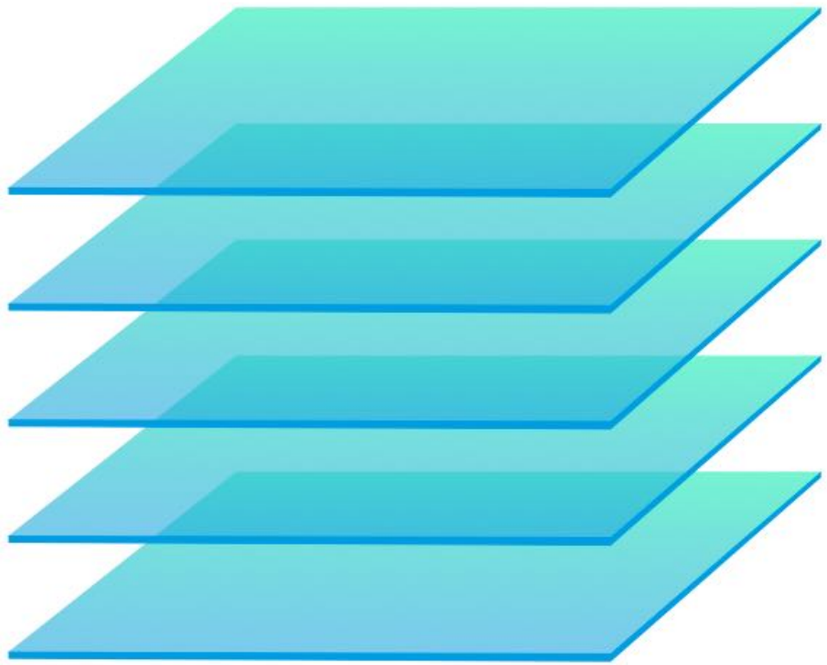
David Service

User-Experience (UX) Strategy & Product Design

Selected Samples

Latest Revision: February, 2021.



8	$15M	52
Years of UX Experience	Generated/Saved for Clients	Articles, Videos, & Reviews

The story so far...

For the past 8 years I've helped organizations solve challenging business problems by delighting their users with meaningful, top-quality solutions across web, native apps, and service-based platforms.

I've worked with diverse teams (large and small) to create detailed UX research, comprehensive project strategy & planning, and compelling design deliverables.

During that time I've been able to contribute to successful projects in the following industries:

- Education & School Administration.
- Legal Services.
- Creative Agency Services.
- Consumer Goods.
- Hospitality Services.

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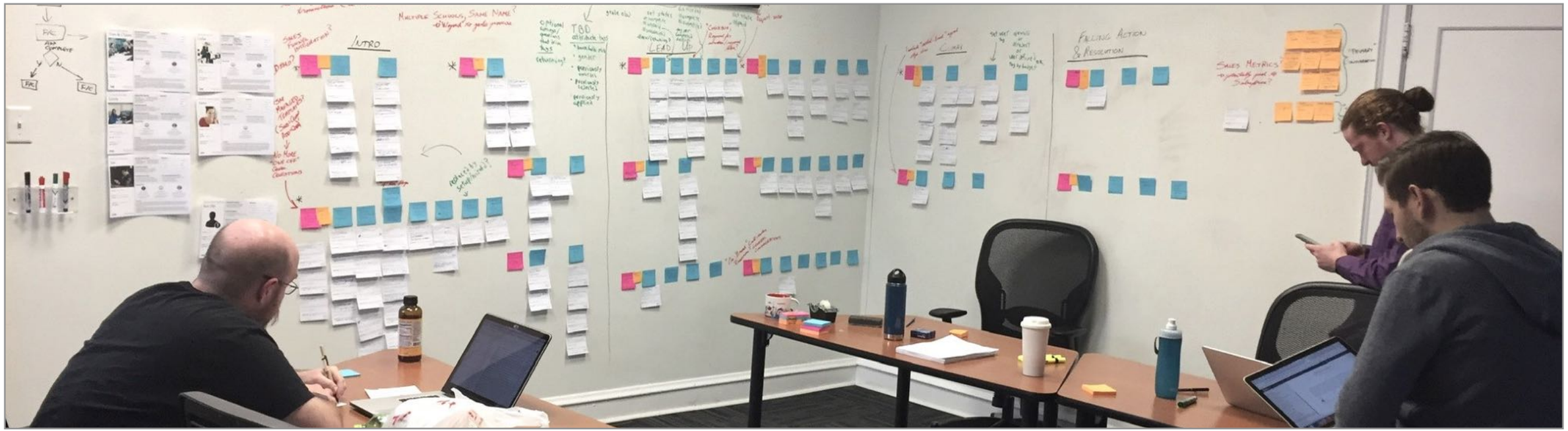
Client: Independent School Management (1/8)

Project Scope: UX Strategy & Product Delivery



About the Project:

Serving private and independent schools around the world for over 40 years, Independent School Management (ISM) provides guidance and support that enables the best educational experience possible.

Facing increased competition in several aspects of its business, ISM was looking to re-invigorate their offerings with fresh value while keeping a close eye on streamlining their current operations.

My Role:

Initially brought on for a short-term consultation to help with UX Research & Discovery, I was asked to stay on for nearly 2 years to lead several subsequent product design efforts.

Working with in-house specialists, stakeholders, and a broad array of users, I built and mentored several dedicated product teams from scratch to perform in-depth research, product planning, and design.

Results:

- **Ground-up redesign of flagship software;** massively increased usability and decreased maintenance costs.
- **Streamlined digital Survey Product;** 300% increase in initial productivity (3 days to 1) & introduced new automated product offerings.
- **Content Strategy integration for Salesforce;** created single source of data across multiple departments.

Research & Strategy

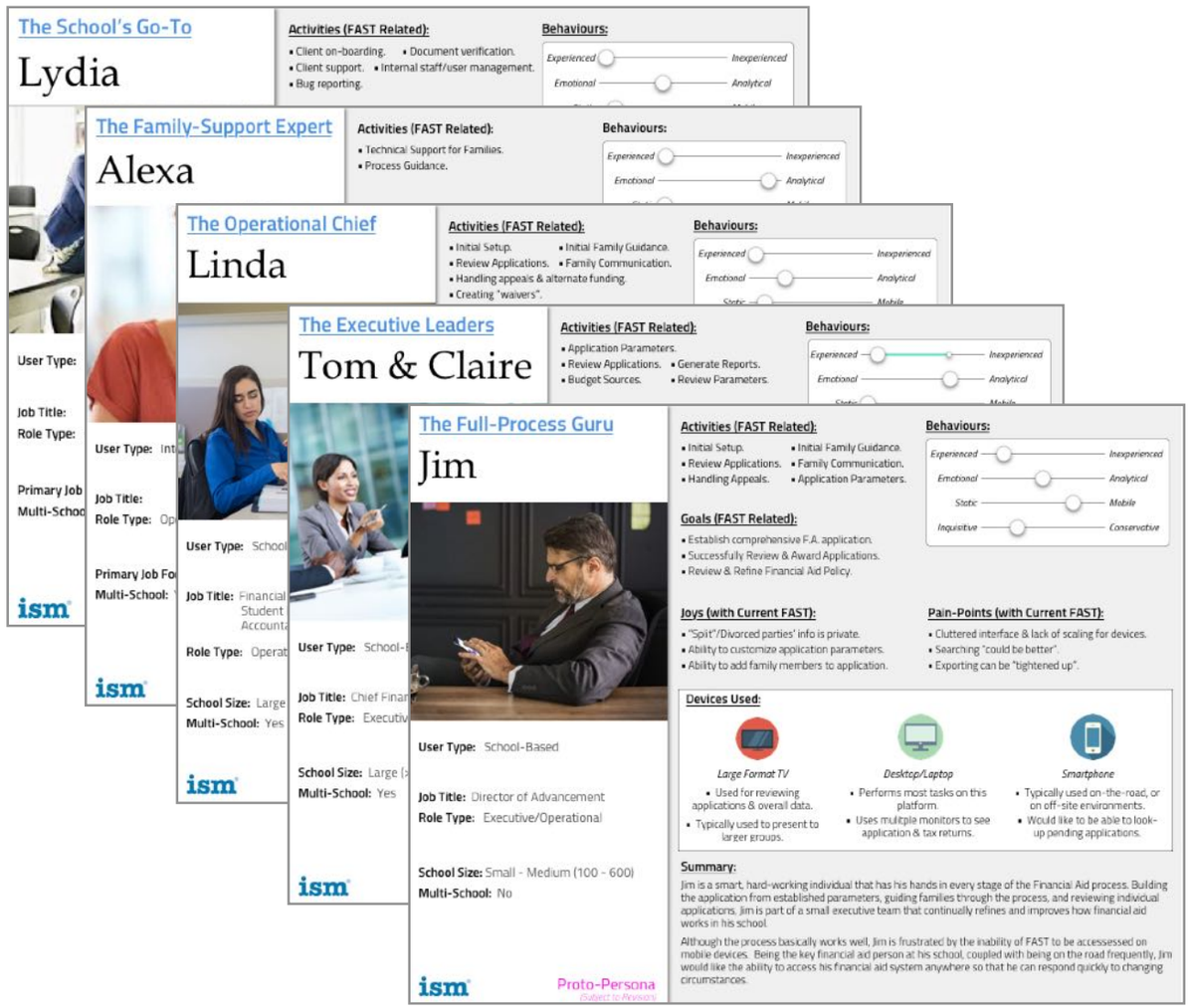
The first stage of product planning took the form of intensive discovery research conducted over a 6-week period with users, stakeholders, and subject matter experts (SMEs).

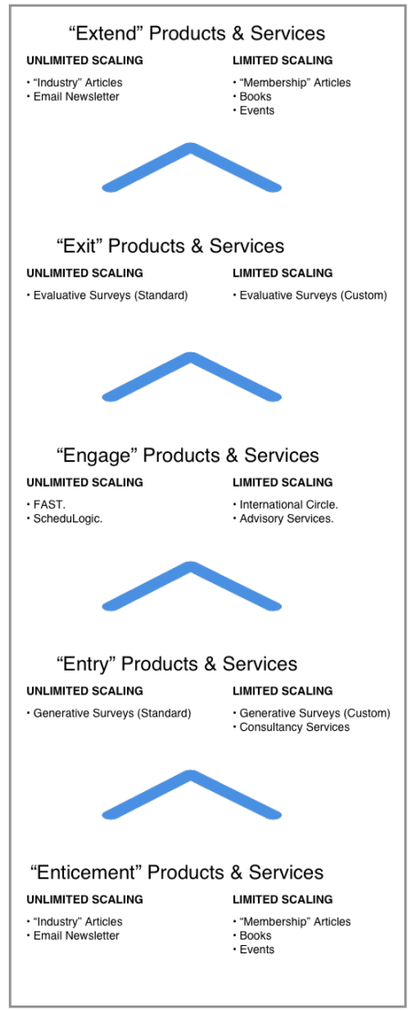
From these findings, I was able to present a clear picture of the current marketplace, how it was being served, and where ISM had the ability to deliver value in an unprecedented way.

Once research was condensed into easy-to-reference deliverables, I guided the newly-formed team through the product planning process to determine version release goals and set timeframes for completion.

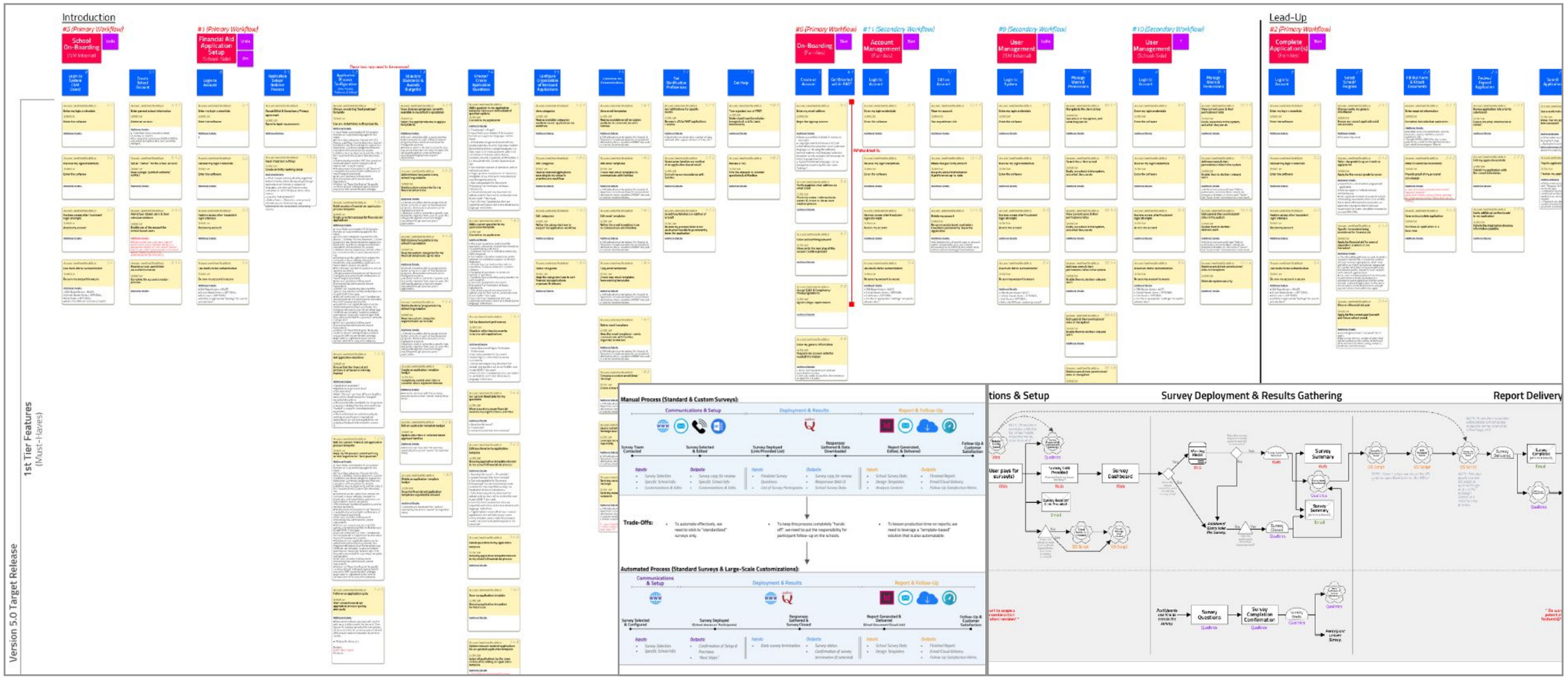
Deliverables Included:

- UX Discovery Research Reports & Presentation.
- Detailed Personas.
- User-Story Map & Delivery Plan.
- "Vertical" Analysis.
- Technical Specifications.





