Neha Kodi
Design Researcher & Strategist
Portfolio

A collection of case studies that highlight my experience and expertise across product, UXR, and service design

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About Me

With 5 years of experience in design research and strategy, I specialize in uncovering deep user insights that drive impactful, human-centered solutions for complex challenges. My expertise lies in leading qualitative and quantitative research to inform product design, ensuring that user needs and business goals are seamlessly aligned.

My passion for storytelling, strong analytical skills, and curiosity for understanding diverse user behaviors allow me to approach challenges with a holistic perspective.

RESEARCH | Expertise in leading a diverse range of mixed methods research, from exploratory to evaluative discovery phases, encompassing scoping, planning, conducting, and synthesizing insights.

STRATEGY | Extensive experience intersections between market insights, user needs, and business objectives to drive innovative, user-centric solutions that align with broader business strategies.

DESIGN | Demonstrated background in designing and delivering UX and service concepts with a focus on rapid prototyping, user testing, and adaptive iteration.

Case Studies

USER EXPERIENCE

SERVICE DESIGN
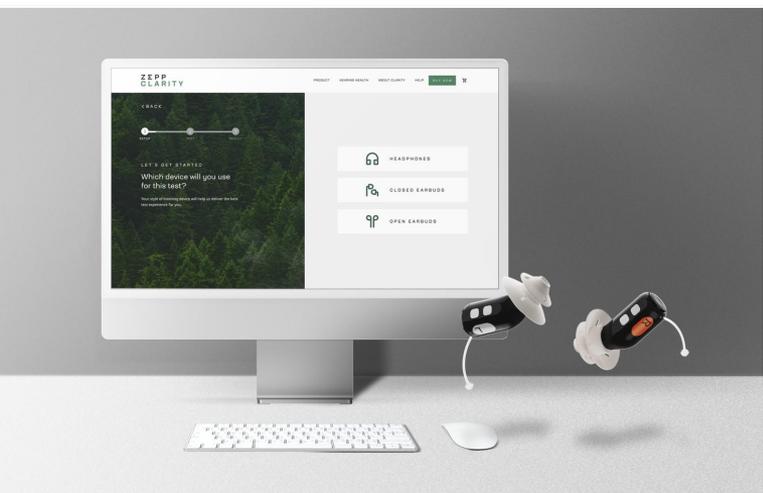
Simplifying the Assisted Hearing Experience

Integrating the end-to-end customer journey for a revolutionary hearing solution

Design Strategist, Propelland

Simplifying the Assisted Hearing Experience

Project Overview

After recently launching its next-gen hearing aid in the US, Zepp aimed to differentiate itself in a competitive market. To build early brand awareness and trust, Zepp needed to empower hearing-challenged consumers with holistic support throughout the end-to-end customer experience across all product, UX, and service touchpoints.

Methodology

Ethnography combined with UXR to holistically understand the Zepp Clarity customer journey and identify gaps in the user experience.

- **Comprehensive UX Audit:** Evaluated Zepp's marketing website, hearing aids, and mobile app to identify friction points, magic moments, and opportunities for improvement.

- **Qualitative Contextual Study:** Conducted a 4-week integrated diary study using Indeemo with 5 participants, representing the target demographic, to document interactions with Zepp touchpoints across their daily routines.

- **Journey Mapping:** Comprehensively mapped all human and digital interfaces, interactions, and sentiments using Figjam throughout the customer journey from product exploration to maintenance.

My Role

I led customer research, data synthesis, and holistic strategy to enhance user experience and align service design with strategic business goals.

- Crafted the research plan encompassing knowledge goals, interview guides, diary study tasks, micro-surveys, and UX audit flows.

- Coordinated participant recruitment, scheduling, and logistics.

- Moderated weekly in-depth participant interviews.

- Led synthesis of insights spanning hearing aid interactions and mobile app user experience to co-create holistic user journey map.

- Crafted feature prioritization frameworks based on strategic pillars, value drivers, customer impact, and key performance indicators.

5

Simplifying the Assisted Hearing Experience

Methodology
I crafted a research plan leveraging mixed methods to capture a holistic and comprehensive understanding of the customer journey.

KEY OBJECTIVES

Business Goal
Successfully launch Zepp Clarity ONE and provide insights for new generations to come

Brand Goal
Build awareness of Zepp Clarity and create credibility and trust

User Goal
Help shift social perception and empower our users with frictionless purchasing experience through both physical and digital touchpoints

KNOWLEDGE GOALS

Here are three key questions we are trying to answer through the research study:

1. How does the Zepp Clarity ONE compare to **customer expectations** encompassing **acquisition, ownership, and retention**?

2. How can Zepp Clarity **shape its brand and instill trust** while aligning with the lifestyle values of its customers?

3. How can Zepp Clarity deliver exceptional customer experience **across its digital and physical touchpoints**?

METHODOLOGIES

RESEARCH TARGET + SCREENER CHARACTERISTICS

• **N=5**
• Potential and existing hearing aid users experiencing **mild to moderate hearing loss** below 50dB
• No one rejects wearing a hearing aid in the next year
• Based in the US
• Aged **40 - 70 years old**
• **Minimum annual income**: $50K
• **Receptive to smartphone** operations

FORMAT
• Diary exercise
• Survey
• Online 1:1 60min **in-depth interviews** (IDIs)

RESEARCH PARTICIPANTS

A balanced mix of demographic profiles to generalize study results and provide a holistic overview of our customers' behaviors.

