UX Research Portfolio Review

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

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.
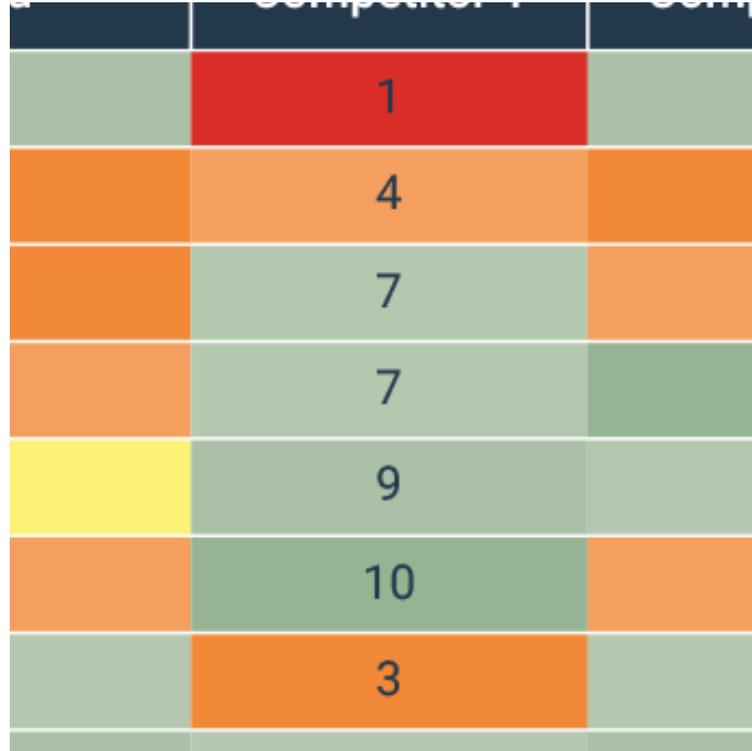
Competitive analysis

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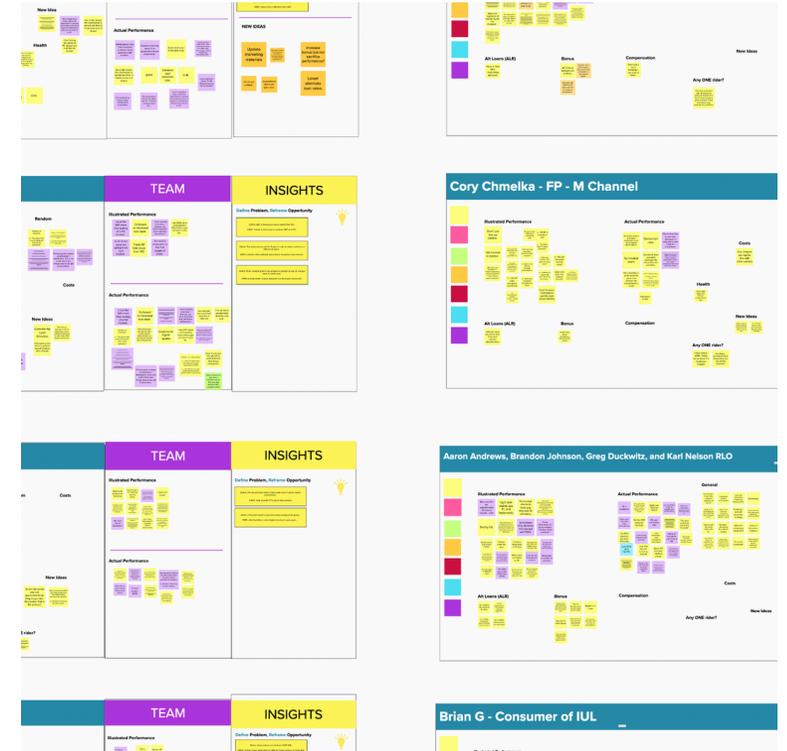
Design Thinking

