



NICOLE FURI, SR. UX RESEARCHER/PRODUCT DESIGNER

USABLE JUNGLE LLC

2025 PORTFOLIO

Please Note:

My newer samples are under NDA, so these are mostly a bit older, however if you find you need to see something more relevant to your needs, just let me know and I can dig something up for you!



ABOUT ME

NICOLE FURI

I am based currently just outside of NYC. I technically own my own UX consultancy, Usable Jungle, which I started in the early '00s while traveling around the world and working remotely for a variety of US companies. For the past 10+ years though, I have been in full time roles working on enterprise and SAAS web and mobile applications as a UX researcher and designer with a focus on design systems, accessibility, and AI.

In my free time, I still try to travel as often as possible, as well as practicing yoga regularly, being involved in animal rescue, and curating art. I live alone with my two kitties- Caterpillar and Sylvester.

CASE STUDIES

1 EXPERT VISIT MOBILE APP

2 INVOICE PAYMENT APPLICATION

3 SALES PREDICT MOBILE APP

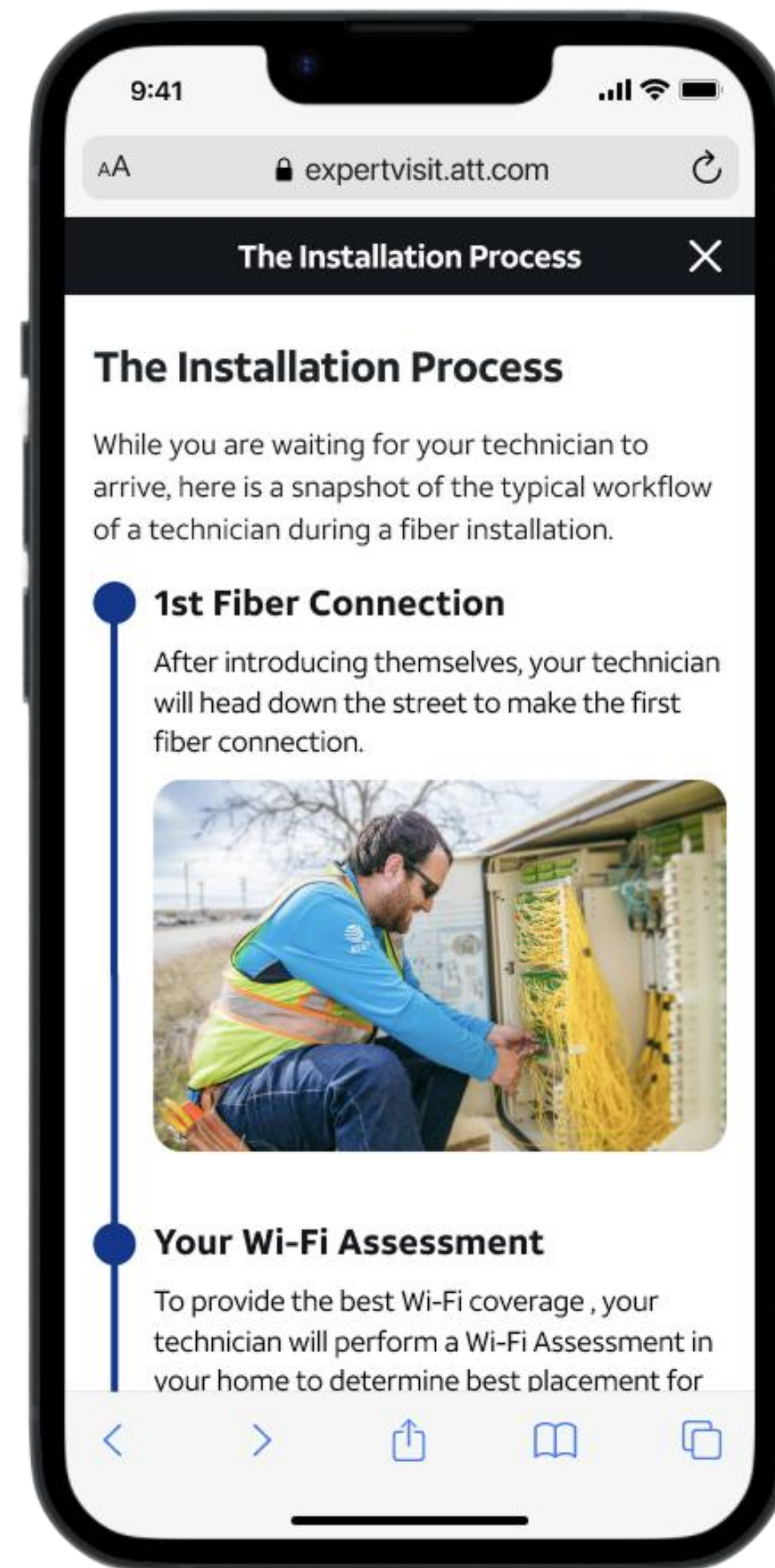
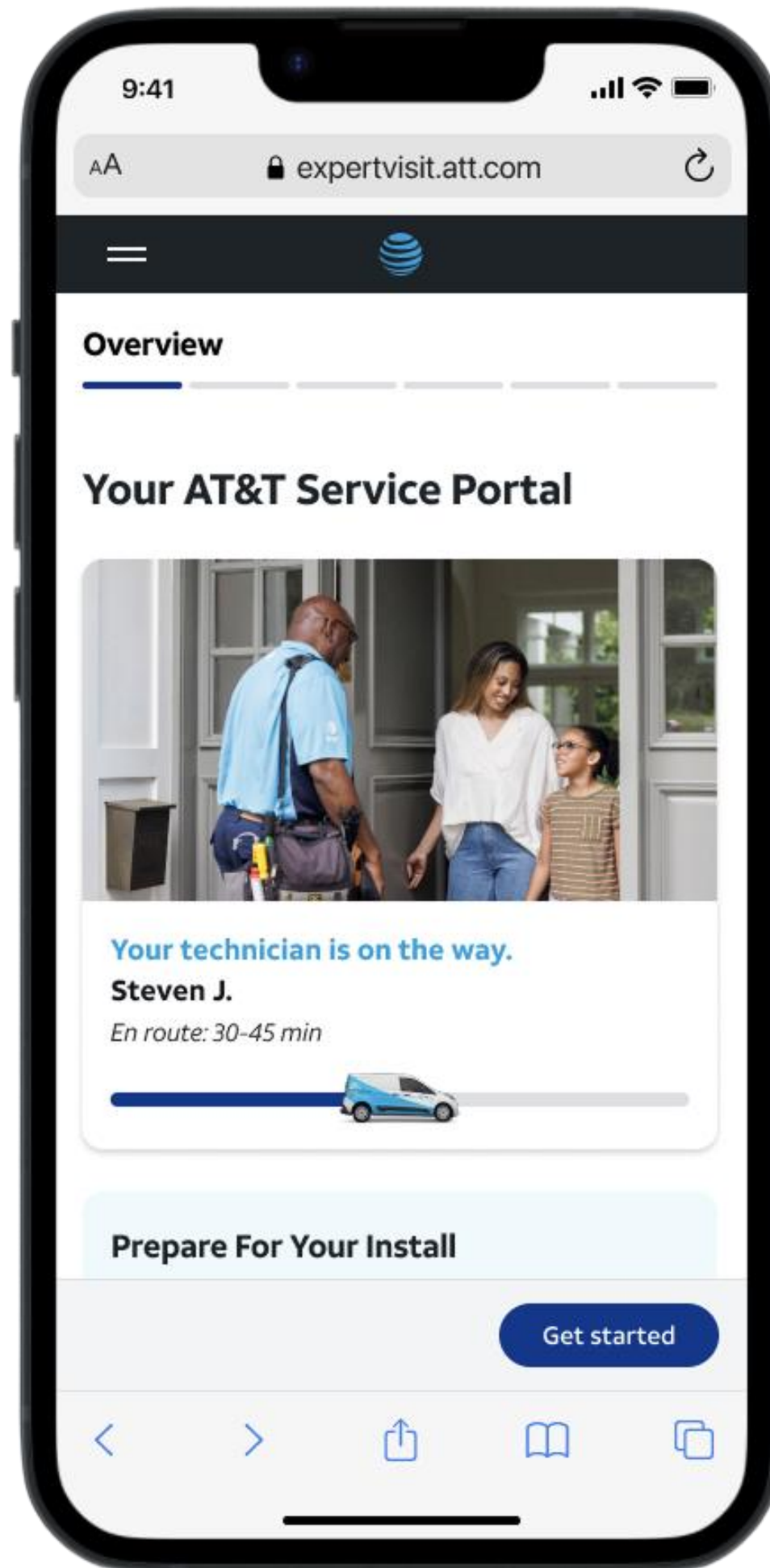
1

PROJECT: EXPERT VISIT MOBILE APP

CLIENT: AT&T



In this role I was tasked with the UX/UI design of the customer-facing mobile-optimized web application which enabled communication between technicians in the field and customers, to help both understand how best to optimize their fiber installation.



EXPERT VISIT

WEB/ MOBILE APP

Project: Conceptual design of an application to enable communication between a fiber technician and a customer during installation appointments. The app was intended to collect the necessary information from the customer to ensure a successful visit, educate them on what to expect from the process, and offer a quick and easy way to communicate with the technician and view the results of wi-fi connection tests, as well as to promote wi-fi extenders as an option to help improve signal strength. The audience was made up of millions of users throughout the US.

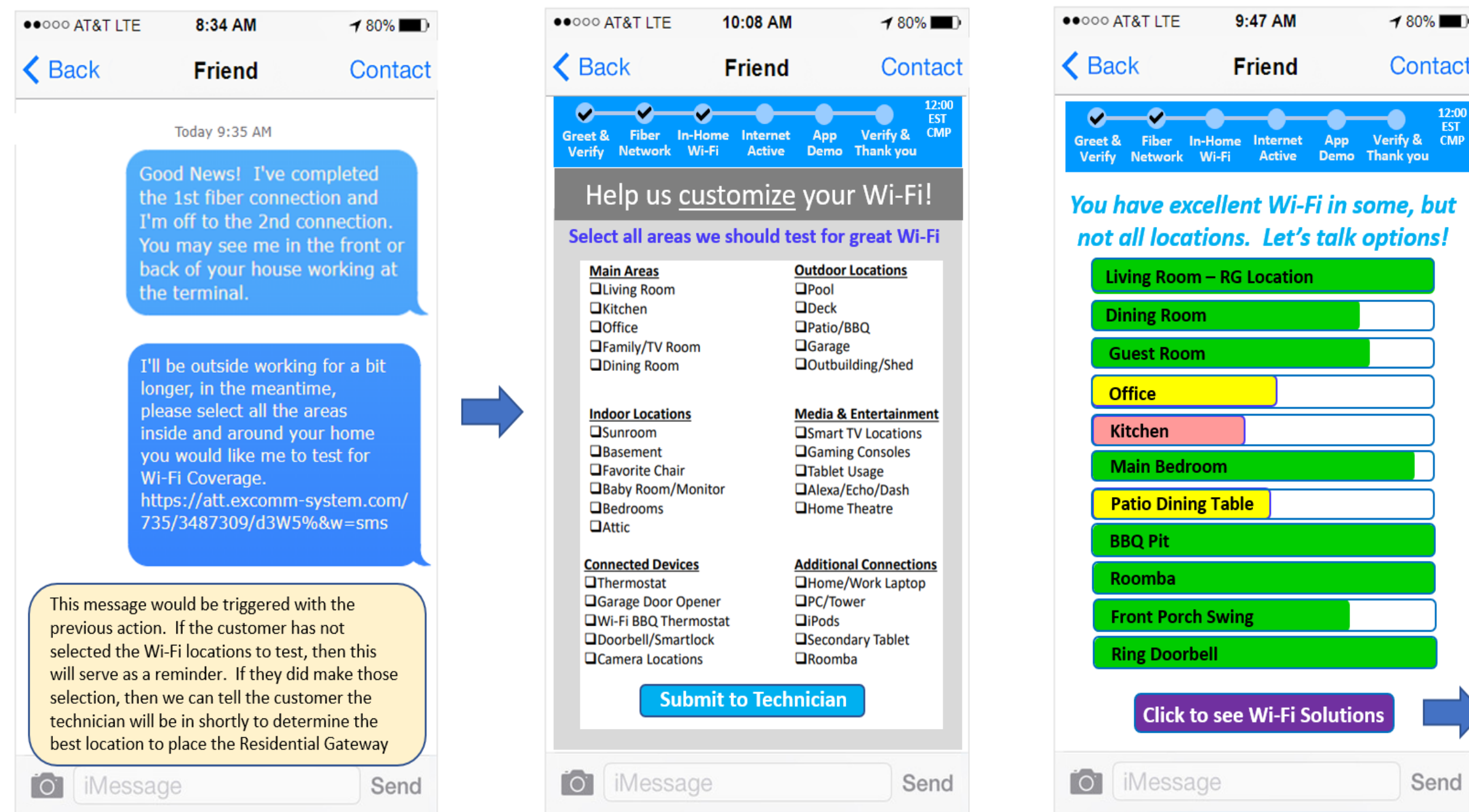
Problem: Communication between technicians and customers was often asynchronous and disjointed, and customers felt they did not have enough information to base decisions on regarding their fiber installation.

My role: I managed the customer-facing UX and UI design of the mobile/web version. There was a counterpart native iOS application on the technician side that contained a lot of common elements.

Environment: Large enterprise R&D team with abundant resources.

UX STRATEGY

REQUIREMENTS ANALYSIS



My first step was to meet with the “triad” of Design, Product Management, and Development, along with other major stakeholders, to extrapolate the business goals, project requirements, audience profiles, and the technical environment for the project. The app’s ecosystem included the SMS communications between the customer and the technician, the web “portal” application targeted towards the customer (my domain), and the iOS native mobile application used by technicians to track the installation process.

We defined the problem to solve for MVP (how best to visually communicate the status of a fiber installation and options for optimizing it), as well as the metrics to measure success. We initially ideated with some rough sketches of the proposed content on mobile.

I could then do a gap analysis to see what needed information was missing, and how much of it I could garner from research.

UX RESEARCH

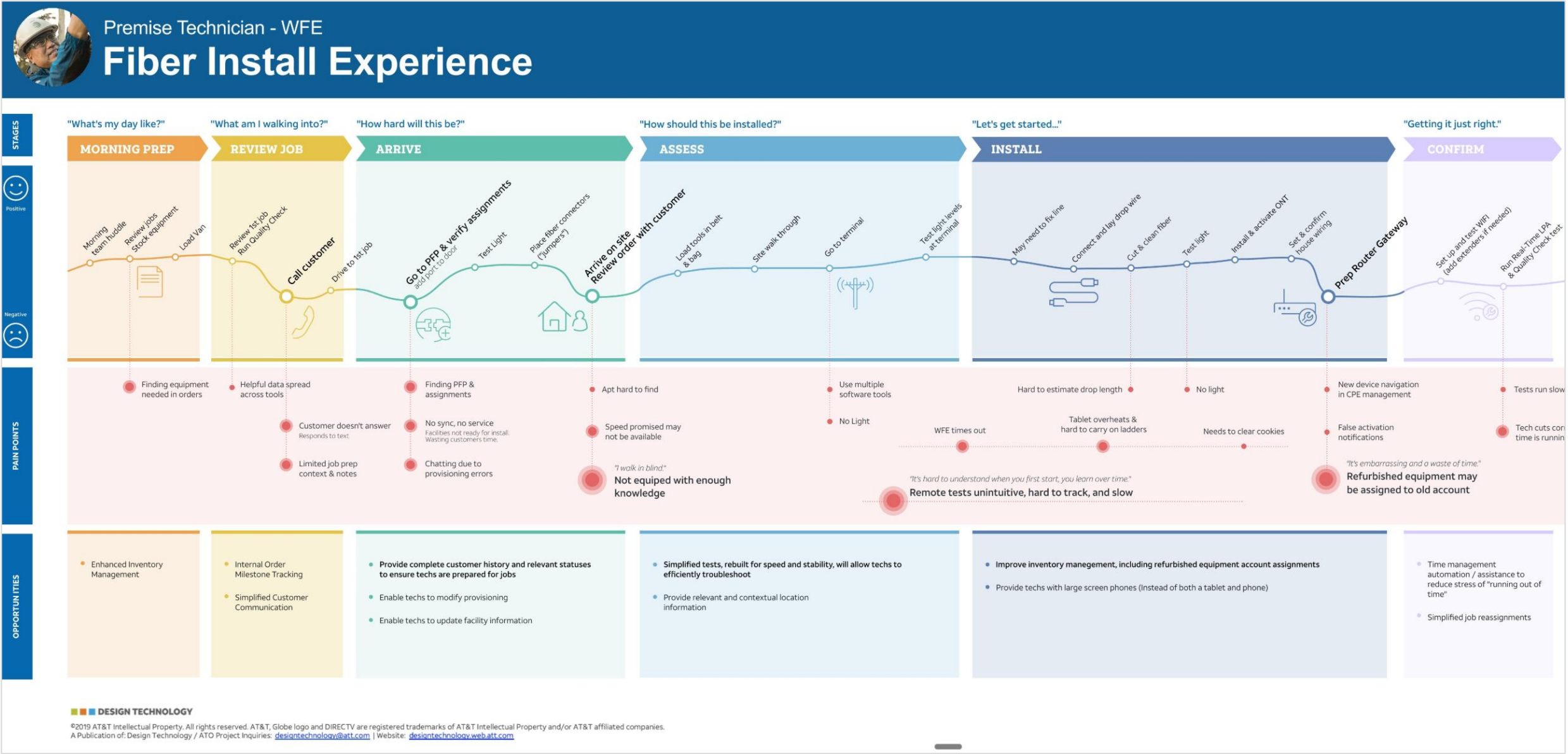
DISCOVERY & ANALYSIS



AT&T had a separate UX Research team, which had performed a variety of studies to derive an understanding of the entire installation experience, on both the customer and technician sides.

My job was to collect the resulting feedback, and do an analysis of the insights inherent, in order to most effectively guide the customer through the installation process and collect the needed information from them which assisted the technician in doing their job effectively.

Research assets included survey results, interview recordings, journey maps, and quantitative data from analytics tools. I used AT&T’s proprietary AI assistant to help consolidate feedback and extract insights.

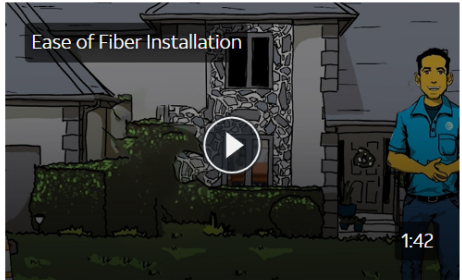


Learn about AT&T Fiber installation

Getting started with AT&T Fiber takes a little time—but with blazing-fast internet speeds, you'll appreciate the effort!

Ease of Fiber Installation

This short video explains how easy and hassle-free it is to get AT&T Fiber. The video explains and illustrates what to expect logistically to coordinate the set-up appointment, the actual installation process, and the requirements of the customer on the install day.