Personas & "Vertical Integration" Analysis - In addition to specific project deliverables, an on-going analysis of ISM's market "vertical" was produced to elicit stakeholder feedback, keep project teams aware of how their work tied in to other areas of the company, and help direct limited resources to where they could be most profitably used.



User-Story Maps & Process-Flows - For purely digital products we were able to chart our content & functional requirements across a shared user-story map, while for more complex multi-touchpoint solutions we would use broad process flows to understand the components and their interactions before moving on to the specifics.

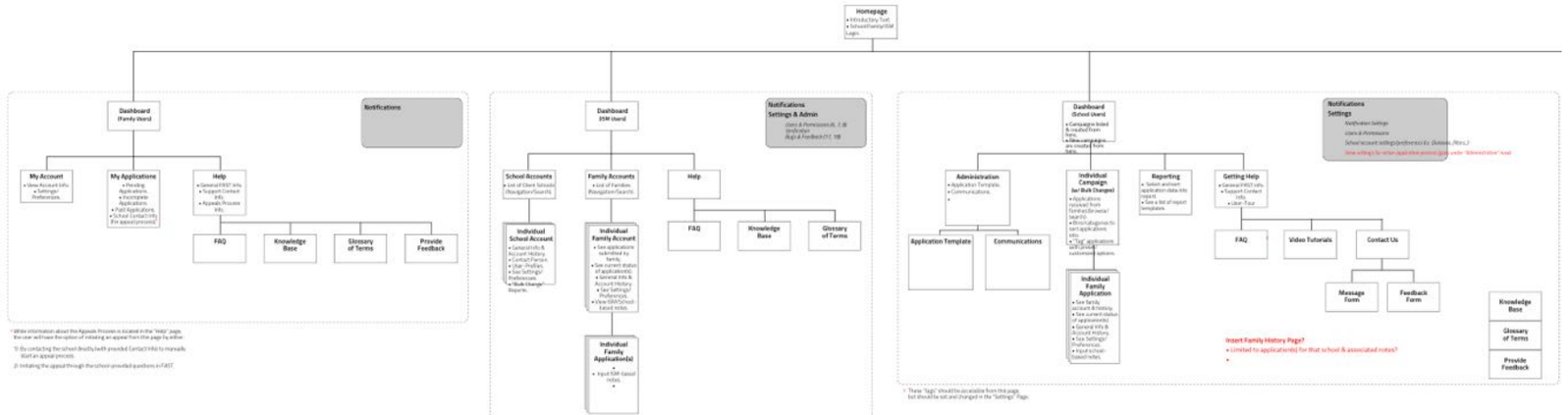
Design

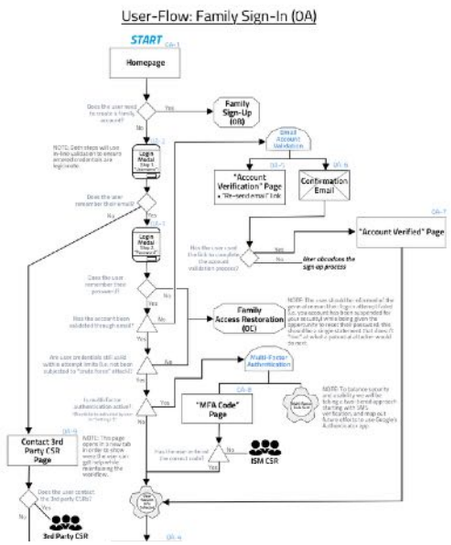
Once research and product planning were completed, we determined the optimal UX strategic approach for each project and began the process of gearing-up each team to work co-operatively according to that strategy.

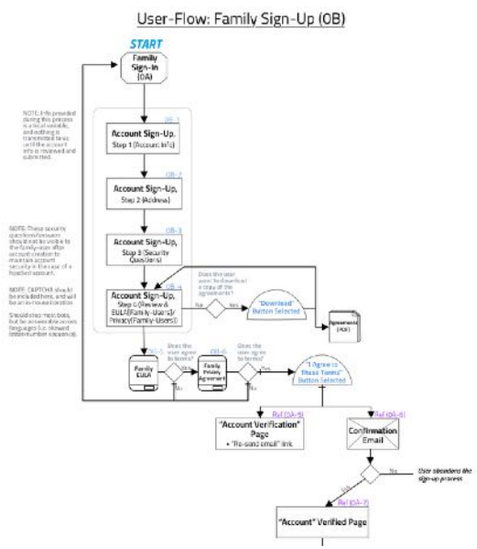
A wide range of deliverables, including wireframes, interactive demos/prototypes, and a comprehensive style guide were produced and shared with stakeholders so that they could stay abreast of our progress.

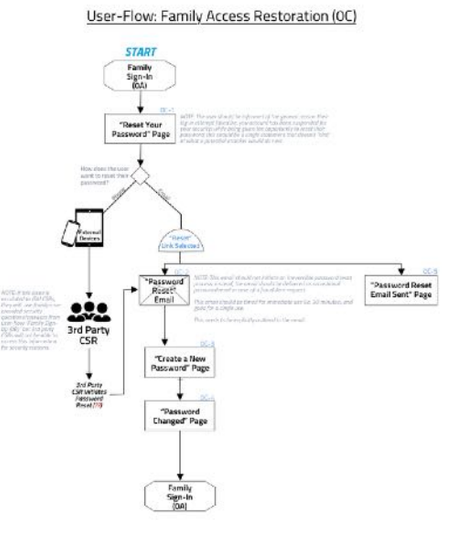
Deliverables Included:

- Information Architecture & User-Flows.
- Wireframes.
- Interactive Prototypes.
- Live Demos.

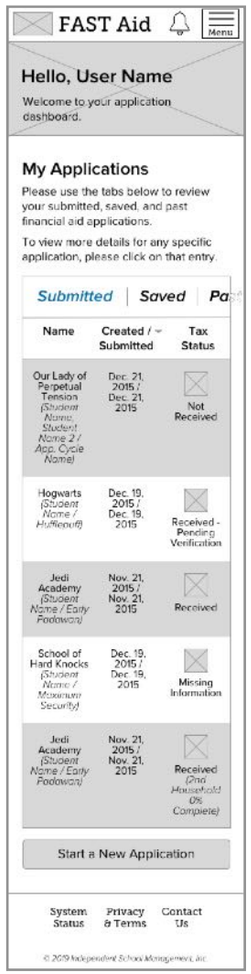


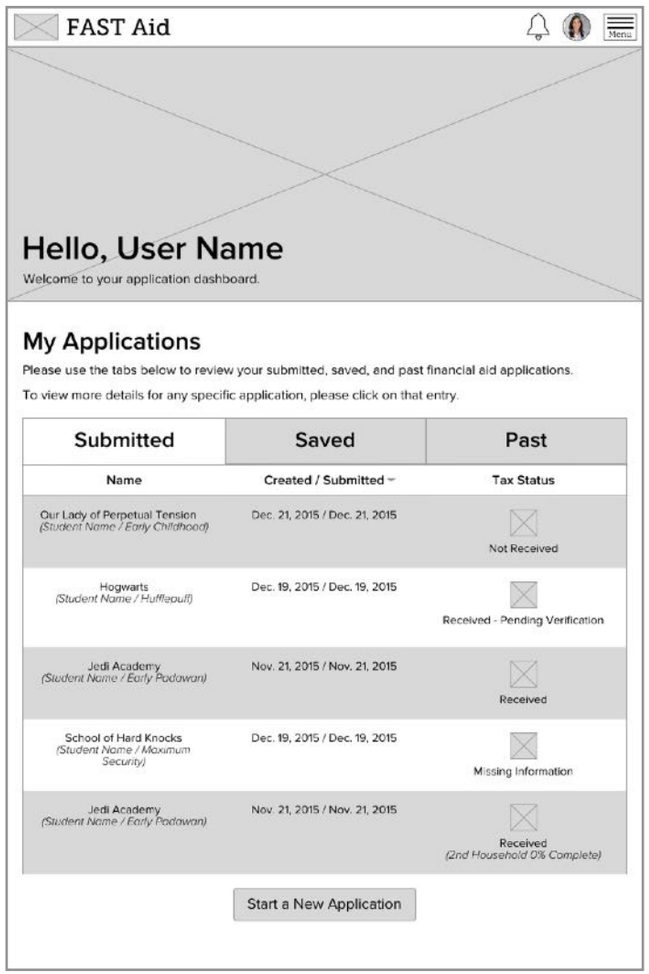


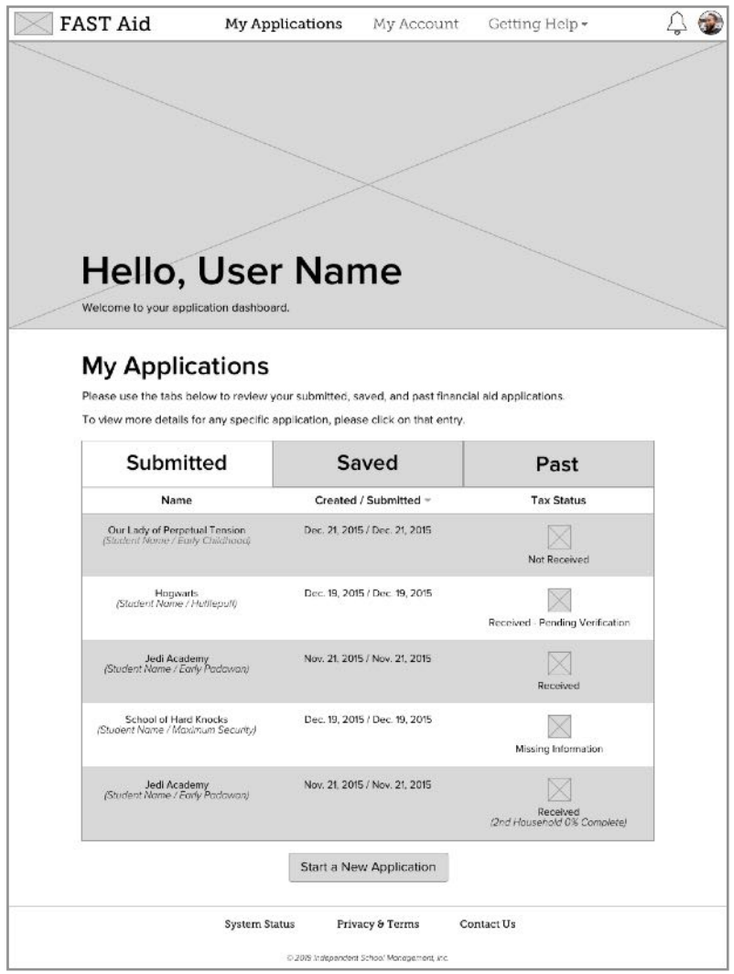


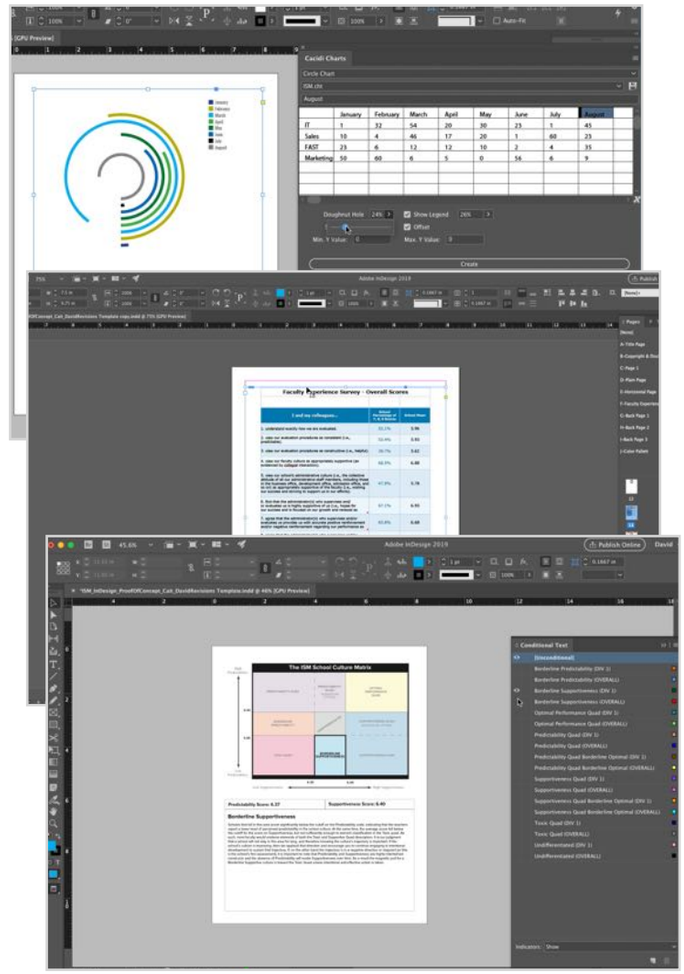


Information Architecture & User-Flows - Card-sorting was used with each general type of user (i.e. parents/students, educators, support staff, etc.) to design a unified information architecture. From there we could chart a user's likely path through the application, and populate each step with the needed content/functionality.

