



NICOLE FURI, SR. UX RESEARCHER/PRODUCT DESIGNER

USABLE JUNGLE LLC

2026 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

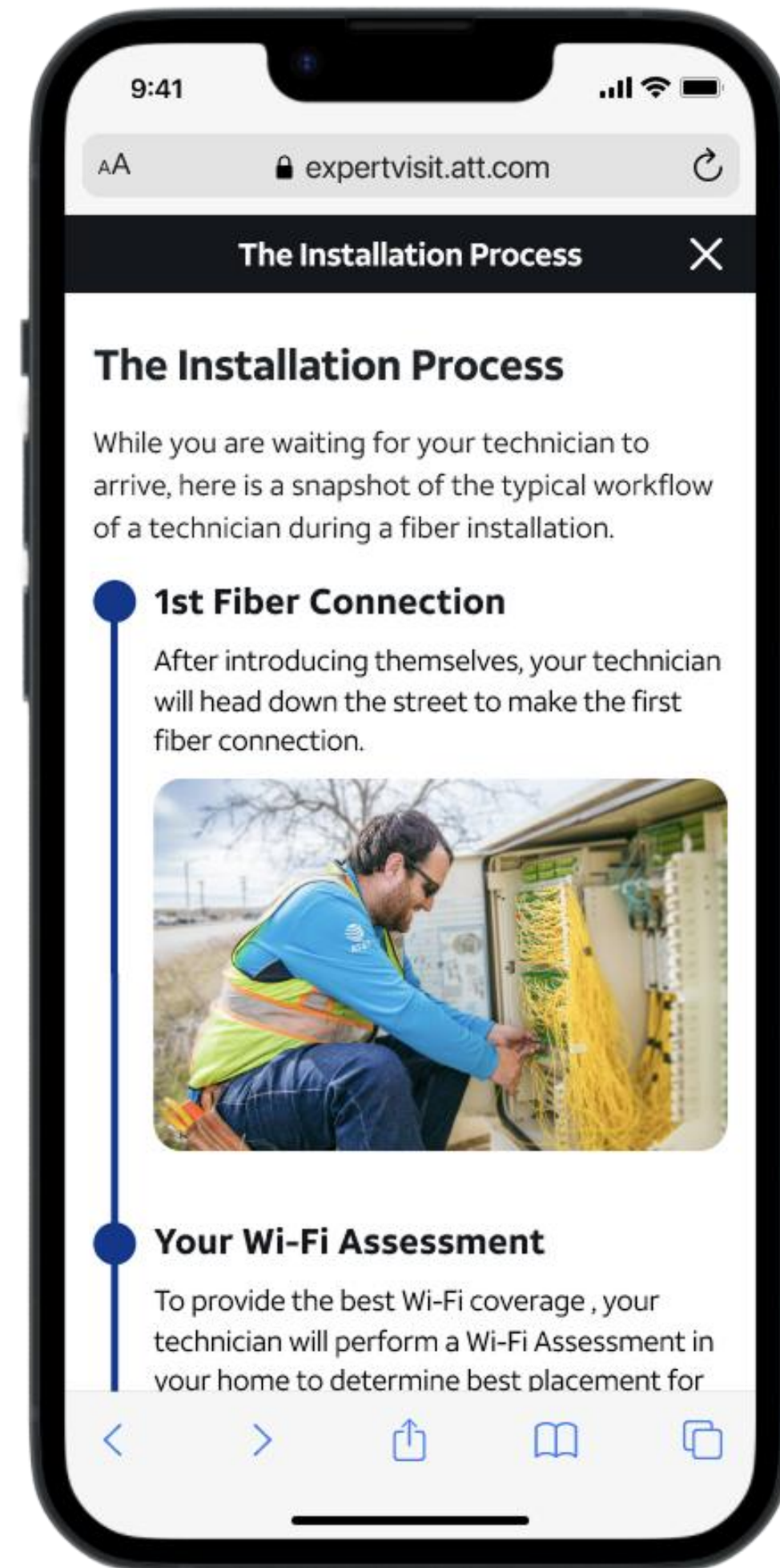
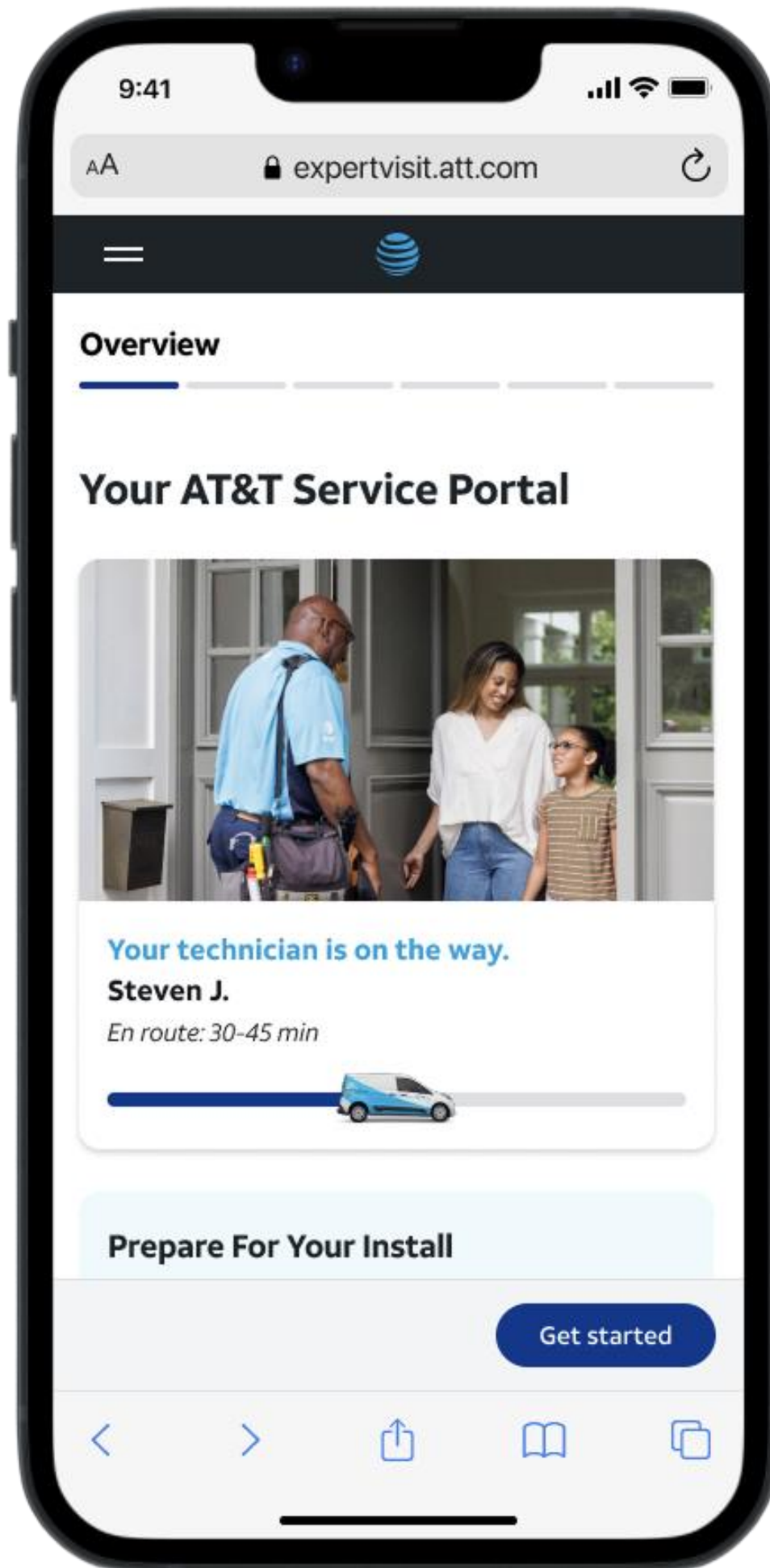
1

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.

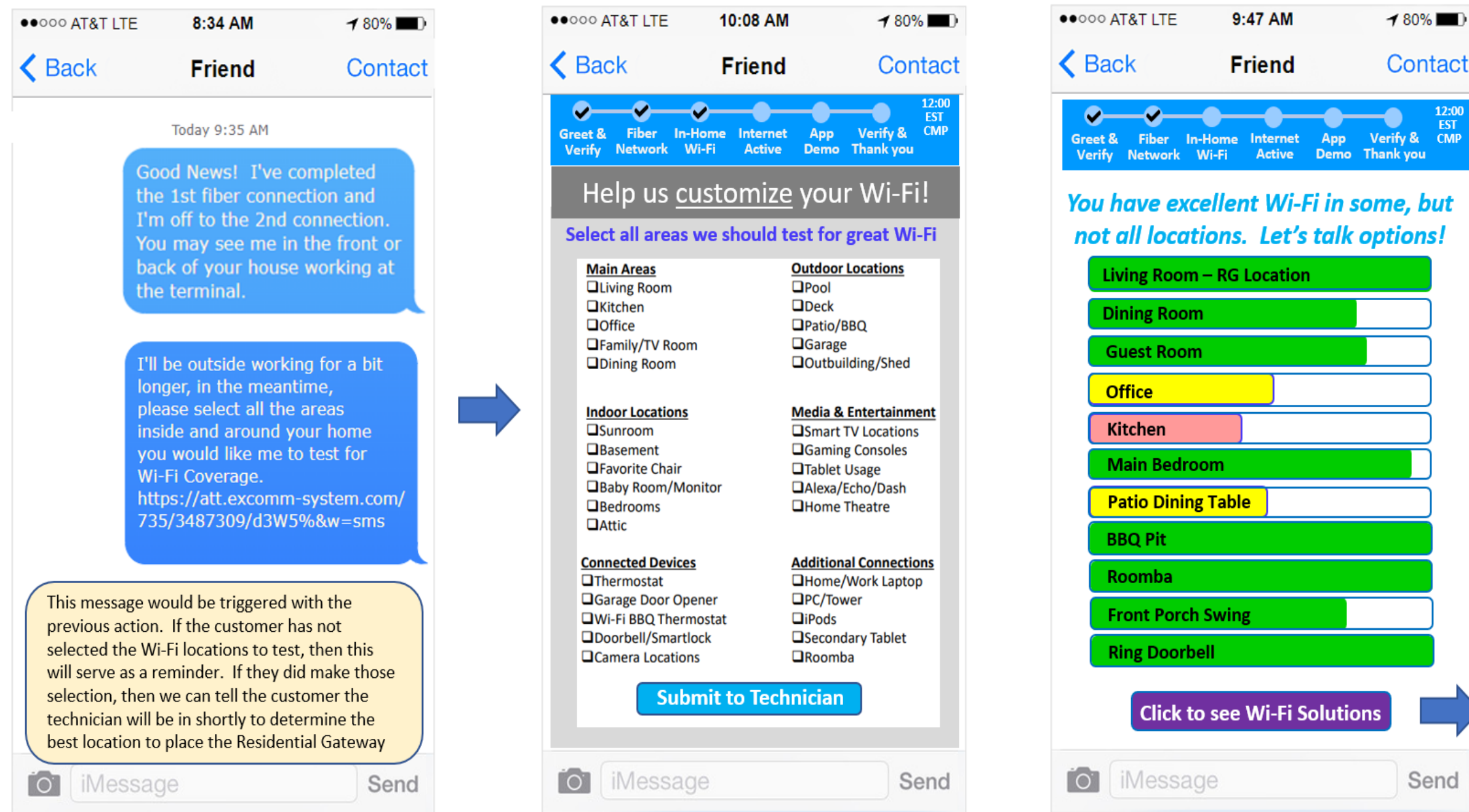
Problem: Communication between technicians and customers was often asynchronous and disjointed, and customers felt they did not have enough information to base decisions on regarding their fiber installation.

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.