AT&T Fiber installation

Professional technician

AT&T Fiber® may require a technician to come to your home, even if you have other AT&T services. Fiber requires different types of cable and equipment, so the technician will upgrade the internet lines to your home. This ensures that you have our most up-to-date fiber technology.

Installation time

It takes four to six hours to install AT&T Fiber. This may include replacing existing copper wiring with new fiber lines to provide you with our best internet experience.

Equipment

Issues/confusion during Install (8%) 35/424

- A few customers felt there wasn't any communication from their tech
- Confusion around tech leaving the home
- Had a bad experience with their install (damage, sloppy work, exposed wires)
- "The installation took the entire day and there were several times the tech left and I had no idea if he was coming back."

Equipment Placement Expectations - (10/424 - 2%)

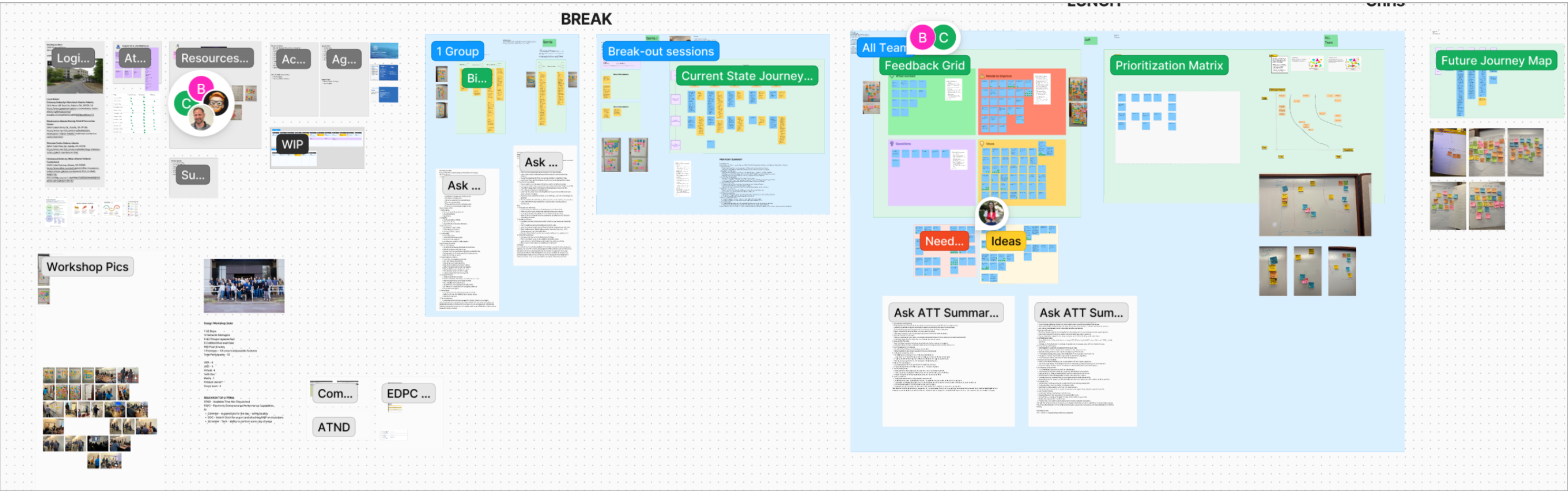
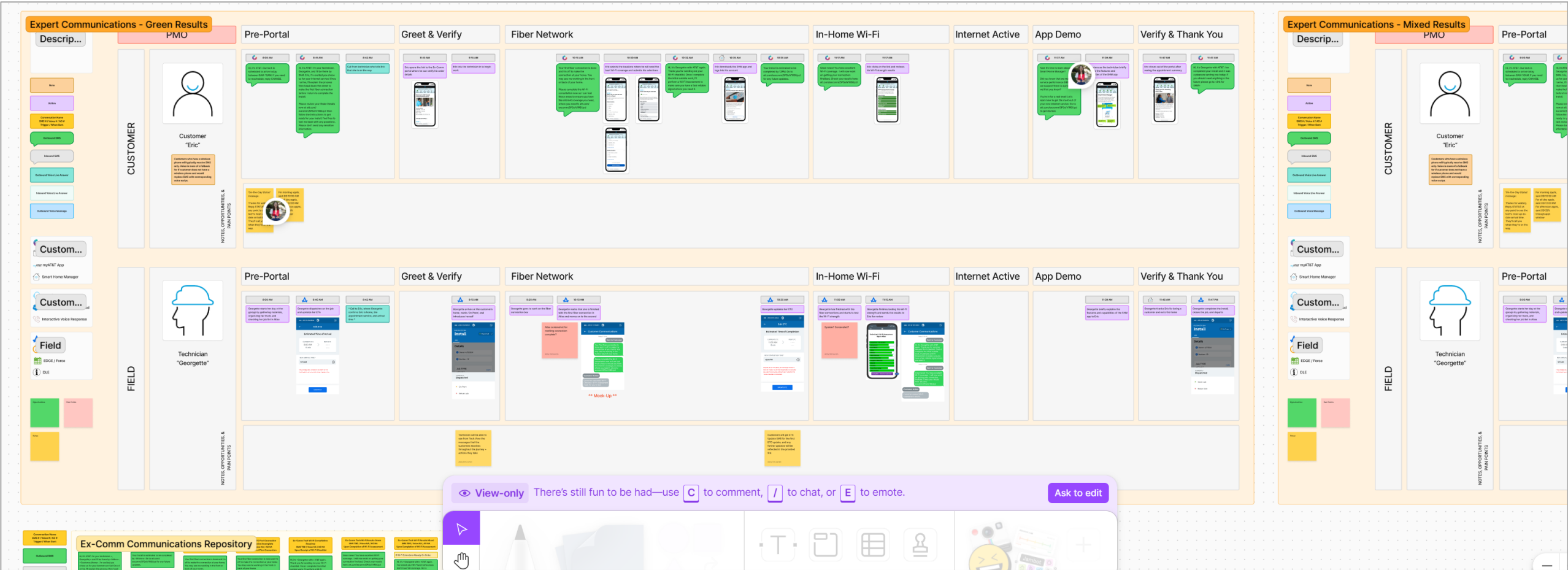
- Router location placement not communicated well
- Router/Equipment placement in home
- "Did not realize that technician would have to install modem in an unwanted location because fiber wire has to be buried in ground and thus my main computer is now no longer hardwired in"
- Opportunity:
 - a. Have customer agree to equipment placement prior to install

UX RESEARCH

COLLABORATION








Additionally, I worked with dedicated UX researchers from a parallel team, to learn more about AT&T in general, and the workflows of the different types of technicians, as well as the needs and goals of their customers, in a series of workshops held virtually and working in Figjam.

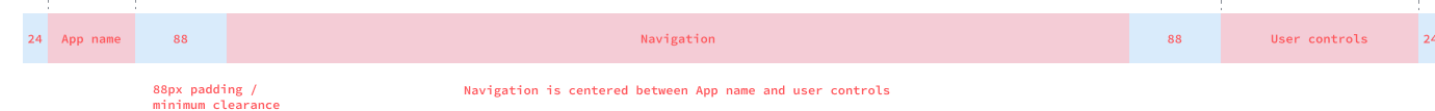




Never have only 1. Used with smaller apps that have a minimum of 2 and maximum of 3 links. Greater than 3, use secondary bar navigation.

Keep minimum label length. Topbar is fixed to top and always visible on scroll.


[Alternative Work Engine](#)
[Construction Ticket Tool](#)
[DEG Assist Handoff Tool](#)








[Business Services Express Ticketing](#)
[Alternative Work Engine](#)
[Construction Ticket Tool](#)
[?](#)
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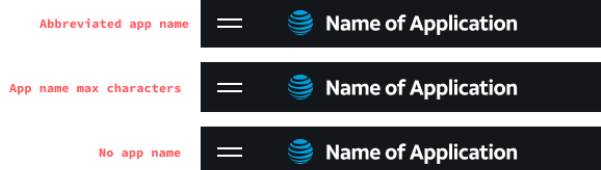














Business Services Express Ticketing

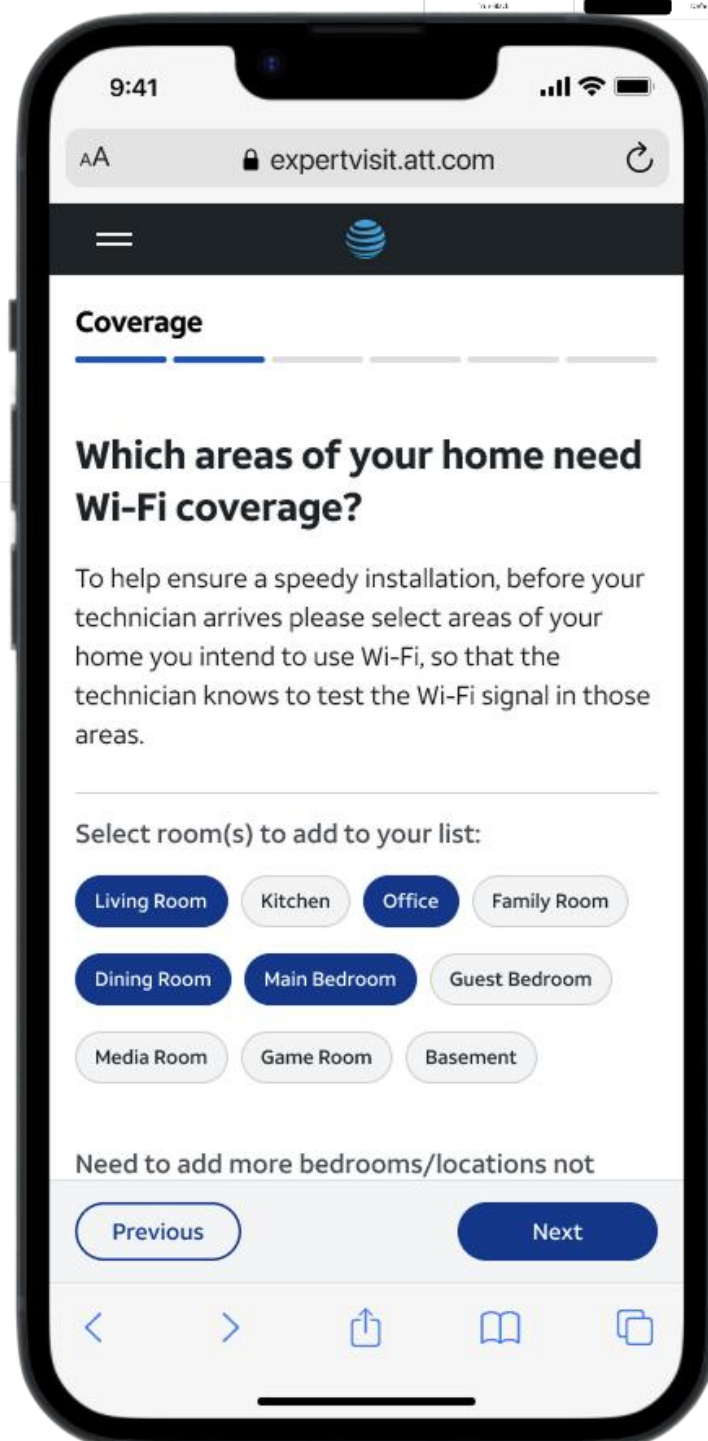
Business Services Express Ticketing

 EN



Edge to edge center

| Base colors used in AT&T Fleet apps | | | | | |
|-------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------|---------|--------------------------|--|
| Test | | | | | |
| Base color | Color | Hex code | HEX | Color name | |
| Default |  | primary color for text and background | #000000 | Black (aka #000000) | |
| Primary |  | main color for buttons and links | #0070C0 | Blue (aka #0070C0) | |
| Secondary |  | used for secondary buttons and links | #BDD7EE | Light Blue (aka #BDD7EE) | |
| Dark |  | used for dark buttons and links | #003366 | Dark Blue (aka #003366) | |
| Grey |  | used for grey buttons and links | #A9A9A9 | Grey (aka #A9A9A9) | |
| Dark Grey |  | used for dark grey buttons and links | #666666 | Dark Grey (aka #666666) | |
| Red |  | used for red buttons and links | #CC0000 | Red (aka #CC0000) | |
| Green |  | used for green buttons and links | #008000 | Green (aka #008000) | |
| Yellow |  | used for yellow buttons and links | #FFD700 | Yellow (aka #FFD700) | |

[illegible][illegible][illegible][illegible]

UX DESIGN

DESIGN SYSTEM COMPONENTS

The next step was to take inventory of the different components needed for the interactions inherent in the application and start to pull them from the design library to build screens in Figma.

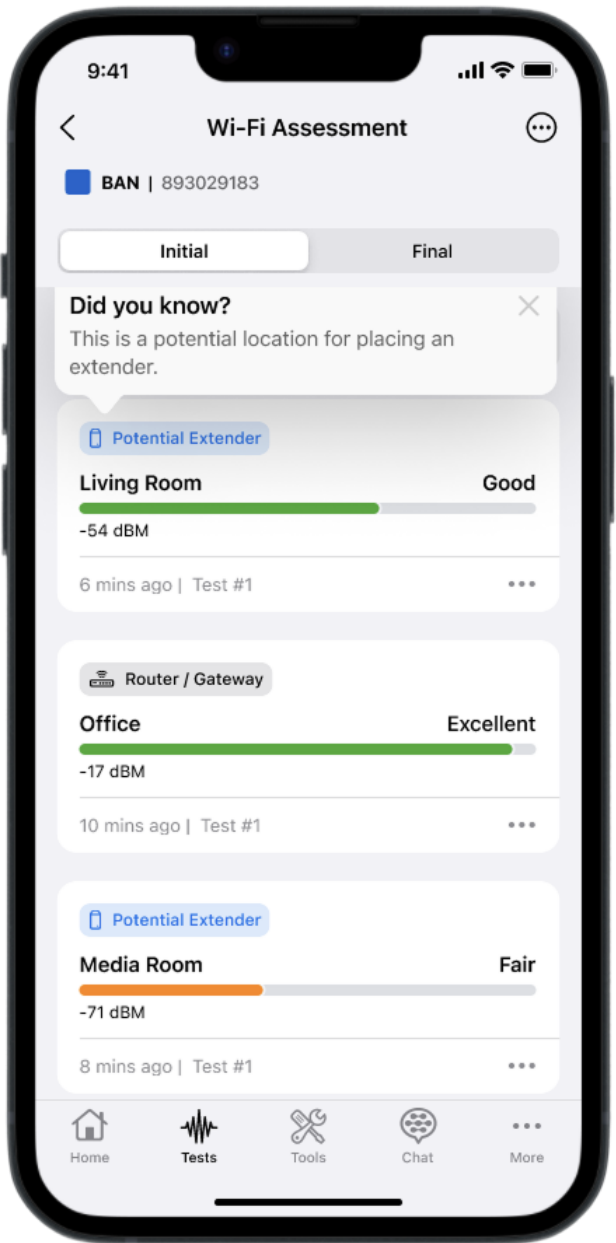
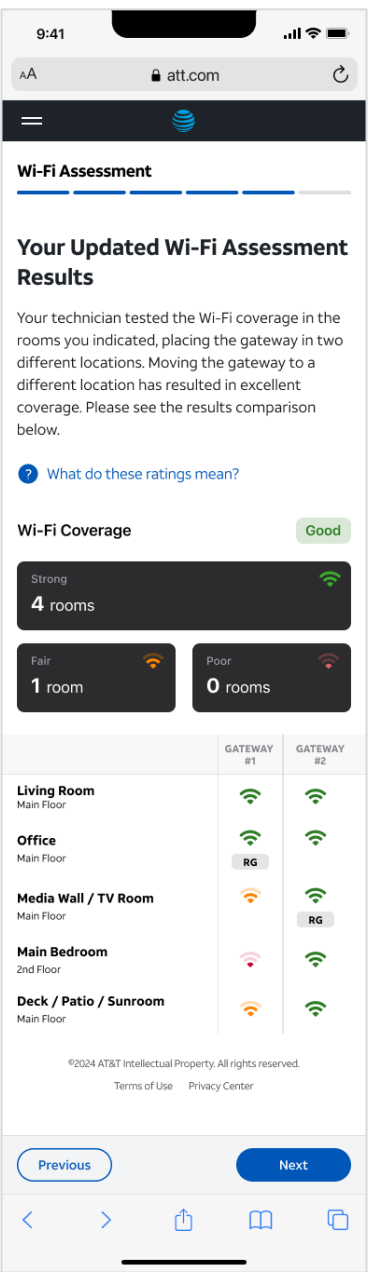
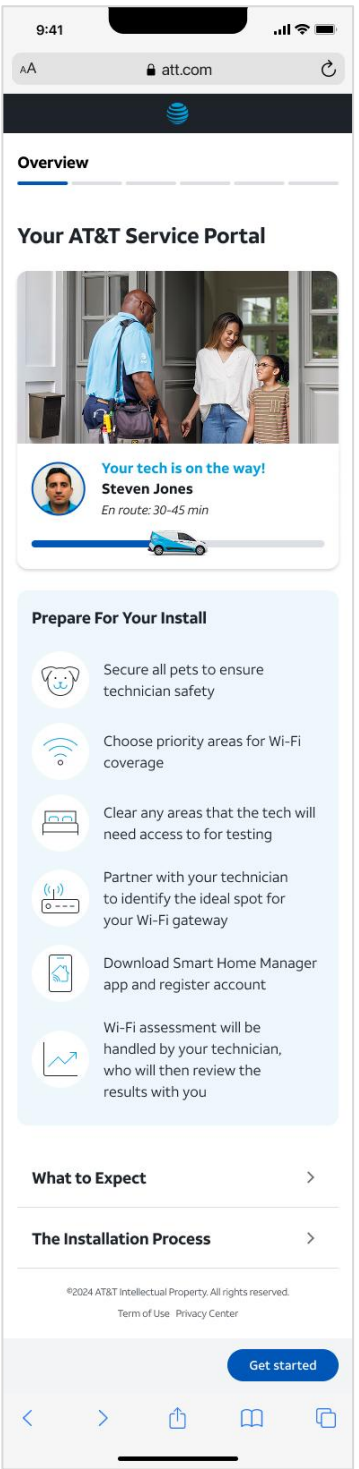
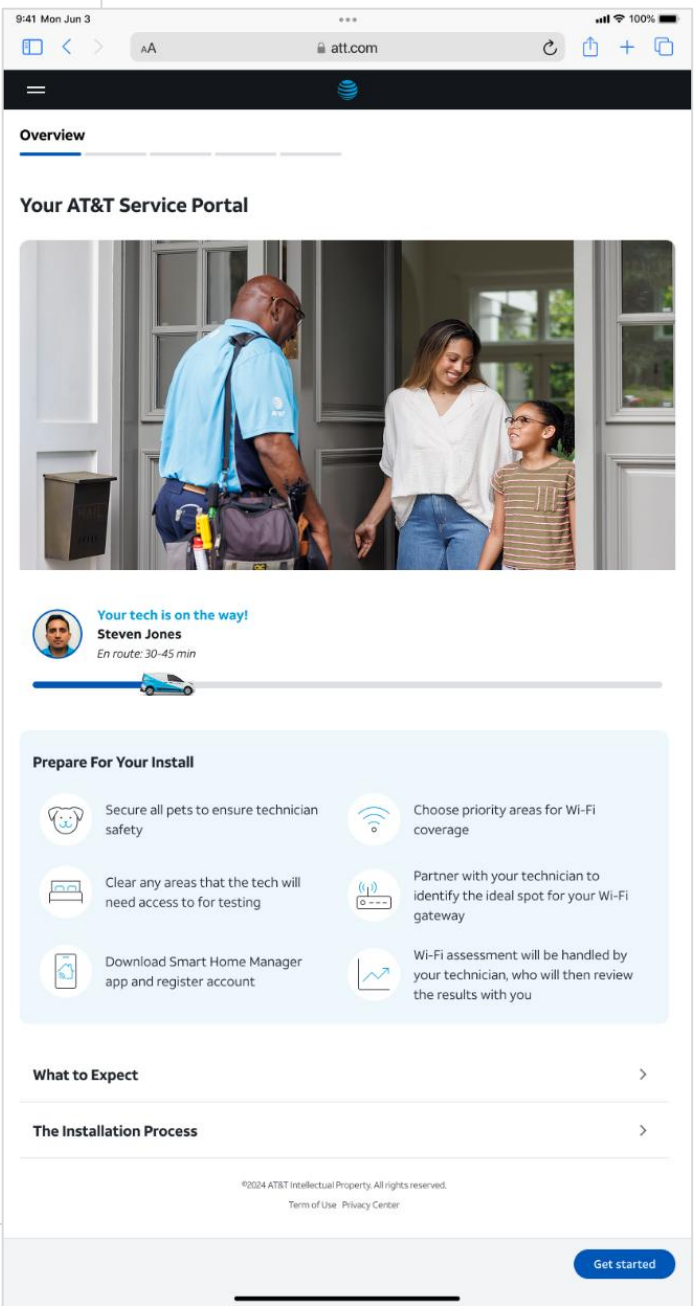
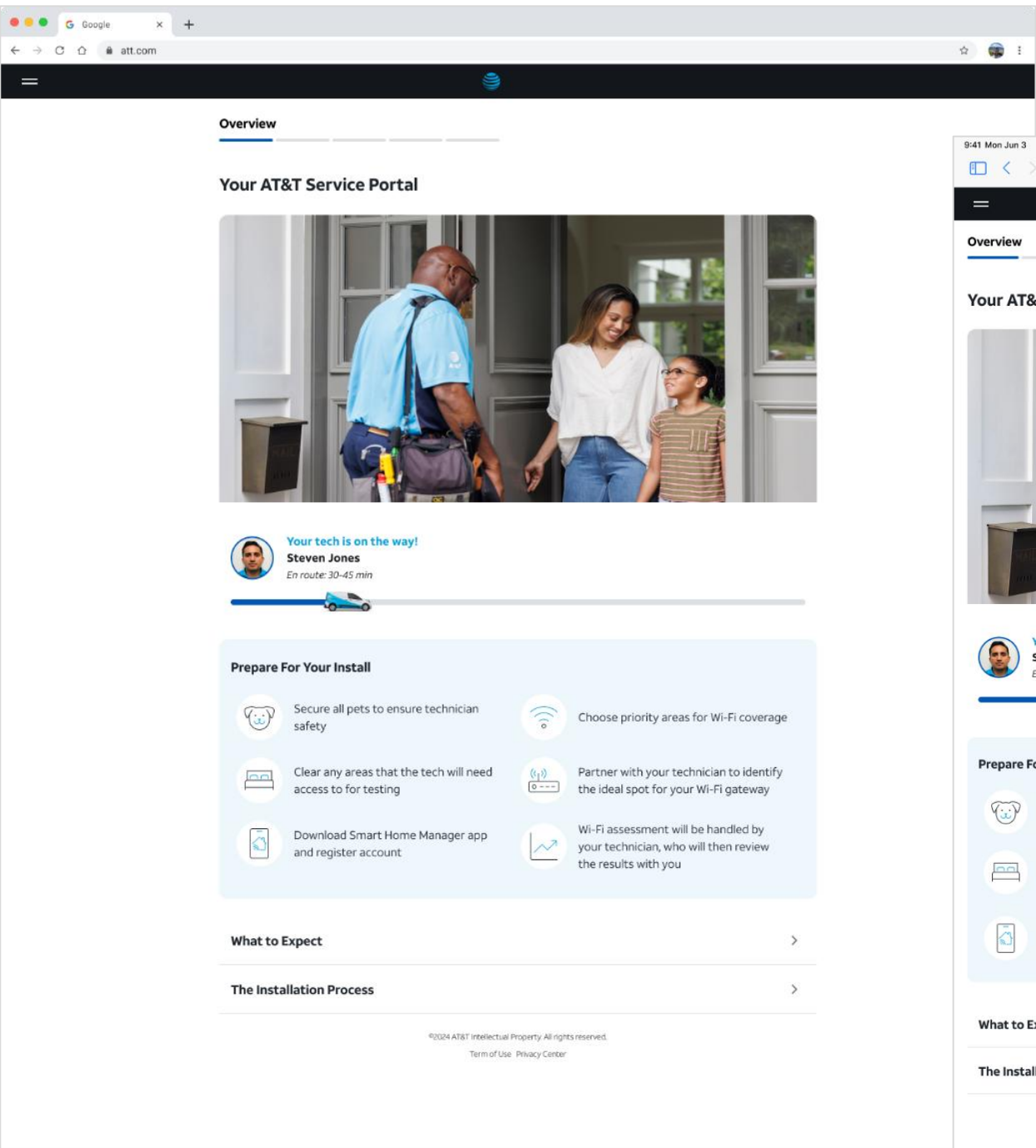
When there was not yet an existing component available for a particular need, I would create one and submit it to the governance team to vet for adherence to standards and accessibility, and approval to add to the library, then would work with the front end developers to translate the component to code for implementation.

