

UX Design Case Studies



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# UX CASE STUDIES



Simplicity Center™



## CHALLENGE

Marketing staff in Toyota's North American headquarters were manually routing materials for marketing and legal approvals, and gathering feedback on a spreadsheet to send back to the agencies that created the materials. They wanted a way to streamline this process and take it online.

## SOLUTION

I designed a web application to facilitate and improve the efficiency of the process of routing proofs and gathering feedback.

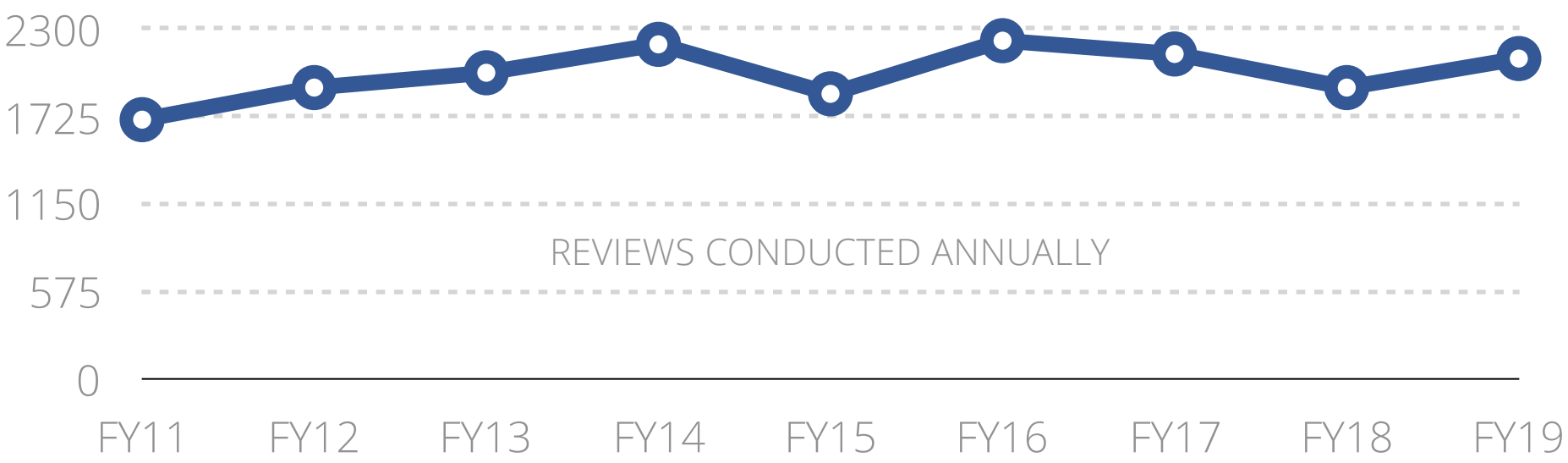
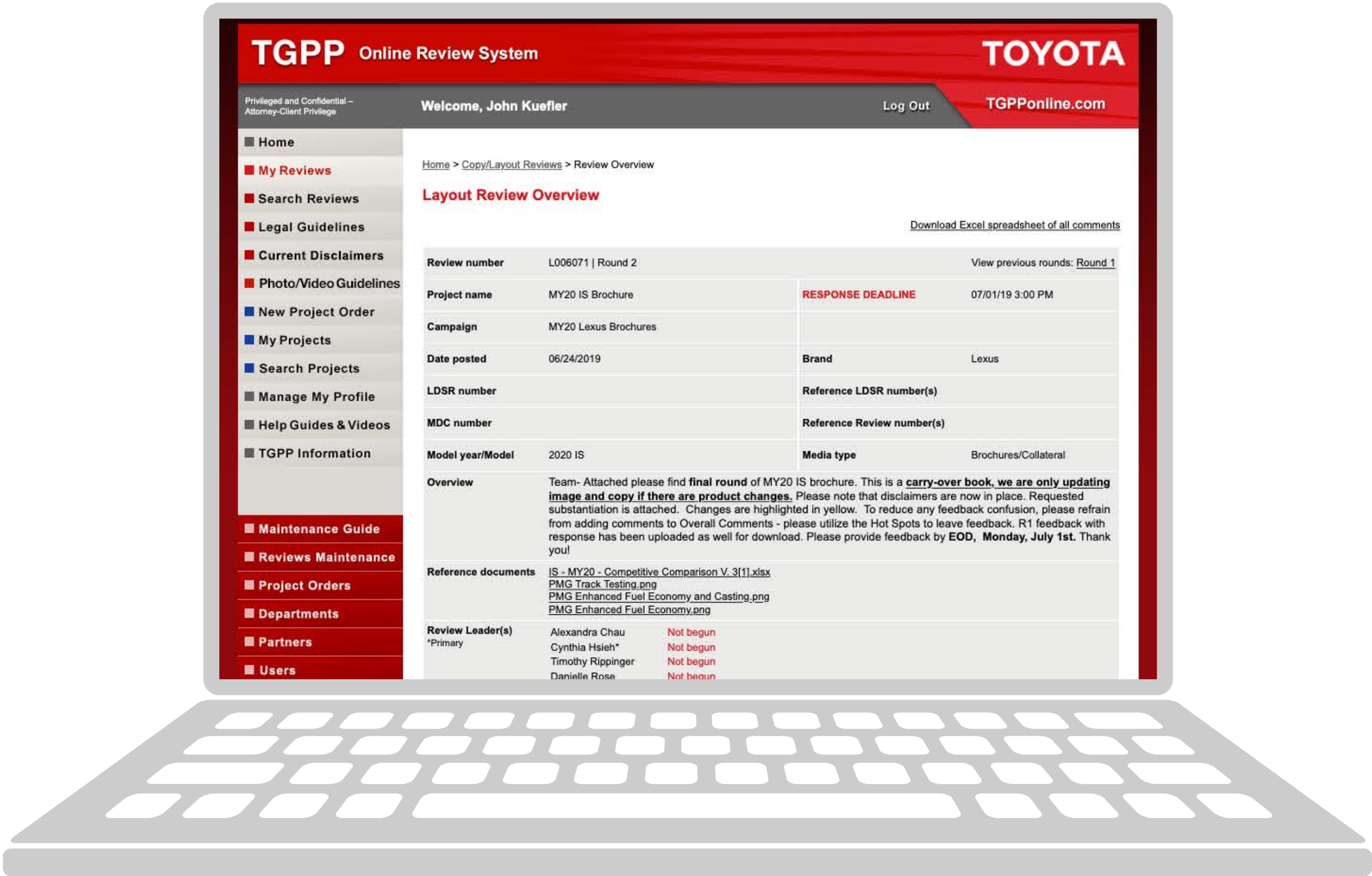
## MY ROLE

- ▶ Project lead
- ▶ Business analysis
- ▶ System architecture
- ▶ Translated business needs into development requirements
- ▶ UX/UI design
- ▶ Technical development oversight
- ▶ Documentation and user training/support



FEATURES

- ▶ The system allows for electronic routing of materials to legal and other Toyota associates, and collecting reviewers’ feedback and approvals.
- ▶ This application is the official system mandated by the Toyota legal department. All public-facing Toyota and Lexus marketing/communications materials, whether developed internally or by an agency, must be routed to the legal staff using this tool.
- ▶ About 2,000 reviews per year are sent through the system.



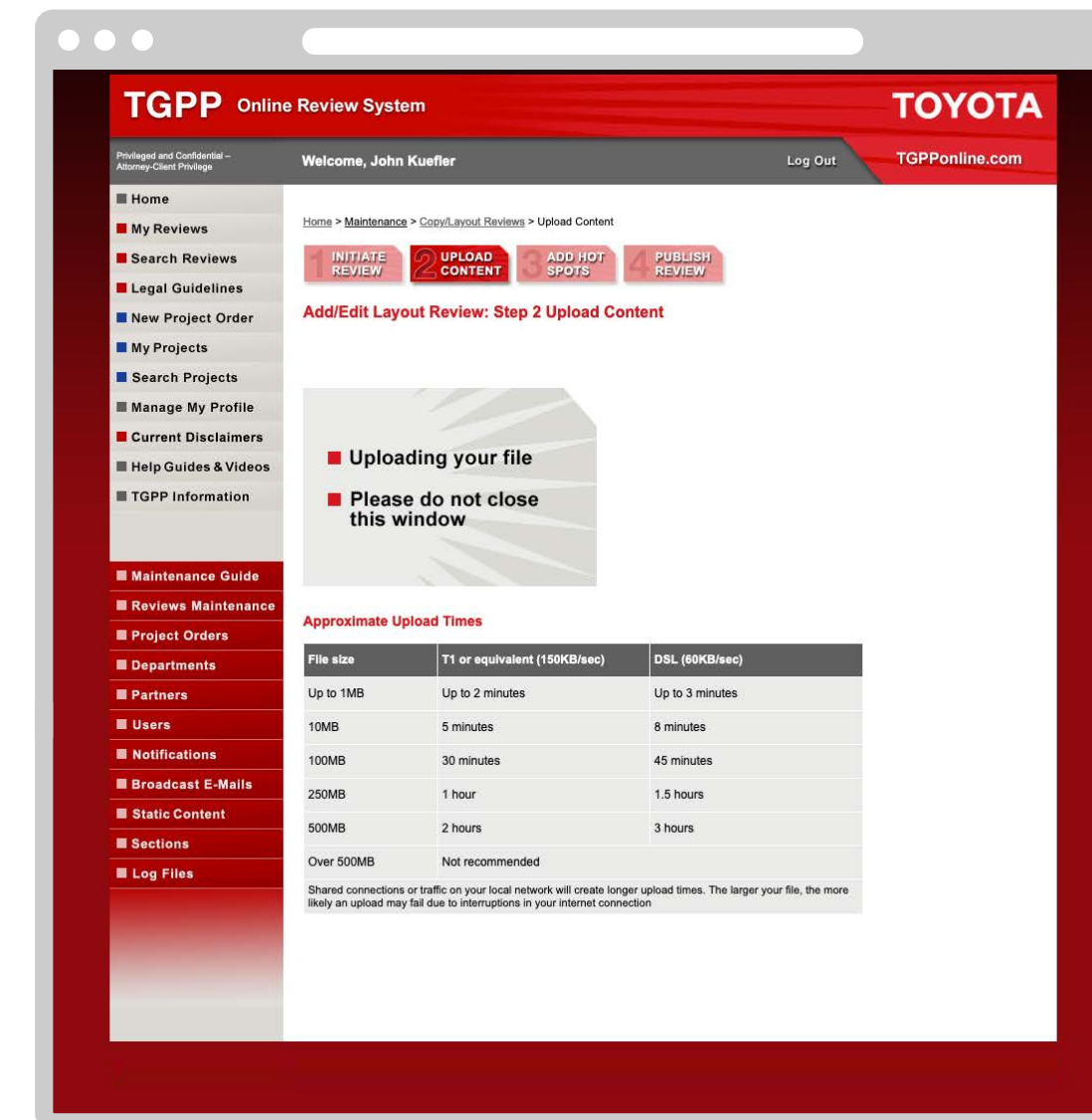




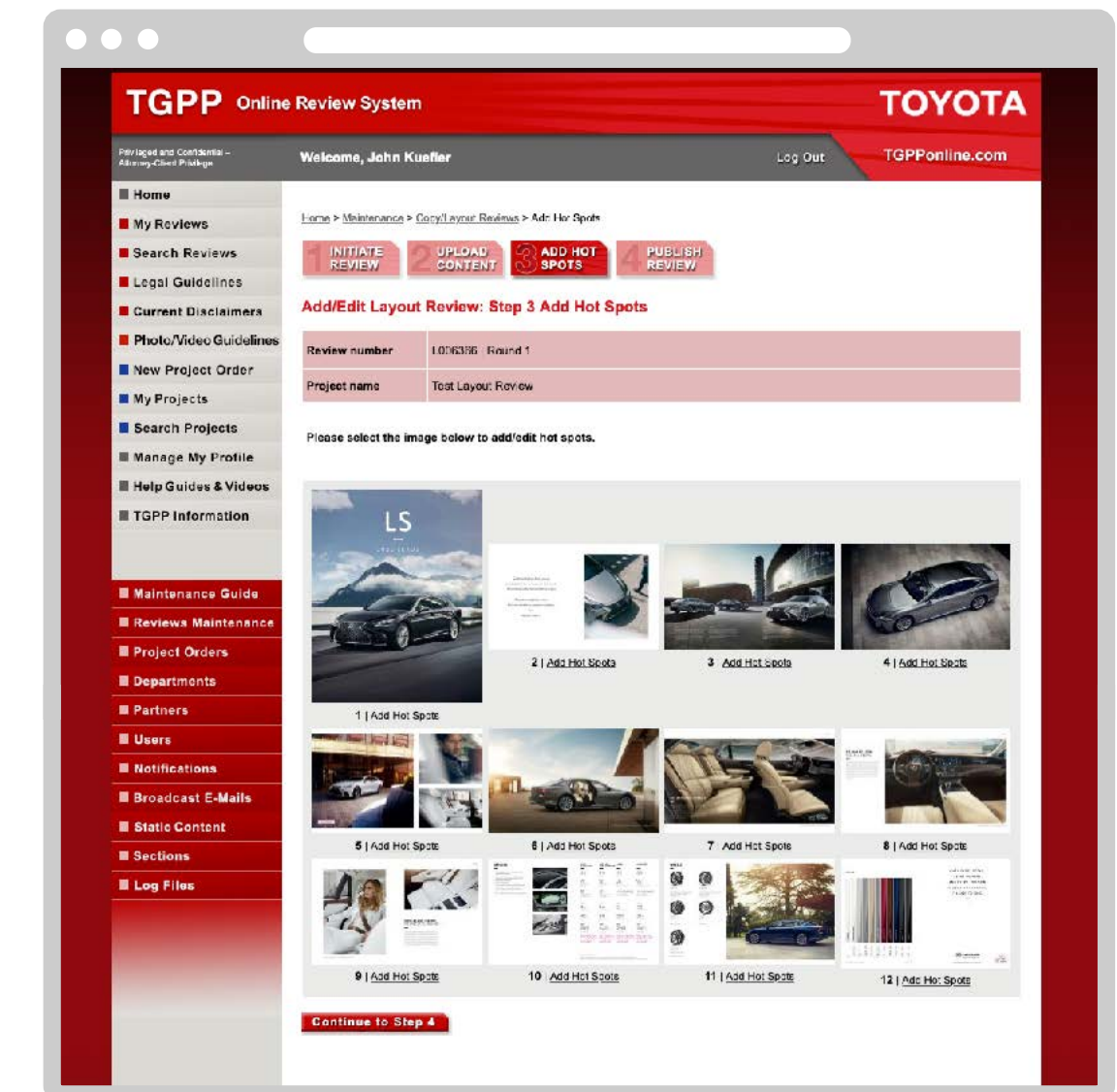
- ▶ Users who want to distribute proofs for review use a four-step wizard to describe the project, select reviewers, upload the proof, annotate it, and send notifications to participants.
- ▶ They set deadlines for feedback with optional reminders for reviewers who are not finished before the deadline.
- ▶ Reviewers click from the email notifications to the review detail, log in and leave comments and mark approved as is, approved with comments or not approved.
- ▶ When reviewers are finished, the system automatically gathers their feedback on a summary page as well as on a downloadable spreadsheet.



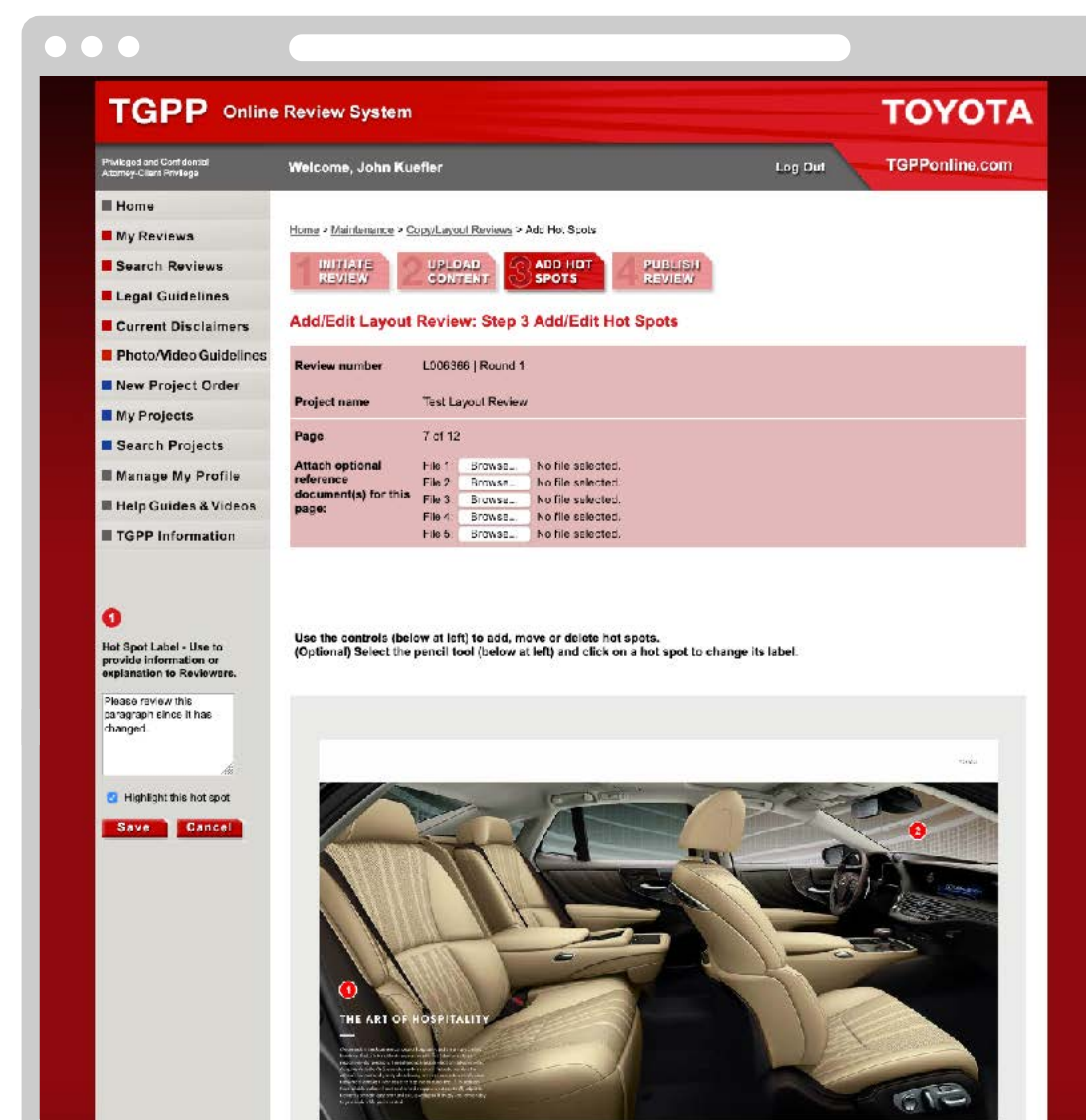
## 1 REVIEW INFO AND REVIEWER SELECTION



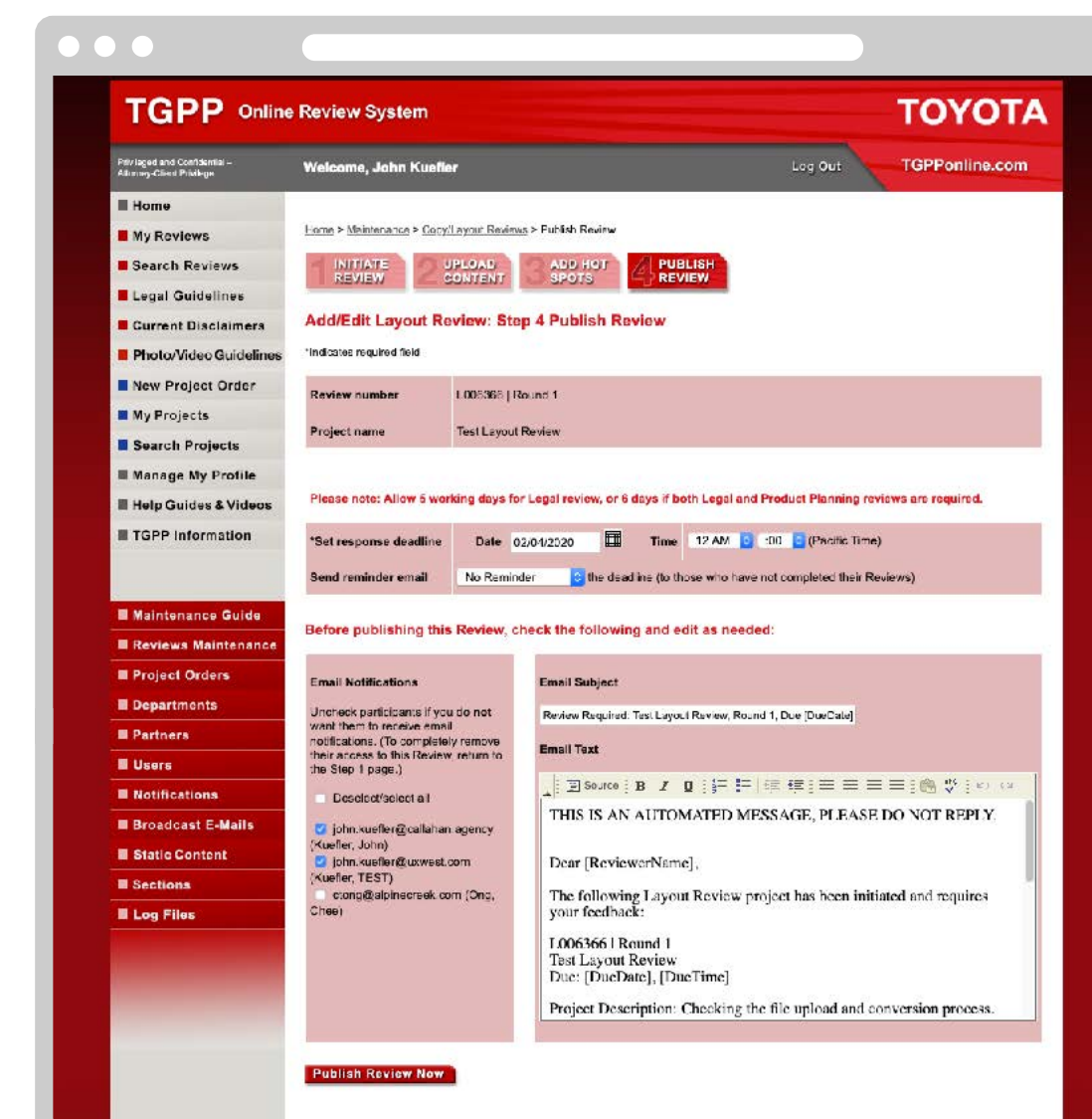
## 2 UPLOAD FILE TO BE REVIEWED



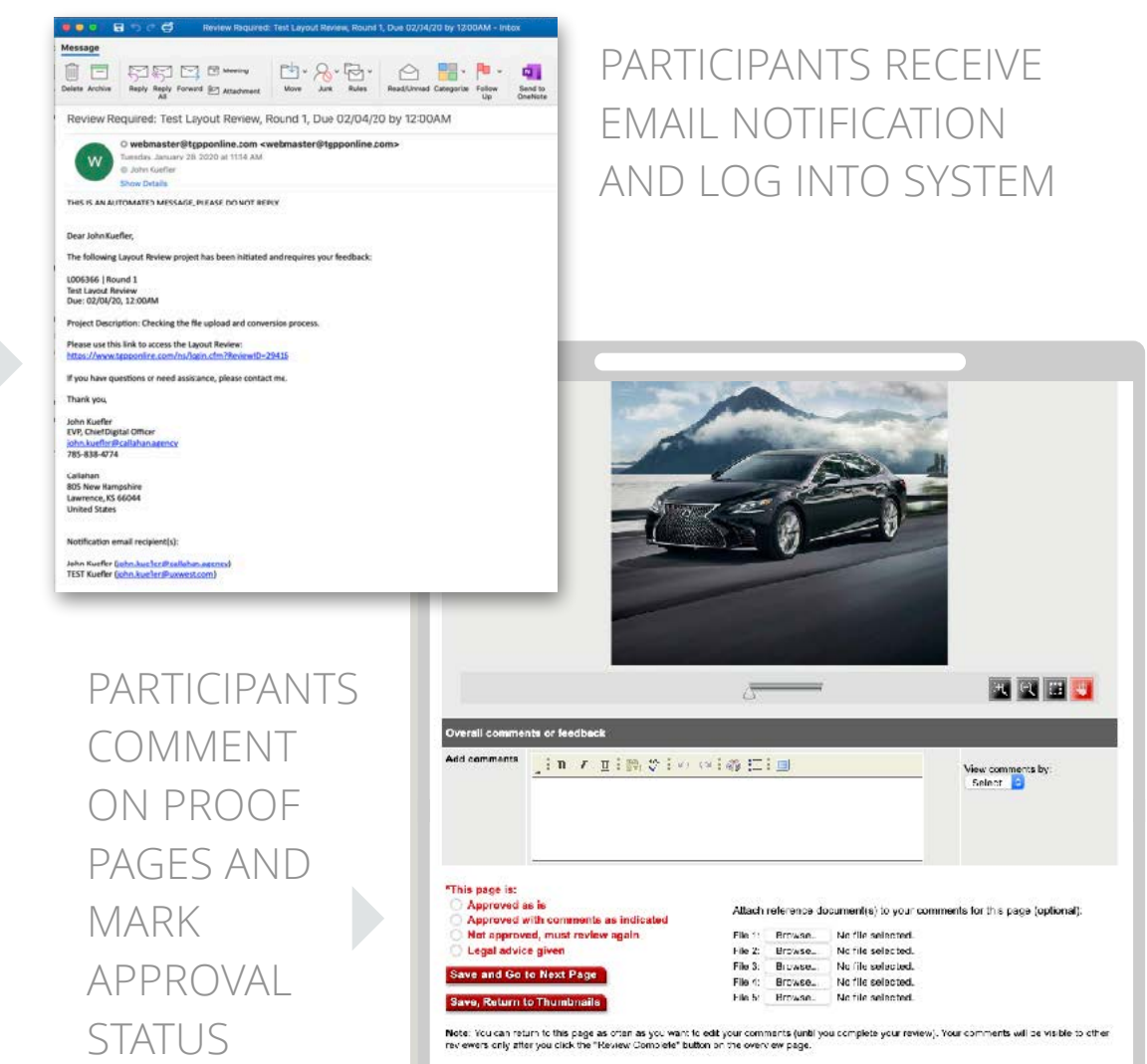
### 3A SYSTEM CONVERTS PDF TO THUMBAILS



### 3B ADD REFERENCE DOCS AND ANNOTATIONS



#### 4 SET DEADLINE AND SEND NOTIFICATIONS



PARTICIPANTS RECEIVE  
EMAIL NOTIFICATION  
AND LOG INTO SYSTEM

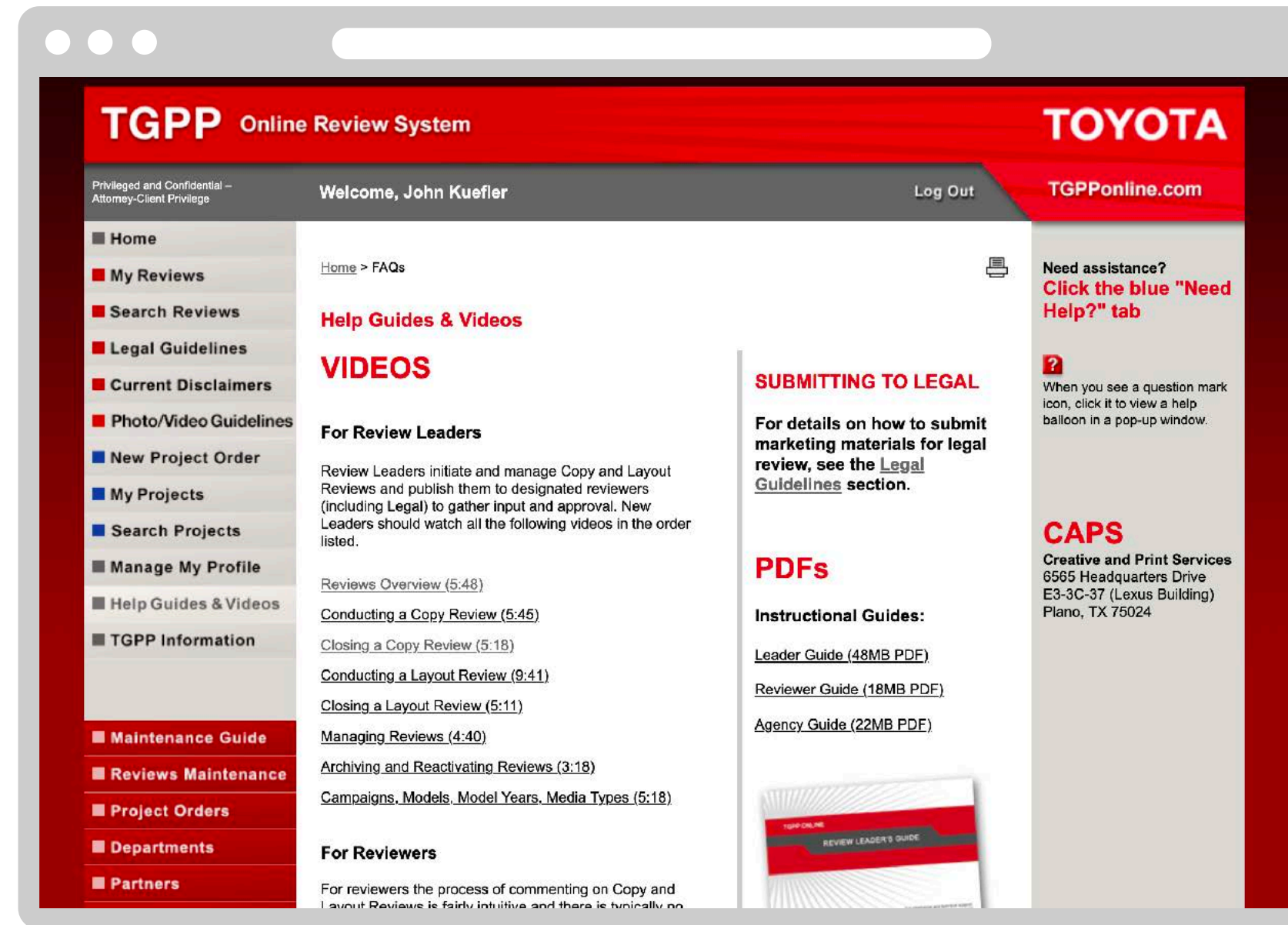
PARTICIPANTS  
COMMENT  
ON PROOF  
PAGES AND  
MARK  
APPROVAL  
STATUS



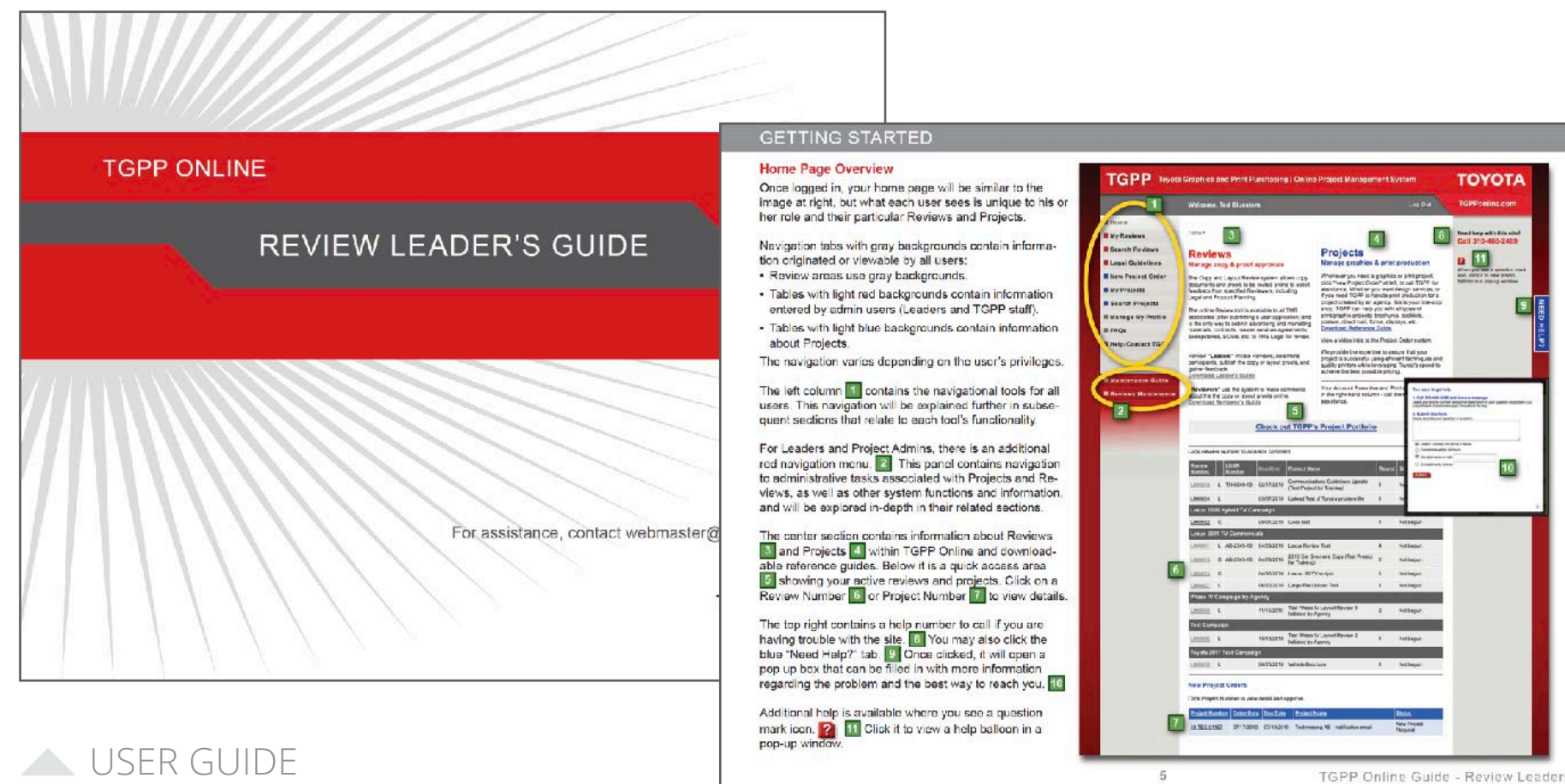
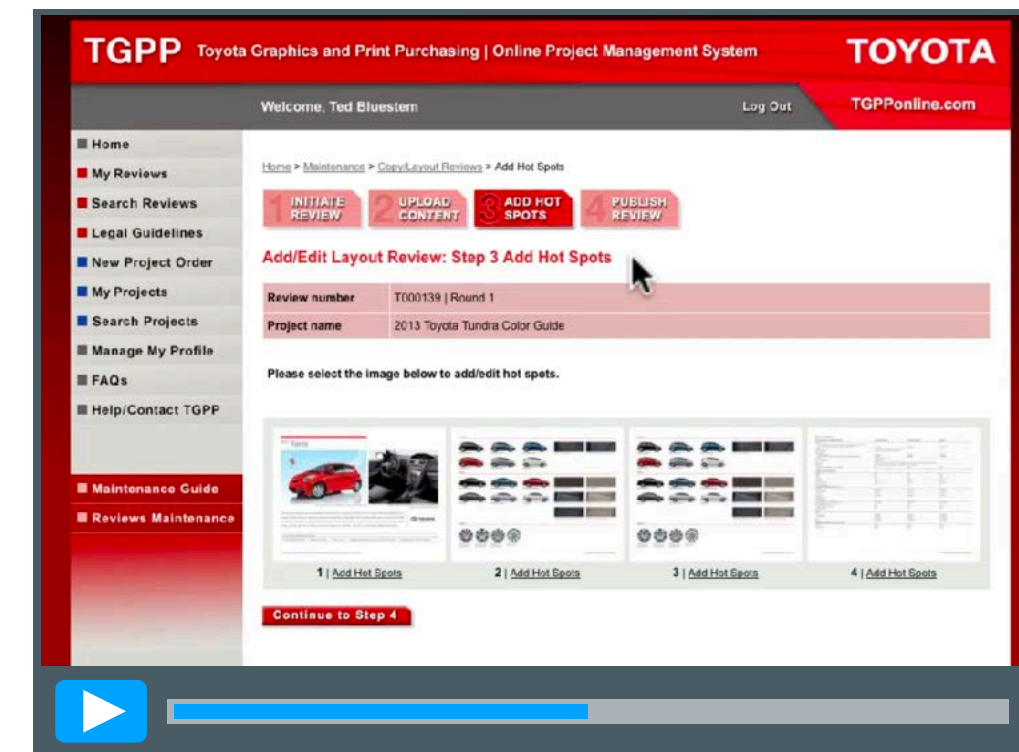


## USER TRAINING

- ▶ I was responsible for the development of user training materials.
- ▶ These were produced as a series of tutorial videos and downloadable PDF guides, all available on the site.
- ▶ I've conducted numerous in-person and online user training sessions.



