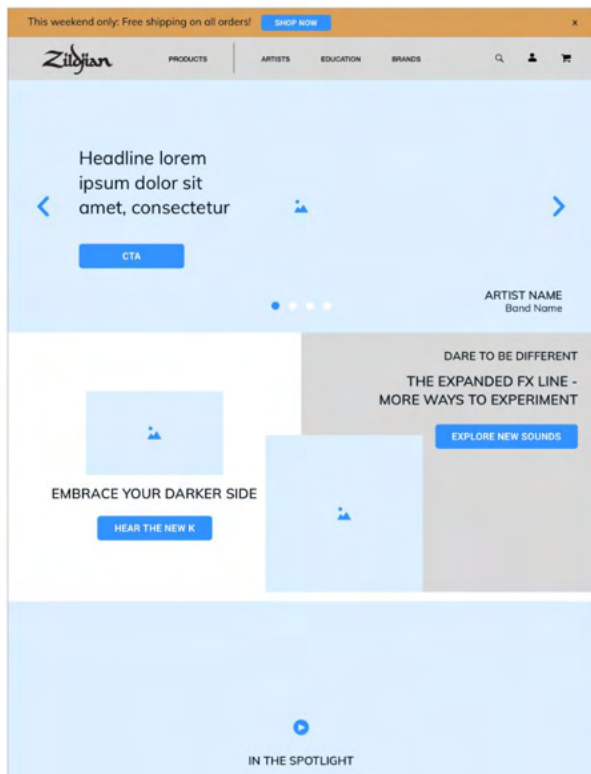
Notes

This page is designed to a 1024px width but is scaled down 90% to fit on this page. This desktop layout will be used until the window reaches the tablet breakpoint at 768px.

Strategy

- Offer a balance between brand content and product offerings.

Key Requirements

- Hero image may be animated (no audio)
- Ability to update hero slides with new slides (artists and campaign features)
- All promo units can be enabled/disabled
- Instagram social feed: Zildjian = #MyZildjian
- Social feeds should have ability to play videos or expand images from social feed; also consider ability to 'heart' or comment on that content w/o leaving the site (if an extension provides that ability)
- Storytelling block will have ability for multiple content variations (how its made, brand history/heritage, etc.) and format variations (carousel for sequential storytelling, static content module that changes on each page

ut id elit.

Navigation (Zildjian)

1024 width

768 width
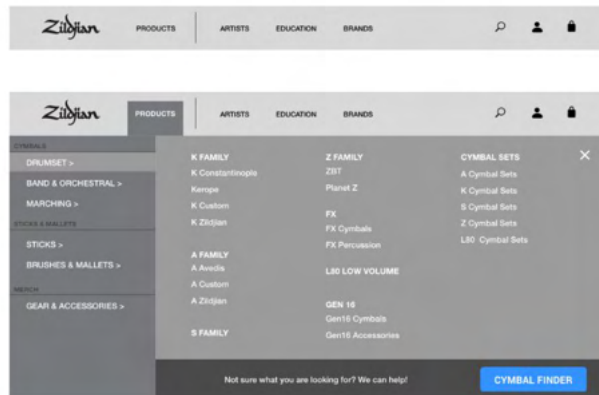
Notes

This page illustrates our approach for the main site navigation (Zildjian). It includes both Large(1024), Medium(768), and small (320) screen width sizes. XL (1440+) screen sizes will be specified during our Detailed Design phase. Towards the bottom a few more menus are included to illustrate the options for the different menu items under the Products label.

Strategy

- Maintain the design and layout as close as possible from the proposed navigation during the RFP process.
- These designs reflect updates driven by findings and requirements from Discovery phase.
- Make use of an improved product taxonomy (separate document) to help navigation between product offerings.
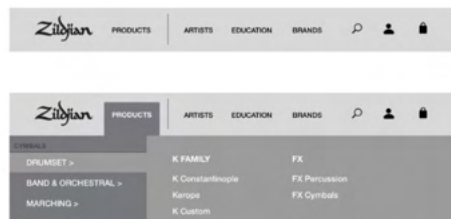
Key Requirements

- Provide main nav design and layout for different screen sizes based on key breakpoints.
- Include ability to navigate to Products, Artists, Education, Account, Cart, (Product) Search, and between Brands.

Insights / Considerations

- We are using the label "Products", rather than spelling out every product type on the nav bar, as it allows for a cleaner look as well as greater flexibility and

Product Detail - Desktop (Zildjian)

Notes

This page is designed to a 1024px width but is scaled down 90% to fit on this page. This desktop layout will be used until the window reaches the tablet breakpoint at 768px.

Strategy

- Allow users to quickly switch between variants of a product.
- Provide all images at once without having to click through a carousel

Key Requirements

- Page content will update based on attribute selection (e.g. size, sets)
- Some products (e.g. sticks) may not use product attribute selectors at all
- Some products may not have sound files (e.g. sticks)

Insights / Considerations

- Nullam id dolor id nibh ultricies vehicula ut id elit.

Open Questions & Needs

- Would users find it helpful to scrub through sound demos?
- Sound Qualities ratings need to be created and populated
- Product catalogs may require updates to reflect new data attributes
- Zildjian R&D team effort may be needed to evaluate sound characteristics and load them in to data. Will need to finalize which sound attributes during concept design (brightness/darkness, etc).

Product Detail - Desktop (Vic Firth)

Notes

This page is designed to a 1024px width but is scaled down 90% to fit on this page. This desktop layout will be used until the window reaches the tablet breakpoint at 768px.

Strategy

- Provide all images at once without having to click through a carousel

Key Requirements

- Page content will update based on attribute selection (e.g. size, sets)
- Some products (e.g. sticks) may not use product attribute selectors at all
- Some products may not have sound files (e.g. sticks)

Insights / Considerations

- Nullam id dolor id nibh ultricies vehicula ut id elit.

Open Questions & Needs

- Product catalogs may require updates to reflect new data attributes

Product Details (Zildjian)

Notes

This page is designed to a 320px width. This desktop layout will be used until the window reaches the tablet breakpoint at 768px.

Strategy

- Allow users to quickly switch between variants of a product

Key Requirements

- Page content will update based on attribute selection (e.g. size, sets)
- Some products (e.g. sticks) may not use product attribute selectors at all
- Some products may not have sound files (e.g. sticks)

Insights / Considerations

- Nullam id dolor id nibh ultricies vehicula ut id elit.

Open Questions & Needs

- Would users find it helpful to scrub through sound demos?
- Sound Qualities ratings need to be created and populated
- Product catalogs may require updates to reflect new data attributes
- Zildjian R&D team effort may be needed to evaluate sound characteristics and load them in to data. Will need to finalize which sound attributes during concept design (brightness/darkness, etc).

The Delivery Phase

During this phase, we iteratively designed and tested responsive page layouts, components, modules and features to ensure that the new Zildjian site is both high impact and easy to manage.

Style Guide

A guide to the product's visual structure and style, including design patterns defined for developers

Detailed Wireframes

Design document detailing functional behavior and interactions to guide feature implementation

Functional Specifications

A spreadsheet based on the wireframes that captures underlying business rules and assumptions behind the design

Interactive Prototypes

Basic working models of selective application interfaces built to clarify expected behavior

Detailed Design Comps

Pixel-perfect representations of application screens used by developers as assets for implementation

User Acceptance Testing

Support in planning and performing feature acceptance tests prior to a product release

Zildjian - Products Menu (1024)

PRODUCTS   ARTISTS   EDUCATION   BRANDS

1 PRODUCTS LABEL
On click, this label renders the Products menu. When the Products Menu is opened, clicking this label closes the menu, while the Products Menu is opened, this label is highlighted to indicate that the Menu corresponds to Products.

The Products menu will have some, but limited, flexibility for updating. The right hand side container within the menu follows a 3-column layout for 675px and higher screen widths. The third column is always used for "Find your Cymbal", "New Releases", and "Learn About..." links. First and Second columns are used for Family and Series product options/links. The two columns should be balanced in the number of options to better fill up the space. Series options within a Family should always stay below the Family label on the same column.

2 PRODUCTS MENU
This is the Products Menu. It contains a left hand column with multiple options, and a right hand side container. As the user clicks on the different options to the left, the container to the right changes to display the corresponding options for that item.

Items on the left hand column are organized/grouped by product segments (Cymbals, Sticks & Mallets, Merch). These segment labels are only to organize the options and are not clickable.

3 CLOSE ICON
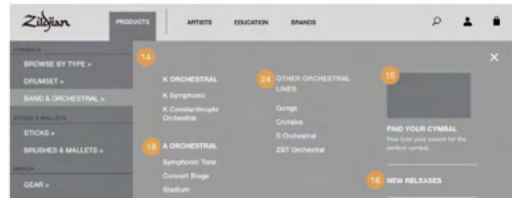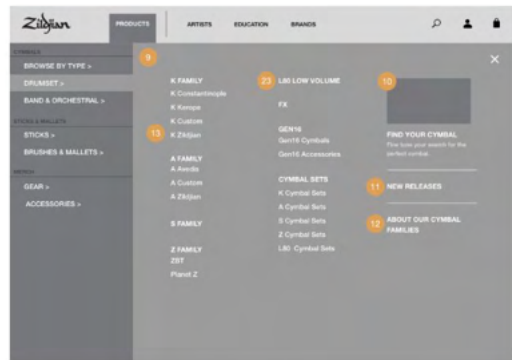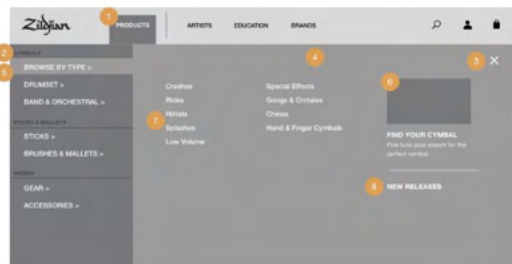Clicking on this icon, or anywhere outside the menu, closes out the Products menu.

4 MENU LAYOUT
This Products menu is a full-width element for 1024+ screens. It has a minimum height dictated by the elements on the left hand column. The height of the menu changes to accommodate the content/options on the right container. As the user selects the different left hand side options the menu grows accordingly.

Reference visual design playbook for exact dimensions for each element within this menu.

This right hand side container follows a three column layout on 1024+ screens.

5 CYMBALS SEGMENT
This grouping contains Browse by Type, Drumset, and Bland & Orchestral. On click, each label will render a corresponding set of options on the right hand side container. Each label will be visually highlighted when selected. By default, this Products menu will always open with Browse by Type selected.

6 FIND YOUR CYMBAL
Clicking on this element will redirect users to the Cymbal Finder page with no added filters. This element includes an image, copy, sub-copy.

7 BROWSE BY TYPE
These series of links will redirect users to the Cymbal Finder page pre-filtered by the corresponding filter (filtered by Crashes, or by Rides, etc.)

8 NEW RELEASES LINK
This link redirects users to a New Releases page which can be realized with a Campaign Product page template.

9 DRUMSET CYMBALS MENU
These are the menu options for Drumset Cymbals.

10 FIND YOUR CYMBAL
Clicking on this element will redirect users to the Cymbal Finder page with no added filters. This element includes an image, copy and sub-copy.

11 NEW RELEASES LINK
This link redirects users to a New Releases page which can be realized with a Campaign Product page template.

Key Menus - (320)
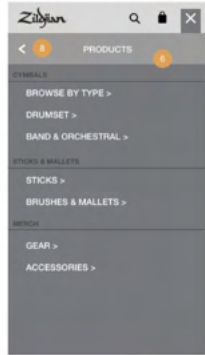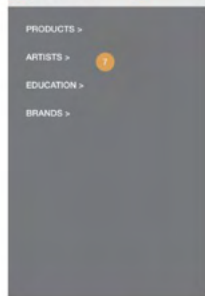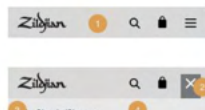
DESCRIPTION
This page illustrates a few key examples for navigation menus on mobile screens (320px - 767px wide). It also represents the key behaviors when the site adapts to mobile screens. The details and specifications found here apply to both Zildjian and Vic Firth brands/sites.

1 MOBILE NAVIGATION BAR
On mobile screens the navigation bar gets simplified to include the logo to the left, then Search, Bag (Cart), and Hamburger Menu to the right.

This bar is semi-sticky, which means that it will auto-hide when the user scrolls down but it will come back as soon as the user scrolls back up.

2 HAMBURGER ICON
On tap, this icon will reveal the menu within the Hamburger icon. This menu contains the menu options for Account, Products, Artists, Education, and Brands.

Tapping again on this icon (or anywhere outside the menu) will then close out the menu.

Only one main navigation menu can be open at a time.

Note: All navigation menus on mobile screens are full-width.

3 HAMBURGER MENU OPTIONS
This full-width menu includes links to Account, Products, Artists, Education, and Brands menus. Tapping on any of these links will animate and transition to the left to reveal the contents of the corresponding menu.

4 NOT SIGNED IN
This example shows the state of this menu for when the users is not signed in.

5 SIGNED IN
This is the state of the Hamburger Menu for when the user is signed in.

6 PRODUCTS MENU OPTIONS
On this example the user has selected Products from the Hamburger Menu intial state.

The sub-menu headers are fixed so when the user scrolls the long menu options beneath, the content goes behind it.

7 SUB-MENUS TRANSITION
Every time a user makes a selection to drill into a sub-menu the screen animates to reveal the sub-menu by transitioning to the left.

8 BACK ARROW (UP)
Tapping on this arrow allows the users to go back to the previous menu. To reveal the previous menu the screen animates and transitions to the right.

9 BROWSE BY TYPE (CYMBALS)
This example illustrates that the user has opened the Hamburger Menu then selected Products > Browse By Type (Cymbals).

10 BROWSE BY TYPE MENU
The layout for this sub-menu (found on the right hand side container on Desktop under the Products menu) is then simplified by showing a smaller image for the Cymbal finder link and all the elements and links are stacked in a single column.

11 EDUCATION MENU
This example illustrates when a user has selected the Hamburger Menu > Education. This menu, and similar ones (Artists, Brands), gets simplify by stacking elements, and the Featured ones become a 2x2 arrangement.