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

Pacific Life Research

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.
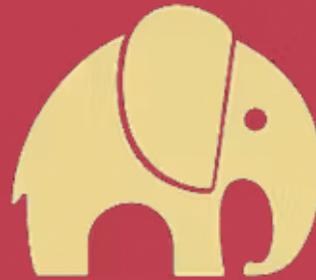
Workbookable

Workbookable
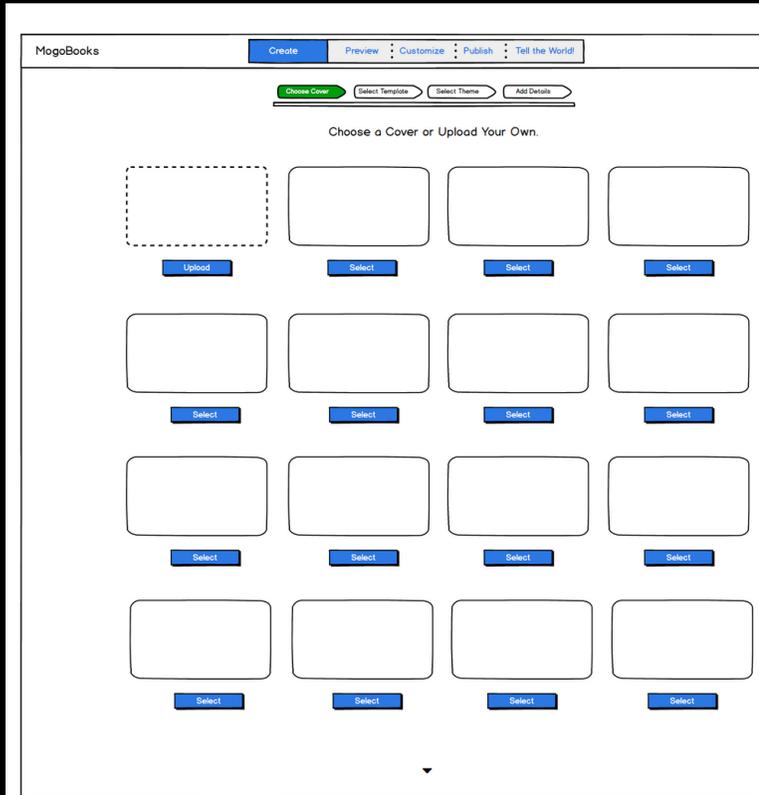
Wireframe #1

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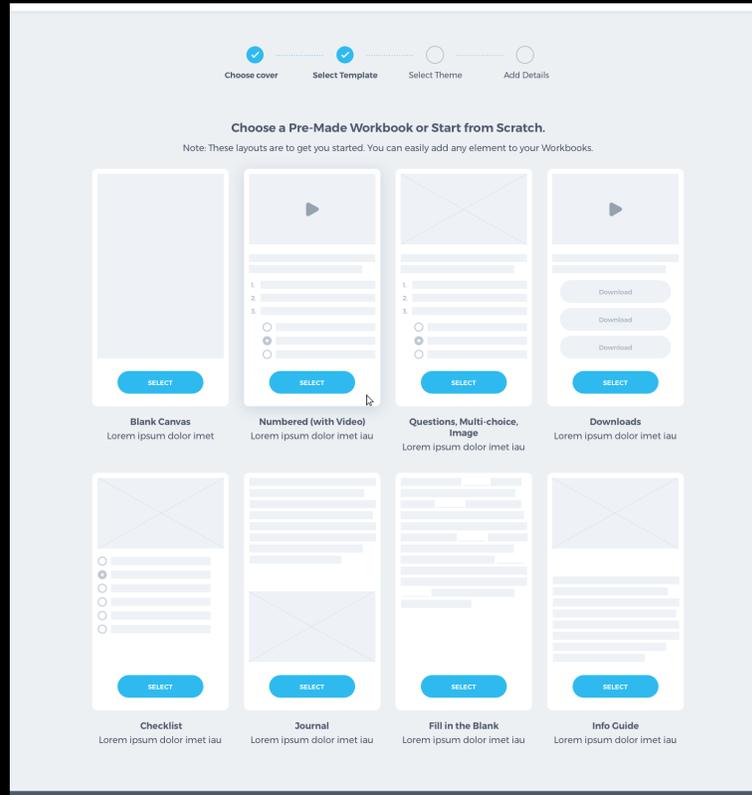
Design