▼ USER TRAINING VIDEOS



## A LAYOUT REVIEW

reference documents for this DF (optional). **1** Participants see these, but they won't be able to click these files.

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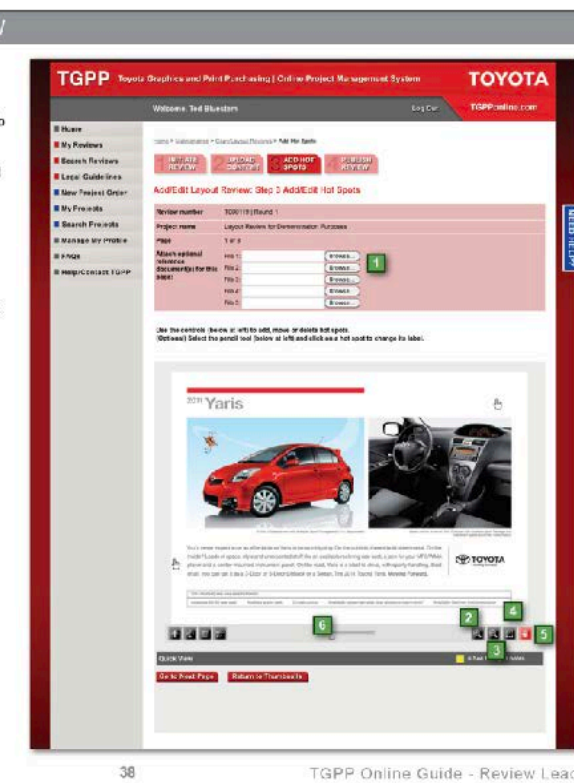
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## REVIEW

### Request a Review

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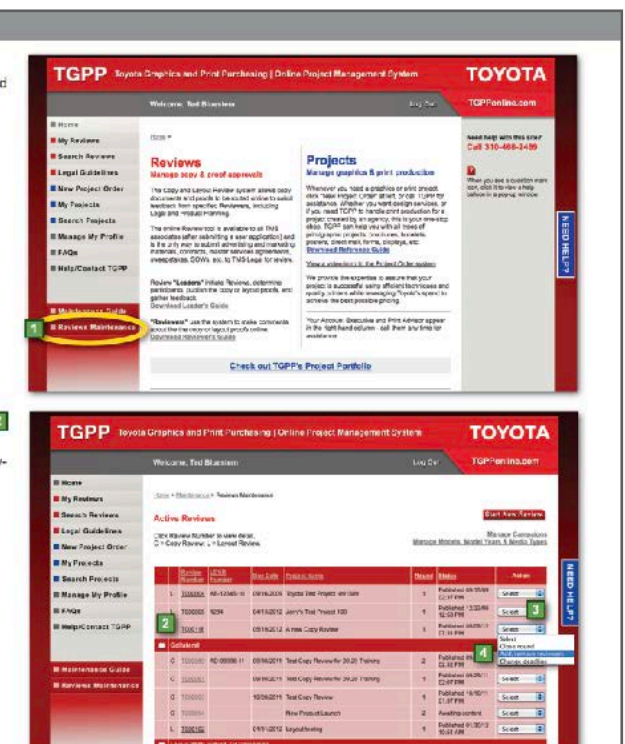
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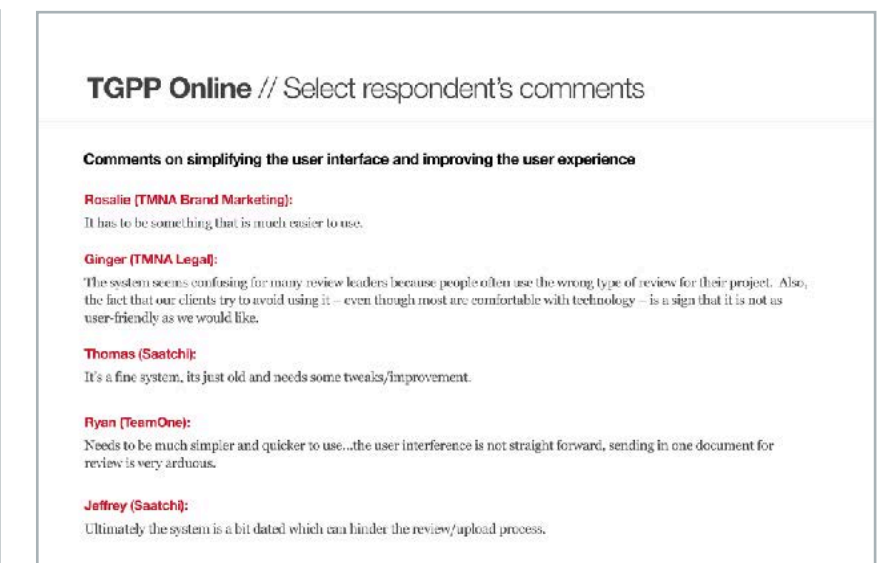
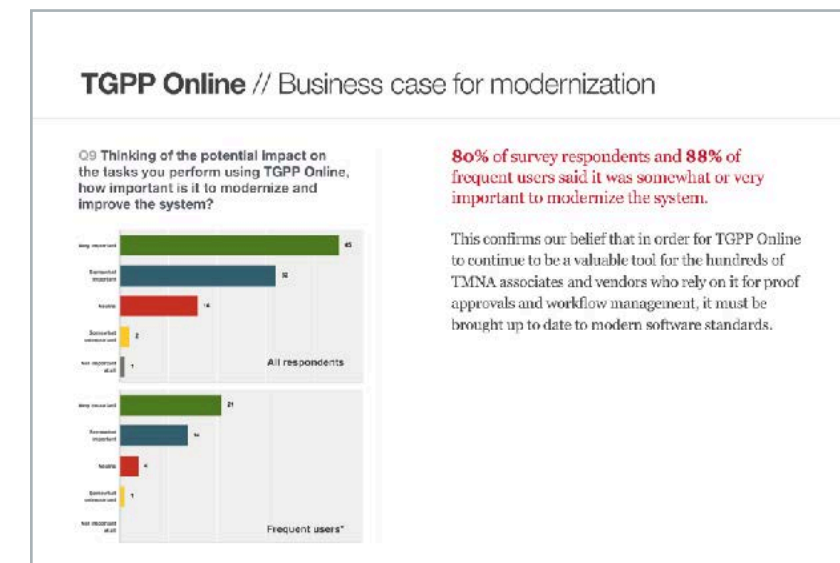
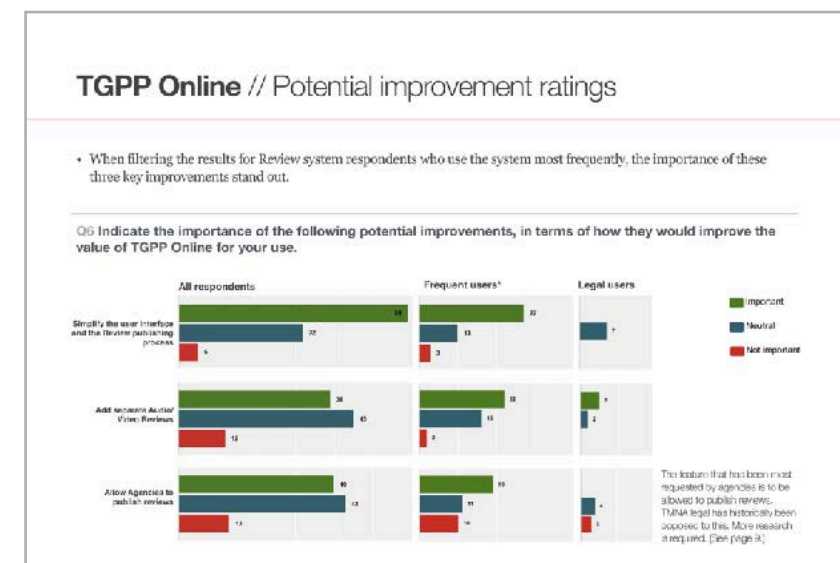
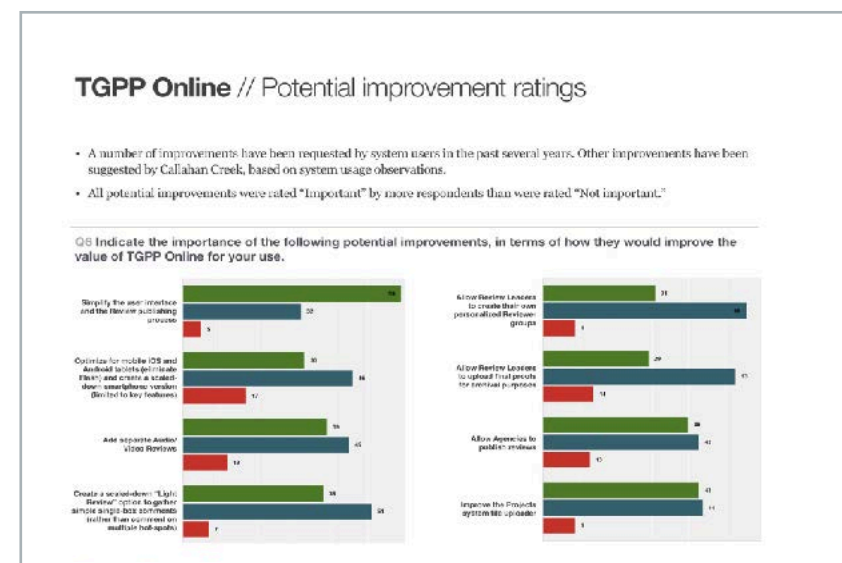
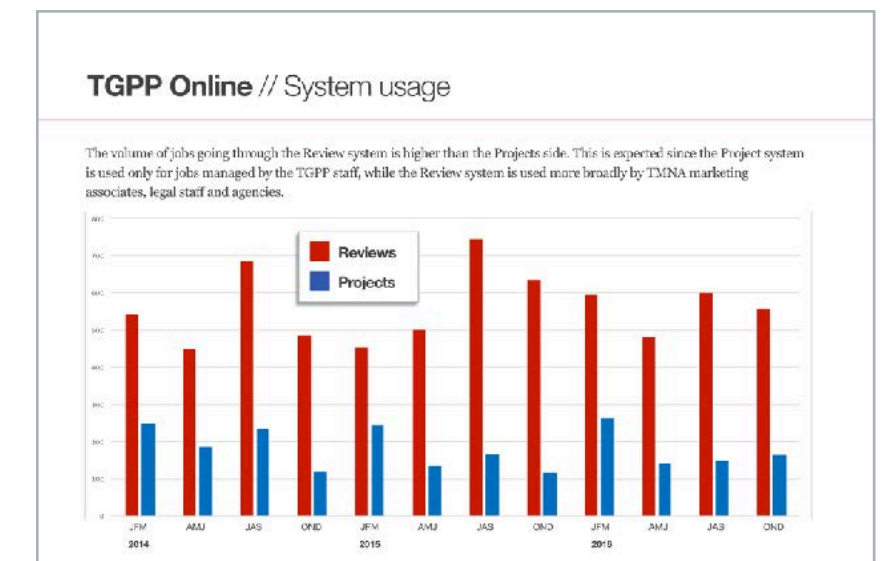
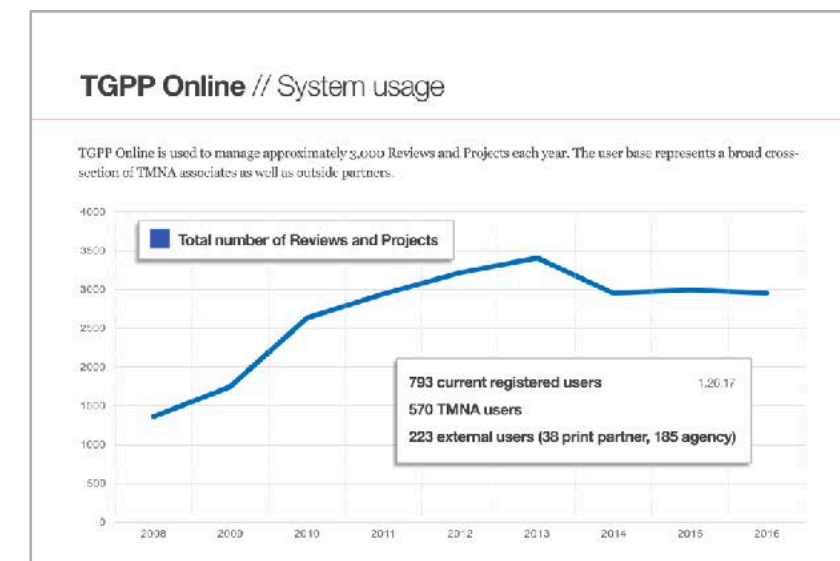
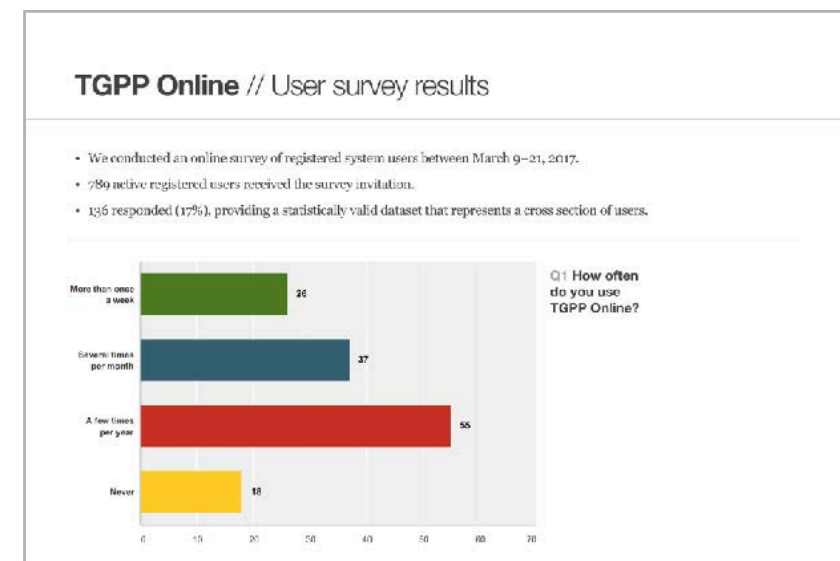
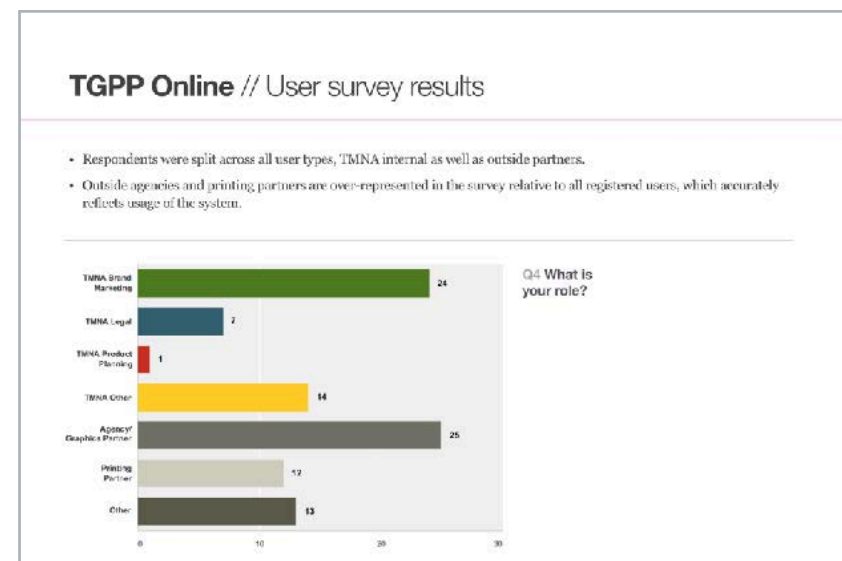
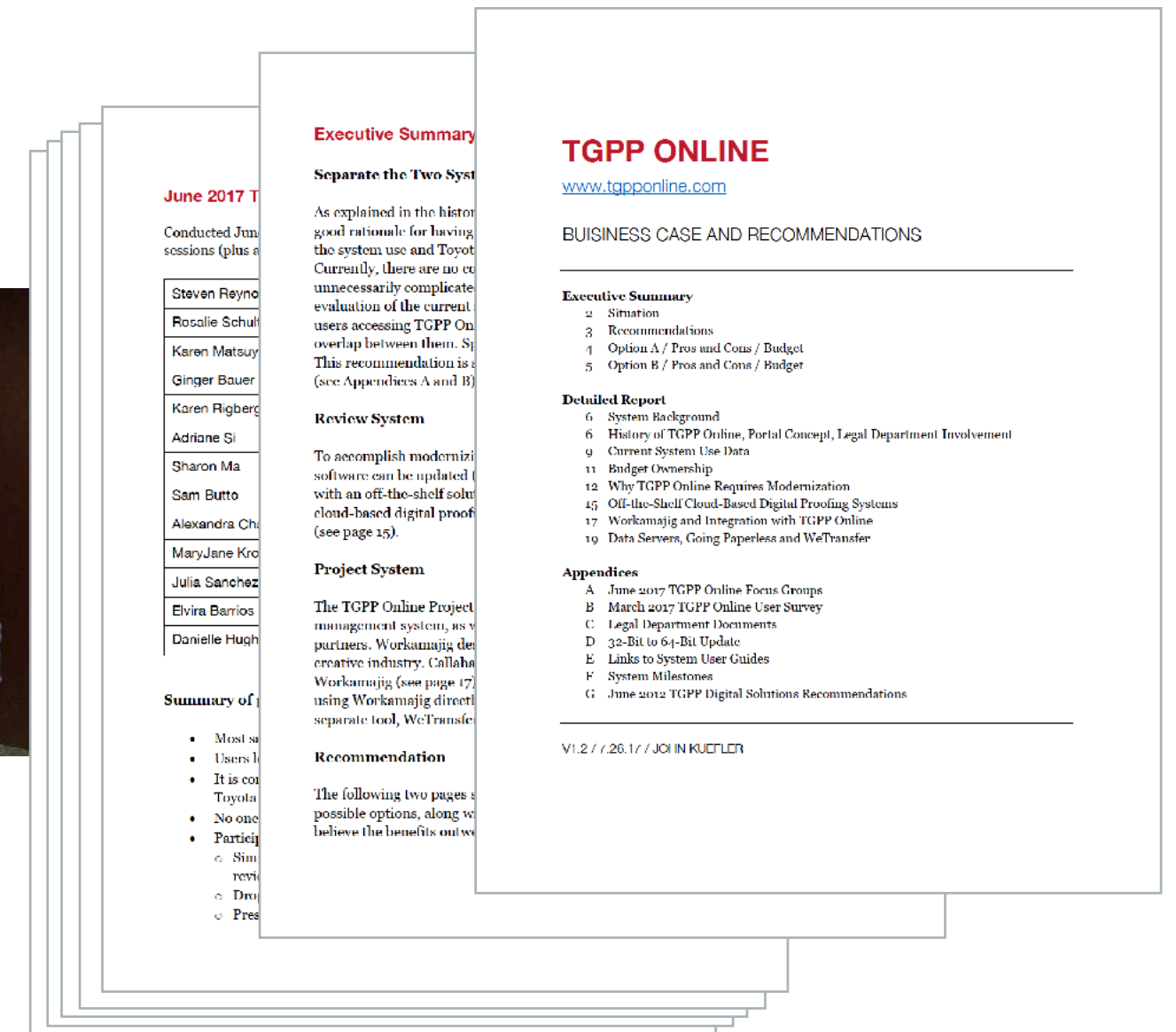






## USER RESEARCH

- ▶ Over time since its launch in 2009, the review system had many features added which made it more and more complex for users.
- ▶ I conduct user focus groups and online surveys in 2017-18 to assess usage and gather suggestions for improvements.
- ▶ I wrote a summary of the findings and made recommendations for improvements, including updating the UI and user flow for a more intuitive experience and removing obsolete features to simplify the system.





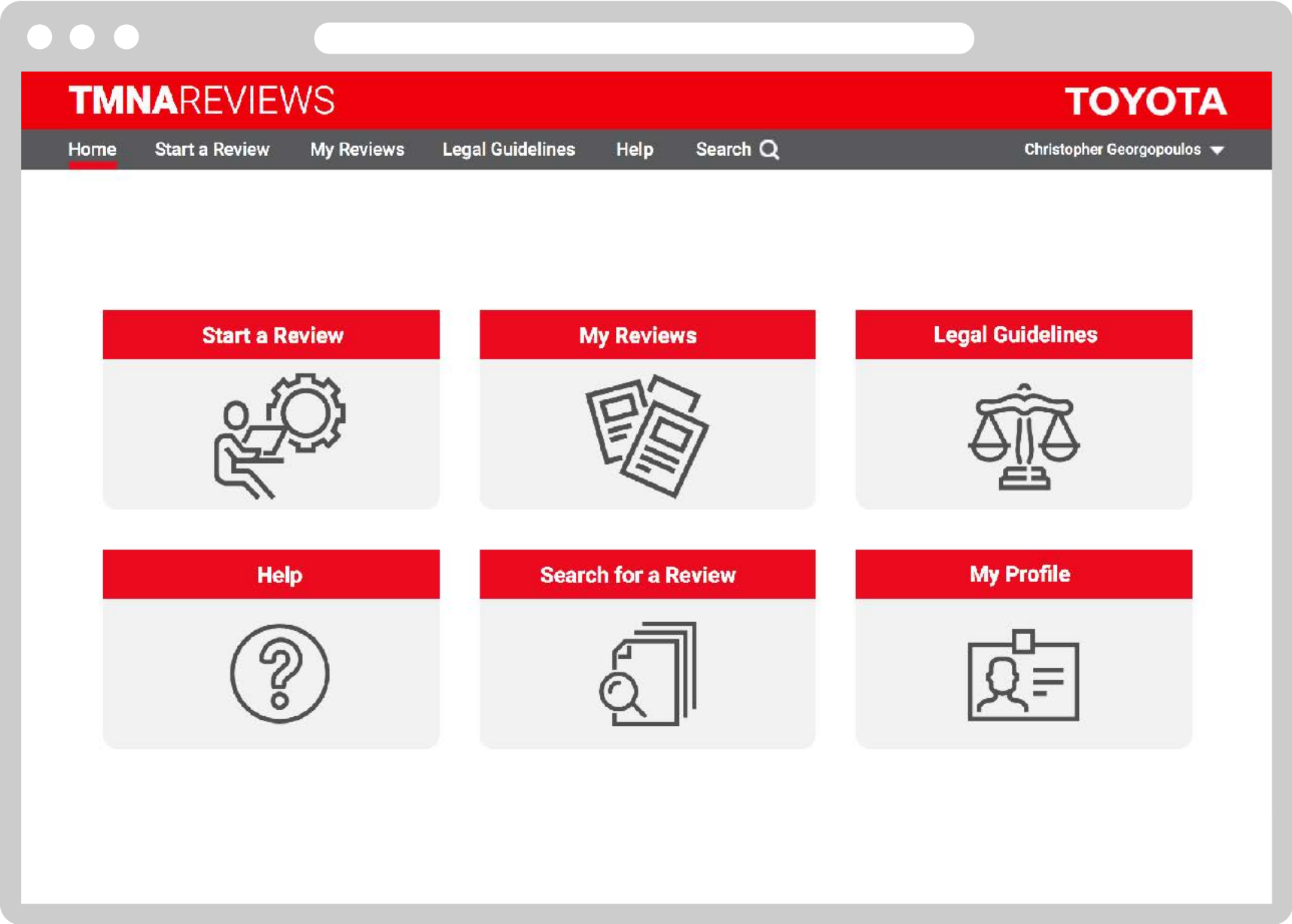
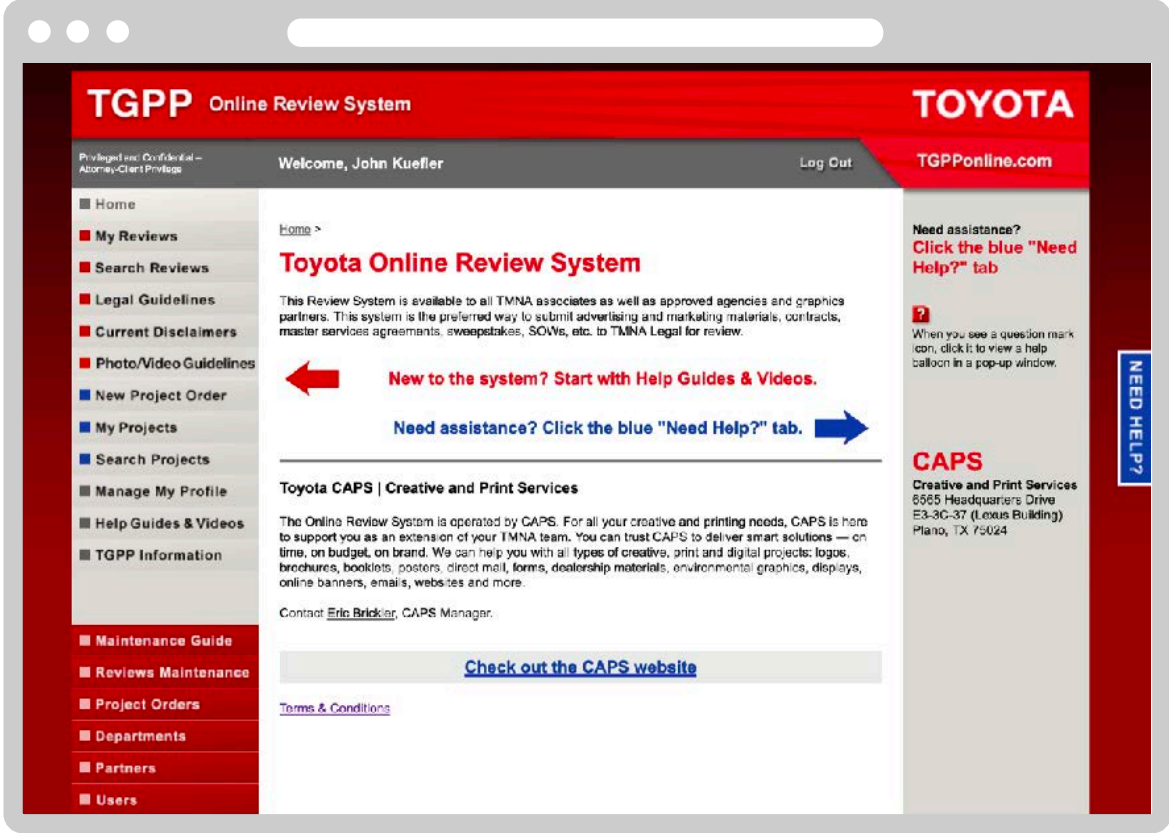


UX/UI UPDATE

- ▶ Based on the user feedback and my own heuristic evaluations, a new UI design is in progress.

UI UPDATE

CURRENT HOME PAGE

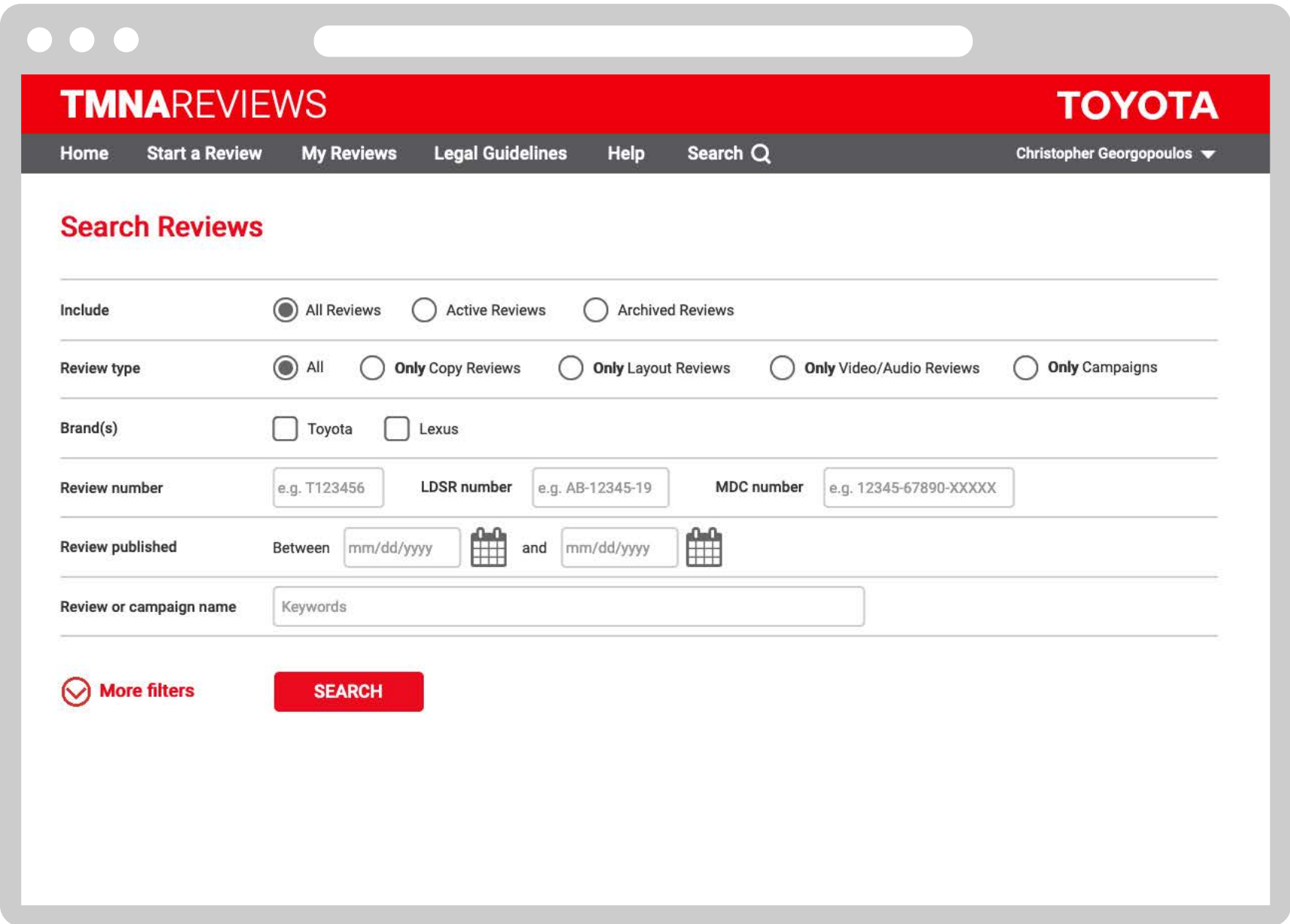
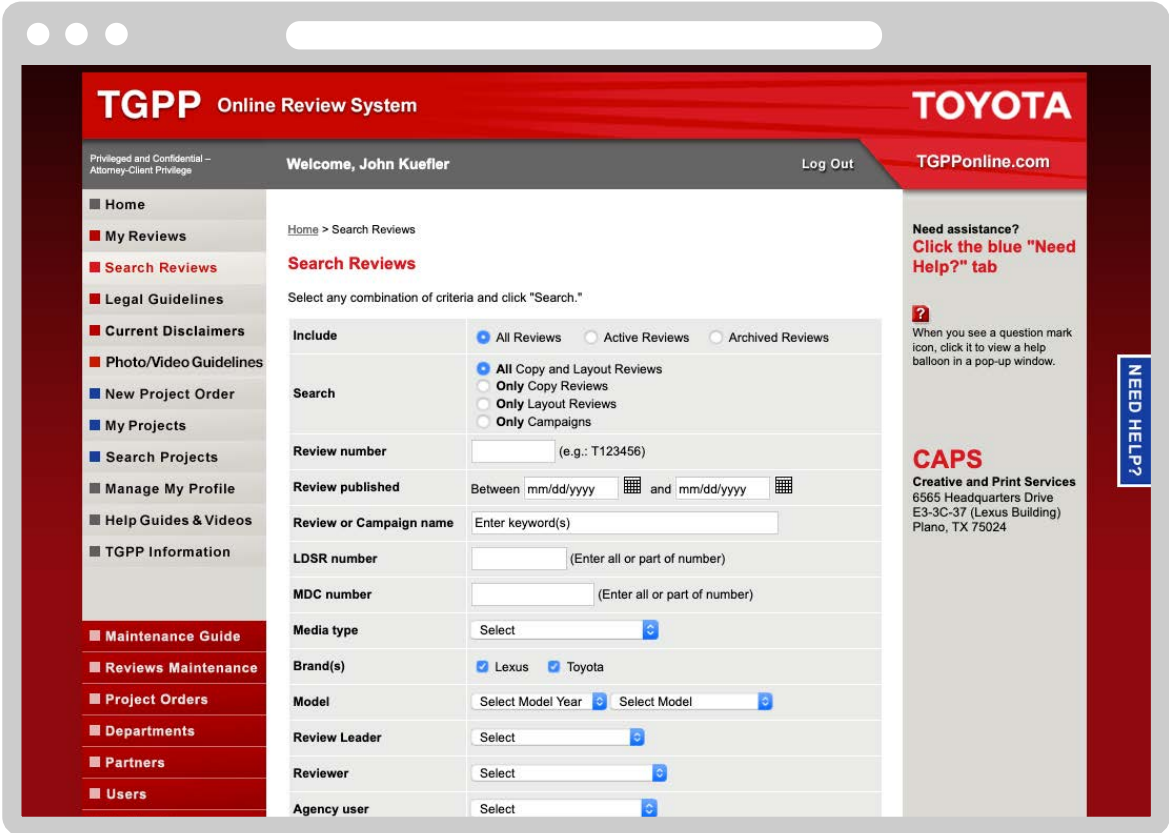


AXURE  
PROTOTYPE  
OF UI UPDATE



UI UPDATE

CURRENT SEARCH PAGE





## CHALLENGE

Sprint sends hundreds of emails and direct mail pieces to millions of customers and prospects each year. Preparing content for all those emails and mailings was manual and time-intensive. Sprint requested recommendations for streamlining the process.

## SOLUTION

I proposed creating a web application to automate and standardize the operations required to create the emails and direct mail pieces, improving quality, ensuring accuracy, and saving time and money.

## MY ROLE

- ▶ Project lead
- ▶ Business analysis
- ▶ System architecture
- ▶ Translated business needs into development requirements
- ▶ UX/UI design
- ▶ Technical development oversight
- ▶ Documentation and user training/support





## APPROACH / FEATURES

- ▶ Assembling the elements for an email or direct mails piece (copy, images, legal disclaimers, email subject lines, snippet copy, links and tracking tags) is done via a step-by-step wizard.
- ▶ Depending on their roles, users manage different steps (e.g., a graphic artist adds images, a writer adds copy, etc.).
- ▶ Built-in workflow moves tasks from one contributor to the next.
- ▶ The result of the wizard workflow is the creation of a complete “product record” that contains everything required to produce a specific email or printed direct mail piece.