Alex. M	Eve. G	Suzie. H	Brian. H	David. A
Existing Device Owner	Existing Device Owner	Existing Device Owner	First Time User	First Time User
Profile	**Profile**	**Profile**	**Profile**	**Profile**
• Gender: Male	• Gender: Female	• Gender: Female	• Gender: Male	• Gender: Male
• Age: 50-59	• Age: 40-49	• Age: 60-69	• Age: 40-49	• Age: 50-59
• Household's annual income: $75K-$100K	• Household's annual income: Over $125K	• Household's annual income: Over $125K	• Household's annual income: $50K-$75K	• Household's annual income: $75K-$100K
• Moderate hearing loss (41-50dB)	• Mild hearing loss (26-40dB)	• Moderate hearing loss (41-50dB)	• Mild hearing loss (26-40dB)	• Moderate hearing loss (41-50dB)
• Current device: Phonak	• Current device: Eargo	• Current device: Eargo		

RESEARCH PLAN

SMART HEARING AIDS FOR YOUR CONNECTED LIFE

SHOPPING + ORDERING
Week 1 (8/8/22 - 8/12/22)

Goal
Identify the consumer expectations and experience around exploring and purchasing a hearing device online

Touchpoints
• Website
• Email

ORDER TRACKING
Week 2 (8/15/22 - 8/19/22)

Goal
Capture consumer sentiments during the order waiting period

Touchpoints
• Email

UNBOXING, SETUP + USE
Week 3 (8/22/22 - 8/26/22)

Goal
Observe the adoption and interactions of the device regarding fit and function to the consumers' routines

Touchpoints
• Packaging
• Device
• Mobile app

CUSTOMER SERVICE, RETURN
Week 4 (8/29/22 - 9/2/22)

Goal
Identify the level of support expected and received by the consumer with product issue resolution and returns

Touchpoints
• Website / Chatbot
• Phone call

JOURNEY PHASE

AWARENESS > **ACQUISITION** > **ONBOARDING** > **OWNERSHIP & USE** > **RETENTION**

AWARENESS

User Actions
• Explore the website
• Go through hearing assessment
• Explore competitors
• Audiologist consultation

ACQUISITION

User Actions
• Check-out on the website
• Receive email w: their purchase
• Tracking shipment

ONBOARDING

User Actions
• Unboxing
• Setup
• Email guidance

OWNERSHIP & USE

User Actions
• Daily use
• Email guidance on tips

RETENTION

User Actions
• Troubleshooting with CS
• Return the device

Simplifying the Assisted Hearing Experience

Key Findings & Insights

Participants, across new and experienced hearing aid users, faced challenges with Zepp's physical and digital interfaces while being delighted by human touch points.

- **Low Customer Confidence:** Zepp's website lacked compelling product context, leading to purchase hesitation.

- **Inefficient Self-Servicing:** New users faced a steep learning curve with hearing aid and mobile app setup, resulting in frustration.

- **Lack of Product Personalization:** Limited calibration and control options in Zepp's mobile app led to dissatisfaction due to users' inability to customize their hearing experience.

- **Humanized User Experience**: Live, virtual consultations with expert audiologists through Zepp's website provided users with empathetic support, which was a major driver for both acquisition and retention.

Recommended Solutions

Zepp needed to ensure a seamless and cohesive user experience across all touchpoints—physical, digital, and human— to maximize user loyalty from initial awareness through long-term retention.

- **Website Optimization:** Redesign the website with segmented content tailored to different customer groups, enhancing purchase confidence and reducing cart abandonment.

- **Streamlined Onboarding:** Simplify the hearing aid setup process through the Zepp app, providing clear, step-by-step guidance and support to improve user onboarding and reduce frustration.

- **Expanded Customization**: Enhance the mobile app by introducing more personalized and customizable options, catering to diverse user needs and improving daily interactions with the device.

- **Proactive, Humanized Support:** Integrate ongoing, personalized support within the mobile app, leveraging humanized touchpoints such as in-app consultations and proactive assistance to boost user satisfaction and retention.

7

Simplifying the Assisted Hearing Experience

Key Findings & Insights

We created a detailed customer journey map, informed by our extensive research, to outline key touchpoints, pain, and gains.

(Take a closer look on Figma)
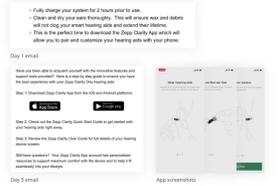

8

Simplifying the Assisted Hearing Experience

"Instead of making a sale, [the audiologist] actually talks about hearing loss. I learned a lot."

— DAVID A.

Recording of participant in an audiologist session (pre-purchase)

Research participant Brian speaking to onboarding process

Day 1 email

App screenshots

"Where do I start?"

"What is this?"

"How often do I need to clean the hearing aid?"

"Do I need to charge them before use?"

Survey Data

Most customers were **unsure of when and how to expect the delivery** of their order.

How confident are you in knowing when to expect the delivery of your Clarity hearing aid order?

20% | 20% | 40% | 20%

- Extremely confident
- Very confident
- Moderately confident
- Slightly confident
- Not confident at all

Shipping tracking email

"I have no idea which carrier it is. And I have no idea to track it. And so I have no idea when it's going to arrive. And of course, that's very *frustrating*"

— BRIAN H.

Default presets are not intuitive
Customers can't differentiate between preset 1 to 4. More descriptive language is needed to allow engagement with different programs

Provide more context
For new users, providing context and info could go a long way. In this case, we can add a tooltip icon next "Bass" and "Treble" to indicate how the adjustment would impact the sound quality.

Lack visual hierarchy
The key information is hidden in the body text without any visualization or context to support the hearing assessment results.

Hearing test result email

Product page

Check-out page

Key benefits samples

Reminding prospective customers of the trial and hassle-free return offer (and ongoing audiologist consultation) at the point of purchase will encourage them to complete their purchase.
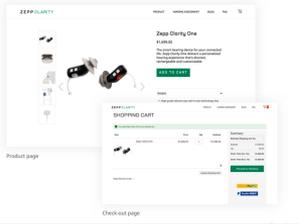
"The more images, videos and product details about the hearing aid the more I am going to feel confident it is the right one for me."

— EVE G.

Link to more product photos

Survey Data

Prolonged time to access the return label made the return process an added layer of difficulty for some customers.

How did you find the process of completing the return of the Clarity hearing aids?

40% | 40% | 20%

- Extremely easy
- Somewhat easy
- Neither easy nor difficult
- Somewhat difficult
- Extremely difficult

Research participant Alex speaking to options for return

USPS Label Broker Service

Simplifying the Assisted Hearing Experience

Areas of Opportunity
We developed strategic recommendations for holistic service transformation for each stage of the end-to-end customer journey.

STRATEGIC PILLARS

PRODUCT INNOVATION	DATA ANALYTICS	BRAND & MESSAGING	SERVICE EXTENSION	CUSTOMER ENGAGEMENT
Inform the innovation pipeline by leveraging the captured insights, along with the latest hearing technology, and connectivity to the Zepp ecosystem.	Track and analyze data captured from existing product usage and touchpoints to inform strategy and innovation initiatives.	Elevate the perception of Zepp Clarity as part of a greater ecosystem that establishes trust and credibility with our customers lifestyles.	Expand experiential offerings across different stages of the customer journey to ensure customer satisfaction.	Provide best-in-class user experience through both digital and physical touchpoints.