12 SITE SEARCH
On mobile, Search feature can be found on the main navigation

116

Category - Basic Template (1024px)
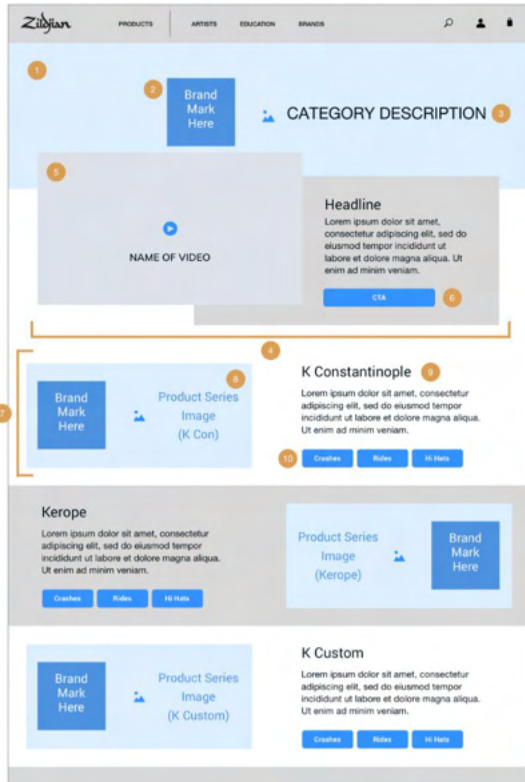
DESCRIPTION

This page represents the default state of the Category page. Although the design depicts the Zildjian brand, the same format and functionality applies to the Vic Firth brand as well.

This page is designed for screens between 1024-1439px wide, although it has been scaled down to fit on this screen. For behavior at widths smaller than 1023px see Mobile Template, or larger than 1439px see Global Framework section.

The tablet (768-1023px) layout of this page more closely resembles the mobile layout. See mobile page for more details.

Please note that all copy is for placement only. Also, some components are optional which has been noted in the annotations below.

1. **HERO IMAGE**
Background image used in hero space for this category.

2. **BRAND MARK**
Brand mark or logo for this category. This asset is separate from the background hero image.

3. **FAMILY DESCRIPTION**
Short description of the unique qualities of this category. (e.g. "Dark & Rich")

4. **FEATUED CATEGORY VIDEO**
Video representing the category paired with a headline and brief copy explaining what makes this product unique. This component is optional and may be disabled if there is no appropriate video content.

5. **VIDEO**
Video relevant to the category with video title. Video plays in video player modal.

6. **CYMBAL FINDER CTA**
Navigates the user to the Cymbal Finder filtered to only products in this Category.

7. **SUB-CATEGORY LISTING**
Item in a list of Sub-Categories within this Category. Contains a product image, brand mark (separate asset from product image), name, brief description, and CTAs for product types.

Note: The list of Sub-Categories is presented in an alternating layout. See visual designs for this pattern. A maximum of 15 items should be used in this list.

8. **PRODUCT IMAGE**
Thumbnail image of a representative product in this sub-category.

9. **SUB-CATEGORY NAME & DESCRIPTION**
Headline consists of name of sub-category and serves as link to that sub-category page. Copy beneath serves as brief description of the sub-category.

10. **PRODUCT TYPE CTAS**
Links to the Sub-Category page filtered down to the specific product type selected.

11. **PRODUCT SPOTLIGHT VIDEO**
Still representing the product spotlight video for one product in this Category. Contains a title, label, and play icon. Clicking anywhere in the video area (outside of the optional CTA in the lower right corner) triggers playback in video player.

Note: This module is optional and may be disabled completely.

Sub-Category - Basic Template (1024px)
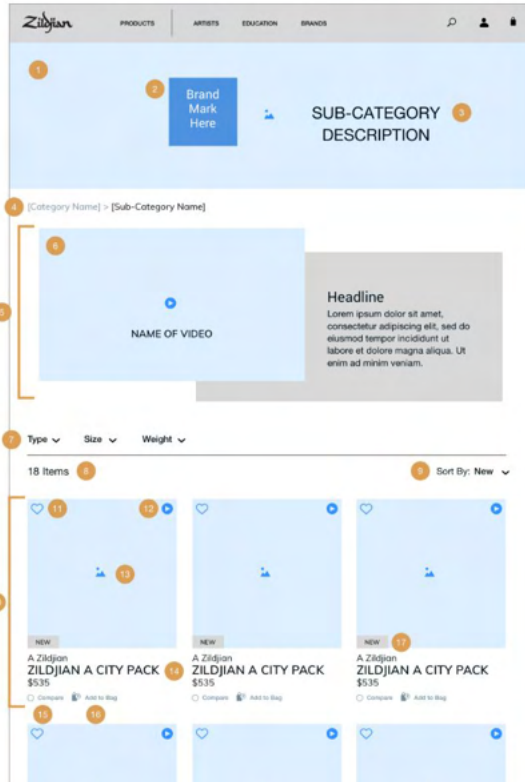
DESCRIPTION

This page represents the default state of the Sub-Category page. Although the design depicts the Zildjian brand, the same format and functionality applies to the Vic Firth brand as well.

This page is designed for screens between 1024-1439px wide, although it has been scaled down to fit on this screen. For behavior at widths smaller than 1023px see Mobile Template, or larger than 1439px see Global Framework section.

The tablet (768-1023px) layout of this page more closely resembles the mobile layout. See mobile page for more details.

Please note that all copy is for placement only. Also, some components are optional which has been noted in the annotations below.

1. **HERO IMAGE**
Background image used in hero space for this Sub-Category.

2. **BRAND MARK**
Brand mark or logo for this sub-category. This asset is separate from the background hero image.

3. **SUB-CATEGORY DESCRIPTION**
Short description of the unique qualities of this sub-category. (e.g. "Cutting & Smooth")

4. **BREADCRUMBS**
Documents each of the previous levels of page hierarchy (e.g. Category, Sub-Category) before this level (excluding the Homepage). The previous pages are selectable links that navigate the user to the listed pages. The current page is styled differently and is not selectable.

5. **FEATUED SUB-CATEGORY VIDEO**
Video representing the sub-category paired with a headline and brief copy explaining what makes this product unique. This section is optional and may be disabled if there is no appropriate video content.

6. **VIDEO**
Video relevant to the sub-category with video title. Video plays in video player modal.

7. **FILTERS**
For cymbals (pictured) Type, Size, and Weight filters which narrow down the results below upon selection.

For sticks the filters are Diameter, Length, Taper, Material, Tip Material, Tip Shape, and Finish (which includes Finish and Color filter options).

For mallets the filters are Instrument, Head Material, and Handle.

For gear there would be no filters.

8. **NUMBER OF ITEMS**
Displays the number of items in the list below that match the current filters.
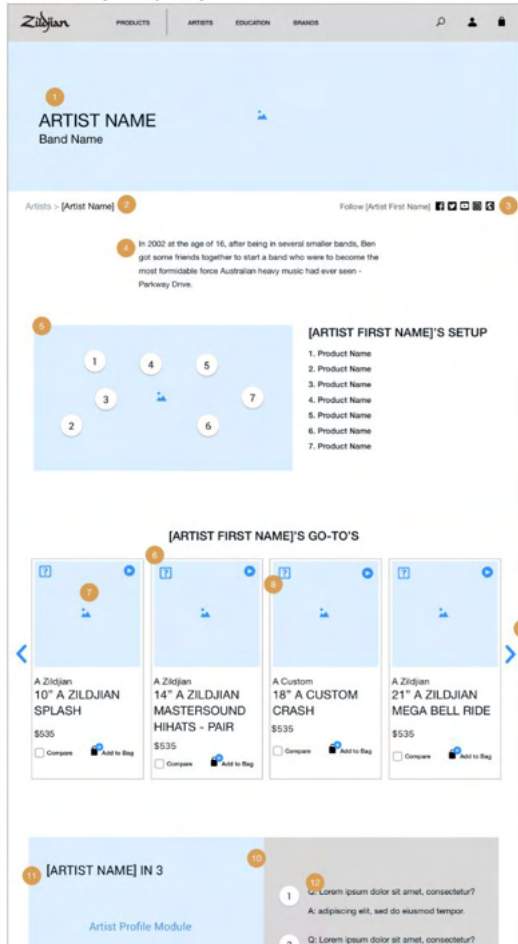
9. **SORT**
Dropdown with options to sort the items below in a particular order. Defaults to New so the newest-added products appear at the top of the list. Other options are A-Z, Z-A, Price (Low-High), and Price (High-Low).

10. **PRODUCT LISTING**
Selectable tile in the product list which user may take several actions upon, or which the user may use to navigate to the Product Detail page.
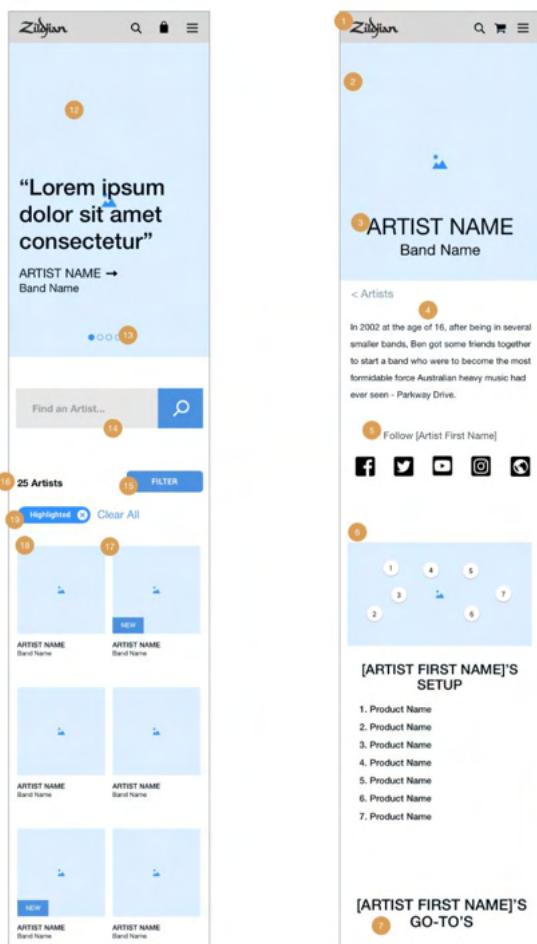
Detail Template (1024)

Zildjian — PRODUCTS   ARTISTS   EDUCATION   BRANDS

ARTIST NAME
Band Name

Artists > [Artist Name]

Follow [Artist First Name]

In 2002 at the age of 16, after being in several smaller bands, Ben got some friends together to start a band who were to become the most formidable force Australian heavy music had ever seen - Parkway Drive.

[ARTIST FIRST NAME]'S SETUP

1. Product Name
2. Product Name
3. Product Name
4. Product Name
5. Product Name
6. Product Name
7. Product Name

[ARTIST FIRST NAME]'S GO-TO'S

A Zildjian
10" A ZILDJIAN SPLASH
$535
Compare   Add to Bag

A Zildjian
14" A ZILDJIAN MASTERSOUND HIHATS - PAIR
$535
Compare   Add to Bag

A Custom
18" A CUSTOM CRASH
$535
Compare   Add to Bag

A Zildjian
21" A ZILDJIAN MEGA BELL RIDE
$535
Compare   Add to Bag

[ARTIST NAME] IN 3

Artist Profile Module

Q: Lorem ipsum dolor sit amet, consectetur?
A: adipiscing elit, sed do eiusmod tempor.

Q: Lorem ipsum dolor sit amet, consectetur?

This page illustrates the Artists Detail page template for screens 1024px+. In general, tablet screen sizes for this page follow this desktop layout except where specified. This template design and specifications apply to both brands/sites.

1. HERO AREA
On top of every Artist page sits this Hero area, which includes a full width image (static with no carousel), artist name, and band name.

2. BREADCRUMBS
On second-level pages, a breadcrumb is used to orient the users and allow them to go up one level.

3. SOCIAL LINKS
These are social links related to the artist social media accountas well as their own website (if included). On click, these links open a new browser tab and navigate users to the artists corresponding page.

4. ARTIST BIO COPY
This block of copy is centered on the page. This is an optional element as not all artist will have this information. If left blank then the next module will be pushed up on the page.

5. ARTIST'S SET UP
On this section of the template, the artist's set up will be showcased by having an image of their drumset setup and mapping the cymbals to a list of products (placed on the right hand side of the image). The mapping of the cymbals on the image to a product list will be done manually by a content manager. This module is static with no interactivity.

This is an optional component as not all artists will have this info/content.

6. ARTIST'S GO-TO'S
This block on the page showcases the products associated with the artist. The data has already been set up to match a set of products with each artist. Each artist has at least one product. If there are more than 4 products then this element turns into a carousel.

7. PRODUCT TILE
This product tile (and block) is the same format as found on other pages (Product Detail page "You May Also Like"). This tile contains a product image, add-to-favorites icon, sound feature (icon), category name, product name, price, compare and add to bag functionality.

8. PLACEMENT
When less than four product tiles are available then the tiles should be centered on this row.

9. LEFT/RIGHT ARROWS
When there are more than four product tiles, then this block turns into a carousel and reveal these arrows on both sides. Clicking on the left and right arrows paginates to the next set of product tiles. User can go left or right to cycle through all the product sets.

10. ARTIST IN 3
This module is designed to feature 3 "questions and answers" to get to know the artist. It includes a profile image, a header, and copy.

11. HEADER
This header element sits on top of the profile image and includes the artist [first name] + copy. It is placed on top left corner of the image, for exact placement reference the visual design playbook.

12. Q&A SECTION
This section within this module includes copy for the 3 questions and corresponding answers. An stylized bulleted number is included with each Q&A set.

13. BEHIND THE KIT
This next module its designed to feature images and videos associated with the artist. The data mapping the content to the artist has already been set up. This module should support 1 video/image and up to several (~6-8).
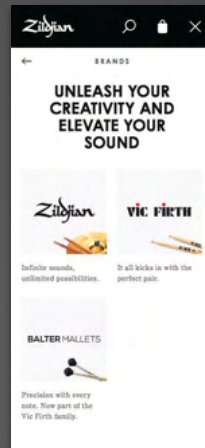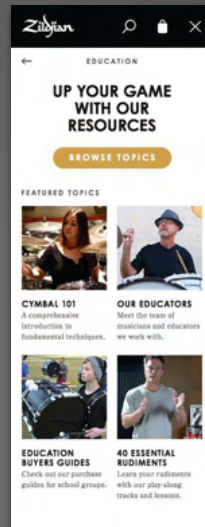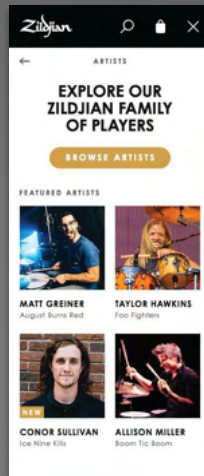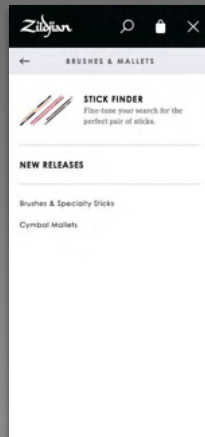

Landing & Detail (320)

Zildjian

"Lorem ipsum dolor sit amet consectetur"

ARTIST NAME →
Band Name

< Artists

In 2002 at the age of 16, after being in several smaller bands, Ben got some friends together to start a band who were to become the most formidable force Australian heavy music had ever seen - Parkway Drive.