### STEP-BY-STEP WIZARD

1 START FROM SCRATCH OR COPY EXISTING RECORD

2 PROVIDE GENERAL INFORMATION

3 ACCT. MANAGER ADDS BRIEF; WRITER ADDS COPY

4 IMAGES ARE ADDED FROM IMAGE LIBRARY

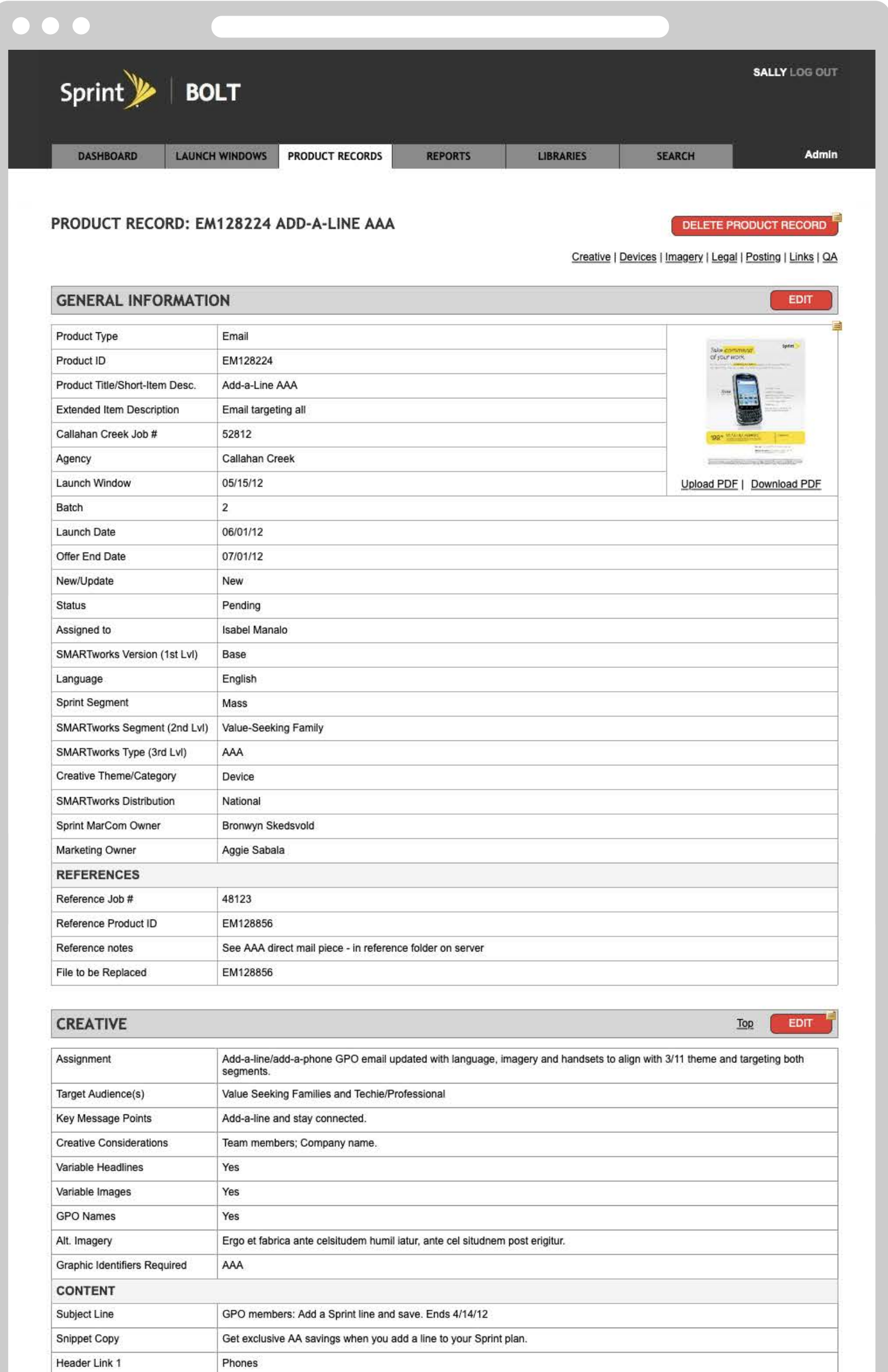
5 LEGAL DISCLAIMERS ARE ADDED FROM LIBRARY

6 LINKS AND TAGS ARE CREATED



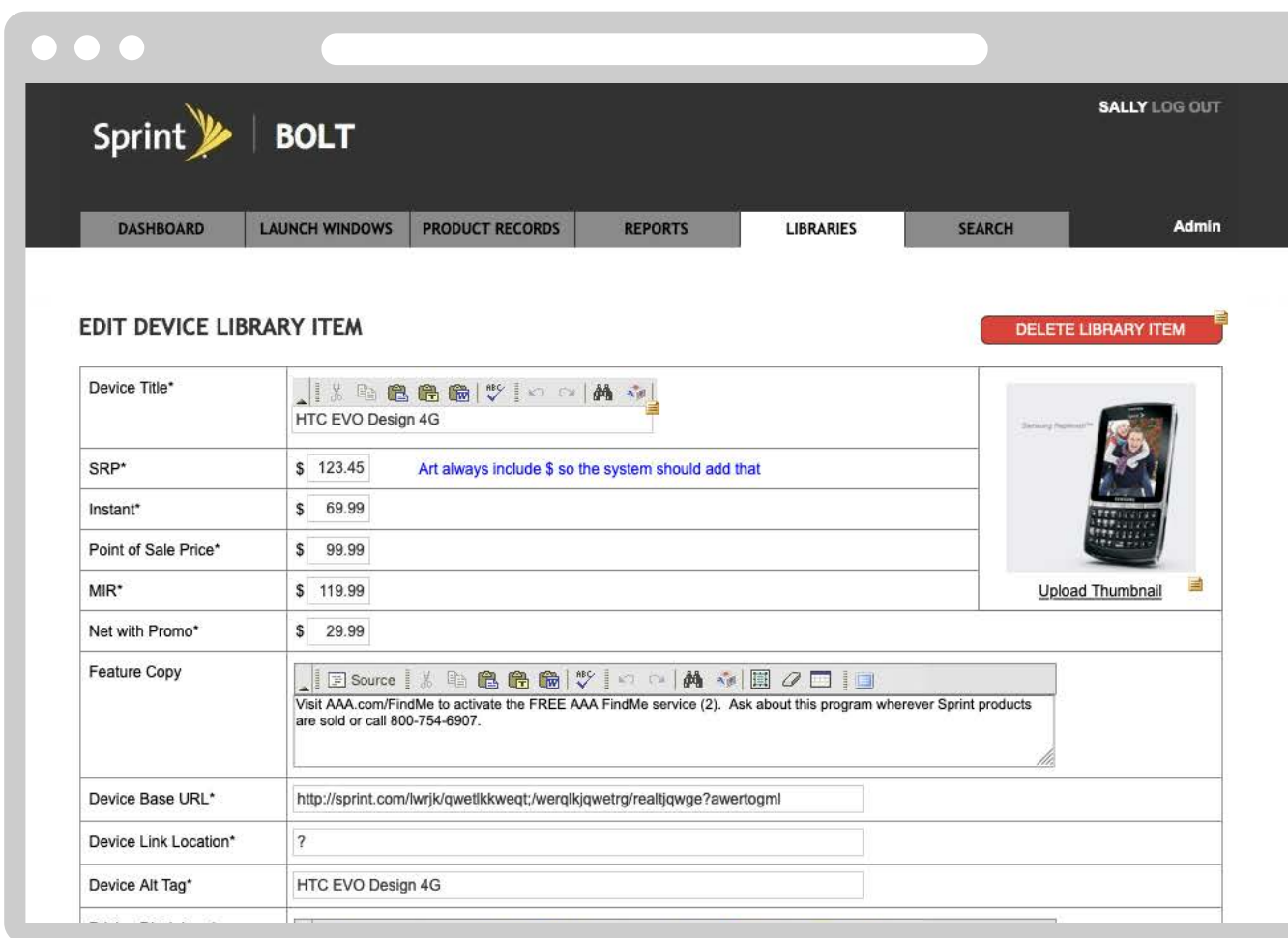


- ▶ Image, disclaimer and tag libraries allow standard elements to be kept up to date and to be efficiently added to each piece via the wizard.
- ▶ Finished products are archived in the app database for reference and reuse. Past records are easily found using a custom advanced search feature.

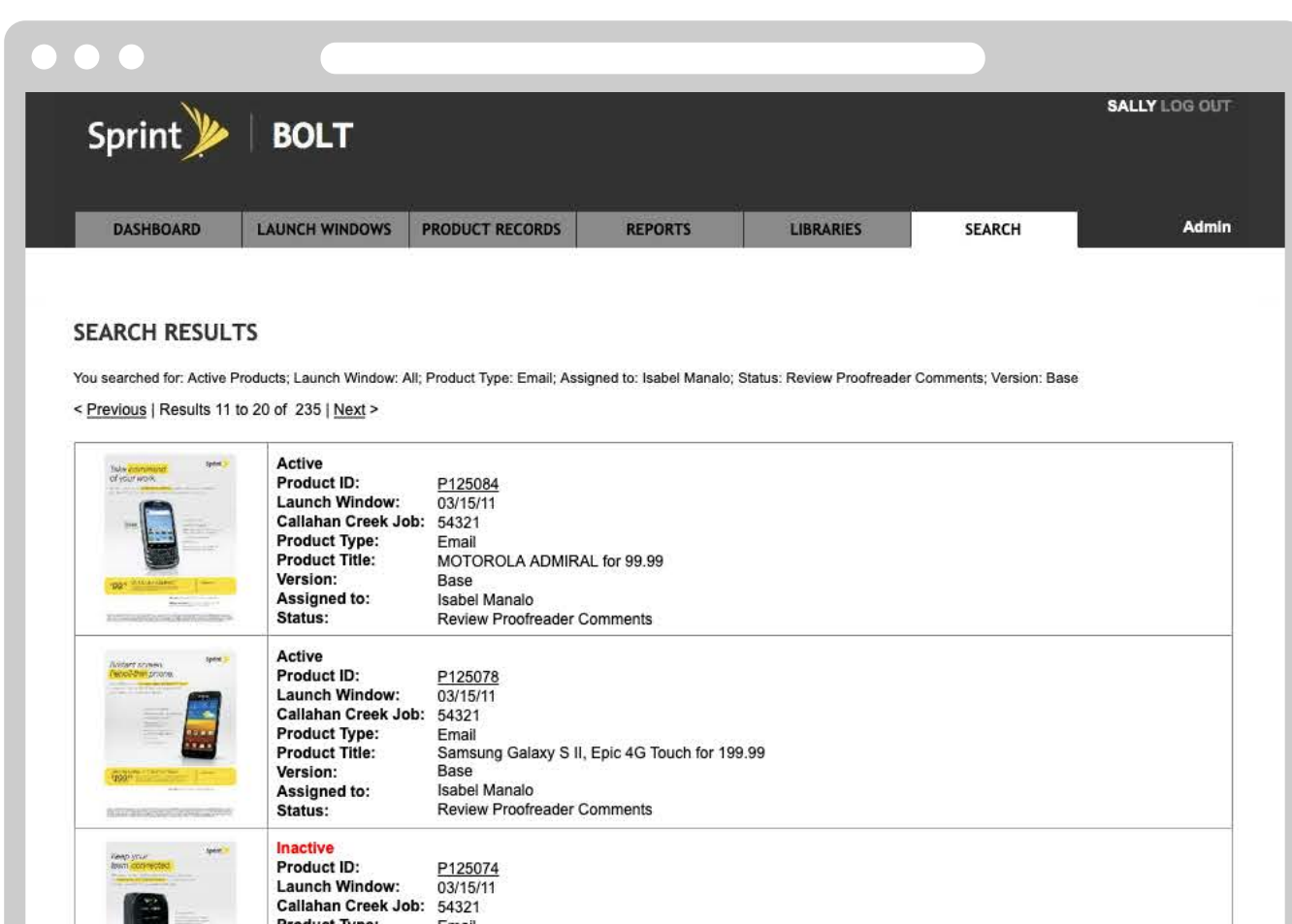


◀ A COMPLETE PRODUCT RECORD

▼ IMAGE LIBRARY



SEARCH ENGINE TO LOCATE PRODUCT RECORDS







## LINK AND TAG MANGEMENT

- ▶ One of the features of this app that saves the most time and reduces QA issues is the automated creation of URLs with tracking tags for emails.
- ▶ Prior to this app tags were created manually and were often prone to human error.
- ▶ I clarified the complex formula for tag creation and translated it into requirements for the dev team along with all the other specifications.

LINKS

Top EDIT STEP 1 EDIT STEP 2

HTML EMAIL LINKS

Header

Snippet	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Sprint logo	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Phones	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Accessories	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Digital Lounge	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Service Discounts	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Body

CTA button-Learn	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Device 1 image	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - Facebook	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - Twitter	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - YouTube	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Footer

Sprint.com/business	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
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Legal

Unsubscribe	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Privacy Policy	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Sprint.com	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Terms & Conditions	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Mobiltv.com	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

TEXT EMAIL LINKS

Header

Snippet	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
---------	--

Body

CTA button-Learn	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Device 1 image	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - Facebook	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - Twitter	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Social Dashboard - YouTube	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Footer

Sprint.com/business	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
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Legal

Unsubscribe	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Privacy Policy	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Sprint.com	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Terms & Conditions	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
Mobiltv.com	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

DEVICE LINKS

Device 1 - <<Device Title>>

EDIT

Device	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
CTA	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Device 2 - <<Device Title>>

EDIT

Device	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
CTA	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

Device 3 - <<Device Title>>

EDIT

Device	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint
CTA	http://sprint.sprintusc.com/unsub/unsub.form?id=4448a5e769cf88c28ca35b2c848f07e8 + Omniture tagw.facebook.com/sprint

QA

Top EDIT

## URLS GENERATED BY THE APP

URL Builder (Email Product only)

At any point in the workflow, a Digital Producer or Account Manager can prepare the Links needed for email products. To start, they locate the product on their dashboard (or via search) and click the Links Step 1 Edit button on the Complete Product Record page.

LINKS

HTML EMAIL LINKS

Header

Step 1:  
http://digital.callahencreek.com/clients/sprint-biz/52000/prototype6/Product\_Record\_Links\_Step\_1.html

Step 2:  
http://digital.callahencreek.com/clients/sprint-biz/52000/prototype6/Product\_Record\_Links\_Step\_2.html

For each required link specified by checking a box on the Step 1 page, a URL is built by the system and placed in an editable field on the Step 2 page, using the following business rules:

Business rules for Links:  
(Base URL)&ECID=MA:EM:(Launch Date);IL:(Product ID);(Link Location)

If Text option is clicked:  
(Base URL)&ECID=MA:EM:(Launch Date);IL:(Product ID);(Link Location)

The (Date from the Launch Window Title, converted to YYYYMMDD – e.g. Launch Window 05/10/12 = 20120510) and (Product ID).

For the following Links types, the (Base URL) and (Link Location) elements will be found in the Link Library:  
Header Special Header  
Body Special Body  
Footer Special Footer  
Legal Special Legal

For Devices and Device CTAs, there is one difference for the Link – there is an ampersand immediately following the Base URL instead of a question mark:  
(Base URL)&ECID=MA:EM:(Launch Date);IL:(Product ID);(Link Location)

Note: Product IDs that include ".SP" should convert the ".SP" to "\_SP\_" for link building.

Device Links

For Devices, the (Base URL) and (Link Location) elements will be found in the Device Library. The same business rules apply as above. The Device links are not specified on the Links Part 1 page, but rather they automatically generated by the system and appear on the Links Part 2 page based on which devices are specified on the Device page of the Product Record.

Updating Links when Product Records are copied

When Product Records are copied from old Products, the system should automatically update all the links on the Links 2 page using the new Launch Window Date and the new Product ID.

BOLT

Sprint Biz Online Workflow Tool

Callahan Creek, Job #52000

Development specs v1.0

April 9, 2012

Overview

BOLT Biz Online Tool is a web application designed to manage workflow for Callahan Creek's Sprint Biz & web. Our work for this client encompasses management, creation and production of articles for approximately 100 individual marketing elements (emails, postcards, etc) needs the users of each "Launch Window" (which can be thought of as a "campaign") inclusion of all the elements for a given product (postcard). There is a new Launch Window every 8-9 weeks.

Goals

The objective of the workflow tool is to facilitate and improve the accuracy and efficiency on the work. This will be accomplished by:

- Creating a single online database where all information (information is stored, rather than relying on remembering a number of Excel spreadsheet addresses).
- Automating some processes that are currently done manually.
- Eliminating duplication of effort between Callahan Creek team members.
- Allowing some Production resources to process simultaneously, which are now performed in linear steps.

Definitions

Launch Window: A group of up to 100 individual promotional pieces (brochures, postcards, letters, bill inserts) that are created by Callahan Creek in a set timeframe. Callahan Creek defines elements of Time for each piece to Standard Progress. Launch Windows are identified by a Launch Window Title, which is a GMS (MAG/CTY).

Standard Progress: The Sprint Biz workflow manages an online catalog of all the production of pieces (brochures, postcards, letters, bill inserts, etc) under production pieces from the SMARTVista Catalog.

Product: One Product is one promotional piece. There are specific classifications of Products: Brochures, Letters, Bill Inserts and Postcards. Each Product type from a single set of information is captured in the system.

Batch: An arbitrary set of Products used by Callahan Creek to group the Products for a given time assignment and a scheduling process.

Product Record: A complete Product Record is all the data associated with one Product.

14

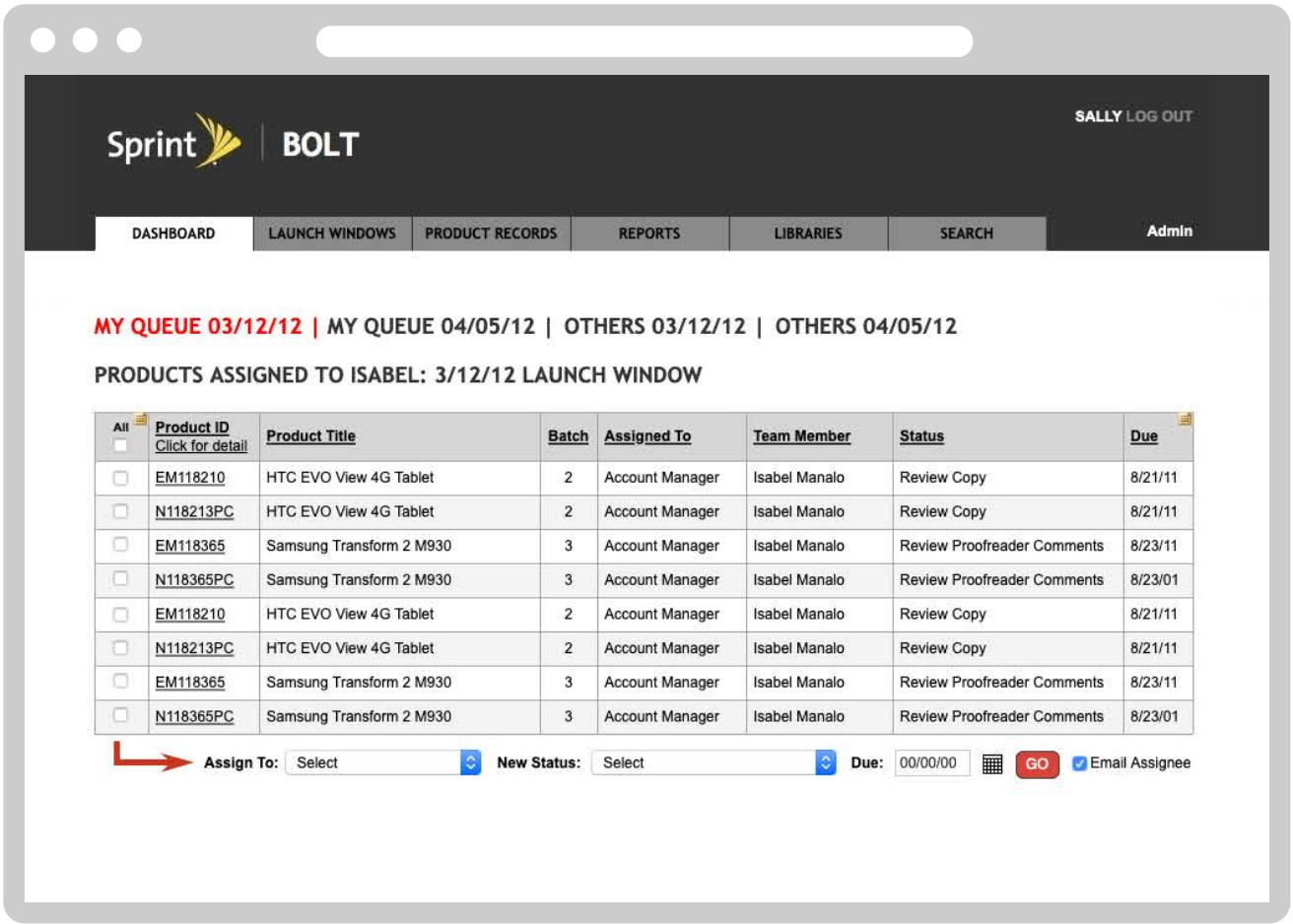




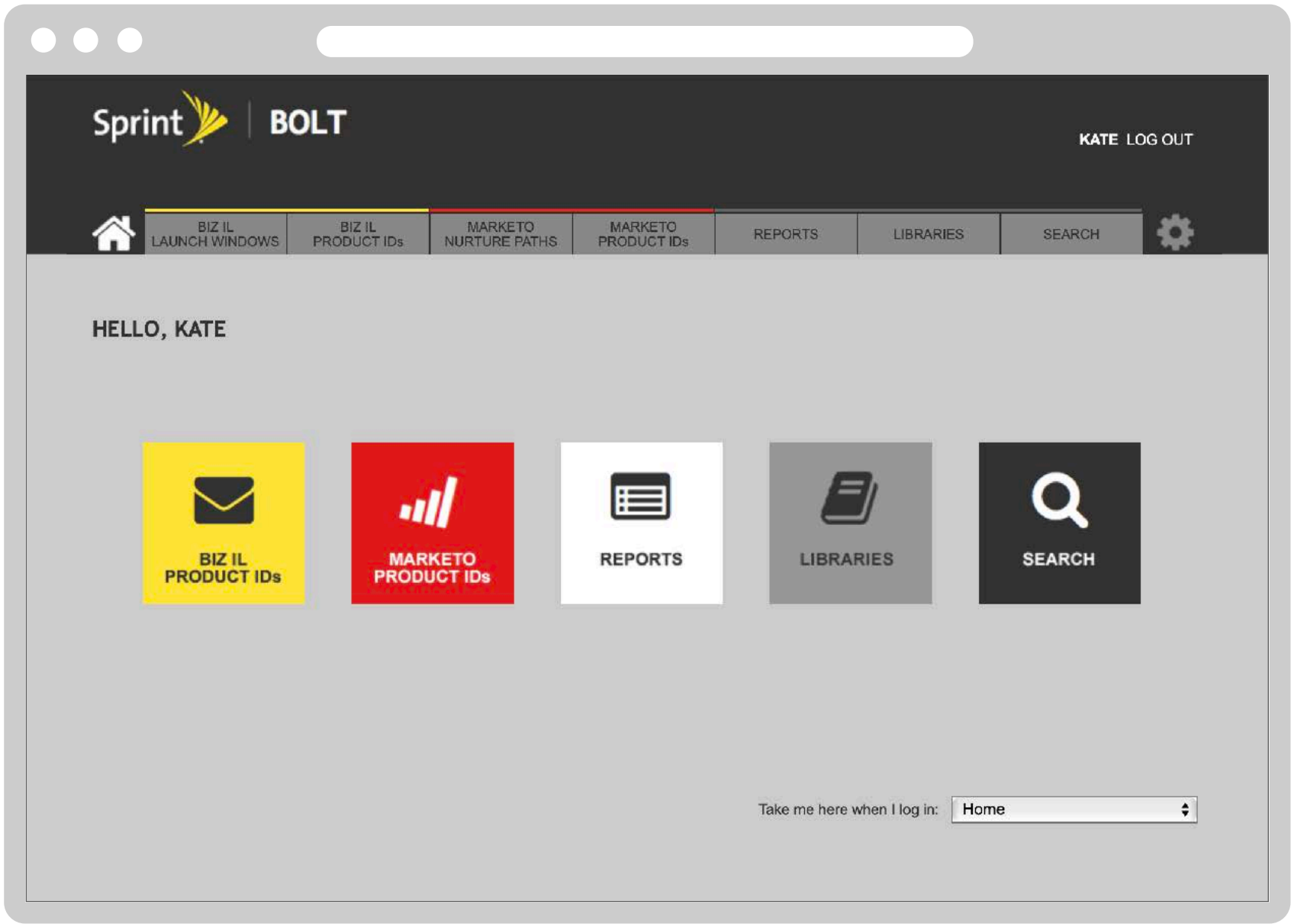
UI UPDATE

- ▶ The addition of Marketo as a Sprint email platform necessitated the expansion of BOLT to create Marketo emails in addition to those created for their other systems.
- ▶ This required a UI and functionality update to modify it to fit the Marketo requirements.

ORIGINAL UI



UPDATED UI



AXURE PROTOTYPE  
OF ORIGINAL UI



AXURE PROTOTYPE  
OF UPDATED UI





## CHALLENGE

Over time, Westar Energy's website became out of date. The user experience was poor, the site architecture confusing and the content had grown to hundreds of rarely visited pages. Program managers had created several independent websites. Westar had been looking inward instead of focusing on their customers.

## SOLUTION

I managed a thorough analysis of the sites from users' and customers' perspectives and a corresponding redesign. This resulted in a wholesale revamp of the sites: architecture, UI, navigation, visual branding and customer transactional features.

## MY ROLE

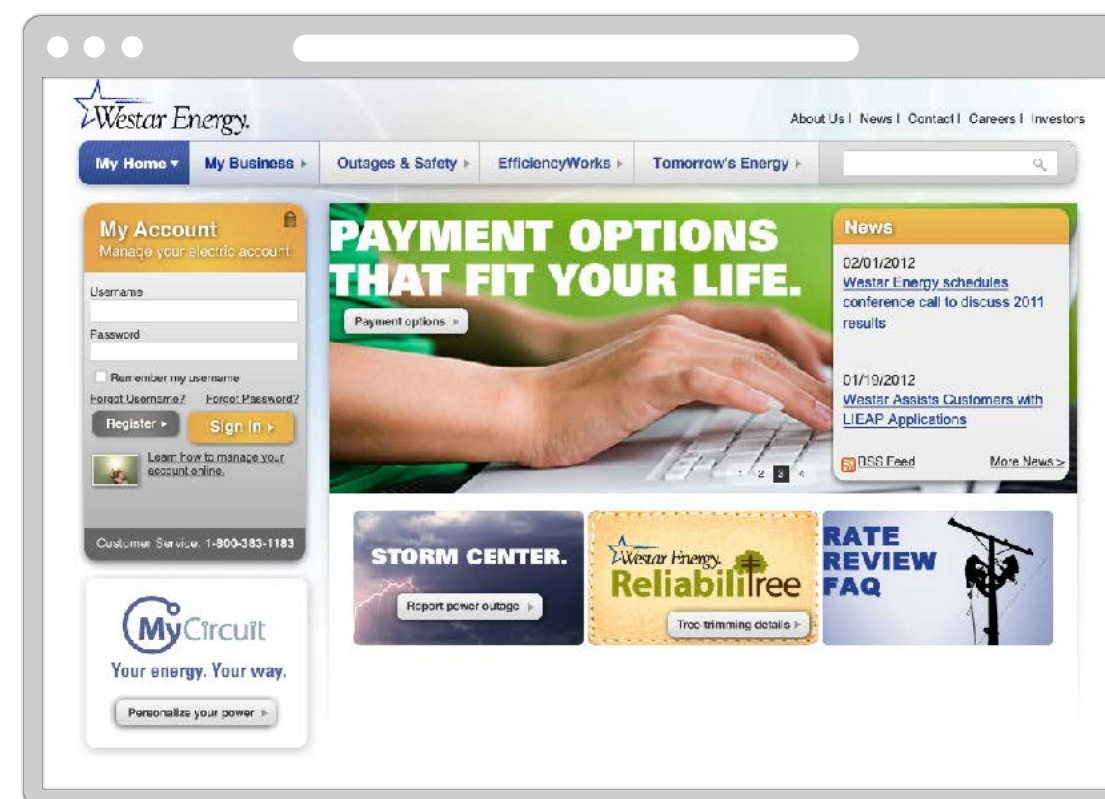
- ▶ Project lead
- ▶ Business analysis
- ▶ Project roadmap
- ▶ Information architecture
- ▶ UX/UI design
- ▶ User testing
- ▶ Technical development oversight
- ▶ Documentation



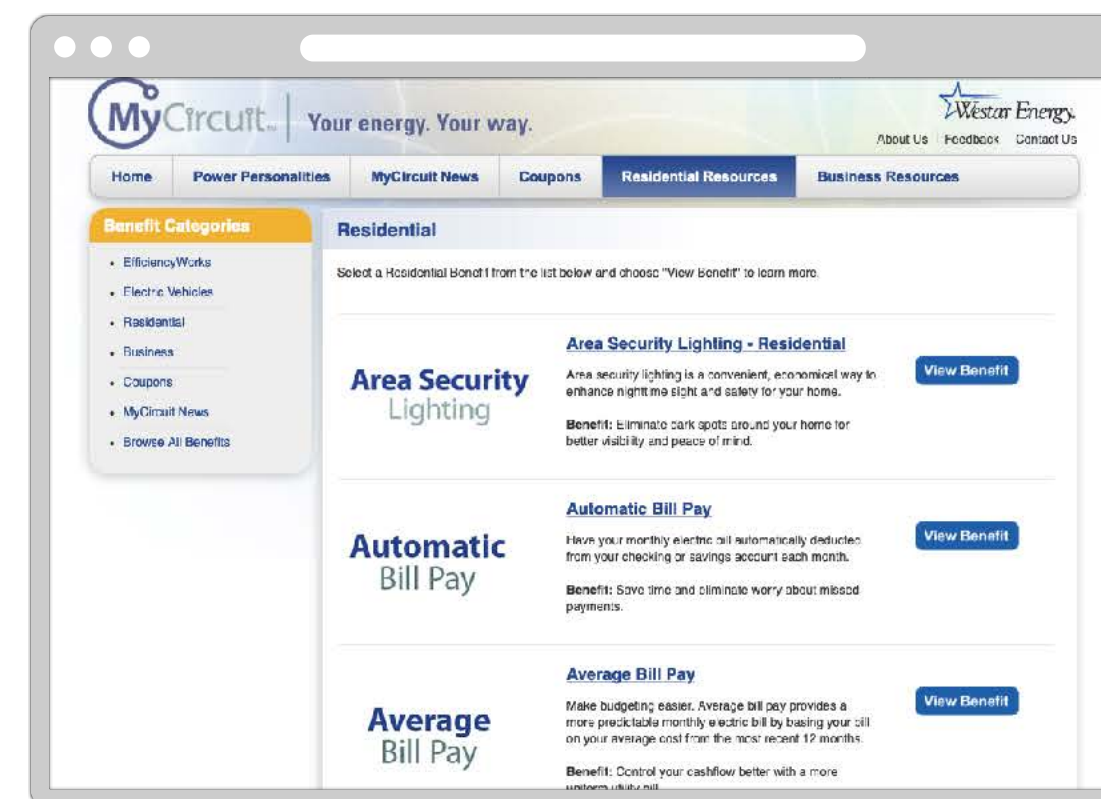
## SITUATION

- Westar's main website was cluttered with content as a result of competing priorities in the company. Everyone had pet project that was vying for attention.
- The site had grown into labyrinth of hundreds of pages of content — much of it rarely viewed.
- A few departments built their own stand-alone websites (MyCircuit for smart meter customers and ElectroGo for people with electric vehicles).
- The HR and Investor Relations departments maintained their own sites using third-party platforms.
- There was a lack of brand consistency.
- Customers' needs were being subordinated the internal priorities.