RECOMMENDATION METRICS

CUSTOMER VALUE	CUSTOMER IMPACT	KPI
Personalized experience	More than 60% of participants have been impacted	Conversion *Driving purchases, app, ups, form fills, etc.*
Trust and credibility		Engagement *No. of interactions of key actions — Daily, weekly, monthly, or even annually active users*
Confidence & Assurance	More than 60% of participants have been impacted	
Ease of use		Retention *Users coming back + customer satisfaction + recommendations*
Accessibility	Less than 25% of participants have been impacted	Revenue *Sales generated*
Control		

INFORMED EXPLORATION

JOURNEY PHASE AWARENESS › ACQUISITION › ONBOARDING › OWNERSHIP & USE › RETENTION

RECOMMENDATIONS	CUSTOMER VALUE	USER IMPACT	PILLAR	KPI
Customize website layout to purchase motivations. Tailor the website design through SEO to the intention by which users are visiting Zepp Clarity e.g. first time hearing aid user, switching from another product vs. purchasing for a loved one.	Personalized experience	H	Data Analytics / Brand & Messaging	Conversion Revenue
Clearly communicate relevant product information to drive conversion. Immediately provide customers with product details such as fit expectations, functional capabilities, and competitive differentiators to quickly convey the value gained from Clarity.	Transparency	H	Brand & Messaging	Conversion Revenue
Promote audiologist consultation as an end-to-end service offering. Offer the professional yet empathetic advisement of the Zepp audiologist as a benefit that extends from awareness to retention to continually ease customers' emotional and functional concerns.	Trust and credibility	H	Brand & Messaging / Service Extension	Engagement Retention
Connect Clarity capabilities to visualized hearing assessment results. Offering customers visually comparative and detailed results directly on the website better informs them on the implications of their current hearing loss and how Clarity can best address them.	Confidence & Assurance	M	Brand & Messaging	Conversion

REASSURED PURCHASE

JOURNEY PHASE AWARENESS › ACQUISITION › ONBOARDING › OWNERSHIP & USE › RETENTION

RECOMMENDATIONS	CUSTOMER VALUE	USER IMPACT	PILLAR	KPI
Highlight key benefits at check-out to reduce cart abandonment. Emphasizing advantages like the trial and return period and ongoing audiologist consultation at the point of purchase will encourage customers to buy.	Confidence & Assurance	M	Brand & Messaging	Conversion Revenue
Streamline and centralize account creation and set-up. Immediately provide new Zepp customers with a central source to activate and maintain their continued engagement with Zepp over existing product interactions and future experiential offerings.	Accessibility	M	Customer Engagement / Data Analytics / Service Extension	Engagement
Provide transparent order tracking. Help customers be prepared to receive their order based on the timing and type of their package delivery.	Confidence & Assurance	H	Brand & Messaging	Engagement
Redesign check-out experience to initiate product education and setup. Advance customers through initial setup requirements like app download and preset navigation immediately after purchase to set them up for early success in using Clarity.	Confidence & Assurance	M	Brand & Messaging / Customer Engagement	Engagement

CONFIDENT SETUP

JOURNEY PHASE AWARENESS › ACQUISITION › ONBOARDING › OWNERSHIP & USE › RETENTION

RECOMMENDATIONS	CUSTOMER VALUE	USER IMPACT	PILLAR	KPI
Centralize onboarding through Zepp app. Minimize and streamline the sources of references that support customers in clearly and consequentially following Clarity set up instructions.	Ease of use	H	Customer Engagement	Engagement Retention
Improve device personalization and optimize guidance for daily use. Support customers in efficiently and effectively adjusting Clarity settings to their evolving needs through clear communication and data-driven guidance on device controls.	Ease of use	H	Customer Engagement / Data Analytics	Engagement
Extend audiologist support after delivery to guide setup of Clarity. Provide personal guidance particularly to inexperienced customers to ensure they feel properly accustomed to the fit and function of Clarity.	Personalized experience	M	Service Extension	Engagement Retention
Design packaging to simplify set-up process. Enabling customers to unbox Clarity in the order they will need to interact with the package items to set up their hearing aids will make onboarding a seamless experience.	Ease of use	L	Customer Engagement	Retention

INTEGRATED DAILY USAGE

JOURNEY PHASE AWARENESS › ACQUISITION › ONBOARDING › OWNERSHIP & USE › RETENTION

RECOMMENDATIONS	CUSTOMER VALUE	USER IMPACT	PILLAR	KPI
Enhance existing capabilities to deepen personalization to Clarity. Optimizing functions with a wider scale of preset modifications, volume control, and more discreet program switching interactions allows customers to better adjust Clarity to their needs.	Control	H	Product Innovation / Customer Engagement	Retention
Develop new capabilities to broaden Clarity use cases. Offering unique functions like Bluetooth and smart volume adjustment enable customers to use Clarity across a wider range of their daily routines.	Control	H	Product Innovation / Customer Engagement	Retention
Collect Clarity usage data to inform future product enhancements. Track Clarity usage and adjustment patterns through Zepp app to capture customer behaviors and identify opportunities for improved or new capabilities.	Control	H	Data Analytics / Product Innovation	Engagement
Develop a long-term hearing health service. Offer ongoing product and hearing health guidance to ensure satisfaction with Clarity drive long-term retention.	Trust and credibility	H	Data Analytics / Service Extension / Customer Engagement	Retention

UNCONDITIONAL SUPPORT

JOURNEY PHASE AWARENESS › ACQUISITION › ONBOARDING › OWNERSHIP & USE › RETENTION

RECOMMENDATIONS	CUSTOMER VALUE	USER IMPACT	PILLAR	KPI
Offer Zepp customer support and self-service consistently across all touchpoints. Ensuring customers receive assistance at the time and through the touchpoint they need it will help them maintain a positive relationship with Zepp.	Trust and credibility	M	Brand & Messaging / Customer engagement	Retention
Provide a hearing aid upgrade program. Offering customers a flexible and frictionless way to exchange their hearing aids for enhanced products will build long-term loyalty to Zepp.	Accessibility	H	Service Extension / Product Innovation	Conversion Revenue
Provide a hearing aid maintenance membership. Offering to service or replace Clarity parts after fixed periods of time will enable customers to prolong the effective functionality of their hearing aids.	Control	M	Service Extension	Retention
Expedite product return or replacement process. Offer customers a range of informed options to easily return or replace their Clarity device that models best-in-class industry practices to ensure positive customer experience.	Accessibility	M	Service Extension	Retention

10

Simplifying the Assisted Hearing Experience

Impact

- **Improved Conversion Rates:** The redesigned website and enhanced communication strategies led to increased purchase confidence and reduced cart abandonment.