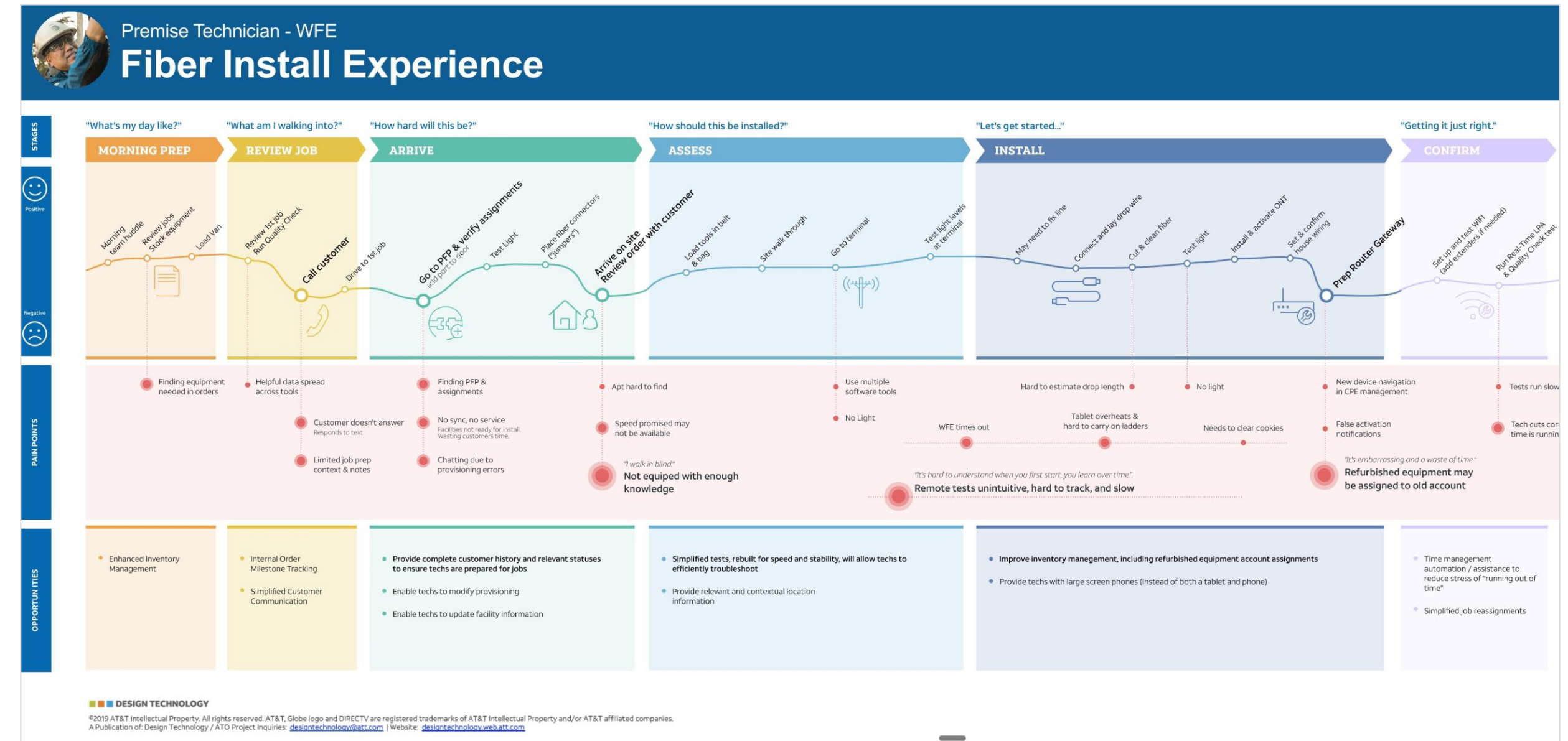
UX RESEARCH

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

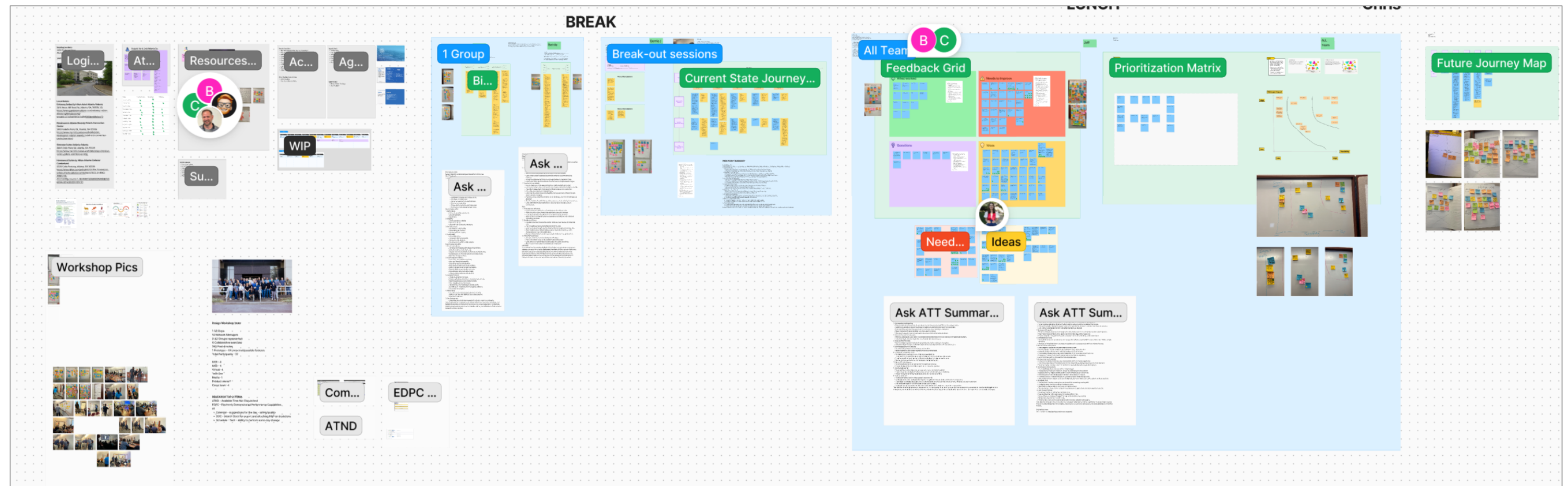
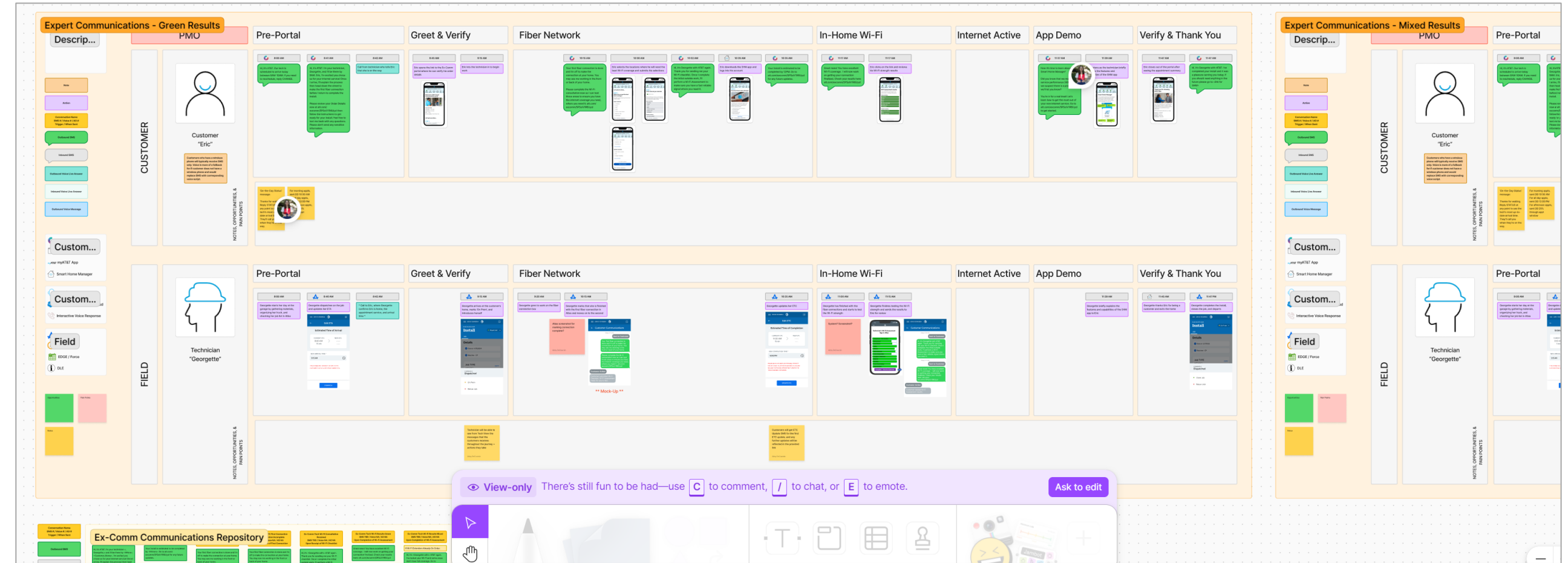
- Issues/confusion during Install (8%) 35/424**
- A few customers felt there wasn't any communication from their tech
 - Confusion around tech leaving the home
 - Had a bad experience with their install (damage, sloppy work, exposed wires)
 - "The installation took the entire day and there were several 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.

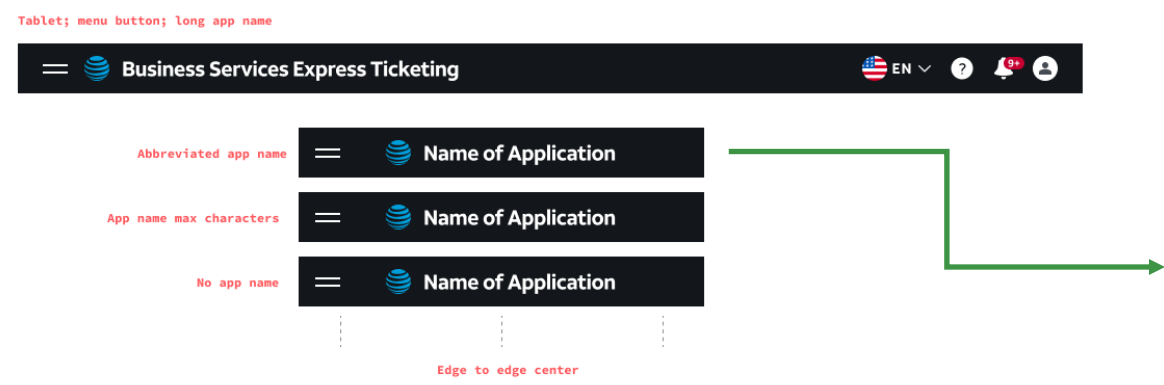
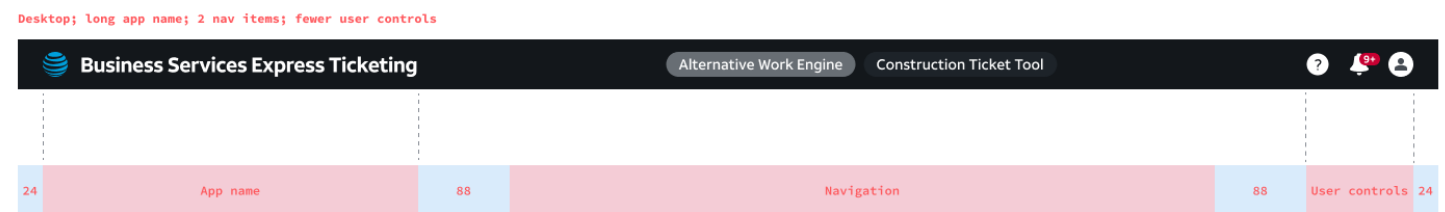
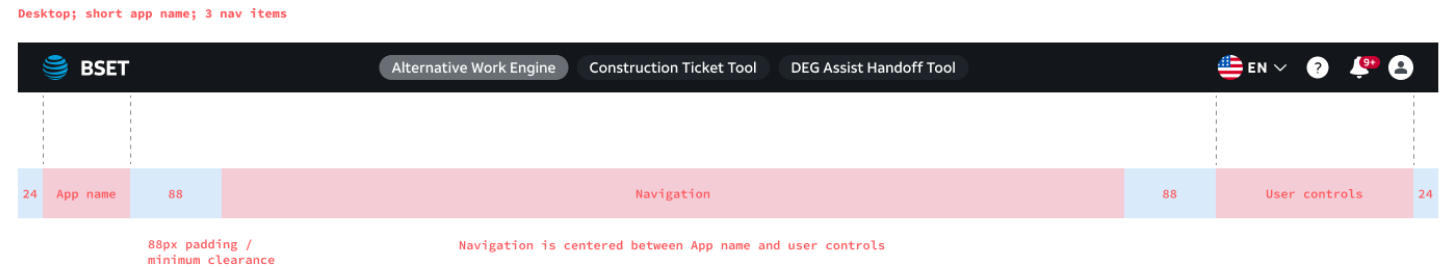


USAGE



Top bar navigation usage

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.



Base colors used in AT&T Fleet apps

Test	Color	Hex	Label
Blue	Blue	#0070C0	Blue
Dark Blue	Dark Blue	#005696	Dark Blue
Light Blue	Light Blue	#AEC6E0	Light Blue
Green	Green	#4CAF50	Green
Red	Red	#F44336	Red
Grey	Grey	#9E9E9E	Grey
White	White	#FFFFFF	White
Black	Black	#212121	Black

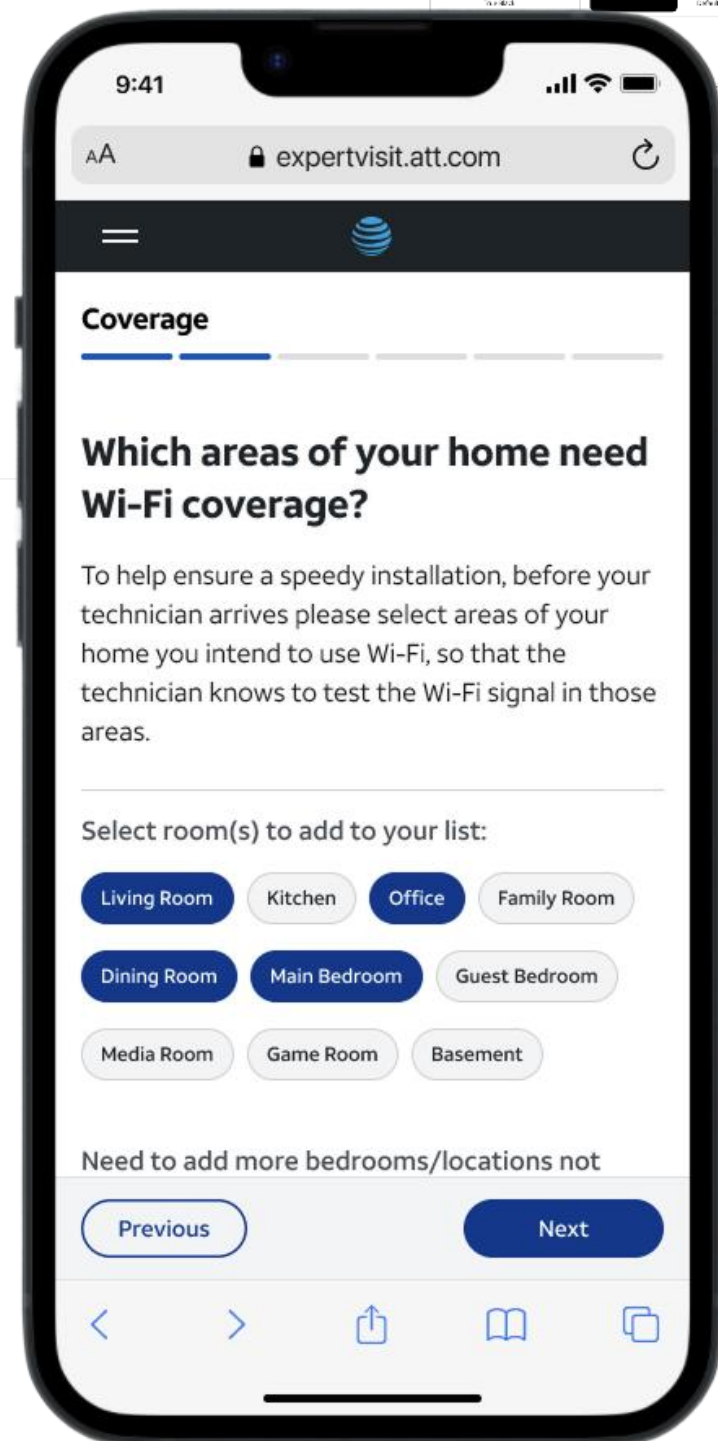
Interaction	Color	Hex	Label
Primary	Blue	#0070C0	Primary
Secondary	Light Blue	#AEC6E0	Secondary
Warning	Red	#F44336	Warning
Success	Green	#4CAF50	Success
Disabled	Grey	#9E9E9E	Disabled

Grayscale	Color	Hex	Label
Lightest	Lightest Grey	#F5F5F5	Lightest
Light	Light Grey	#E0E0E0	Light
Medium-Light	Medium-Light Grey	#CCCCCC	Medium-Light
Medium	Medium Grey	#9E9E9E	Medium
Medium-Dark	Medium-Dark Grey	#808080	Medium-Dark
Dark	Dark Grey	#4F4F4F	Dark
Darkest	Darkest Grey	#212121	Darkest

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.