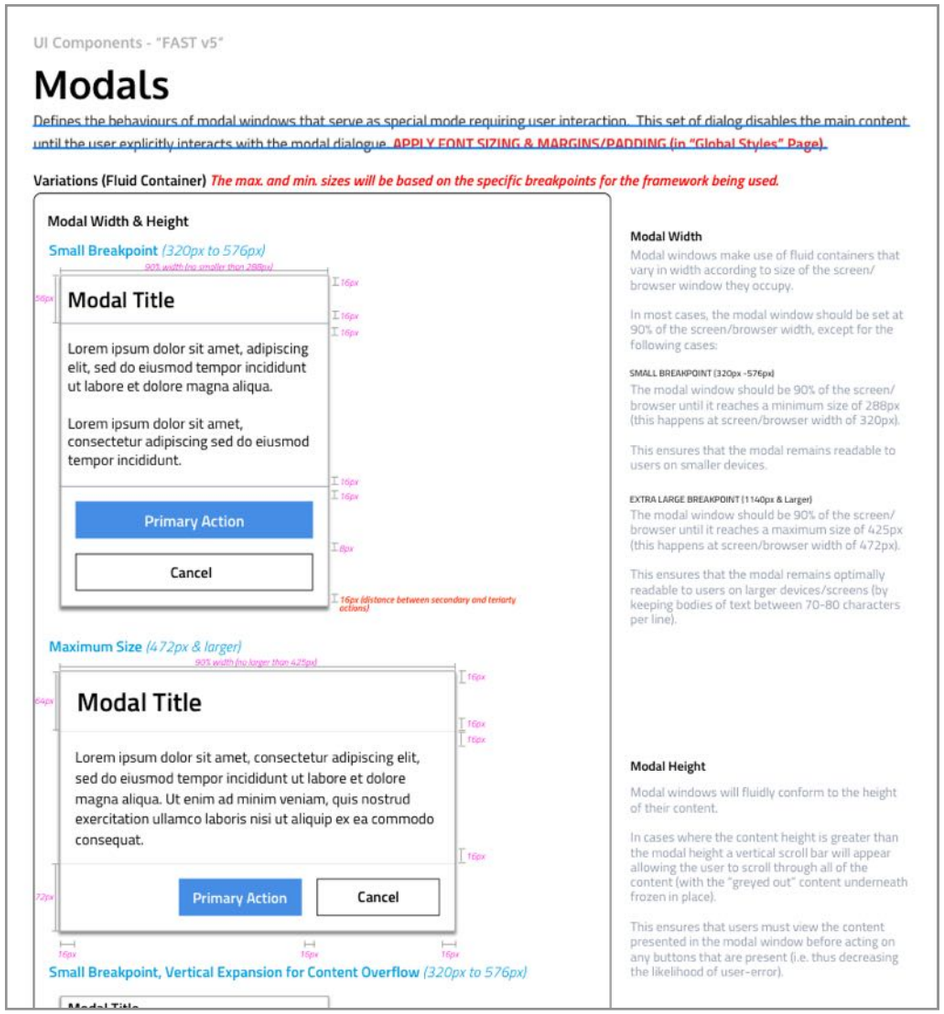


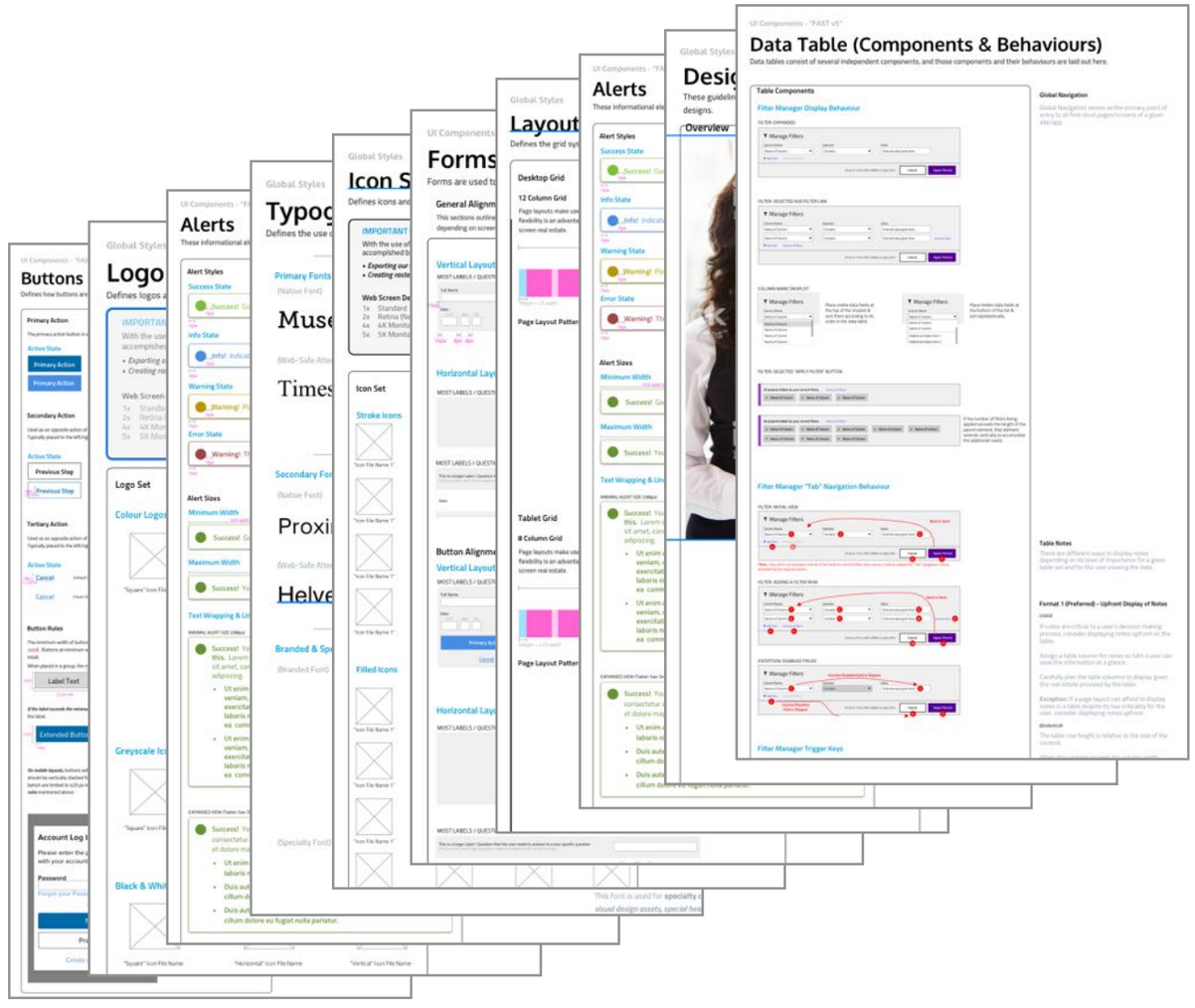




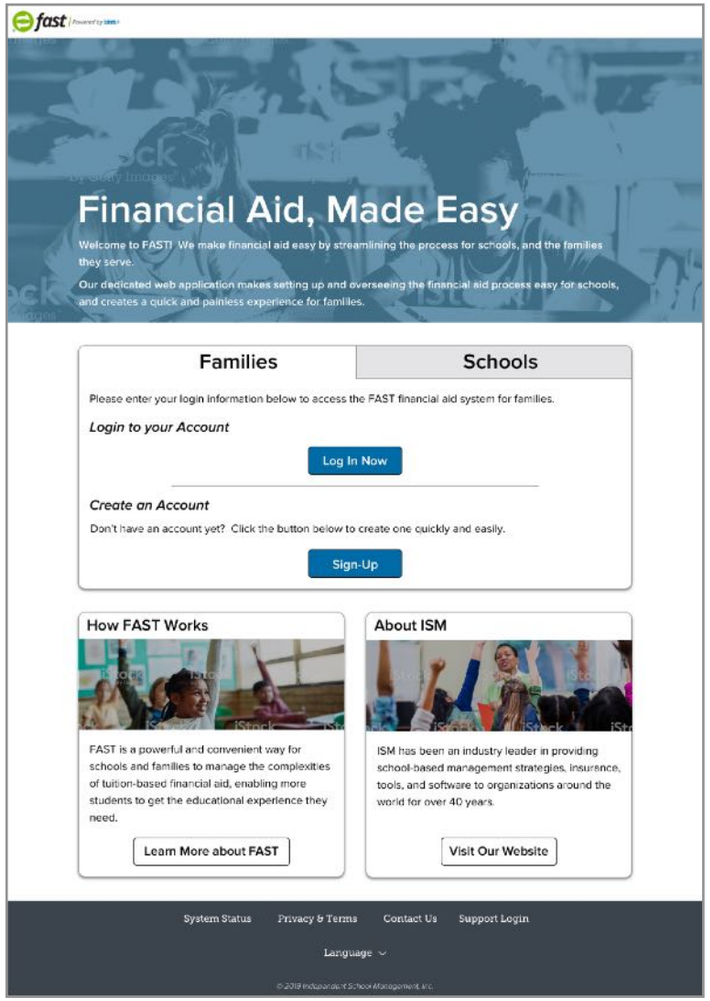


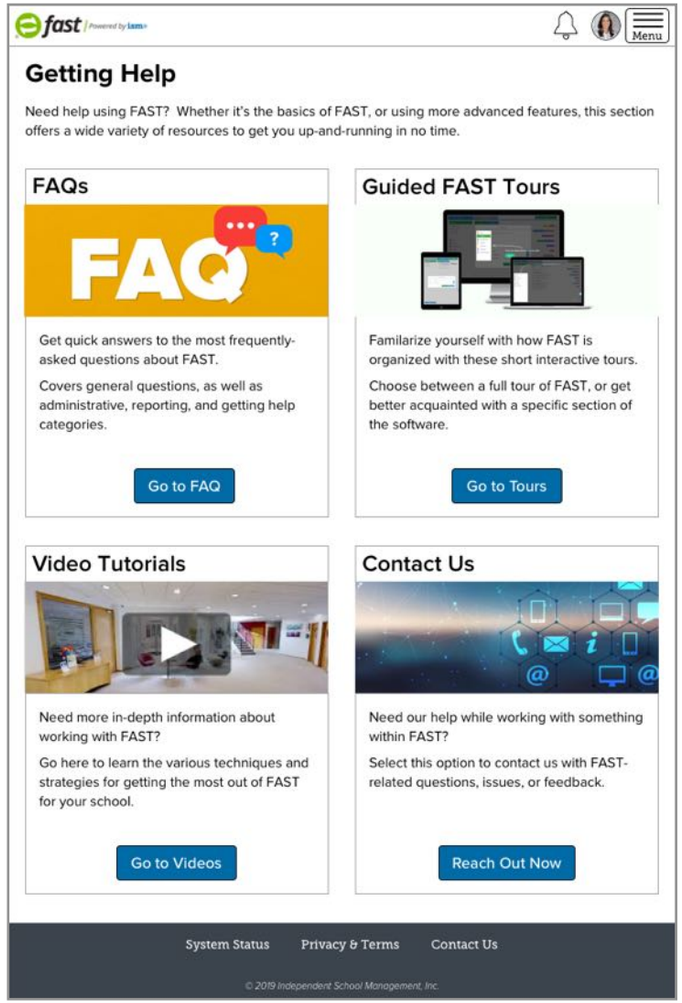
Wireframes, Responsive Prototypes, & Live Demos - After rough sketches were reviewed by the team, refined wireframes were produced and turned into interactive prototypes for usability-testing. For multi-touchpoint solutions, we used live demonstrations to show stakeholders each iteration of the project in action.