Follow [Artist First Name]

Find an Artist...

25 Artists   FILTER

Highlighted ✕   Clear All

ARTIST NAME
Band Name

ARTIST NAME
Band Name   NEW

ARTIST NAME
Band Name

ARTIST NAME
Band Name

ARTIST NAME
Band Name

NEW
ARTIST NAME
Band Name

ARTIST NAME
Band Name

Zildjian

ARTIST NAME
Band Name

This paragraph will then follow the hero promo.

[ARTIST FIRST NAME]'S SETUP

1. Product Name
2. Product Name
3. Product Name
4. Product Name
5. Product Name
6. Product Name
7. Product Name
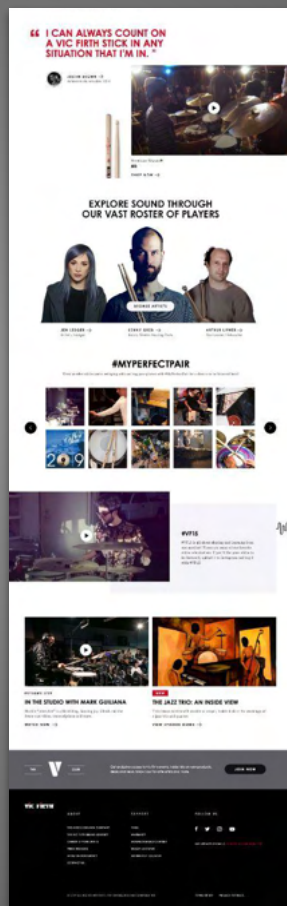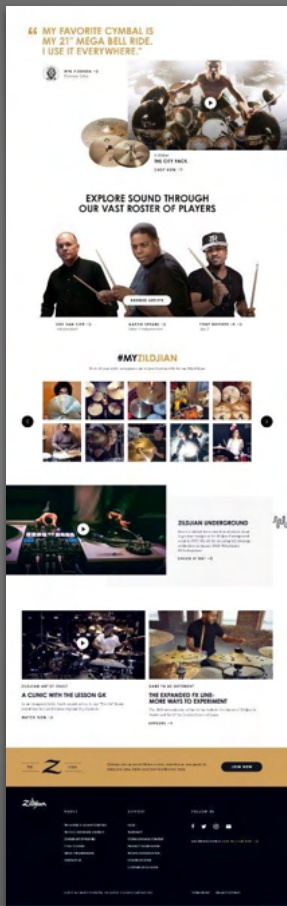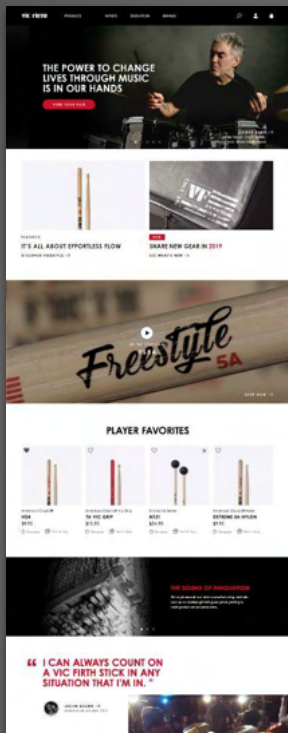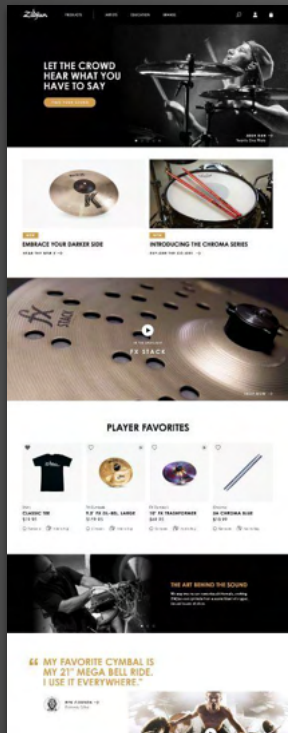
[ARTIST FIRST NAME]'S GO-TO'S

This page illustrates how the Artist Landing/Gallery page and the Artist Detail page will be adapting to mobile screens between 320px and 767px wide. In general, interaction details and functionality stays the same as the desktop version, except when noted on this page.

1. MOBILE NAVIGATION
Mobile pages always start with the mobile navigation. See Navigation section for design details and functionality information for this element.

2. HERO IMAGE
this hero image scales down and gets crop on mobile layouts. See the visual design playbook for exact specifications on how the image gets crop.

3. HERO HEADER
The header with the artist name and band name will then sit towards the bottom of the hero image and both will be center justified.

4. ARTIST BIO COPY
This paragraph will then follow the hero promo.

5. SOCIAL LINKS
The artist's Social Links will then be stacked beneath the Artists Bio. this element will stack its header on top and social icons will sit underneath centered on the page. See the visual design playbook for specifications on spacing and padding between these elements.

6. ARTIST'S SET-UP
This image on this section will scaled down and maintain its ratio and go full content width. The Header and Produc List mapping the cymbals on the image will then stacked underneath the image.

7. ARTIST'S GO-TO'S MODULE
For this module, when there are more than one product tiles present, then the carousel gets this treatment shown. One full tile shows on the left while the second to the right goes beyond the screen to indicate that there are more tiles on the carousel. Users can then swipe left to reveal the reamining tiles on the carousel. Different from Desktop, this carousel on mobile stops at both ends and does not cycle through as the user interacts with it. All other features and elements within this module stay the same as desktop.

8. Q&A MODULE
On mobile, this module stacks by placing the profile image on top then the Q&A copy beneath it. For image cropping/scaling see the visual design playbook for more details.

9. BEHIND THE KIT
On mobile, this module centers its header and then stacks each image/video unit in a single column. Each image/video assets mantains its ratio and takes up full content width.

10. VIDEO PLAYER
Different from Desktop, on mobile screens when the user clicks on a video asset (YouTube embed), a full-screen video player overlay takes over. All other functionality for the elements within this module stay the same as desktop.

11. OTHER ARTISTS MODULES
On mobile, the links for each artist get stacked to form a single column. All the tiles are left justified to the content area. Functionality stays the same as desktop.

12. HERO PROMO
On mobile, the image within this hero promo scales down and gets cropped, but still full-width on the screen. The header copy and artist information sits at the bottom of the hero area.

See the visual design playbook for more details on spacing and padding.

13. CAROUSEL CONTROLS
These control stay centered and towards the bottom of this promo area. Functionality stays the same as in the desktop version.

We created a powerful ecommerce experience that's in tune with musicians no matter where they are in their lifelong journey.

A Cohesive Brand Platform

3 Merged three distinct brands into a single unified brand commerce platform

Increased Page Views

41% 41% increase in average number of unique pages viewed during each visit

Increased Engagement

41s Visitors spend 41 seconds more time on average on the site during each visit

Additional Work

In addition to my featured case studies, here are additional work examples – excerpted directly from delivered materials – that further showcase my skills, abilities and experience.

Enterprise
Rapid Service Design Sprint

Intel
Interactive POS Experience Concept

Enterprise

Rapid Service Design Sprint

Top Customer Pain Points:

1. **Navigating to remote branches (e.g., airport shuttle)**

2. Unclear range and wait for for *We'll Pick You Up*

3. Inconvenient branch hours

4. Waiting for the employee to inspect the vehicle

MAKING IT REAL

Our process in action

MON	TUE	WED	THU

Service Safari **Service Blueprinting** **Prototyping** **Analyze Results**

Ideation **Concept Testing**

Plan for Testing
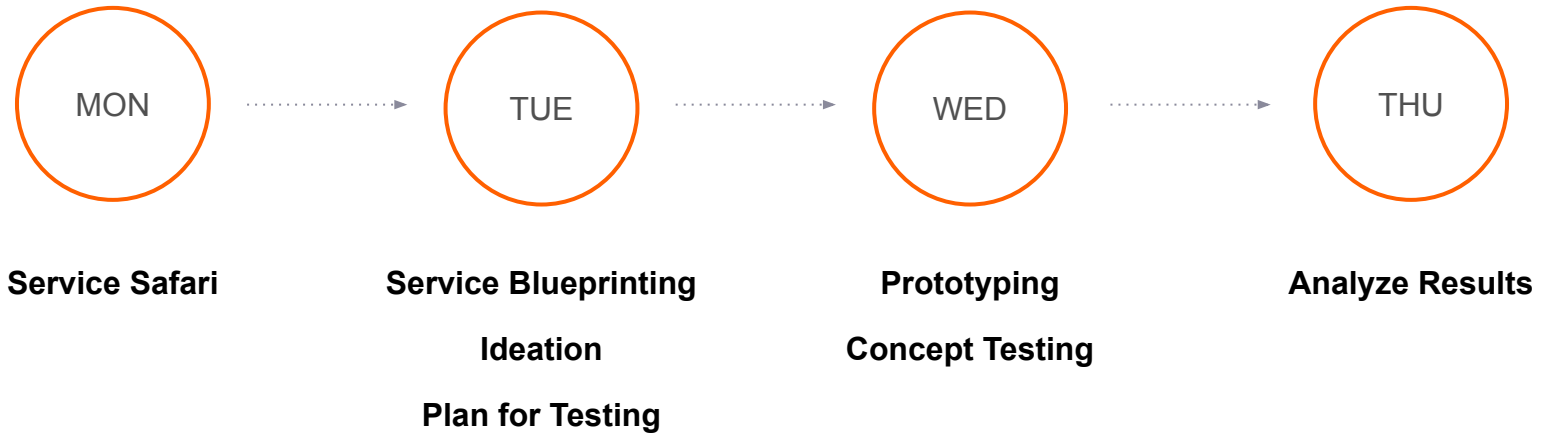
Service Safari

Home City, Airport, owned shuttles and combined, we consumed prior journey work and lived it for ourselves in a variety of scenarios.
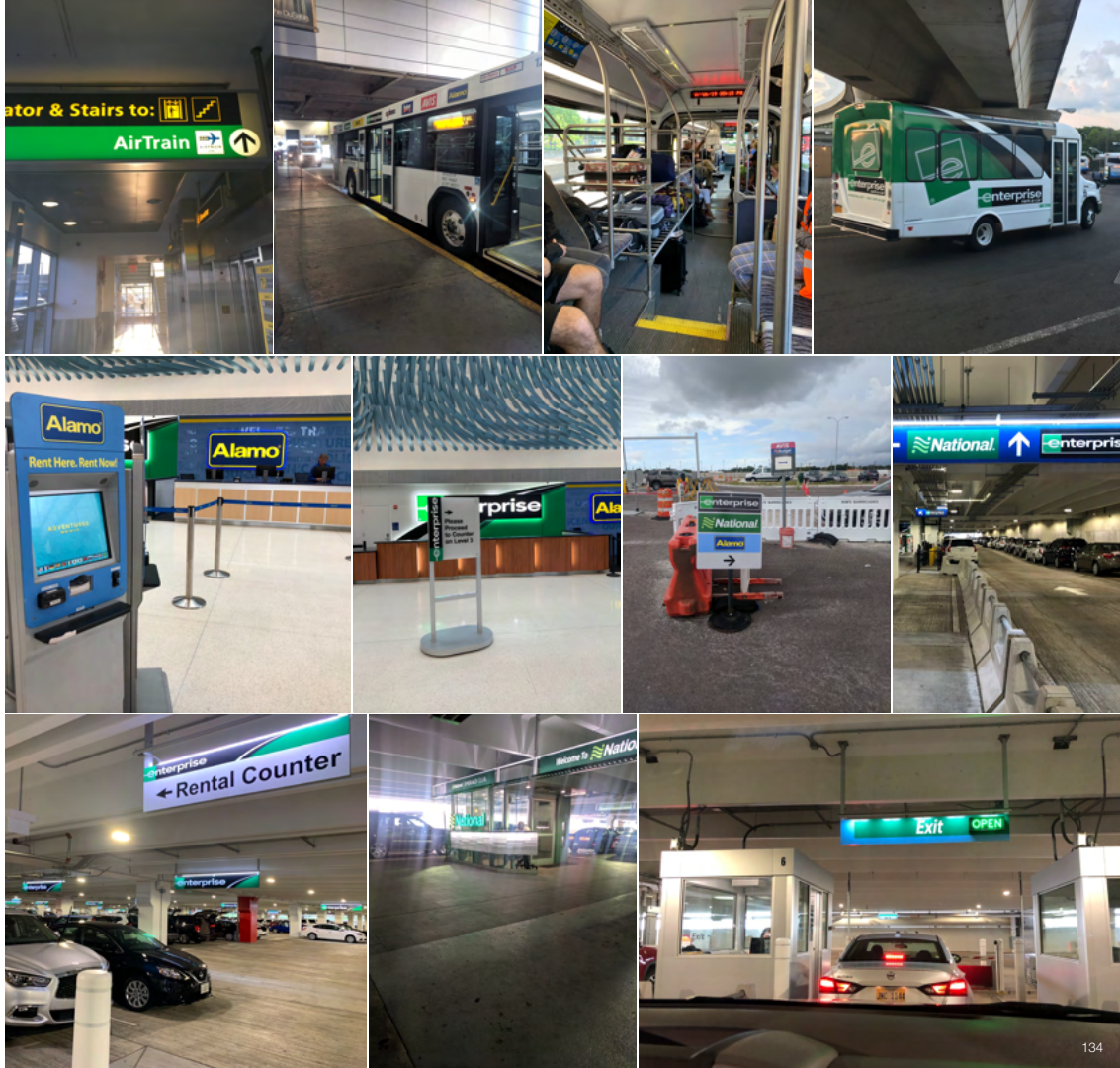
NAVIGATING TO REMOTE BRANCHES

The high level journey looks like this:

Getting to Rental Location

**Deplane & Walk to
Baggage Area/Exit**

**Look for signs
to rental car area**

Go to rental car area
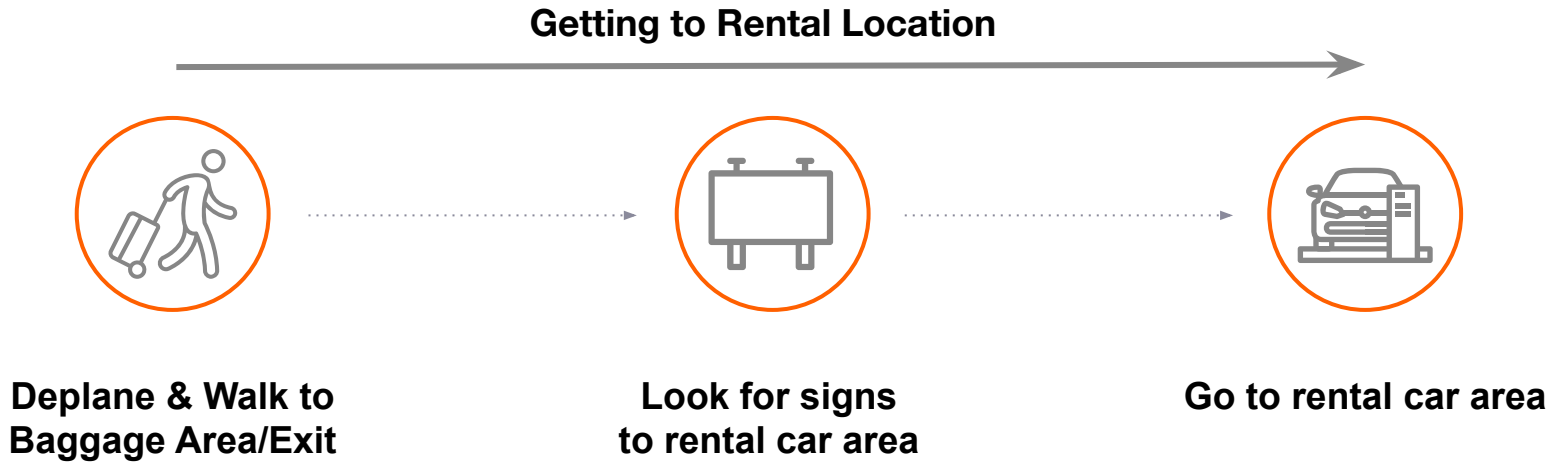
NAVIGATING TO REMOTE BRANCHES

However, the true journey is varied and complex:
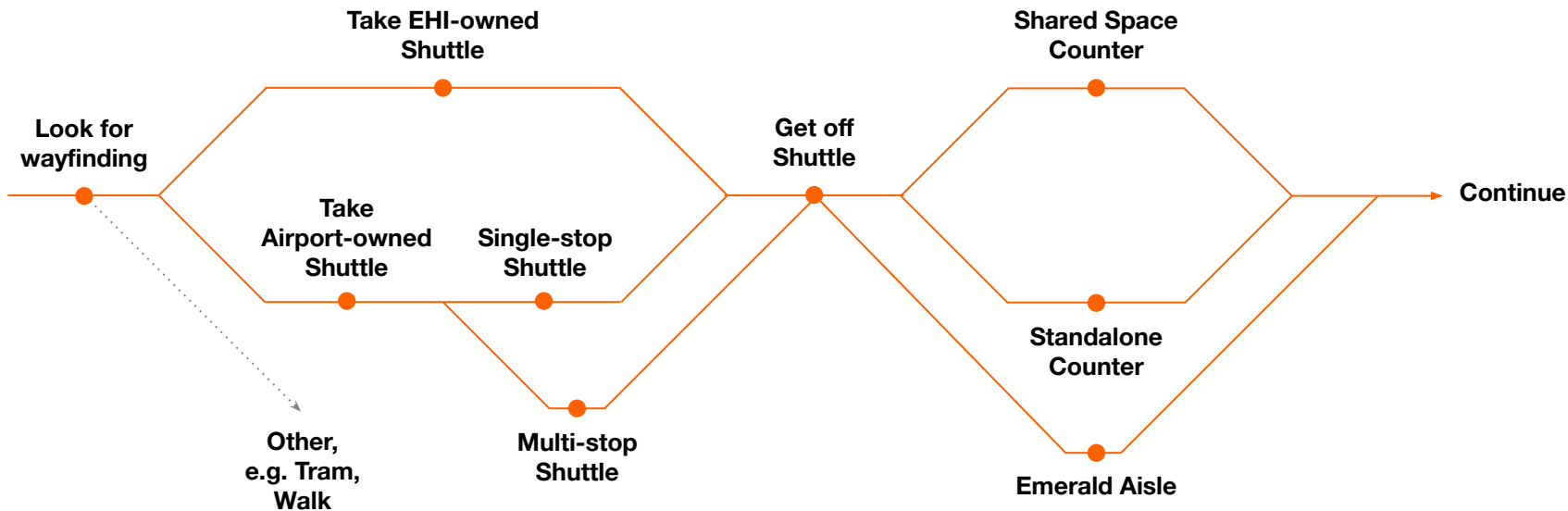
SERVICE EVENTS: NAVIGATING TO REMOTE BRANCHES

**NAVIGATING TO
REMOTE BRANCHES**

Moment in Journey

**Service
Event
Blueprint**

**Take EHI-owned Shuttle
to EHI Rental Counter**

**Take Airport Owned Shuttle
To Airport Rental Center**

**Airport-owned Shuttle
to EHI-owned Shuttle**

**National
Emerald Aisle**
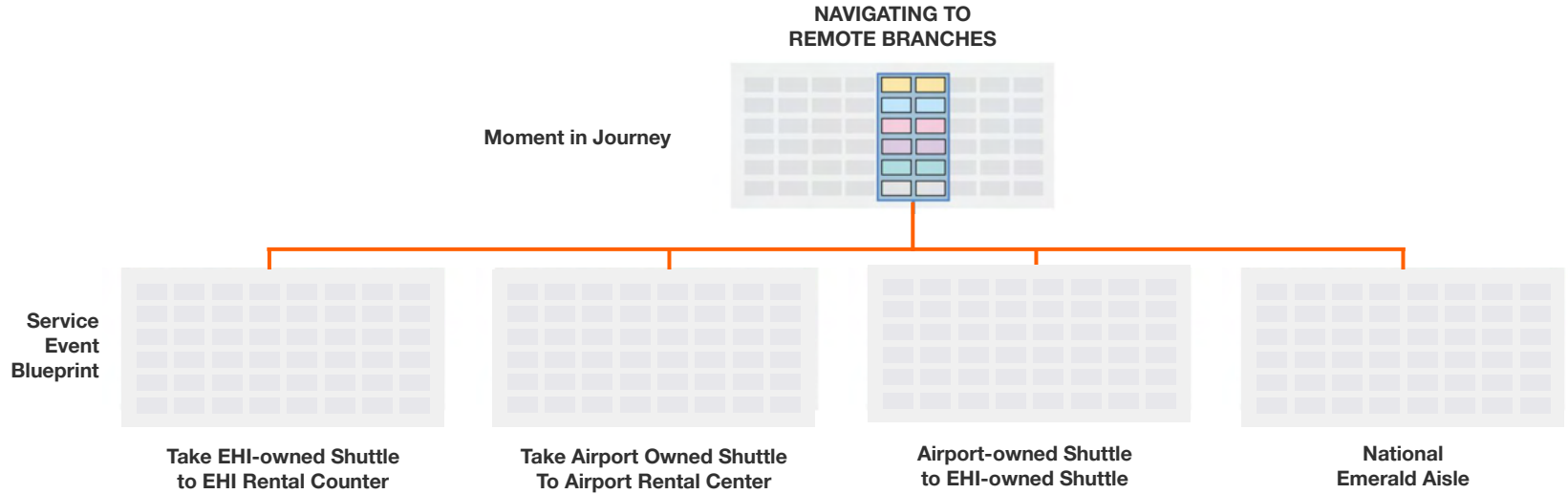
FOCUS: DEPLANING TO EXITING THE ENTERPRISE SHUTTLE

Current State Service Event Blueprint

You see lots of **blank space** here because customer support is currently limited during these stages of the journey.

	Deplane & Go To Shuttle Pickup				Wait for Shuttle	Takes Shuttle		
CUSTOMER ACTION	Looks for direction to shuttle	Exits Secure Area	Claims Baggage	Looks for Shuttle Pickup Area	Looks for Shuttle	Exits Secure Area	Claims Baggage	Looks for Shuttle Pickup Area
EMOTIONAL JOURNEY	I don't know how to get there / I'm not sure how long it will take / I hope cars are still available when I arrive				I'm not sure where to stand / What does the shuttle looks like / I'm not sure how long I have to wait / I hope I'm not waiting too long at the counter / I hope I can get some assistance with my baggage	I don't know how long the ride will take / I hope I'm not waiting too long at the counter / I hope I can get some assistance with my baggage		

— Line of Interaction —

App	Basic Directions	
Web	Basic Directions	
E-Mail		
SMS		
Signage	Airport Wayfinding	Shuttle Location
Employee		
Driver		Baggage Handling	Guidance, Baggage Handling

— Line of Visibility —

Backstage
- Operations
- Customer Support

Support Process
- Data
- Systems
- Business Process
- Partner Activity

FOCUS: DEPLANING TO EXITING THE ENTERPRISE SHUTTLE

Future State Service Event Blueprint

During Service Event Blueprinting workshops, we explore channel opportunities in order to identify potential solution areas.

		Deplane & Go To Shuttle Pickup				Wait for Shuttle	Takes Shuttle		
CUSTOMER ACTION		Looks for direction to shuttle	Exits Secure Area	Claims Baggage	Looks for Shuttle Pickup Area	Looks for Shuttle	Exits Secure Area	Claims Baggage	Looks for Shuttle Pickup Area
EMOTIONAL JOURNEY		I don't know how to get there / I'm not sure how long it will take / I hope cars are still available when I arrive				I'm not sure where to stand / What does the shuttle looks like / I'm not sure how long I have to wait / I hope I'm not waiting too long at the counter / I hope I can get some assistance with my baggage	I don't know how long the ride will take / I hope I'm not waiting too long at the counter / I hope I can get some assistance with my baggage		

— Line of Interaction —

App		Current Directions & Interactive Map / Shuttle Photo / Shuttle/Counter Wait Times & Vehicle Availability / Upgrade Offers Upon Delay / Guidance to SMS Wait Times				Shuttle/Counter Wait Times & Vehicle Availability	Shuttle Route & Arrival Time / Vehicle Selection / Next Steps for Rental Branch / Local Attractions		
Web									
E-Mail						Guidance to SMS Wait Times			
SMS		Shuttle/Counter Wait Times				Shuttle/Counter Wait Times			
Signage		Airport Wayfinding, Guidance to SMS Waits Times				Shuttle Photo & Location / Guidance to SMS Wait Times	Shuttle Route & Arrival Time, Next Steps for Rental Branch, Local Attractions		
Employee						Customer Check-In & Assistance / Shuttle/Counter Wait Times	Customer Reception / View of Incoming Customer Flow		
Driver						Baggage Handling	Customer Guidance / Baggage Handling		

— Line of Visibility —

Backstage									
	Operations								
	Customer Support								
Support Process	Data								
	Systems								
	Business Process								
	Partner Activity								

Improving the Airport Rental Wayfinding Journey

STAGE 1

Deplane and go to Shuttle Pickup

Current Customer Challenges

Deplane and go to Shuttle Pickup
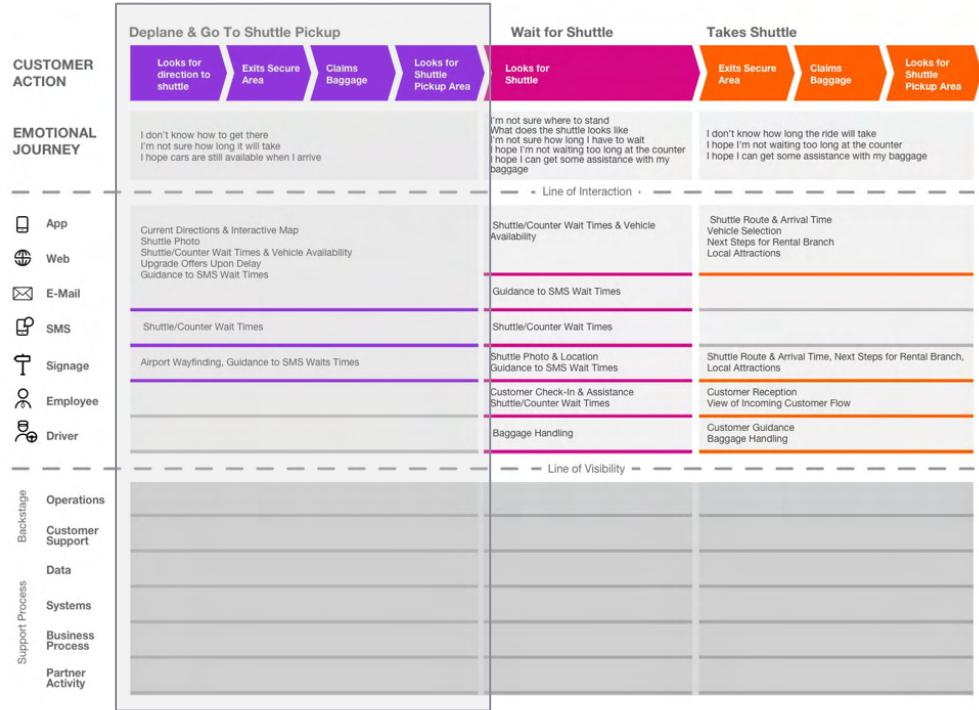
Key Challenges:

- "I don't know how to get there and whether I need to take transportation"
- "I'm not sure how long it will take"
- "I hope cars are still available when I arrive" (non-reservation customer)

Guiding Principles:

- Set expectations
- Be transparent
- Provide clear, timely instructions
- Make it easy to get help