- **Higher User Satisfaction:** Streamlined onboarding and expanded device capabilities resulted in better user experiences and higher product satisfaction rates.

- **Increased Retention:** Proactive and personalized support initiatives significantly improved customer retention and long-term loyalty.

Reflection

Challenges: This project highlighted the complexity of designing for diverse user groups with varying levels of experience and needs. Balancing the demands of product innovation with the necessity of empathetic, user-centered design was a key challenge.

Outcome: The research and design recommendations not only informed the successful launch of Zepp Clarity ONE but also set a new standard for user experience across future product generations. The project underscored the value of combining qualitative and quantitative insights to drive meaningful and impactful design decisions.

References

You can learn more about this project here:
https://propelland.com/works/zepp/

11

Fostering Financial Recovery and Resilience

Demystifying the fiscal behaviors and motivations of habitual borrowers

UX Strategist, OppFi

The visual details of this project are confidential under NDA.

Fostering Financial Recovery & Resilience

Project Overview

OppFi, whose mission is to provide underserved communities with accessible financial solutions, found a large subset of loyal but vulnerable customers who were frequently refinancing (reborrowing against) their high-interest loans. To promote a more responsible lending user experience, we explored the financial motivations, challenges, and triggers behind serial refinancers.

Methodology

Comprehensive qualitative research study to explore the financial behaviors of customers who had refinanced their loans 10+ times.

- **Quantitative Analysis:** Analyzed customer data to segment serial refinancer population, guiding participant selection.

- **In-Depth Interviews**: Conducted 60-minute 1:1 remote interviews with 20 serial refinancers via Zoom to explore their financial backgrounds, circumstances, goals, and OppFi experiences.

- **Behavioral & Sentiment Analysis:** Identified key financial behaviors, motivations, and challenges through synthesis using Miro.

- **UX & Product Strategy:** Translated insights into actionable strategies to guide future product design, user experience enhancements, and responsible lending initiatives.

My Role

I led the research and synthesis efforts, ensuring our findings were effectively translated into actionable insights.

- Owned the research plan, coordinated recruitment, crafted interview guides, and oversaw the execution of the study.

- Analyzed qualitative data to uncover critical insights into refinance behaviors, identifying patterns and outliers.

- Developed detailed personas and strategic frameworks to illustrate customer decision-making across spending, budgeting, saving, credit use, and financial planning.

- Created an exhaustive report with findings, insights, opportunities, and starting point actions.

13

Fostering Financial Recovery & Resilience

Key Findings & Insights

Customers were unable to graduate out of debt due to their habitual, over-reliance on refinancing their existing loans.

- **Low Borrowing Awareness:** Customers vastly underestimated their refinancing frequency, recalling 55% fewer instances than the actual occurrence.

- **Visually Emphasized CTA Hierarchy:** Applying to refinance as easy as pressing a button, due to its high visibility in the customer portal.

- **Refinancing for Supplemental Income:** Customers relied on reborrowing funds as a primary means to cover expenses that their primary income couldn't sufficiently support.

- **Financial Literacy Gaps:** Often treating loan payments as routine bills, not fully recognizing the long-term impact on credit.

- **Emotional Attachment to Savings:** Many customers preferred to refinance for more cash than using their own available funds.

Areas of Opportunity

It was vital to empower customers in managing their financial health with increased transparency to promote responsible borrowing.

- **Enhanced Credit Education:** Develop interactive and accessible educational tools within the platform to guide customers towards making informed and sustainable financial decisions. These resources would support long-term financial well-being by encouraging better money management practices.

- **Personalized Debt Transparency:** Implement dynamic, data-driven messaging in the customer portal that provides real-time insights into individual debt payoffs. This personalized approach aims to increase awareness of financial progress and reinforce positive behaviors.

- **Adaptive Refinance Guidelines:** Introduce a flexible eligibility system that adapts to individual user behaviors to identify and support customers who are at risk of repeated refinancing, promoting responsible borrowing while maintaining access to necessary financial products.

14

Fostering Financial Recovery & Resilience

Impact

- Findings from this study led to the development of hypotheses for quick-win solutions aimed to reduce consecutive loan refinancing while maintaining financial access for vulnerable customers.

- Promoting alternative lending solutions was feasible with only 8% of loan volume stemming from the serial refinancer customer segment.

- The organization adopted an insight-driven approach to enhance customer engagement and UX strategy, leading to ongoing references to this research for responsible lending initiatives.

- Functions across OppFi continue to reference insights from this research to inform product strategy and improve user experience for responsible lending products.

Reflection

Challenges: As OppFi's first venture into qualitative research, the study revealed logistical and compliance challenges due to the company's prior reliance on quantitative data and stringent restrictions on customer contact.

Outcome: Successfully navigating these hurdles with agility and ingenuity allowed us to establish a new standard for integrating qualitative insights with quantitative data, leading to a more comprehensive understanding of customer behavior and the development of insight-driven product strategies.

15

The visual details of this project are confidential under NDA.

Reimagining Software Roles & Permissions

Enhancing role-based access management for frictionless workplace collaboration models

Senior Design Strategist, Propelland

Reimagining Software Roles & Permissions

Project Overview

A global IT SaaS leader aimed to reimagine role-based access management throughout its complex software ecosystem to meet the shifting needs of workplace collaboration. The objective was to understand the current practices of role assignment and user management across multi-product platforms, with the goal of aligning software access control with organizational needs.

Methodology

Exploratory and qualitative UXR to capture insights into how admins assign roles and manage permissions across in-app and platform levels.

