



UX Research Portfolio Review

A brief overview of my UX research projects and case studies.



PACIFIC LIFE

Life Insurance / Wealth Management

Research Objective:

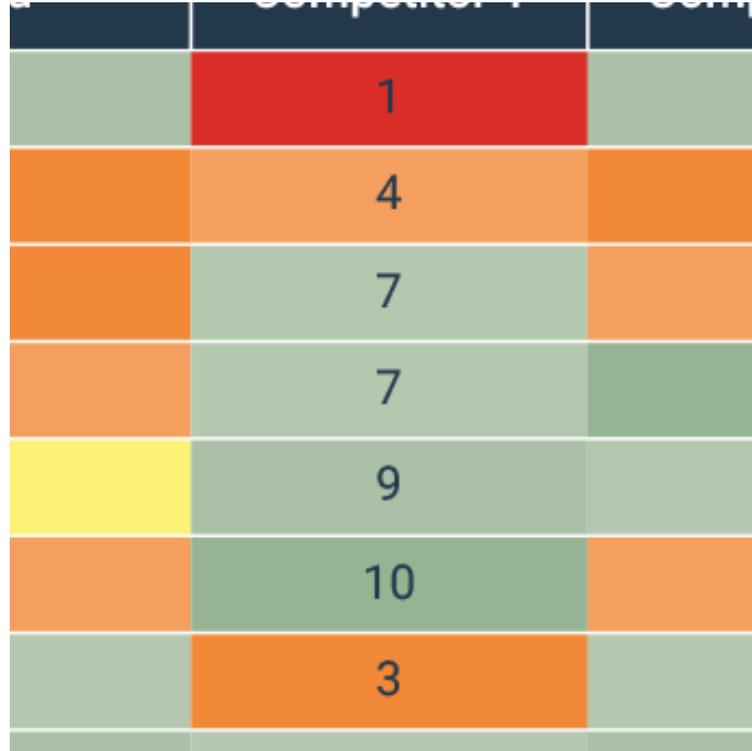
How might we better understand what customers (Financial Professionals, Holistic Planners) want in life insurance products.

Pacific Life Research



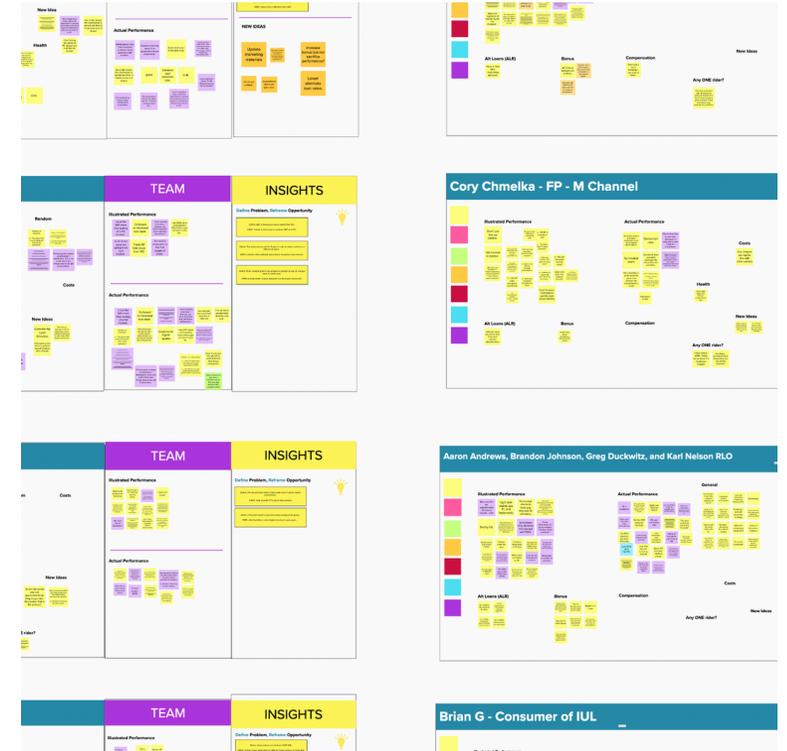
User interviews

40 user interviews, were conducted with Financial Professionals to understand pain points and needs in life insurance product offerings.



Competitive analysis

Compared Pacific Life with the top 10 competitors to analyze features and customer experience in making selections.