UX DESIGN ITERATION & PROTOTYPING

In this phase I mocked up the screens in the agreed upon user flow for each device size and created a clickable prototype to run past the stakeholders and representative users for feedback, then applied that feedback to revisions of the screens.

[View initial testing prototype](#)

I also collaborated with the designer who owned the native mobile app on the technician's side, to ensure that we were keeping a parity of experience between the two.



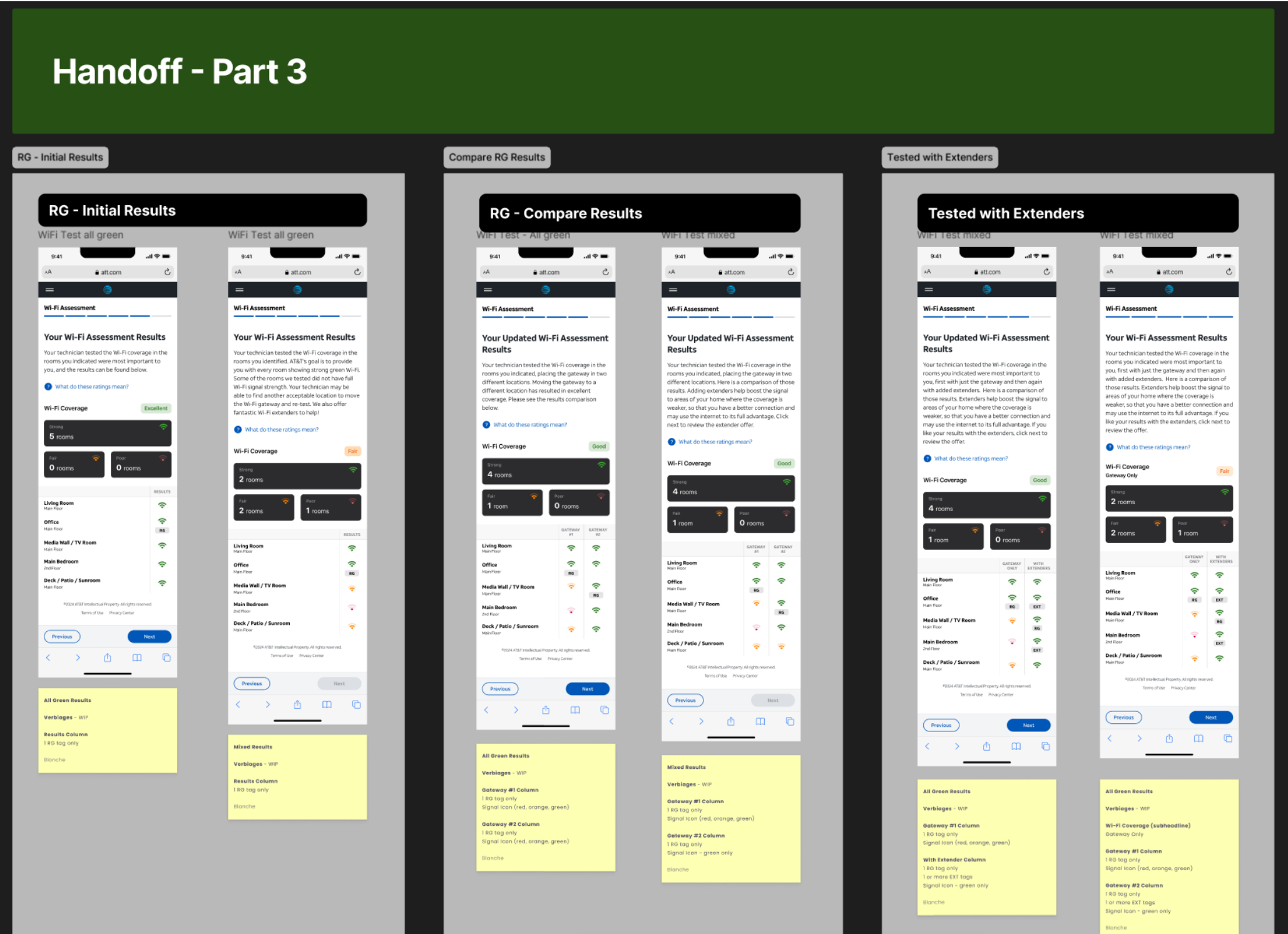
IMPLEMENTATION

HANDOFF AND TESTING

Finally, I worked with the development team in an Agile context, in sprints, pulling a set of user stories from Jira to work on, and handing off finalized screens for each story, for implementation.

Once the developers had done their part, I would do a design review to ensure the screens looked the way we had intended, and I would help test the coded prototype on a staging server, until release.


This project is ongoing, so after the first MVP release, the whole process started back over again with more research to put towards the next release.



PRODUCT SUITE

AT&T ENTERPRISE INTERNAL TOOLS

Expert Visit was just one of the applications I designed during my time with AT&T.


Fleet Vendor Web

Service Orders

Invoices

?

🔔

👤

Service Orders

Open service orders are listed below. To search the list, type your criteria into the search box below. You may also click on Advanced Search for more search options.

Search by:

☒ Service Order
 ☐ Invoice

Advanced Search

↺

\$

Garage Info

×

Lubbock Vended - TX015A

8302 Ave. P,

Lubbock, TX

79423-1548

Task Codes

Export

Print

< Prev

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Next >

| Order # | Vehicle | Create Date | Service Requested | Vendor ID | Status | Actions | |
|----------------|---------|---------------|---------------------|------------------------|---------|------------------------------------------------------------------------------------------------------------------------|---------------------------|
| 3218-220524-01 | TX015A | 5300165-P11-1 | 05/31/2012 09:13:13 | RD Service Primary | MI149AA | Open | <div>👁</div> <div>⋮</div> |
| 3213-229216-01 | CA0057 | 2001128-212 | 05/31/2012 09:13:13 | Battery R&R | MI149AA | Open | <div>👁</div> <div>⋮</div> |
| 3215-228654-01 | LA184 | 1030094-299 | 05/31/2012 09:13:13 | Tires | MI149AA | <div> <div>Update estimate</div> <div>Complete Work</div> <div>Manage Card Payment</div> <div>Print Order</div> </div> | <div>👁</div> <div>⋮</div> |
| 3214-254987-01 | TX015A | 1030094-299 | 05/31/2012 09:13:13 | Brakes | MI149AA | | <div>👁</div> <div>⋮</div> |
| 3213-265478-01 | CA0057 | 1030094-299 | 05/31/2012 09:13:13 | Suspension | MI149AA | | <div>👁</div> <div>⋮</div> |
| 3212-654789-01 | LA184 | 1030094-299 | 05/31/2012 09:13:13 | Body Repair | MI149AA | | Open |
| 3211-265497-01 | TX015A | 1030094-299 | 05/31/2012 09:13:13 | Automatic Transmission | MI149AA | Open | <div>👁</div> <div>⋮</div> |
| 3210-524987-01 | CA0057 | 1030094-299 | 05/31/2012 09:13:13 | Battery R&R | MI149AA | Open | <div>👁</div> <div>⋮</div> |

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Next >

Need help?

If you need assistance please contact the AT&T Fleet Operations call center at 1-888-254-5355, or email M34699@att.com.

DEVELOPED BY



AT&T Proprietary (Restricted) authorized individuals only

9:41

Good Morning,

Alexander

3.11.24

APo WIRE

Read Now

Today's Tasks

All Dispatched Assigned Closed Ret

BAN: 304938558 Assigned

Install

U-VERSE

Due on 11/20/23

Hazard Reported

8:00 AM - 11:00 AM

8412 High Oak Dr, Suite 123
Spring Hill, TX 78221

BAN: 667984453 Assigned

Repair

Fiber

2:00 PM - 5:00 PM

223 Riverside Dr

Outage Tracker

Outage Search

?

← Outage Detail

| OUTAGE ID | PENDING | TOTAL | REGION | STATE |
|-------------------|---------|-------|--------|-------|
| 2020-056-VRAD-016 | 0 | 40 | --- | --- |

Notes: ---

There are 4 other outages in the same CO CLLI. [Click to view](#)

Close Outage

Outage Dispatch Detail

Outage Listener

Outage Log

AOD History

Select 1 or more checkboxes to edit the status using the dropdown.

Set Status to (select) ▼

Save

Enter criteria to filter results

Export

| <input type="checkbox"/> BAN | CRM | WRID | TARGET | RCV |
|-----------------------------------|-----------|------|----------------------|-------------|
| <input type="checkbox"/> 12281883 | L57602684 | --- | IPLCINXX---01CAB101B | 09-19 17:22 |
| <input type="checkbox"/> 12281883 | L57602684 | --- | IPLCINXX---01CAB101B | 09-19 17:22 |
| <input type="checkbox"/> 12281883 | L57602684 | --- | IPLCINXX---01CAB101B | 09-19 17:22 |
| <input type="checkbox"/> 12281883 | L57602684 | --- | IPLCINXX---01CAB101B | 09-19 17:22 |

9:41 Mon Jun 6

AT&T fiber

Intro

Fiber Availability Map

Fiber Plans

So much to love about Fiber!

The choice is simple

There's never been a better time to switch! See how AT&T stacks up against the competition.

| | AT&T fiber | Spectrum |
|----------------------------------|----------------|----------------|
| Fastest speed available | 5 GIG INTERNET | 1 GIG INTERNET |
| 100% Fiber Network | ✓ | ✗ |
| Equal upload and download speeds | ✓ | ✗ |
| Unlimited internet data included | ✓ | ✓ |
| Equipment fees included | ✓ | ✓ |

Fleet Vendor Web

Invoices

Manage Invoice(s)

Unpaid invoices are listed below. To search the list, type your criteria into the search box below. You may also click on Advanced Search for more search options.

Search by:

Service Order

Invoice

123

Advanced Search

Export

Print

Showing 8 of 10 records for entered criteria

< Prev

Page 1 of 10

Next >

| Invoice Number | Actions |
|----------------|-------------|
| 3218-220524-01 | <div></div> |
| 3213-229216-01 | <div></div> |
| 3215-228654-01 | <div></div> |
| 3214-254987-01 | <div></div> |
| 3213-265478-01 | <div></div> |
| 3212-654789-01 | <div></div> |

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Need help?

If you need assistance please contact the AT&T Fleet Operations call center at 1-888-254-5355, or email M34699@att.com.