- **Exploratory Interviews:** Conducted remote in-depth-interviews with 16 participants from 13 B2B customers to understand their experiences, challenges, and needs with role-based access management.

- **Stakeholder Mapping:** Identified key players, relationships, and activities involved in assigning software roles within organizations.

- **Segmentation of Roles**: Explored role types and permission levels required within in-app and cross-system contexts.

- **UX Walkthroughs:** Analyzed best-in-class role management experiences to benchmark ideal scenarios against current practices, identifying gaps and opportunities for improvement.

My Role

As Project Lead, I managed a cross-functional team through planning and execution of all milestones, leading to delivery of strategic insights.

- Developed a comprehensive research plan, encompassing stakeholder mapping, role segmentation, and qualitative analysis.

- Managed participant recruitment, scheduling, and logistics for in-depth interviews.

- Guided the creation of organizational archetypes and a multi-user journey map to illustrate the stakeholders, dynamics, and interfaces involved in software access distribution.

- Crafted a compelling presentation outlining key findings, strategic opportunities, and recommendations for enhancing role-based access management.

17

Reimagining Software Roles & Permissions

Key Findings & Insights

We identified a need for improved consistency, security, and customization to address common challenges in role-based access management.

- **Complexity in Role Assignment:** Users struggled with navigating the hierarchical and fragmented role assignment processes across different platforms, leading to inefficiencies.

- **Lack of Granularity:** The system's inability to tailor roles to specific needs resulted in security concerns and operational inefficiencies.

- **Inconsistent User Experience:** Variations in terminology and workflows across different applications caused confusion and slowed down role management tasks.

- **Prioritization of Security:** Though cost and collaboration were key considerations, security emerged as the most critical factor influencing role assignment decisions, regardless of organizational size or complexity.

Areas of Opportunity

The ideal software access experience will support tool allocation, work quality assurance, compliance regulation, and security management.

- **Unified Role Management Framework:** Establish a consistent taxonomy and streamlined workflows across all products to simplify role assignment.

- **Granular Role Customization:** Enable more precise control over permissions to better align with diverse organizational needs and user responsibilities.

- **Automated Compliance Monitoring:** Implement advanced tools for tracking and auditing role assignments to ensure adherence to organizational policies.

- **Simplified User Interfaces:** Design more intuitive interfaces that reduce complexity and improve efficiency of managing roles and permissions across platforms.

18

Reimagining Software Roles & Permissions

Impact

- The research informed the development of a unified framework for role-based access management, which aimed to streamline the process across various products.

- The insights also guided cross-functional efforts to create new tools and features to simplify role assignment, reduce errors, and improve overall user experience.

- These findings continue to influence strategic decisions and product enhancements in the broader software ecosystem.

Reflection

Challenges: Balancing the need for security with the demand for a simplified and user-centric role management process was a complex task. Additionally, designing a unified solution that accommodates diverse organizational structures and needs required careful consideration and iteration.

Outcome: The project resulted in a strategic framework that not only improved the current role management experience but also set the stage for future innovations in user access management. The collaboration underscored the importance of a holistic approach to design research in driving impactful service design and product strategy.

The details of this project are confidential under NDA.

Transforming Customer Experience with Delight

Strengthening customer relationships and retention for architectural glass manufacturer

Design Strategist, Propelland

Transforming CX with Delight

Project Overview

North America's leading architectural glass manufacturer aimed to reimagine and redefine its customer experience to strengthen their relationships with their core customer segments. This project focused on identifying gaps in the glass sales cycle to drive a service transformation that would modernize legacy processes, maximize brand value, and reinforce market position.

Methodology

Mixed methods research and service design strategy to define key touchpoints, elevate customer experiences, and activate value drivers.

- **Stakeholder Interviews:** Conducted group interviews across 3 B2B customer segments (35 participants) to map their glass sales cycle experience, identifying pains, gains, and unmet needs.

- **Co-Creation Workshops**: Facilitated ideation for 30+ stakeholders to develop value creators from identified areas of opportunity and envision the ideal customer experience.

- **Service Blueprinting**: Mapped the ideal glass ecosystem, defining key touchpoints, processes, enablers, and service enhancements.

- **Strategic Roadmapping:** Prioritized starting points of action and developed an implementation plan to guide CX transformation.

My Role

As Project Lead, I managed cross-functional teams in the planning, execution, and delivery of all milestones, ensuring strategic alignment.

- Partnered with the VP of Sales and Director of Customer Experience to align customer insights with business objectives.

- Led research planning and recruitment logistics, maintaining oversight of the project timeline and budget.

- Directed synthesis of research findings to develop value, delivering critical insights and actionable strategies.

- Developed a transformative framework, identifying six key areas for delivering delight, to drive organization-wide customer-centricity.

- Designed and facilitated collaborative workshops, crafting agendas, activities, and artifacts for remote and in-person sessions.

21

Transforming CX with Delight

Key Findings & Insights

Only 40% of customers felt their expectations were exceeded while others experienced an inconsistent, fragmented, and unreliable experience.

- **Gaps in the Glass Cycle:** Siloed tools, processes, and communications created inconvenient bottlenecks, limited access to glass, and resulted in significant delays to order fulfillment.

- **Limited Visibility to Inventory:** Customers struggled to accurately forecast inventory needs, resulting in uncertainty about whether the glass they plan to order will actually be available.

- **Evolving Customer Expectations**: A widespread adoption of digital technology and rise in automation commercial interactions has led to the consumerization of customer expectations, driving a demand for proactive, personalized solutions to anticipate and address potential issues throughout the glass cycle.

- **Scaling the Personal Touch:** A one-size-fits-all approach was no longer sufficient; customers needed tailored interactions that adapted to their unique and evolving business needs.