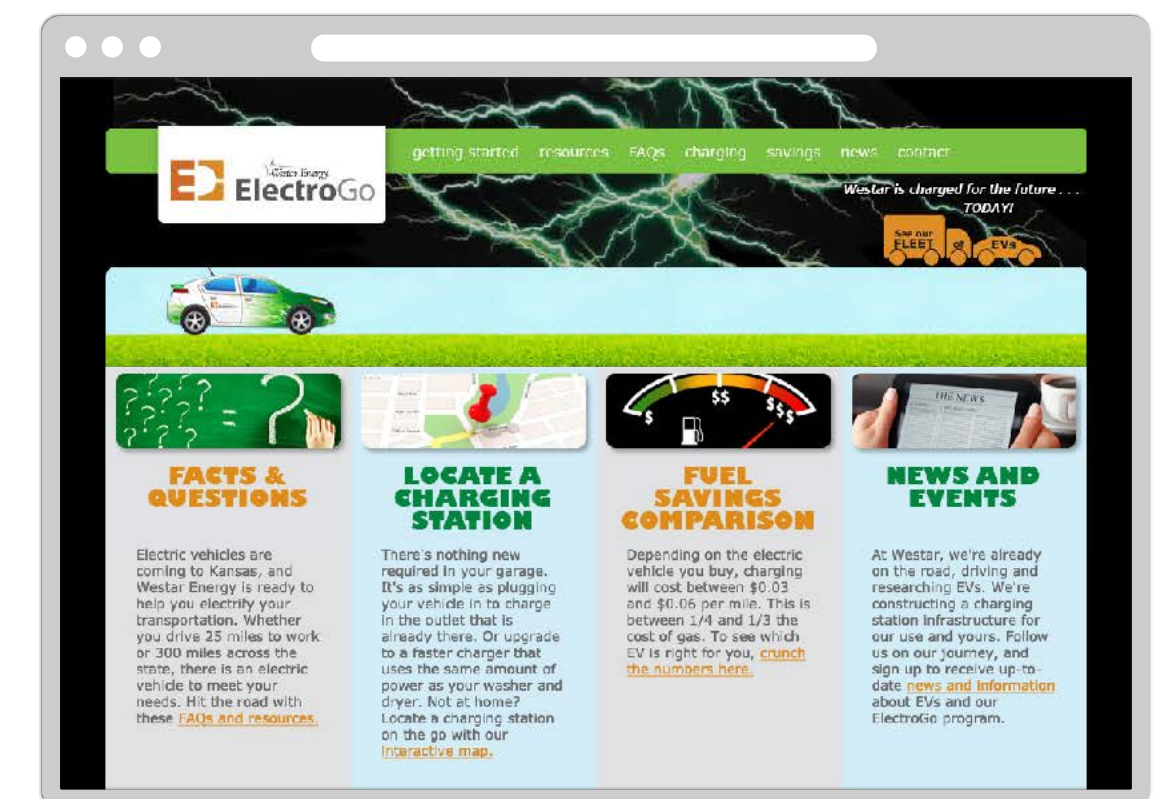
MAIN SITE



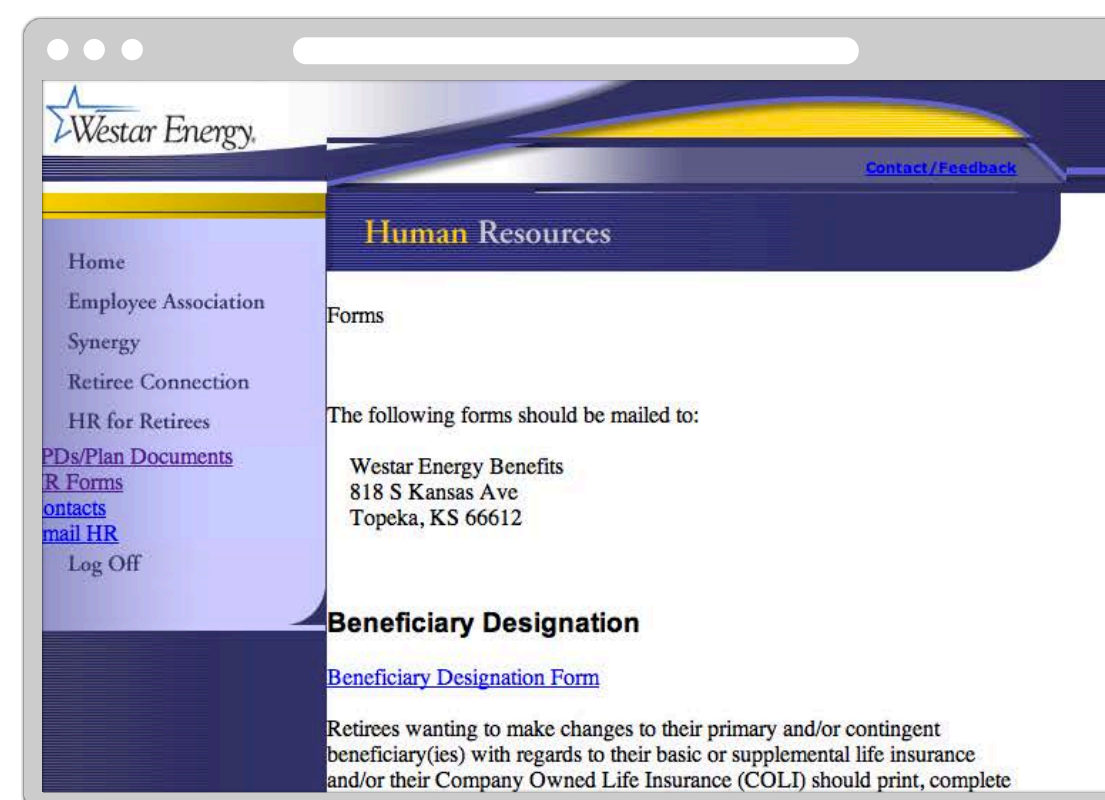
SITE FOR CUSTOMERS WITH SMART METERS



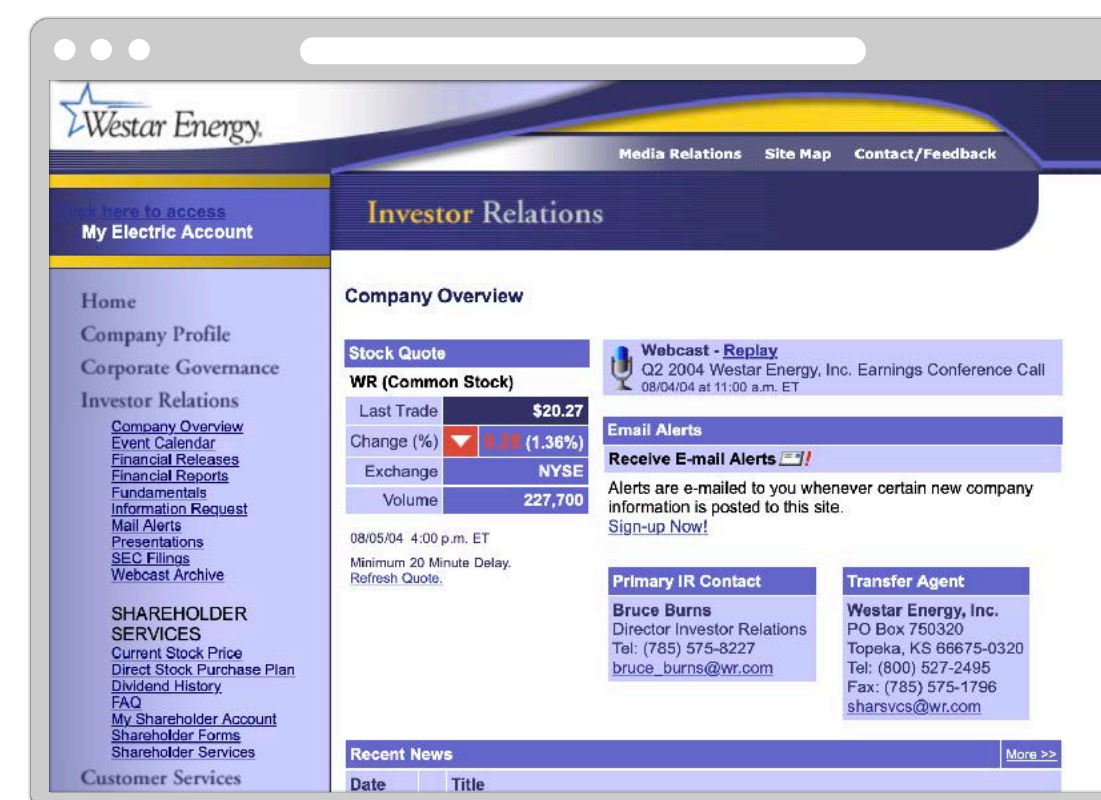
SITE FOR CUSTOMERS WITH ELECTRIC VEHICLES



HR SITE



INVESTORS SITE





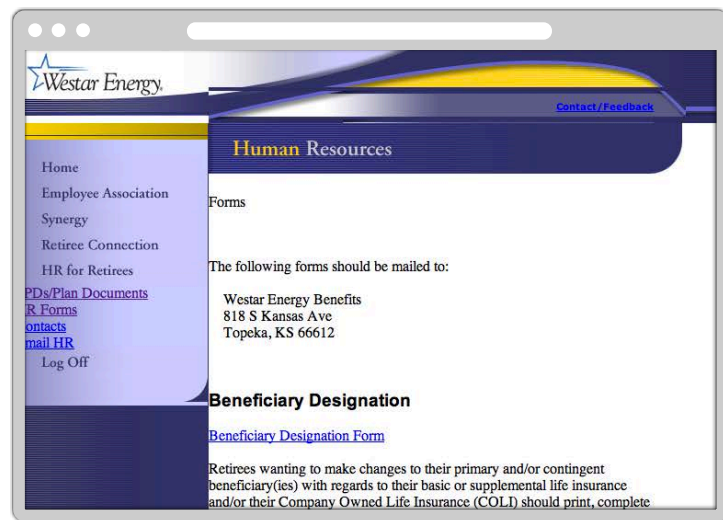
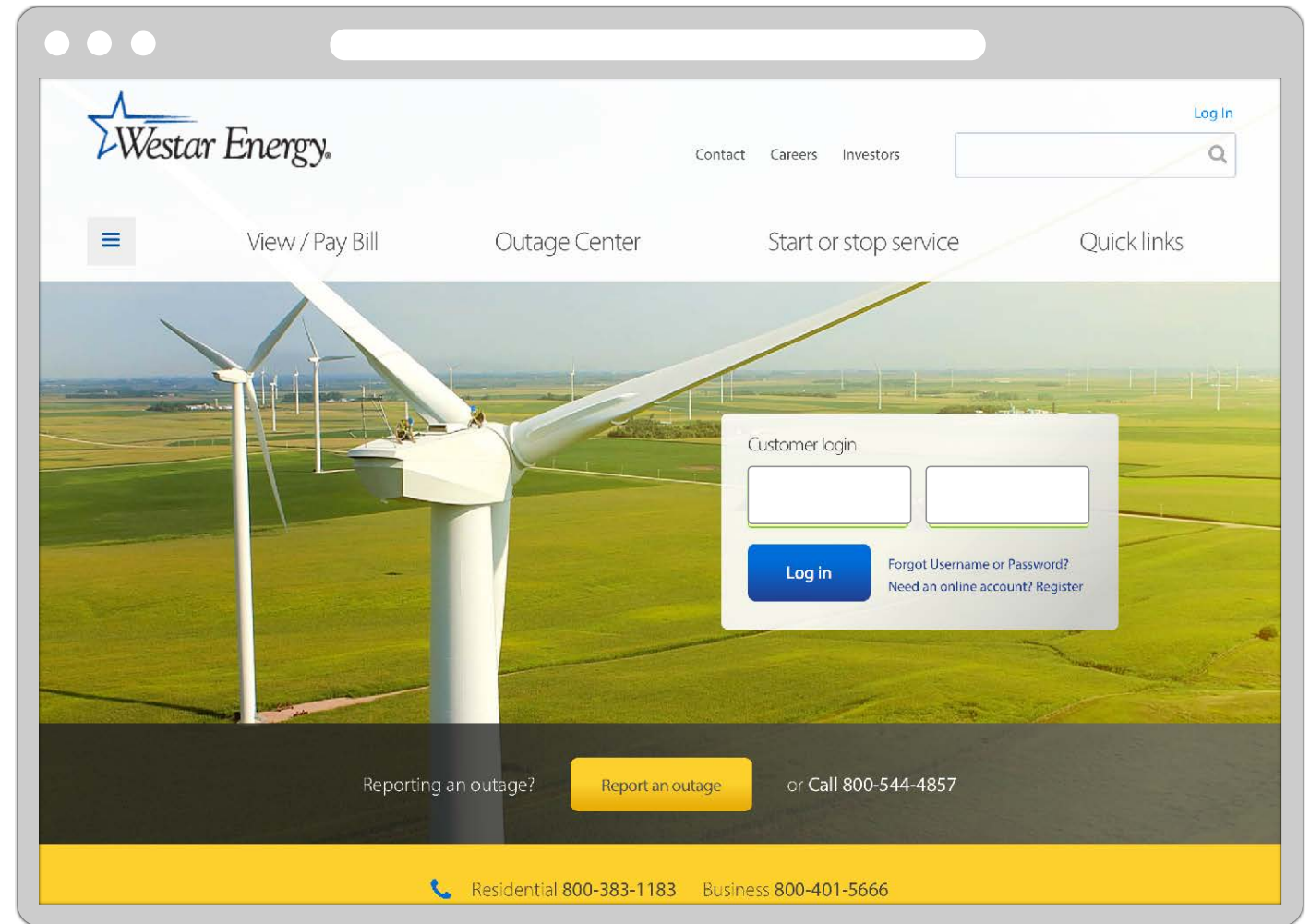


## APPROACH

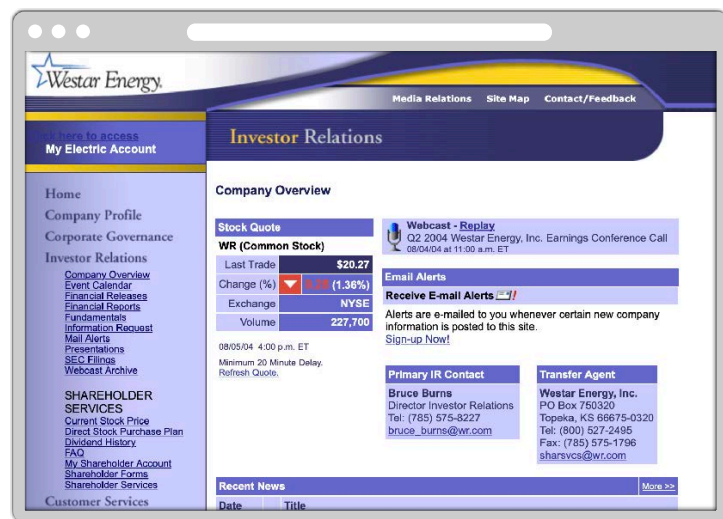
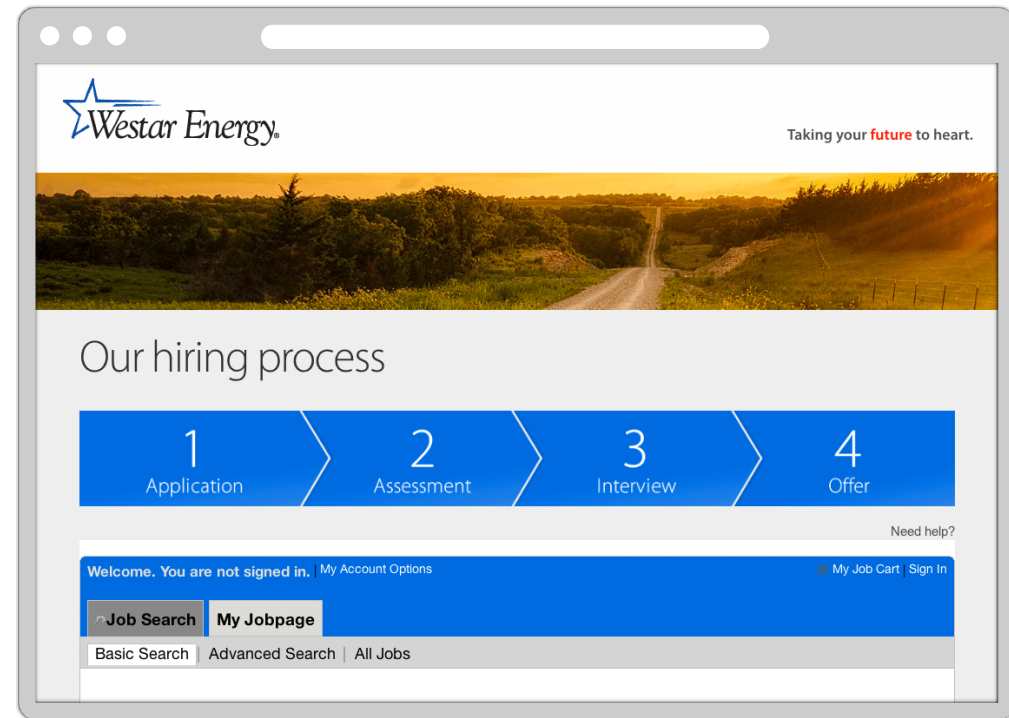
- ▶ The main site and the two stand-alone sites were folded into one.
- ▶ The HR and Investors sites — which had to remain on separate platforms — where reskinned to match.
- ▶ Navigation was simplified and content decluttered to correspond to the key reasons people used the site:
  - to pay bills
  - to check on or report outages
  - to start or stop electric service
- ▶ All other content was more or less a footnote in terms of traffic volume. Nonetheless, much of that content needed to be maintained, updated and better organized so it could be more easily found when needed.



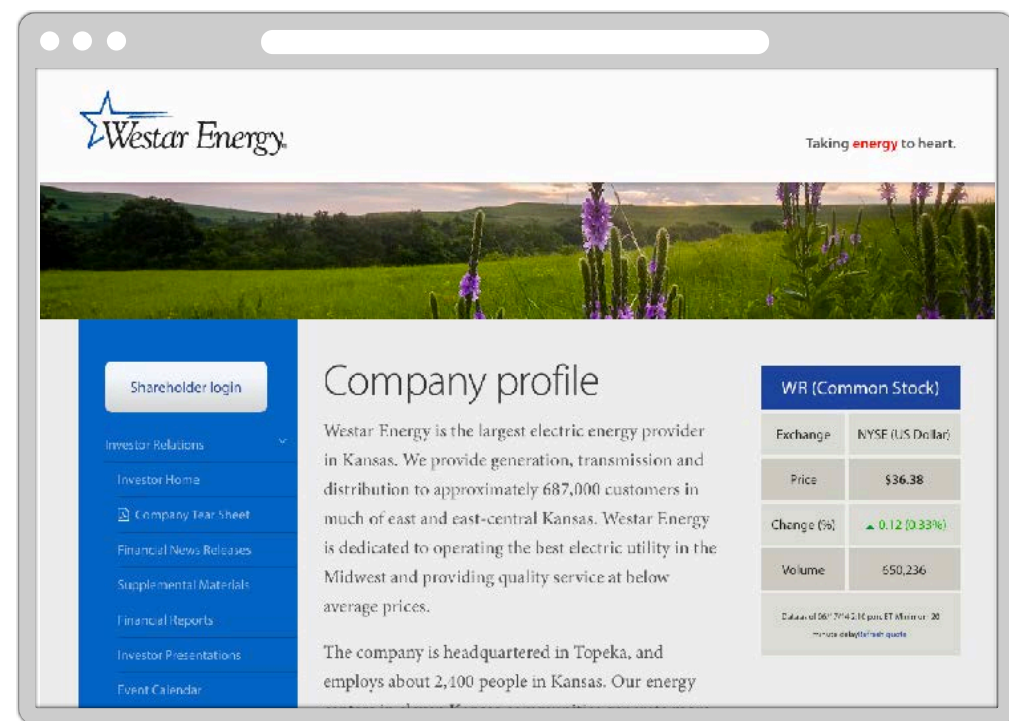
COMBINED



RESKINNED



RESKINNED

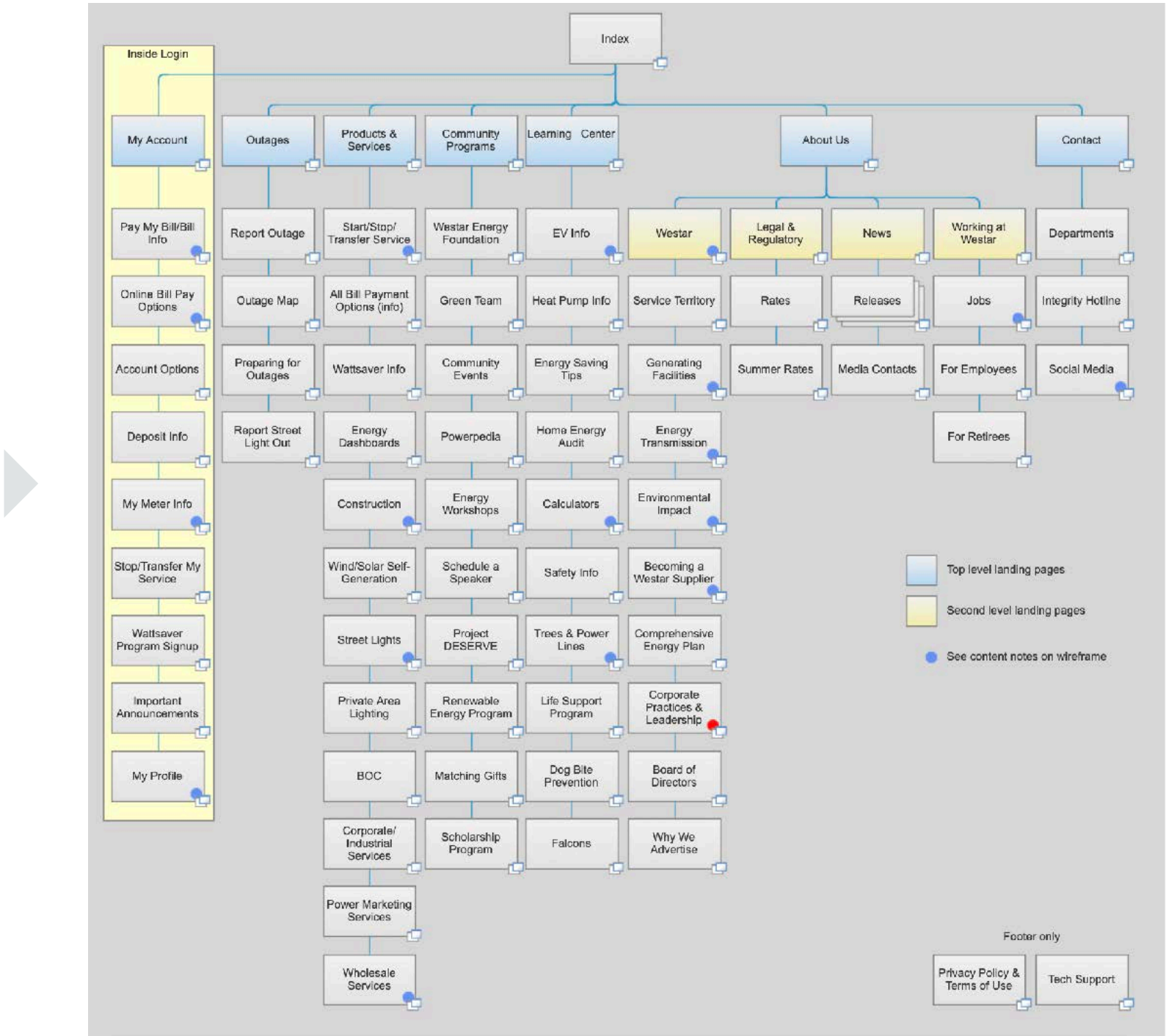






INFORMATION ARCHITECTURE

- ▶ To achieve the goal of combining the three sites and evaluating the content, I did an in-depth analytics review.
- ▶ As a result, the total number of content pages was reduced from over 700 to about 250.
- ▶ The remaining content was organized into eight sections based on user research (card sorting).
- ▶ The priority (transactional) content was placed in the top navigation.
- ▶ Access to all other content pages was intentionally subordinated using a hamburger icon in the header and text links in the footer.



AXURE PROTOTYPE:  
INFORMATION  
ARCHITECTURE



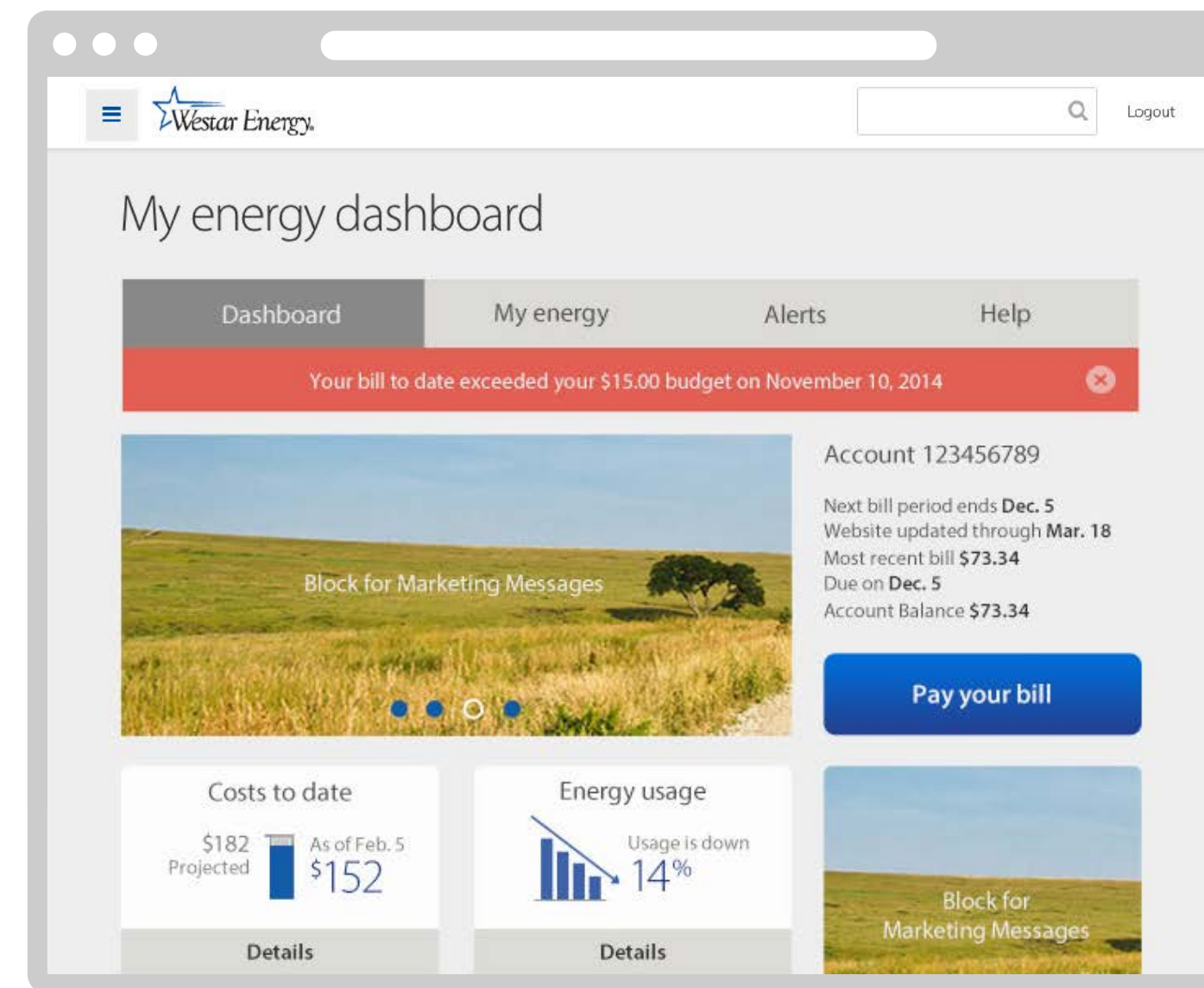
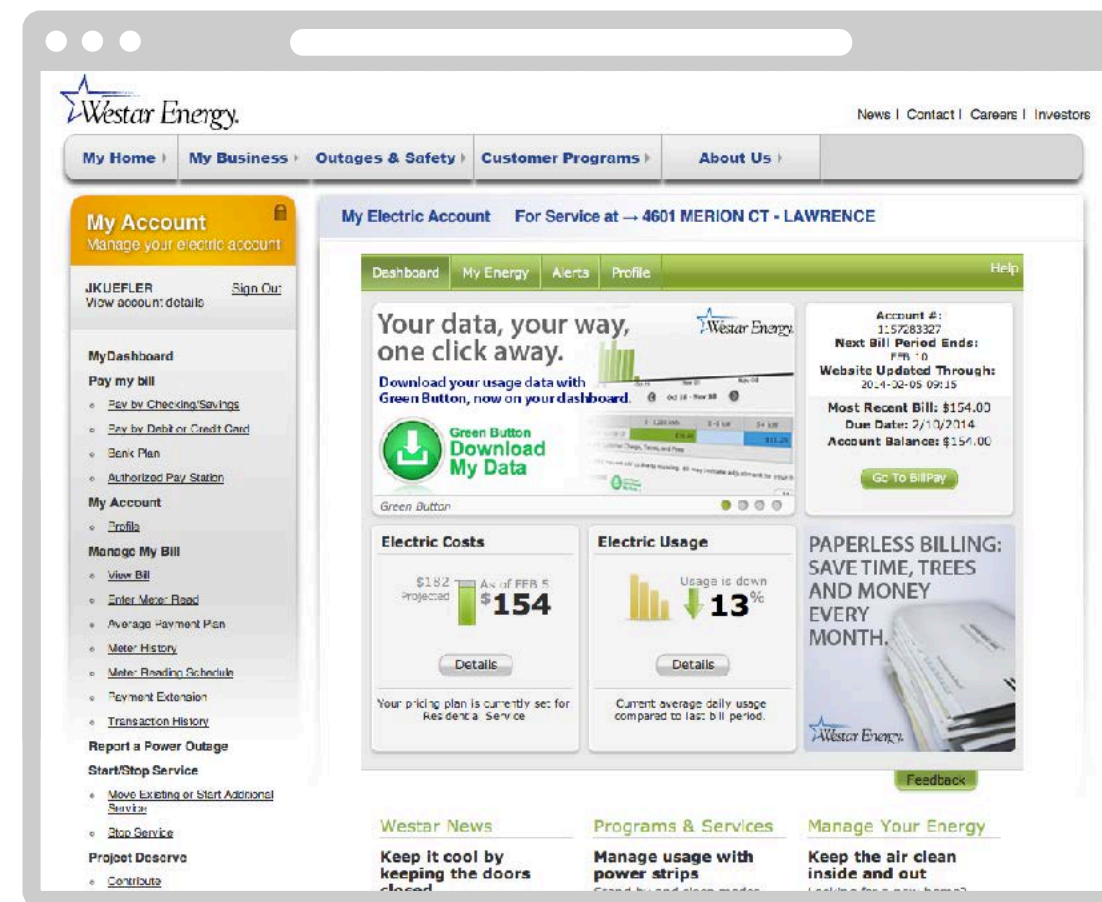
<b>My account</b> My account home View and pay my bill Stop service Move existing service More...	<b>Services</b> Start new service Create an online account Deposit information Commercial and industrial services More...	<b>Outages</b> Report an outage online Outage map Preparing for outages Report a street light out More...	<b>Helpful resources</b> Electric vehicles – getting started Energy efficiency videos Peregrine falcons ReliabilTree More...
<b>Community programs</b> Green Team Kanza Education and Science Park Project DESERVE Scholarship opportunities More...	<b>About us</b> Westar at a glance Our history News releases Investors More...	<b>Careers</b> View and apply for jobs Employee testing Compensation and benefits Working at Westar videos More...	<b>Contact</b> Contact details Online contact form Social media





## UI AND CONTENT DESIGN

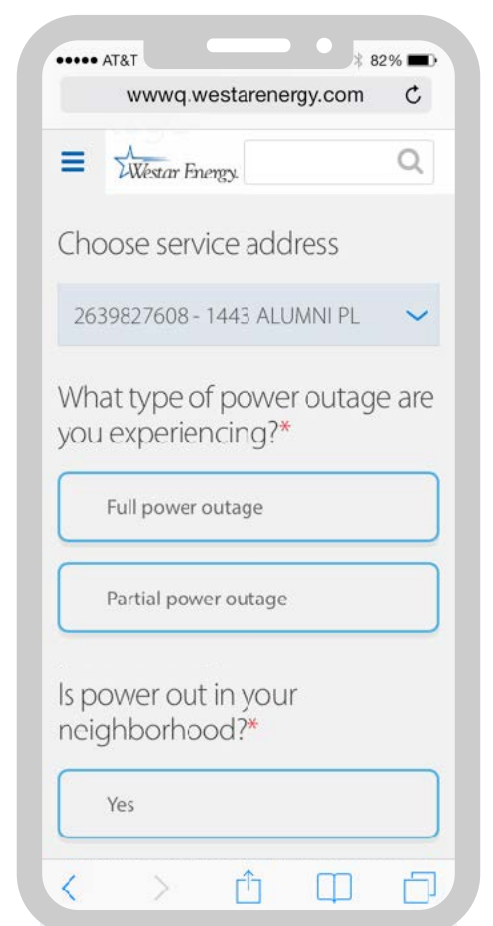
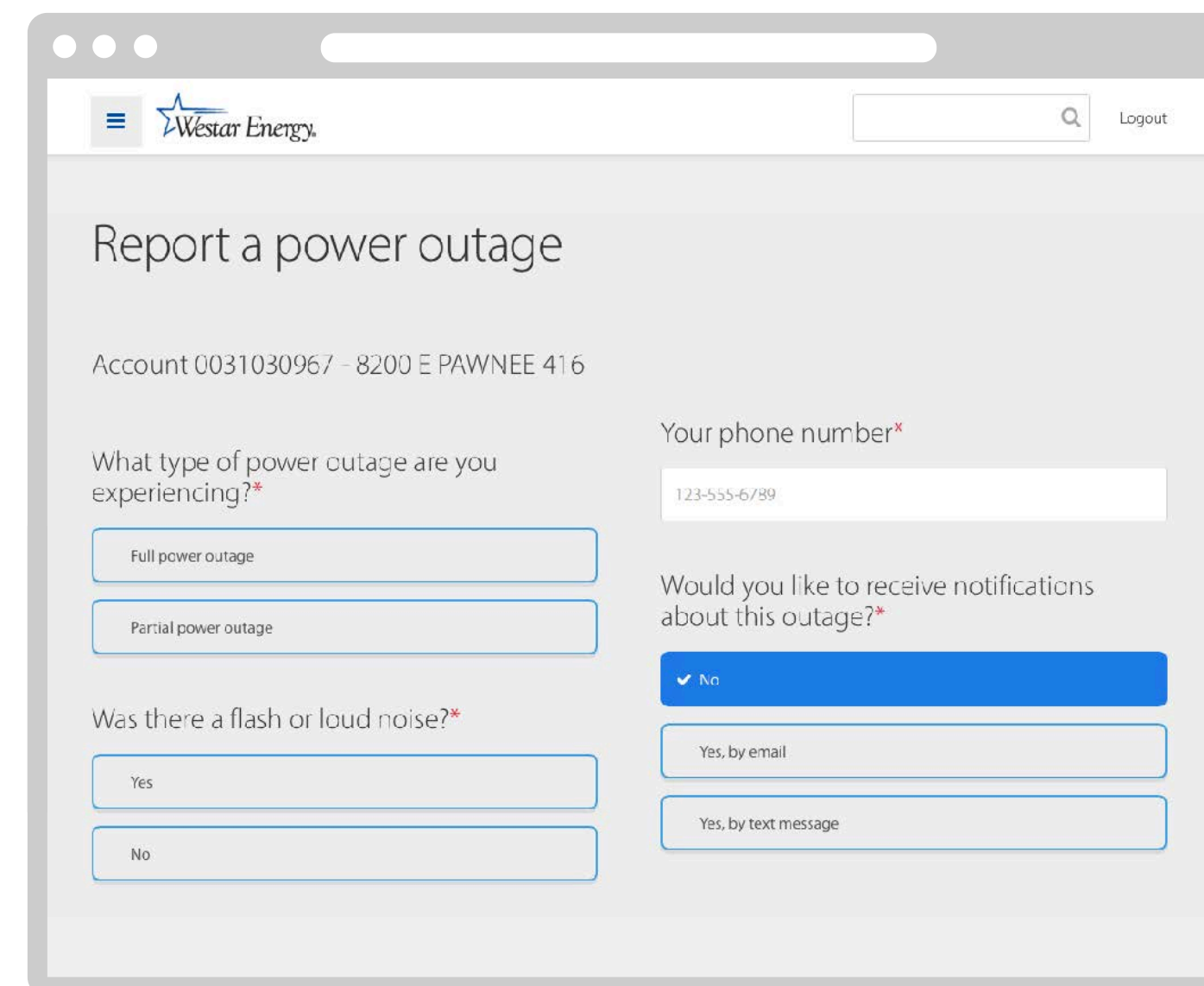
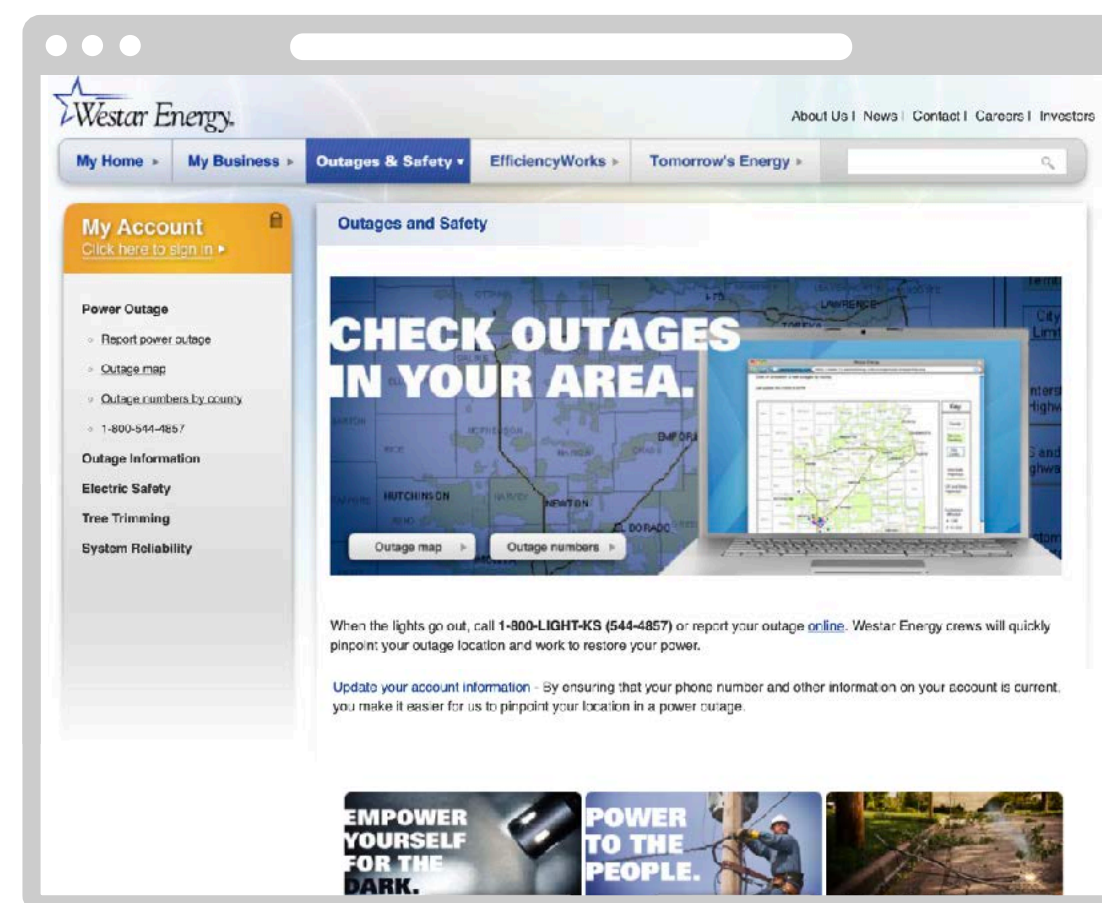
- ▶ Every aspect of the user interface and content was redesigned to declutter, simplify and focus on what the user is trying to accomplish.
- ▶ The new site is completely responsive, functioning equally well on phone, tablet or desktop.
- ▶ Third-party components (the bill paying system, outage maps, customer energy dashboards, etc.) were integrated gracefully and reskinned to match the new visual redesign.



AXURE PROTOTYPE:  
PASSWORD  
RECOVERY



AXURE PROTOTYPE:  
CUSTOMER  
PROFILE







DOCUMENTATION

- Over the course of the project I wrote dozens of requirements documents, business rules and style guides.
- I helped design usability testing which was conducted on key transactional and navigation features. I supervised the testing and wrote summaries of the key findings.