Your Next Steps Upon Arrival
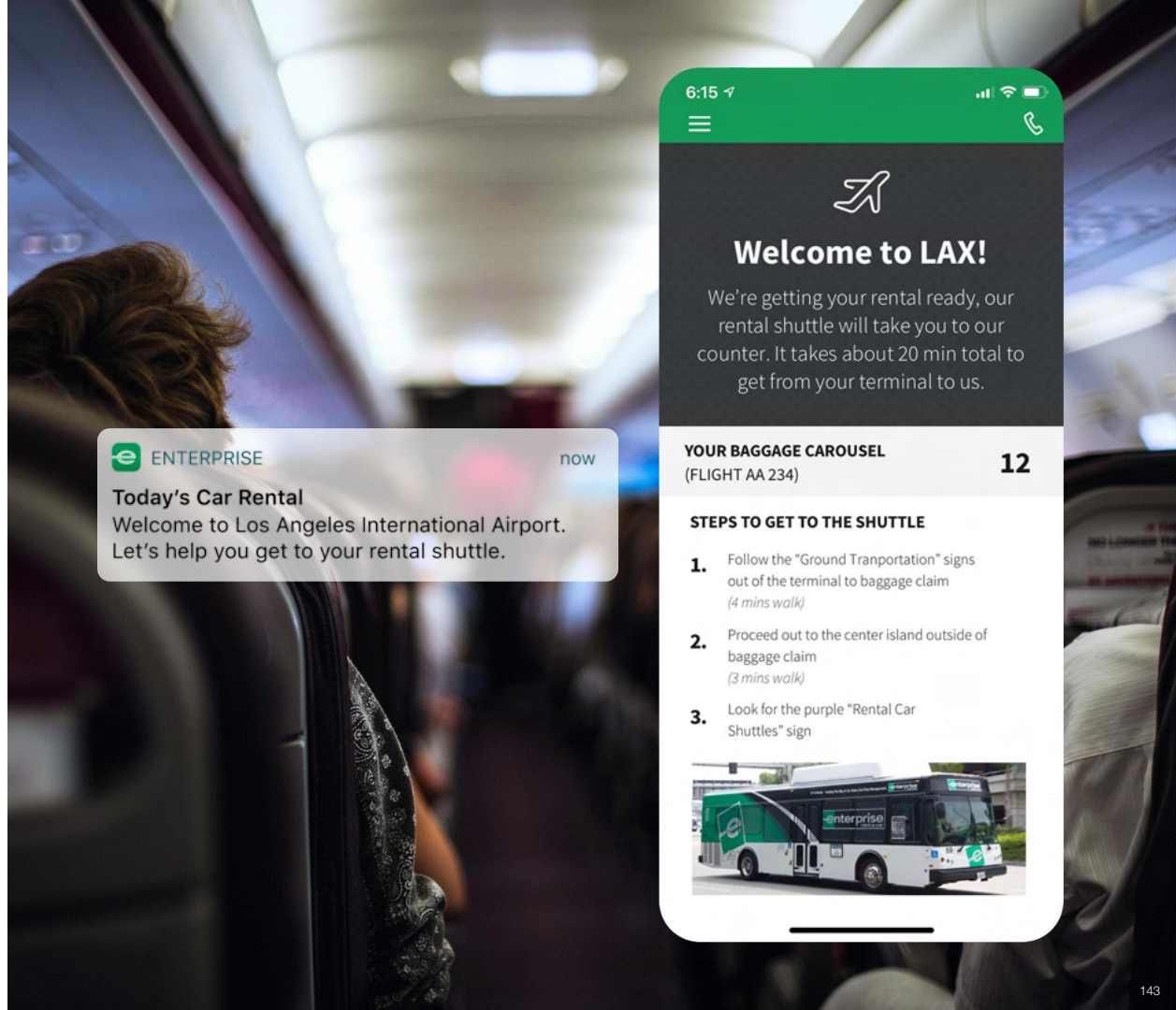
Deplane and go to Shuttle Pickup

ENTERPRISE   now

Today's Car Rental
Welcome to Los Angeles International Airport.
Let's help you get to your rental shuttle.

6:15

✈
Welcome to LAX!

We're getting your rental ready, our rental shuttle will take you to our counter. It takes about 20 min total to get from your terminal to us.

YOUR BAGGAGE CAROUSEL   **12**
(FLIGHT AA 234)

STEPS TO GET TO THE SHUTTLE

1. Follow the "Ground Tranportation" signs out of the terminal to baggage claim
   (4 mins walk)

2. Proceed out to the center island outside of baggage claim
   (3 mins walk)

3. Look for the purple "Rental Car Shuttles" sign

Your Next Steps Upon Arrival
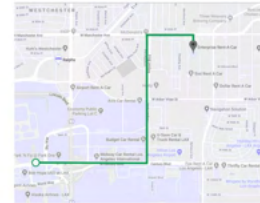
Deplane and go to Shuttle Pickup

A Simple Thanks for Your Patience

Deplane and go to Shuttle Pickup
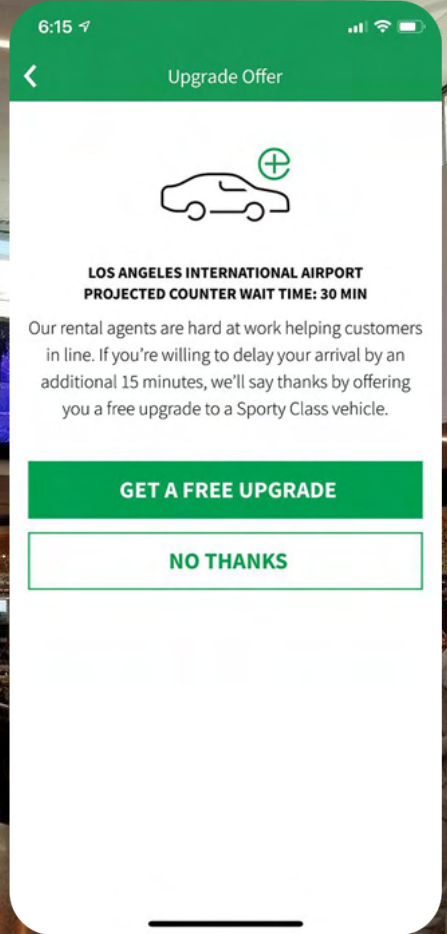
STAGE 2

Wait for the Shuttle

Current Customer Challenges

Wait for Shuttle

CUSTOMER ACTION

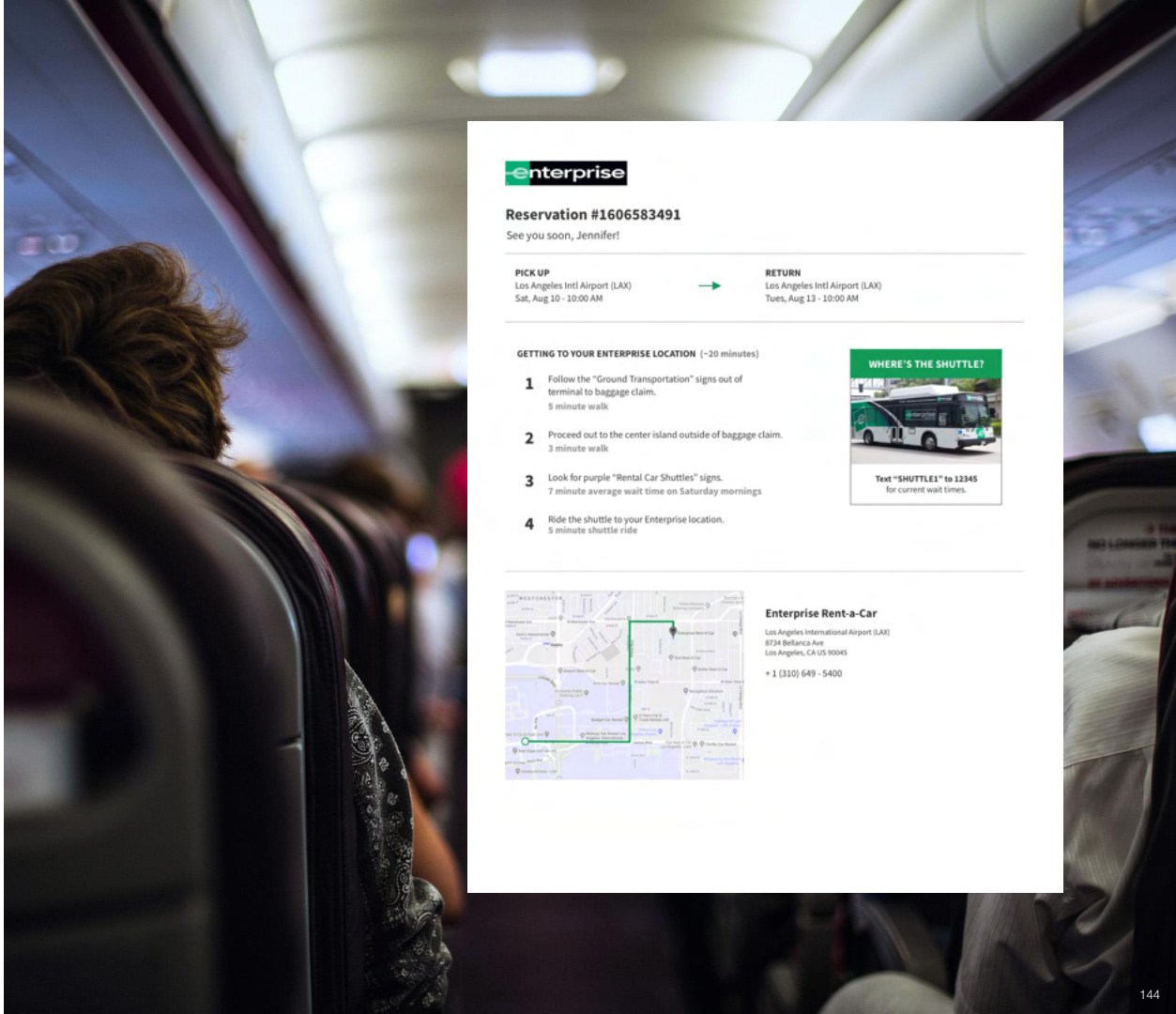| Deplane & Go To Shuttle Pickup	Wait for Shuttle	Takes Shuttle
Looks for direction to shuttle · Exits Secure Area · Claims Baggage · Looks for Shuttle Pickup Area	Looks for Shuttle	Exits Secure Area · Claims Baggage · Looks for Shuttle Pickup Area

EMOTIONAL JOURNEY

I don't know how to get there I'm not sure how long it will take I hope cars are still available when I arrive	I'm not sure where to stand What does the shuttle looks like I'm not sure how long I have to wait I hope I'm not waiting too long at the counter I hope I can get some assistance with my baggage	I don't know how long the ride will take I hope I'm not waiting too long at the counter I hope I can get some assistance with my baggage

— Line of Interaction ·

	Deplane & Go To Shuttle Pickup	Wait for Shuttle	Takes Shuttle
App	Current Directions & Interactive Map Shuttle Photo Shuttle/Counter Wait Times & Vehicle Availability Upgrade Offers Upon Delay Guidance to SMS Wait Times	Shuttle/Counter Wait Times & Vehicle Availability	Shuttle Route & Arrival Time Vehicle Selection Next Steps for Rental Branch Local Attractions
Web			
E-Mail		Guidance to SMS Wait Times	
SMS	Shuttle/Counter Wait Times	Shuttle/Counter Wait Times	
Signage	Airport Wayfinding, Guidance to SMS Waits Times	Shuttle Photo & Location Guidance to SMS Wait Times	Shuttle Route & Arrival Time, Next Steps for Rental Branch, Local Attractions
Employee		Customer Check-In & Assistance Shuttle/Counter Wait Times	Customer Reception View of Incoming Customer Flow
Driver		Baggage Handling	Customer Guidance Baggage Handling

— Line of Visibility —

Backstage
- Operations
- Customer Support

Support Process
- Data
- Systems
- Business Process
- Partner Activity

Key Challenges:

- "I'm not sure how long I have to wait"
- "I'm not sure where I'm supposed to stand"
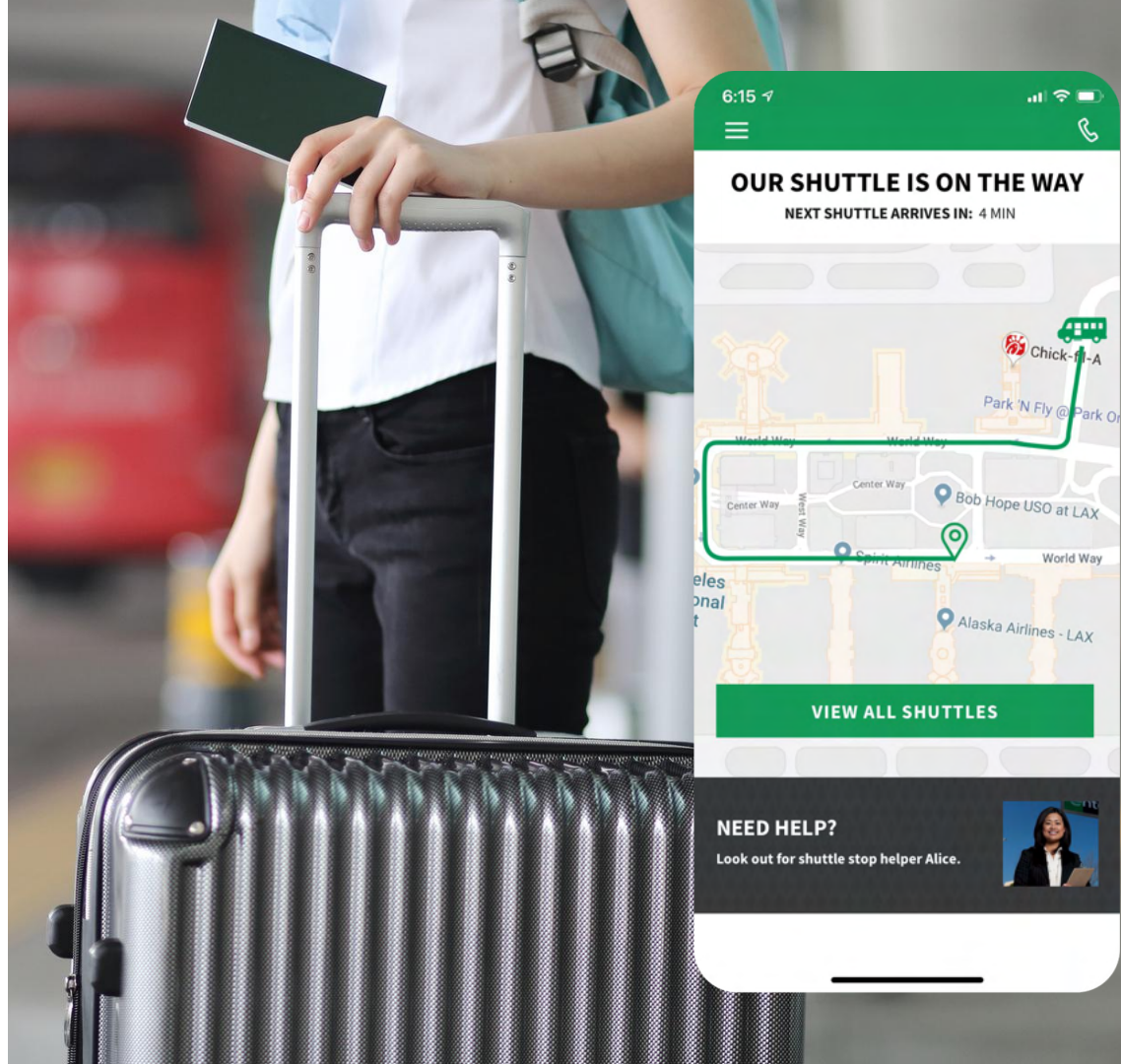- "I hope I can get some assistance with my luggage"