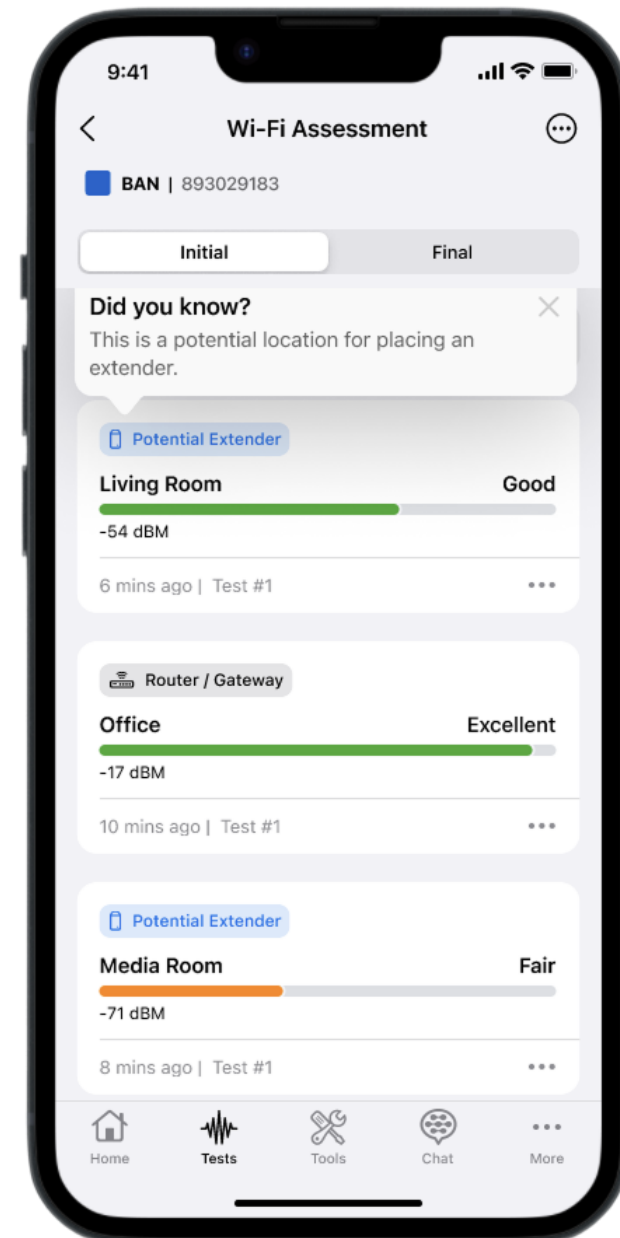
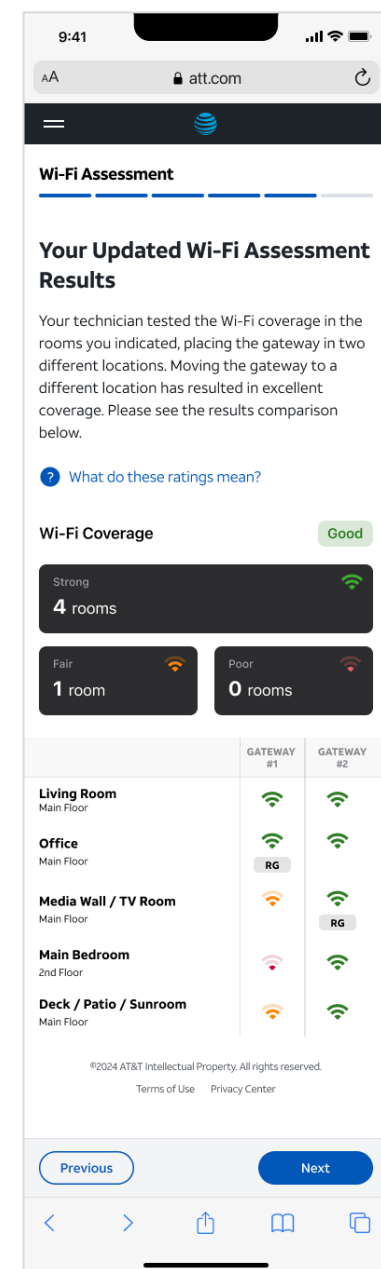
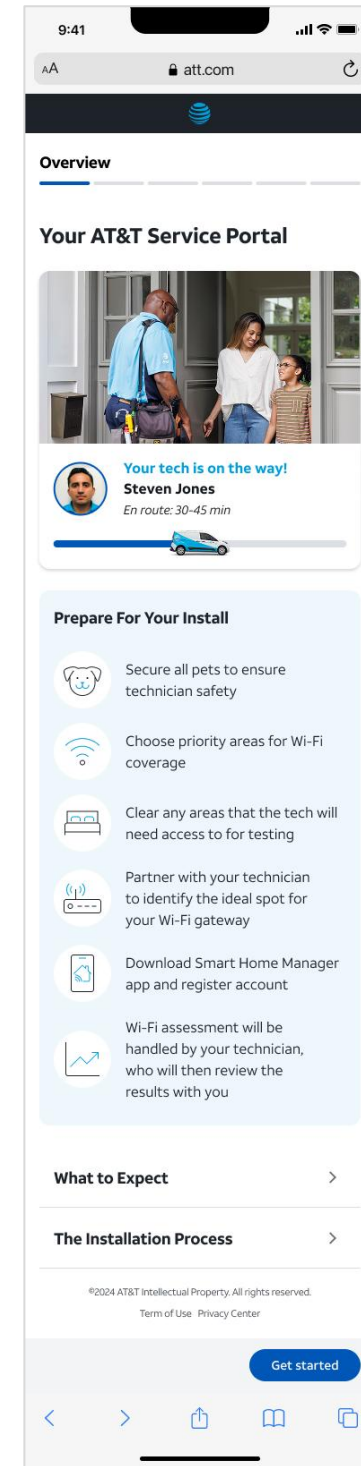
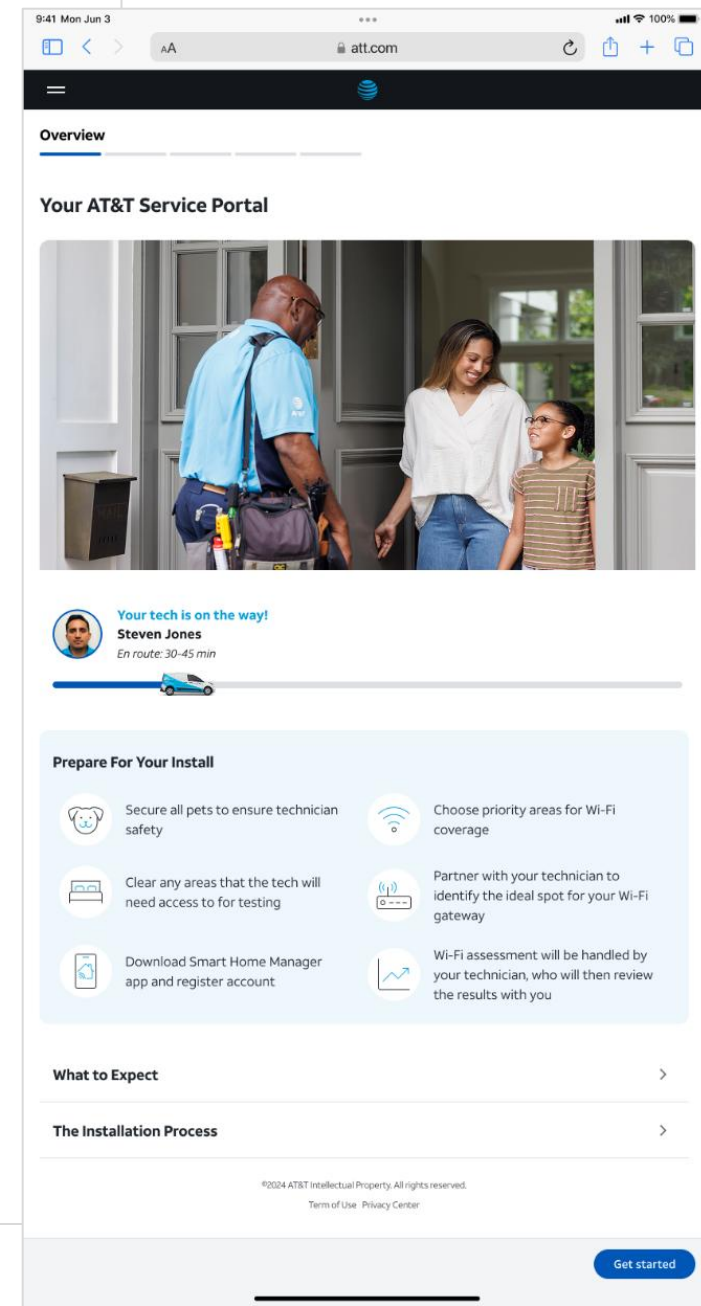
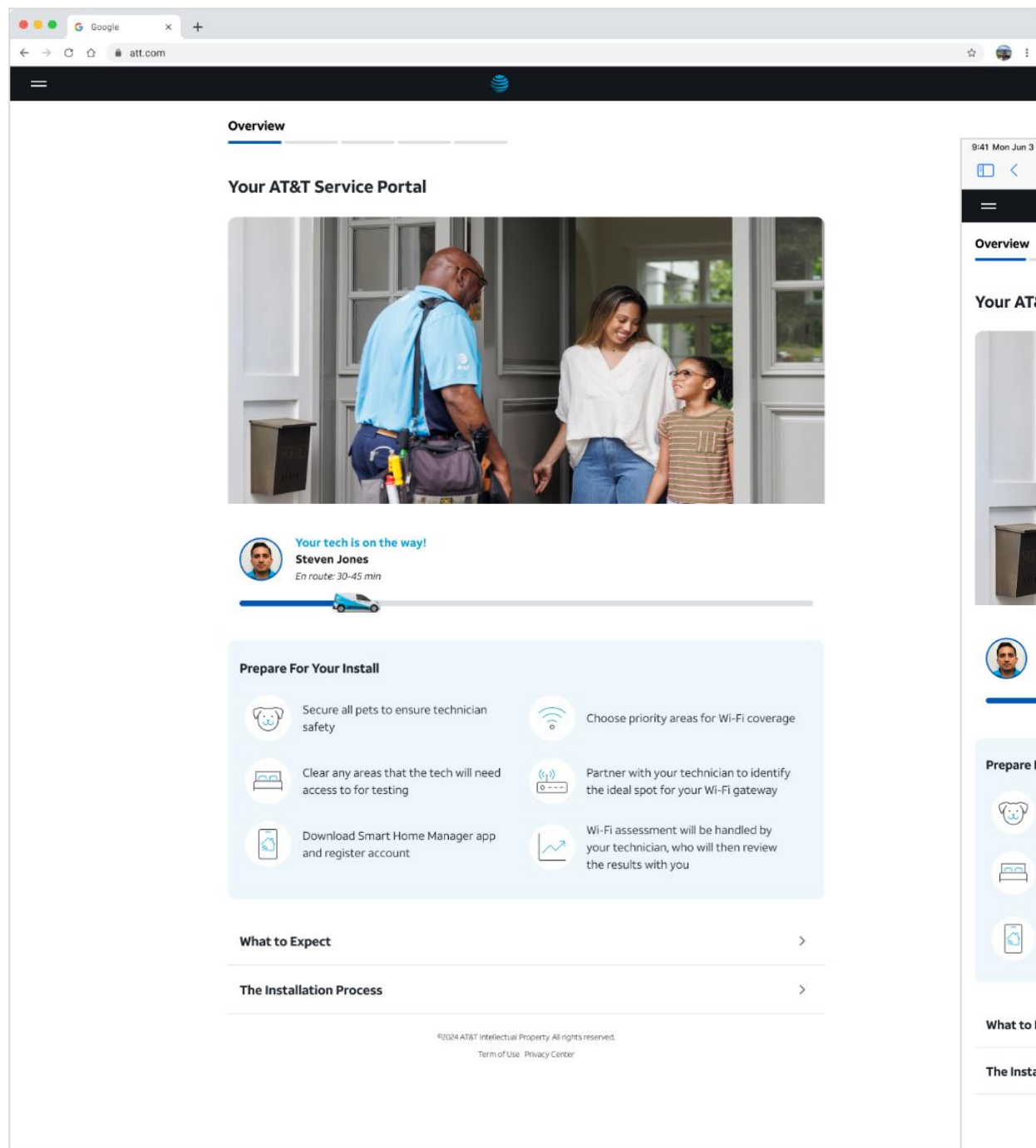


UX DESIGN ITERATION & PROTOTYPING

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.



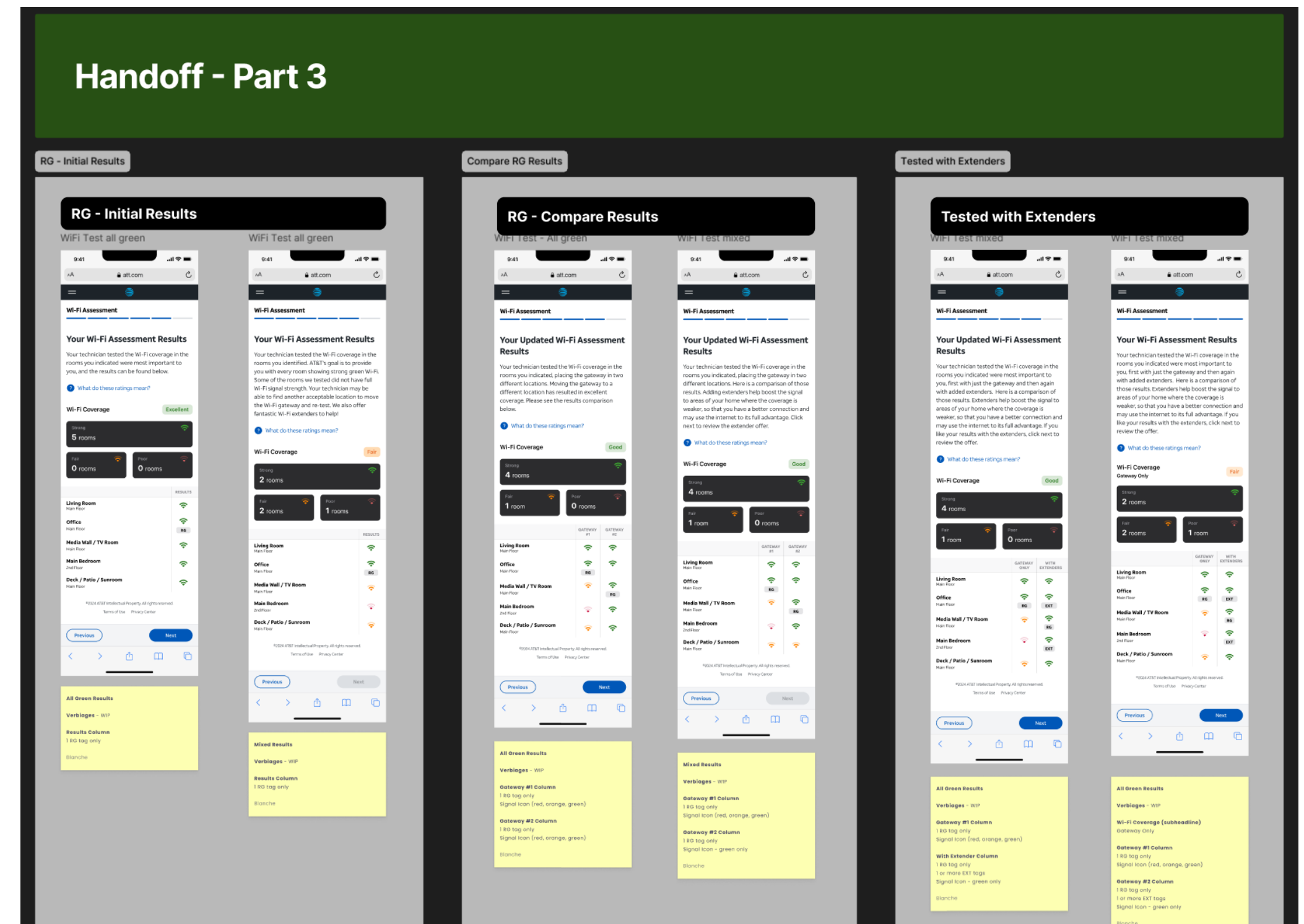
IMPLEMENTATION

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

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](#)

Order #	Vendor ID	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
3213-229216-01	CA0057	2001128-212	05/31/2012 09:13:13	Battery R&R	MI149AA	Open
3215-228654-01	LA184	1030094-299	05/31/2012 09:13:13	Tires	MI149AA	Open
3214-254987-01	TX015A	1030094-299	05/31/2012 09:13:13	Brakes	MI149AA	Open
3213-265478-01	CA0057	1030094-299	05/31/2012 09:13:13	Suspension	MI149AA	Open
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
3210-524987-01	CA0057	1030094-299	05/31/2012 09:13:13	Battery R&R	MI149AA	Open

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.