USER TESTING

### USABILITY TESTING EXECUTIVE SUMMARY

CLIENT	Westar
DATE	May 14, 2014
JOB NUMBER	54261
DESCRIPTION	Westar Website Usability Testing

METHODOLOGY

Eleven test participants of various ages, household income, experience with online payments and computer/mobile device skill levels were tested individually in one-on-one sessions. Each was asked to perform a variety of tasks on the new Westar website using a desktop computer for some of the tasks and then switching to a mobile device (iPad or smartphone) for the remainder of the tasks. All participants were current Westar customers. Six participants were "single property payers," and five were "multiple property payers." (Summary of participants appears on page 6.)

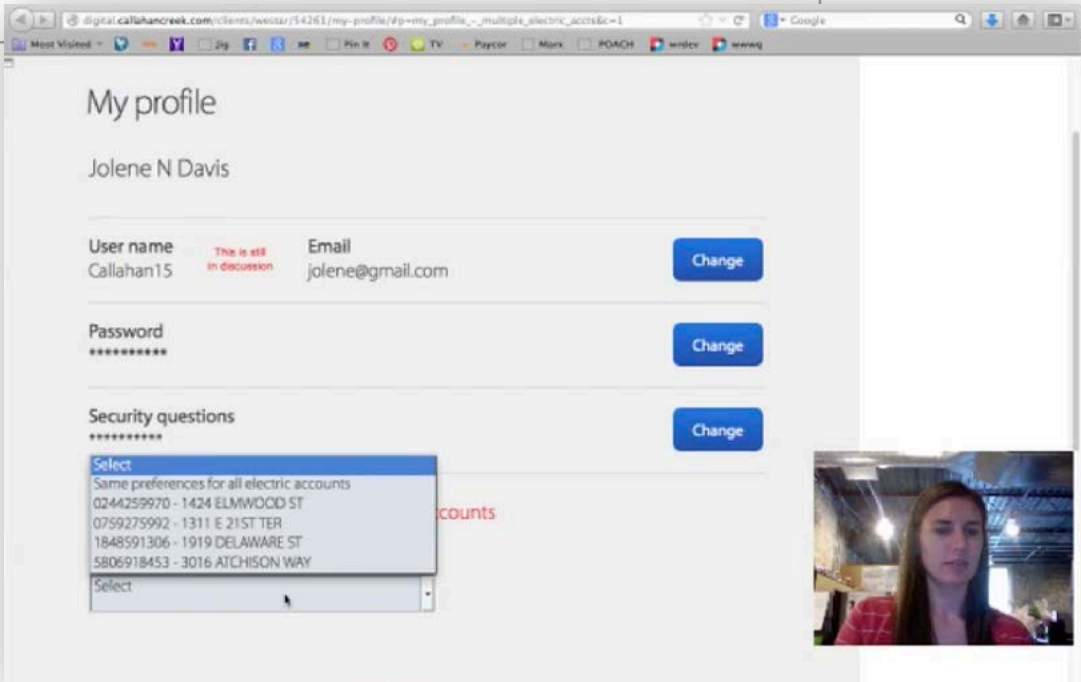
Tasks the participants were asked to perform included:

- Starting/transferring/stopping service
- Signing up for a new online account
- Starting additional service,
- Making online payments
- Signing up for automatic payments/average payment plans
- Finding electricity consumption history
- Research energy saving information
- Finding "Call Before You Dig" information
- Finding outage map and reporting an outage
- Changing account and profile information
- Finding a pay station
- Finding company financial information
- Locating employment information

Many of the tasks were drawn from a JD Powers survey assessing utility company websites.

Participants were also asked to comment on their impression of the site overall, and to compare their experience on the new site with the current Westar site (if they were familiar with the current site.)

Video recordings of all usability tests are available for review if desired.



BUSINESS RULE AND REQUIREMENTS

### Business Rules – Group Bill

5/28/14 - 5/20 updates blue; 5/27 call notes green; 5/29 feedback red; 6/3 clarifications magenta

- We will call the Group Bill "Header" account the "Group Bill Master Account"
- Individual electric accounts that are under a Group Bill can be paid online, in addition to the Group Bill Master Account.
- The table below and the comments on the following pages explain the business rules for Group Bill Accounts for specific pages/features on the website:

A	B Group Bill Master Account (See note on next page)	C Individual Electric Accounts (See note on next page)	D Neither	E Page includes "Choose Service Address" menu (For multi-account Non-Group Bill customers)
View and Pay My Bill	X	X		X
Pay with Checking or Savings	X	X		X
Automatic Bank Payments	X			X
Average Payment Plan			X	X
Payment History (1 - See next page)	X			X
Bill Delivery Options (will move to Profile page)	X			X
Payment Extension/Pay Agreement			X	X
Stop Service		X		X
Start Additional Service	When logged in a user can submit a Start Add'l Service or Transfer Service form. However the new electric account is not added to their Group Bill unless they call Customer Service.			
Transfer Service				X
My Electric Accounts (add/remove account)	Both Group Bill Master Account and Individual Electric Accounts appear on the list – see page 4.			
My Profile	N/A – one profile			

Request f

Enter Me

View Met

View Met

Create ar

page)

Project D

Report ar

### Westar Corporate Website Requirements Acceptance Form

**Purpose:** The Client Acceptance Form signifies sign-off of the requirements and defines the completed functionality for each feature, page or functional performance. This form will be completed prior to the final testing phase for each element.

Feature Name	View and Pay My Bill (includes Get Important Notices and Bill Inserts)
Feature ID Number	T-06 (Quicker #96 and #113)
Approver	Ginger Elser
Project Manager	Francisco Tovar <a href="mailto:Francisco.Tovar@westarenergy.com">Francisco.Tovar@westarenergy.com</a>

### LIST OF ACCEPTANCE CRITERIA (REQUIREMENTS)

Requirements	
<ul style="list-style-type: none"><li>Account login is required.</li><li>There are no data entry fields on this page. The user chooses from various options:<ul style="list-style-type: none"><li>"Pay with bank account" button links to: <a href="http://www.westarenergy.com/Pay-with-Checking-or-Savings">http://www.westarenergy.com/Pay-with-Checking-or-Savings</a></li><li>"Pay with credit/debit card" button links to <a href="https://payments.westar.billmatrix.com">https://payments.westar.billmatrix.com</a> in a new window.</li><li>A menu allows users to select a date to download a PDF of the current or past detailed bills (from XNET). PDFs open in new windows.</li><li>A second menu allows the user to select a date to download current and past Bill attachments (a.k.a Bill Inserts) (from XNET). PDFs open in new windows. If more than one Bill attachment PDF is available for a given date, a new window opens with a list of links to download each PDF.</li><li>A third menu allows the user to select a date to download current and past important notices (from XNET). PDFs open in new windows. If more than one important notice PDF is available for a given date, a new window opens with a list of links to download each PDF.</li><li>Other bill pay options are listed with links to respective pages (phone, in person, automatic bill payments, average payment plan, more).</li></ul></li><li>Customers with current important notices see a yellow band across the top of the page with link(s) to PDF(s) of the notices (from XNET). If there is more than one important notice, each one has its own link. "Current" notices (displayed in yellow band at top and on menu at bottom) are considered anything within the last 75 days. "Past" notices are anything between 76 days old and 24 months old (listed on the menu at the bottom).</li><li>See the attached page layouts for the page content as it applies to each customer type:<ul style="list-style-type: none"><li>Regular customer</li><li>Regular customer with pending payment</li><li>Regular customer on automatic bill payment</li><li>Group Bill customer – Group Bill Master Account selected</li><li>Group Bill customer – individual Electric Account selected</li></ul></li></ul>	

STYLE GUIDE

Pay My Bill Report an Outage Start or Stop Service Services

HOME LEARNING CENTER NOTICES ABOUT US BUSINESS JUNE 1

## We need your help in stopping copper theft

**A WESTAR ENERGY EMPLOYEE** Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.

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When appropriate, define the "type" text. In most cases, this should just be a few words.

Place inline images to the right, center or left of content. Margins and wrapping will be applied automatically. Do not apply any additional styling to images. Consider cropping images such that the height is a minimum of 100px and increases by 30px increments.

100px  
130px  
160px  
190px

100px  
130px  
160px  
190px

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The standard content area is exactly 600px wide and 300px high.

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*This is really about trying to stop outages before they happen.*

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Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.

Heading	Heading
1 mA or less	Slight tingling sensation.
This is some cell data.	Extreme pain, respiratory arrest, individuals can not let go, death is possible.

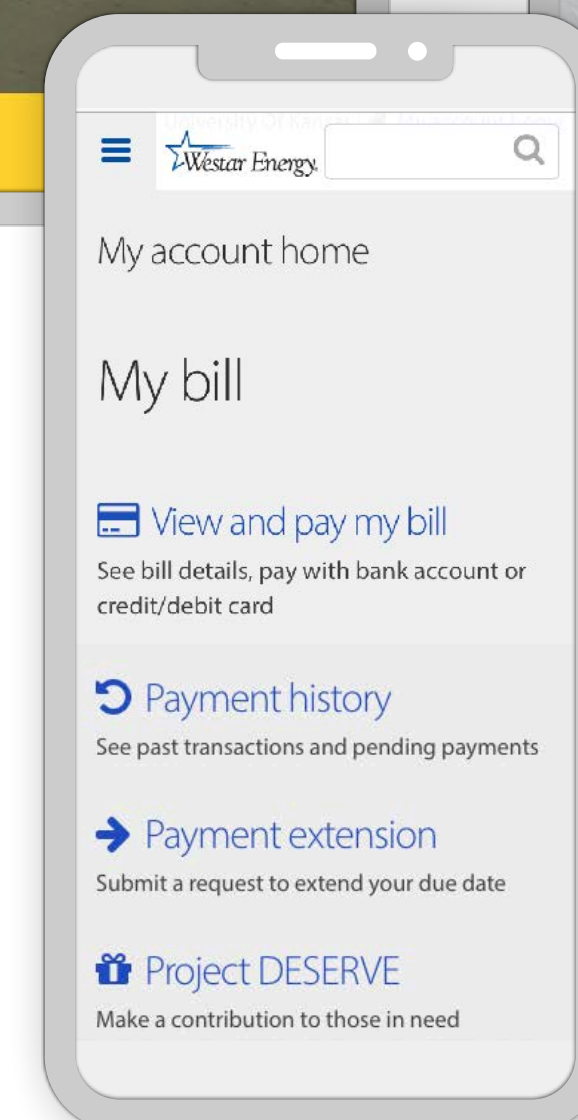
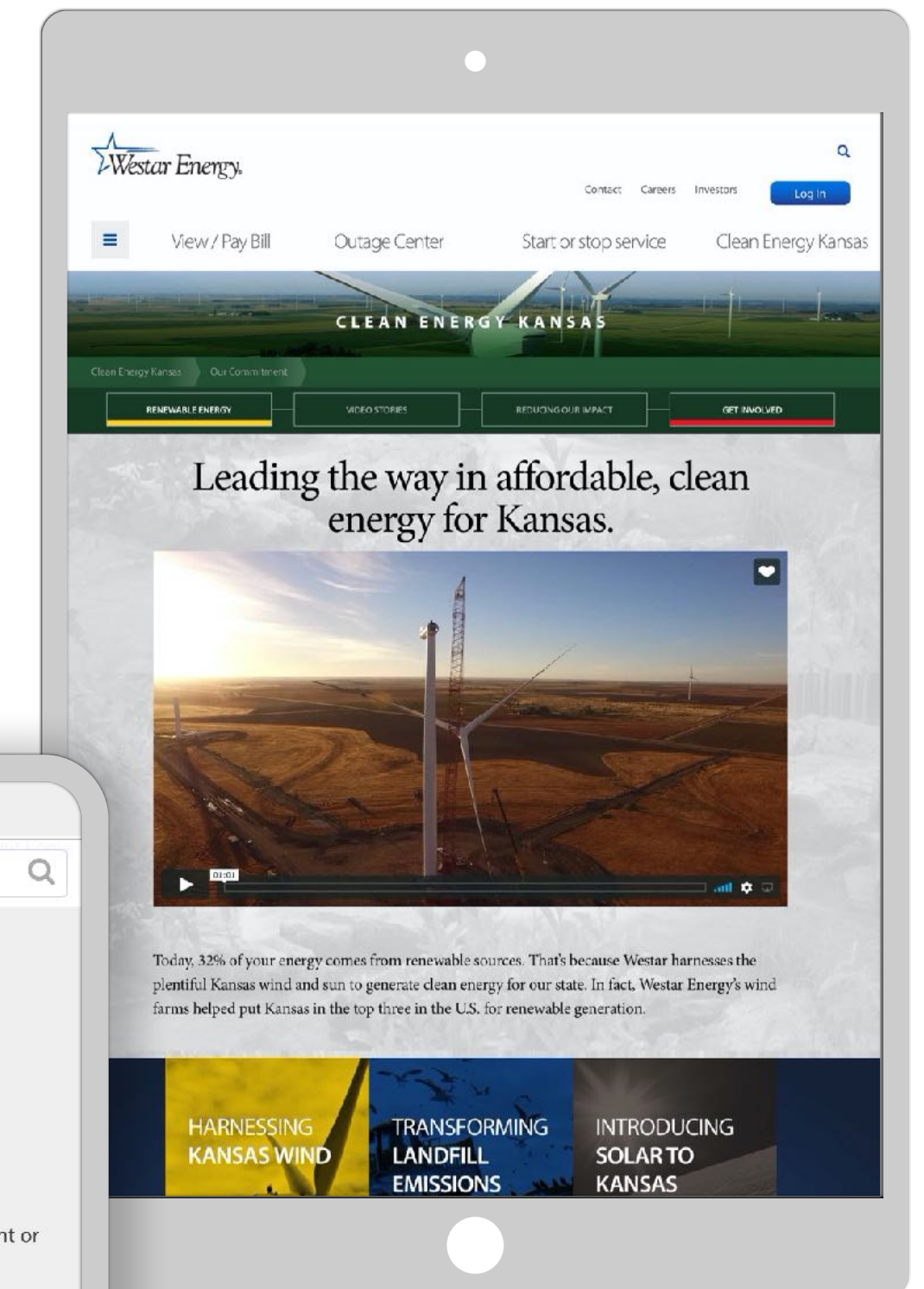
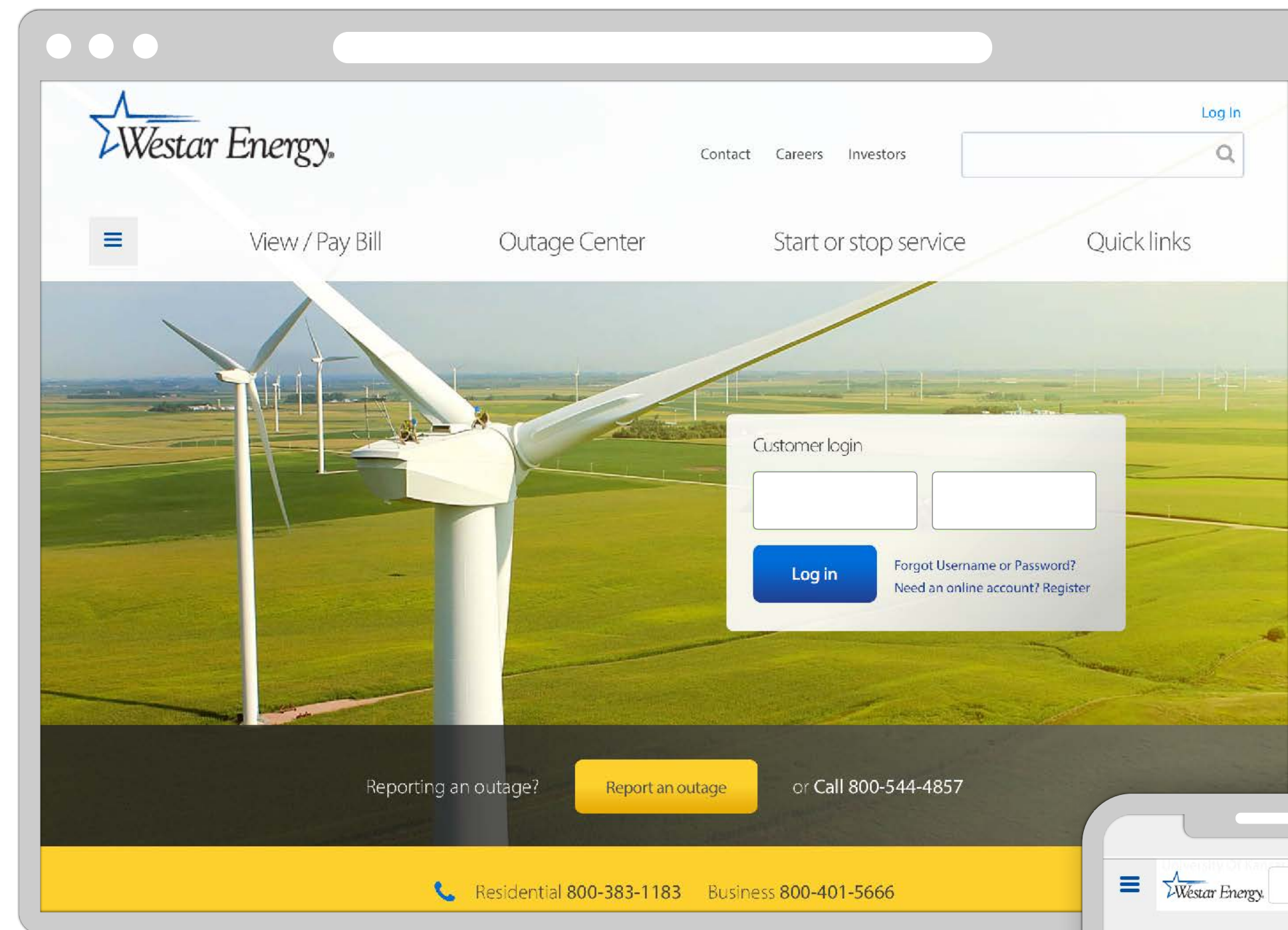
Table will default to standard cells. Define table headings only. Labels will automatically apply wrapping.





## RECOGNITION

- ▶ The new site received praise from internal audiences and most importantly from customers.
- ▶ J.D. Power & Associates ranked the site in the top three of 66 U.S. utility websites evaluated.



"J.D. Power & Associates rated our website in the top three of 66 utility websites, performing particularly well in overall ease of use."

**Michel' Cole** | Westar VP Corporate Communications



## CHALLENGE

The creators of Greenies™ dental dog treats developed a new brand with even more advanced dental health benefits: Yummy Combs.™ They needed to quickly launch a site that immediately established a strong national brand image. This, despite the lack of the full product line that was not yet available at the time of the site launch.

## SOLUTION

I developed an information architecture that allowed the company to easily add products to its brand portfolio over time without changing the site organization. The scope of this project was small allowing me to accomplish the required tasks quickly.

## MY ROLE

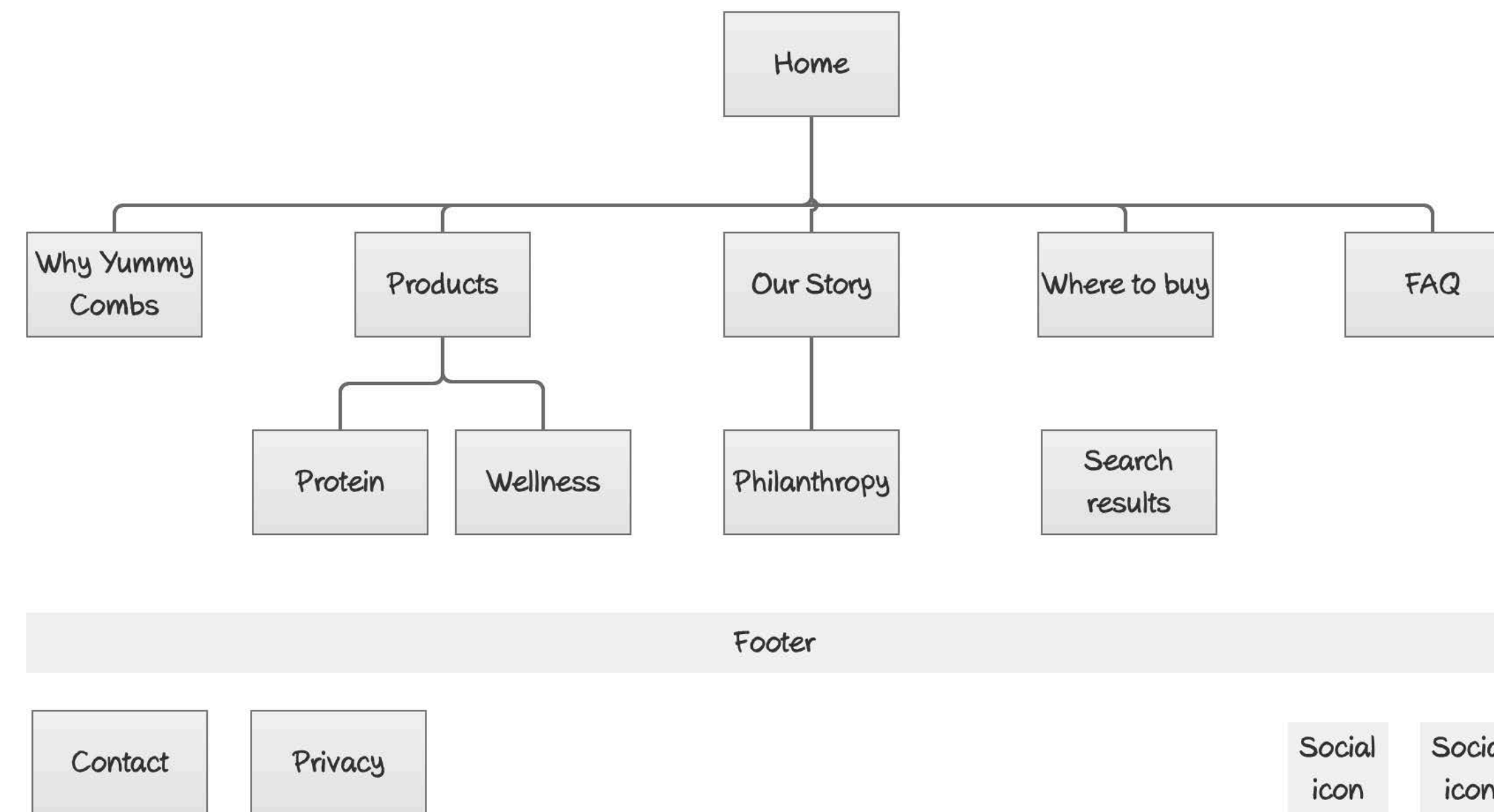
- ▶ Information architecture
- ▶ UX design
- ▶ Wireframe prototype





## INFORMATION ARCHITECTURE

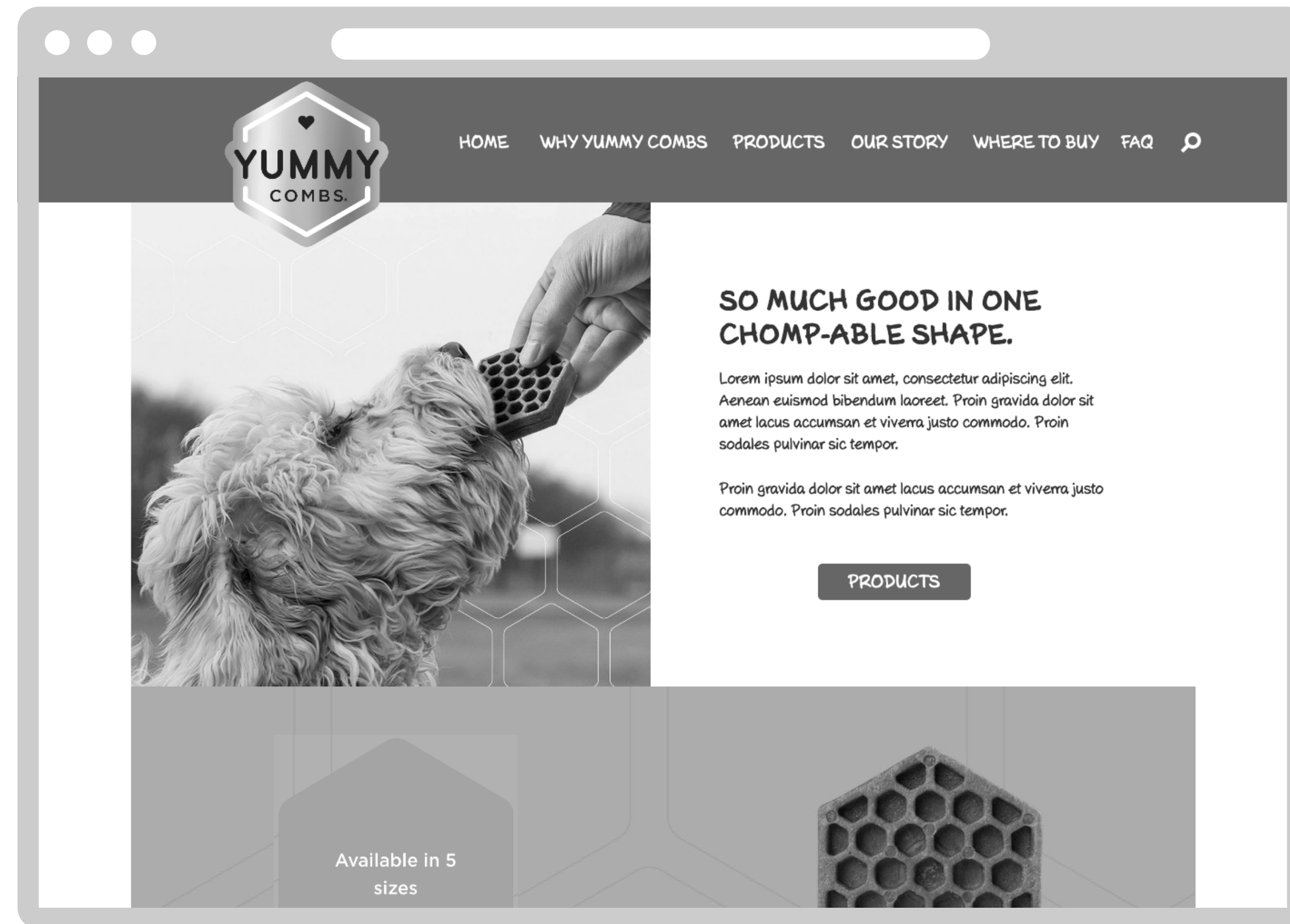
- After a brief discovery session with the client team and review of similar websites in the category as well as my previous experience with similar sites, I was able to sketch out the site map in short order.
- I typically avoid presenting site maps and user flows to clients in favor of showing interactive wireframes or high-fidelity prototypes, which are more easily understood because they mimic the experience in the browser.



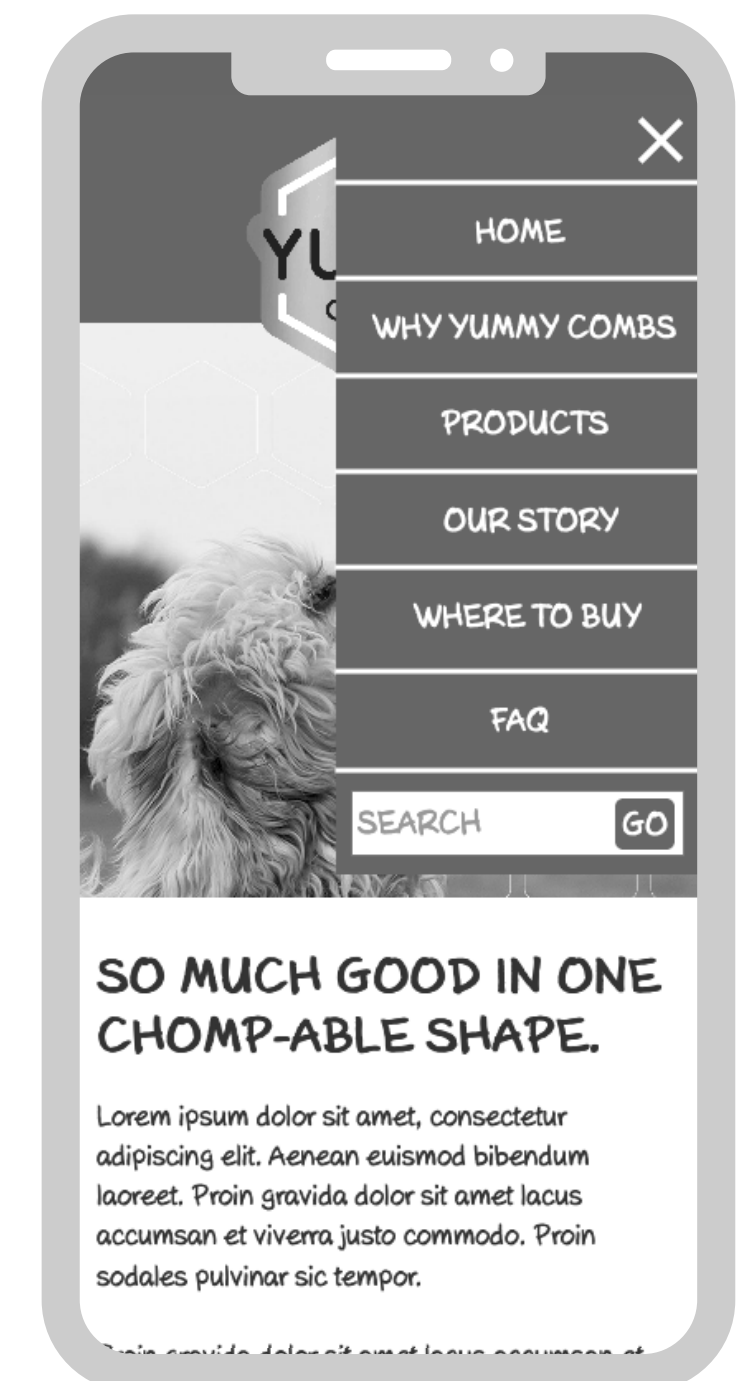


## WIREFRAMES

- ▶ Based on the approved site map I quickly created an interactive wireframe prototype of the full site.
- ▶ I picked up elements that had been developed for the new brand (logo, pet photography, product shots and packaging images).
- ▶ The wireframe is adaptive and includes desktop and mobile views to guide the graphic design team through all the required elements.



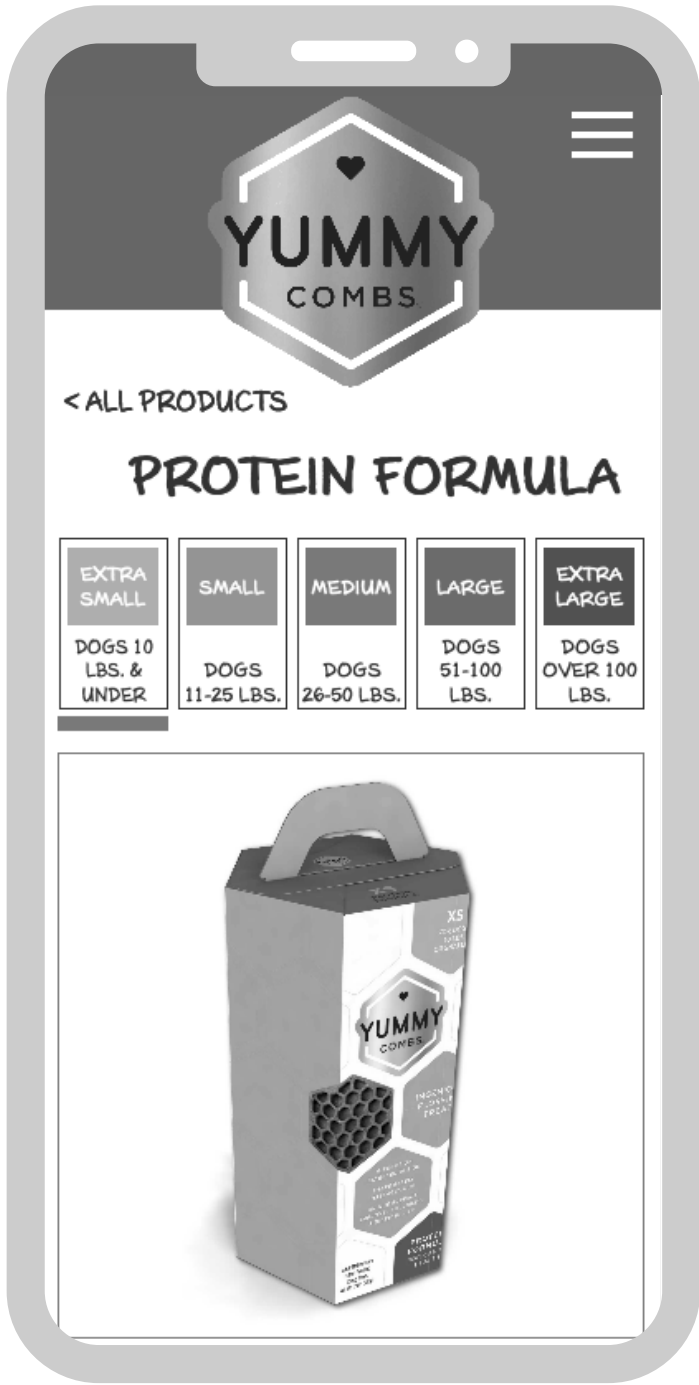
RESPONSIVE  
AXURE PROTOTYPE:  
YUMMY COMBS  
WEBSITE





FEATURES

- On the product detail pages, when users select the desired variety, the images and text refresh accordingly.