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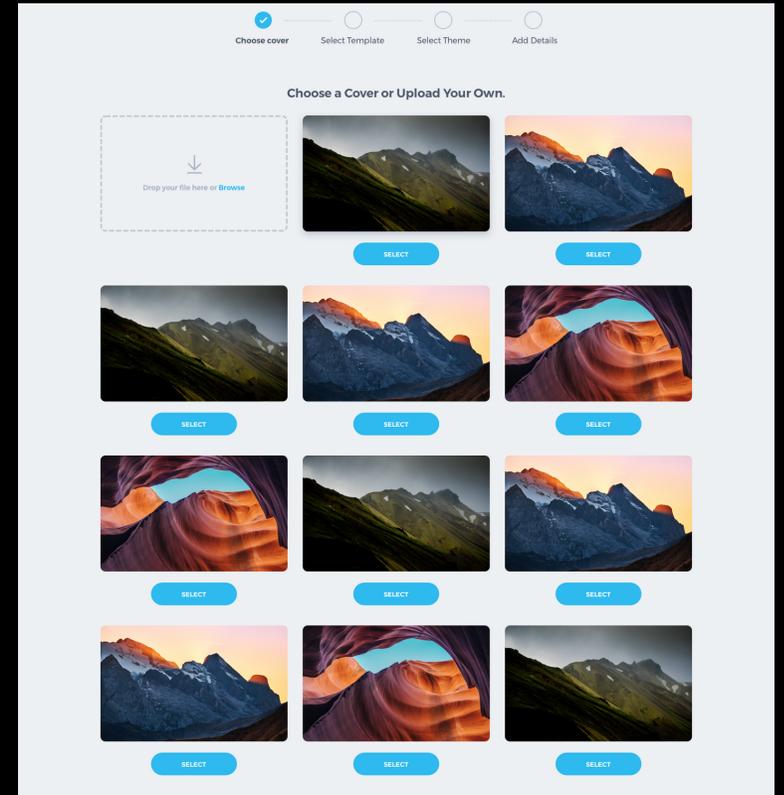
Final Design