Design Thinking

Developed 80+ synthesis sessions for each interview based on research findings and stakeholder feedback.

Pacific Life Research



S&P options

1-yr S&P (Benchmark Indexed Account) | 2-yr S&P | 3-yr S&P | 5-yr S&P | 1-yr S&P High Cap w/ Charge | 1-yr No Cap

VCI Options
Volatility Control Index (VCI) is tied to BlackRock Endura

1-yr VCI w/ bonus (D0-45bps) | 1-yr VCI w/ higher par rate (without bonus) | 2-yr VCI w/ bonus (50bps to 1% each year) | 3-yr VCI w/ bonus (75bps to 1.25% each year) | 5-yr VCI w/ bonus (1% to 1.5% each year)

Here are some new concepts

Policy holder can lock in index return at anytime within the policy segment. | Policy holder can invest in index account with blended index instead of 2 different index accounts. (e.g. Endura and S&P) | Policy holder can invest in bundle index account with pre-determined allocation. (e.g. 50% in 1-yr S&P / 50% in Endura) as a return they can get a higher cap on 1-yr S&P. | Design your own indexed account

Performance Factors
Pick one option from each row.

Do you want the flexibility to choose which index accounts get performance factors (multiplier)?

Yes: Choose which indexed accounts get performance factors. | No: All indexed accounts would get performance factors.

Choose your multiplier from the following options:

Same multiplier for all indexed accounts. | Multiplier varies by index (e.g. all S&P 500-based index accounts would have the same multiplier). | Multiplier varies by indexed account.

Choose from the following charge options:

0% | 2.5% | 5% | 7.5% | 10%+

Cash Surrender Value Enhancements:
Pick the options you want to include.

Coverage charge duration is longer while the cash surrender value enhancement feature is selected (e.g. CC is 5-10 years for base product, and 15-20 years with EVE). | Heaped commission on early cash value (Balance on the charge back structure). | Cash value enhancement: Duration 10. Guarantee to return 85% of accumulated premium (p). | Cash value enhancement (between the cash value surrender charge). | Deferred premium load options (offer load X years).

No Lapse Guarantee (NLG):
Pick one option.

Flexible duration NLG (with charges) up to age 60. | Free short-term NLG (Up to attained age when the policy distribution starts. (e.g. age 65)). | No NLG charge up to attained age 65 and start charge age 65+.

Loans and Distributions:
Pick two options.

Standard loan. | Alternate loan (variable interest rate on loan charge and loan credit). | Fixed loan interest rate charge (1.5%) for alternate loan. (Restricted to VCI accounts). | Interest-free short-term loan from available cash value.

Living Benefits: PART 1
Choose from the following options.

What do you normally prefer when it comes to living benefit riders?

Long-Term Care. | Chronic Illness. | Critical Illness.

Living Benefits: PART 2
Choose from the following options.

Please choose the following LTC design options: Pick 1 to 2 options.

LTC protection with no charge, accelerating death benefit. | LTC protection with a charge, accelerating death benefit. | LTC protection with a charge, with a separate benefit pool. | Solves for LTC with a separate solution.

Scenarios based on Age 60 and Age 80:

New or Missing?
Add two new options (if any).

Better underwriting/ experience/ access cash value.



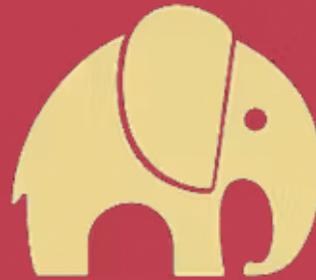
Live Prototype Building Session

Created live prototype session for 10 Financial Professional Customers.

Each prototype contributed to the final LIRP product.