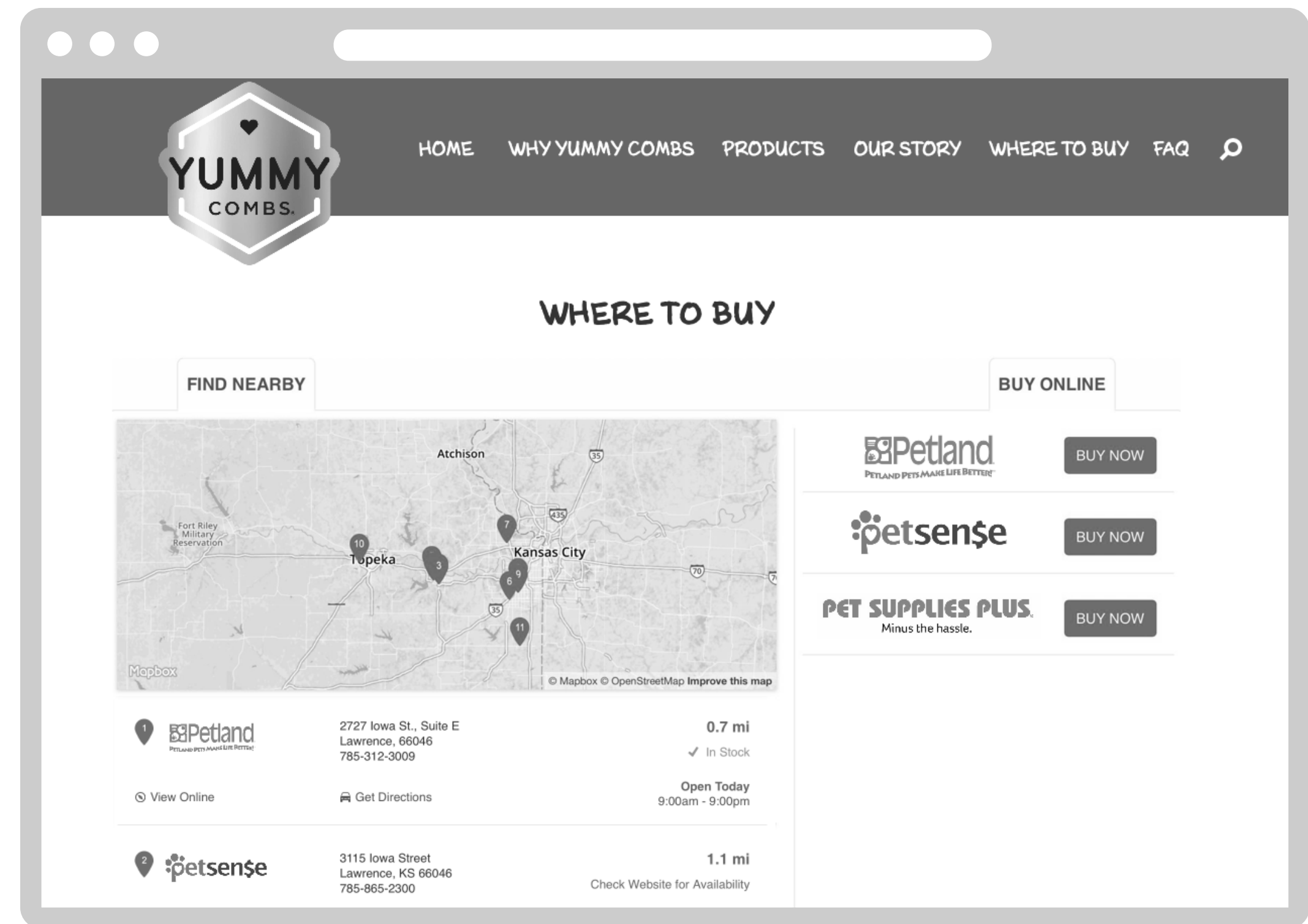
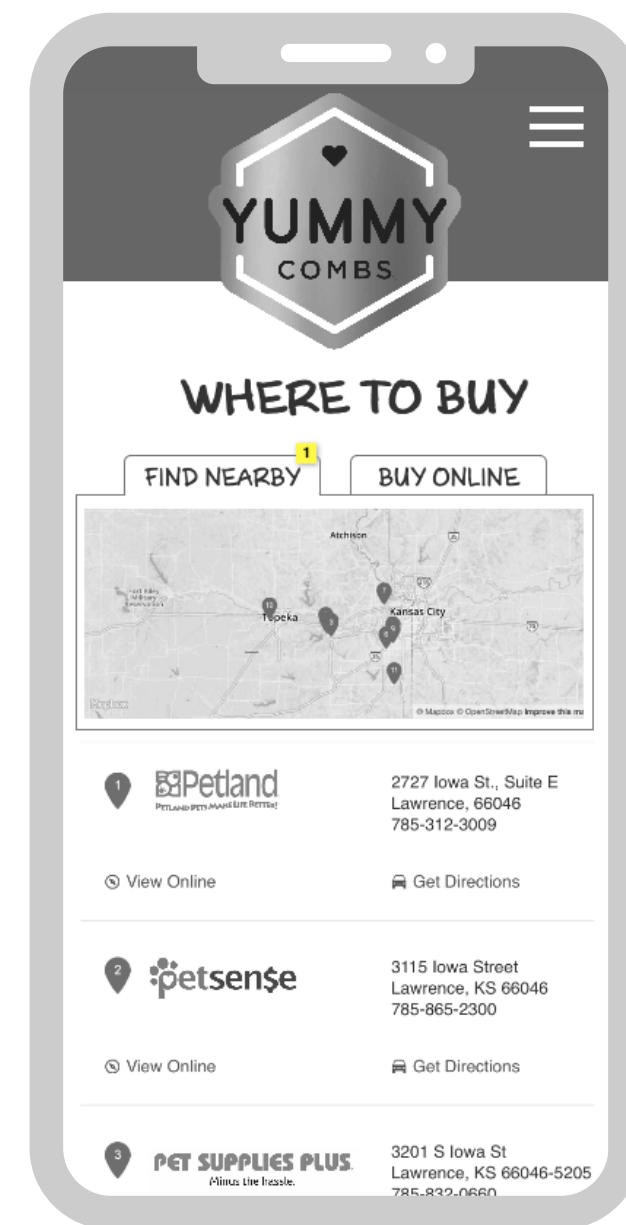




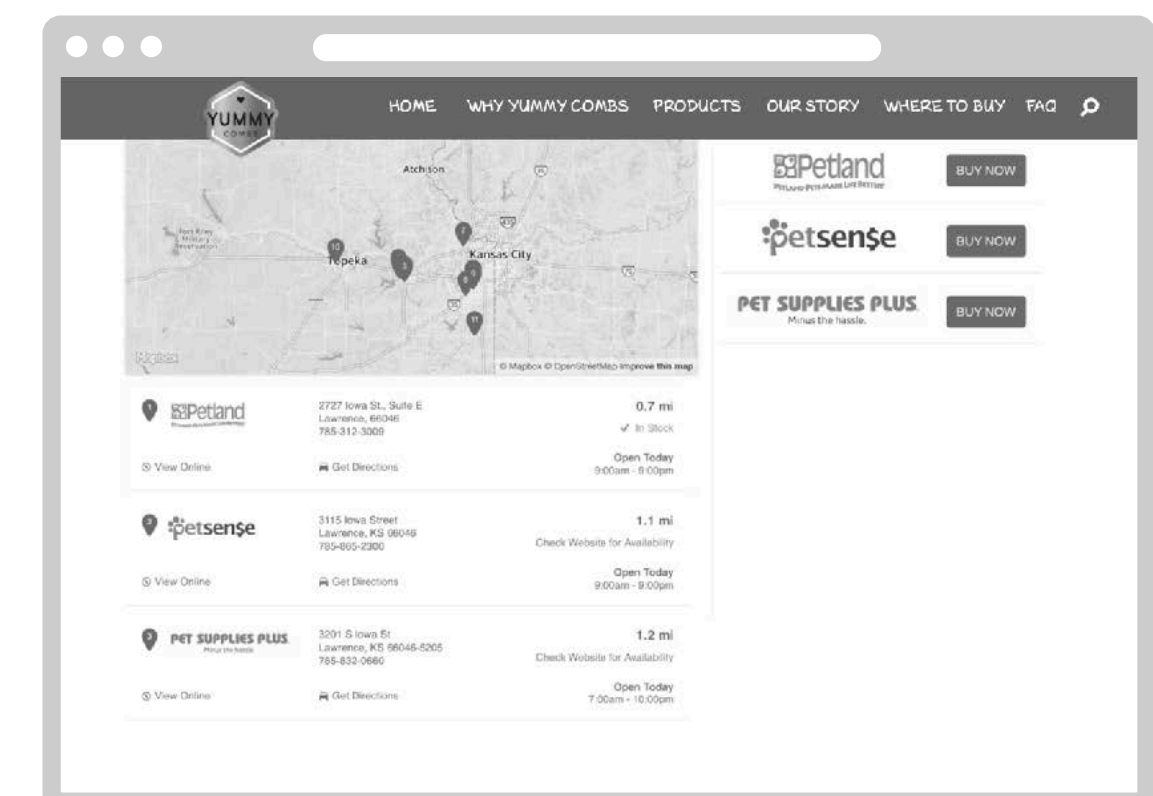


## FEATURES

- ▶ The client planned to integrate the site with their distributor's database to provide a store locator based on available inventory.
- ▶ I created a mockup based on similar solutions I had used on other sites.
- ▶ The wireframe includes an illustration of how desktop and mobile headers minimize on scroll.



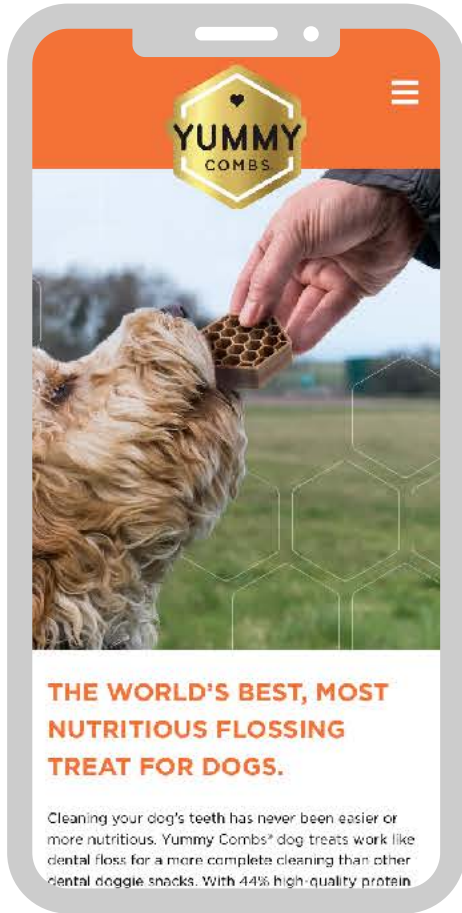
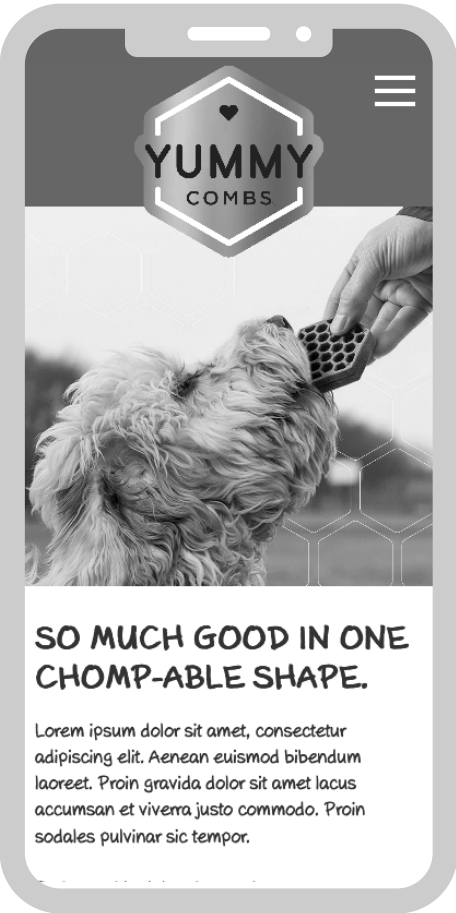
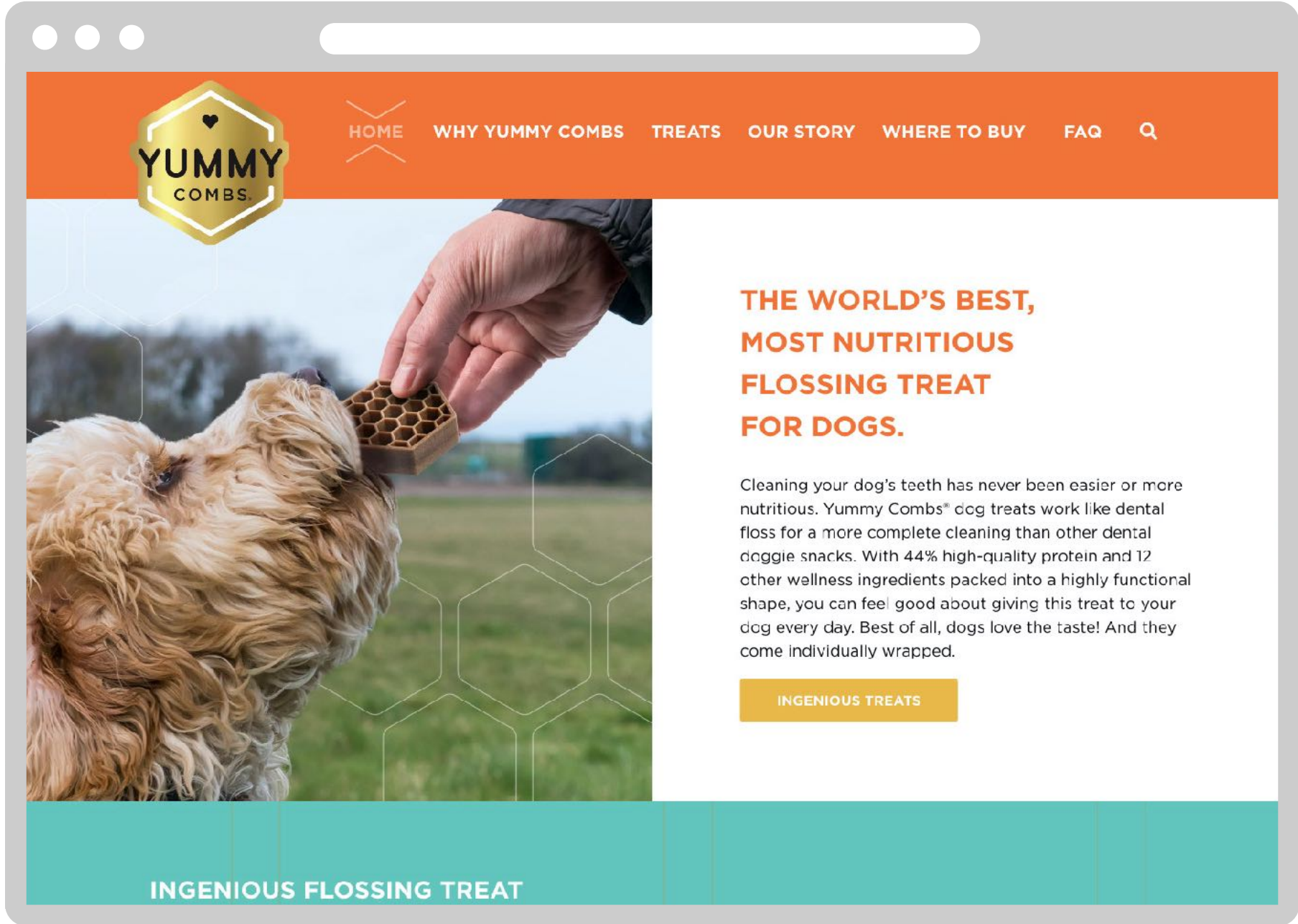
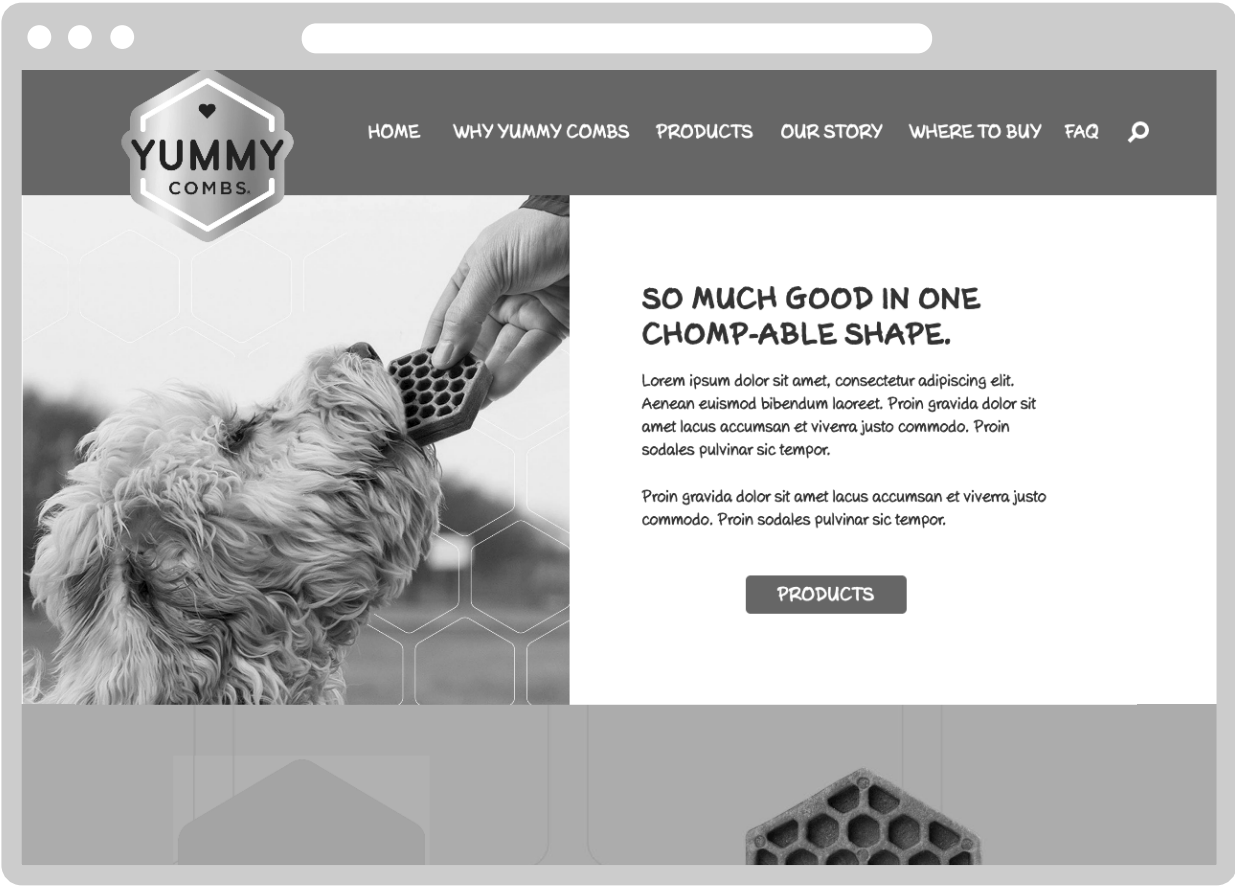
DESKTOP AND MOBILE HEADERS MINIMIZE ON SCROLL ▶





THE FINISHED SITE

► The graphic designer followed the wireframe very closely yielding a beautiful finished product.



LIVE WEBSITE







## CHALLENGE

A few years ago, the Tyson™ Nudges® brand dog treats website was not yet mobile optimized. A redesign was planned but was projected to be a 9-12 month process. A temporary solution was needed to fill the gap until a new responsive site was developed.

## SOLUTION

I recommended using some relatively minor CSS and html code changes to adapt the existing non-responsive desktop site to create a stop-gap mobile version. I was able to quickly create an interactive wireframe to show how we could utilize the desktop site elements and reconfigure them for mobile.

## MY ROLE

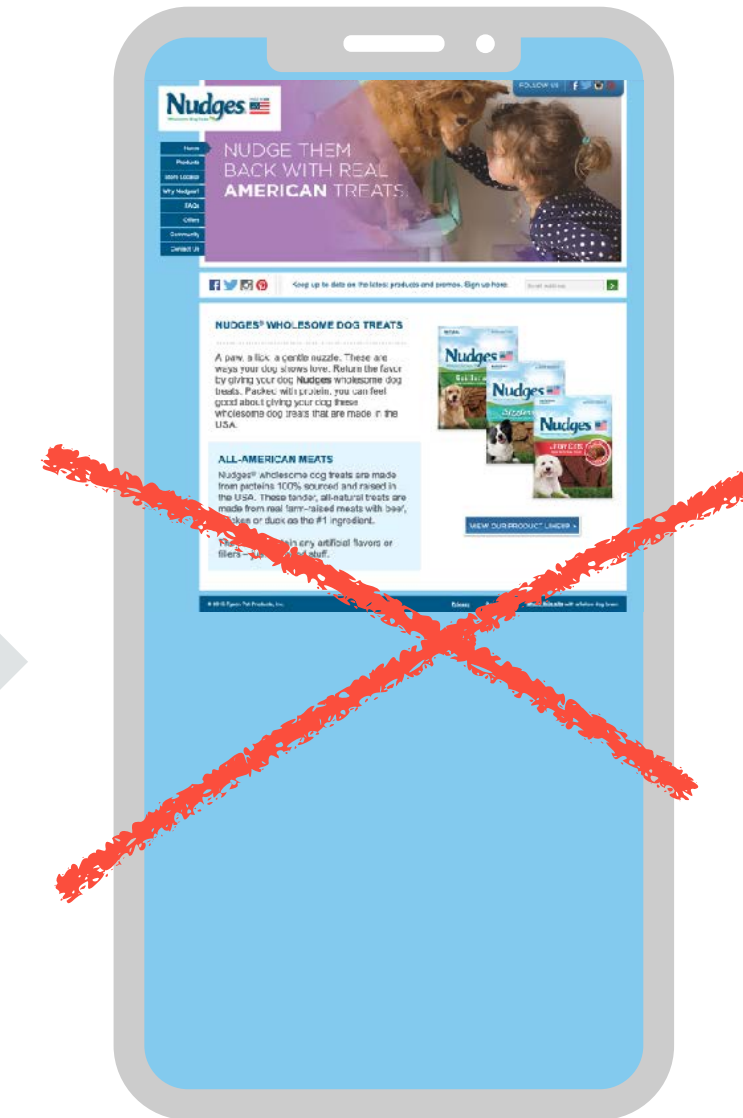
- ▶ UX/UI design
- ▶ Wireframe prototype
- ▶ Development oversight

## PROBLEM/SOLUTION

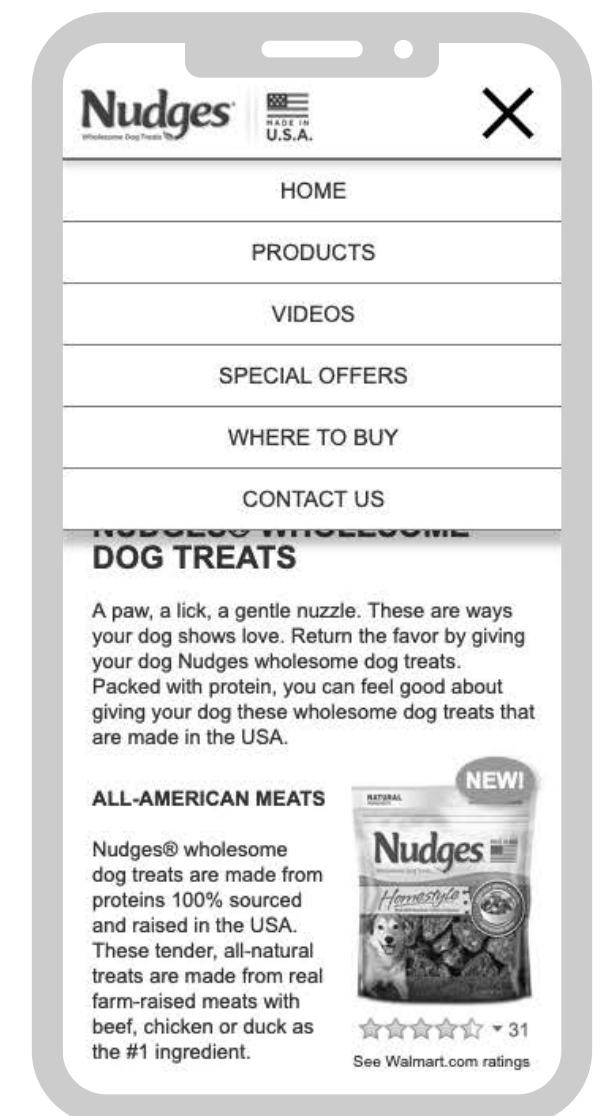
- ▶ Most website owners recognized the importance of mobile optimization long ago, but there are still a surprising number of latecomers.
- ▶ I used elements from the static desktop site to quickly create a mobile wireframe prototype.



PROBLEM



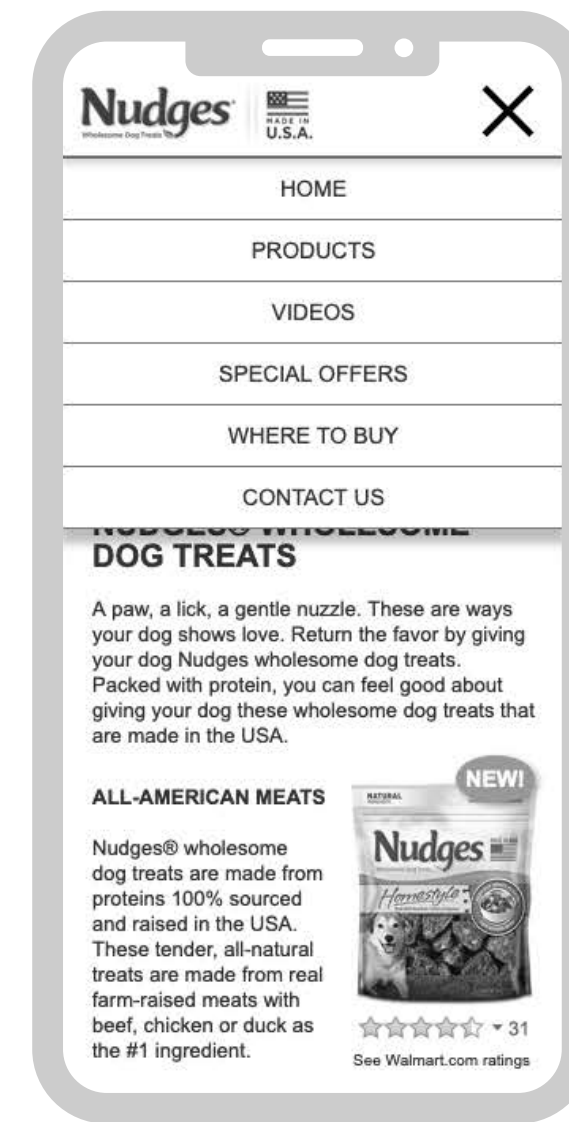
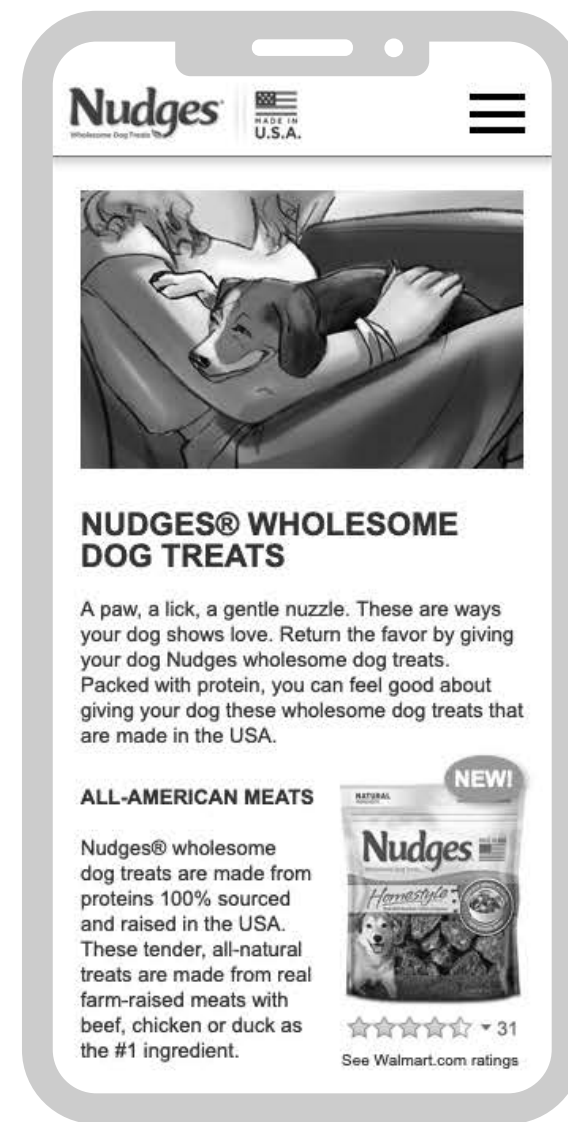
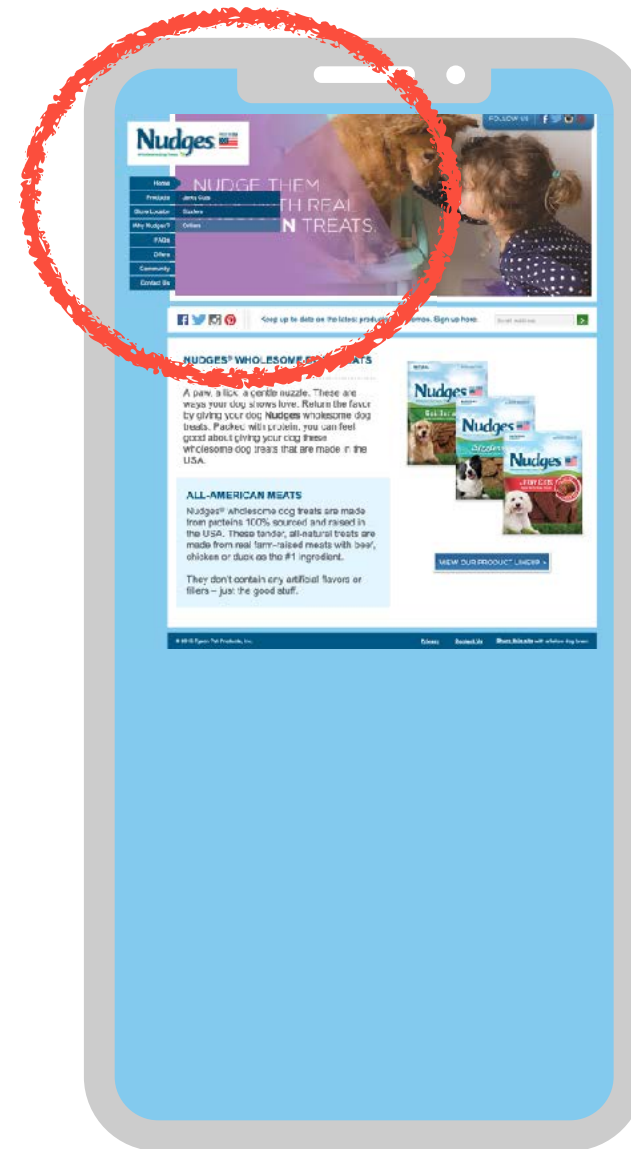
SOLUTION



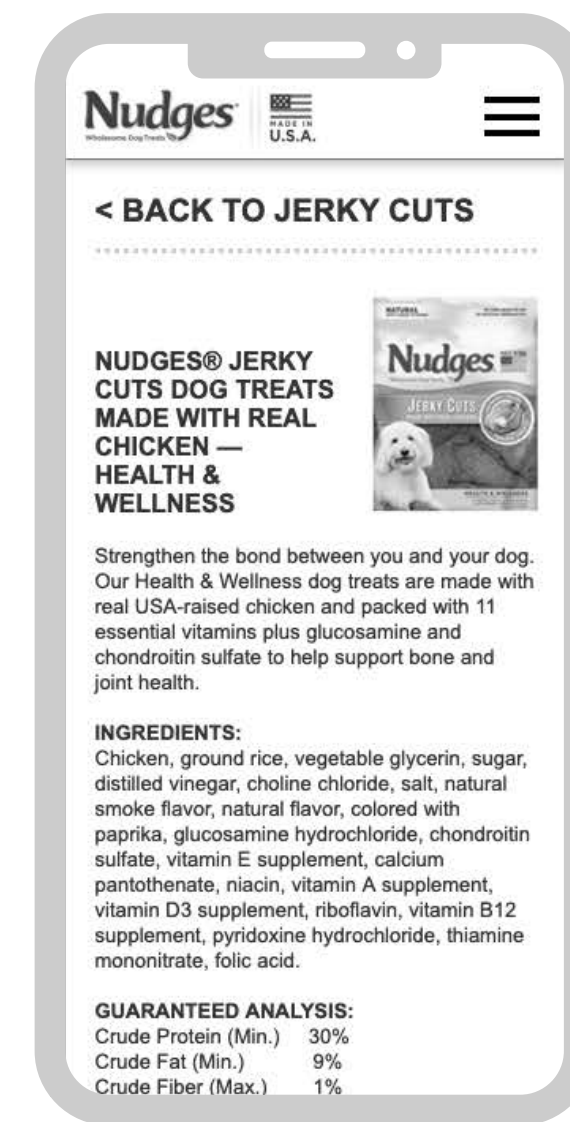
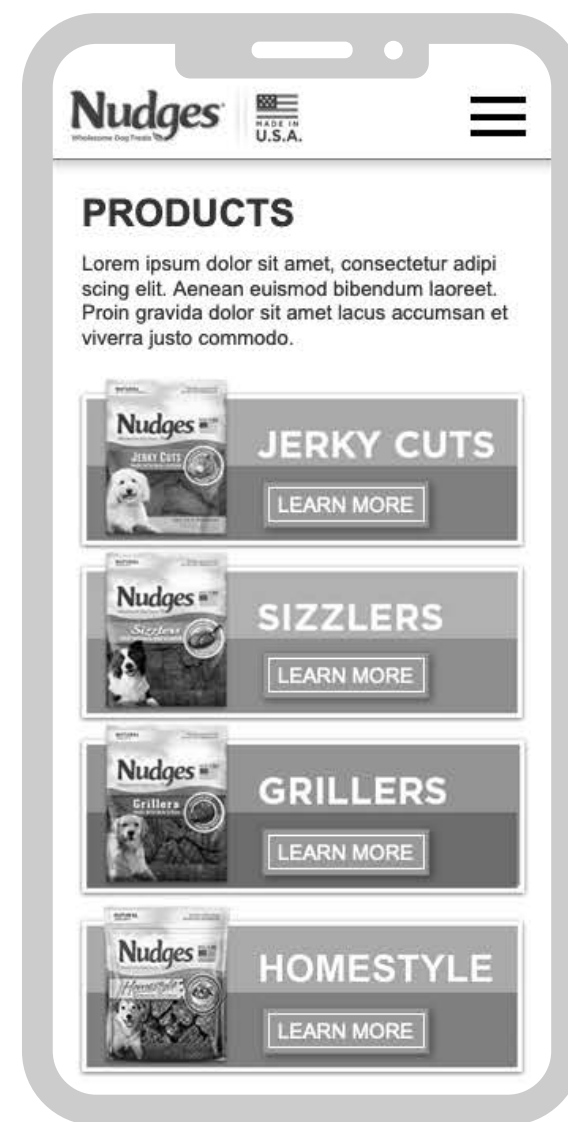
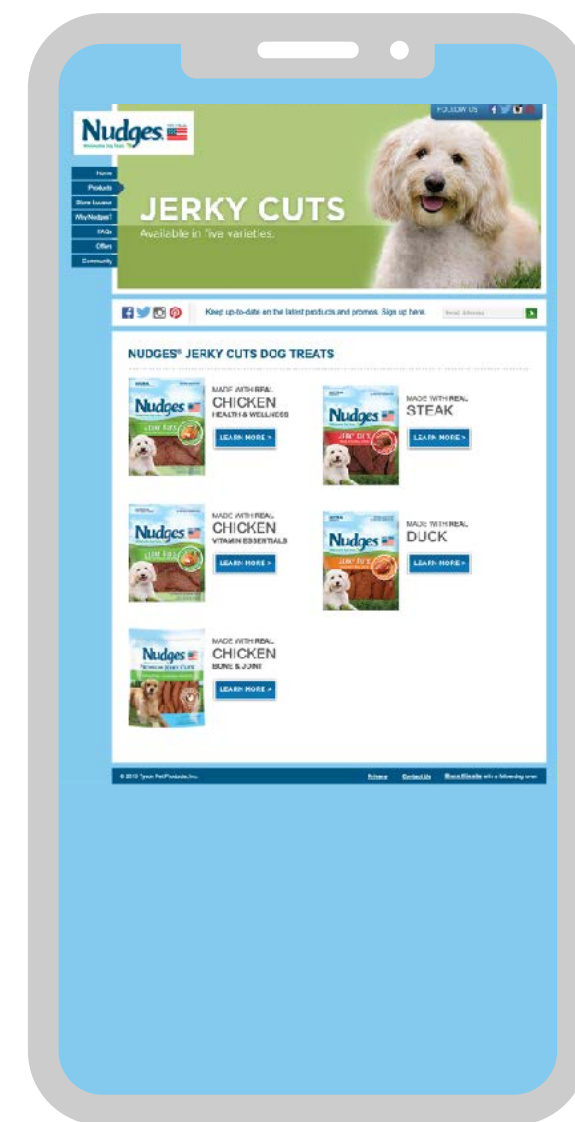


## FEATURES

- ▶ Desktop navigation was replaced with an expandable hamburger menu.
- ▶ The prototype was provided to the developers as a simple guide to reconfigure the desktop elements to a mobile-friendly version.



WIREFRAME  
PROTOTYPE





**Simplicity Center™**

## **CHALLENGE**

Senior citizens are too often the target of online scams. Some older adults fall victim to online predators because they are not aware of the risks. Sometimes that's due to a lack of tech savvy which can be exacerbated if they suffer from dementia. Stories like that were the inspiration for this app.

## **SOLUTION**

I conceived and design an iPad app to help make the internet simple and safe for seniors with dementia or other age-related challenges. It combines four key computer features in a single app that can be locked down by an administrator to safeguard users.