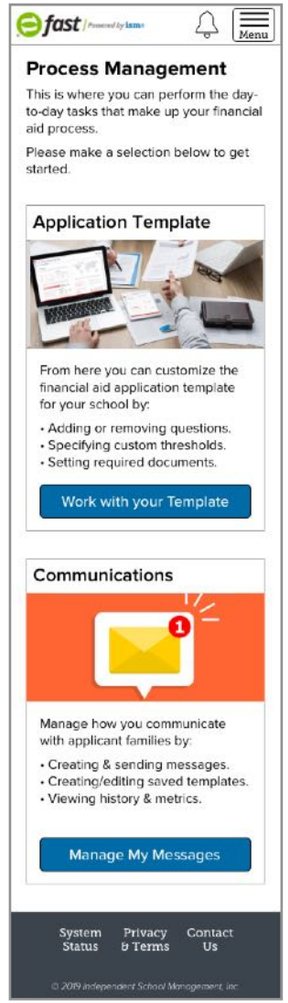


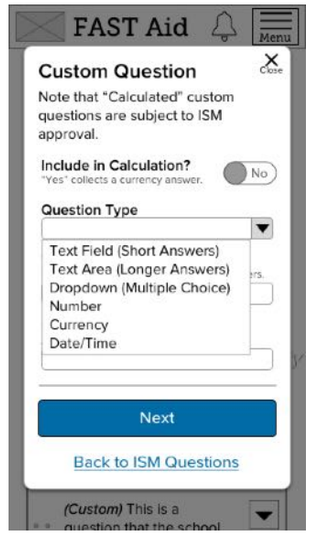


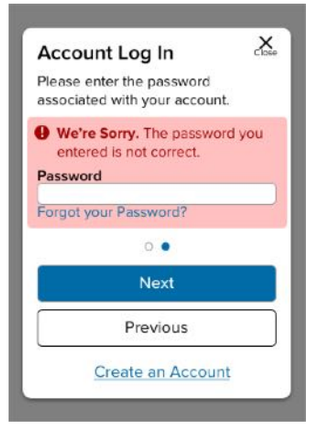
Living Style Guide & Design System - As design work progressed, interface components were standardized and updated through a comprehensive Style Guide, which became the basis of a readily-accessible Design System that we used the "Pattern Lab" framework to build. This greatly accelerated work on subsequent projects.











Branded Comps & Layouts - Before being passed off to the Development Team for production, finalized layouts (and any dependent states for those layouts) were produced and shared to minimize scope drift and avoid potential rework.

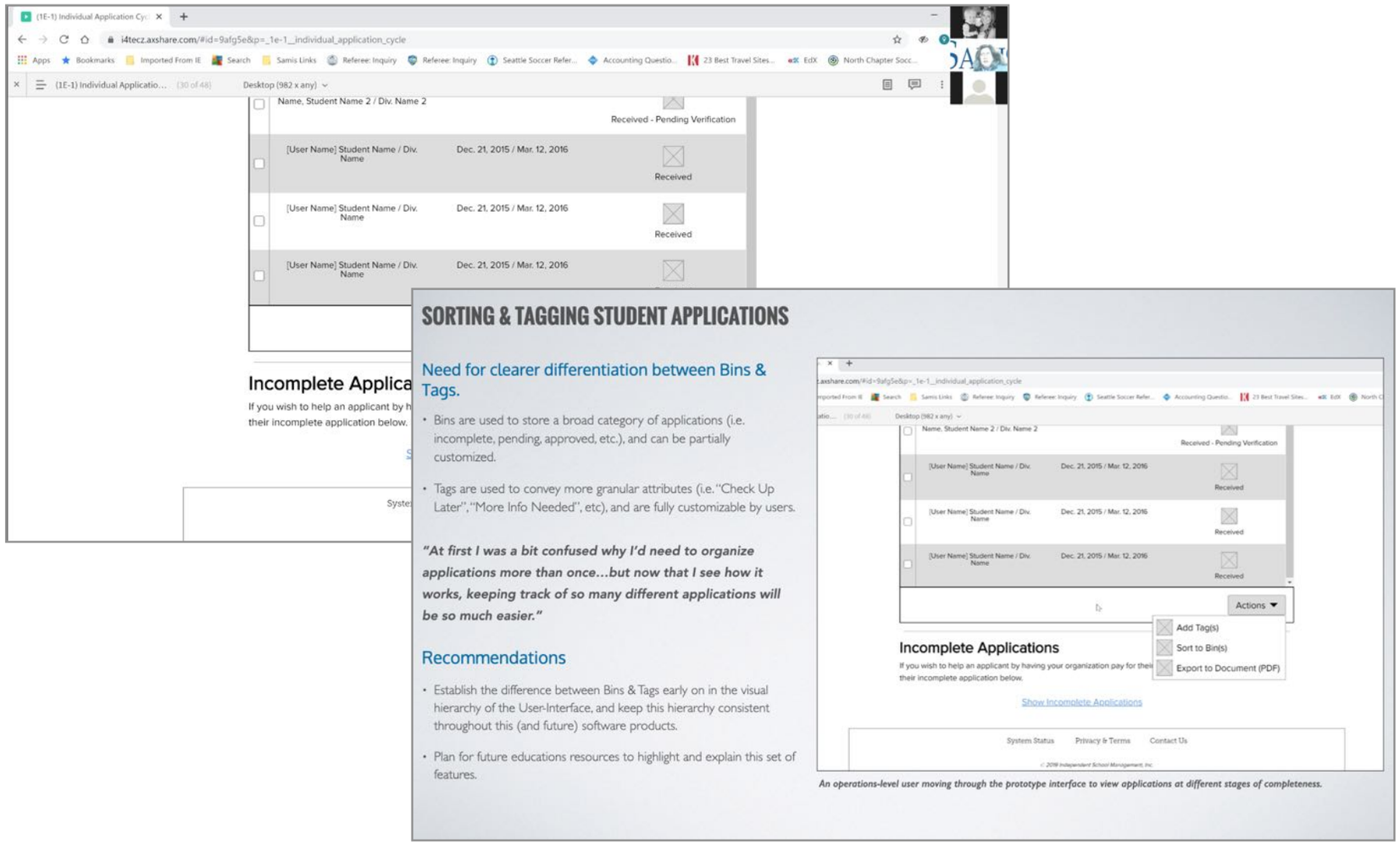
Testing & Validation

With each of our projects needing to reach a high bar for success, usability-testing and product validation was key.

Utilizing storyboards, interactive demos, and prototypes, we were able to gather invaluable feedback from users before finalizing designs that were handed-off to our development partners.

Deliverables Included:

- Usability-Testing.
- Process Feedback.
- Project Reviews with Stakeholders.



Usability-Testing & Stakeholder Reports - Each design stage in our "agile" process was rigorously tested with users, with the resulting feedback being the basis for redesigns and comprehensive monthly progress updates for stakeholders.

Client: Morgan, Lewis, & Bockius (1/8)

Project Scope: Digital Product Design & Optimization

About the Project:

Collecting over $2 billion in annual billings, Morgan Lewis is one of the world's largest law firms. With this success has come the on-going challenges of a large organization delivering timely and effective results to their client.

Facing new complexities and an evolving legal landscape, the firm was looking to create new products to deliver industry-class solutions for clients around the world.

My Role:

I was brought on to a newly-formed UX team to help with the development of several digital products, and to establish a framework for future UX efforts.

My responsibilities included:

- UX Strategy & Advocacy.
- User-Research (Generative & Evaluative).
- Mobile/Tablet & Web App Design.
- User-Testing & Validation.

Results:

- **Completed design of $12M eData Web App;** streamlined the collection & storage of critical case data.
- **Content & Analytics Strategies;** established a light-weight workflow for effective communications & data gathering.
- **Mobile/Tablet "Directory" Apps;** enabled faster and more efficient communication within the firm.
- **"Research Ops" guide;** developed in-house framework for future UX projects.

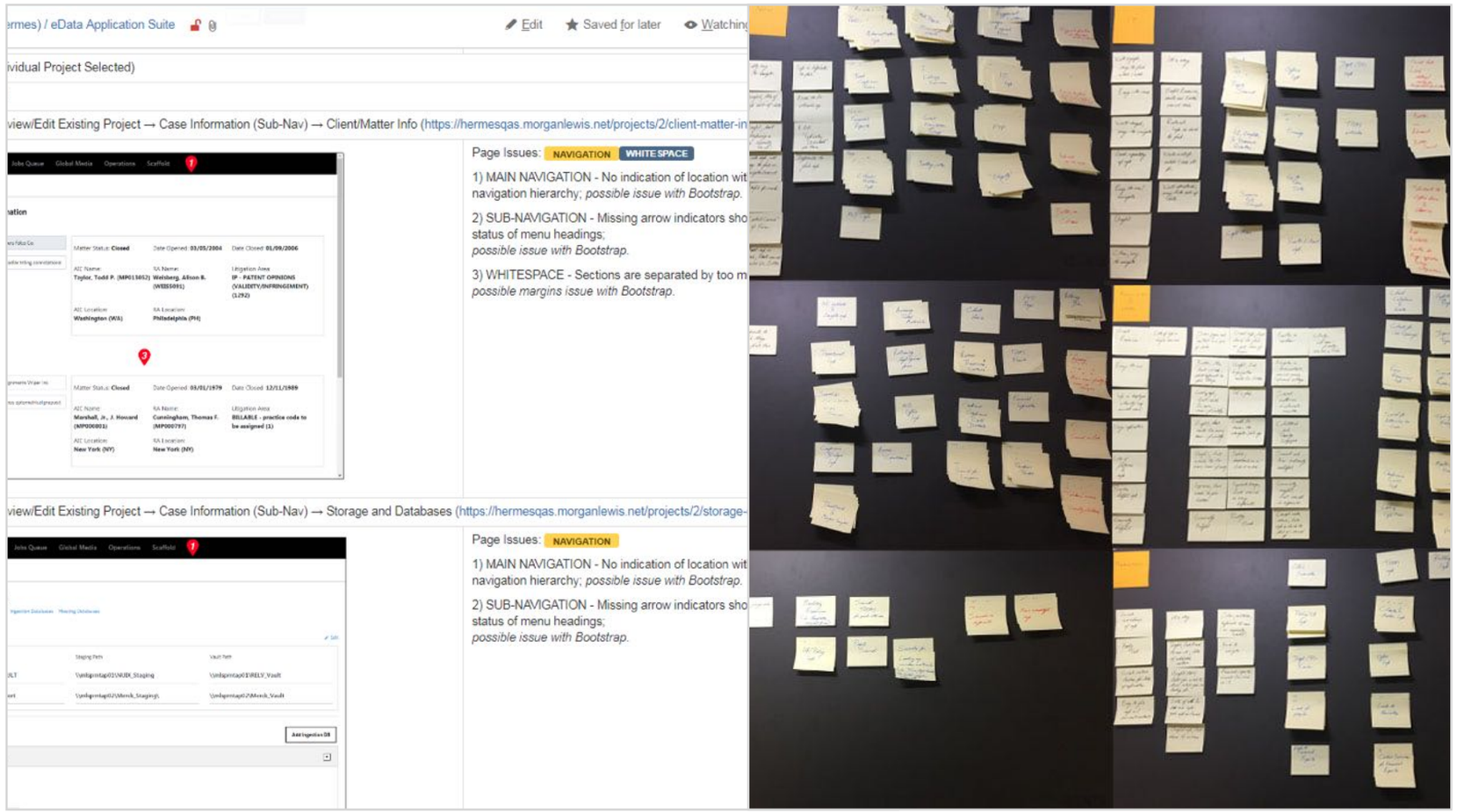
Research

To ensure that the diverse range of products required were successful, I helped the UX team to conduct a variety of research activities.

From research planning, survey writing and analysis, to analytics strategy, our goal was to introduce a variety of swift and efficient methodologies that would help product teams to generate more accurate requirements.

Deliverables Included:

- UX Strategy Planning.
- Survey Writing, Heuristic Review, & Findings Analysis.
- Analytics Strategy.
- "Research Ops" Plan.



Heuristic Analysis & Affinity Mapping - We used these techniques to identify challenges and pain-points that users were having with existing products, and then used the results to create an optimization roadmap.