100%

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Authorized individuals only

9:41

mWorkforce

<

IPAD PRO

Verify Info

Recipient

ATTN: Steve Bradford

>

Shipping Address

22 E. Chicago Ave., Chicago IL 60611

>

My Contact Info

Phone

555-555-5555

>

Email

name@email.com

Broken Device

Model

iPad Pro

Current iOS

3.15

>

Asset ID

41074

Serial Number

Send H

INVENTORY

REPO

TEO Scheduler

TEOs

Quick Links

Create New

My TEOs

Search TEOs


All Active TEOs

☐ View past due TEOs

Type to filter below

| TEO NUMBER | OFFICE/CLLI | |
|------------|-------------|--|
| 287375 | ALPRGAED | |
| 287375 | ALPRGAED | |
| 287375 | ALPRGAED | |
| 287375 | ALPRGAED | |
| 287375 | ALPRGAED | |
| 287375 | ALPRGAED | |
| 287375 | ALPRGAED | |
| 287375 | ALPRGAED | |

DEVELOPED BY



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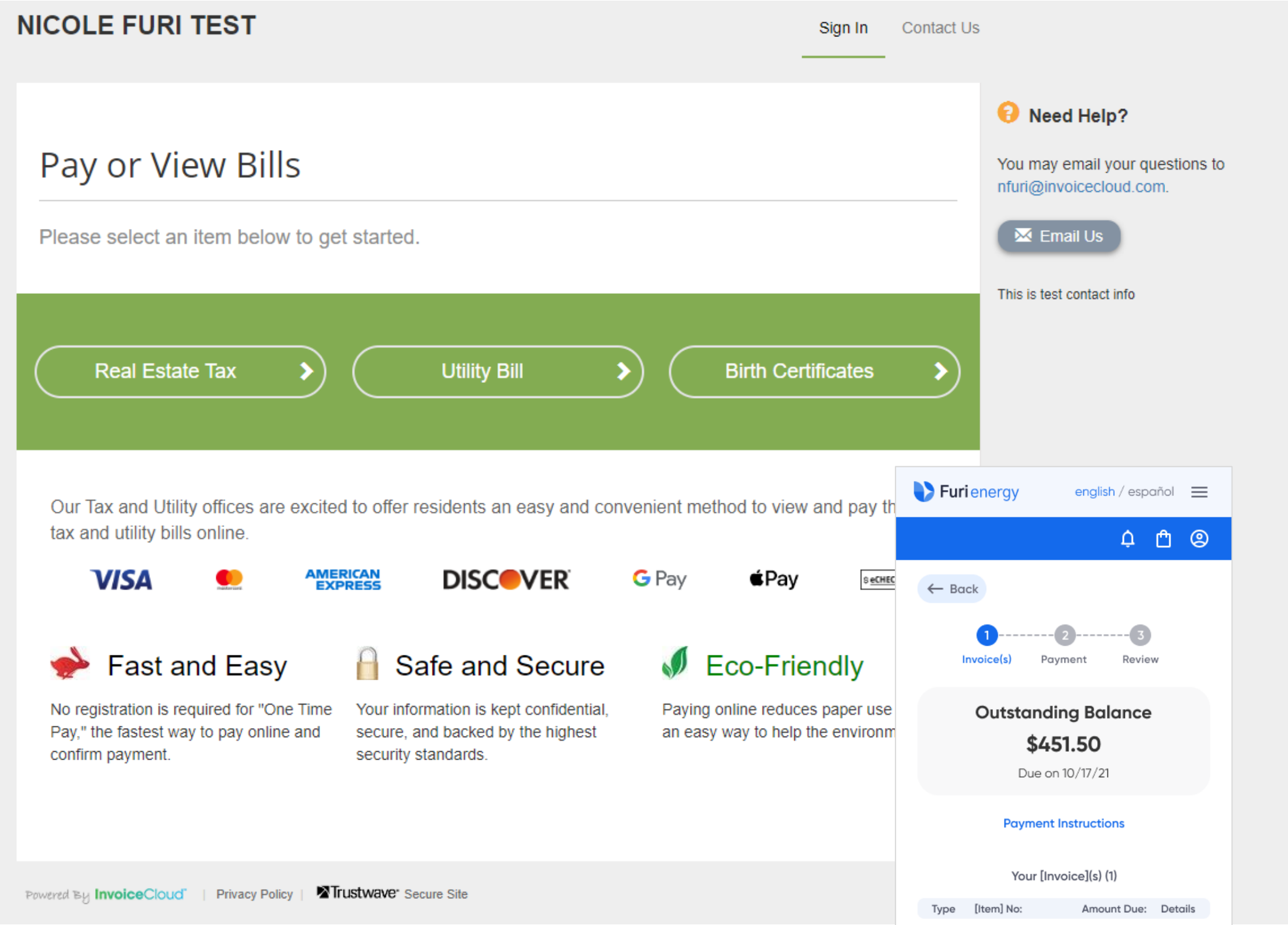
PROJECT: INVOICE PAYMENT APPLICATION

CLIENT: INVOICE CLOUD

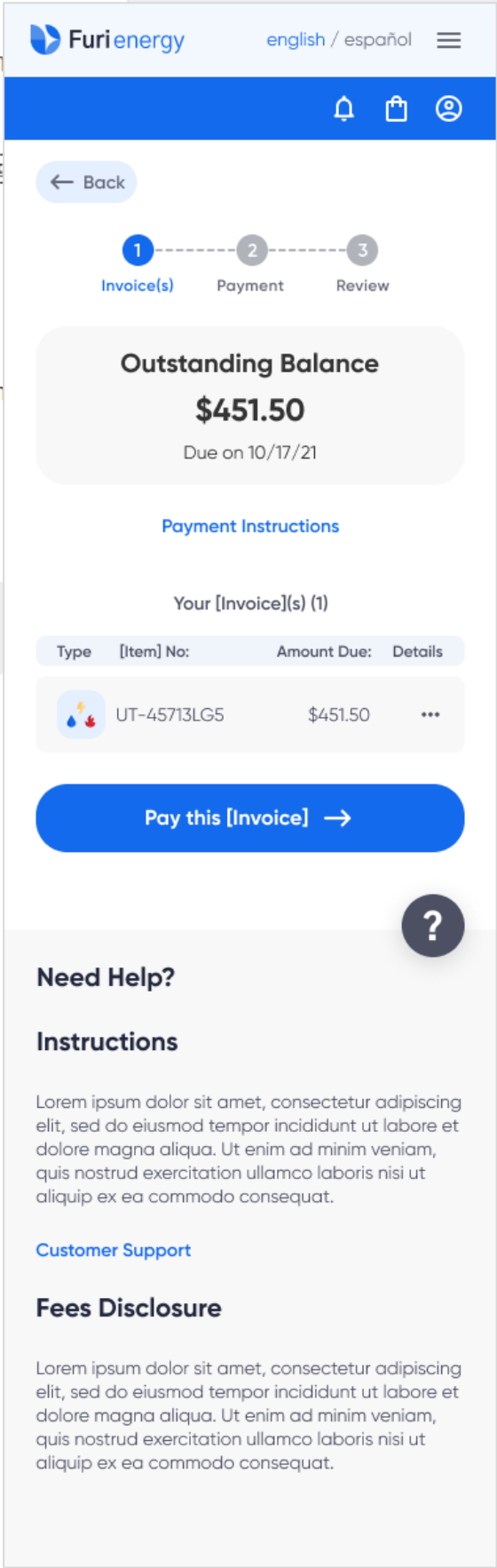
InvoiceCloud®



In this role I served as both a manager and an individual contributor, leading the research and design for a suite of fintech SAAS (EBPP) web applications to enable invoicing and payment transactions.



Original application



Redesigned application (mobile view)



INVOICE CLOUD

PAYER APPLICATION

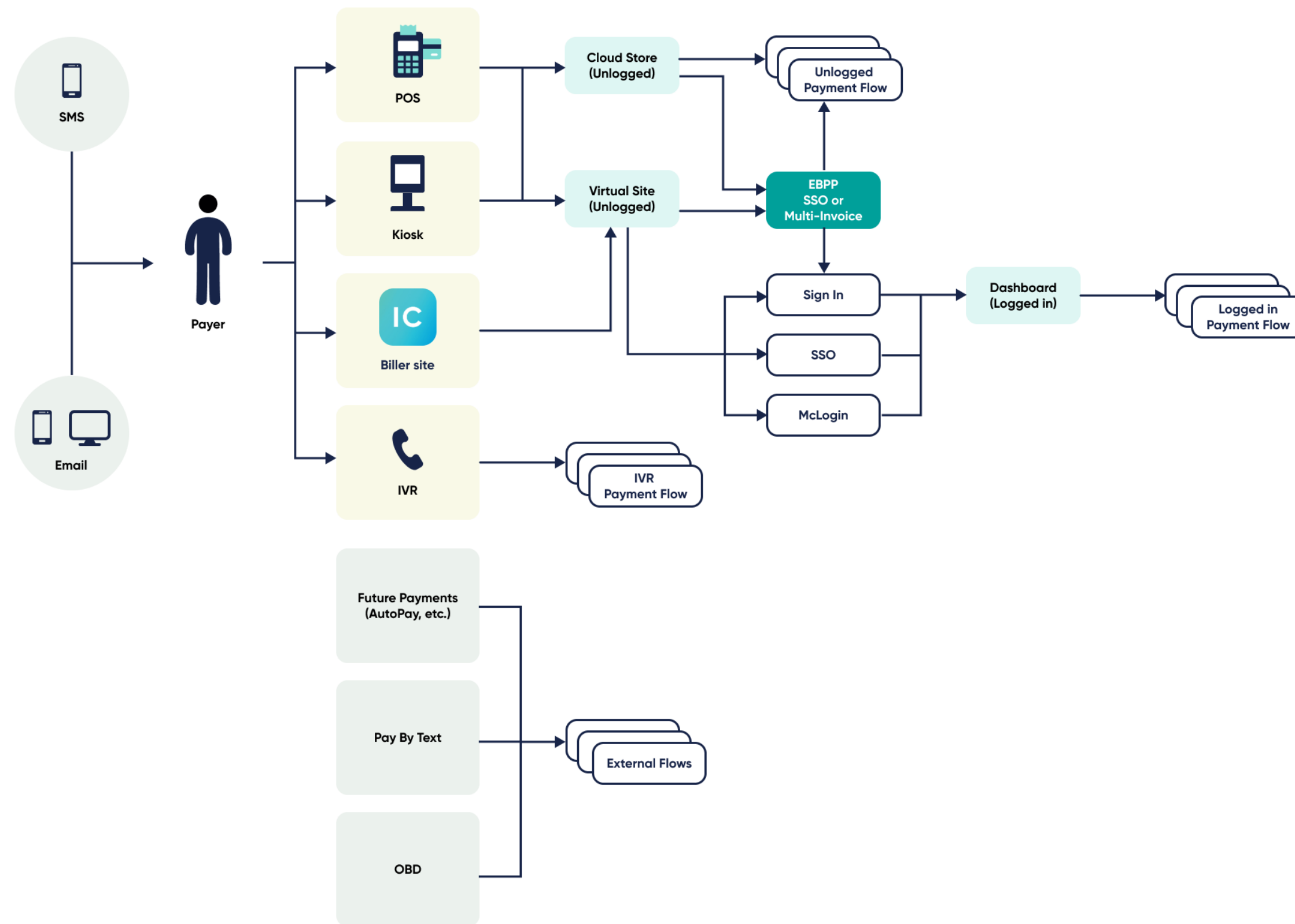
Project: UX Research and Product Design for a redesign of a legacy EBPP/SaaS application used to present and collection payment on invoices for government utility companies.

Problem: This application was one in a suite of applications which enabled the invoicing and payment transactions for mostly government utility and insurance clients. The application was around 12 years old, was “designed” by engineers, and had not had a restructure or redesign in that time. It was not optimized for mobile, had several different libraries/technologies underlying, had no consideration for accessibility, and several aspects of it had been customized for clients over the years, resulting in a bloated mess of tangled integrations and inconsistency.

(Continued...)

INVOICE CLOUD

PAYER APPLICATION

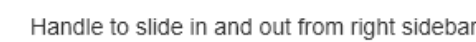


My role: I led the end-to-end UX research and design, mentoring a junior UI designer, and managing a team of outside contractors. We handled the entire front end research and design process- including business analysis (alongside PMs and tech leads), user research, information architecture, UX/interaction design, UI design and translation of Figma mockups to design system components in a repository used by front end developers, and then testing and further refinement before launch.

Environment: Low UX maturity and an engineering driven culture which required constant evangelization.

QUALITATIVE & QUANTITATIVE

The above combined with collection of quantitative usage data (in Pendo) started to form a picture of where the problems in the interface lied and how to fix them and meet the users' needs on the two main sides of the applications.



FEEDBACK

Nicole Furi
UX Researcher/Designer
Invoice Cloud

Have something to say about your experience with Invoice Cloud, and the process of paying your invoices online?

1. Choose an overall rating (optional):

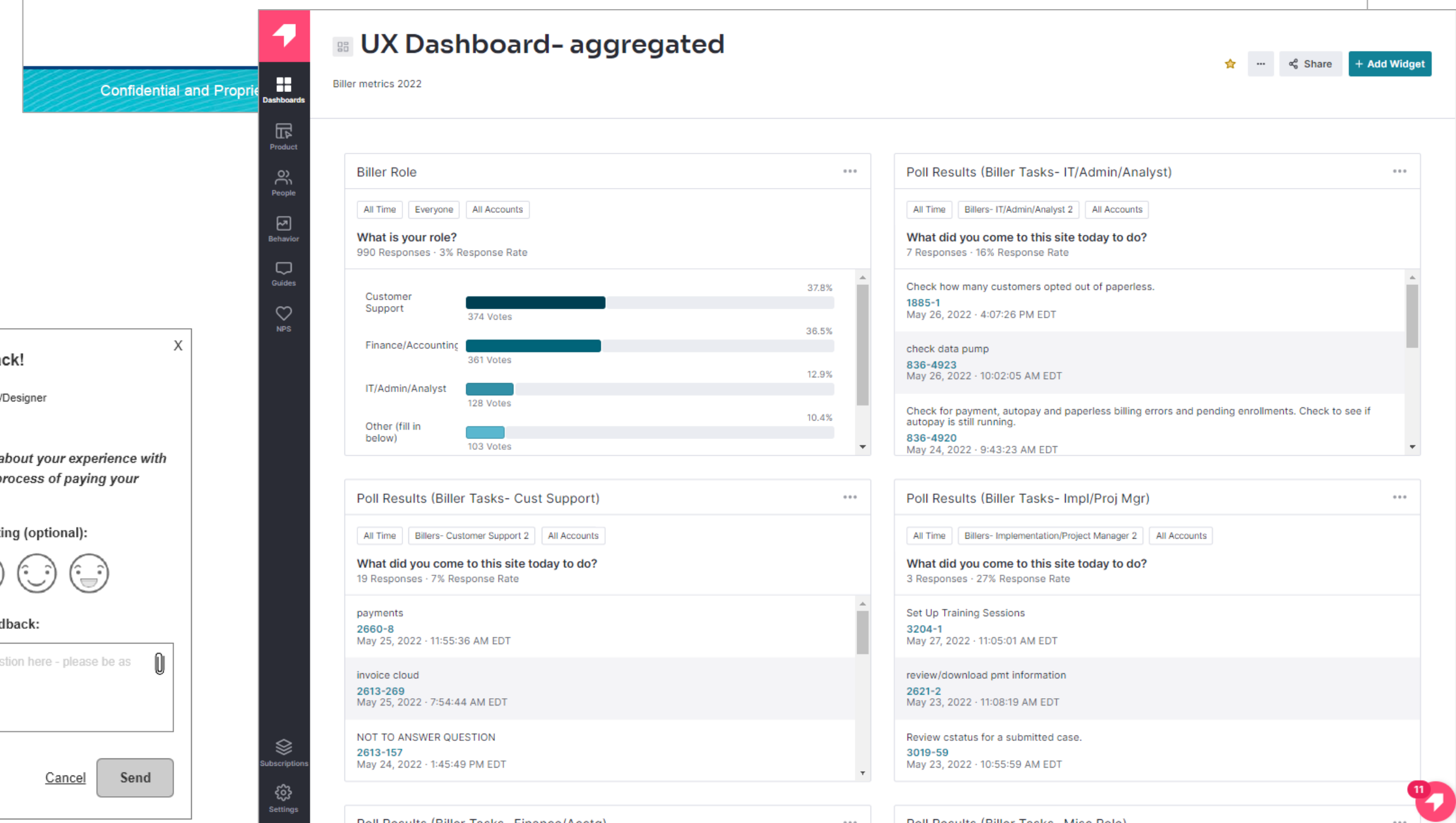
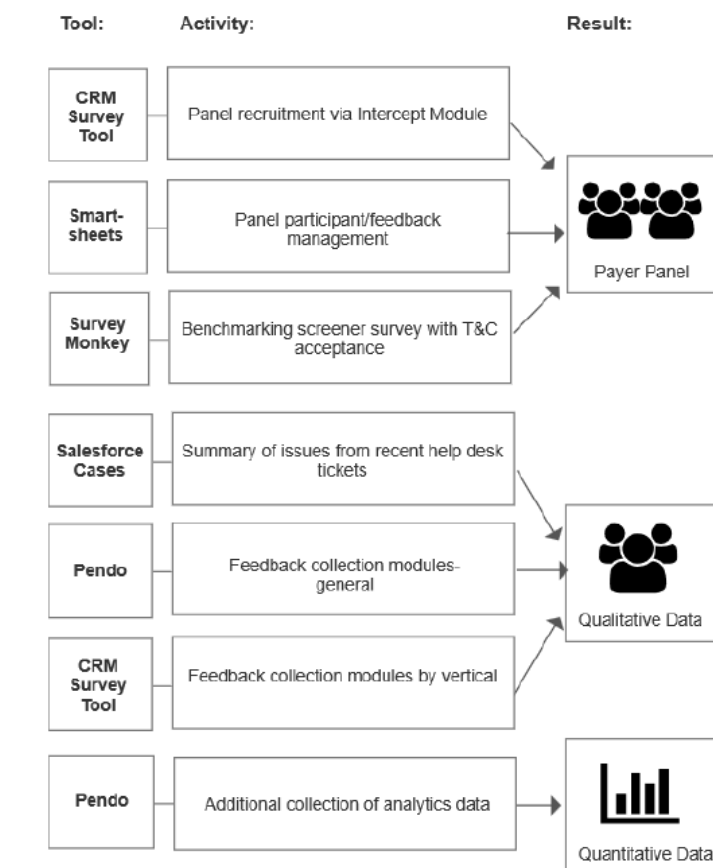
2. Let us know your feedback:

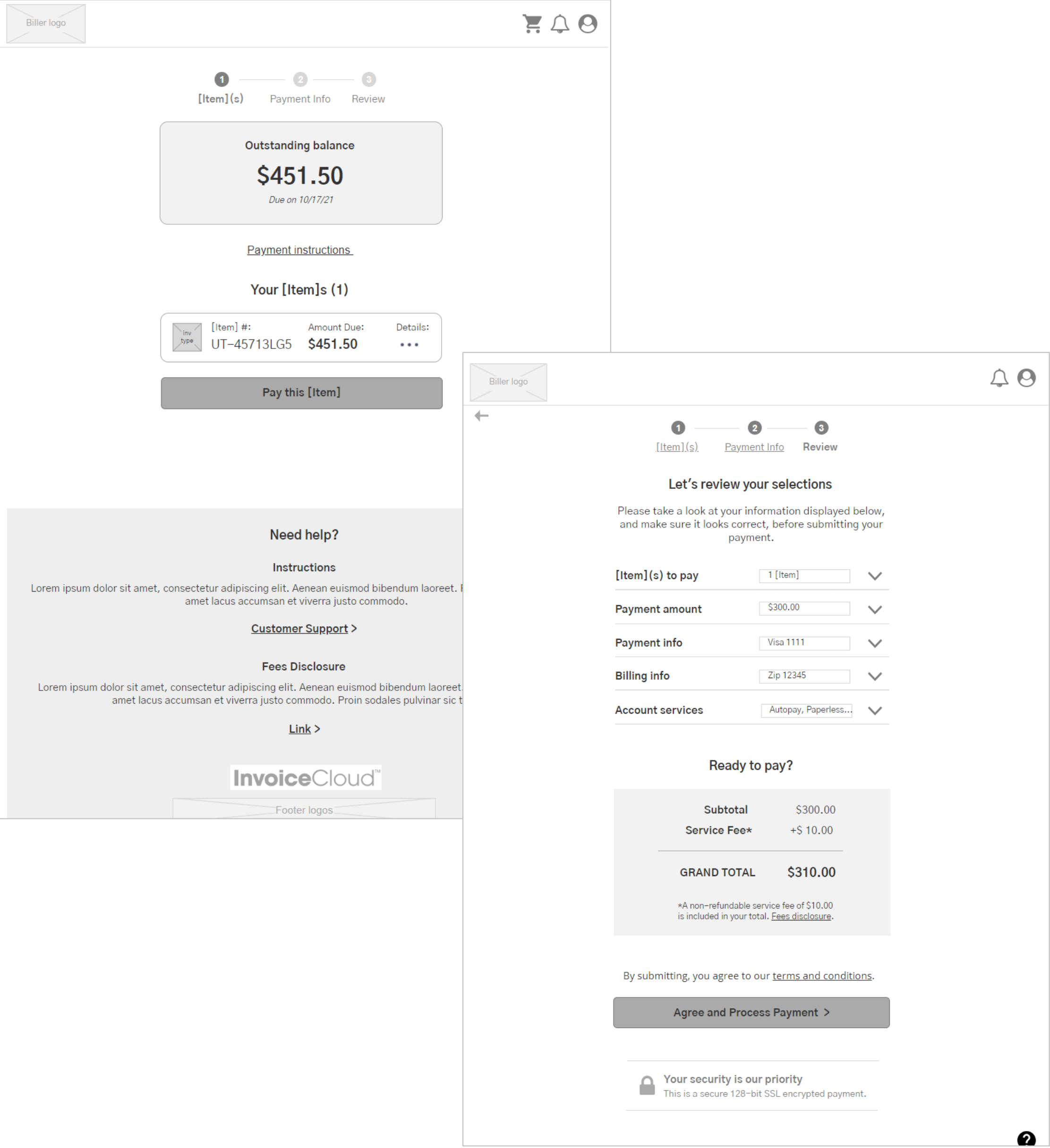
Type your feedback or question here - please be as specific as possible

Cancel

Send

In each quarter of 2024, the goal of our research effort is to collect a combination of both *qualitative* and *quantitative* data on our Payer users' activity within our InvoiceCloud application. This data can inform our Product strategy and priorities and help us back up our design decisions as we restructure and redesign the user experience of our screens going forward. We can also track differences in *sentiments* and *metrics* from quarter to quarter, over time. To the right is a snapshot of the activities which made up this effort on the Payer side, and the tools that enabled them this quarter.