Guiding Principles:

- Set expectations
- Anticipate needs
- Provide clear guidance
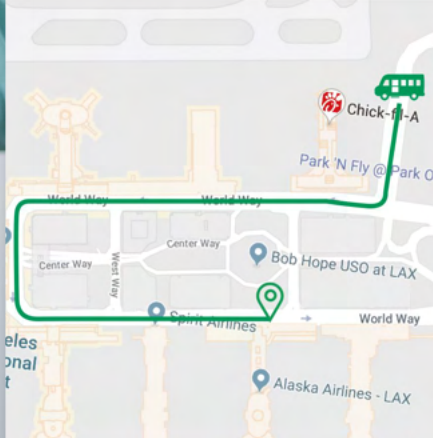
Enterprise
Leads the Way

Wait for Shuttle

OUR SHUTTLE IS ON THE WAY

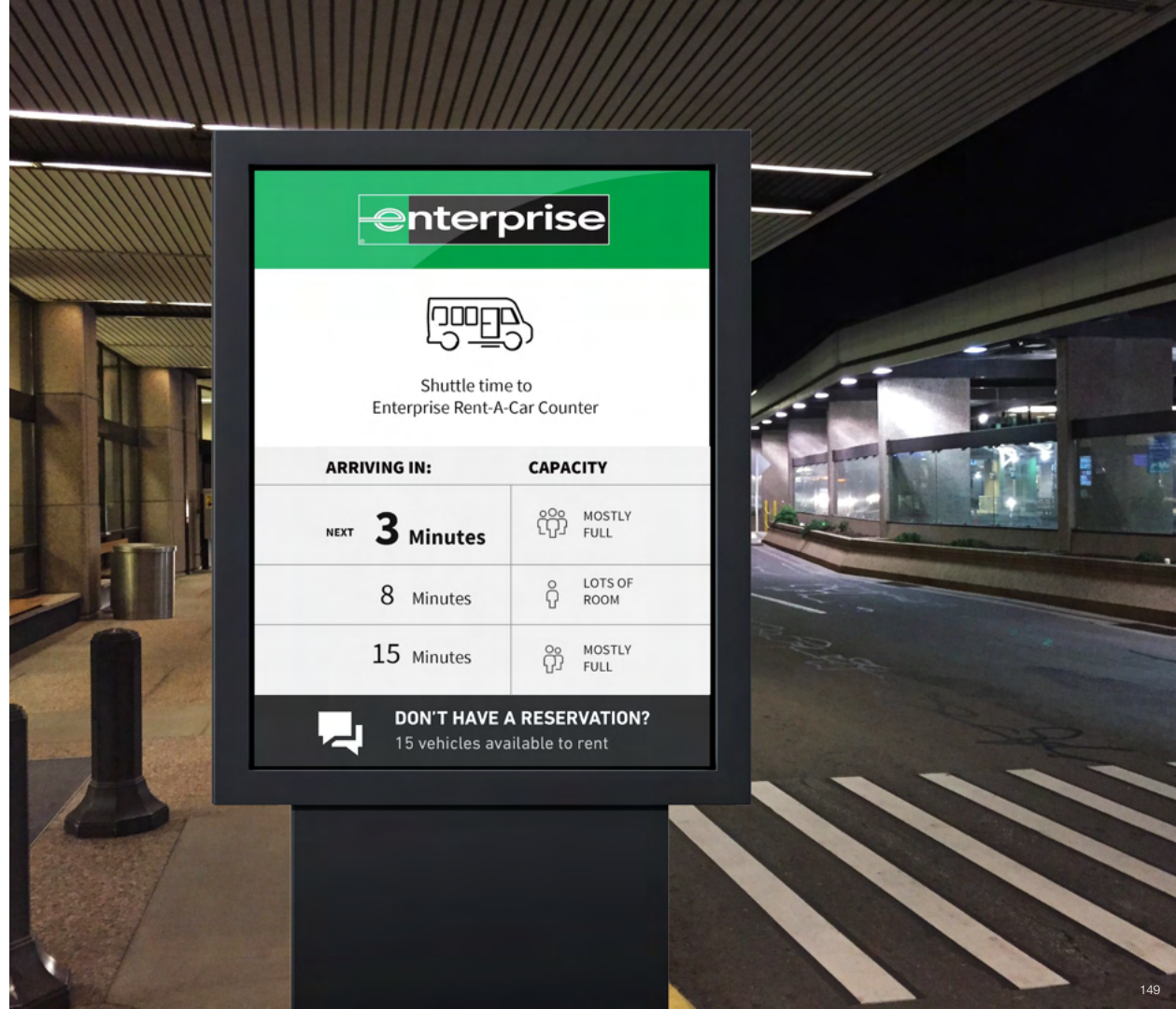NEXT SHUTTLE ARRIVES IN: 4 MIN

VIEW ALL SHUTTLES

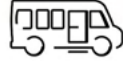**NEED HELP?**
Look out for shuttle stop helper Alice.

Enterprise
Leads the Way

Wait for Shuttle

Enterprise
Leads the Way

Wait for Shuttle

Enterprise
Leads the Way

Wait for Shuttle

STAGE 3

Take the Shuttle

Current Customer Challenges

Take the Shuttle

Deplane & Go To Shuttle Pickup / Wait for Shuttle / Takes Shuttle customer journey map

CUSTOMER ACTION
- Looks for direction to shuttle
- Exits Secure Area
- Claims Baggage
- Looks for Shuttle Pickup Area
- Looks for Shuttle
- Exits Secure Area
- Claims Baggage
- Looks for Shuttle Pickup Area

EMOTIONAL JOURNEY
- I don't know how to get there / I'm not sure how long it will take / I hope cars are still available when I arrive
- I'm not sure where to stand / What does the shuttle looks like / I'm not sure how long I have to wait / I hope I'm not waiting too long at the counter / I hope I can get some assistance with my baggage
- I don't know how long the ride will take / I hope I'm not waiting too long at the counter / I hope I can get some assistance with my baggage

Line of Interaction

App
- Current Directions & Interactive Map, Shuttle Photo, Shuttle/Counter Wait Times & Vehicle Availability, Upgrade Offers Upon Delay, Guidance to SMS Wait Times
- Shuttle/Counter Wait Times & Vehicle Availability
- Shuttle Route & Arrival Time, Vehicle Selection, Next Steps for Rental Branch, Local Attractions

Web

E-Mail
- Guidance to SMS Wait Times

SMS
- Shuttle/Counter Wait Times
- Shuttle/Counter Wait Times

Signage
- Airport Wayfinding, Guidance to SMS Waits Times
- Shuttle Photo & Location, Guidance to SMS Wait Times
- Shuttle Route & Arrival Time, Next Steps for Rental Branch, Local Attractions

Employee
- Customer Check-In & Assistance, Shuttle/Counter Wait Times
- Customer Reception, View of Incoming Customer Flow

Driver
- Baggage Handling
- Customer Guidance, Baggage Handling

Line of Visibility

Backstage: Operations, Customer Support
Support Process: Data, Systems, Business Process, Partner Activity

Key Challenges:

- "I don't know how long the ride will take"
- "I hope I'm not waiting too long at the counter"
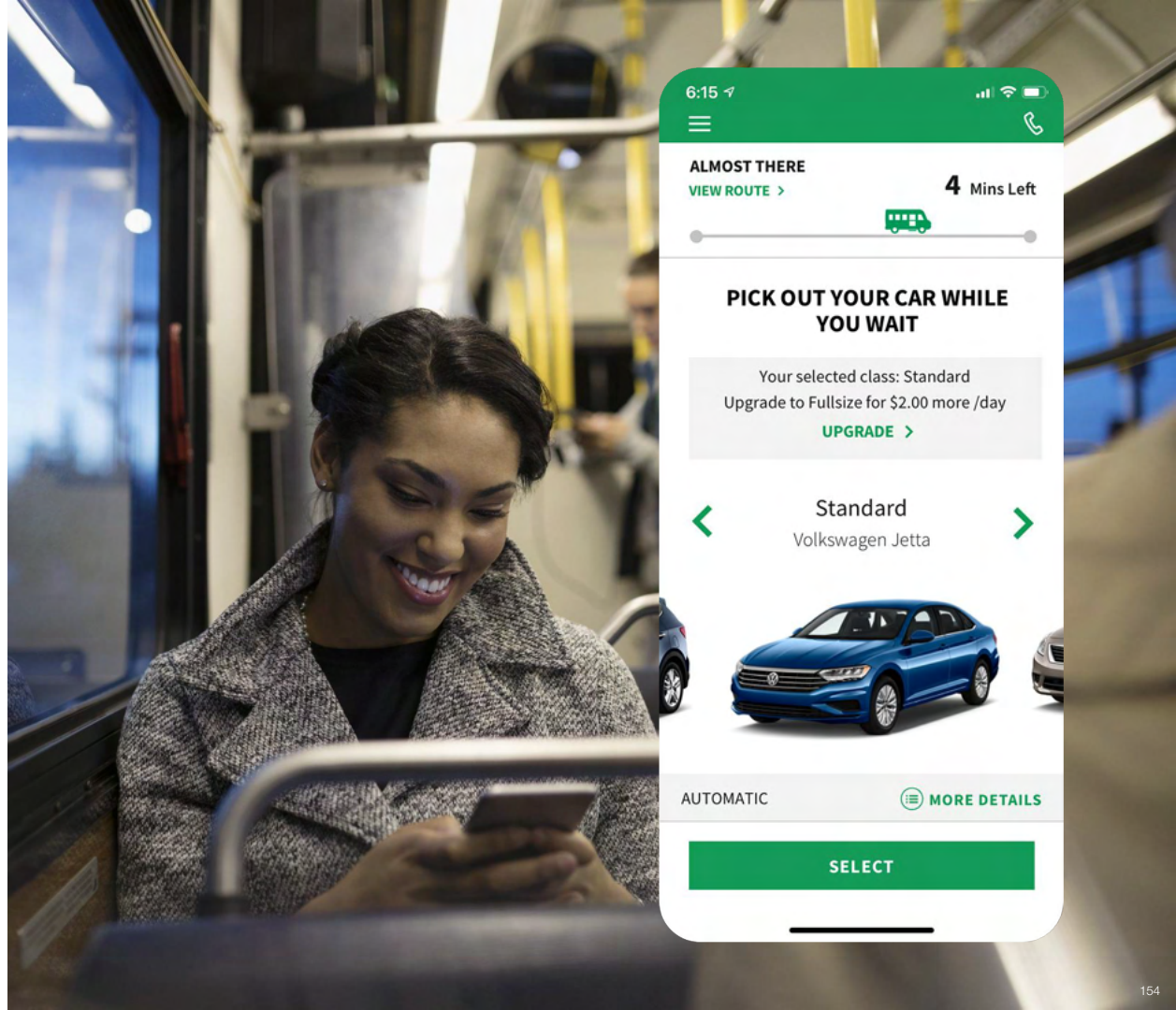- "I hope I can get some assistance with my baggage"

Guiding Principles:

- Set expectations
- Be transparent
- Distract with time-saving activities
- Personalize whenever possible
- Provide a consistent experience

One Step Ahead

Take the Shuttle

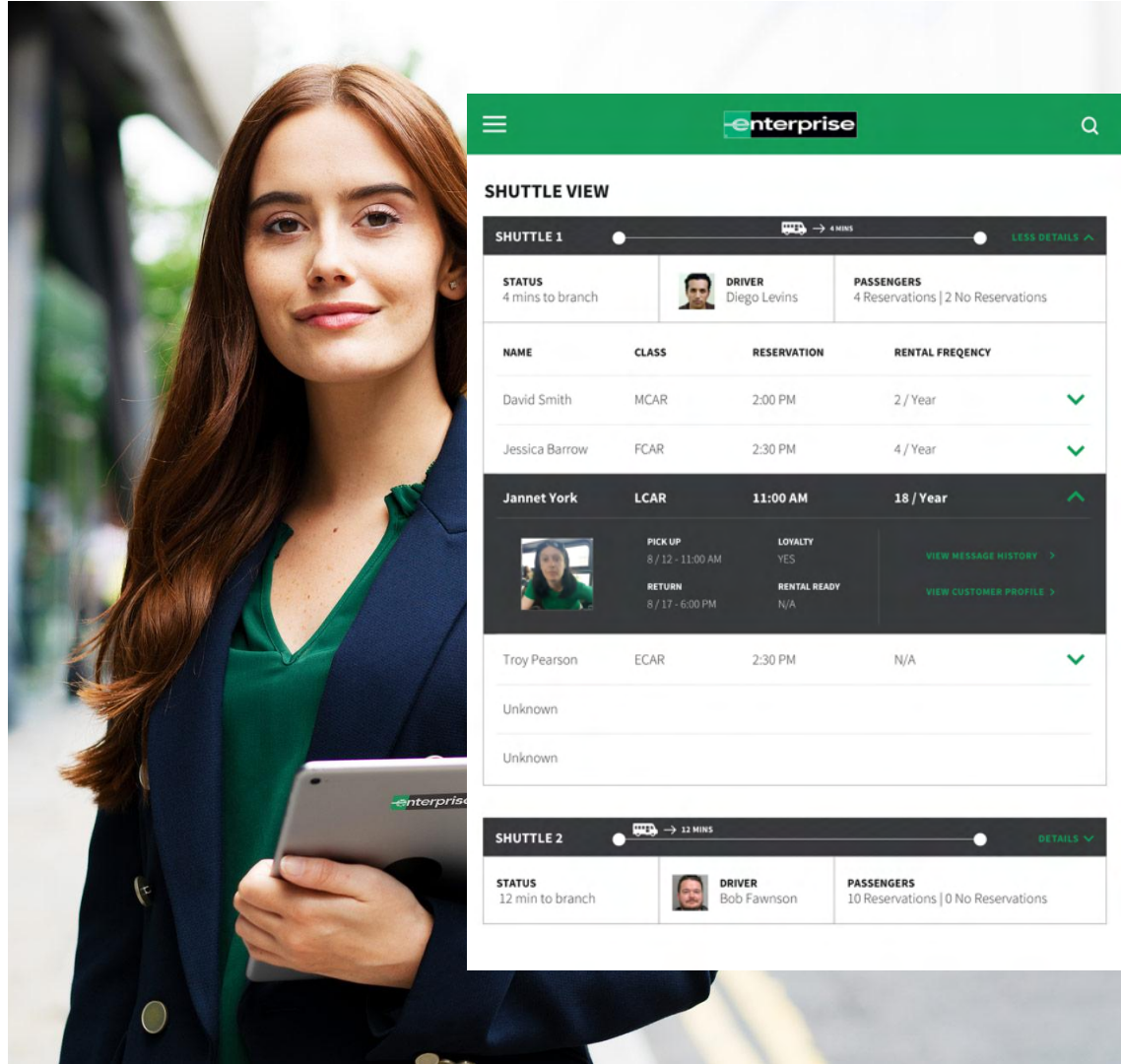## Clear Next Steps
and a Fun Distraction