## **MY ROLE**

- ▶ App concept
- ▶ Branding
- ▶ Project management
- ▶ UX/UI design
- ▶ Technical development oversight
- ▶ User training guides and videos
- ▶ Website design and development
- ▶ Marketing and social media



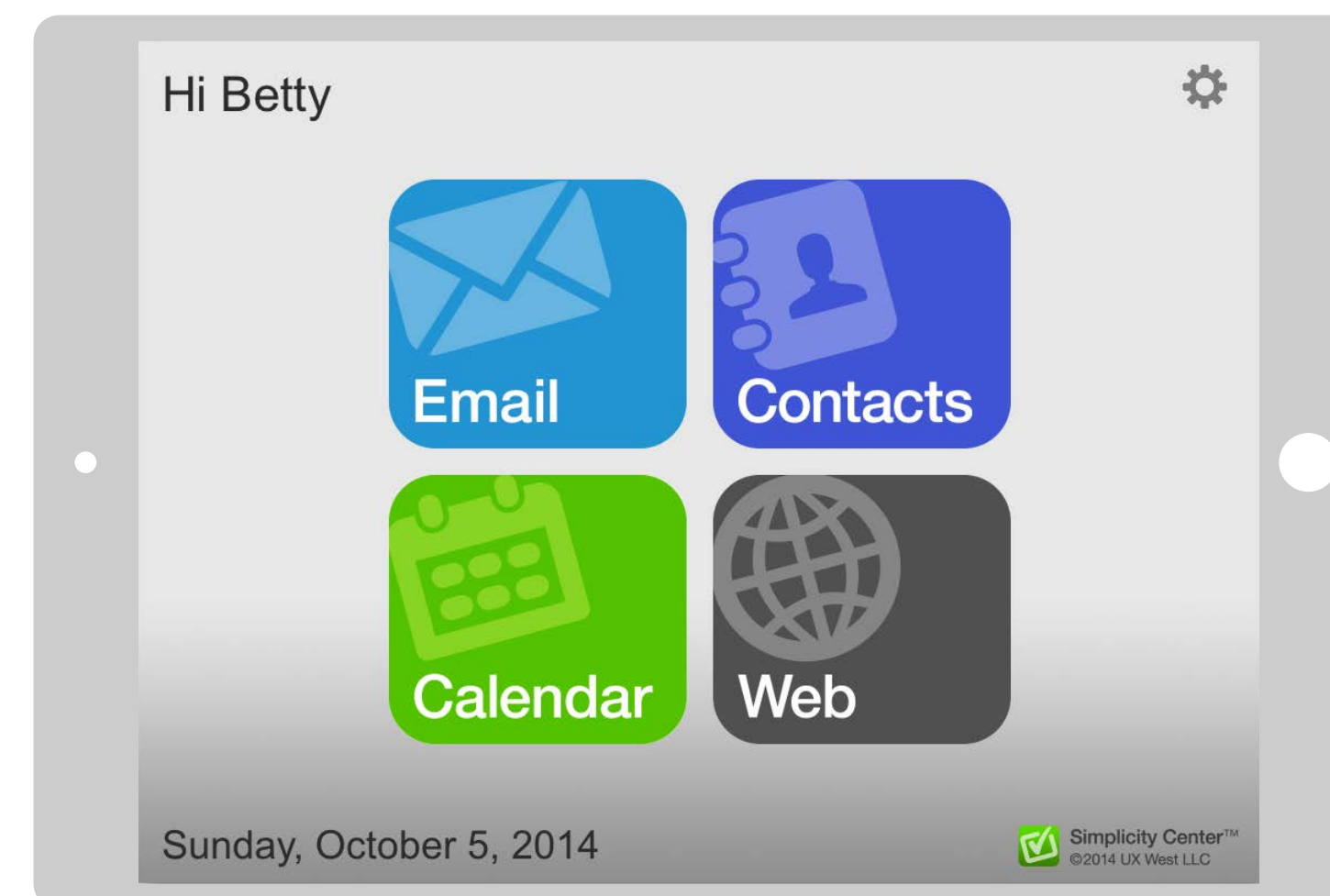


## Simplicity Center™

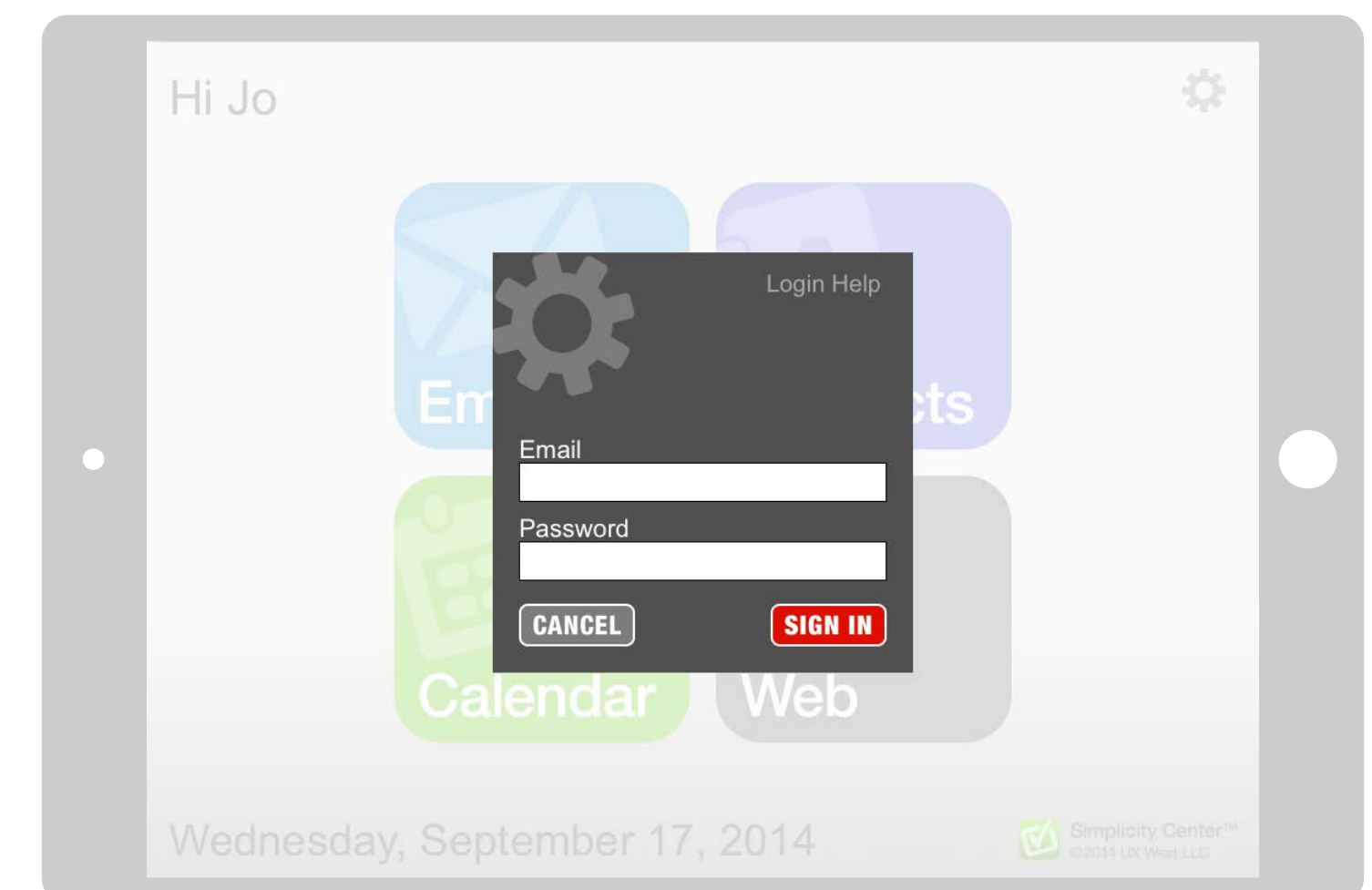
### FEATURES

- ▶ The concept of the app is to limit the user's access to unapproved websites and to protect them from spam and malicious email from unknown sources.
- ▶ It's similar to technologies that restrict children's access to unapproved content, only applied to seniors in need of care due to dementia or other age-related concerns.
- ▶ A loved one or caregiver acts as the administrator and configures the app settings to meet the needs of the user.

▼ DESIGNED FOR SENIORS WITH DEMENTIA



▼ A LOVED ONE OR CAREGIVER IS THE ADMIN





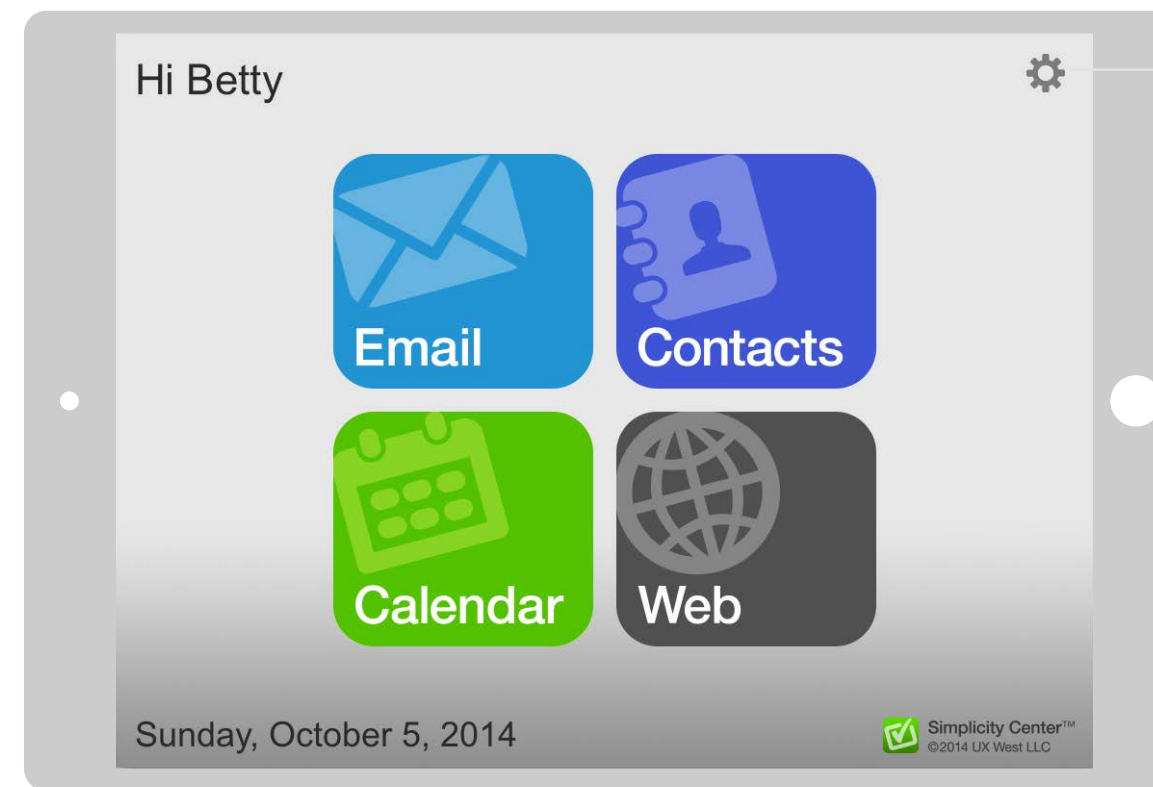


# Simplicity Center™

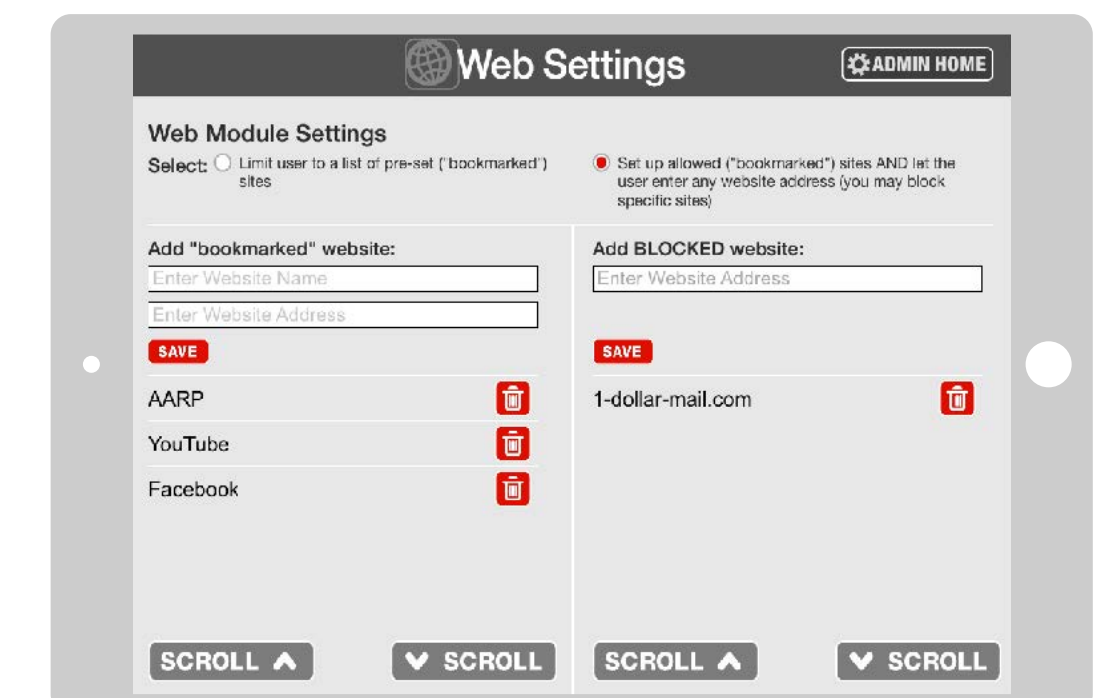
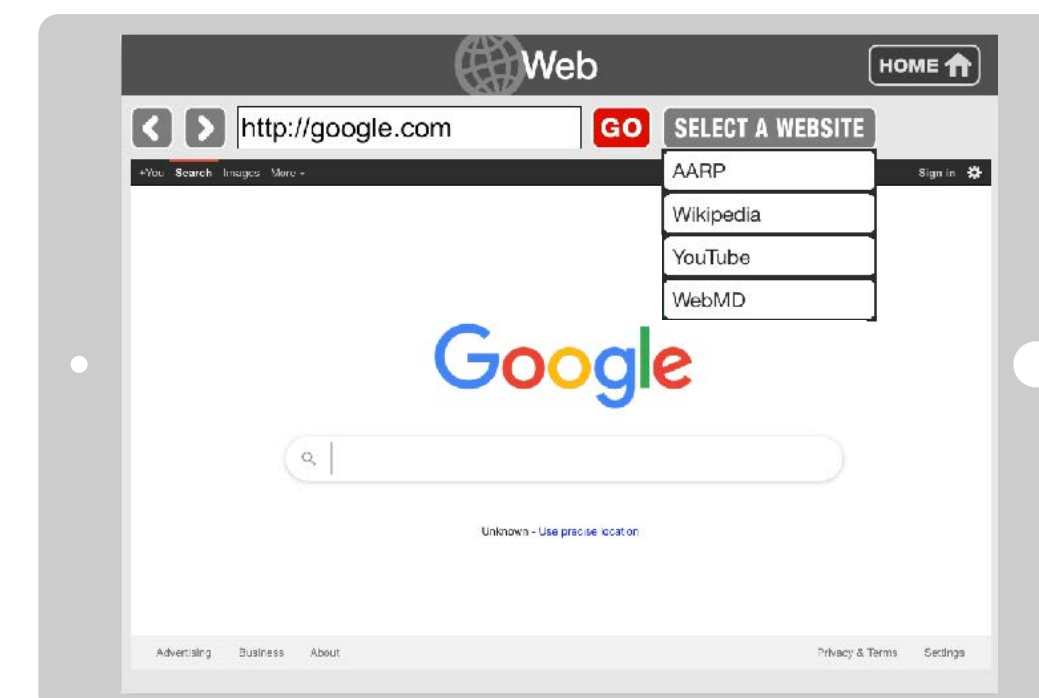
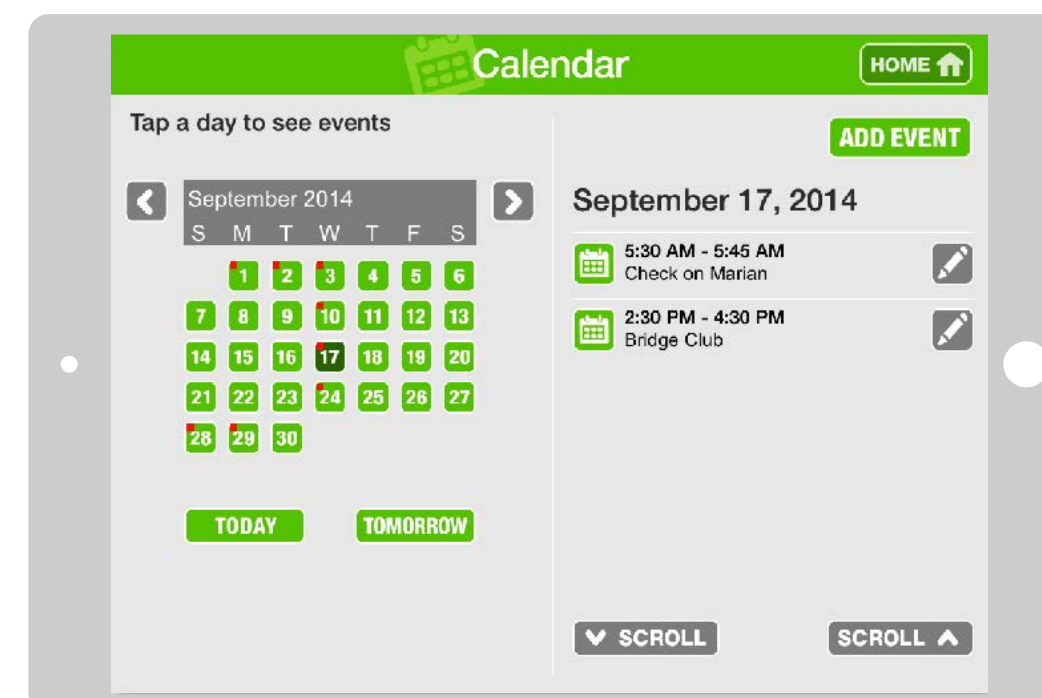
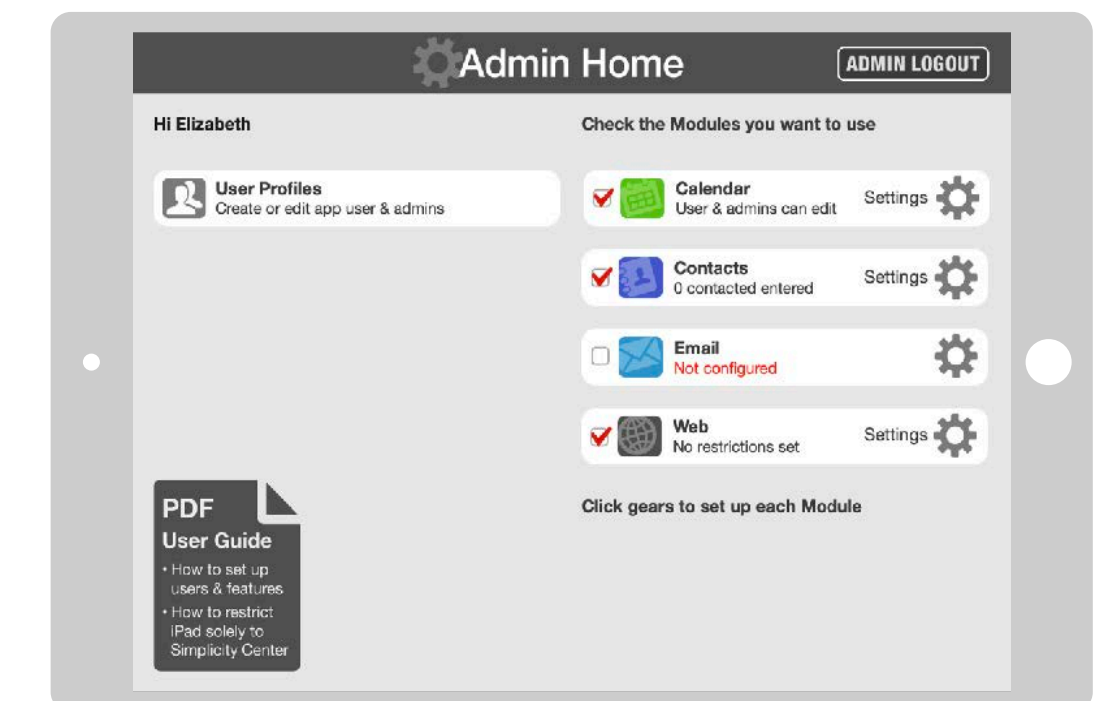
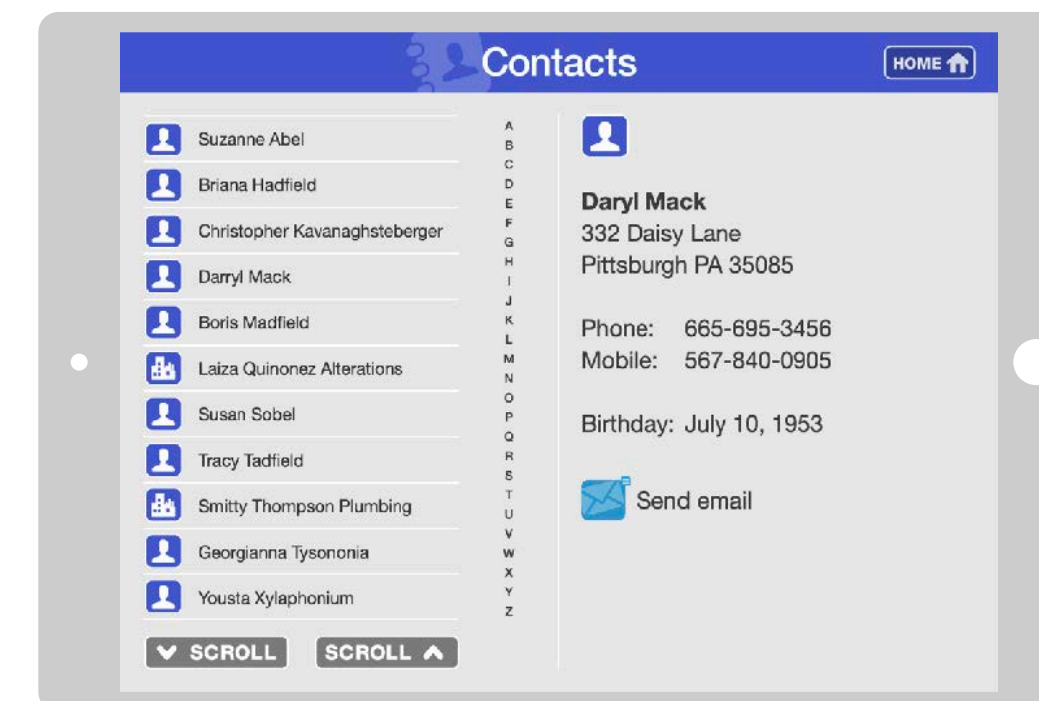
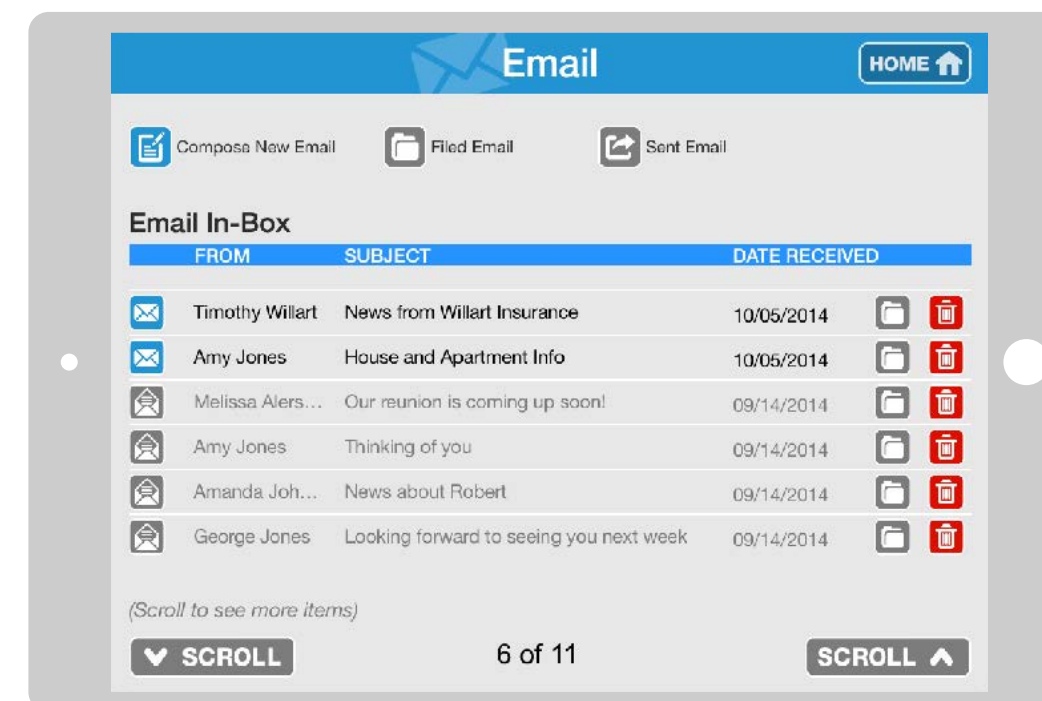
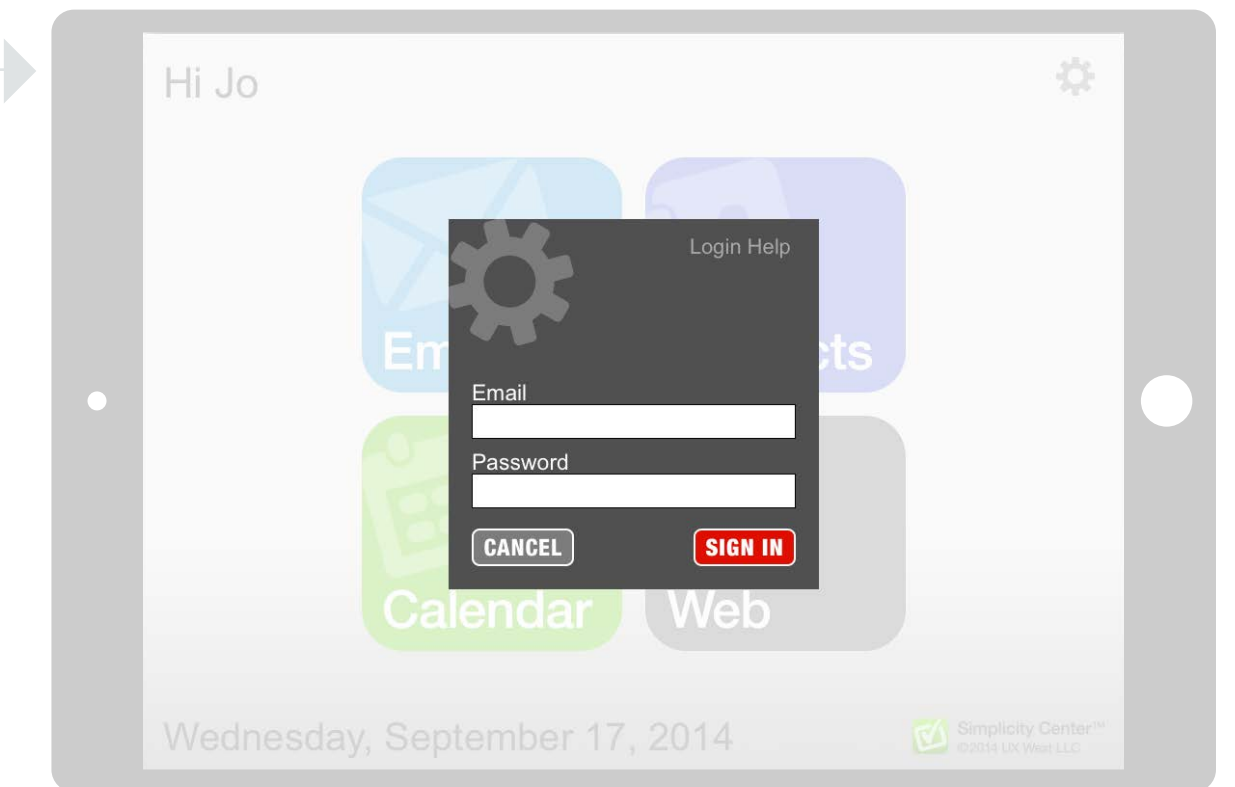
## FEATURES

- ▶ The app combines an email client, a calendar, an address book and a web browser all in one simple UI.
- ▶ Each module is set up and controlled by the administrator (the user's caregiver) and is customized to the user's ability level and needs.
- ▶ The administrator can limit the user's iPad to the Simplicity Center app alone using a built-in iOS accessibility feature (Guided Access).

▼ APP USER VIEW



▼ APP ADMIN VIEW



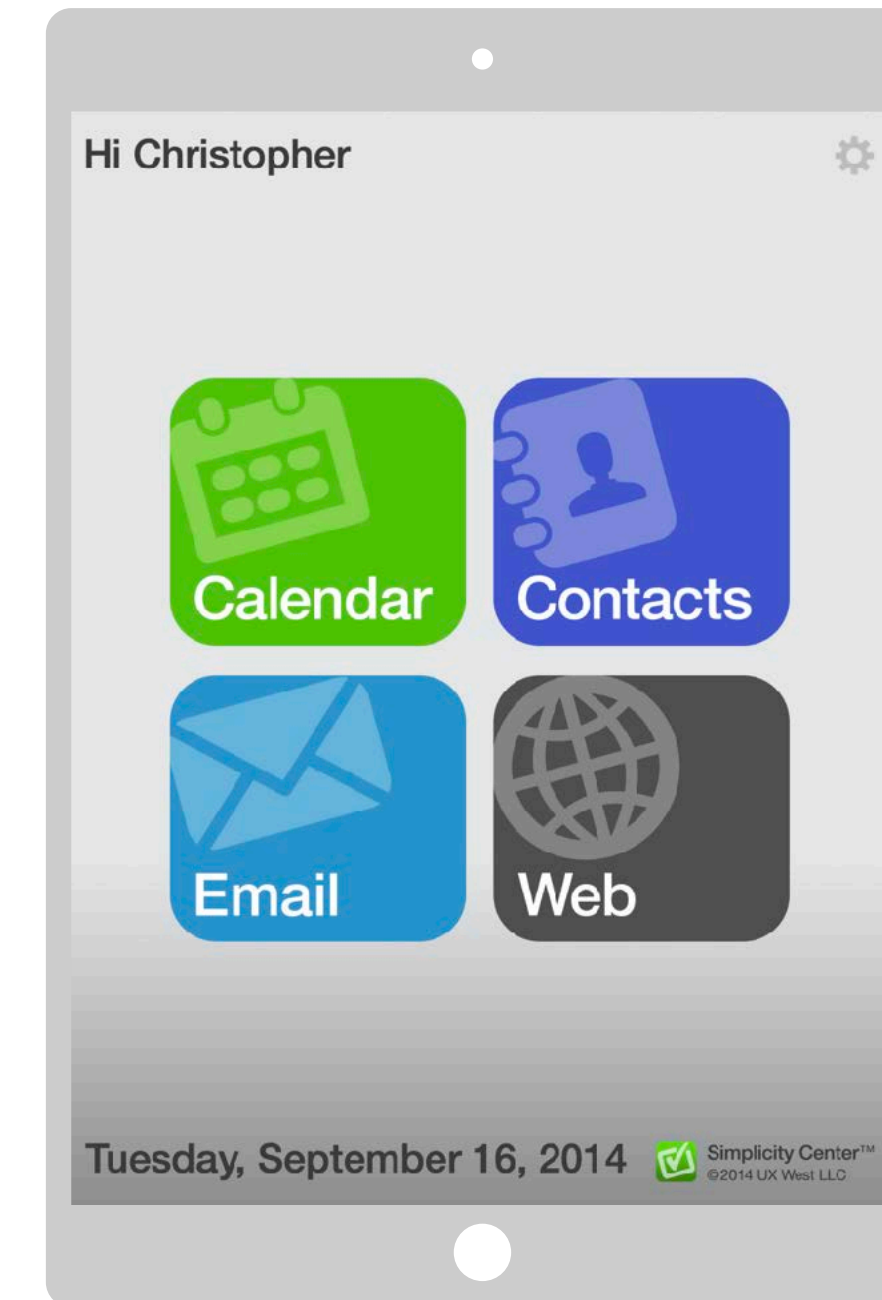
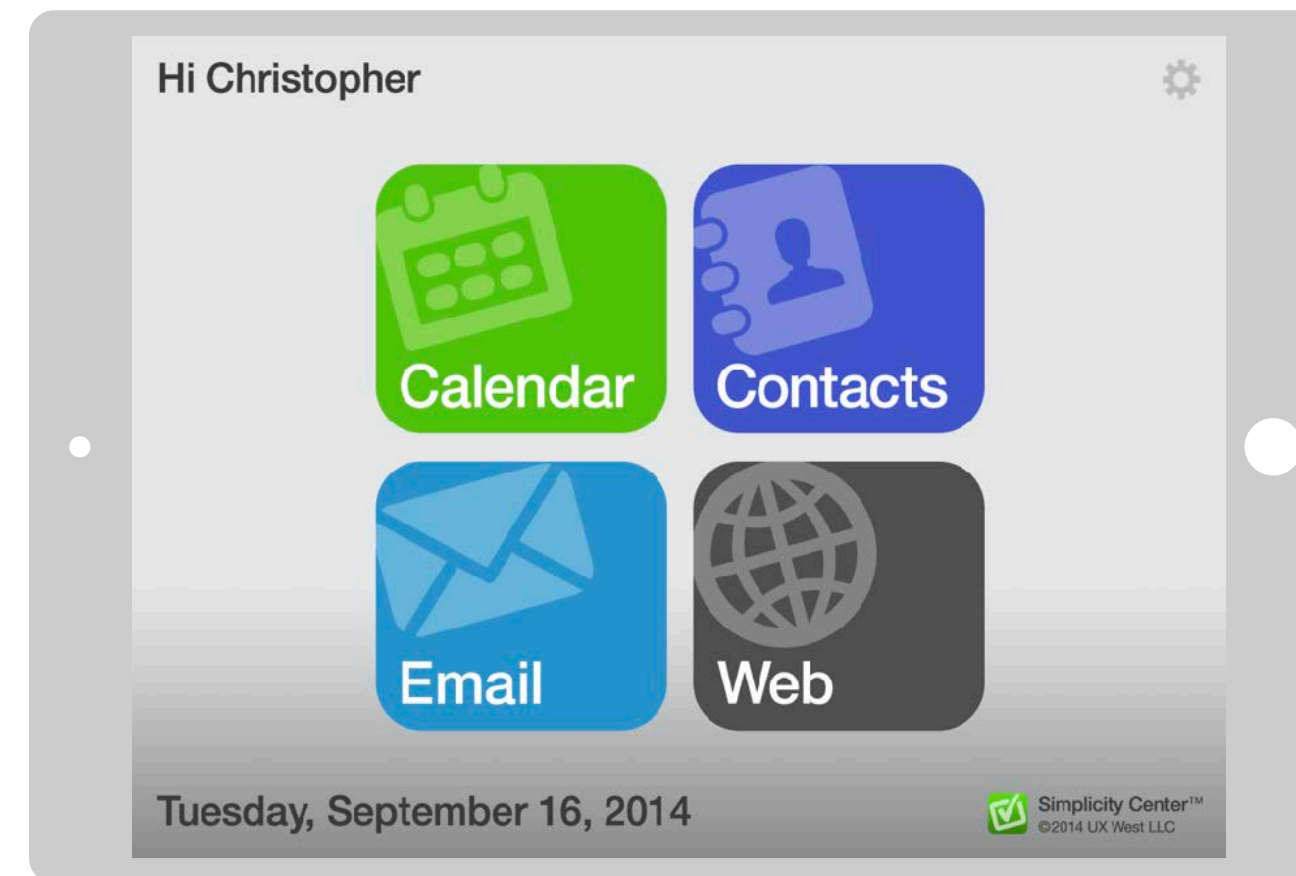




## Simplicity Center™

### SCOPE OF WORK

- ▶ I created a high-fidelity prototype showing app screens and user flow (responsive for both landscape and portrait iPad orientations).
- ▶ I developed a series of video tutorials and PDF guides for administrators and app users.