The Analytics-Based UX Workflow

Discovery & Prioritization:

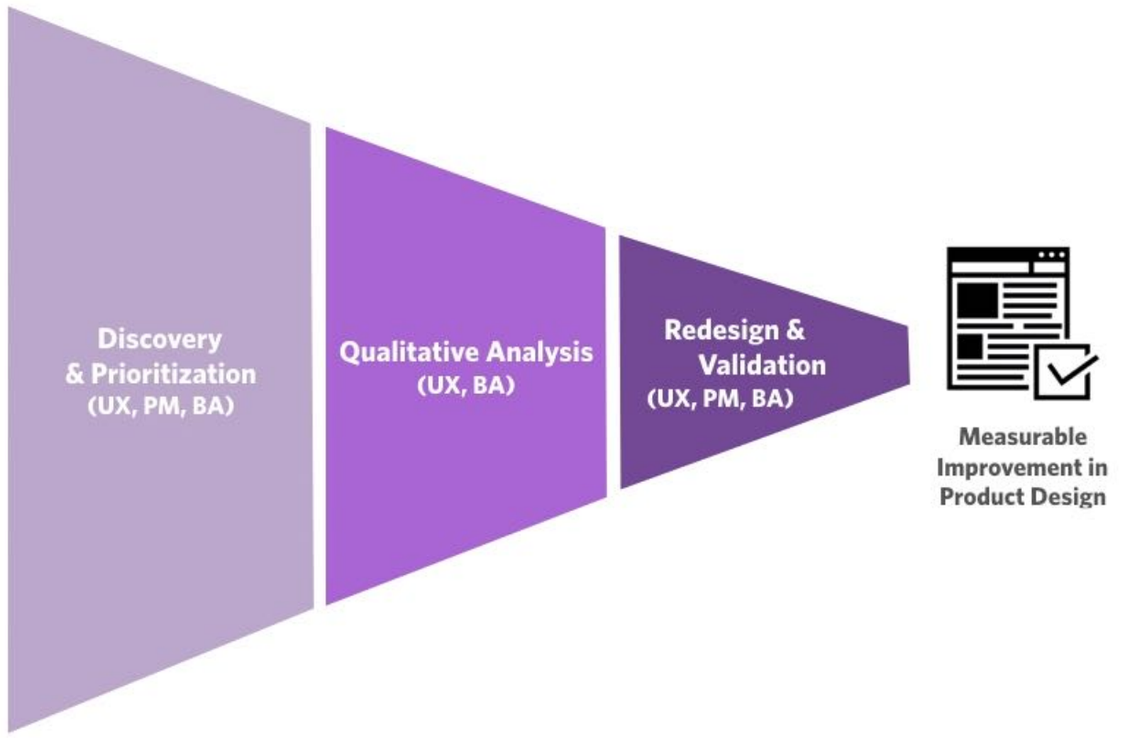
- Initial identification of problem areas (UX).
- Project scope planning based upon available data (PM, UX).
- Prioritization of issues & definition of success for each (PM, BA, UX).
- Synthesis of analytics data as additional research resource for future redesigns (UX).

Analysis:

- Qualitative research planning & Implementation (UX, BA).

Redesign & Validation:

- Redesign of affected areas of product (UX).
- User-testing & measurement of results (UX, BA).
- Validation of new design (PM).



UX Analytics Strategy - As part of a large intranet redesign effort, I introduced key stakeholders to a UX Analytics Strategy to improve the existing product by identifying problem areas to redesign.

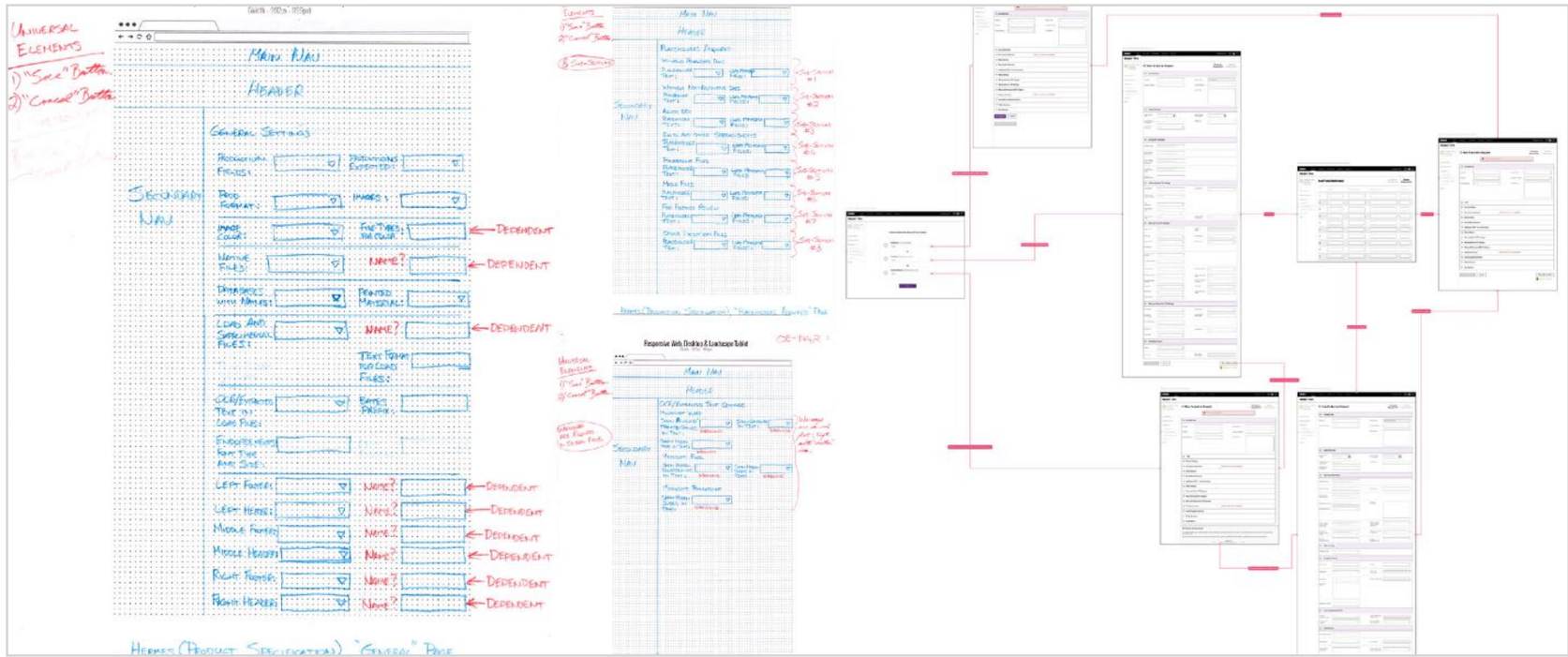
Design

From our completed research, the UX team used a variety of high and low fidelity design tools to explore potential solutions.

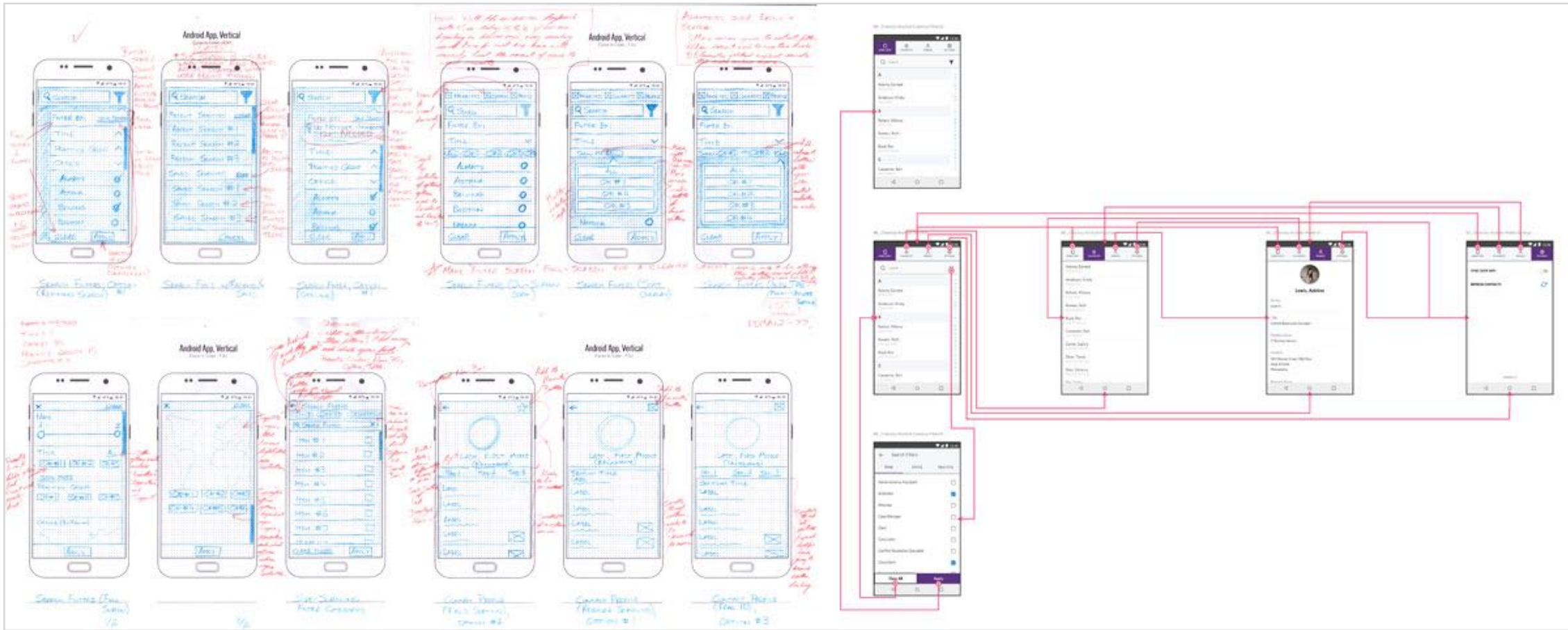
Appropriate solutions were then refined into styled mock-ups and prototypes, and during this process we took the opportunity to work with the in-house Marketing team to create a unified style guide for the entire range of digital products.

Deliverables Included:

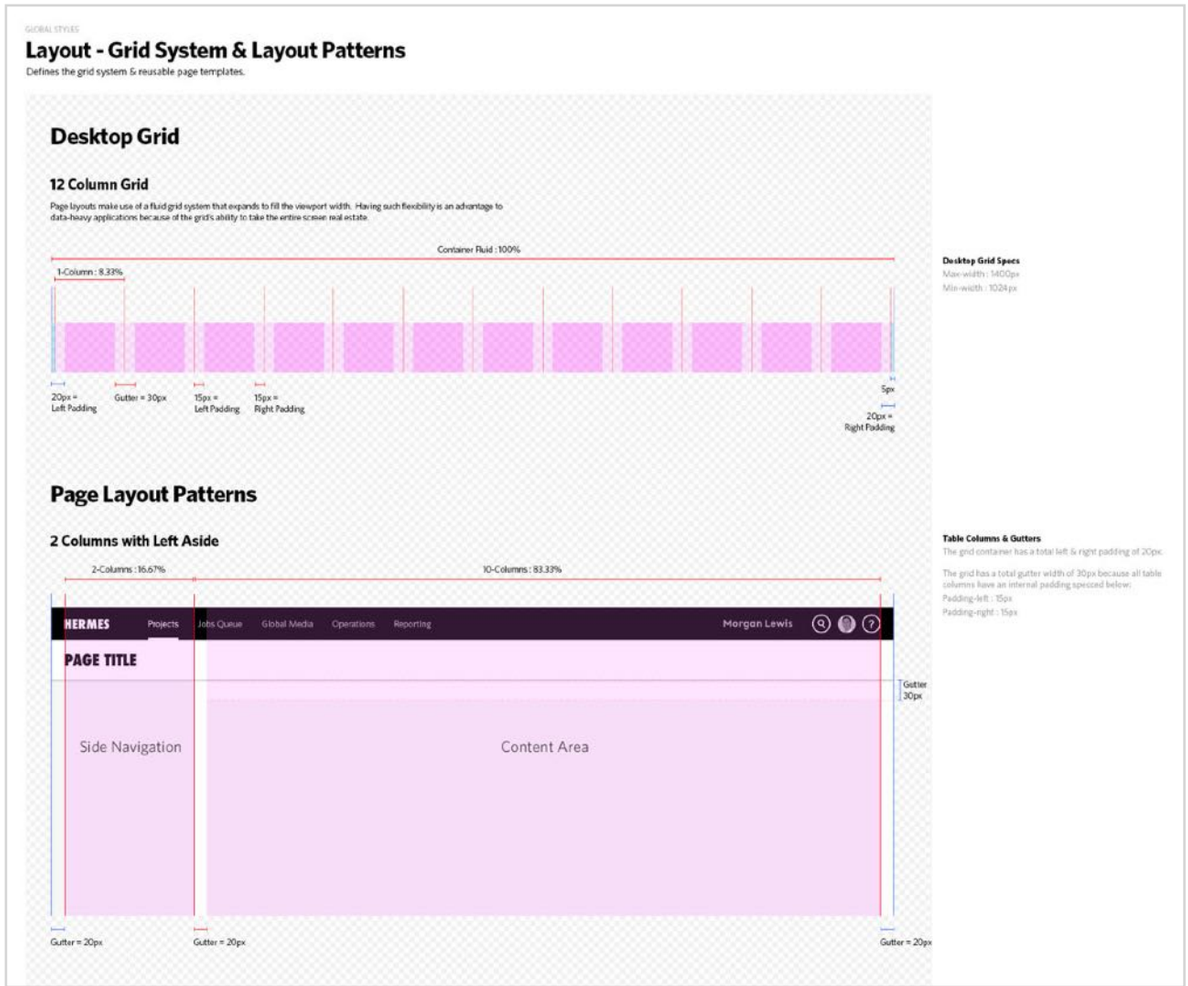
- Web/App Sketches & UI MockUps.
- Visual Asset Production & Unified Style Guide.
- Heuristic Review (eData Web App).
- Content Strategy Plan.