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

Workbookable
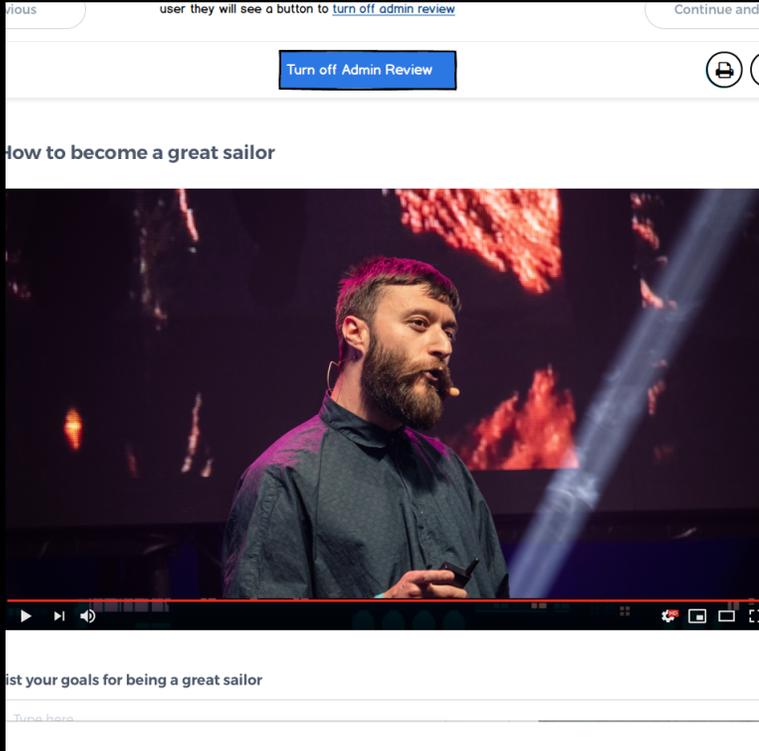
Wireframe

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.
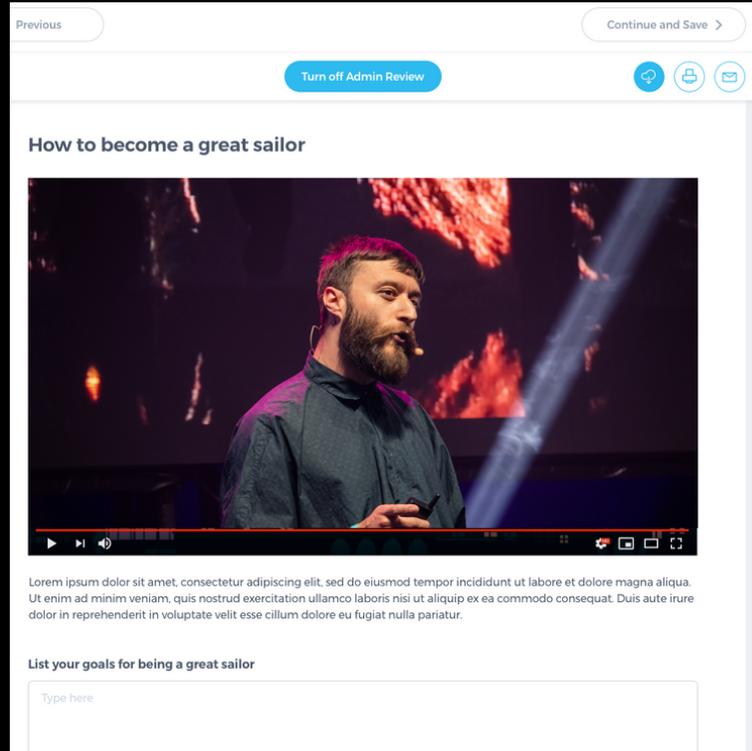
Design

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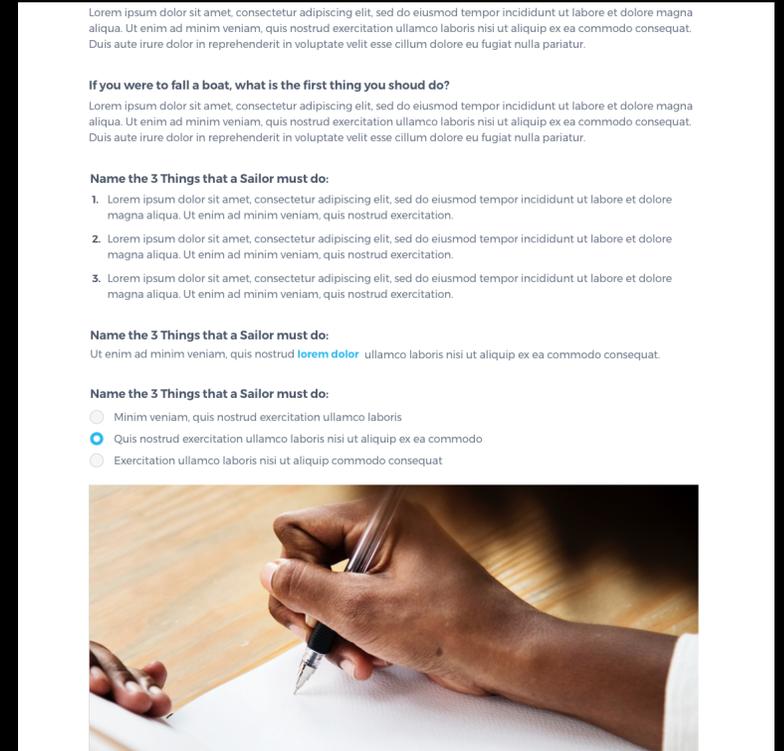
Outcome