Good Morning **Alexander**

Today's Tasks

- Install** (Assigned)
 - BAN: 304938558
 - 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
- Repair** (Assigned)
 - BAN: 667984453
 - Fiber
 - 2:00 PM - 5:00 PM
 - 223 Riverside Dr, Spring Hill, TX 78221

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](#)

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

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 [Advanced Search](#)

[Export](#) [Print](#)

Showing 8 of 19 records for entered criteria

Invoice Number	Actions
3218-220524-01	View
3213-229216-01	View
3215-228654-01	View
3214-254987-01	View
3213-265478-01	View
3212-654789-01	View

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



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: 41074

you Refer AT&T 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	xfinity
Fastest speed available	5 GIG INTERNET	1 GIG INTERNET	1.2 GIG INTERNET
100% Fiber Network	✓	✗	✗
Equal upload and download speeds	✓	✗	✗
Unlimited internet data included	✓	✓	✓
Equipment fees included	✓	✓	✓



TEO Scheduler

TEOs [Quick Links](#) [Create New](#)

My TEOs [All Active TEOs](#)

View past due TEOs

Type to filter below

TEO NUMBER	OFFICE/CLLI	MORE
287375	ALPRGAED	View
287375	ALPRGAED	View
287375	ALPRGAED	View
287375	ALPRGAED	View
287375	ALPRGAED	View
287375	ALPRGAED	View
287375	ALPRGAED	View

2

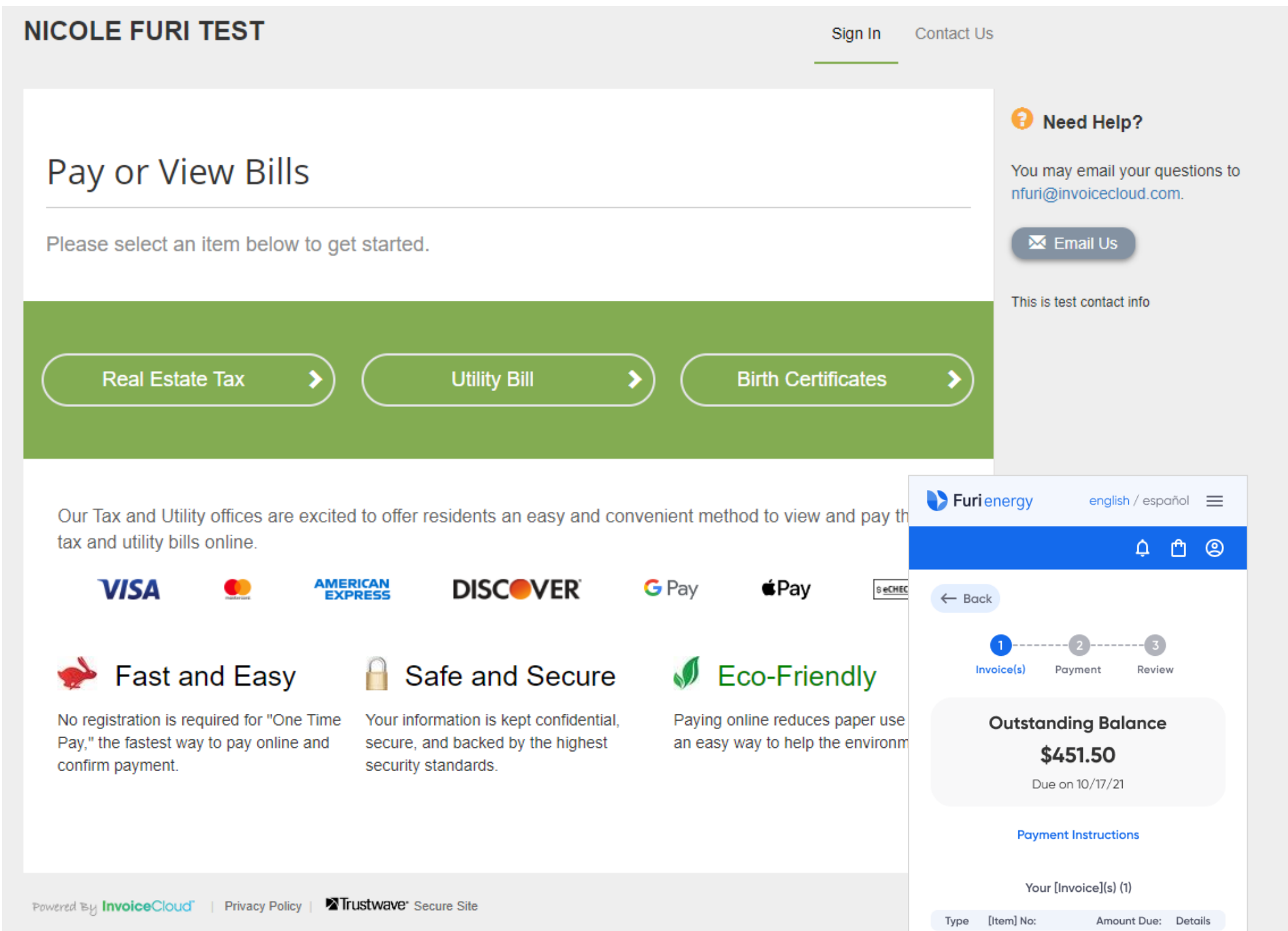
PROJECT: INVOICE PAYMENT APPLICATION

CLIENT: INVOICE CLOUD

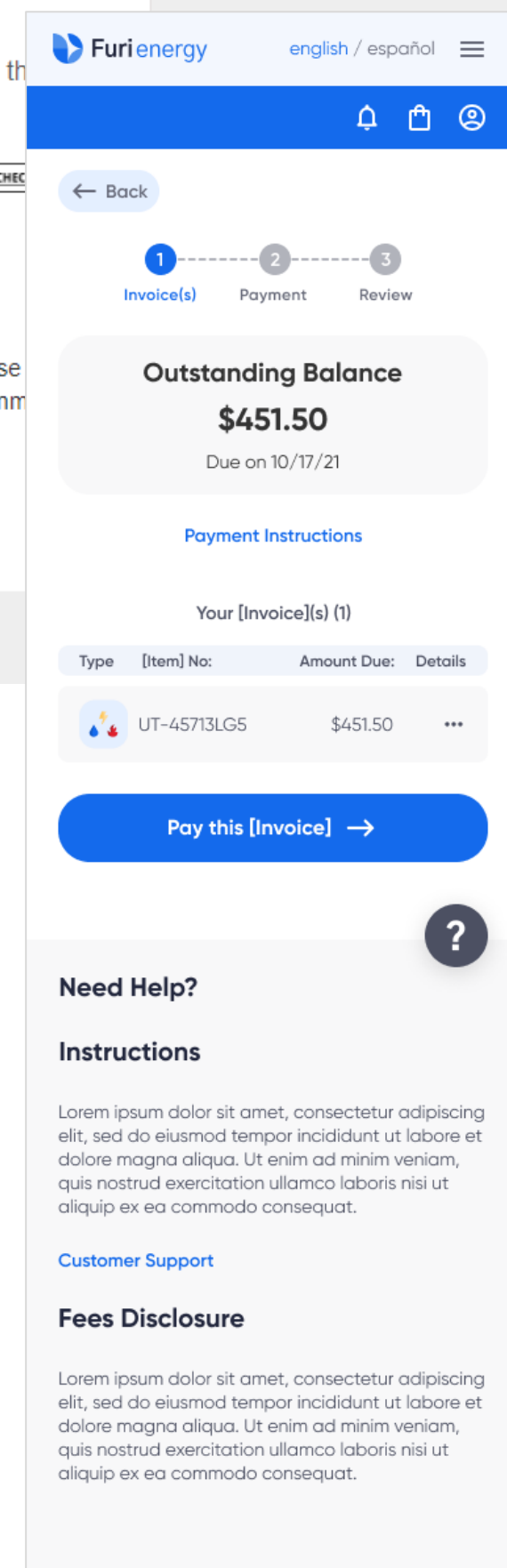
InvoiceCloud®



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

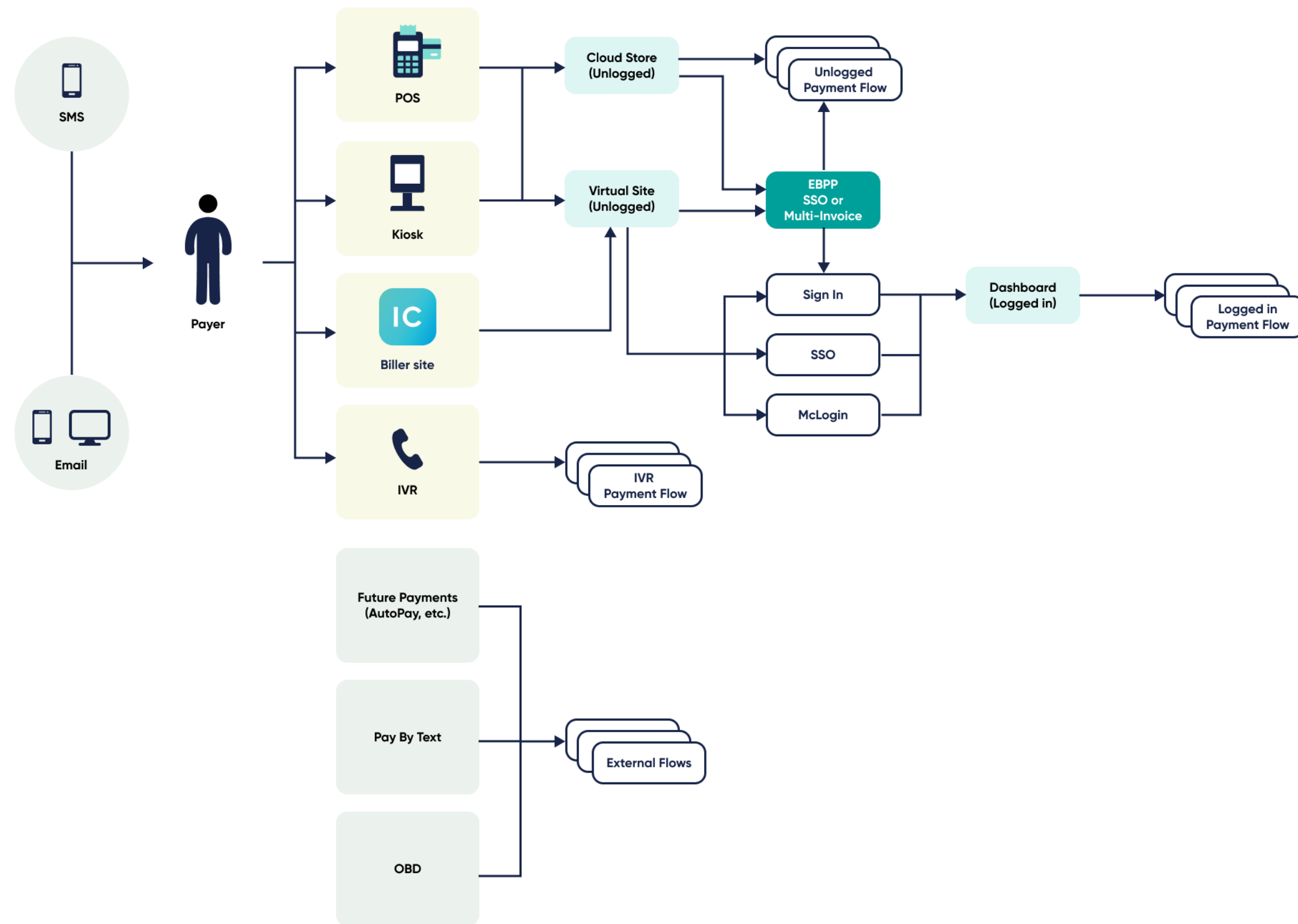
Project: UX Research and Product Design for a redesign of a legacy EBPP/SaaS application used to present and collection payment on invoices for government utility companies.

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.

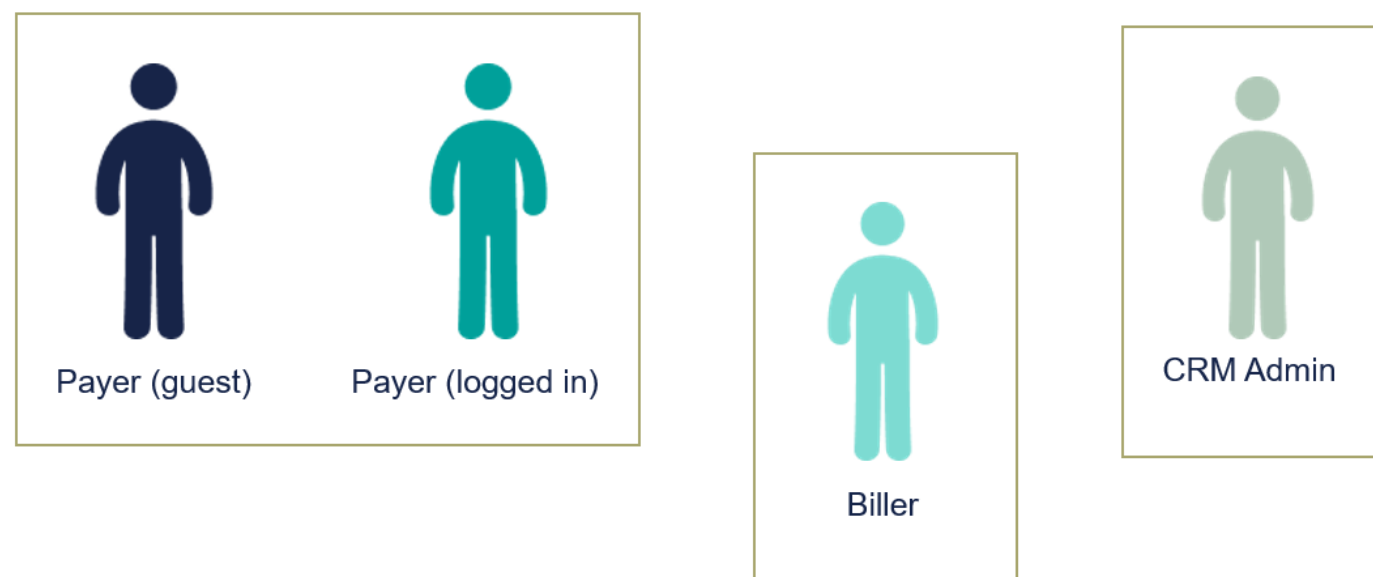
Environment: Low UX maturity and an engineering driven culture which required constant evangelization.

UX RESEARCH

QUALITATIVE & QUANTITATIVE

To start I instituted a quarterly UX research effort, in which I recruited representative users on both the Biller and Payer sides to a customer research panel; I sent out a survey with questions based on the SUPR-Q measurement that could be repeated and tracked over time; I collected open-ended feedback via an in-app widget; and I performed interviews with a selection of users for additional qualitative feedback.

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.