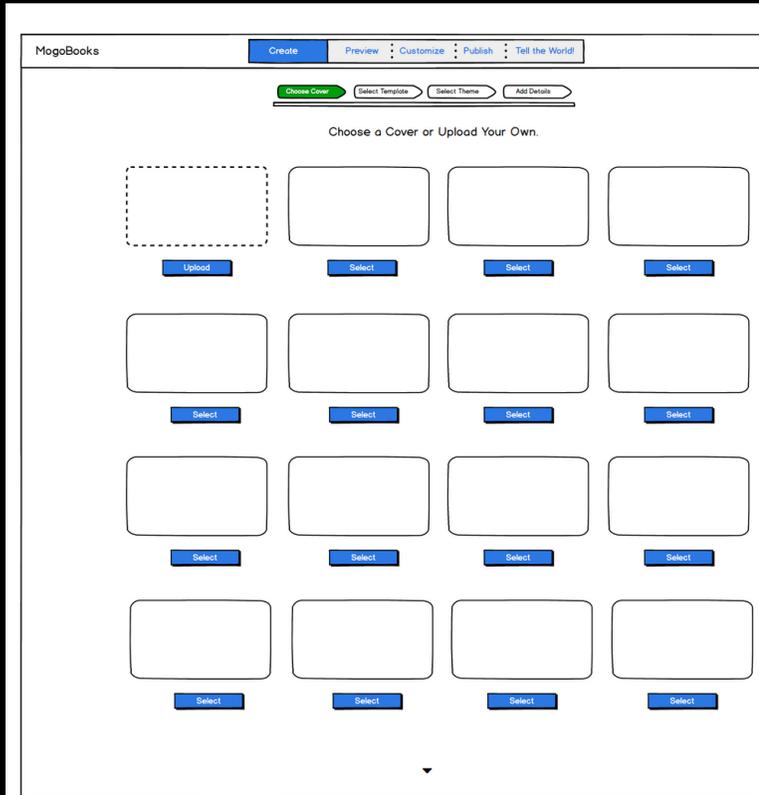
E-Learning SaaS

Understand what customers (Teachers and Facilitators) want in an online workbook platform. How might we build a product that improves the user experience interacting with workbooks.