Take the Shuttle
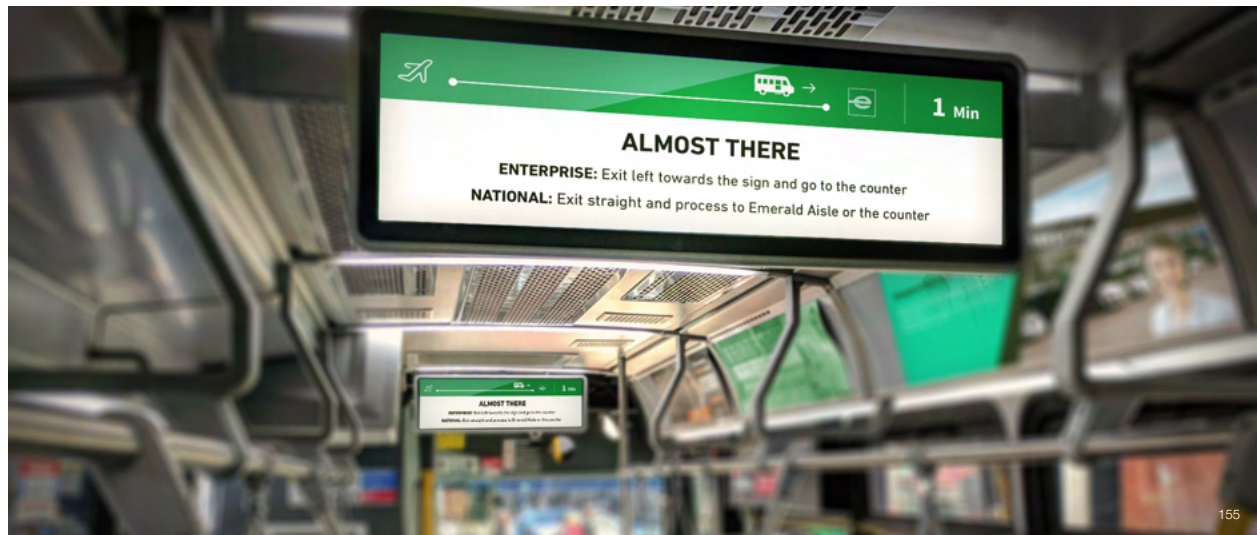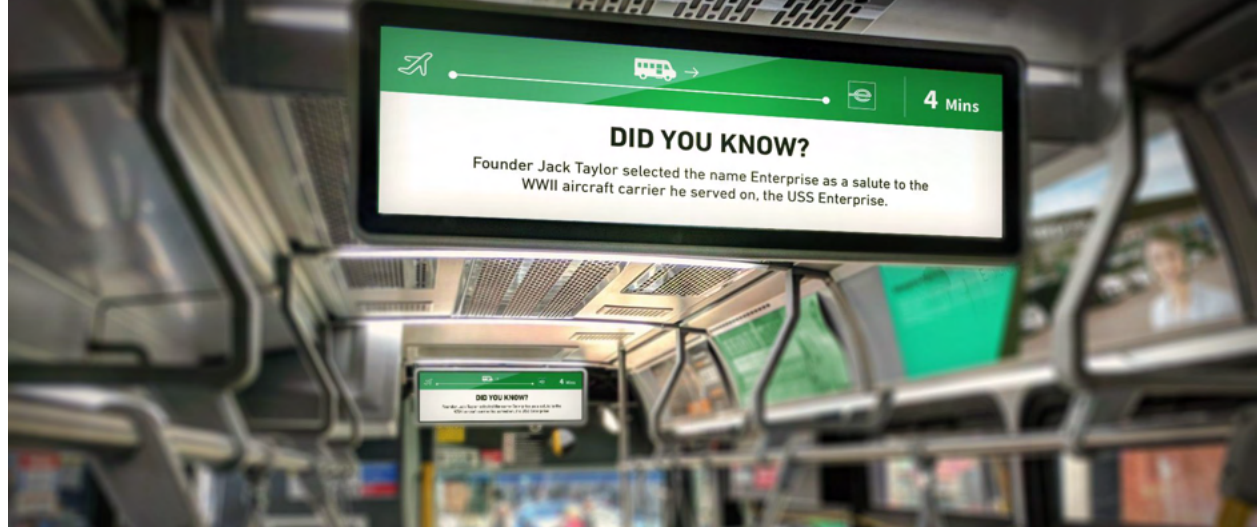
A Personalized
Greeting Upon Arrival

Take the Shuttle

SHUTTLE VIEW

SHUTTLE 1 → 4 MINS LESS DETAILS ^

STATUS	DRIVER	PASSENGERS
4 mins to branch	Diego Levins	4 Reservations | 2 No Reservations

NAME	CLASS	RESERVATION	RENTAL FREQENCY	
David Smith	MCAR	2:00 PM	2 / Year	v
Jessica Barrow	FCAR	2:30 PM	4 / Year	v
Jannet York	**LCAR**	**11:00 AM**	**18 / Year**	^

PICK UP	LOYALTY	
8 / 12 - 11:00 AM	YES	VIEW MESSAGE HISTORY >
RETURN	RENTAL READY	VIEW CUSTOMER PROFILE >
8 / 17 - 6:00 PM	N/A	

Troy Pearson	ECAR	2:30 PM	N/A	v
Unknown				
Unknown				

SHUTTLE 2 → 12 MINS DETAILS v

STATUS	DRIVER	PASSENGERS
12 min to branch	Bob Fawnson	10 Reservations | 0 No Reservations

Concept Testing

**CONCEPT TESTING
STAGE 2 – WAIT FOR SHUTTLE**

All four concepts generated interest and made customers feel informed.

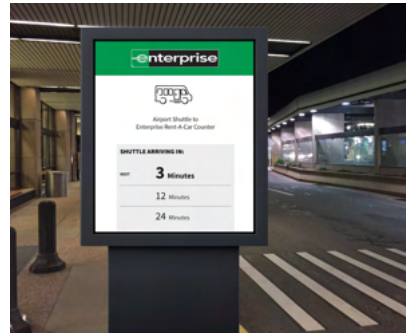| Mobile	Dynamic Sign	Branch Employee	SMS Billboard

Mobile
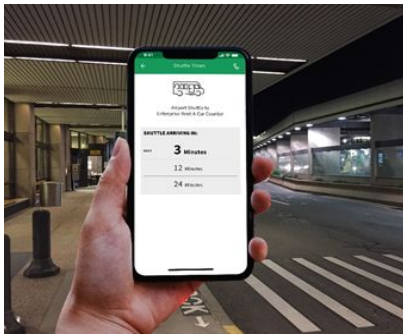
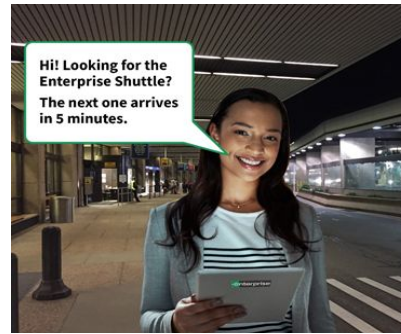Extremely/Very
Interested: **88%**

Informed: **71%**

Dynamic Sign

Extremely/Very
Interested: **92%**

Informed: **79%**

Branch Employee

Extremely/Very
Interested: **79%**
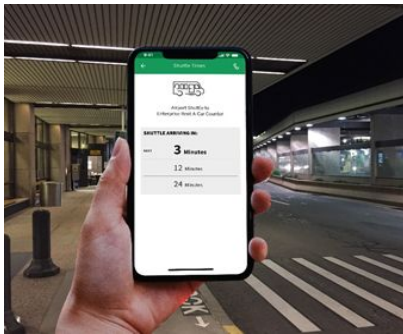
Informed: **61%**

SMS Billboard

Extremely/Very
Interested: **82%**

Informed: **63%**

CONCEPT TESTING
STAGE 2 – WAIT FOR SHUTTLE

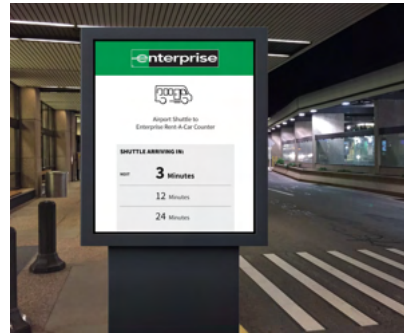# But some stood out for different reasons that help guide our path forward.

Mobile	Dynamic Sign	Branch Employee	SMS Billboard

20% preference

49% preference

22% preference

9% preference

Emotional Takeaways:
Calm & Connected
Frustration-Relief
Anxiety Reduction

Emotional Takeaways:
Calm & Connected
Frustration-Relief
Anxiety Reduction

Emotional Takeaways:
Cared For & Respected
Frustration-Relief
Anxiety Reduction

Emotional Takeaways:
Calm & Connected
Empowerment

Intel

Interactive POS Experience Concept

tonyowens@uxarchitect.net | www.tonyowens.net | linkedin.com/in/tonyo | 347.332.3030

Meet the customer

Julie may not be a power user, but she still uses her PC a fair bit.

Mainly, she checks her email, lightly surfs the web, and streams her favorite shows.

Julie also uses her PC to organize family photos and create simple videos to celebrate special moments.

But lately, her PC has been dragging. Julie needs a new one, but she's overwhelmed by the sea of options out there. Julie also finds specs to be a baffling mix of numbers and acronyms.

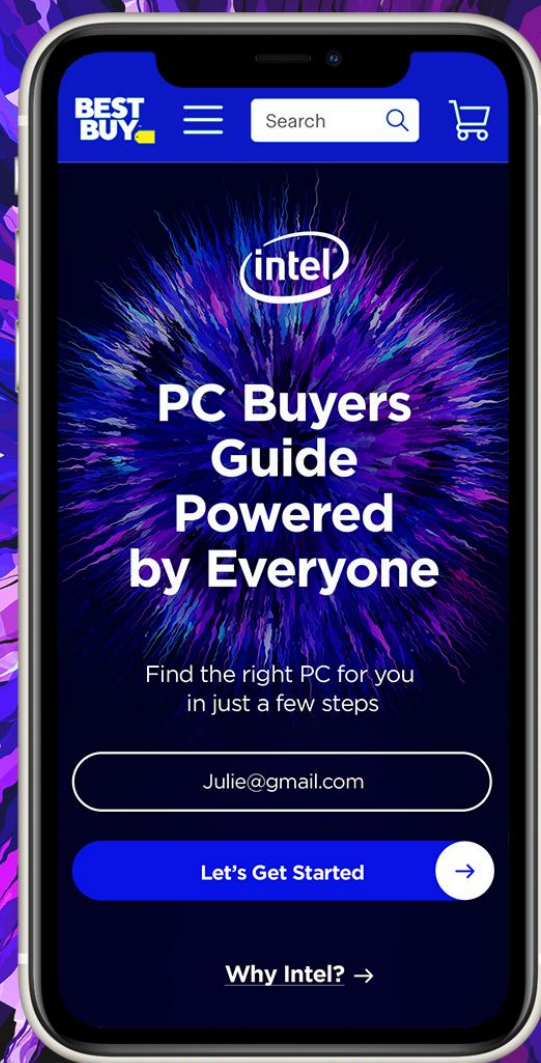**JULIE**
/ 34yo
/ Lancaster, PA
/ Married with kids
/ Enjoys media but not really computer savvy

Her journey starts before the store

Julie first turns to Google for PC buying advice. The search engine returns lots of links, but one result stands out: Intel's PC Buyers Guide.

Julie finds this content appealing because, instead of having to read spec-filled articles and charts, she'll be automatically guided to the PCs perfect for her, based on her computer usage.

Intrigued, she enters her email and initiates the process.

BEST BUY

Search

intel

PC Buyers Guide Powered by Everyone

Find the right PC for you in just a few steps

Julie@gmail.com

Let's Get Started →

Why Intel? →

Inspired, empowered & informed.

Julie's ready to check out the recommended PCs in person.

And she won't even have to ask for help. Using QR technology Julie will be provided personalized information at any IPOS device in the store.

Before she goes, she saves her finalized list as a QR code that she can either print out or save to her phone.
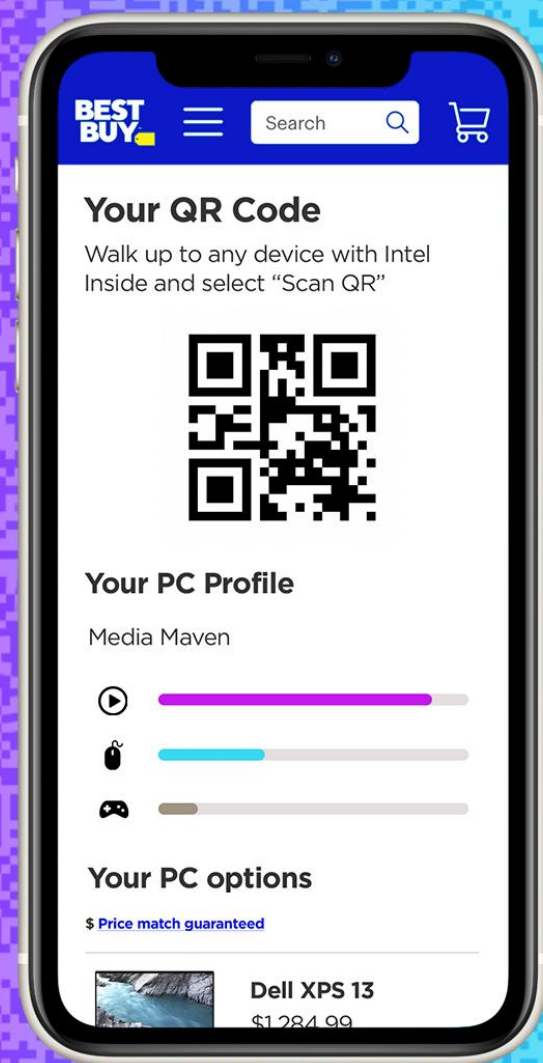
Making the in-store connection

In the store, Julie sees a bewildering mass of Intel-powered laptops.

Each laptop, when in screensaver mode, displays animated messaging and immersive imagery that speaks to the benefits of the device. One that highlights media consuming and creation catches Julie's eye.