UX DESIGN

WIREFRAMED RECOMMENDATIONS

Based on my research, I was able to target the areas of the application that needed to be improved, and set up a clickable, responsive wireframe prototype of my recommendations, which I could walk both stakeholders and users through for feedback (I used User Zoom to test prototypes).

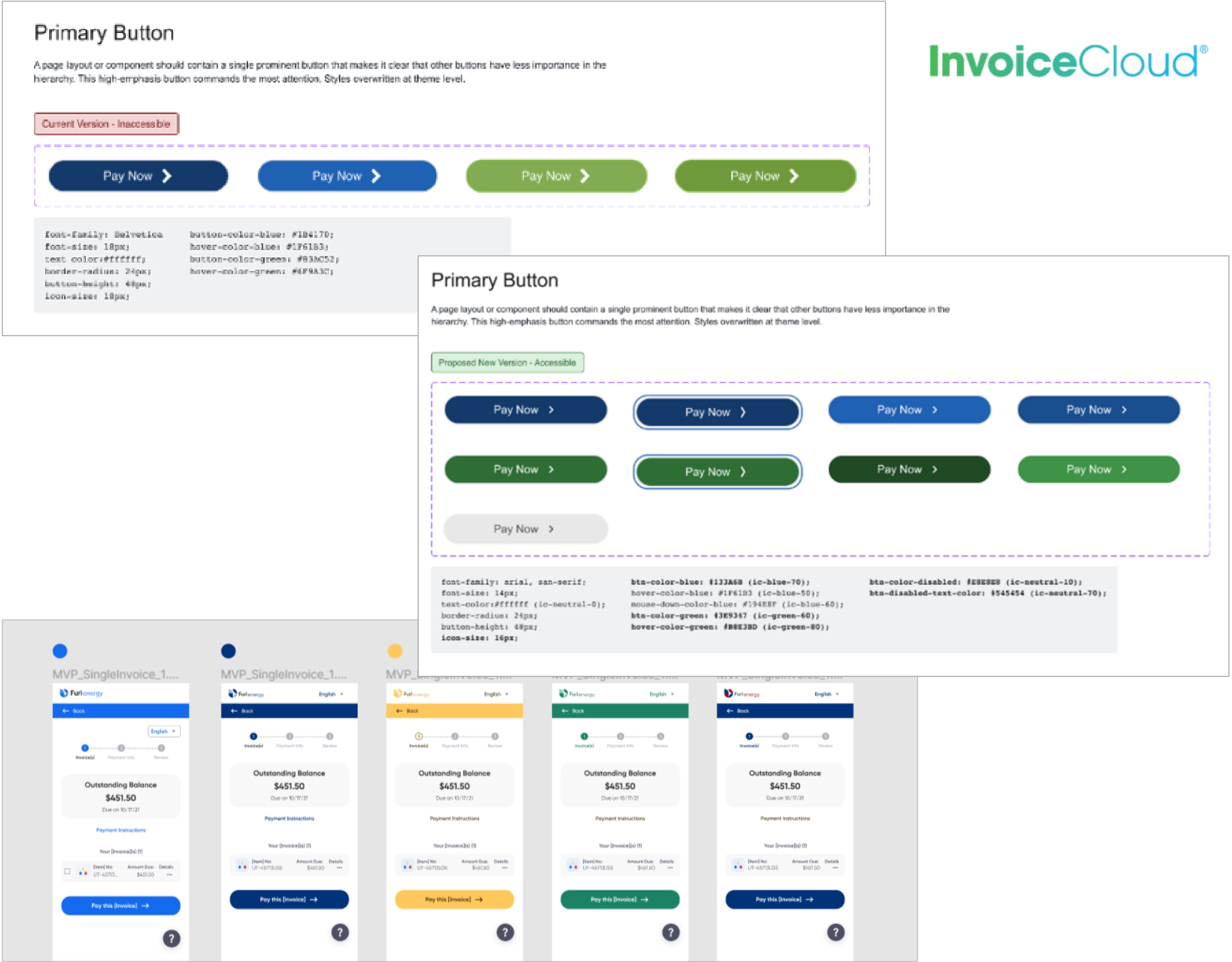
| | |
|--------------------------------|--------------------------------|
| Round 1 (low fidelity): | Round 2 (high fidelity): |
| Prototype link | Prototype link |

In these design revisions, I optimized for mobile which was a huge improvement given that over 50% of the users were on mobile! I also simplified the information hierarchy on screen and reduced the number of steps to complete the check out process. I also added contextual help options to guide the less tech savvy users through the process. As our screens became more solid, we started to add in color to our testing prototype.

UI DESIGN

DESIGN SYSTEM

The next step was to consolidate and standardize the components in a master design library in Figma. As we started to iterate on screens, we made updates to these components as needed, to improve the overall presentation of the app, with a focus on accessibility as many of our users were elderly. The library followed an Atomic Design model. I and the junior designer worked closely with the front end developers, who eventually translated our library into a repository of components on their end, from which they could pull to implement screens.



| <input type="checkbox"/> | Type | Service Address | Account # | Status | Payment Method |
|-------------------------------------|------|-----------------------------|-----------|--------------|----------------|
| <input type="checkbox"/> | | 123 Main St. #1 Anytown, AA | RE-1234 | Enrolled | Visa 4514 |
| <input checked="" type="checkbox"/> | | 123 Main St. #1 Anytown, AA | RE-1234 | Not Enrolled | Visa 4514 |
| <input type="checkbox"/> | | 123 Main St. #1 Anytown, AA | RE-1234 | Enrolled | Visa 4514 |
| <input type="checkbox"/> | | 123 Main St. #1 Anytown, AA | RE-1234 | Enrolled | Visa 4514 |
| <input type="checkbox"/> | | 123 Main St. #1 Anytown, AA | RE-1234 | Enrolled | Visa 4514 |

IMPLEMENTATION

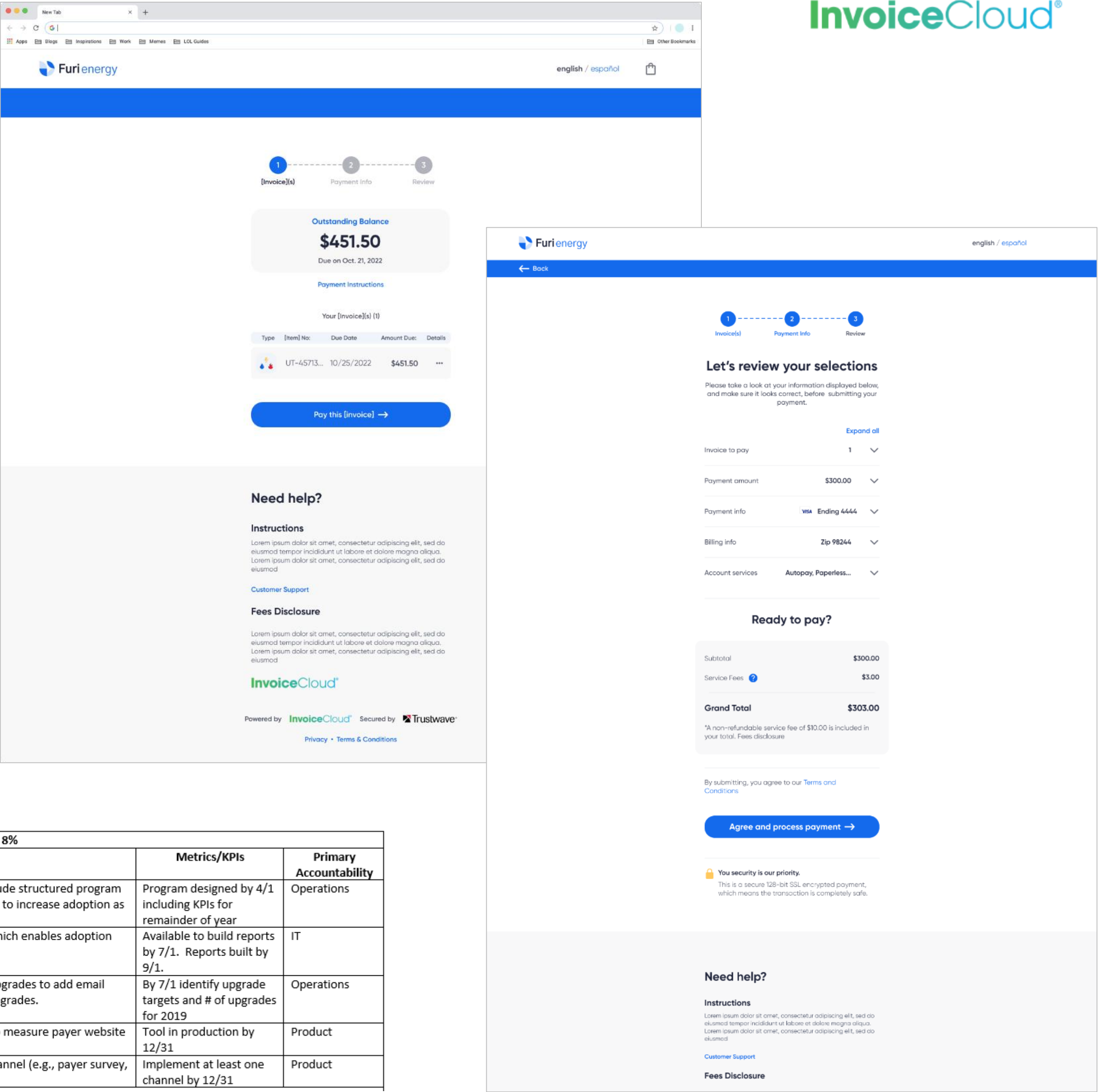
AGILE SCRUM

Eventually we had a solid user flow, and converted the wireframes into high fidelity mockups in Figma. These incorporated the new design library components.

From there the sections were broken down into user stories in Jira, and added to sprints to be implemented.

We also set up our analytics tools to track adoption going forward, per request from the business. Additionally we submitted the app for an accessibility audit and a new VPAT report, to ensure we were successfully meeting updated WCAG standards.

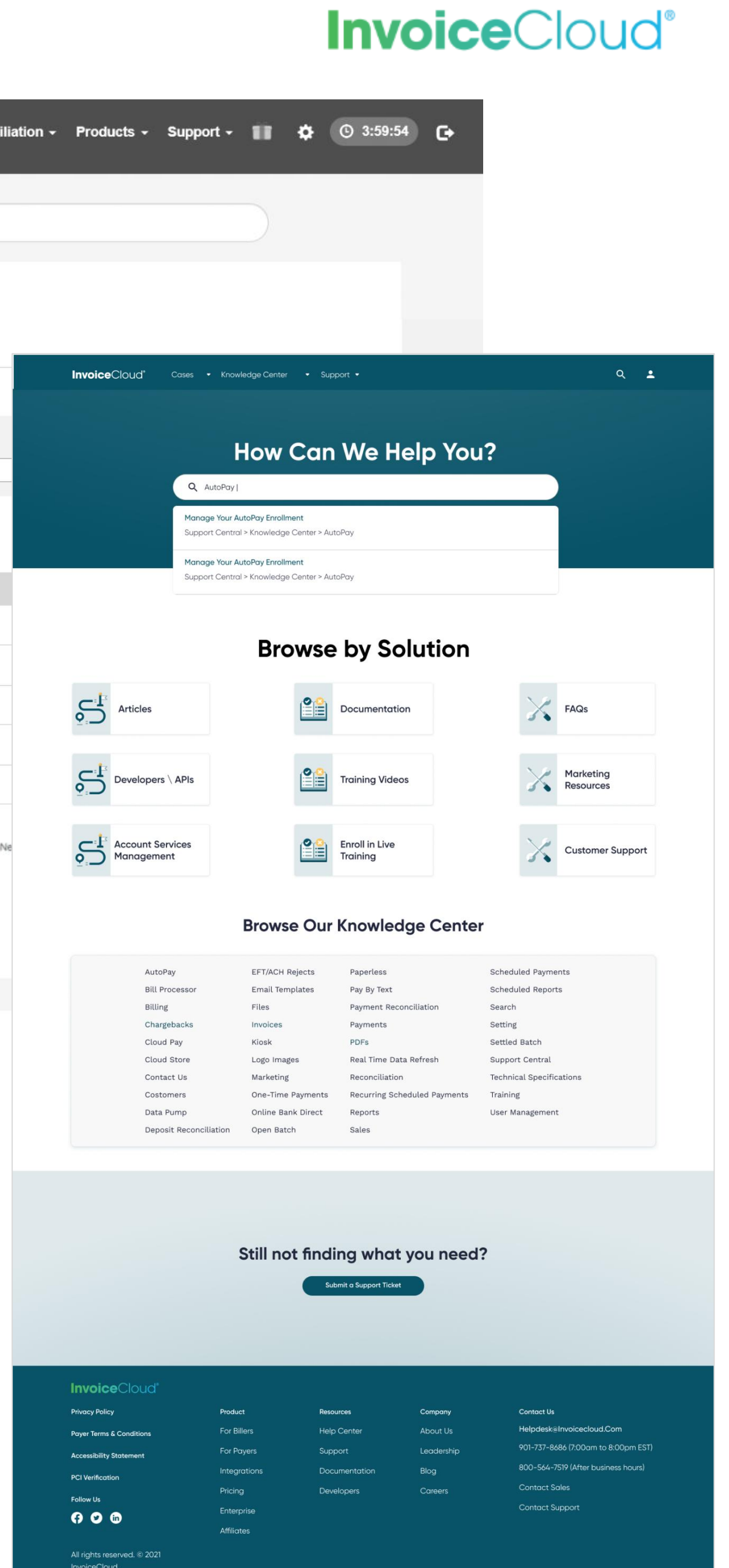
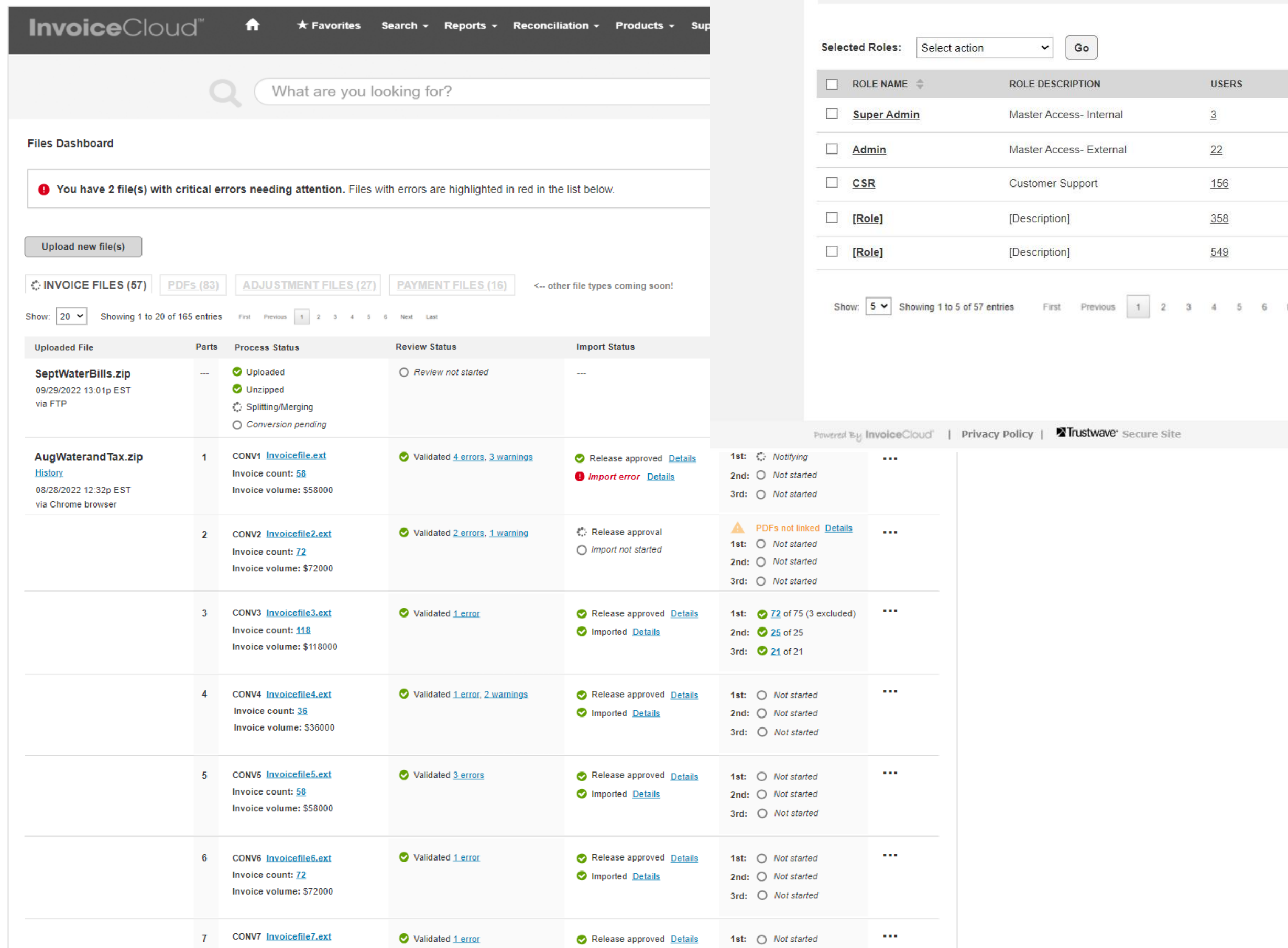
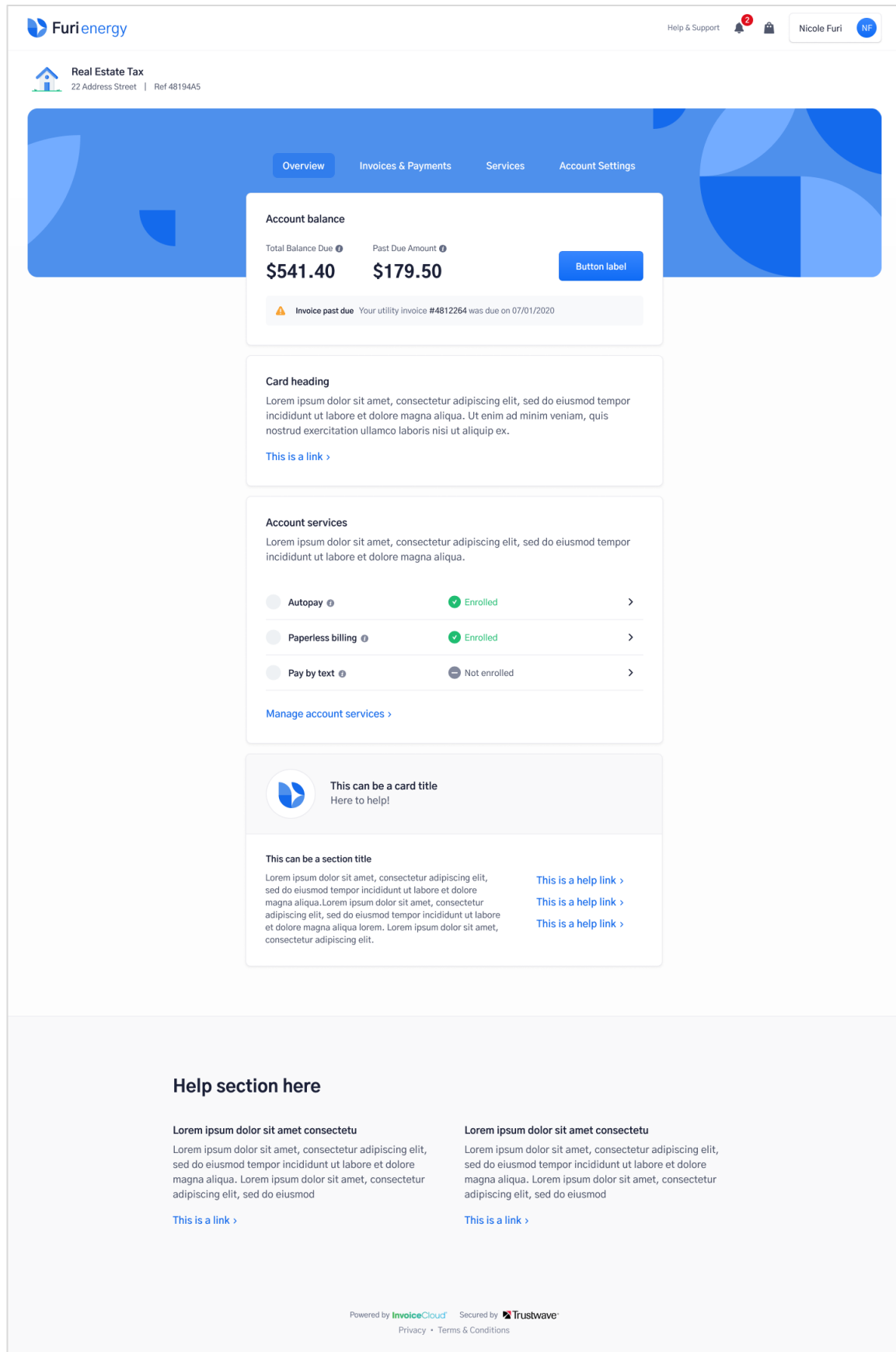
| Strategic Priority 1: Achieve Revenue Growth of 42% with EBITDA of 8% | | | |
|---------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|------------------------|
| Objective | Initiatives | Metrics/KPIs | Primary Accountability |
| Drive payer adoption growth of 25% and enable ongoing measurement and analysis of adoption drivers and trends | Enhance Relationship Manager role to include structured program focused on add-ons and activities designed to increase adoption as defined with Marketing. | Program designed by 4/1 including KPIs for remainder of year | Operations |
| | Deliver first iteration of data warehouse which enables adoption reporting and analysis of key drivers. | Available to build reports by 7/1. Reports built by 9/1. | IT |
| | Identify high priority partner integration upgrades to add email address and begin outreach followed by upgrades. | By 7/1 identify upgrade targets and # of upgrades for 2019 | Operations |
| | Select tool and implement web analytics to measure payer website behavior. | Tool in production by 12/31 | Product |
| | Implement payer voice of the customer channel (e.g., payer survey, focus groups, usability testing). | Implement at least one channel by 12/31 | Product |