Handle to slide in and out from right sidebar

FEEDBACK

I'd love your 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):

☹️ ☹️☹️ ☹️☹️☹️ 😊 😊😊

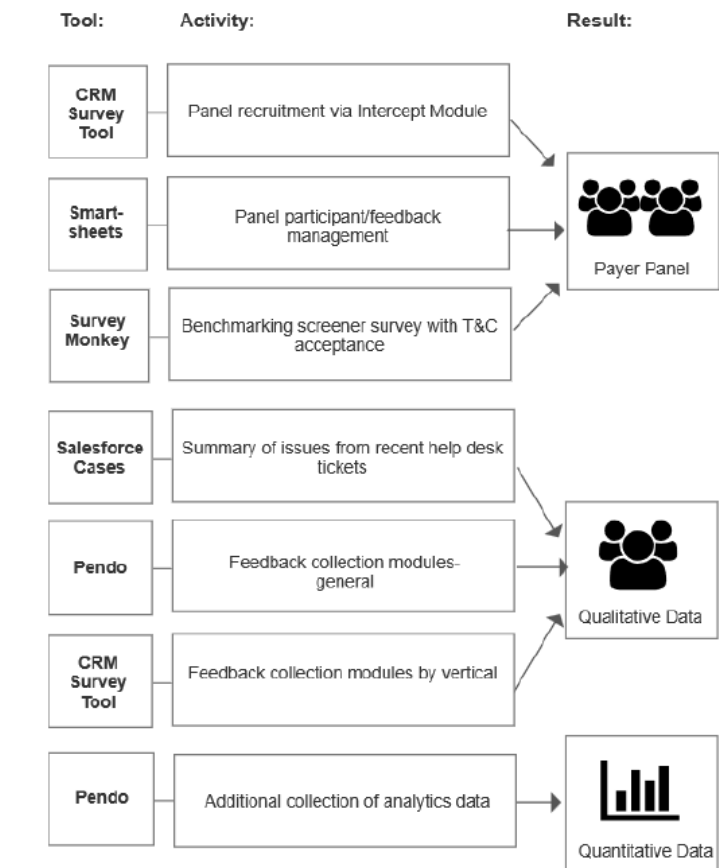
2. Let us know your feedback:

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

Cancel Send

Snapshot of Q2 Payer UX Research Activities

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.



Confidential and Proprietary

UX Dashboard- aggregated

Biller metrics 2022

Billor Role

990 Responses - 3% Response Rate

Role	Votes	Percentage
Customer Support	374	37.8%
Finance/Accounting	361	36.5%
IT/Admin/Analyst	128	12.9%
Other (fill in below)	103	10.4%

Poll Results (Biller Tasks- IT/Admin/Analyst)

7 Responses - 16% Response Rate

Check how many customers opted out of paperless.

1885-1
May 26, 2022 - 4:07:26 PM EDT

check data pump
836-4923
May 26, 2022 - 10:02:05 AM EDT

Check for payment, autopsy and paperless billing errors and pending enrollments. Check to see if autopsy is still running.

836-4920
May 24, 2022 - 9:43:23 AM EDT

Poll Results (Biller Tasks- Cust Support)

19 Responses - 7% Response Rate

payments
2660-8
May 25, 2022 - 11:55:36 AM EDT

invoice cloud
2613-269
May 25, 2022 - 7:54:44 AM EDT

NOT TO ANSWER QUESTION
2613-157
May 24, 2022 - 1:45:49 PM EDT

Poll Results (Biller Tasks- Impl/Proj Mgr)

3 Responses - 27% Response Rate

Set Up Training Sessions
3204-1
May 27, 2022 - 11:05:01 AM EDT

review/download pmt information
2621-2
May 23, 2022 - 11:08:19 AM EDT

Review cstatus for a submitted case.
3019-59
May 23, 2022 - 10:55:59 AM EDT

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).

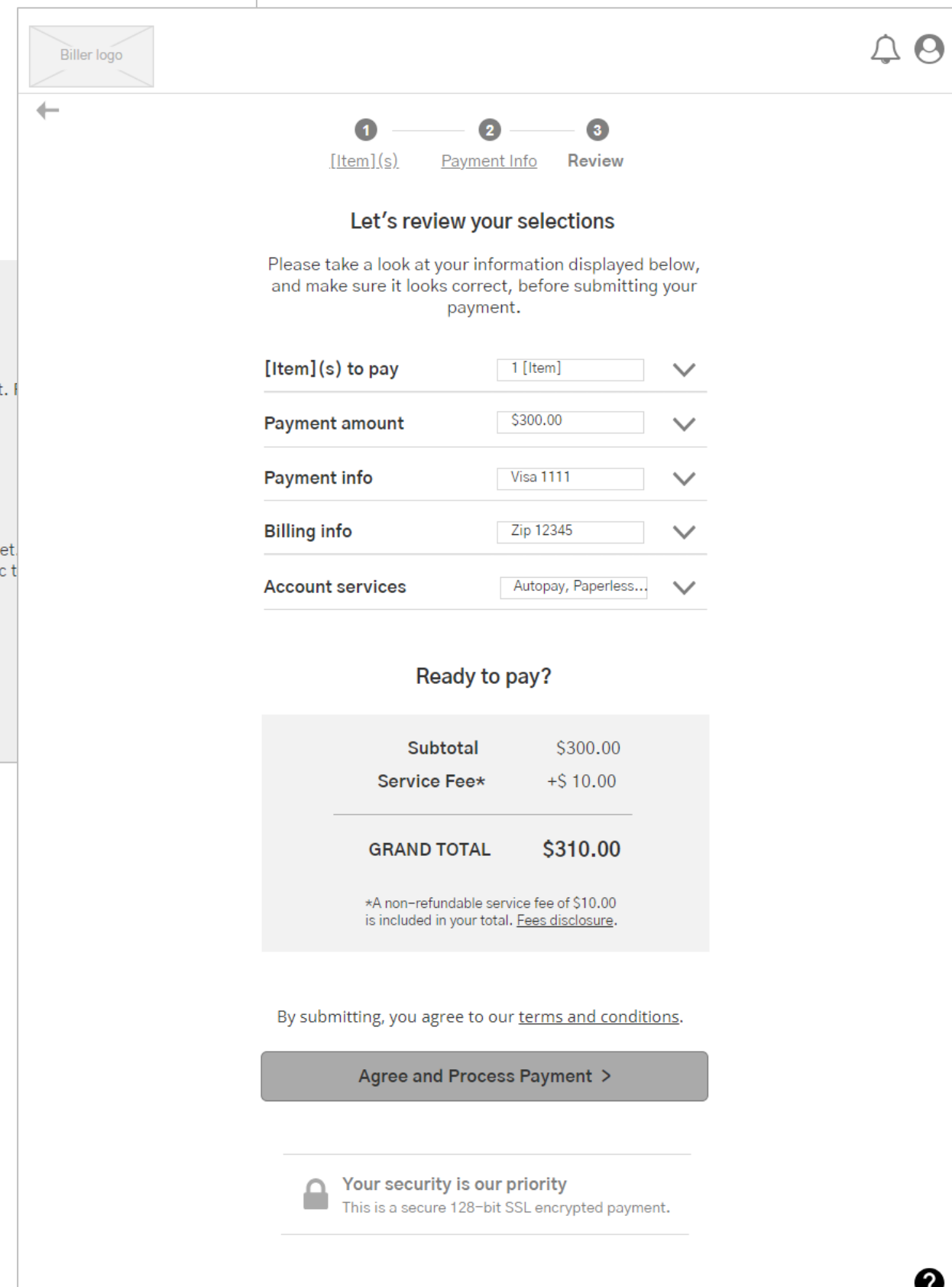
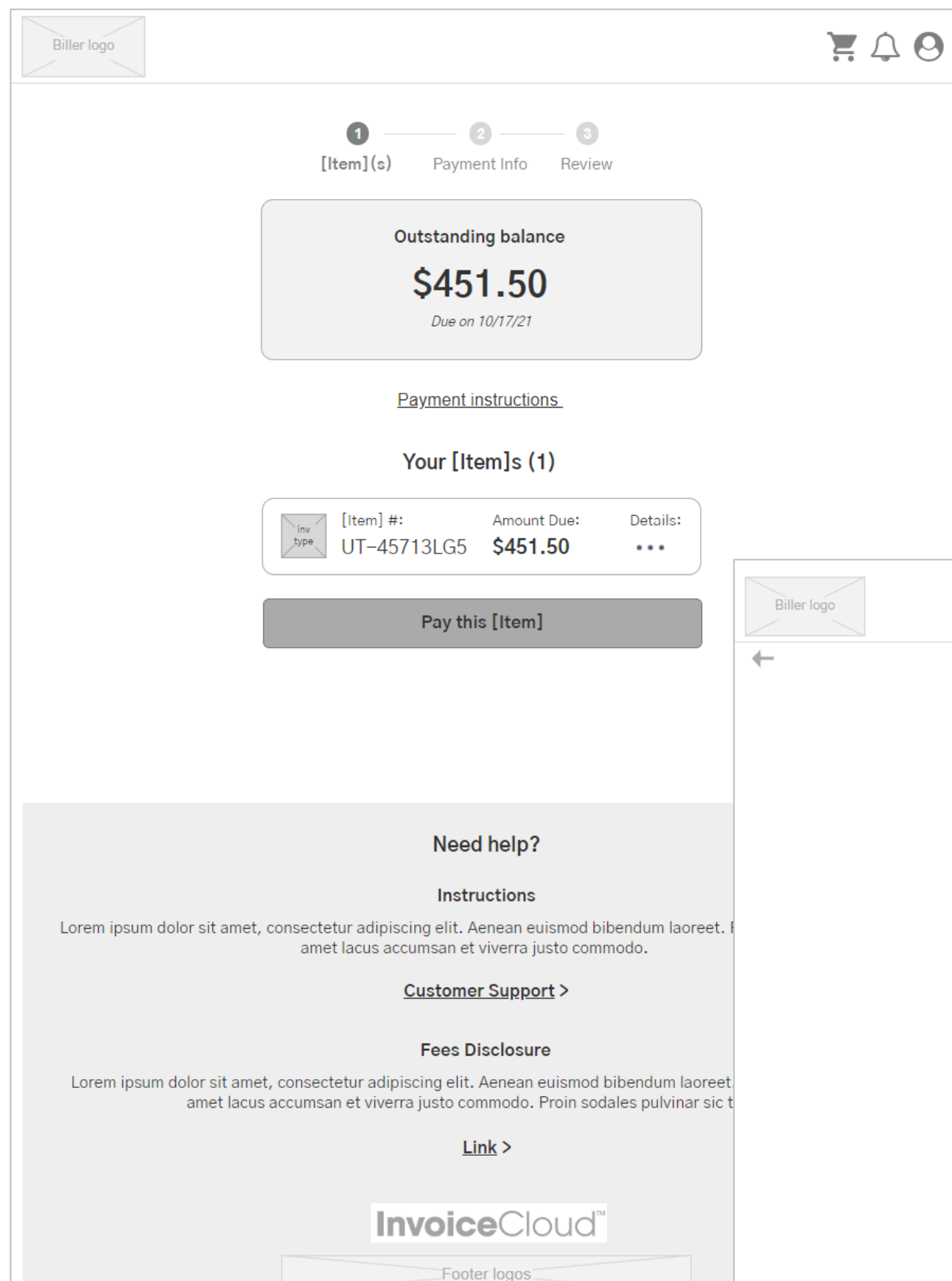
Round 1 (low fidelity):

[Prototype link](#)

Round 2 (high fidelity):

[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.

Primary Button

A page layout or component should contain a single prominent button that makes it clear that other buttons have less importance in the hierarchy. This high-emphasis button commands the most attention. Styles overwritten at theme level.

Current Version - Inaccessible

```
font-family: Helvetica;
font-size: 18px;
text-color: #ffffff;
border-radius: 24px;
button-height: 48px;
icon-size: 18px;
button-color-blue: #1B417D;
hover-color-blue: #1F61B3;
button-color-green: #83BC52;
hover-color-green: #8F9A3C;
```

Primary Button

A page layout or component should contain a single prominent button that makes it clear that other buttons have less importance in the hierarchy. This high-emphasis button commands the most attention. Styles overwritten at theme level.

Proposed New Version - Accessible

```
font-family: arial, san-serif;
font-size: 14px;
text-color: #ffffff (ic-neutral-0);
border-radius: 24px;
button-height: 48px;
icon-size: 16px;
btn-color-blue: #133A6B (ic-blue-70);
hover-color-blue: #1F61B3 (ic-blue-50);
mouse-down-color-blue: #194EBF (ic-blue-60);
btn-color-green: #3E9347 (ic-green-60);
hover-color-green: #88E3B0 (ic-green-80);
btn-color-disabled: #E9E9E9 (ic-neutral-10);
btn-disabled-text-color: #545454 (ic-neutral-70);
```