Mapping the Glass Cycle

A Framework for Delight
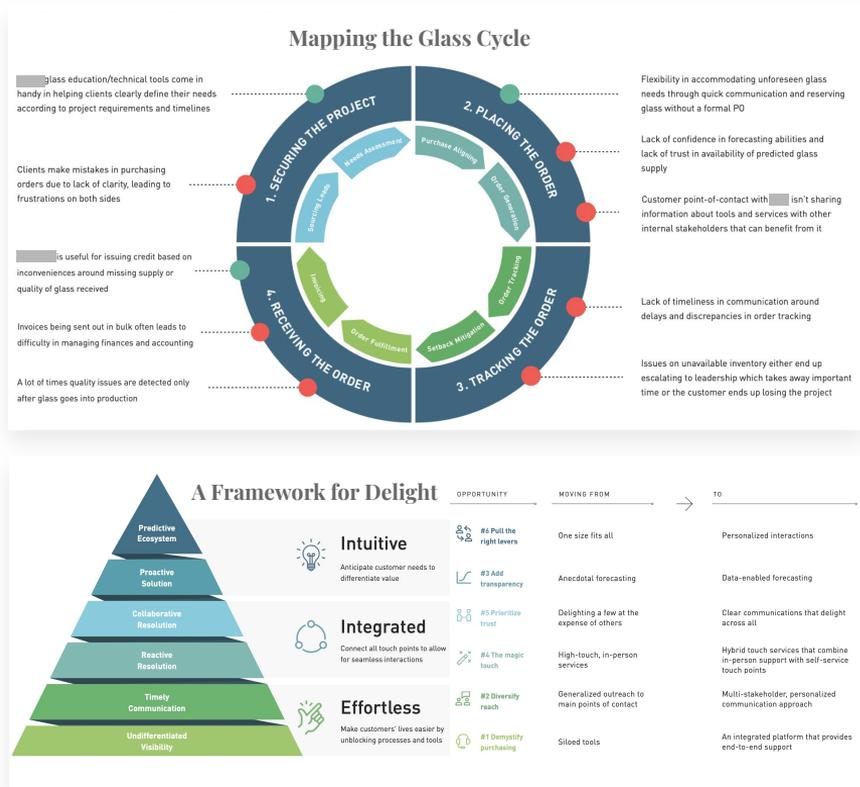
Transforming CX with Delight

Areas of Opportunity

We could consistently exceed customer expectations and unlock lifetime loyalty, by shifting from a satisfaction to delight mindset.

- **Unified Digital Transformation:** Develop an integrated 'phygital' platform that merges digital tools with human touchpoints, guiding customers through the entire glass sales cycle—from exploration to fulfillment—with ease.

- **Predictive Analytics for Proactive Service**: Implement data-enabled forecasting to effectively optimize inventory management and reliably anticipate customer needs for glass.

- **Personalized Customer Journeys:** Tailor experiences across segments by leveraging data-driven insights to deliver customized recommendations, targeted communications, and diversified reach.

- **Hybrid Service Model:** Blend high-touch, in-person support with low-touch, self-service solutions for flexible and responsive interactions that deepen customer relationships.

Reimagining the End-to-End Glass Experience

A **phy-gital platform that seamlessly integrates digital solutions with human support** to expand access, minimize bottlenecks, and streamline routines throughout the cycle of exploring, sourcing, acquiring, and processing high-quality glass.
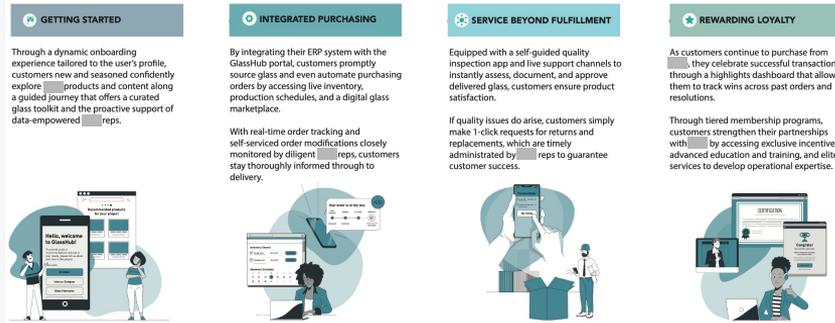
Building A Roadmap for Phygital Transformation

23
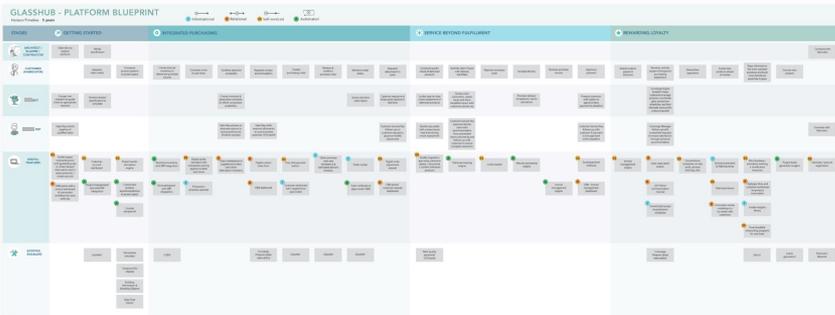
Transforming CX with Delight

Impact

- Establishing a shared understanding of the ideal glass cycle led to achieving strategic alignment across cross-functional departments, enabling them to work towards a unified vision of customer experience excellence.

- The client established an internal customer experience task force dedicated to executing the strategic roadmap and driving initiatives across pillars of cultural transformation, process redesign, and platform development.

- The delight framework laid the groundwork to implement revitalized loyalty programs designed to deepen customer relationships and increase retention.

Reflection

Challenges: The project scope expanded as we mapped customer interactions across the entire glass ecosystem, leading to a more comprehensive evaluation. Aligning cross-functional stakeholders was challenging, especially balancing diverse departmental priorities.

Outcome: Adapting our approach to the expanded scope enriched the final deliverables and amplified the project's impact. Persistent communication, iterative feedback, and collaborative workshops successfully rallied the organization around enhancing the customer experience.

The visual details of this project are confidential under NDA.

Bridging Online–Offline Purchasing Experiences

Streamlining omnichannel retail service for recreational FMCG consumers

Design Strategist, Propelland

Bridging Online–Offline Purchasing

Project Overview

A global recreational FMCG leader was facing a decline in direct-to-consumer (DTC) ecommerce sales due to new legislative restrictions on home deliveries. These restrictions impacted the company's ability to maintain strong online sales and their relationship with loyal customers, prompting the need for an omnichannel service to meet consumer demands, piloting with an insight-driven Buy-Online-Pickup-In-Store (BOPIS) model.

Methodology

Mixed methods research and service design to validate to validate the desirability, feasibility, and viability of an integrated BOPIS model.