PRODUCT SUITE

SAAS APPLICATIONS

The Payer application was just one of the projects I led at Invoice Cloud in my time there.



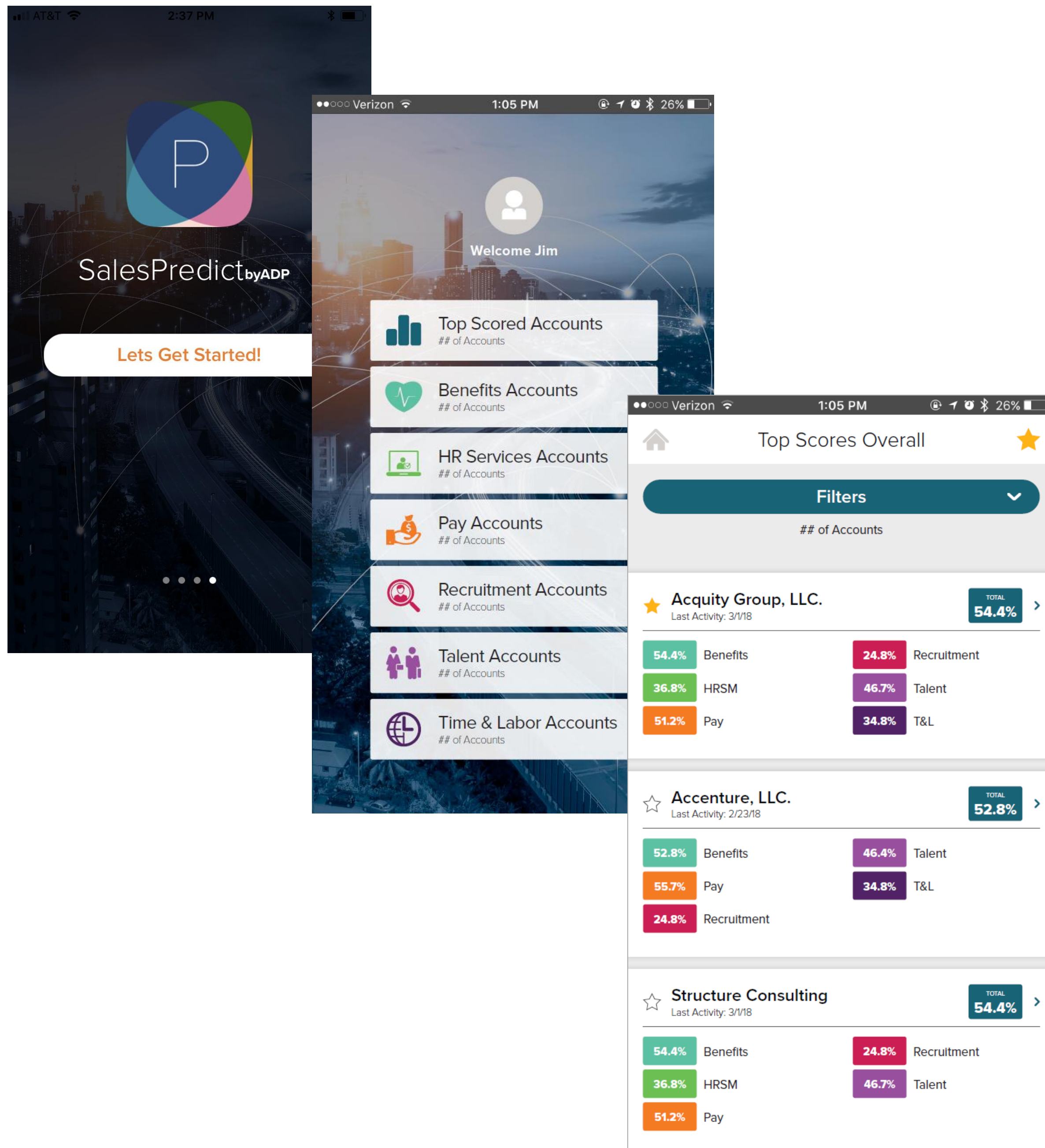
3

PROJECT: SALES PREDICT MOBILE APP

CLIENT: ADP



In this role I served as the sole UX Researcher and Designer, supporting the international salesforce of a large enterprise, across several business units, working to optimize tools for sales enablement.



SALES PREDICT NATIVE MOBILE APP

Project: UX Research and Product Design for an AI-driven sales enablement mobile application. This was a custom mobile application for iOS, pulling from multiple data sources, including Salesforce records, which was intended to rank a rep's accounts in certain categories, using AI-driven predictions as to how likely that account would be to close a deal in the given category. This mobile application would be one in a suite of sales enablement tools accessed via a dashboard called Launchpad.

Problem: Salespeople wanted a way to rank their leads in various categories, before they approached them with a pitch. This way they could tailor their approach better to the prospects' needs.

My role: I managed the end-to-end UX research and design.

Environment: I was the first designer in this division, so wore all the hats on the front end, working with mostly salespeople and a lead developer.

UX RESEARCH

PERSONA DEVELOPMENT

My first task was to get to know both Field and Inside sales representatives, and learn about their working process. The goal was to determine the differences in their needs and approaches.


I accomplished this by setting up a series of in-person “ride-alongs” with the sales agents, as well as more specific focus group interviews where I asked a series of questions to elicit more information from them.

These focus groups occurred over a number of months, and resulted in snapshots of each type of salesperson, as shown to the right.

DM Personas

Persona

Field Sales- General



Environment:
Combination of in the office and in a car

Devices:

- Primary- laptop (provide the ability to have a file structure)
- Secondary- iPhone
- Tertiary- iPad or other tablet (mostly used for demos or hotspots)
- Prefer the ability to use a mouse and keyboard
- Often need adapters for on-the-go

Communicate/Collaborate with:

- Accounts
- Advisors
- Colleagues
- Implementation
- Managers
- Partners
- Prospects
- Service

Communications:

- Primarily communicate via email or Lync
- Rarely use chat or social media feeds
- Sometimes texts and uses phone to call
- Tend to share content via email
- Track to-dos manually with pen and paper
- Will print materials prior to meetings
- Often present content with Web Ex

Apps used:

- Avention
- BC Scheduler
- Blueprint
- Demos/Talk tracks
- El Paso
- ESO
- Evernote
- Google Maps
- Guided Selling App
- Leadbox
- Lync
- Oracle
- Outlook
- POV
- Pricing Tool
- Sales Beacon
- Salesforce
- Sales Genie
- Sales Navigator
- Seismic
- Social Media ie. LinkedIn
- Tableau
- Web Ex

Requests:

- More emphasis on training
 - should be region-based
 - education best done by possibly an onsite “lun not as helpful
 - don’t push out via Essentials
- “My Day”- be able to have a (potentially collaborative) folder you drag/drop everything you need that day into, latest versions of materials, have everything automatically set up and pushed to iPhone/iPad, with reminder notifications
- Having a dedicated support person at each Tech café who is the authority on sales tools
- A “Tools and Tips” module which supplements trainings, and has notifications on new app updates

Special considerations:

- Info needs to be updated and synced across devices
- Quality of connectivity will vary depending on where they are

Top pain points:

ESO/
Quotes


Need
Responsive
Access

Single
Sign -
on

DM Personas

Persona

Inside Sales- General



Environment:
In the office at an assigned desk in a pod

Devices:

- Windows desktop
- Two or more monitors
- Automatic dialer
- Headphones

Communications:

- Primarily communicate via email (and love SmartBlasts in general)
- Also use Lync often
- Sometimes texts with phone
- Tend to share content via email
- A couple of reps rely on Seismic and Chatter, but tends to differ by role responsibilities within their BU

Communicate/Collaborate with:

- Account/Clients
- Colleagues
- Franchise Owners
- Implementation
- Partners
- Prospects
- Sales Leaders
- Sales Support
- Service

Special considerations:

- Since they are in-office, a lot of communications can be broadcast on monitors in their workspace, can communicate on goals, recognize employee successes, have games and challenges etc. on screen
- They also tend to be more collaborative with leaders and colleagues face-to-face

Apps used:

- Alpha Trust
- Ambition
- Avention
- Blueprint
- Clarify
- Dialsource
- Eloqua Engage
- El Paso
- ESO
- Excel
- Google Alerts
- Learning website
- Lync
- Main
- One Note
- Oracle
- Outlook
- Quote Tool
- RUN
- Salesforce
- Sales Navigator
- Seismic
- SHRM website
- Start Assist
- Talk Tracks

Requests:

- Want to be CC’d on communications to the field
- Would love to see company social media accounts fed into Salesforce records
- Need better tools training for new hires and with rollouts

Pains:

- Client data exists in several places, wish it was better integrated in Client Controls section of SFDC
- Data in Salesforce is inaccurate
- Many reps don’t have RUN access
- Visibility into and communication with Implementation
- Reps putting in Opportunities when no actual contact was made
- When accepting leads, there is not enough info on where it is from and the history of contact
- Not enough into on apps in training, or with new rollouts, also training content is slow to be posted
- Need better method of feedback collection on apps

Top pain points:

Inaccurate
or
decentralized
data

ESO/
Quotes

Communications/
Training

UX RESEARCH

EVANGELIZATION

As I was working with salespeople rather than with a formal Product team, it was necessary to educate the team on the importance and value of user research in order to get their cooperation in forming a project plan. I performed a series of “lunch and learns” to walk the team through the typical UX research and design process, and ultimately got buy in to dig deeper and formally launch the design project.

User Experience (UX) Design Process Steps

1. Research/Discovery

Get an overview of a project; determine business goals, look at competitor products for insights, identify and observe users, analyze user goals and tasks

A focus on User Research means:

- You won't have to “make up” product requirements
- You can have data that holds up against other opinions and assumptions
- You can be confident in the design decisions made

“Observing what people do, in upfront user research and usability testing, is far more accurate and useful than simply asking people what they do.”

-Infragistics on The Business Value of User Experience



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Process Steps

2. Audit Content

Inventory and audit existing content, create new content, keep content updated across different releases, determine tone and labeling

| Business Objectives | Primary Content Related Metrics |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Strengthen brand health | Share of voice on topics covered by content Net Promoter Score for those who consume content Earned media coverage driven by content Social media link shares of content |
| Improve lead generation | New leads generated (first, last, and multibooth) Newsletter sign-ups |
| Improve lead conversion | Conversion rate between newsletter sign-ups and sales Conversion rate between content downloads and sales |
| Improve retention | Sales cycle time for leads that touch content Percentage of existing customers who opt-in to receive content |
| Improve web traffic | Referential traffic Page views SEO in content |

| Publication Date | Title | Content Program | Content Creator | Editor | Persona | Audience Need | Buying Cycle Stage | Call to Action |
|----------------------|---------------|-----------------|---------------------------------|----------------|-----------------|--------------------|--------------------------------------------------------|--------------------------------------------------------|
| Date to work towards | Working Title | Name of Program | Employee, Third Party, Licensed | Name of Editor | Name of Persona | Question to Answer | Discovery, Consideration, MQL, SQL, Intent to Purchase | Download, Visit Another Page, Contact the Brand, Share |
| Date to work towards | Working Title | Name of Program | Employee, Third Party, Licensed | Name of Editor | Name of Persona | Question to Answer | Discovery, Consideration, MQL, SQL, Intent to Purchase | Download, Visit Another Page, Contact the Brand, Share |
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Content Strategy docs

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Process Steps

3. Devise Structure

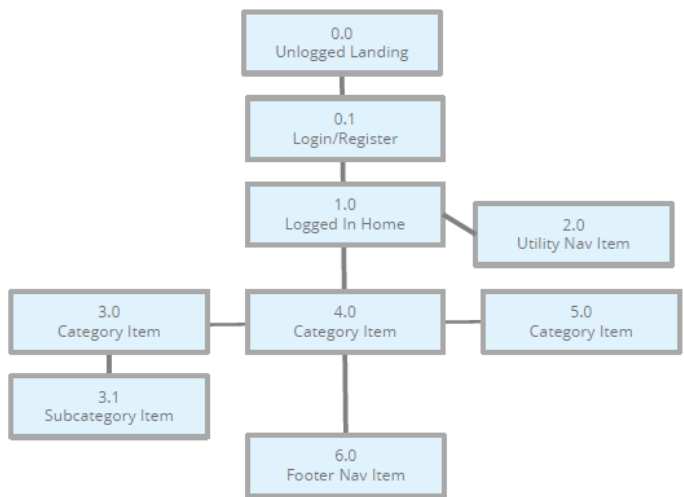
Plan and map out the hierarchy of screens under a task-based navigation system