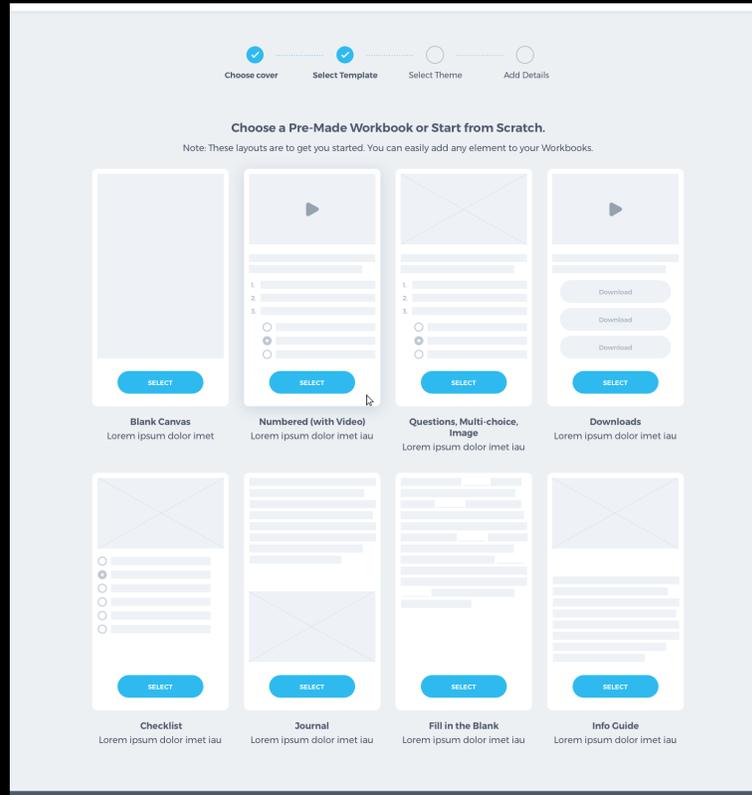
Workbookable

Workbookable



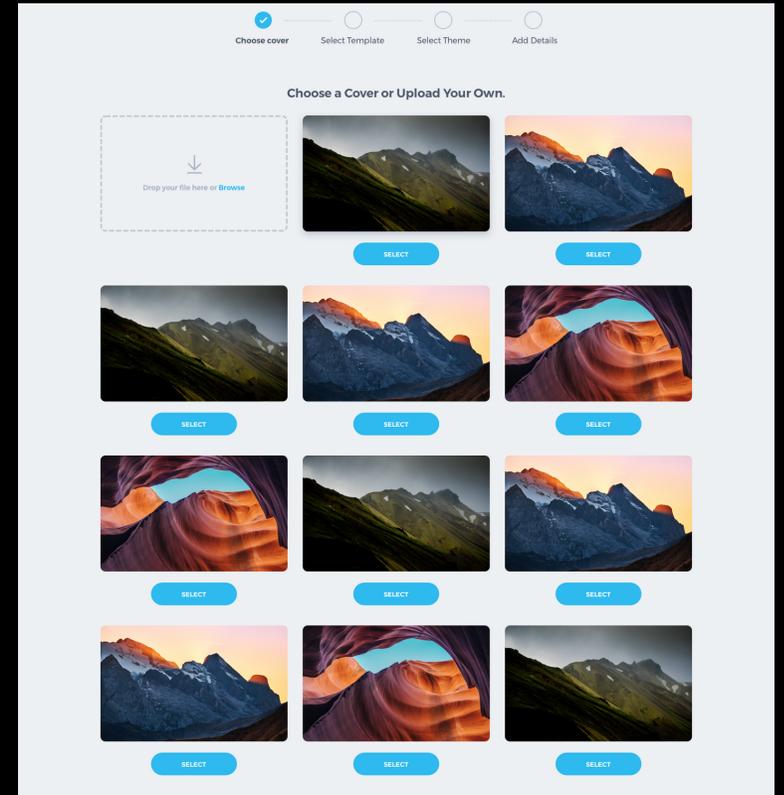
Wireframe #1

Early wireframe showing proposed layout for an easy to navigate onboarding experience.



Design

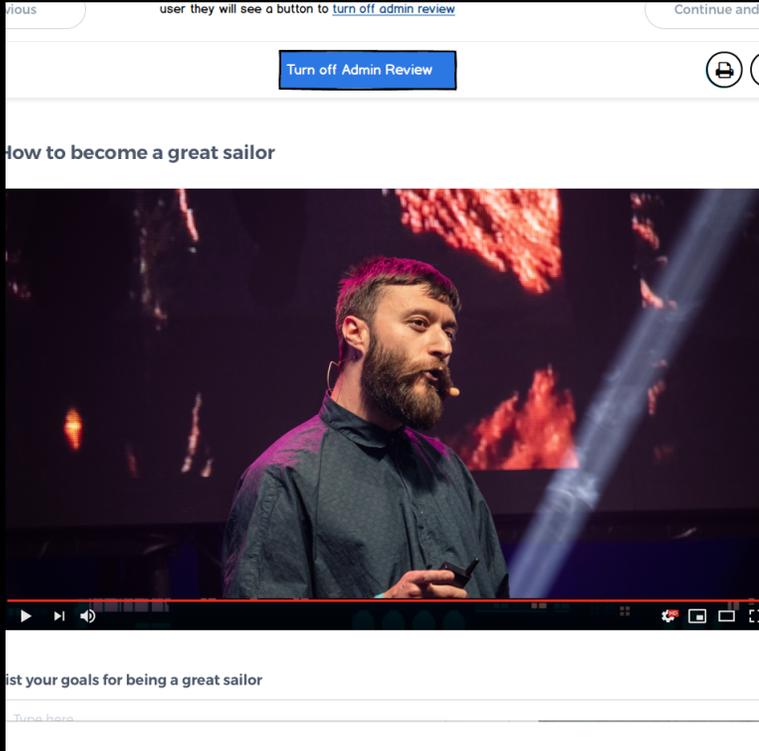
An idea to pre-populate components based on the type of Workbook.