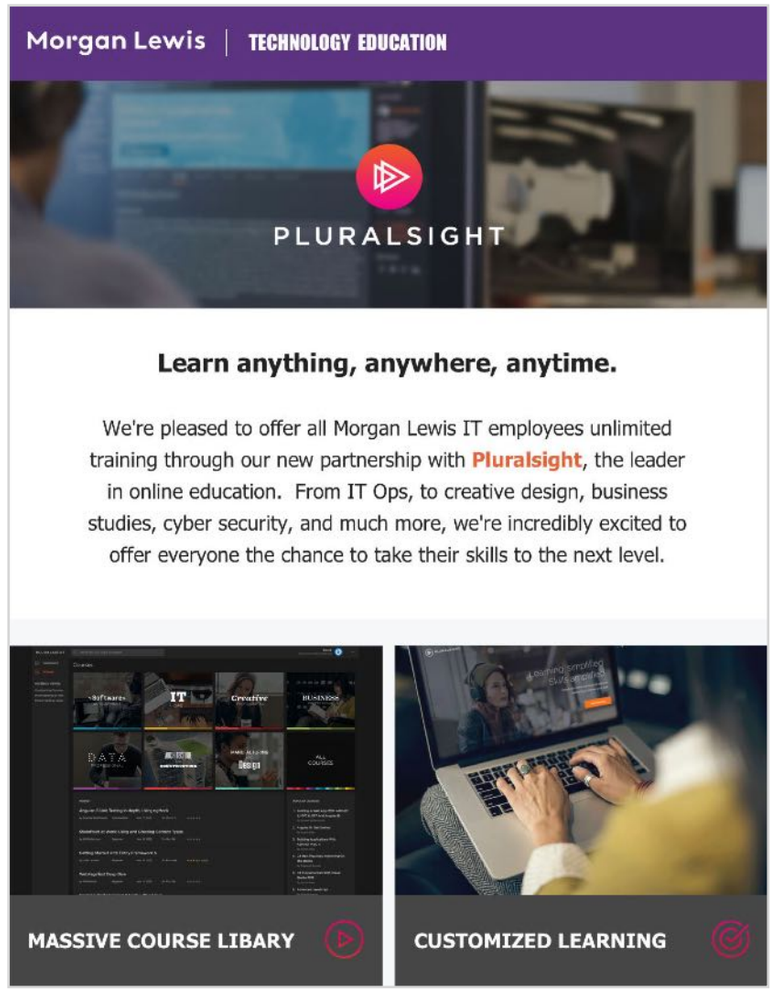
Wireframes & Mock-Ups (Web App) - Pencil and paper wireframes were used to flesh out rough ideas, and these concepts were later refined in Sketch so that they could be presented to stakeholders as a visual user-flow.



Wireframes & Mock-Ups (Mobile App) - Given the particular constraints of working with native phone apps in multiple environments (i.e. Android & iOS), rough sketches and refined wireframes were produced so that we could work out how to approach the needed content/functionality in each context.



Universal Style Guide - To ensure brand and user-interface consistency across digital products, the UX team assembled and refined a universal style guide.



Content Strategy & Email Design - A content strategy was designed and implemented to produce an ongoing company-wide email campaign which drastically raised awareness and participation in online training.

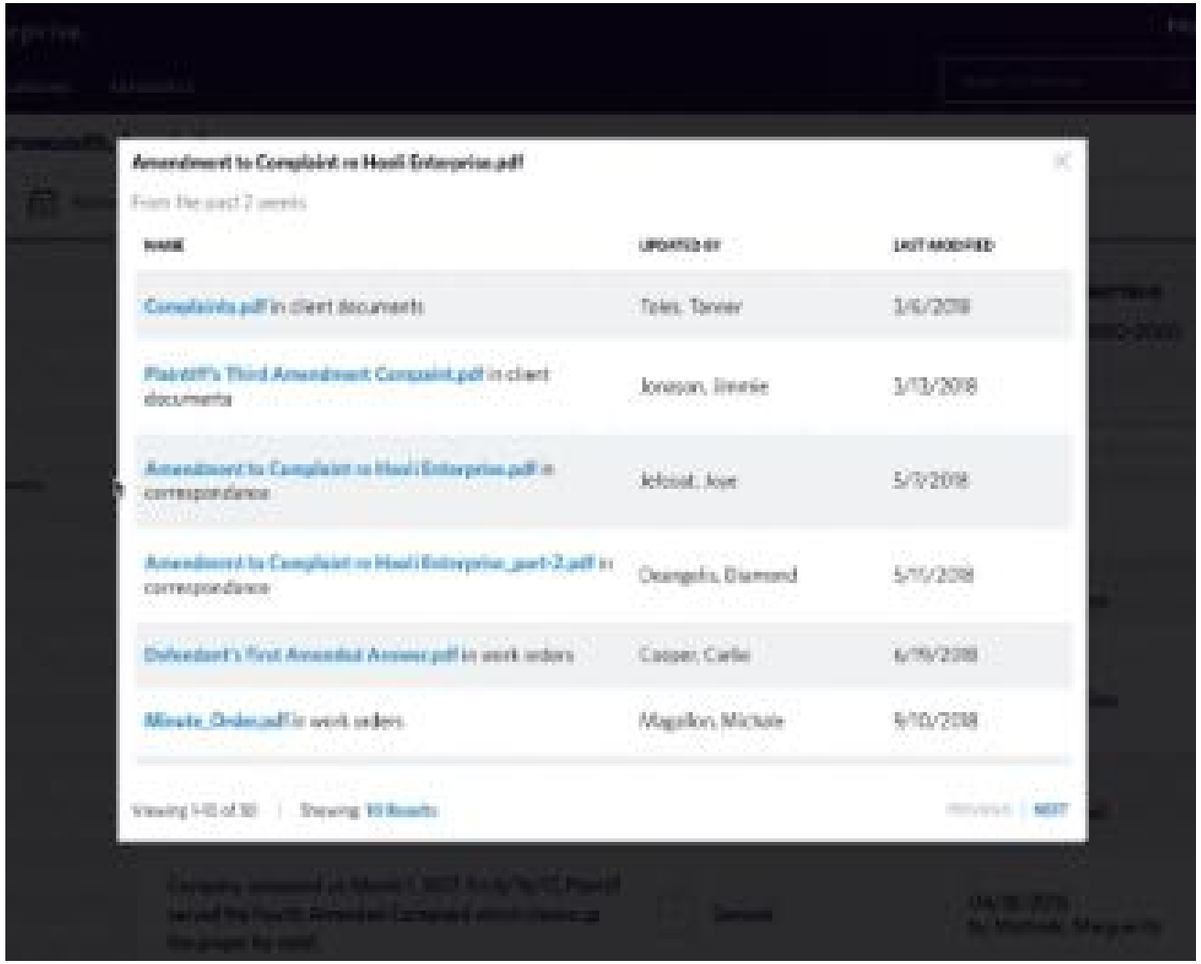
Testing & Validation

To ensure that our designs met users' needs throughout the organization, we conducted extensive usability-testing sessions with both prototypes and early production code.

We included as many project team members as possible for each testing session, so that everyone could observe the sessions and then contribute towards a solution. Refined design iterations were then demonstrated for project stakeholders for additional feedback and approval.

Deliverables Included:

- Usability-Testing.
- Prototypes.
- Project Presentations/Review with Stakeholders.



Native & Axure Prototypes - The team took advantage of both web-based and Axure-based prototypes during usability-testing and design iterations, which allowed us to explore different functionality and technological limitations.

SORTING AND FILTERING

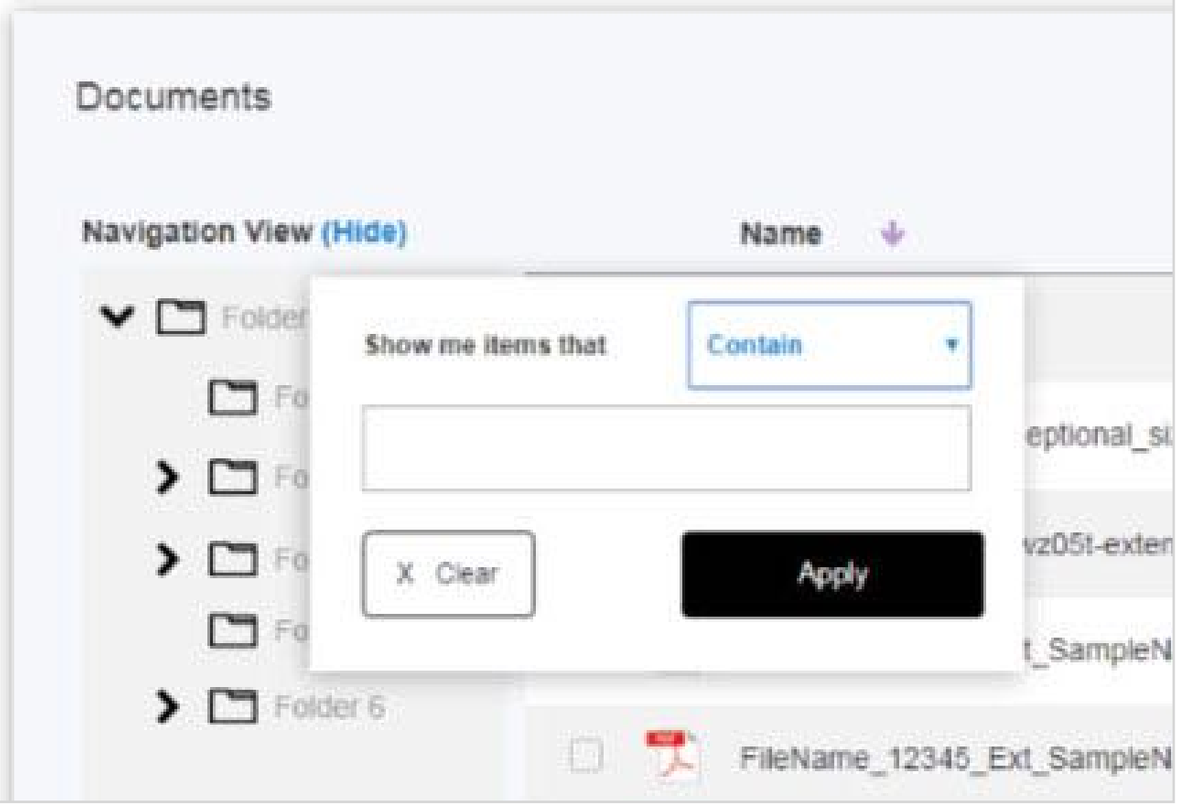
Need clear and consistent sorting and filtering functionality

- Sorting and filtering is often used to easily find particular documents, narrowing search results, and seeing recently updated Client Sites

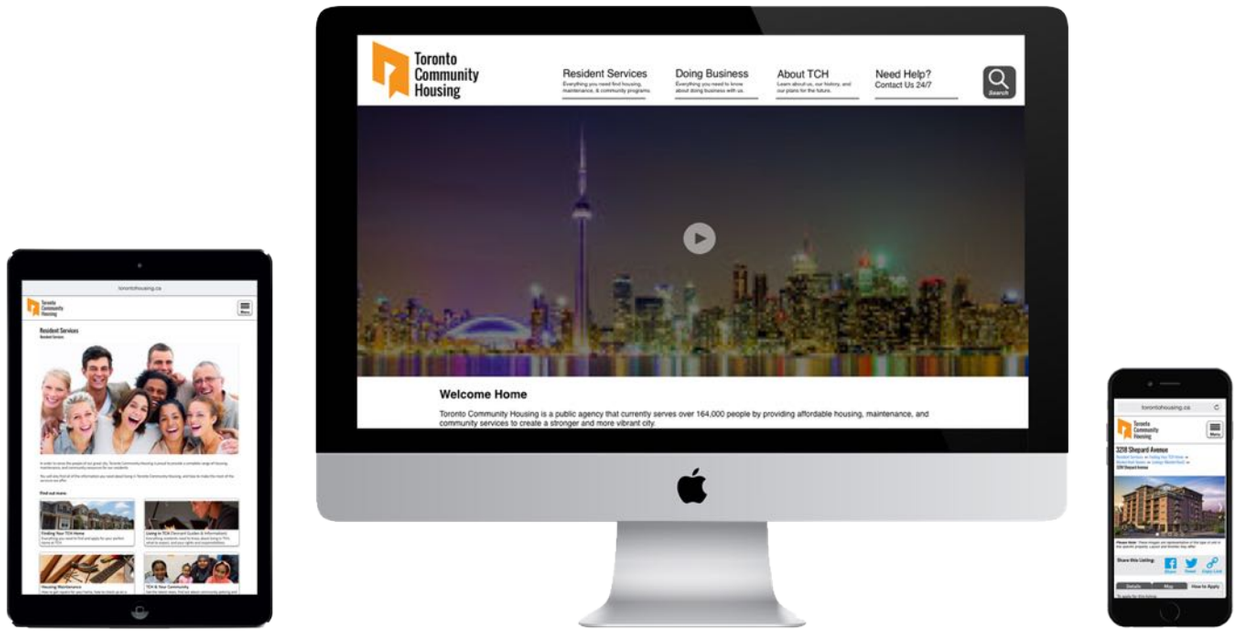
"I see that things are organized alphabetically, but what if I need to find things by date? How about seeing what's been last updated?"