As she approaches, the PC's camera sees her. The screen greets Julie with a prompt to 'ring' for a salesperson or to scan her QR code.
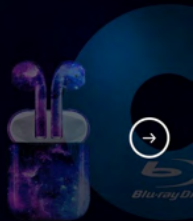
Leading her to the right PC

Julie's personalized guide opens and she can review her PC options at a glance. She can even edit her profile if she wants. More importantly, she can locate the other PCs she wants to check out.

Julie feels relaxed, engaged, excited and inspired. This is the kind of experience that makes her feel confident about her choice.

A personalized shopping experience

Julie is guided to one of the PCs; it's displaying 'Media Maven' benefits on the screen. She sees how this laptop empowers streaming and photo organizing.

The visual design is clean, engaging and navigable. And the language is simple and relevant. She can tap to learn more about the benefits.

If she still feels overwhelmed, she can 'ring' a salesperson over to help; if she's ready to dig in, she can tap Geek Mode for detailed specs.
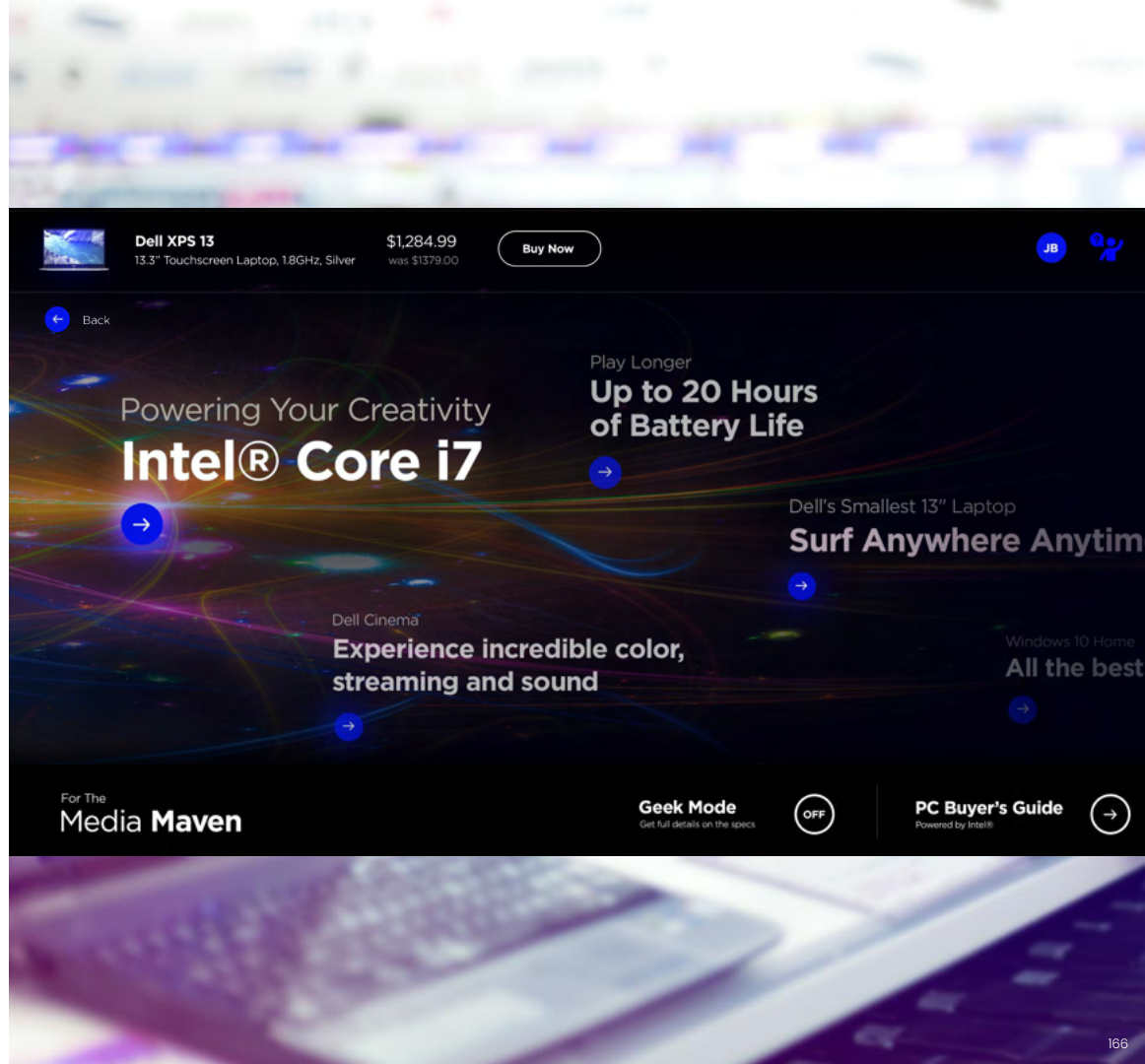
Evaluating
the product

Tapping any of the benefits immerses Julie into different parts of the product story, each as enticing as the next.

The language is both informative and engaging, and helps Julie immediately understands how the features will help her.

Evaluating
the product

As she scrolls down the page, imagery, text and video make it abundantly clear that this PC can help Julie enjoy better graphics, faster image editing and seamless streaming.

Evaluating
the product

Julie can continue to scroll down to learn more about the product in easy-to-understand terms. She can also tap into more details about any of the features and benefits.

As always, the option to buy is present.

Catch her at the moment when she's ready to buy

After undertaking the IPOS journey, Julie comes away with a story of how each option fits into her life and answers her creative needs.

Julie's ready to buy, but scrolls down once more looking for information that'll reassure her that this is the laptop for her.

Dell XPS 13
13.3" Touchscreen Laptop, 1.8GHz, Silver

$1,284.99
was $1379.00

Buy Now

JB

← Back

Bring This Home

Dell XPS 13

13.3" Touchscreen Laptop, 1.8GHz, Silver

$1,284.99
was $1379.00

Check Out

A sales agent will be with you momentarily

For The
Media **Maven**

Geek Mode
Get full details on the specs

OFF

PC Buyer's Guide
Powered by Intel®

Catch her at the moment when she's ready to buy

Immersive screens remind Julie just how perfect this PC is for Media Mavens.

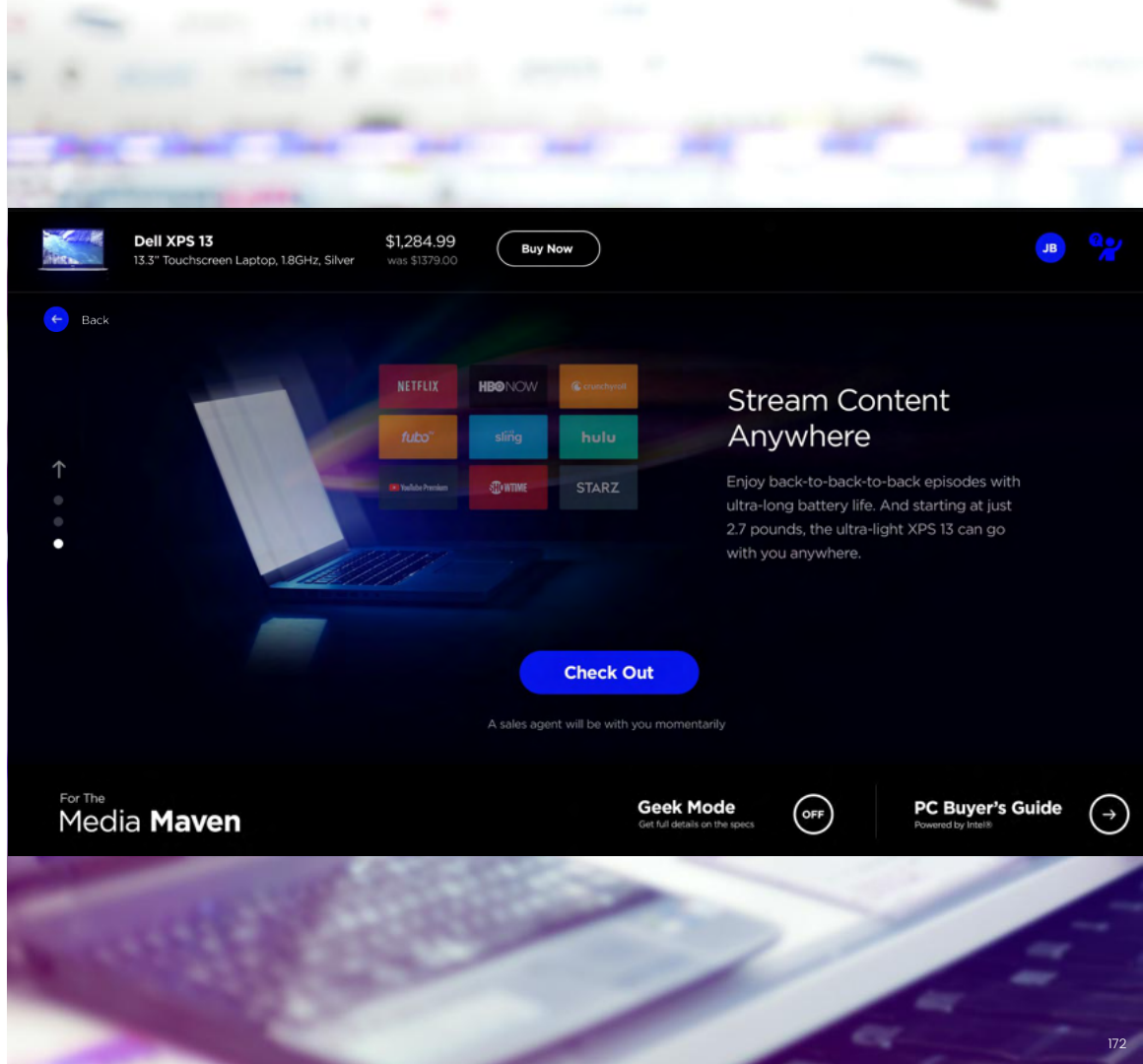We reinforce benefits already mentioned while bringing up a few more.

Catch her at the moment when she's ready to buy

After scrolling down, Julie can check out or save all this info back to her QR code for further consideration.

After being reminded of what a great streaming machine this PC is, she taps 'Check Out' to call a salesperson over to finalize her purchase.

Closing the deal

The salesperson arrives, with Julie's PC profile reflected on their tablet, already synced with what's on the IPOS screen. Any final questions are answered quickly.

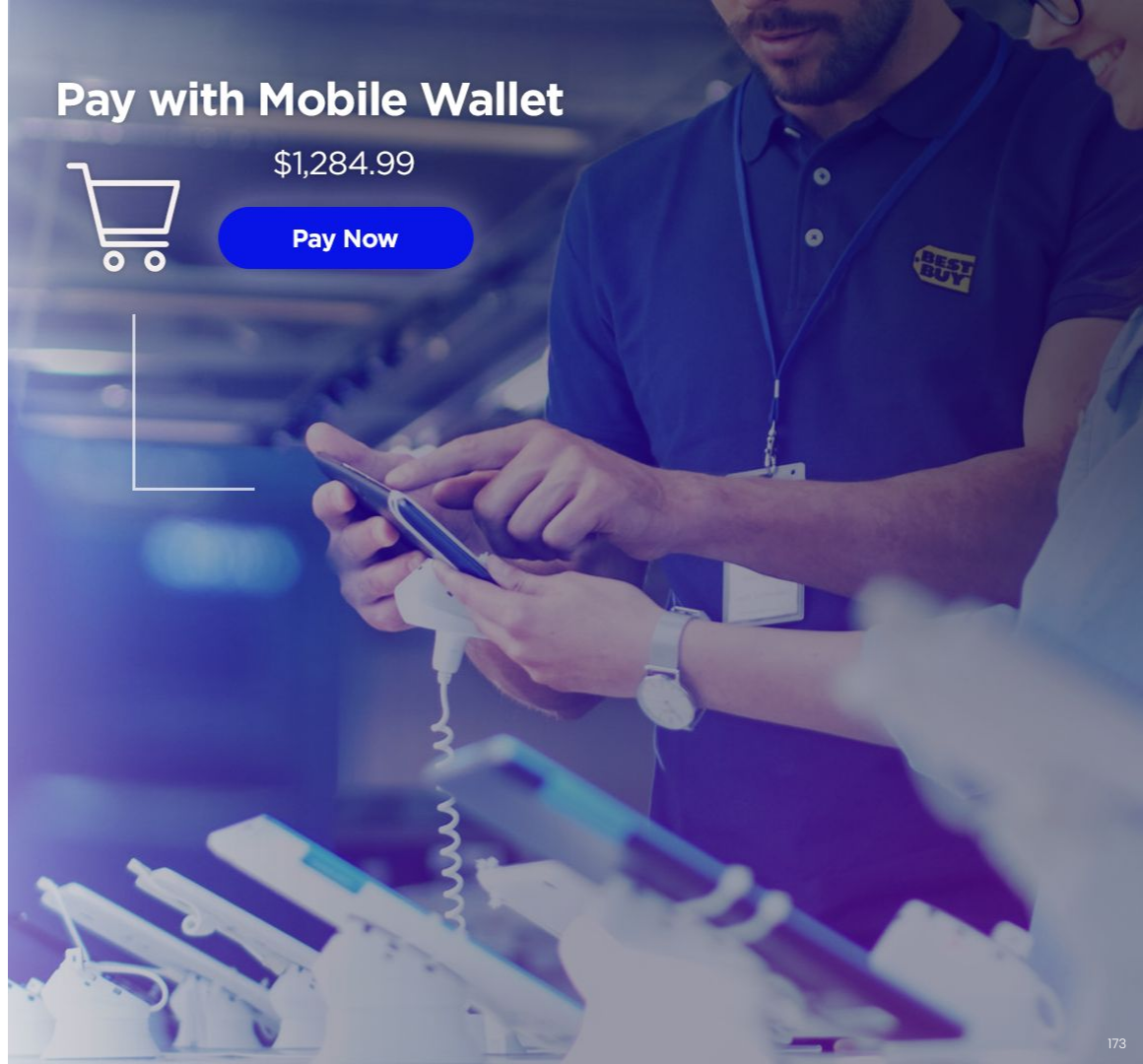Ready to buy, Julie holds her phone near the tablet to complete the payment with her mobile wallet.

New device in hand, Julie heads home, dreaming about her next video project.

Pay with Mobile Wallet

$1,284.99

Pay Now

Unveiling the product

Within the hour, Julie gets an email that features an 'Intel unveiling' video for the product she's purchased.

It builds excitement around the product design and features. Then it walks her through the first steps of exploring the device.

More than ever, Julie is confident that Intel is giving her the right kind of power to meet her unique purpose and she can't wait to play with her new laptop.

Tony Owens

Human-Centered Product & Service Design Leader

tonyowens@uxarchitect.net | www.tonyowens.net | linkedin.com/in/tonyo | 347.332.3030