RESPONSIVE  
AXURE PROTOTYPE:  
THE COMPLETE  
IPAD APP



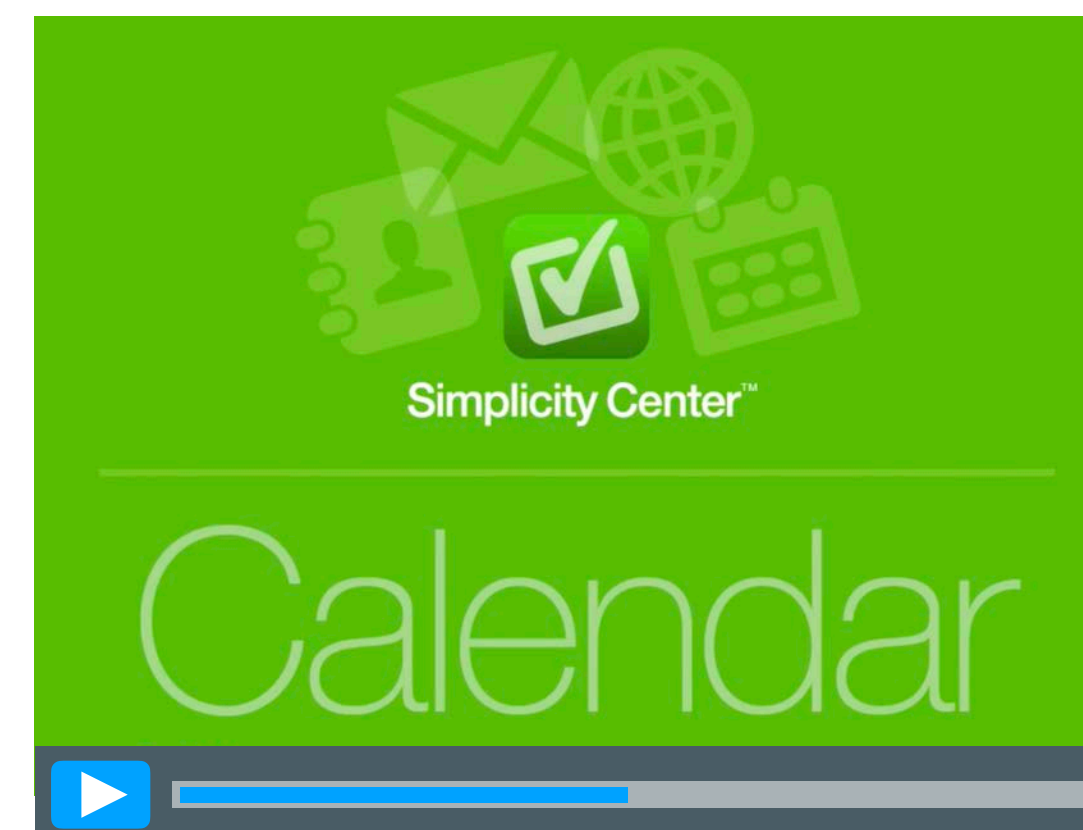
TUTORIAL VIDEO:  
APP OVERVIEW



TUTORIAL VIDEO:  
CALENDAR MODULE



TUTORIAL VIDEO:  
ADMIN MODULE



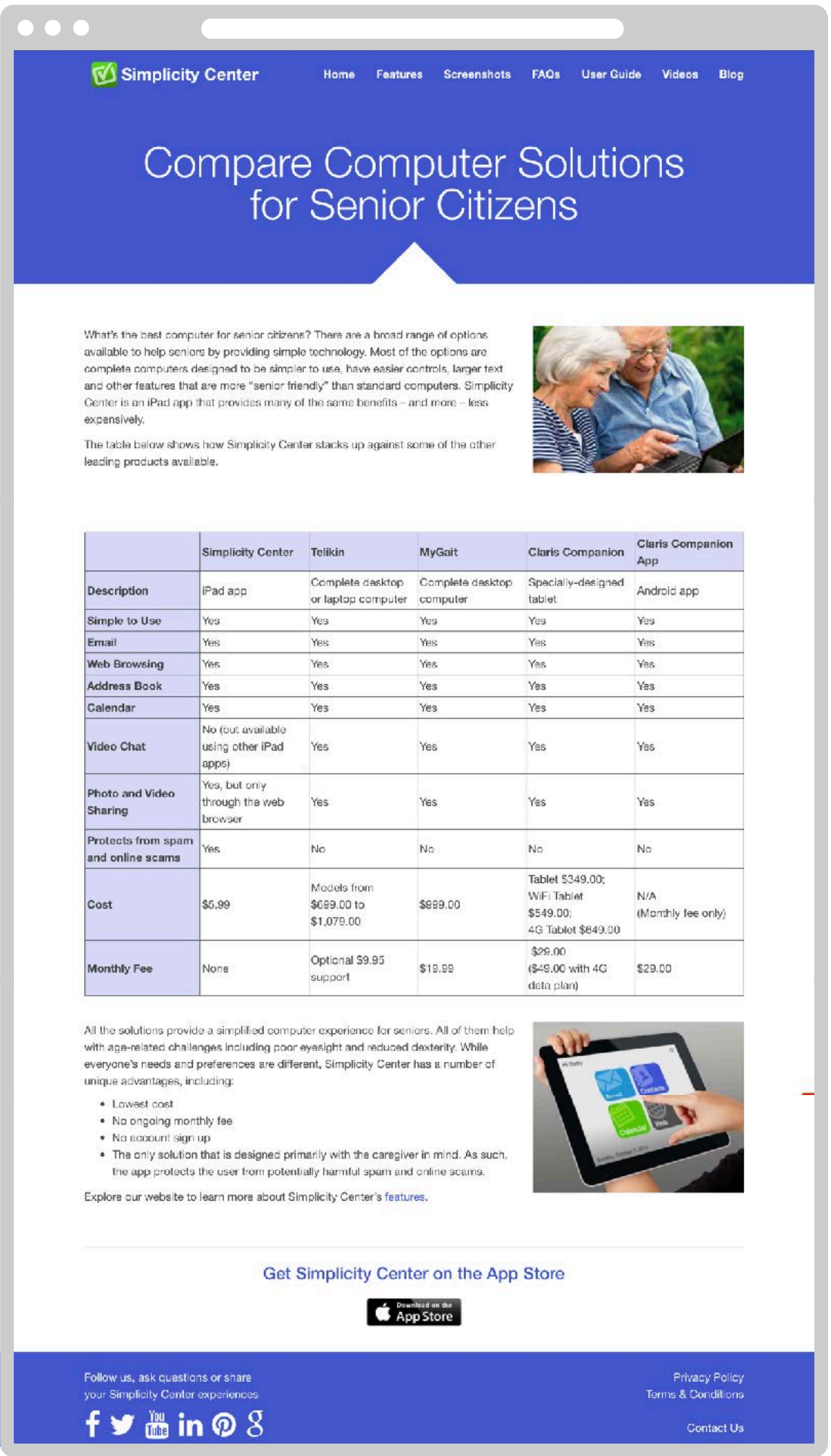
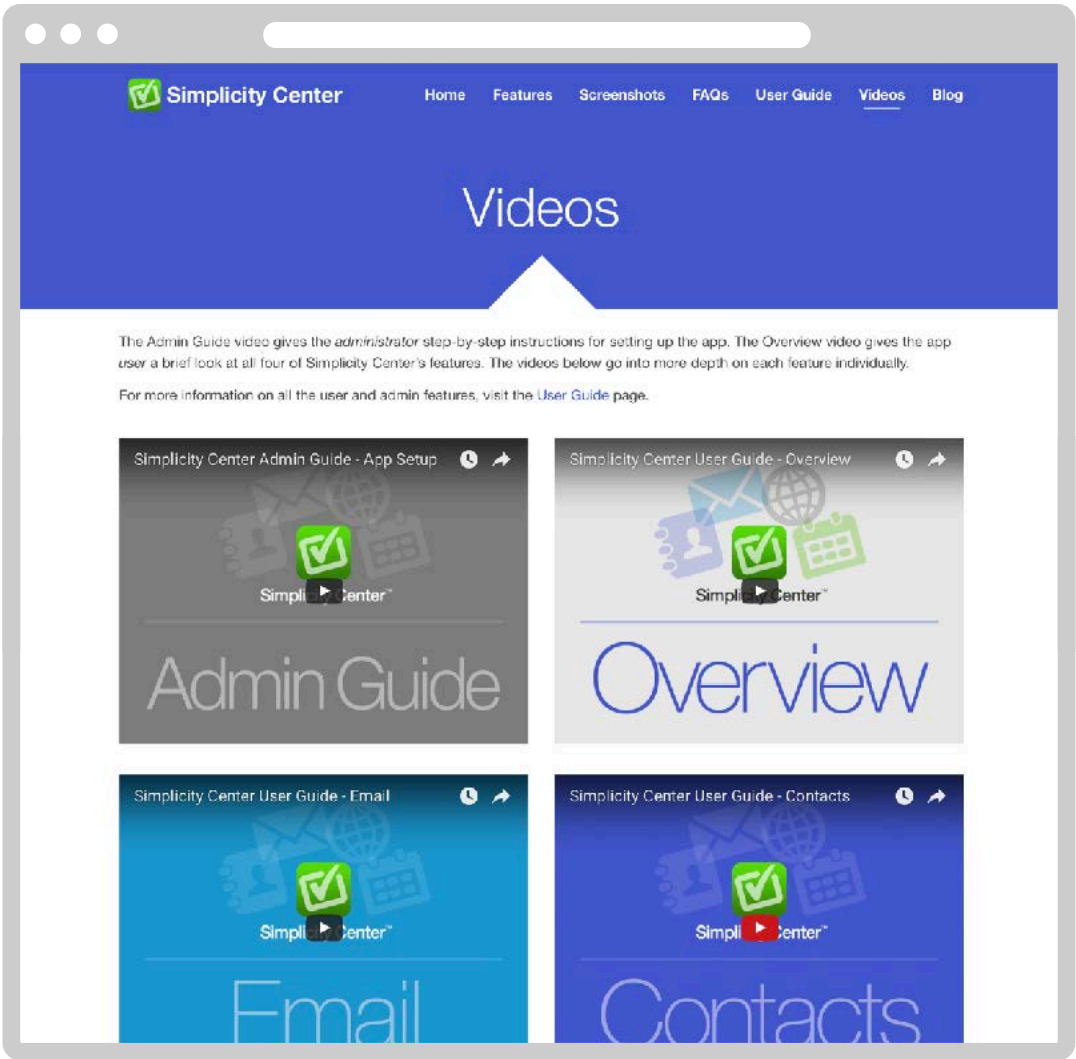
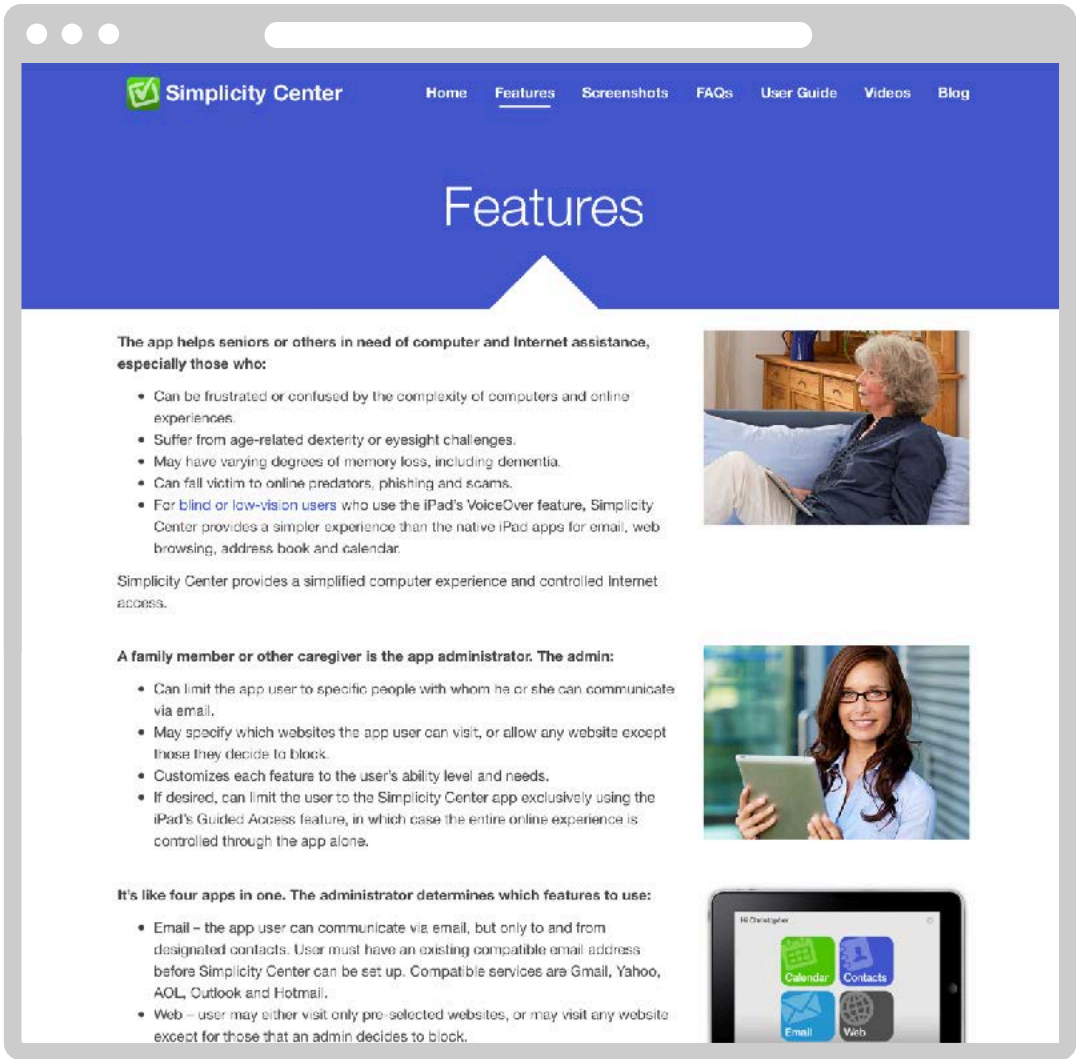




# Simplicity Center™

## SCOPE OF WORK

- I designed and developed a WordPress site to promote the app and explain its features and benefits.
- The site housed admin and user videos and PDF guides as well as FAQs and a blog.



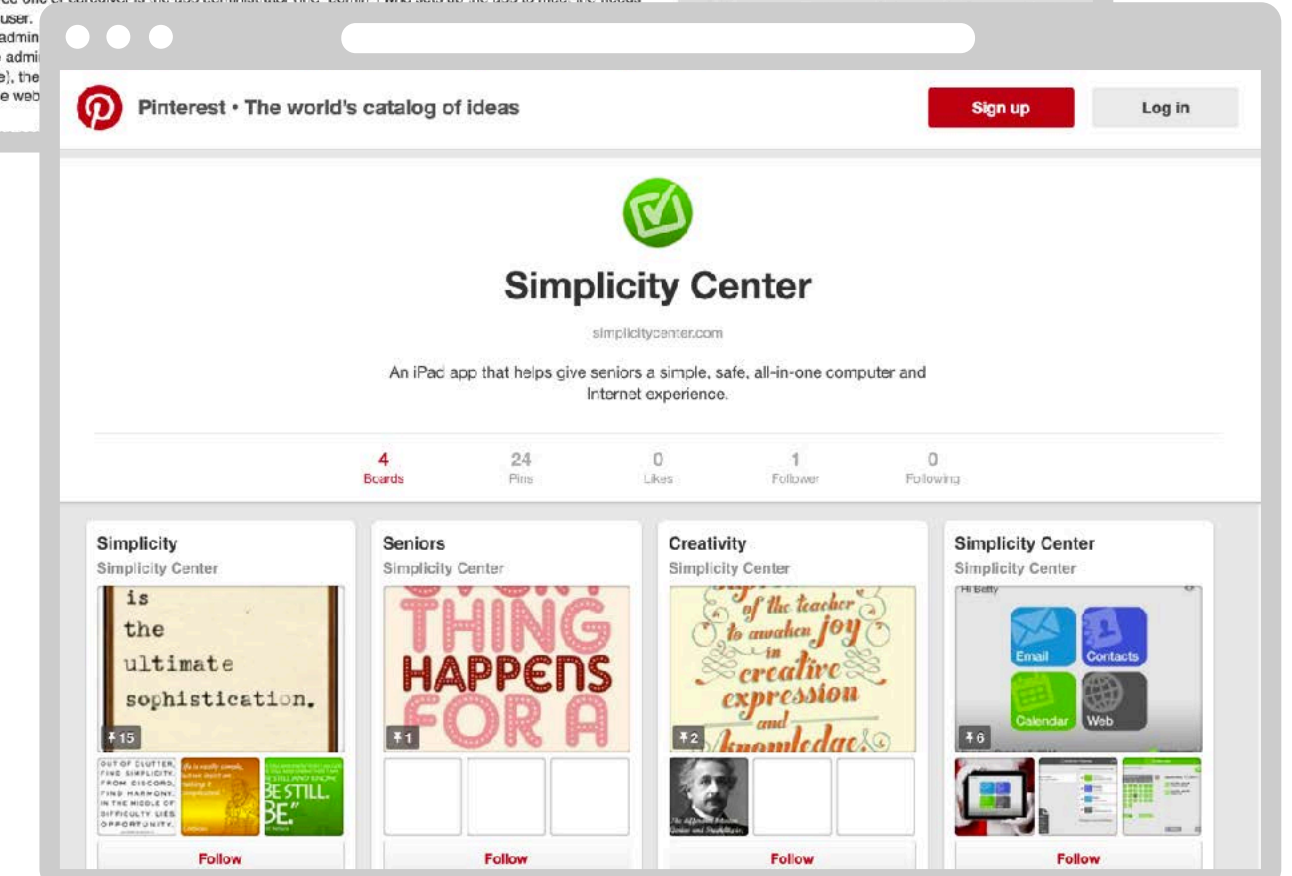
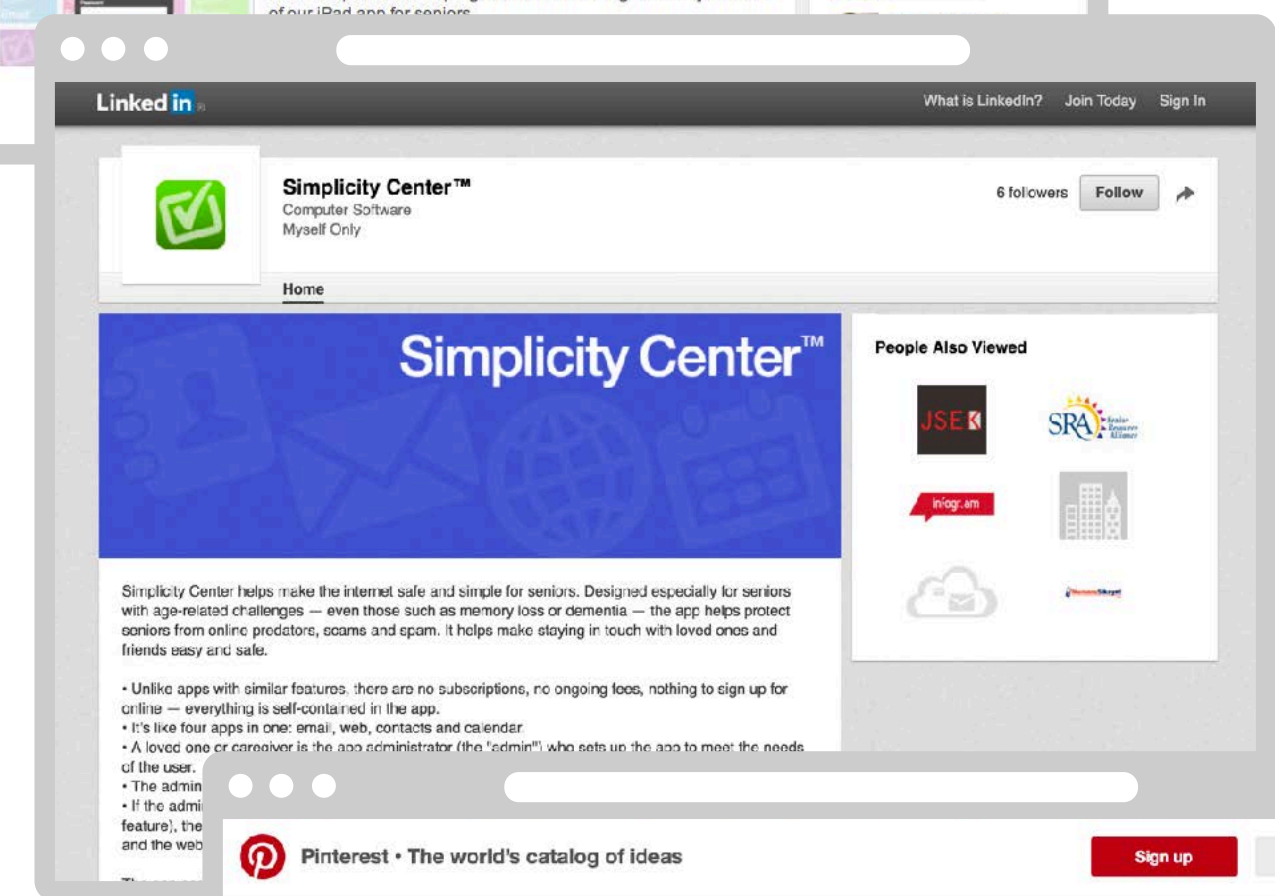
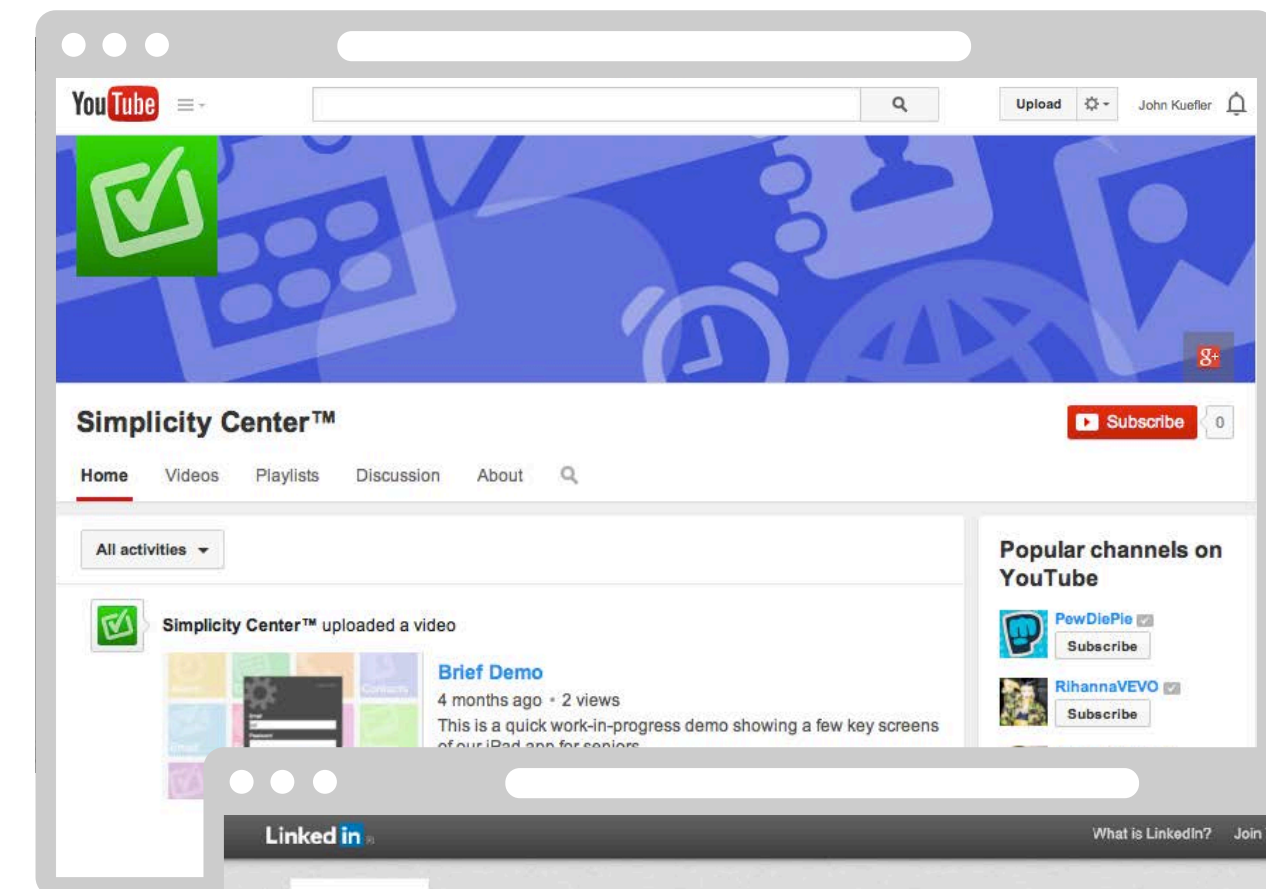
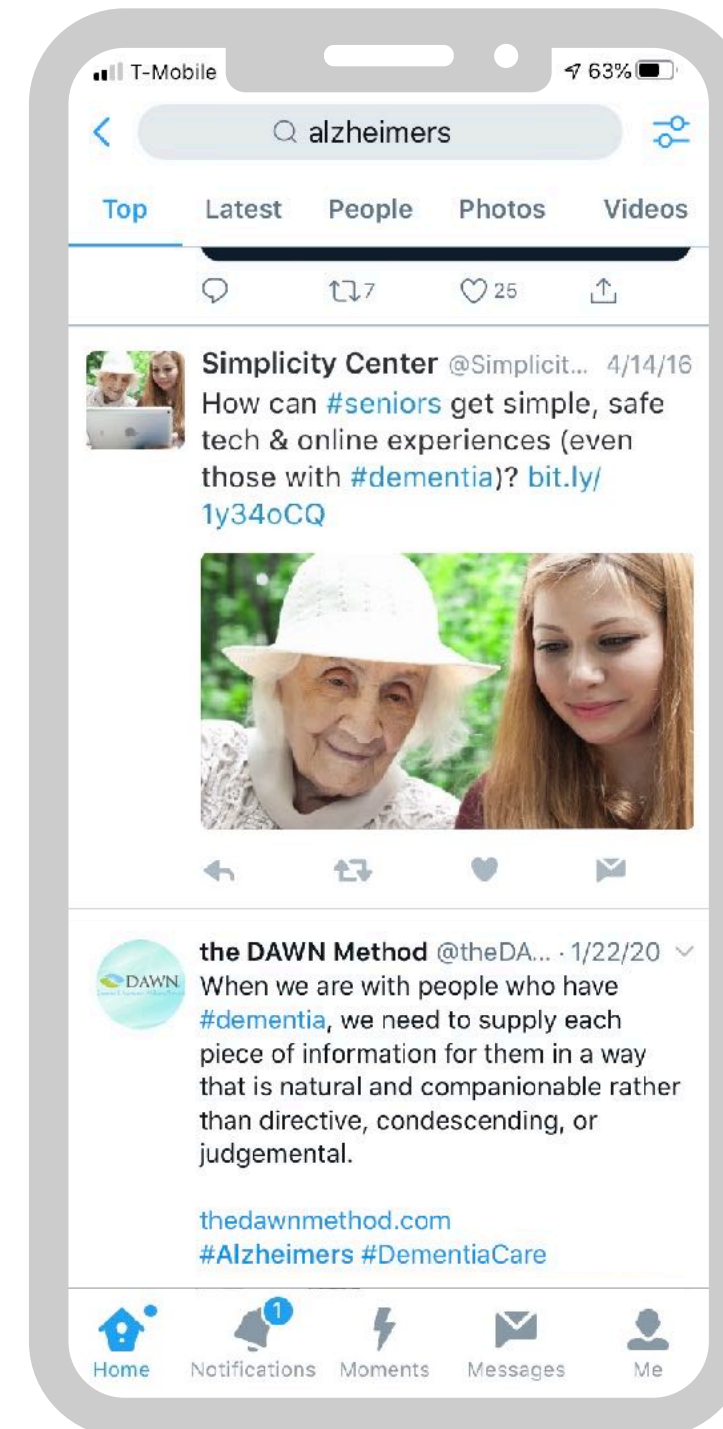
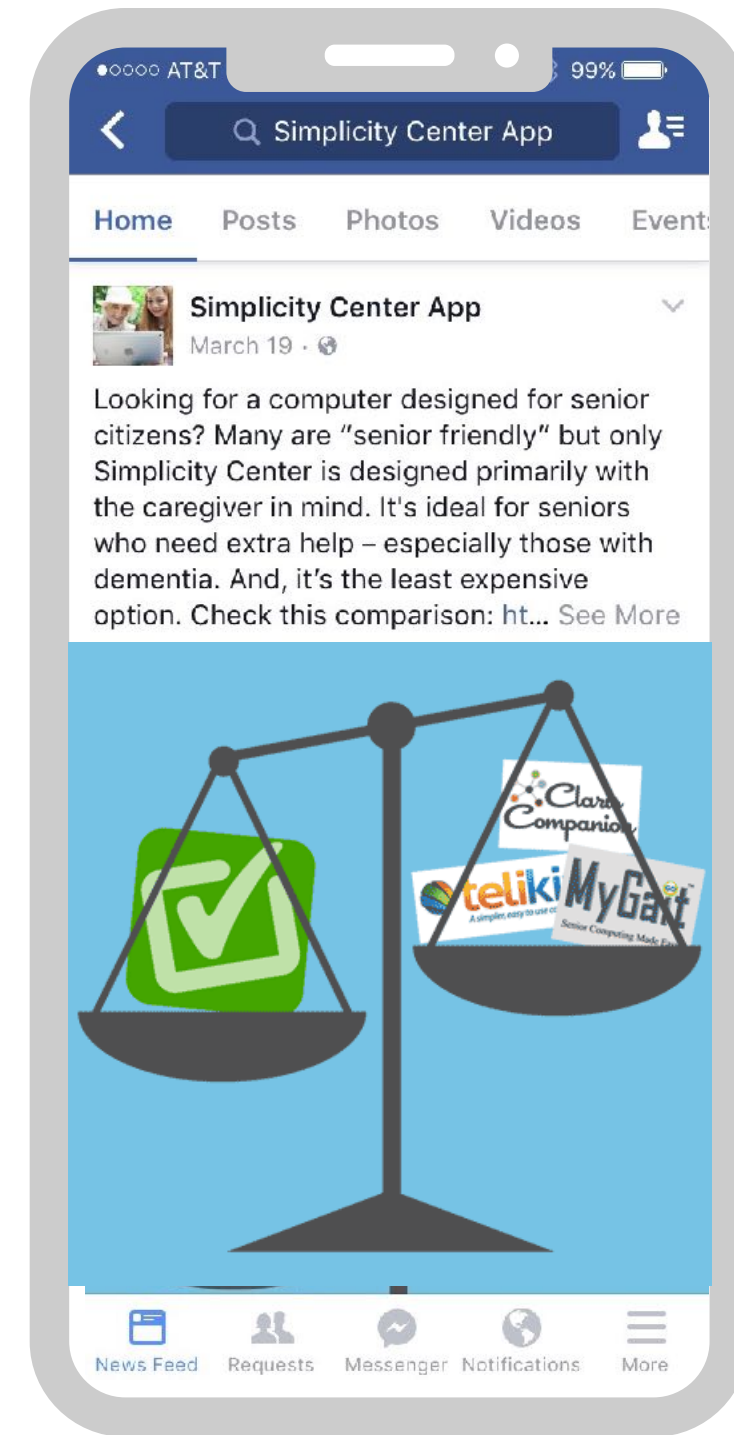




# Simplicity Center™

## PROMOTION

- I promoted the app with Google Adwords and on five social media channels.
- The app was featured in a story on the *PBS Next Avenue* website.



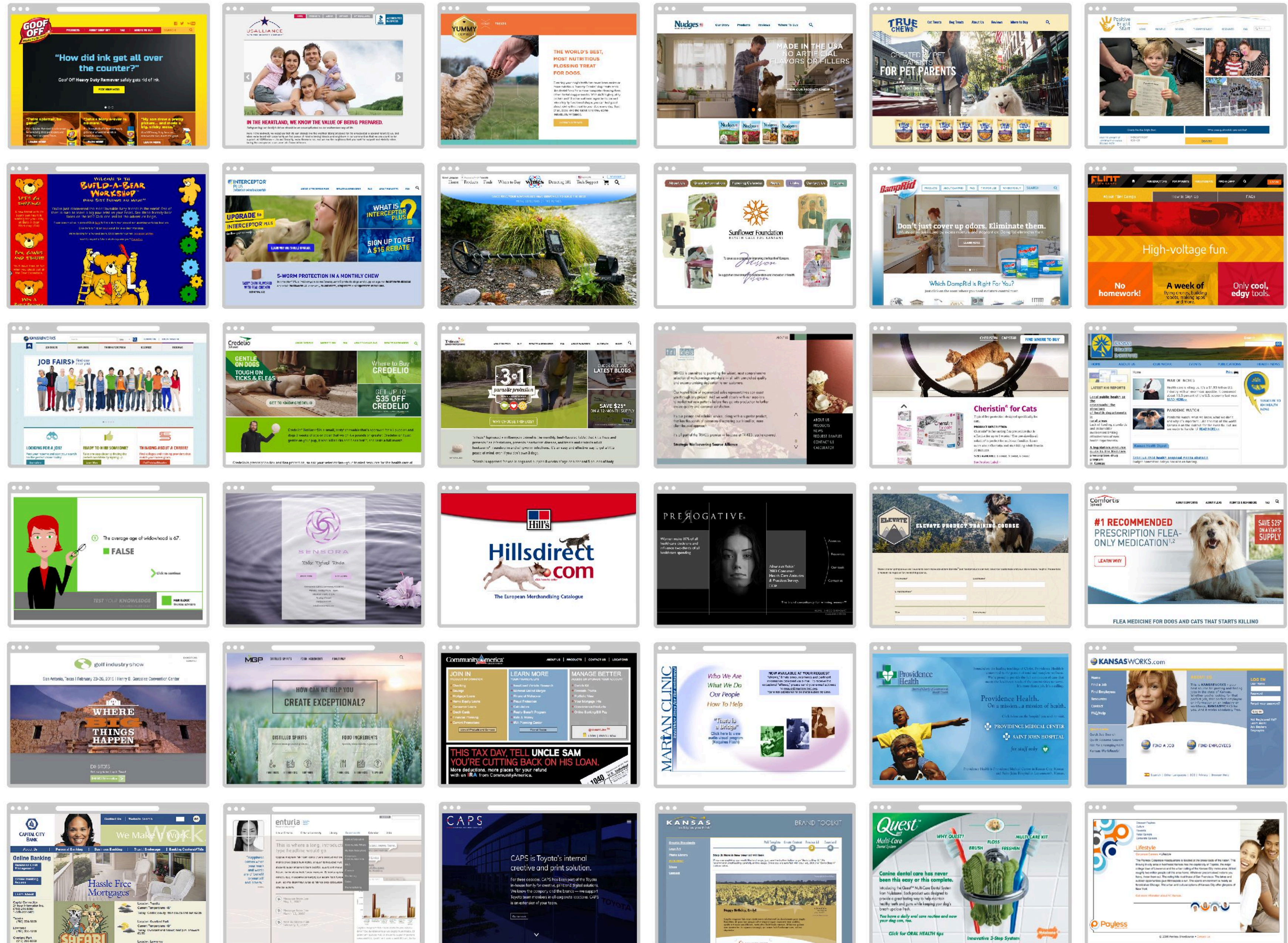
NEXT AVENUE STORY





# WEBSITES

- In roles ranging from UX designer, creative director, graphic designer and writer to technical architect and project manager, I've created or managed dozens and dozens of web projects from simple sites to complex online applications.



JOHN KUEFLER

UXWEST



# BRAND EXPERIENCE

► Some of the many brands I've worked with.





# PLATFORM EXPERIENCE

- I'm well-versed in WordPress, but I've done UX design and created content for numerous other CMS systems, ensuring accuracy and pixel-perfect quality that's tailored to each site's technical requirements.





User experience design  
and content creation



[UXWEST.COM](https://uxwest.com)