<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

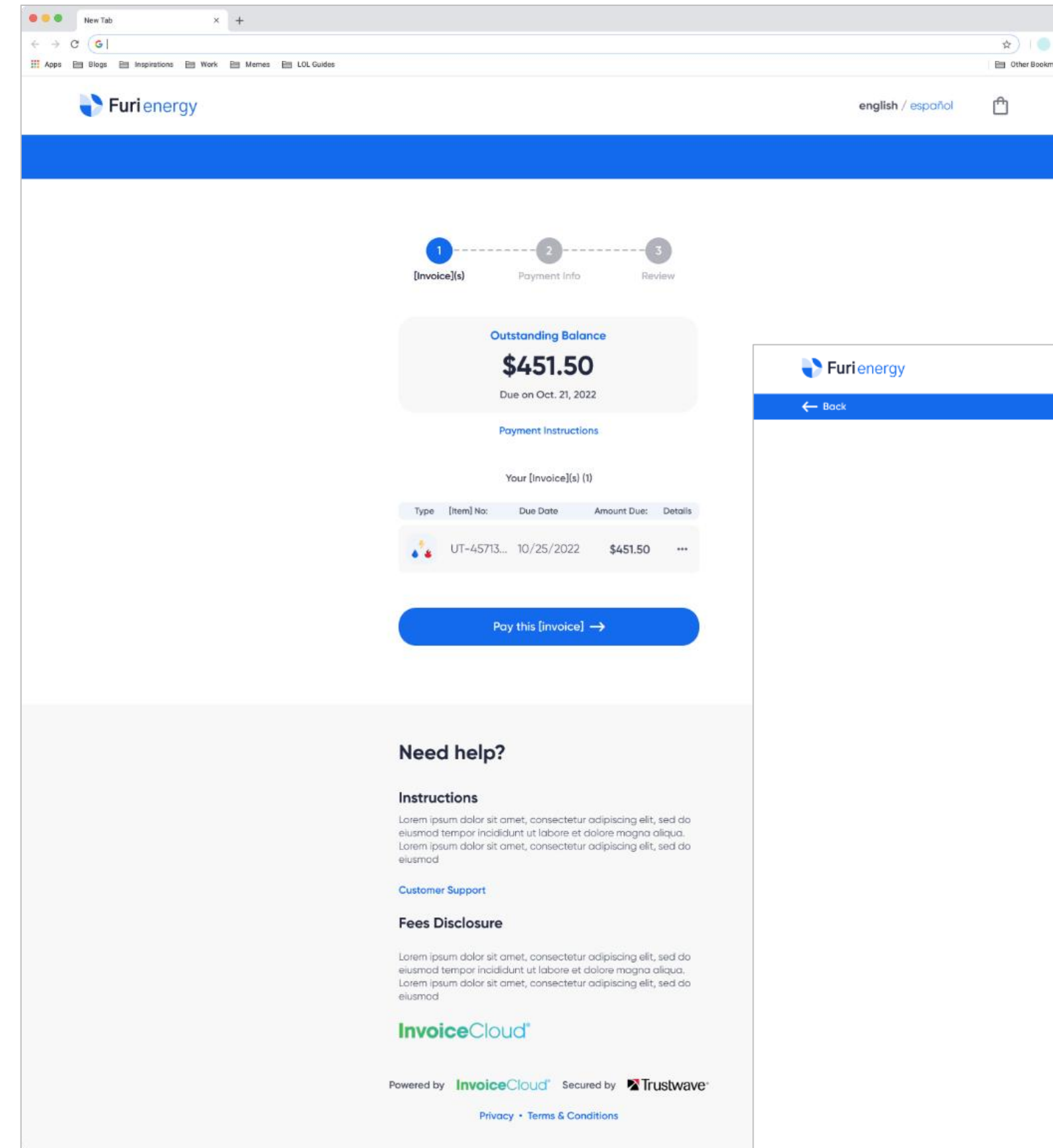
IMPLEMENTATION

AGILE SCRUM

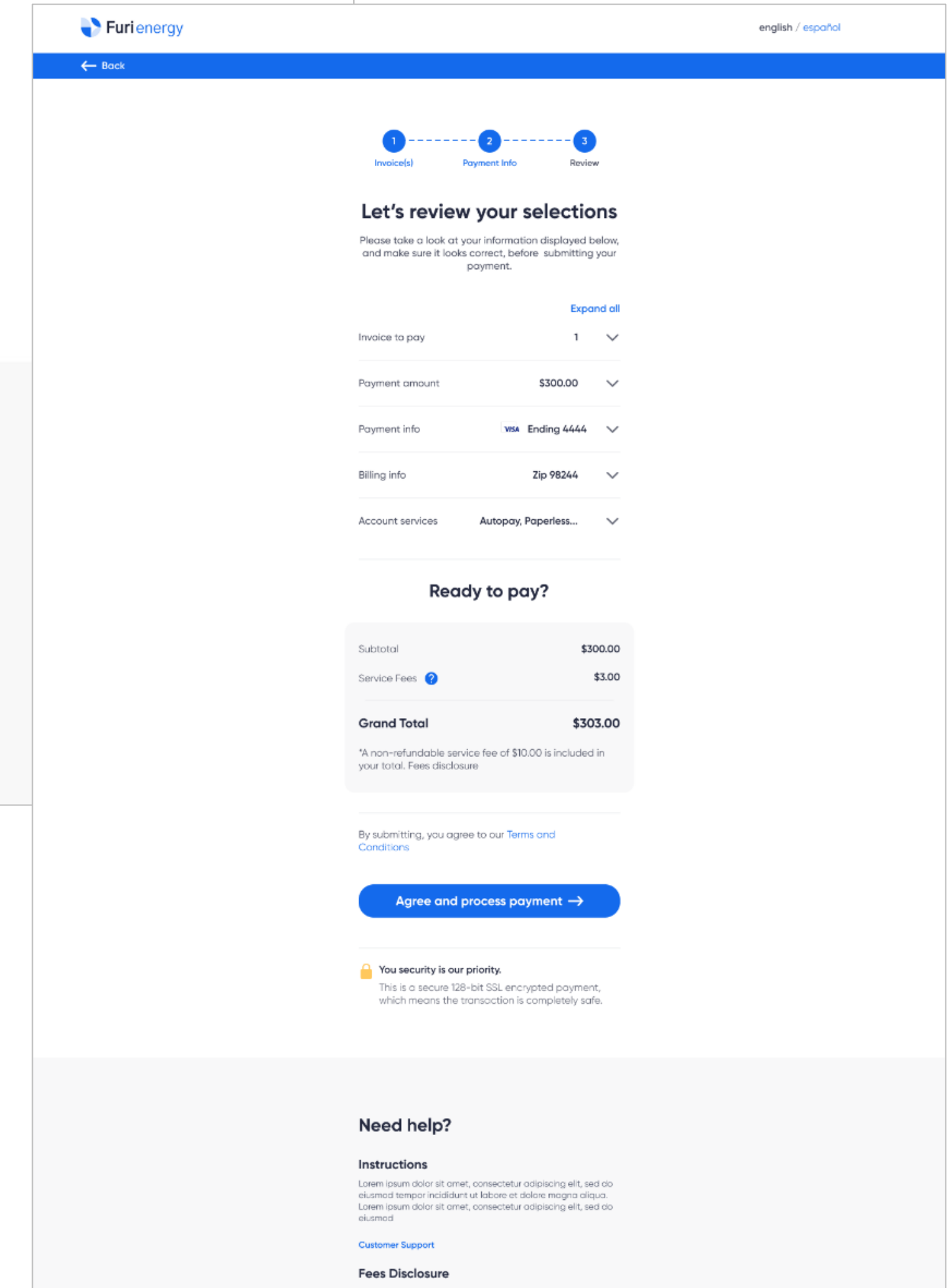
Eventually we had a solid user flow, and converted the wireframes into high fidelity mockups in Figma. These incorporated the new design library components.

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.



InvoiceCloud®



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. Deliver first iteration of data warehouse which enables adoption reporting and analysis of key drivers.	Program designed by 4/1 including KPIs for remainder of year Available to build reports by 7/1. Reports built by 9/1.	Operations 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.

Furienergy | Help & Support | Nicole Furi

Real Estate Tax | 22 Address Street | Ref: 4819445

Overview | Invoices & Payments | Services | Account Settings

Account balance
Total Balance Due: \$541.40 | Past Due Amount: \$179.50

Account services
Autopay: Enrolled | Paperless billing: Enrolled | Pay by text: Not enrolled

Help section here
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Powered by InvoiceCloud | Secured by Trustwave

InvoiceCloud | What are you looking for?

Files Dashboard
You have 2 file(s) with critical errors needing attention. Files with errors are highlighted in red in the list below.

Upload new file(s)

INVOICE FILES (57) | PDFs (63) | ADJUSTMENT FILES (27) | PAYMENT FILES (16)

Uploaded File	Parts	Process Status	Review Status	Import Status
SeptWaterBills.zip 09/29/2022 13:01p EST via FTP	---	<ul style="list-style-type: none"> Uploaded Unzipped Splitting/Merging Conversion pending 	<ul style="list-style-type: none"> Review not started 	---
AugWaterandTax.zip 08/28/2022 12:32p EST via Chrome browser	1	<ul style="list-style-type: none"> CONV1 Invoicefile.ext Invoice count: 58 Invoice volume: \$58000 	<ul style="list-style-type: none"> Validated 4 errors, 3 warnings 	<ul style="list-style-type: none"> Release approved Import error
	2	<ul style="list-style-type: none"> CONV2 Invoicefile2.ext Invoice count: 72 Invoice volume: \$72000 	<ul style="list-style-type: none"> Validated 2 errors, 1 warning 	<ul style="list-style-type: none"> Release approval Import not started
	3	<ul style="list-style-type: none"> CONV3 Invoicefile3.ext Invoice count: 118 Invoice volume: \$118000 	<ul style="list-style-type: none"> Validated 1 error 	<ul style="list-style-type: none"> Release approved Imported
	4	<ul style="list-style-type: none"> CONV4 Invoicefile4.ext Invoice count: 36 Invoice volume: \$36000 	<ul style="list-style-type: none"> Validated 1 error, 2 warnings 	<ul style="list-style-type: none"> Release approved Imported
	5	<ul style="list-style-type: none"> CONV5 Invoicefile5.ext Invoice count: 58 Invoice volume: \$58000 	<ul style="list-style-type: none"> Validated 3 errors 	<ul style="list-style-type: none"> Release approved Imported
	6	<ul style="list-style-type: none"> CONV6 Invoicefile6.ext Invoice count: 72 Invoice volume: \$72000 	<ul style="list-style-type: none"> Validated 1 error 	<ul style="list-style-type: none"> Release approved Imported
	7	<ul style="list-style-type: none"> CONV7 Invoicefile7.ext 	<ul style="list-style-type: none"> Validated 1 error 	<ul style="list-style-type: none"> Release approved

Powered by InvoiceCloud | Privacy Policy | Trustwave Secure Site

InvoiceCloud | What are you looking for?

Manage Roles

ADD NEW ROLE

Show: Active Roles | Search: Enter keyword

ROLE NAME	ROLE DESCRIPTION	USERS
Super Admin	Master Access- Internal	3
Admin	Master Access- External	22
CSR	Customer Support	156
[Role]	[Description]	358
[Role]	[Description]	549

How Can We Help You?
AutoPay | Manage Your AutoPay Enrollment

Browse by Solution
Articles | Documentation | FAQs | Developers \ APIs | Training Videos | Marketing Resources | Account Services Management | Enroll in Live Training | Customer Support

Browse Our Knowledge Center
AutoPay, Bill Processor, Billing, Chargebacks, Cloud Pay, Cloud Store, Contact Us, Customers, Data Pump, Deposit Reconciliation, EFT/ACH Rejects, Email Templates, Files, Invoices, Kiosk, Logo Images, Marketing, One-Time Payments, Online Bank Direct, Open Batch, Paperless, Pay By Text, Payment Reconciliation, Payments, PDFs, Real Time Data Refresh, Reconciliation, Recurring Scheduled Payments, Reports, Sales, Scheduled Payments, Scheduled Reports, Search, Setting, Settled Batch, Support Central, Technical Specifications, Training, User Management

Still not finding what you need?
Submit a Support Ticket

InvoiceCloud | Privacy Policy | Product | Resources | Company | Contact Us

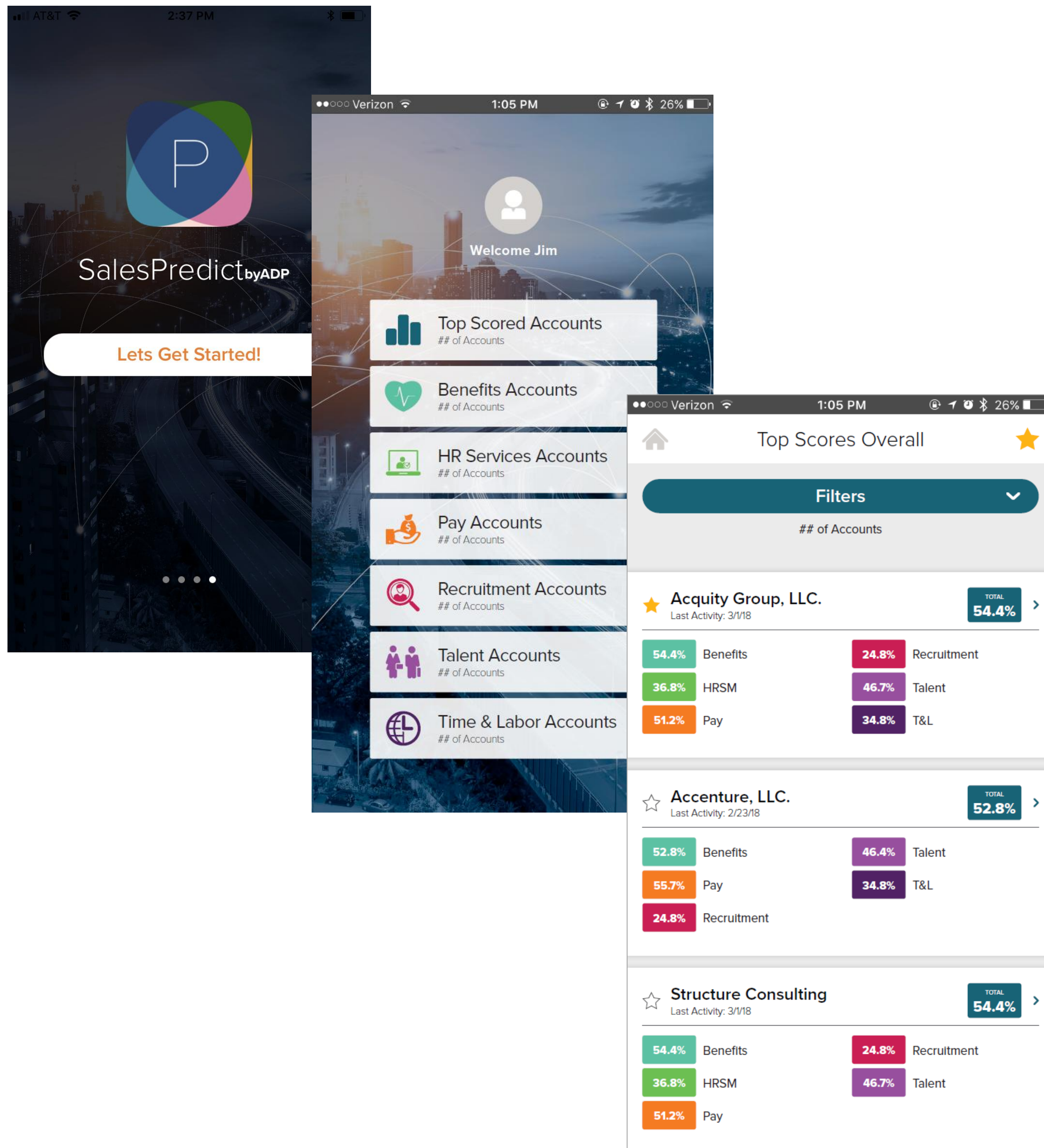
3

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.

Additionally, I looked at the Jobs to Be Done for each persona.