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
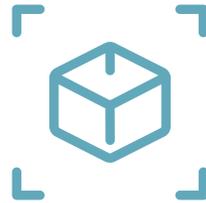
Invalidated initial assumptions

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 Research
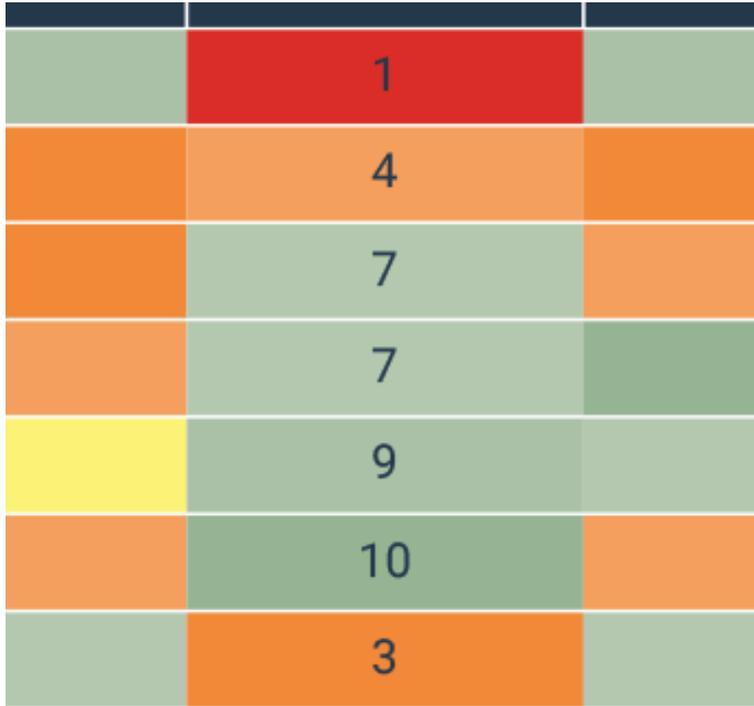
Quantitative Research

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
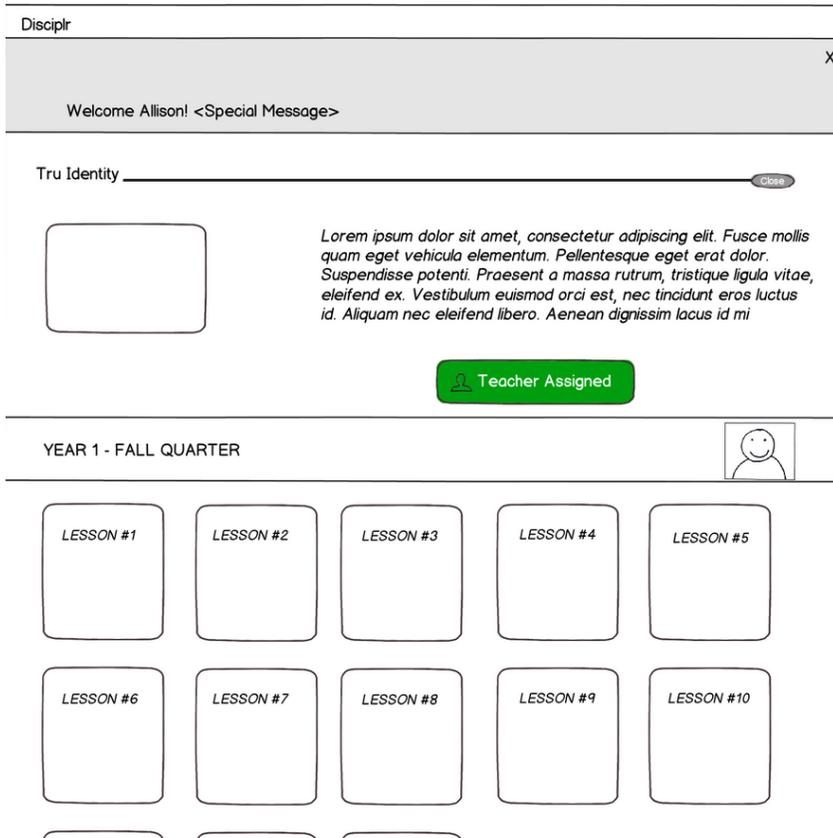
Initial wireframes