Final Design

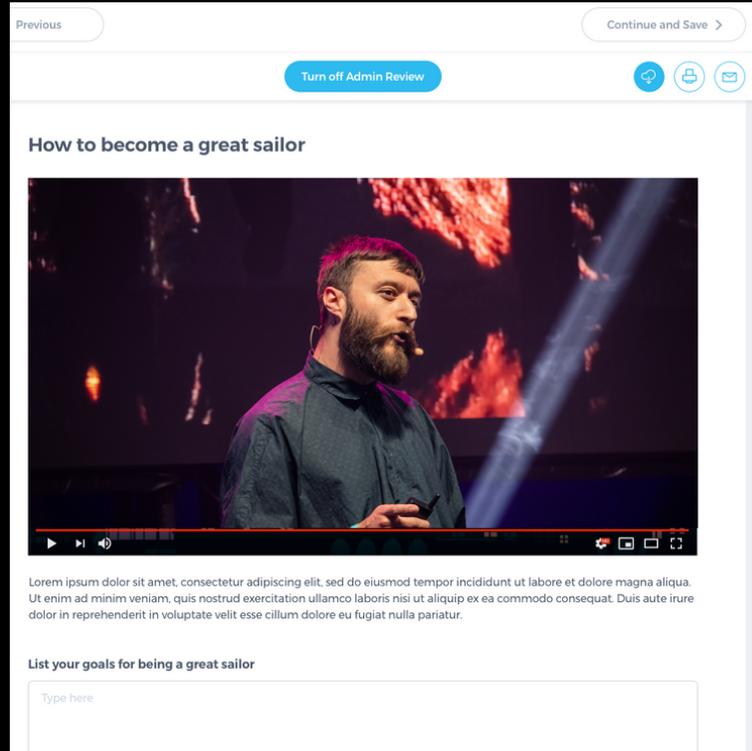
Final design showing branding, imagery, and optimized responsive layout based on approved wireframes.

Workbookable



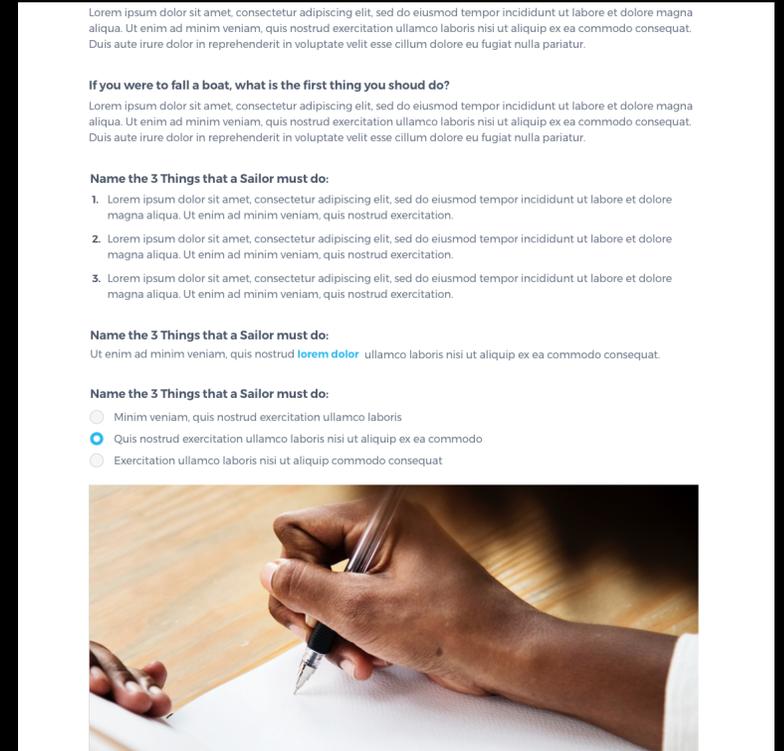
Wireframe

A modified version of the reader design. We wanted to make it easy for teachers to review students' answers and ensure security permissions were granted.



Design

Hi-Fi design provides flexibility to turn on or off granted-access to teachers to see their answers.



Outcome

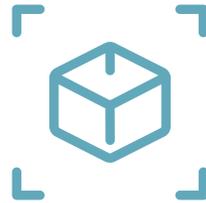
Reader design was optimized to show answers to teachers that were granted view-access.

Key Takeaways



Uncovered key user pain points

Identified the top **3 pain points** users face during onboarding flow through user interviews



Invalidated initial assumptions

Conducted usability testing on low-fidelity prototypes which invalidated two assumptions.



Informed design decisions

Findings from field studies and A/B tests directly informed major design changes in V2 for easier way to see students' answers.

Research pointed to a need for pivot and re-focus on improving UX accessing students' answers. This provided critical insights that shaped the UX and directly informed design decisions for the new product version.