- **Service Prototyping:** Crafted a BOPIS model with concept omnichannel touchpoints aligning to key value propositions and ensuring a seamless purchasing experience.

- **Concept Validation:** Conducted focus groups embedded with Qualtrics micro-surveys with 20 active e-commerce consumers to capture preferences, expectations, and challenges with BOPIS concept.

- **Business Strategy:** Evaluated the operational capabilities and cost effectiveness of implementing BOPIS at various US retail locations.

- **Pilot Program Design:** Mapped out the ideal BOPIS journey flow to appeal to target personas with validated and prioritized features.

My Role

As Lead Researcher, I directed the exploration and validation efforts and co-owned the strategy development for launching the BOPIS pilot.

- Facilitated cross-functional collaboration between client stakeholders across product, operations, legal, and marketing.

- Designed the research framework and validation plan.

- Managed focus group selection, recruitment, scheduling, logistics, and facilitation.

- Led synthesis of findings to develop target personas, refine concept touchpoints, and inform the activation of BOPIS pilot.

- Produced an internal marketing video to effectively socialize insight-driven recommendations to client stakeholders.

26

Bridging Online-Offline Purchasing

Built out detailed research plan and artifacts to gain approval from stringent marketing and communication constraints.

Our Methodology

We hosted five 75-minute focus groups to uncover three knowledge goals and asked them to rate six features based on how well it fits their purchasing routines.

Knowledge Goals

- How do ▮▮ **perceive the value for BOPIS** and is it compelling?
- What BOPIS concept features are **most appealing? Why** are these features prioritized over others?
- How does the preferred concept feature(s) **address lifestyle or routine pains and gains?**

Buy Online, Pick Up in-Store Potential Concept Features

- Buy ▮▮ with ▮▮
- Pick Up + Get Rewarded
- Subscribe to Pick Up
- One-Step Replenish
- Order Customization for Pickup
- Personal Cart Helper

Participation Process Flow

- ▮ propelland team
- ▮ database

Send email invite to filtered ▮▮ email database
- Filter customer email database by selected criteria
- Deploy email with NDA & screener link

Receive email invite to participate
- Overview of context and ask
- Participation conditions + incentive
- Instructions to take qualifying survey

Take survey via Qualtrics
- Respond to <5min qualifying survey
- Includes data privacy disclaimer

Assess eligibility
- Review responses to meet target participants
- Send email to confirm match

Receive confirmation email with link to NDA via Qualtrics
- Link to NDA
- Sign NDA + view propelland's privacy policy
- Auto-directed to Calendly upon completion

Pick time slot via Calendly
- Confirm with first name and email
- Select one of three available time slots
- Receive confirmation + reminder email a day before the session

Attend 75' session at scheduled time
- See Interview Guide + Assets for session details

Receive follow up email to redeem incentive
- Within 1 week

Focus Group Agenda

Overview + Warmup (15')
Provide research overview and ask participants to share a buy online for in-store pickup experience.
Goal:
Set expectations for session, familiarize participants and understand what a "good/bad" experience looks like.

Features Introduction (20')
- Present new features in sets of 3 and ensure participants have a clear understanding of each feature.
- Ask participants to select 1 preference from each set.
Goal:
Familiarize participants with program features and understand their preference for incentive and reordering.

Features Prioritization (5')
Ask participants to independently rate each feature based on fit to their preference and routine.
Goal:
Identify where features land on a preference spectrum for each participant.

Break (5')

Group Discussion (20')
Discuss reasons for prioritizing features and tradeoffs in the group.
Goal:
Uncover motivations and how features fit into their routines by facilitating a generative group discussion.

Reflection (5')
Ask for additional ideas or general thoughts.
Goal:
Validate willingness to participate/subscribe.

Preference Exercise

Exercise 1. Select one feature that is best fit for you.
- Order Customization for Pickup — Personalize your ▮▮ accessories online for in-store pickup.
- Pick Up + Get Rewarded Every Time — Free gift of your choice with every pickup order.
- Buy ▮▮ with ▮▮ — Mix and match ▮▮ products.

Next

Exercise 2. Select one feature that is the best fit for you.
- Subscribe to Pick Up Anytime — Pay a monthly fee to pick up ▮▮ products whenever and wherever you choose.
- Personal Cart Helper — Receive a personalized shopping cart based on your responses to a vibein quiz.
- One-Step Replenish — Reserve your last order for pickup with a single SMS.

Back · Next

ECOMM 2.0
Participants at a Glance (N=20)

Focus group participants provide insights into the perspective of ▮▮ that buy primarily through eCommerce.

Participants Characteristics
- eComm ▮▮ presented a **predisposition to purchasing online** and the comfort of receiving products at home.
- Participants leaned toward an **older age group, influencing openness** to added digital touch points with pick up.
- ▮▮ recruited were **incentive-motivated, affecting their appeal** to value propositions.

Purchasing Behavioral Traits
- eComm subscribers — 8
- Purchases ▮▮ products both online and in-store — 12
- Typically purchases 10 or more ▮▮ at a time — 10
- Have previously purchased ▮▮ products — 4

Geographic Distribution

Demographics

Gender
- 8 Male
- 12 Female

Age Group
- 1 25 - 35
- 8 36 - 50
- 11 50+

REYNOLDS + propelland

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27

Bridging Online–Offline Purchasing

Key Findings & Insights

While convenience was the primary value of BOPIS, translating to a timely, reliable, frictionless, and economical purchasing experience, it resonated different with each consumer persona.

- **Time Efficiency:** Crucial for working consumers, who valued quick and reliable pick-up experiences to fit their busy schedules.

- **Proximity and Ease of Access:** Essential for urban consumers, who preferred picking up at stores located along their commute routes.

- **Flexibility and Visibility:** Important for sporadic consumers with unpredictable purchasing habits, who needed adaptable options and clear inventory.

Areas of Opportunity

We designed a pilot BOPIS program with utilitarian incentives and personalized brand affinity enablers, centered around four key design criteria:

- **Minimal Behavioral Change:** Closely mirror the BOPIS experience to the existing online ordering process, reducing friction and driving omnichannel adoption.

- **Proximal Location Selection:** Position pickup locations within 2 miles of high-value consumers' commuting routes to maximize convenience.