Low fidelity wireframes for assigning teachers to curriculum.
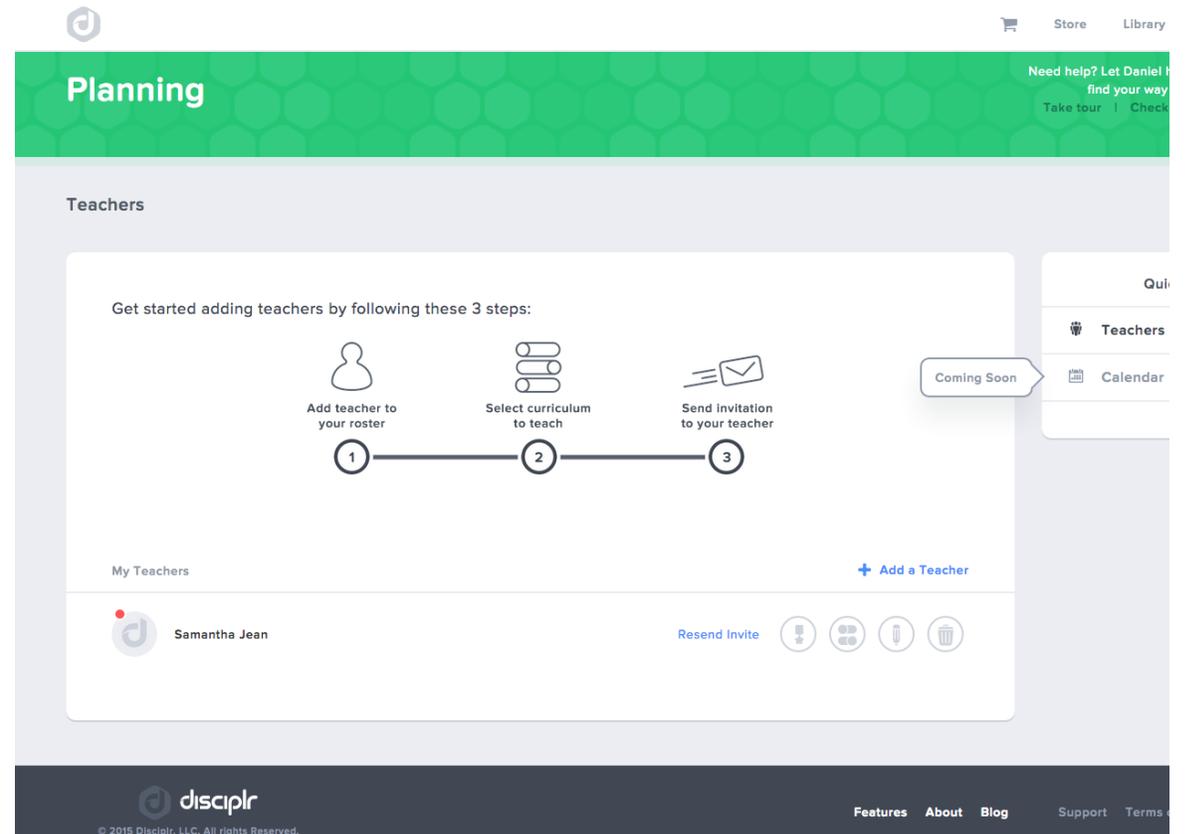


Final designs

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.
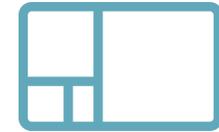
Informed design decisions

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.