Curriculum SaaS

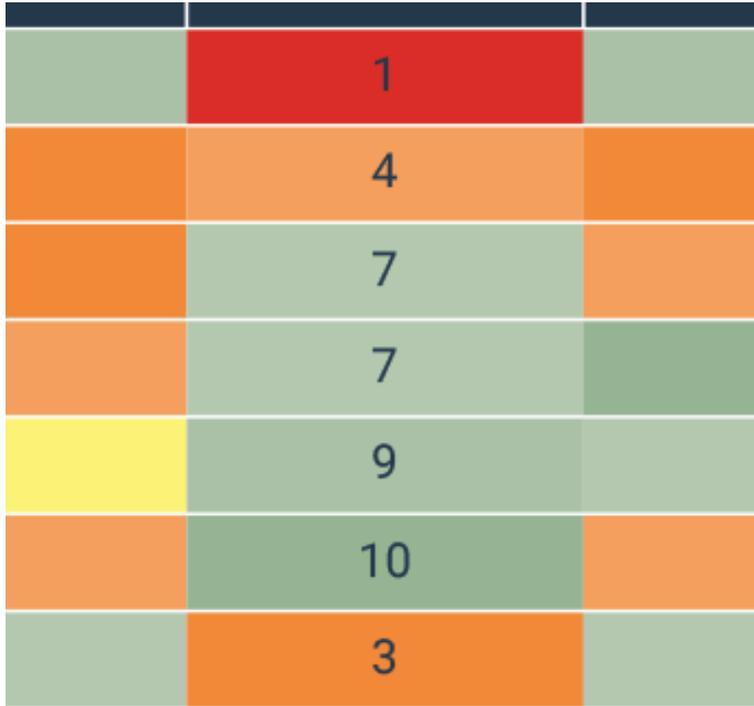
Objective: Create a platform to distribute curriculum resources easily to ministries and churches.

Project: How might we make it easy for teachers to be assigned access to the curriculum.



disciplr

Disciplr Research



Quantitative Research

Surveyed customers to better understand how to select digital curricula and assign teachers. We learned many were using email or spreadsheets to assign teachers.



Qualitative User Testing

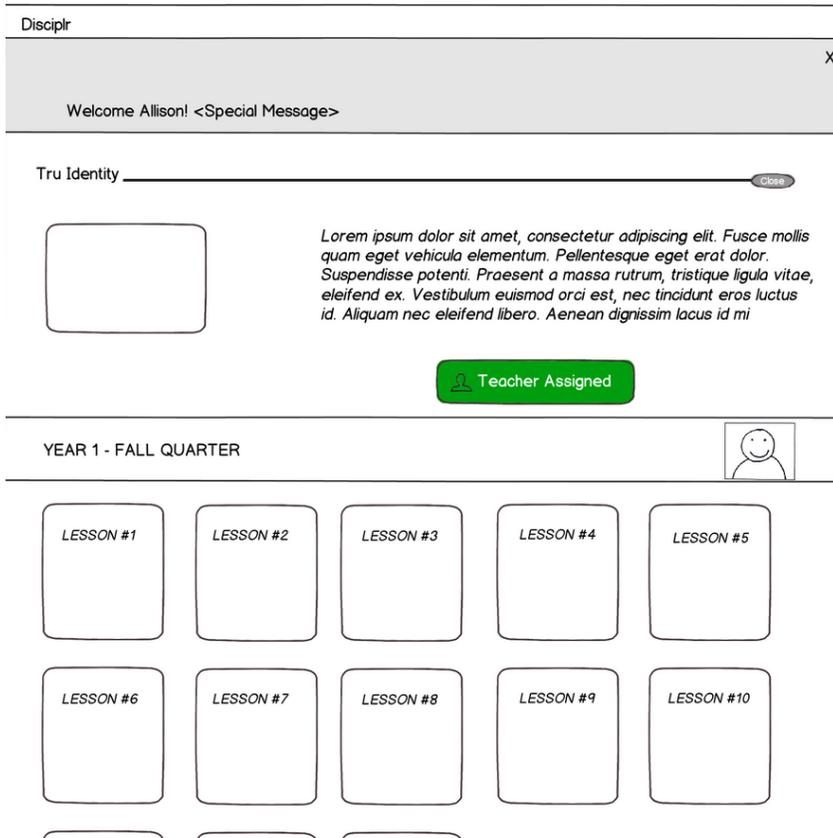
60 user interviews, were conducted with ministry directors that select, approve curricula, and assign teachers to understand pain points and opportunities.