DM Personas

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

Persona

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-base
 - 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

User Personas			App Value Prop		
SBS			Sales Predict		
Jobs	Pains	Gains	Pain Relievers	Gain Creators	UX Notes
<ul style="list-style-type: none"> • Prepare to approach leads 	<ul style="list-style-type: none"> • Don't have reliable indicators of interest from the leads, or talking points 	<ul style="list-style-type: none"> • Converting leads 	Scores leads by their indication of interest in various subject areas	<ul style="list-style-type: none"> • Offers the ability to access valuable information in a mobile format, along with talking points 	<ul style="list-style-type: none"> • Need to revisit the rollout strategy with marketing, training • Need to validate the assumption that this data is accurate • Need to get feedback from reps who have piloted

DM Personas

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

Persona

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



A more human resource.™

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 multibound) Newsletter sign-ups
Improve lead conversion	Conversion rate between newsletter sign ups and sales Conversion rate between content downloads and sales Sales cycle time for leads that touch content
Improve retention	Percentage of existing customers who opt-in to receive content
Improve web traffic	Referer pages 404's Content

Author	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	
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	

Content Strategy docs



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3. Devise Structure

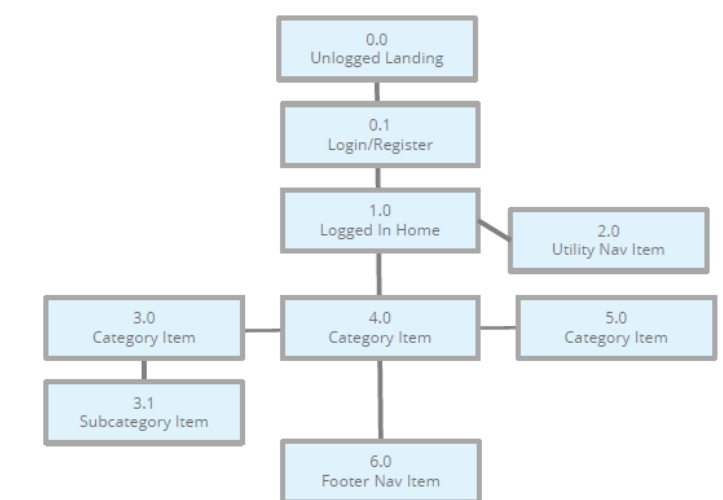
Plan and map out the hierarchy of screens under a task-based navigation system

Global Navigation:
Home | Task1 | Task2 | Task3

Utility Navigation:
Search | Support | My Account

Footer Navigation:
Contact | T&C | Privacy

Navigation Structure & Labeling



Site Map

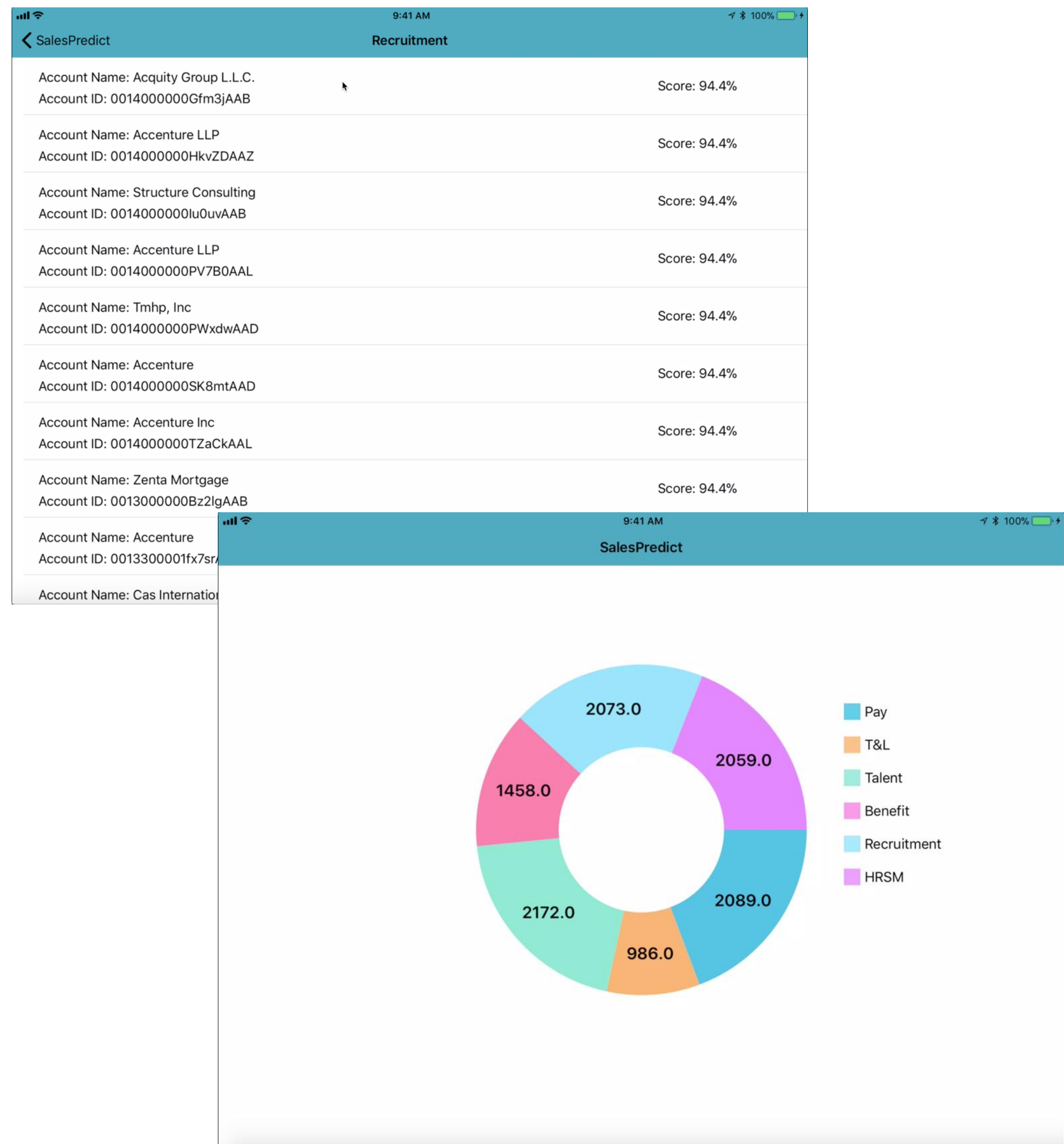


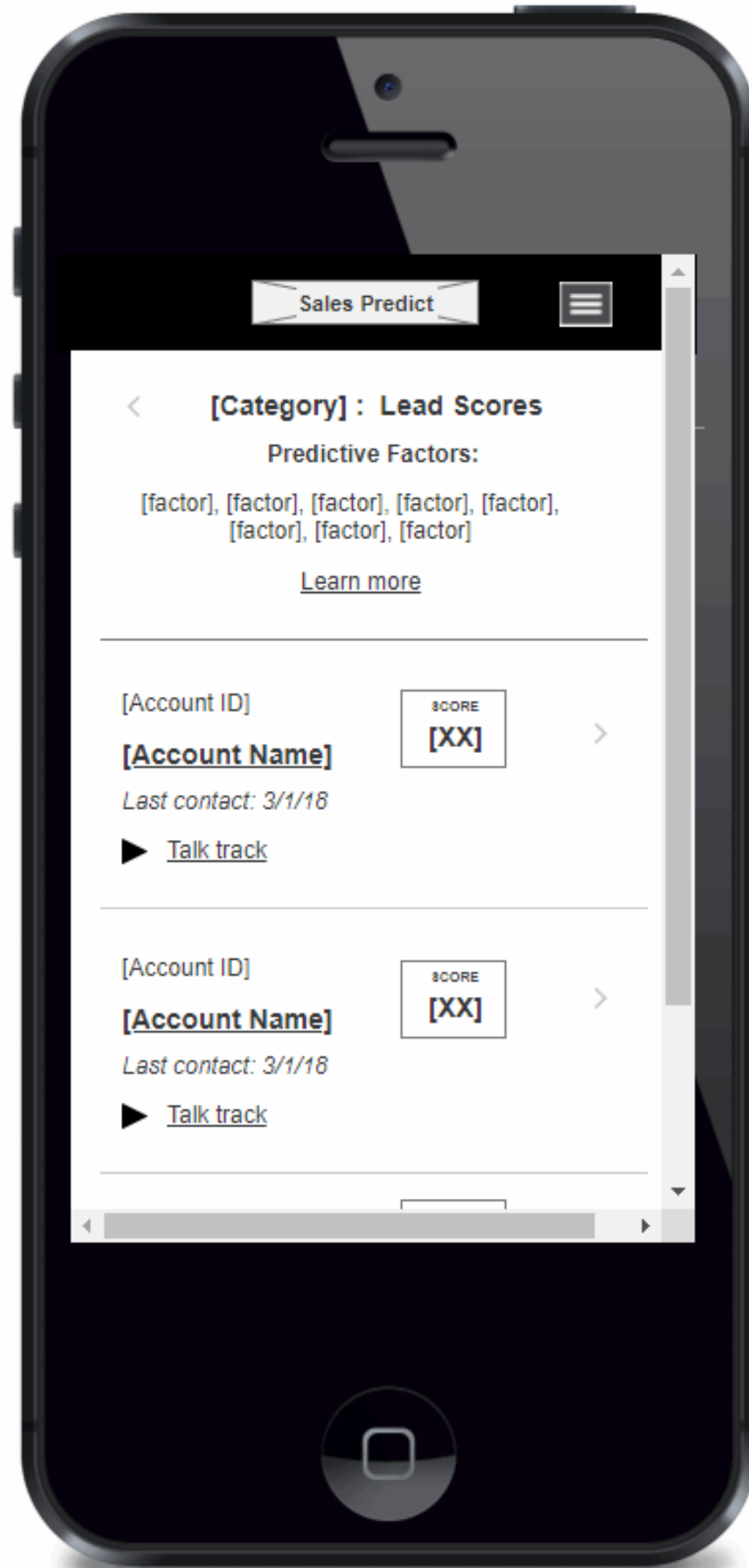
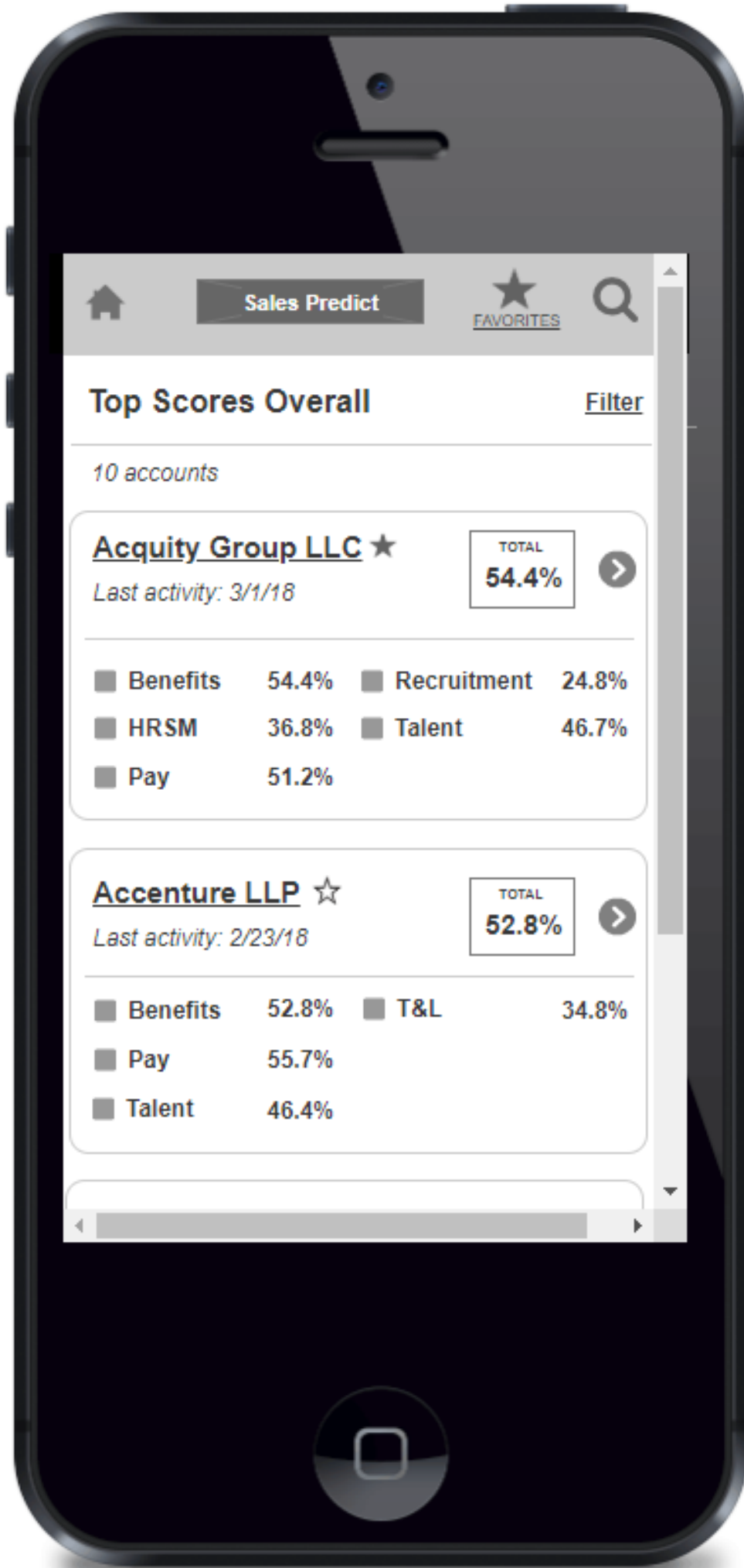
A more human resource.™



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.

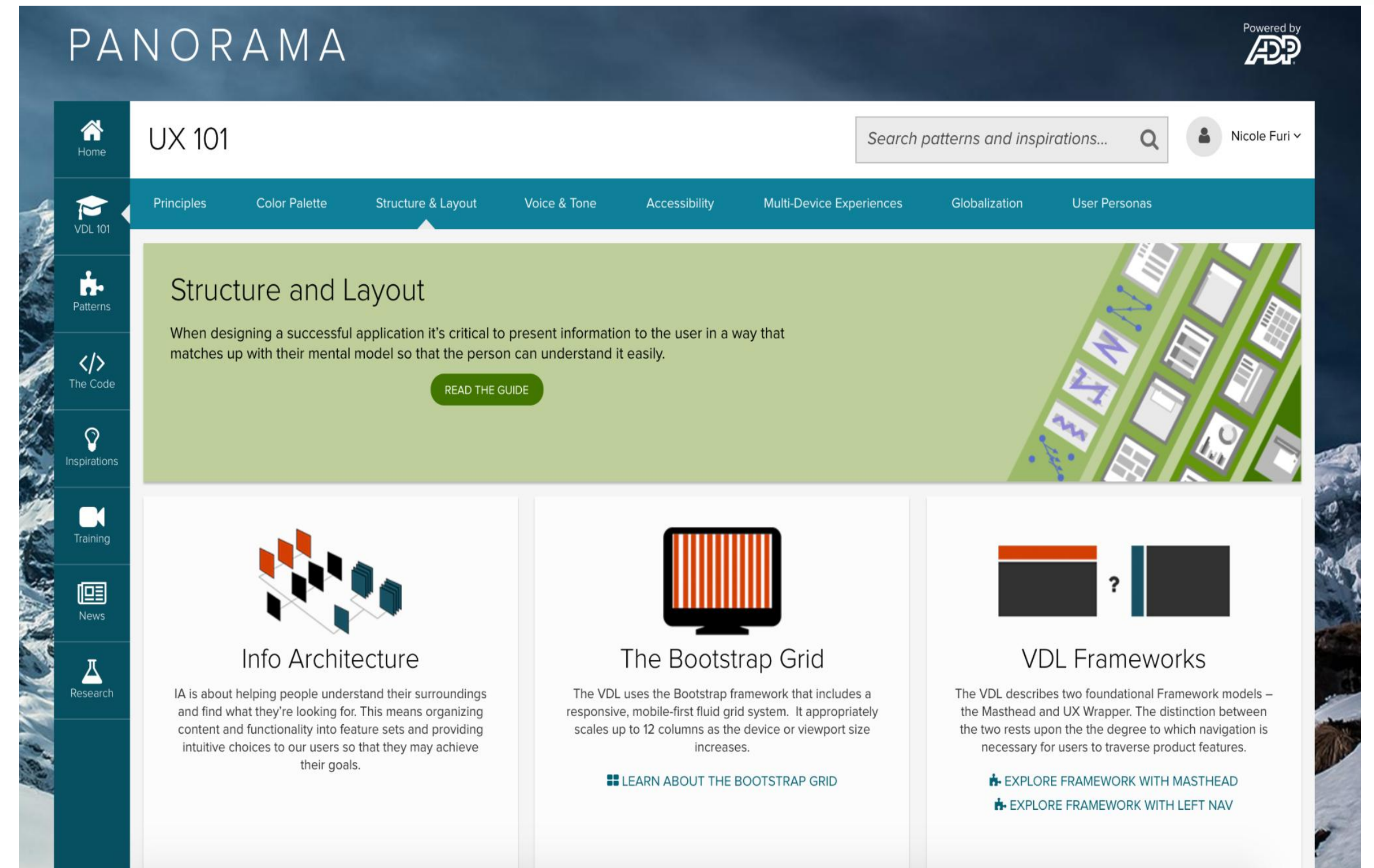
There were necessarily several rounds of iteration and feedback collection on wireframes. Working with the the sales team, I determined which were the most relevant categories to rank prospects on, and on what numerical scale. We went back and forth on how much information should be shown for each up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