Recommendations

- Work with development to ensure that filtering/



Usability Findings - Our usability-testing produced validated features, while also providing specific targets for improvement in the next design iteration.



About the Project:

Facing an unprecedented rise in housing prices over the last several years, the Toronto Community Housing corporation needed a more efficient way to provide placement and support services to over 164,000 city residents in need of affordable housing.

This redesign focused on making a comprehensive array of services easy to access and understand, thereby reducing costs and inefficiencies in other areas.

My Role:

I undertook a full UX design process consisting of research, design, and validation phases to redesign the Toronto Community Housing website.

My responsibilities included:

- UX Strategy & Requirements.
- Competitive Heuristic Analysis & User-Research.
- UI Audit & Redesign.
- User-Testing & Validation.

Results:

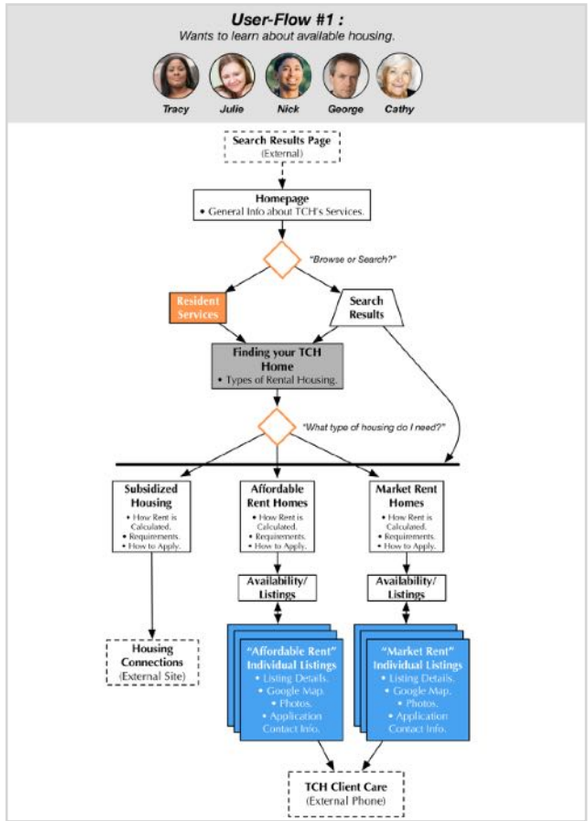
- **Fully-responsive website;** enabled faster and easier access for people using non-desktop devices.
- **90% increase in successful task completion;** enabled a wide range of needs to be met without the need for additional touch-points (i.e. call centre, emails, etc).
- **50% average reduction in task time;** users were able to solve issues more quickly, and accomplish more per visit.

Research

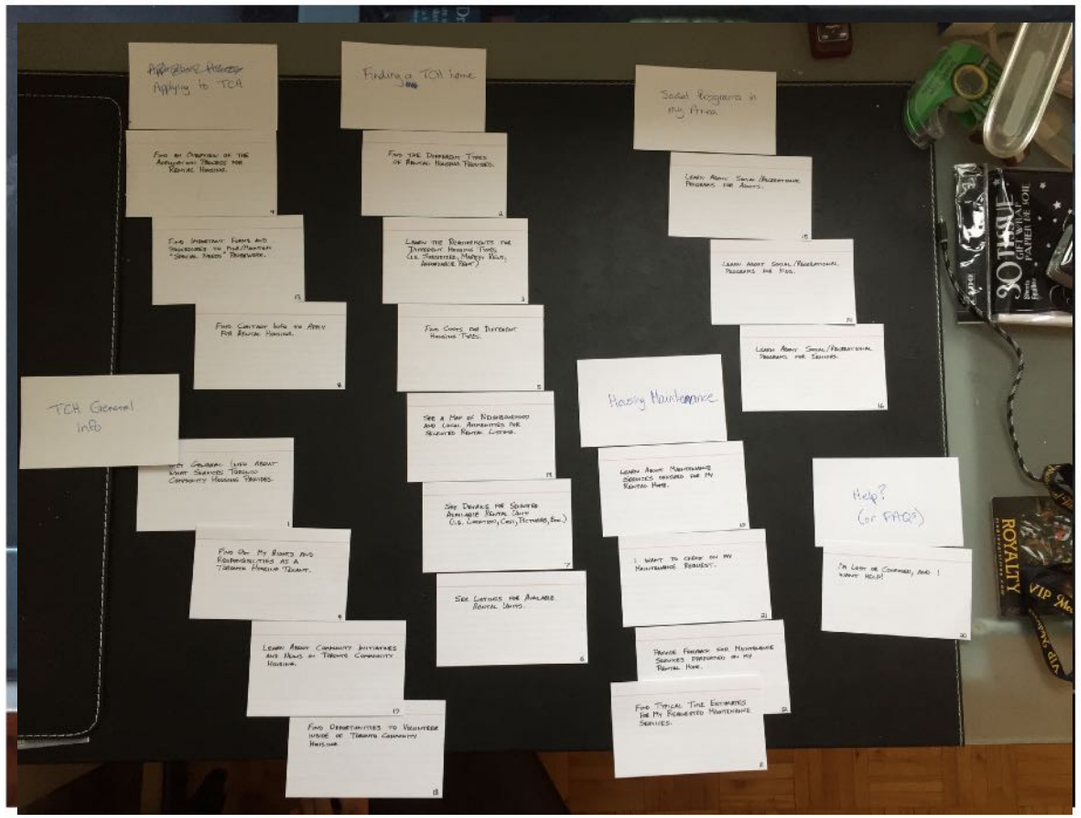
The first step for this project was to identify and understand the general problem(s) that need to be solved for the organization, how we could solve them by delivering value to users, and the specific means of building that solution.

Deliverables Included:

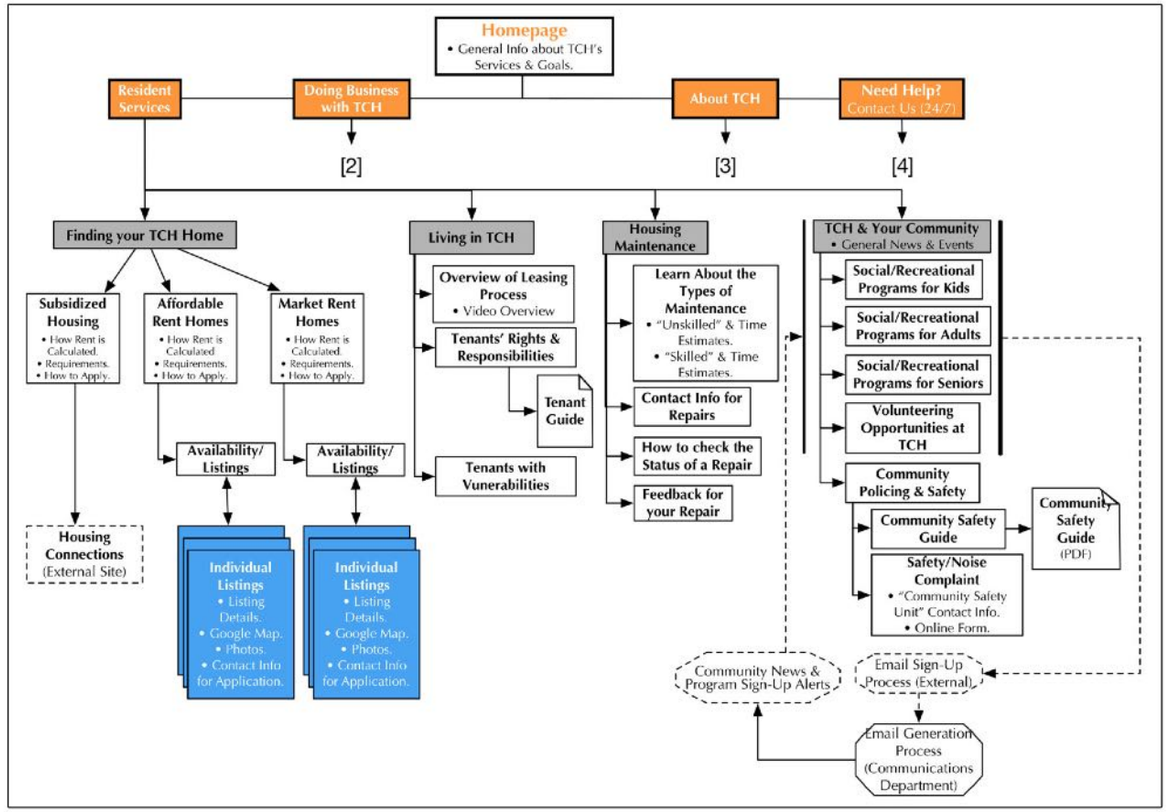
- Stakeholder & User Interviews, Surveys, & Research Findings.
- Heuristic Analysis & User-Interface (UI) Audit.
- Personas, Empathy Maps, & Content/ Feature Requirements.
- Card-Sorting, Information Architecture, & User-Flows.



Personas & User-Flows - Detailed deliverables that included a mix of qualitative/quantitative information were produced to keep the needs of users in mind, while examining how they would likely move through the website to find what they needed.



Sitemap Sketch from Card-Sorting Results



Refined Sitemap

Cart-Sorting & Tree-Testing - Card-sorting exercises were conducted with multiple users to help organize the website content into an appropriate mental model, then we confirmed this model with extensive tree-testing that resulted in a finalized information architecture.

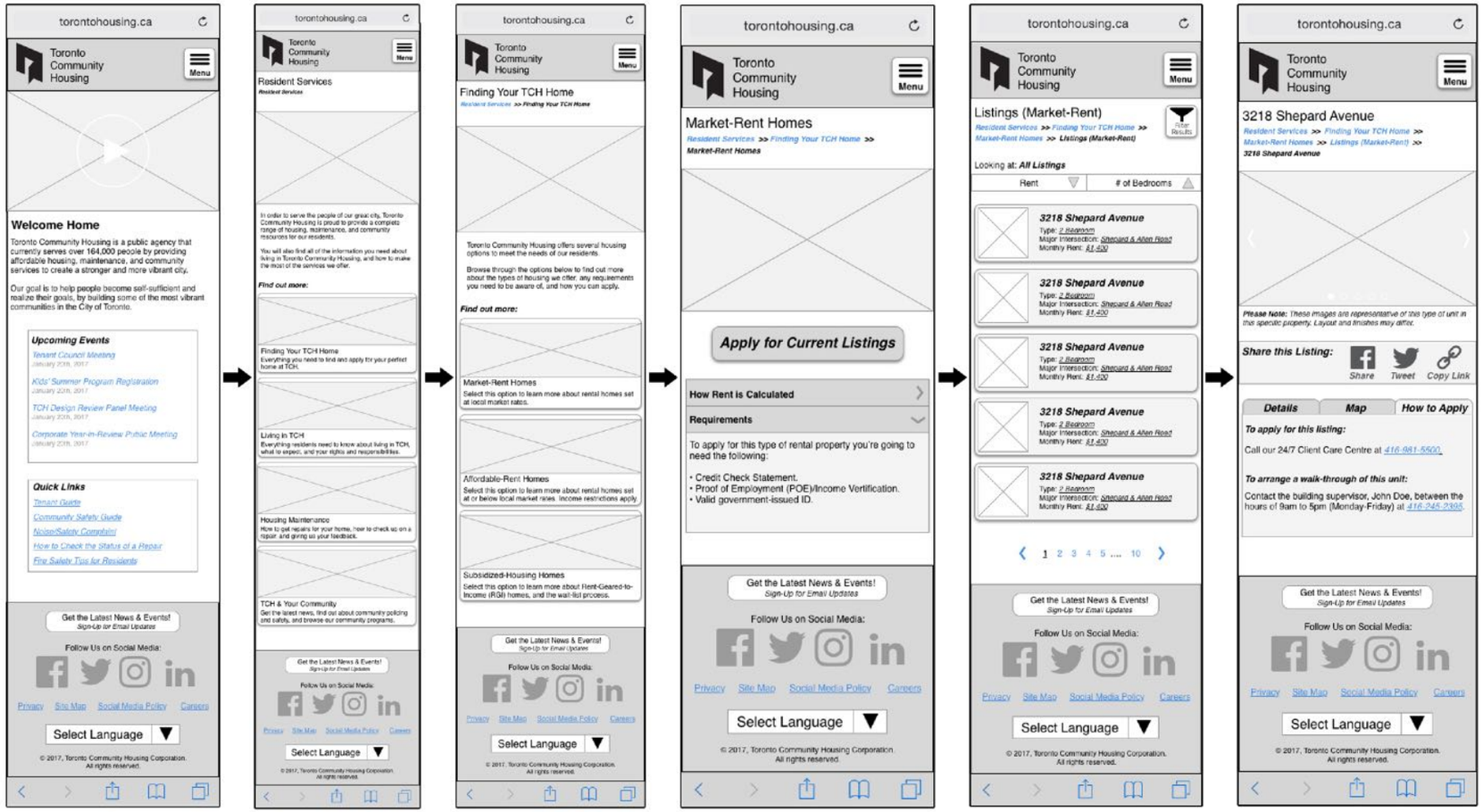
Design

With our research completed, we began wire-framing using pencil and paper sketches; this provided a quick, easy, and inexpensive way to play with ideas that were refined into a testable design.