Qualitative User interviews

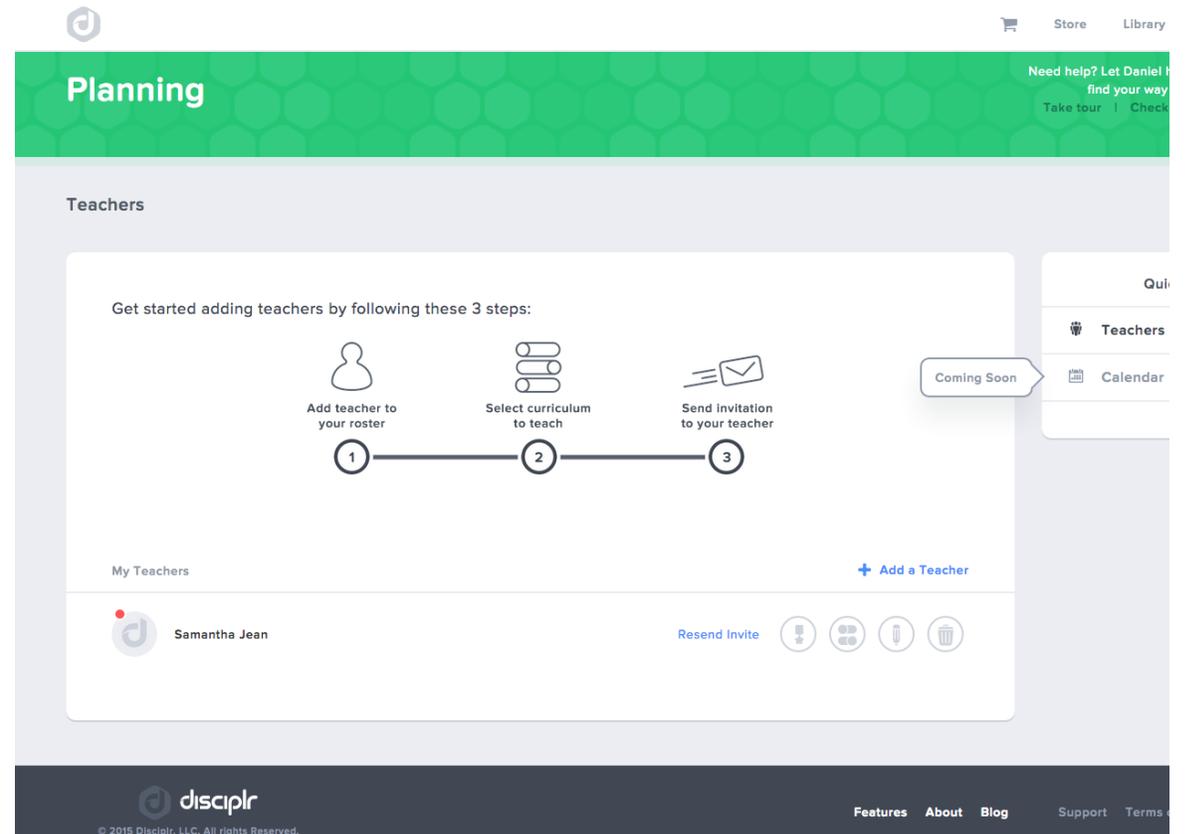
Uncovered pain points specifically around connectivity issues that re-prioritized a feature in the product roadmap for downloading curriculum resources. This UX strategy, **improved customer onboarding rates by 80%**.

Disciplr Research



Initial wireframes

Low fidelity wireframes for assigning teachers to curriculum.



Final designs

High-fidelity screen designs implementing feedback from user testing to simplify adding teachers into a designated screen.

Key Takeaways



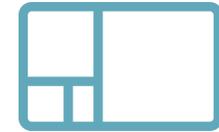
Uncovered key user pain points

Identified priority pain points users face during onboarding flow through user interviews



Validated design assumptions

Conducted usability testing on low-fidelity prototypes which validated our current direction.



Informed design decisions

Findings from field studies and A/B tests directly informed design changes on teacher onboarding and downloading resources.

Research validated the assumption that teacher assigning was difficult and connectivity issues were a barrier to new technologies.