Best Practices

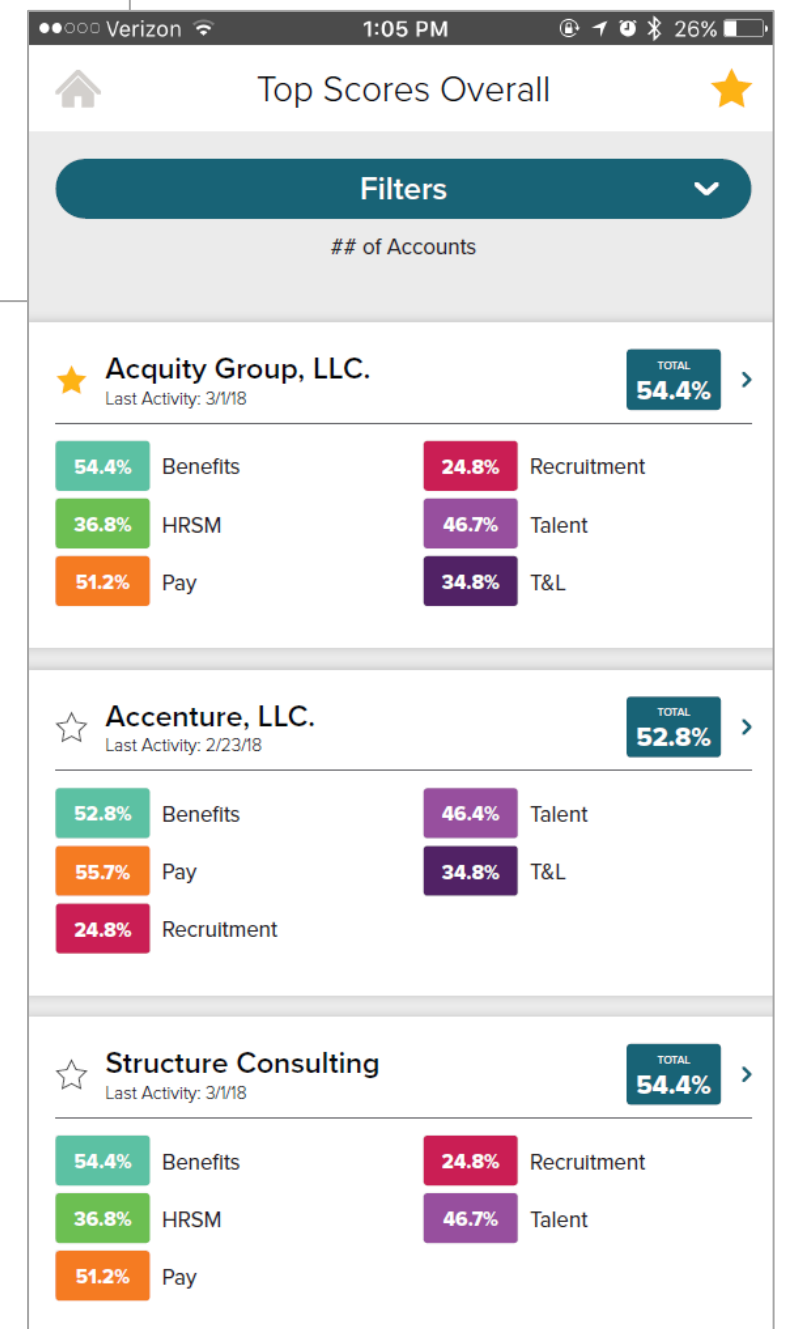
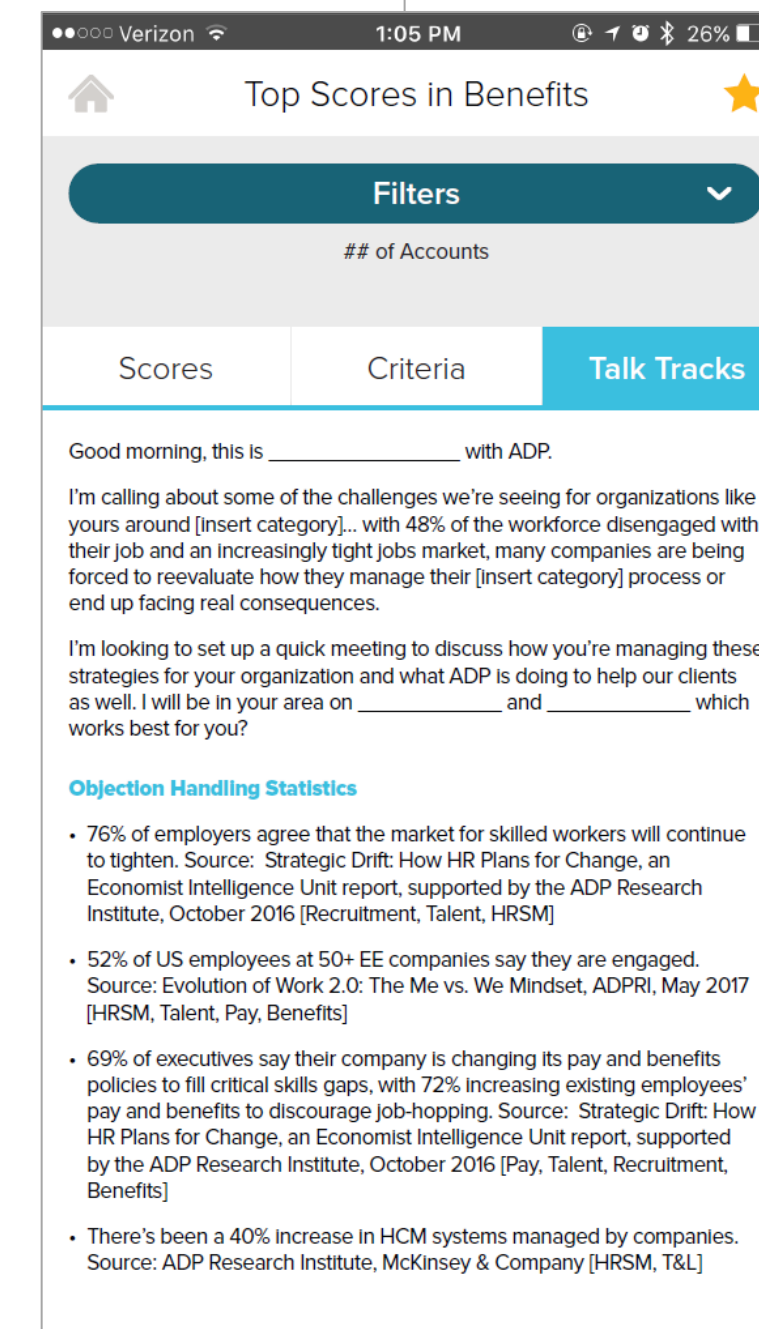
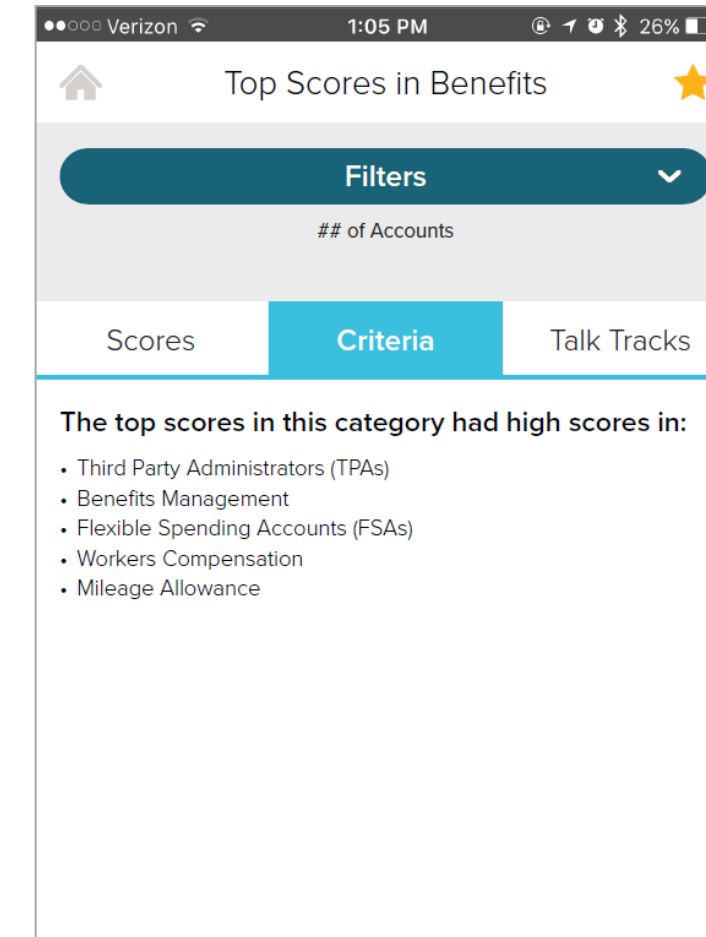
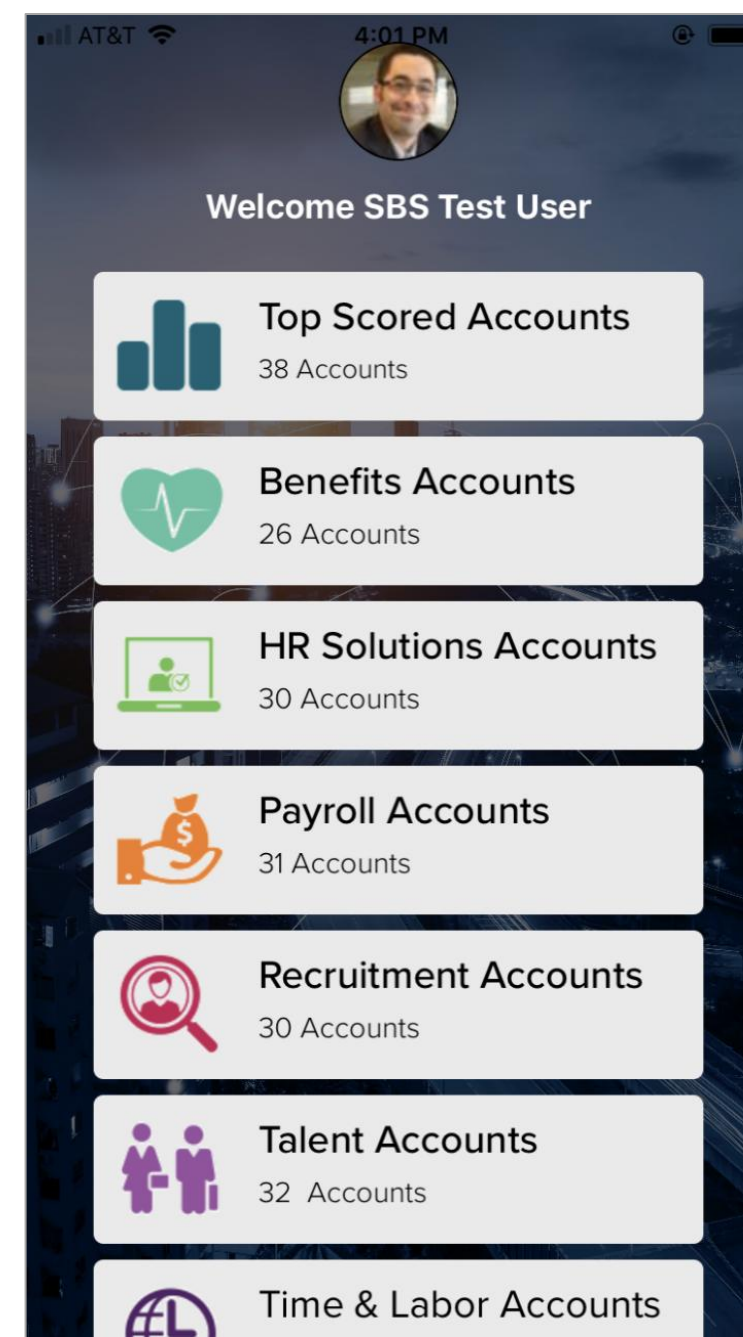
✔ Do	✘ Don't	✔ Do	✘ Don't
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Field Label</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Placeholder text...</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Placeholder text...</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Field Label</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">\$ Input text euro</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Field Label</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Search...</div>
Include a field label	Remove the field label	Use external text to indicate currency units	Use a search bar without an icon

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.



Launchpad by ADP

Competitive Intelligence

ACTIVITY | COMPETITORS

Showing 8 of 23 competitors in the database matching [search item].

- PAYCHEX
- paycom
- CERIDIAN
- Paycor
- paylocity
- workday.
- Ultima SOFTWARE

Competitive Intelligence

Showing 8 of 23 competitors in the database matching [search item].

- PAYCHEX
- paycom
- CERIDIAN
- Paycor

ProductivityDash | Grey Reno | Senior District Manager

Sales Summary | Full Year Quota: \$330k

- 7.1% WTD (\$8,000)
- 94.4% MTD (\$25,225)
- 125.5% YTD (\$225,000)

ASP = \$340.3k

Unit Summary | a Unit: 1

- 67.6% WTD (2)
- 8 MTD (8)
- 114.6% YTD (80)

AUP = 100

YTD	QTD	MTD	WTD	
Units	Group	Current Year	Prior Year	Trend
Discount	Associate DIV Average	24.0% 23.2%	25.0% 22.8%	●
CAV	Associate DIV Average	\$2,200 \$2,178	\$2,245 \$2,260	●
HR Bundle	Associate DIV Average	20.3% 20.8%	23.2% 22.3%	●
EES	Associate DIV Average	4.6 5.1	5.2 5.5	●

ADP CI

John's Account | Sign Out

Favorites

- Events
- Shares
- Flags
- Videos
- Success Stories
- Learning

Settings & Preferences

- News Feed Preferences
- Account Settings
- Activity Log
- Help Center

StartAssist

All Orders: 26

- 2nd Check-in Completed: 3
- Sales Incomplete: 4
- Setup on Hold: 5
- QC Assigned: 10
- Setup Reviewed: 4
- 1st Input Scheduled: 0

Test BC scheduler 1

Opportunity: Test BC scheduler 1 | Account: Test MA acct - JR | Alfreds Futterkiste | Received Date: 2018-05-02 | Company Code: ADP123

processing Center: | Product Code: | Deal Status: | Branch Code: | QC Extension: | DM Name: Jessica Rodriguez | Bundle: | IS Specialist: | Scheduled 1st Input: | SBS General Activity: 2nd Check-in Completed

IIID: 3123443

> Test AVS

> Test AVS

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.