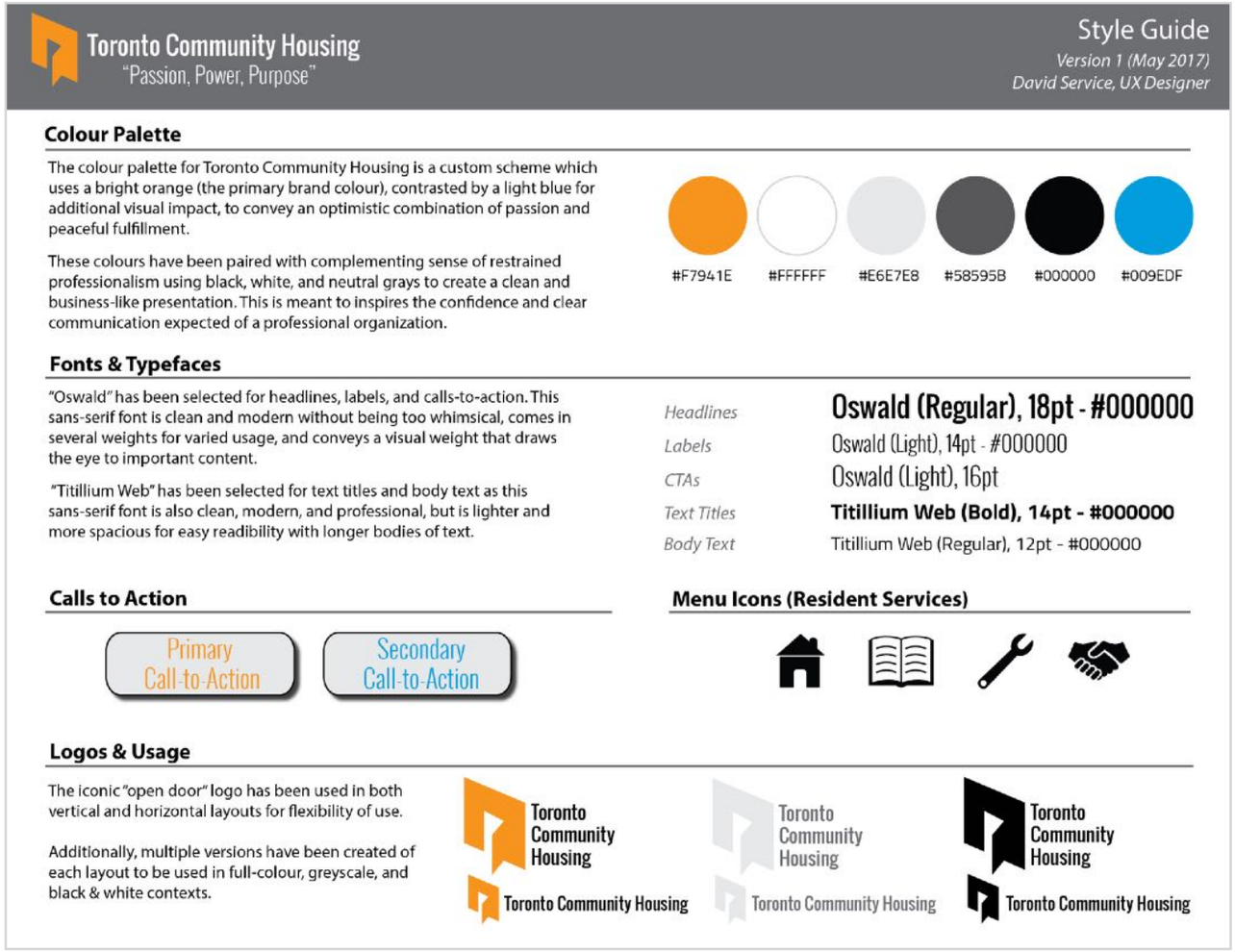
From there, we began to flesh out a style guide that communicated the desired brand message to tenants, business partners, and executive decision-makers.

Deliverables Included:

- Wireframe Sketches.
- Refined Wireframes.
- InVision Prototypes (for UserTesting).
- Style Guide.



Wireframes - Starting from a "mobile-first" design approach, detailed wireframes were produced and refined for each page (and device size), and through several iterations became the basis for the prototypes that followed.



Toronto Community Housing
"Passion, Power, Purpose"

Style Guide
Version 1 (May 2017)
David Service, UX Designer

Colour Palette

The colour palette for Toronto Community Housing is a custom scheme which uses a bright orange (the primary brand colour), contrasted by a light blue for additional visual impact, to convey an optimistic combination of passion and peaceful fulfillment.

These colours have been paired with complementing sense of restrained professionalism using black, white, and neutral grays to create a clean and business-like presentation. This is meant to inspires the confidence and clear communication expected of a professional organization.

#F7941E #FFFFFF #E6E7E8 #58595B #000000 #009EDF

Fonts & Typefaces

"Oswald" has been selected for headlines, labels, and calls-to-action. This sans-serif font is clean and modern without being too whimsical, comes in several weights for varied usage, and conveys a visual weight that draws the eye to important content.

"Titillium Web" has been selected for text titles and body text as this sans-serif font is also clean, modern, and professional, but is lighter and more spacious for easy readibility with longer bodies of text.

Headlines — Oswald (Regular), 18pt - #000000
Labels — Oswald (Light), 14pt - #000000
CTAs — Oswald (Light), 16pt
Text Titles — Titillium Web (Bold), 14pt - #000000
Body Text — Titillium Web (Regular), 12pt - #000000

Calls to Action

Primary Call-to-Action
Secondary Call-to-Action

Menu Icons (Resident Services)

Logos & Usage

The iconic "open door" logo has been used in both vertical and horizontal layouts for flexibility of use.

Additionally, multiple versions have been created of each layout to be used in full-colour, greyscale, and black & white contexts.

Toronto Community Housing
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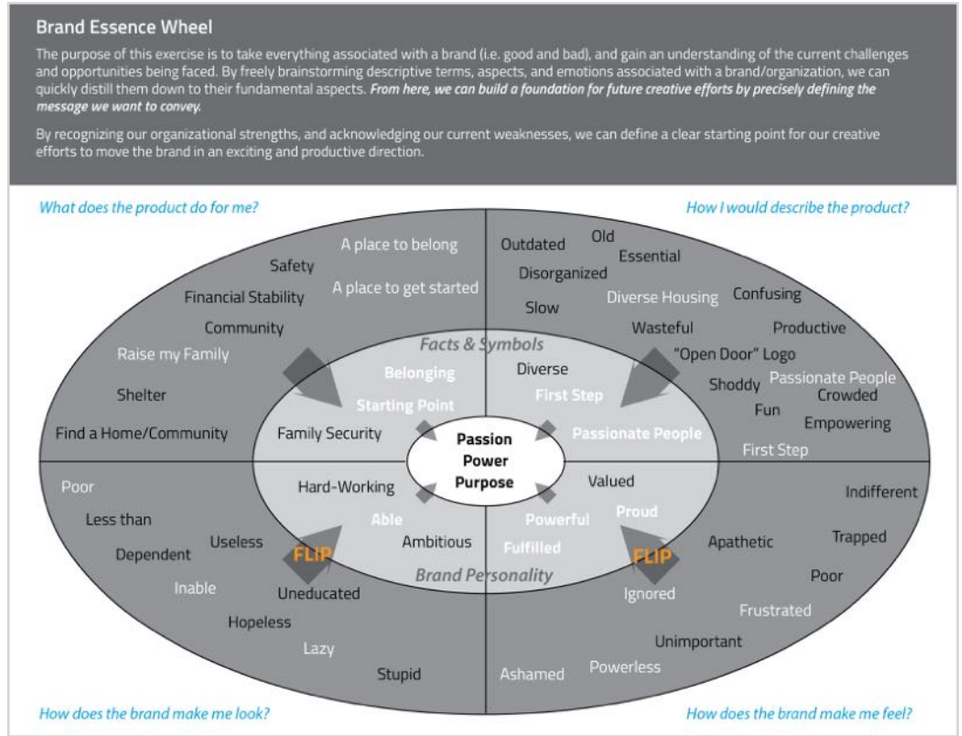


Simple Style Guide - A simple Style Guide document was produced to cover basic interface patterns and provide a specific focus for content strategy.

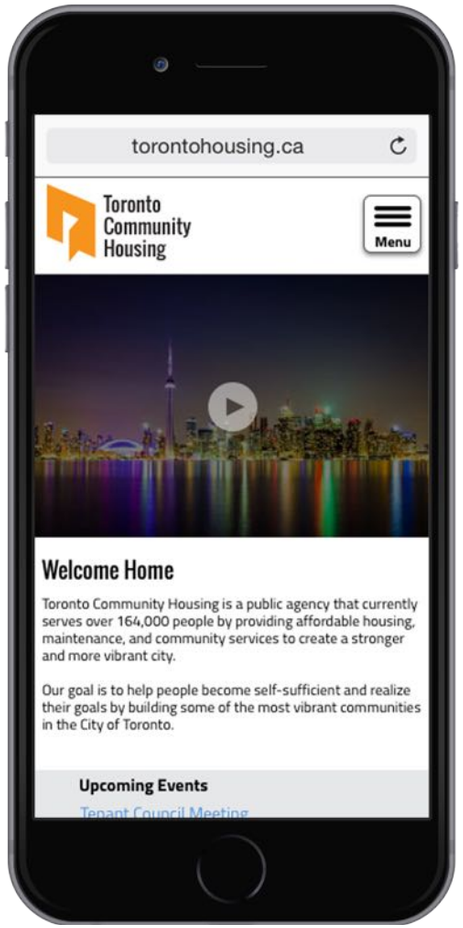
Testing & Validation

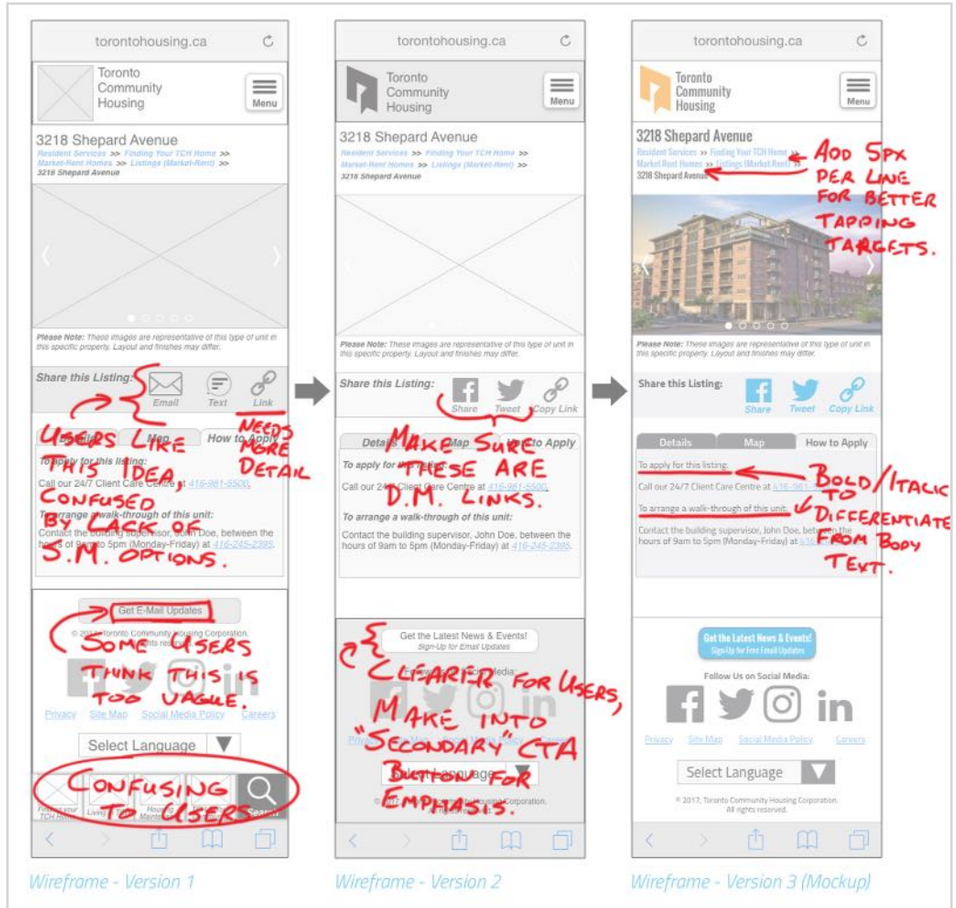
To keep the website re-design as user-friendly as possible, several rounds of usability testing were conducted as the prototype matured.

Starting with a wireframe-based version so that participants could focus on the structure, content, and functionality, several iterations were produced on the resulting feedback before visual styling was applied to the refined prototype.

Deliverables Included:

- User-Testing & User-Interface Refinements.
- Finished Design Mockups.
- High-Fidelity Prototype.





InVision Prototypes & Usability-Testing - Interactive Prototypes were used for on-going usability-testing to refine designs before they were submitted for development.

Thank you for your interest.

If you'd like me to help with your next project, or have any questions about my work, experience, or accomplishments, feel free to get in touch.

www.linkedin.com/in/david-service

david.service@icloud.com

215-421-6522

www.davidserviceux.com

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