Global Navigation:
Home | Task1 | Task2 | Task3

Utility Navigation:
Search | Support | My Account

Footer Navigation:
Contact | T&C | Privacy

Navigation Structure & Labeling



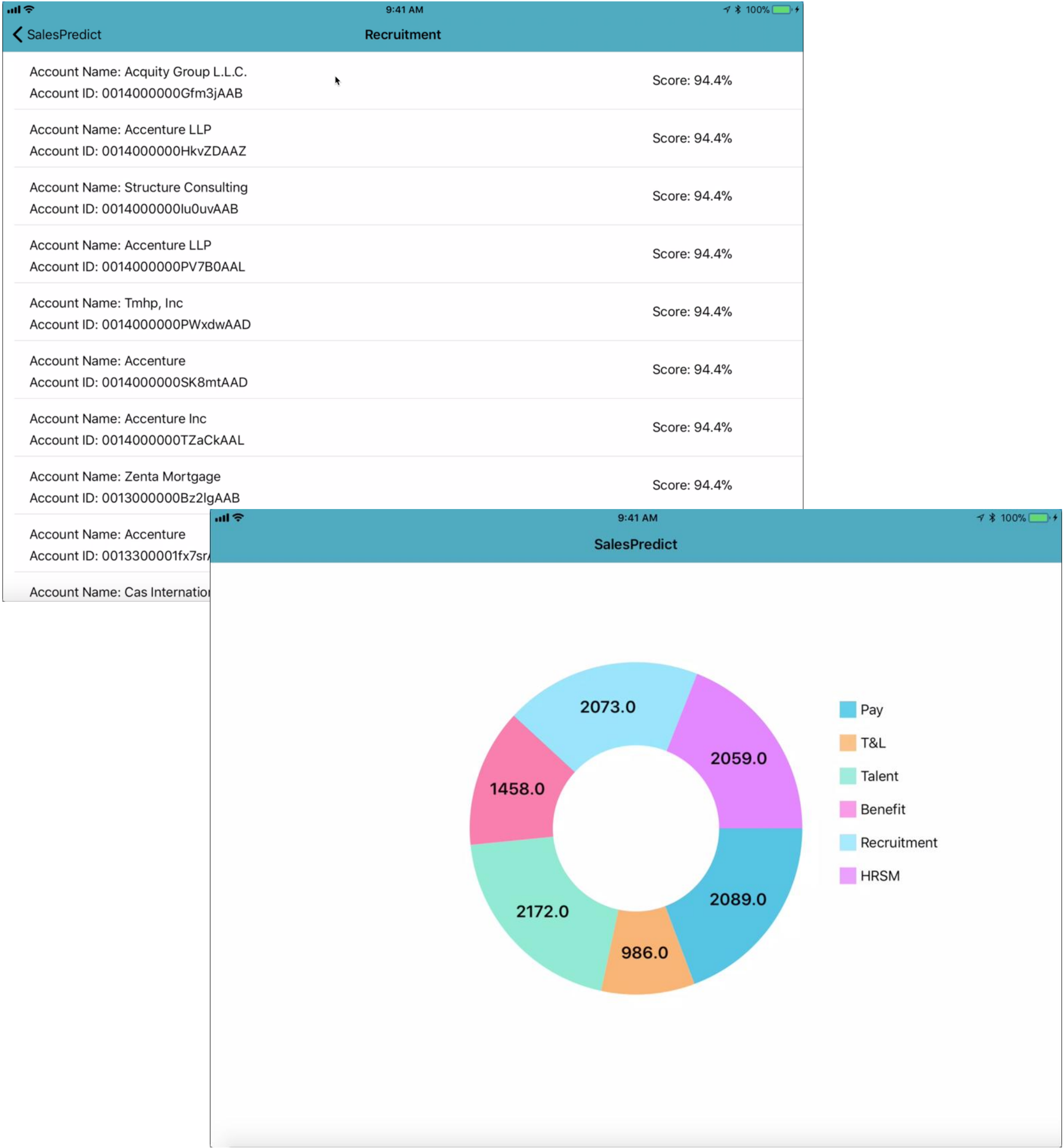
Site Map

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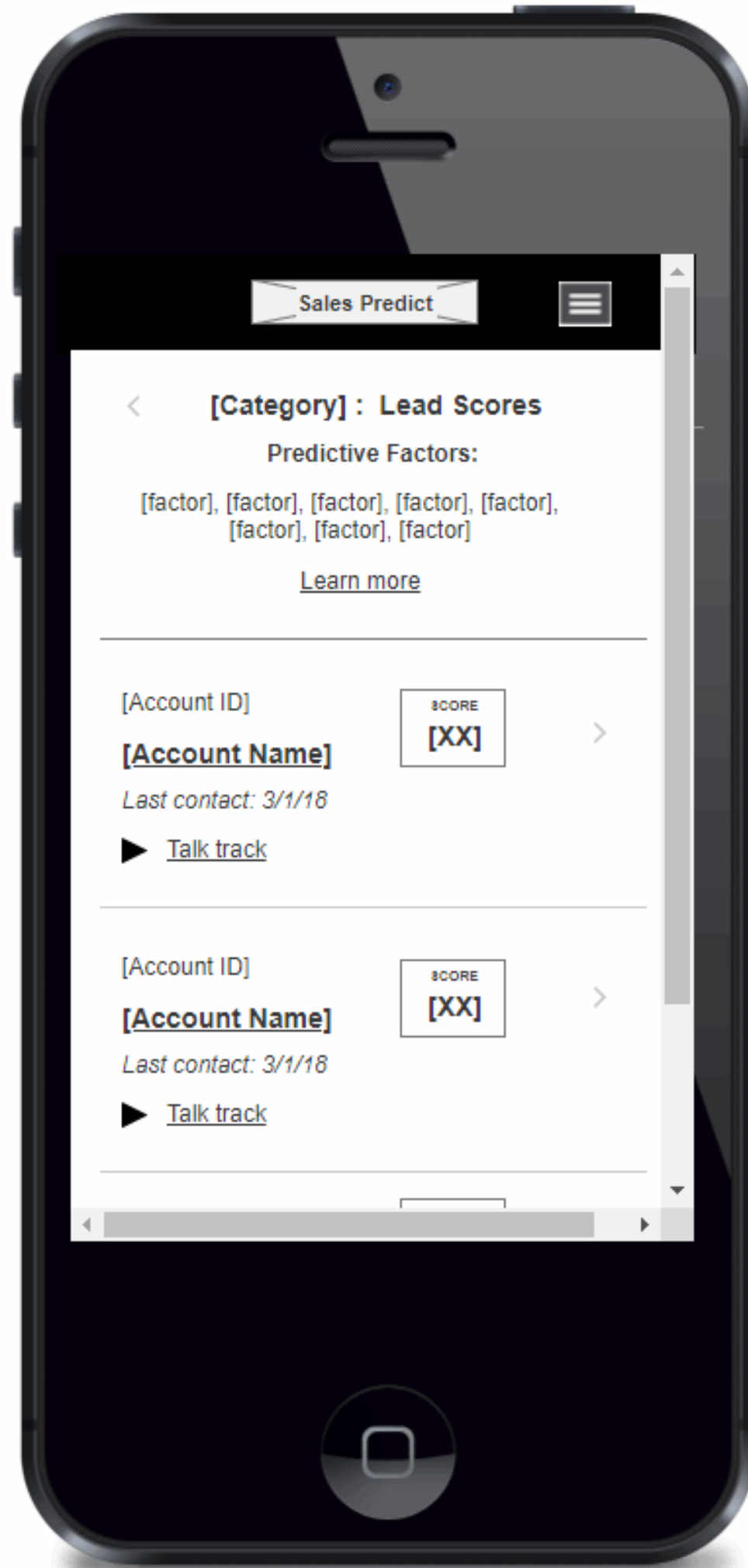
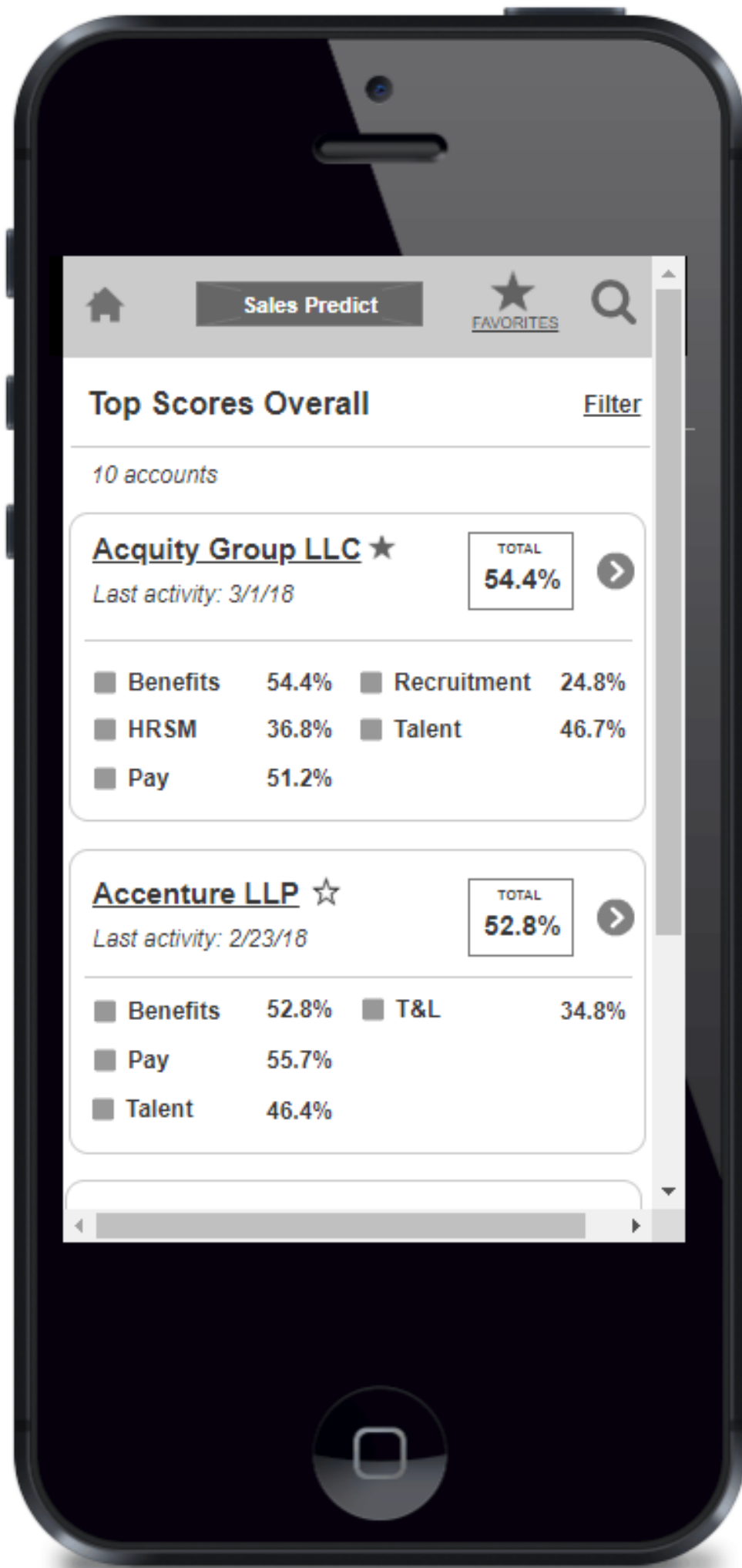


UX DESIGN

ITERATION



My sales team had mocked up a rudimentary proof of concept to use as a starting point, however it was designed for tablet, and I learned in my research that the majority of the salespeople wanted to be able to use an app on their phone. We decided to build a custom app.



UX DESIGN



ITERATION

Once I was able to determine the best approach for each of the types of sales reps, I matched their feedback up to the business requirements in order to devise a structure and layout for a mobile app.

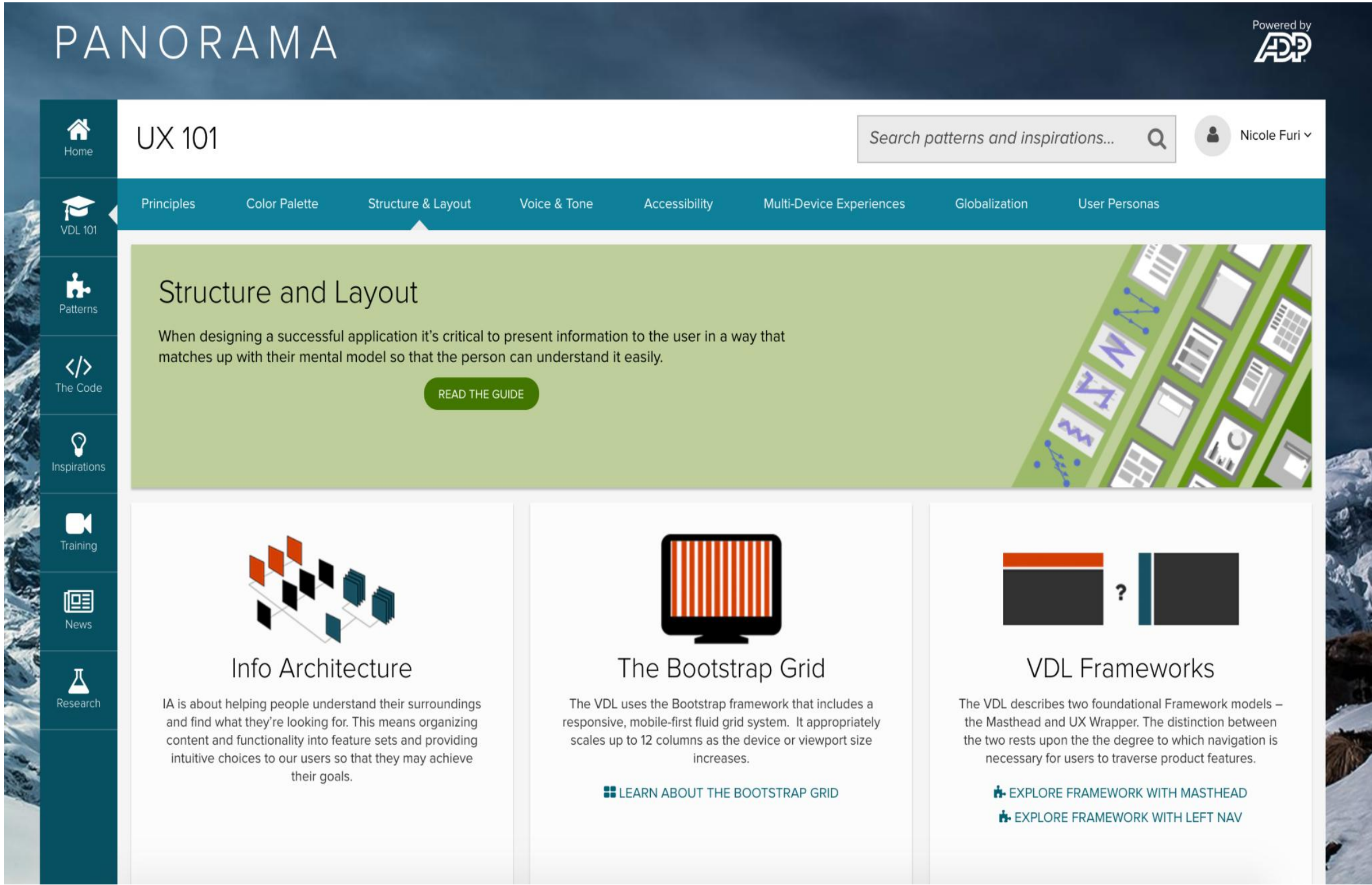
There were necessarily several rounds of iteration and feedback collection on wireframes. Working with the the sales team, I determined which were the most relevant categories to rank prospects on, and on what numerical scale. We went back and forth on how much information should be shown for each up front, or kept more in the peripheral.

I used Axure for wireframe prototypes (at the time I preferred its prototyping capabilities to Figma).

UI DESIGN

DESIGN STANDARDS

This project happened before there was much of a focus on design systems for UI, so I did not have a component library to pull from, but I was able to reference a set of basic design standards accessed via a company portal, which I used to put together the high fidelity mockups.

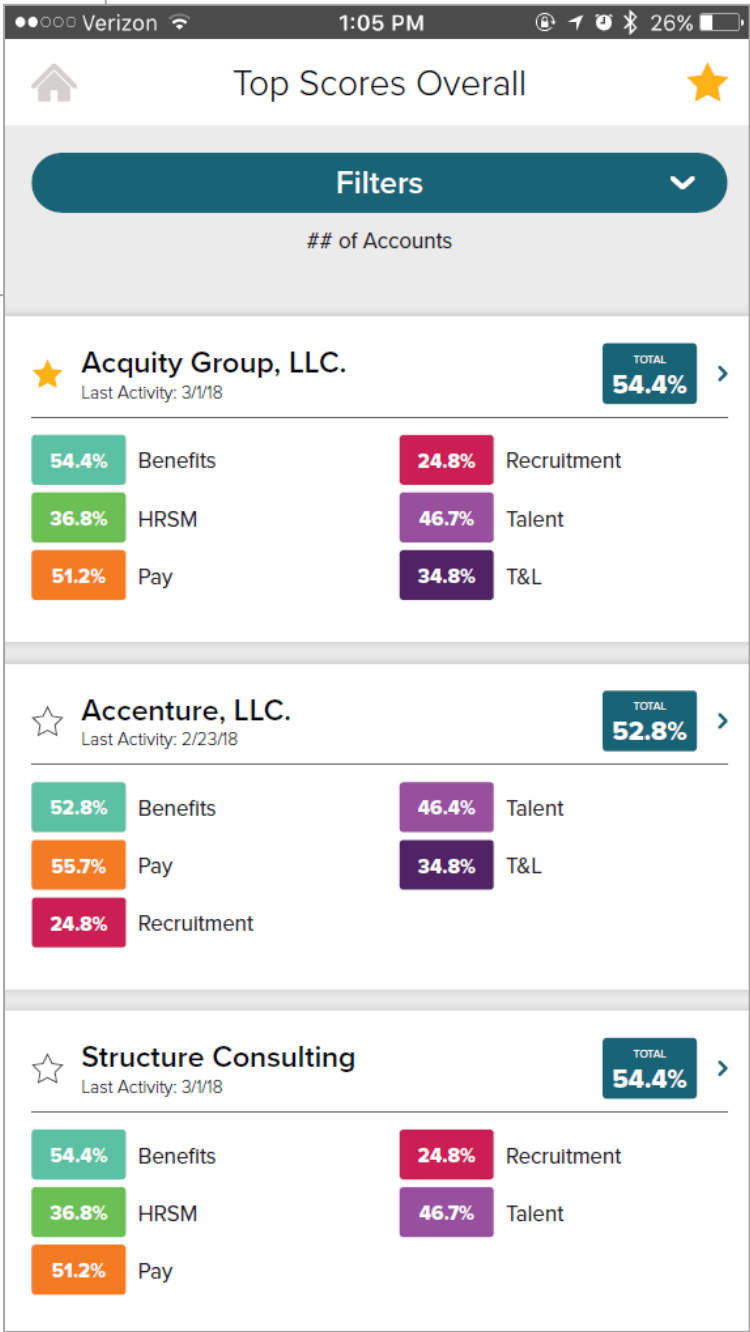
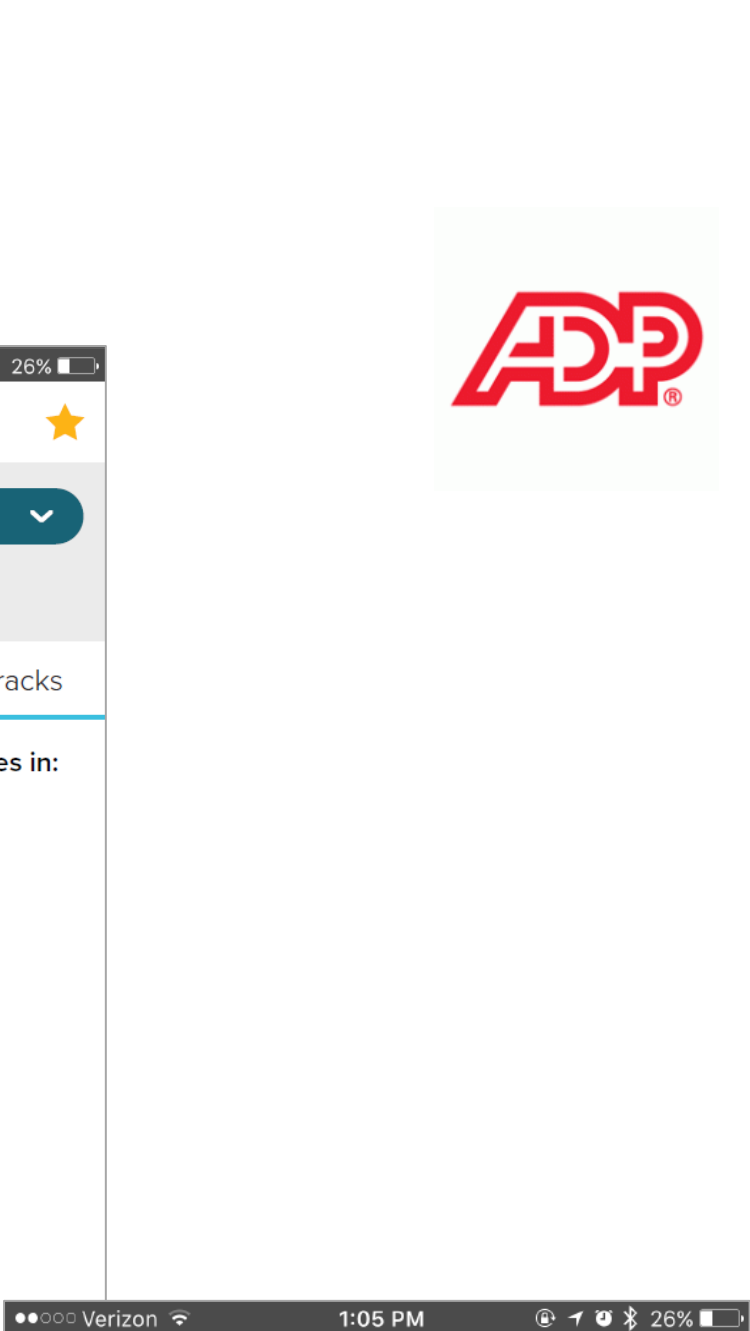
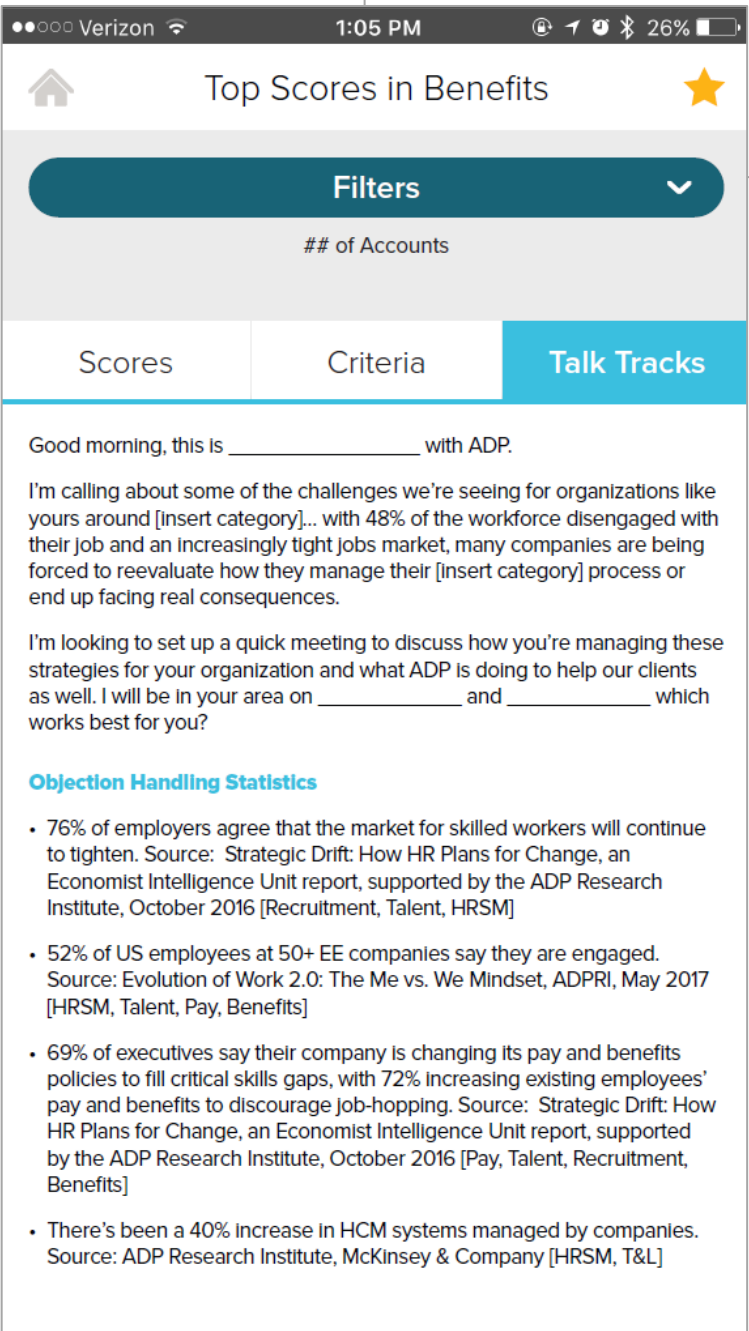
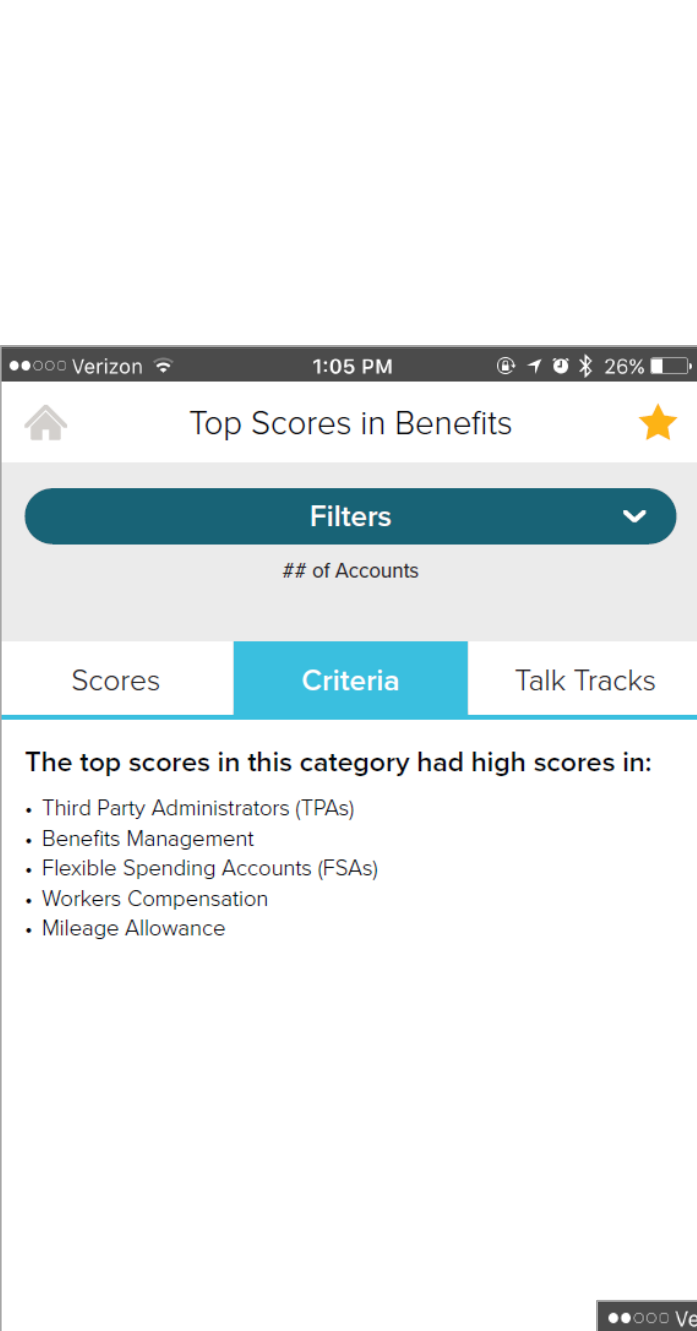
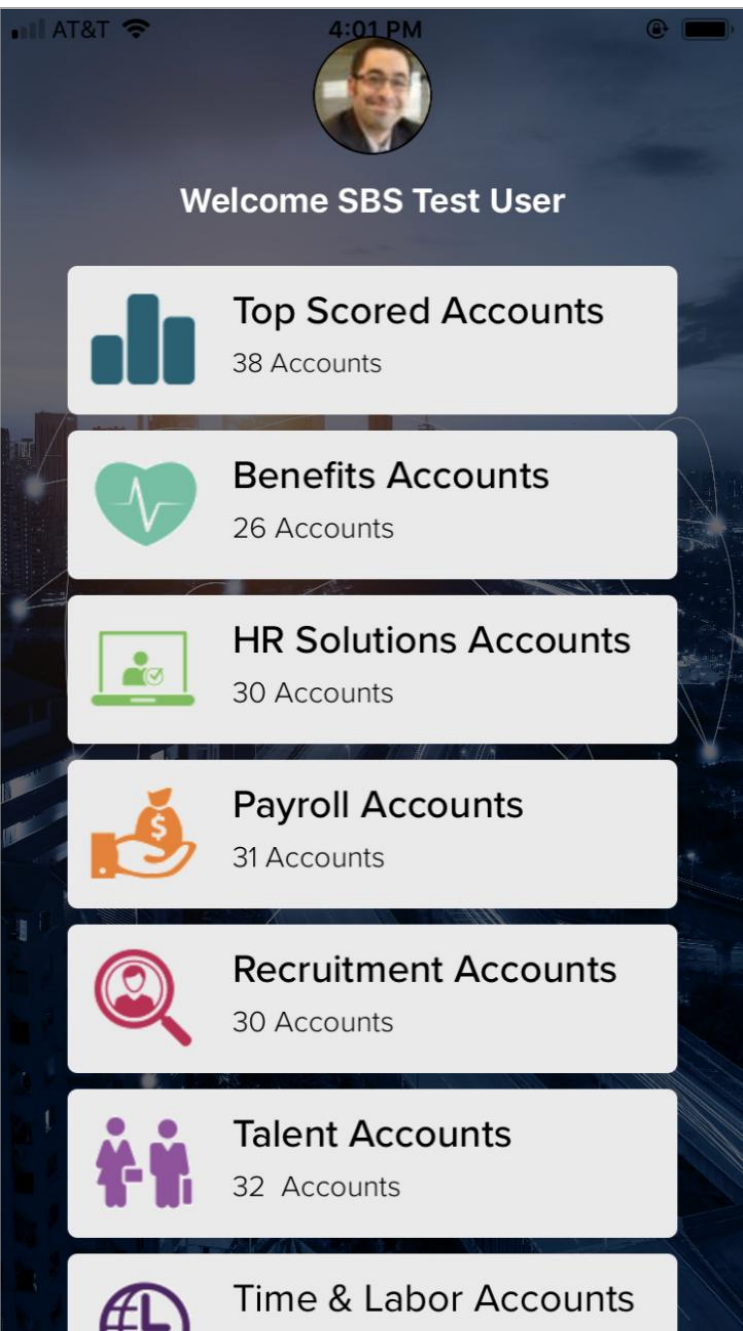


IMPLEMENTATION

AGILE SCRUM

Ultimately I refined a working prototype and moved it to high fidelity. The app contained three core screens to assist the salesperson in their approach- the scored accounts, a screen which provided them any available details on the criteria used to score a specific account, and a personalized talk track for the sales rep to refer to, which pulled in relevant statistics to support their pitch.

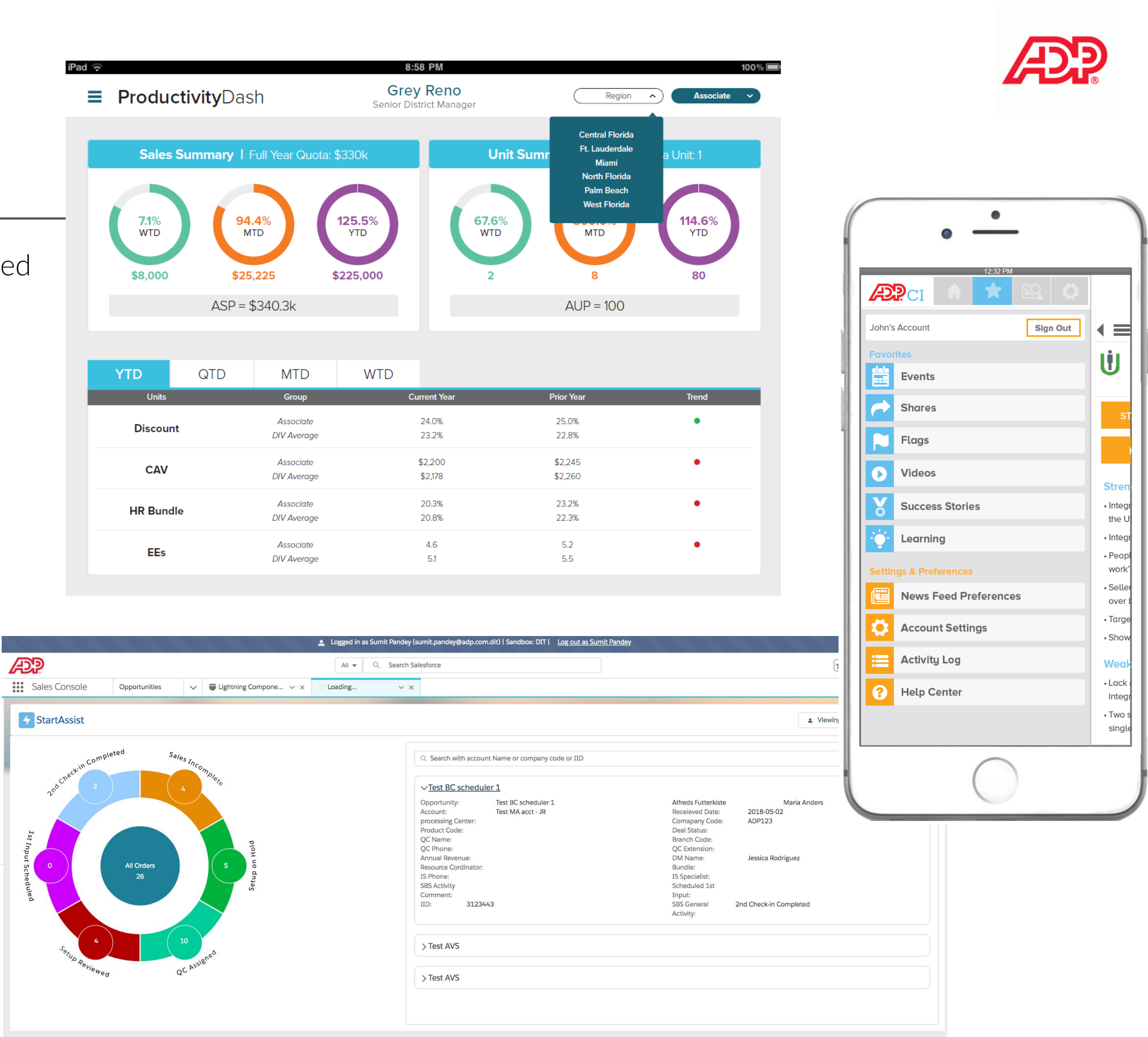
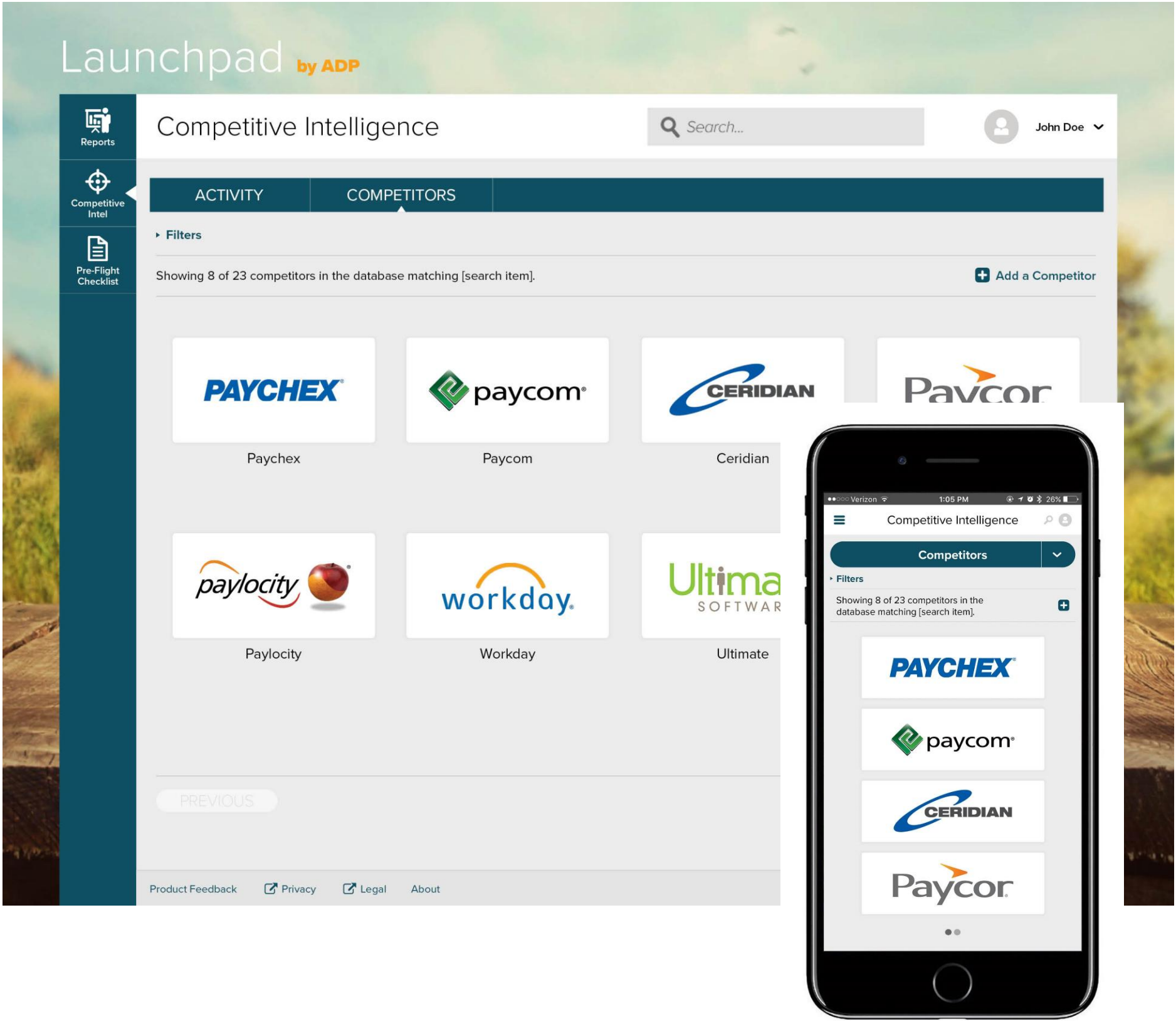
I then worked with the team in sprints, referencing stories in Jira, to implement and test, through til launch.



PRODUCT SUITE

SALES ENABLEMENT

Sales Predict was just one in a suite of Sales Enablement tools I worked on during my time at ADP.



Thanks for viewing!



I have many more samples where these came from. Please feel free to drop me a line to request more details, or a walkthrough of these.

I can be reached anytime at nicole@usablejungle.com, or at +1-917-267-8052.