- **Timely Fulfillment:** Ensure order readiness within 72 hours to meet expectations for speed and reliability.

- **Guaranteed Availability:** Provide real-time inventory tracking and informed updates to ensure preferred product availability at pick-up, maintaining consumer trust.

Bridging Online–Offline Purchasing

Findings & Insights

Bridging Online-Offline Purchasing

Research plan and artifacts

ECOMM 2.0

Critical Factors for BOPIS Activation

The BOPIS program should meet ANC criteria, while incentives and brand affinity enablers will optimize their experience and contribute to more valuable customers.

Design Criteria
- Minimal behavioral change to online ordering experience.
- Pickup location no more than 2 miles from their routine.
- Product fulfillment within 72 hrs of ordering online.
- Guaranteed availability of preferred product upon pickup.

Incentives
- Faster product fulfillment compared to home delivery.
- Easy to redeem discounts.
- Discounts or promotional items exclusive to BOPIS.
- Utilitarian promotional items.

Brand Affinity Enablers
- Points-based rewards program.
- Potentially earn retailer reward points for VuseVapor.com purchases fulfilled by the retailer.
- Personalized ordering experience aligned with their product replenishing routines.
- Product accessory customizations aligned to ANCs interests.

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Pilot Requirements + Key Features

VUSEVAPOR.com ANCs expect the following outcomes and features in the BOPIS pilot.

Must Have Experience
- Minimal behavioral change to online ordering experience. *Frictionless*
- Pickup location no more than 2 miles from their routine. *Frictionless Timely Economical*
- Product fulfillment within 72 hrs of ordering online. *Frictionless Timely Reliable*
- Guaranteed availability of preferred product upon pickup. *Reliable Economical*

Key Features

Pre-Purchase	Purchase	Post-Purchase

Tailored Exposure Receive tailored messaging and incentives through email/SMS of pickup availability at a Vuse store near existing Vuse ANCs.

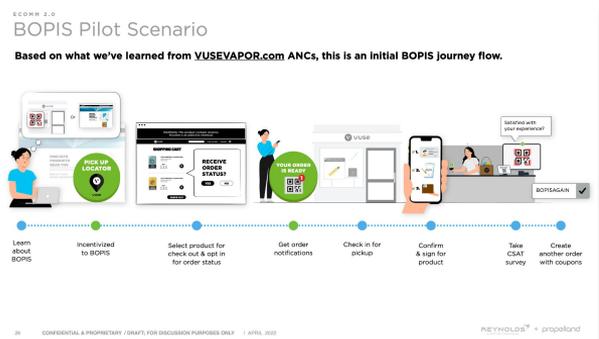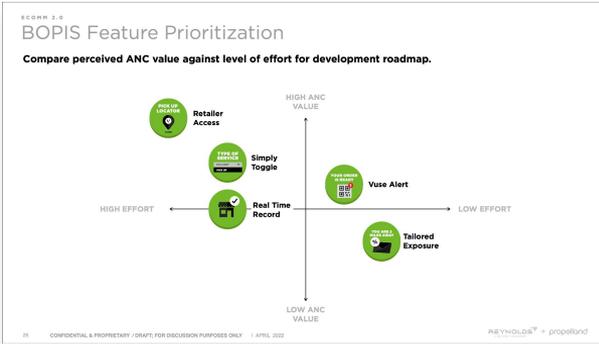**Simply Toggle** BOPIS any online order by simply toggling delivery method from shipping to pickup.

Real Time Record Visibility into real time inventory availability at pickup locations during ordering.

Retailer Access Activate retail partners most centrally located to ANCs' other lifestyle routines.

Vuse Alert Receive timely email/SMS on order status and product availability.

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ECOMM 2.0

BOPIS Feature Prioritization

Compare perceived ANC value against level of effort for development roadmap.

- Retailer Access
- Simply Toggle
- Real Time Record
- Vuse Alert
- Tailored Exposure

HIGH ANC VALUE — LOW ANC VALUE — HIGH EFFORT — LOW EFFORT

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ECOMM 2.0

BOPIS Pilot Scenario

Based on what we've learned from VUSEVAPOR.com ANCs, this is an initial BOPIS journey flow.

PICK UP LOCATOR — RECEIVE ORDER STATUS? — YOUR ORDER IS READY — BOPISAGAIN

Satisfied with your experience?

| Learn about BOPIS | Incentivized to BOPIS | Select product for check out & opt in for order status | Get order notifications | Check in for pickup | Confirm & sign for product | Take CSAT survey | Create another order with coupons |

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ECOMM 2.0

BOPIS Pilot Learning Agenda

Based on what we've learned from VUSEVAPOR.com ANCs, this is what a BOPIS pilot program journey could look like and what we could further learn.

	Learn about BOPIS	Incentivized to BOPIS	Select product for check out & opt in for order status	Get order notifications	Checks in for pickup	Confirms & signs for product	Takes CSAT survey	Create another order with coupons
Questions	How did ANCs learn about the service?	What incentives were most compelling to eComm ANCS?	What were most popular quantities and items that ANCs ordered for BOPIS?	What was the average size basket for BOPIS orders?	What level of visibility are ANCs looking for in their BOPIS experience?	How long do ANCs wait to pick up from when order is ready?	How many orders are completed via BOPIS (compared to what is ordered)?	Are ANCs satisfied with the BOPIS experience?	Are ANCs using the service more than once during the pilot?
Data	Click and scan rates	A/B/C incentives testing	Sales data	Sales data	A/B message testing	Check in time on tablet	Sales data	Survey/NPS	Promo code

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30

Bridging Online–Offline Purchasing

Impact

- The pilot successfully validated the BOPIS model, accelerating online order fulfillment by 80% and boosting ecommerce conversion.

- Insights from the study informed plans for a broader BOPIS rollout across multiple markets, shaping the client's omnichannel strategy and driving future retail innovations.

- The project highlighted the need for continuous innovation in response to evolving regulatory changes, providing a scalable framework for future omnichannel initiatives.

- By addressing the needs of diverse consumer needs, the BOPIS model re-engaged loyal customers, boosting basket size, purchase frequency, and customer lifetime value.

Reflection

Challenges: Navigating the complexities of integrating online and offline channels while ensuring a consistent customer experience was a significant challenge. Additionally, stringent marketing regulations and varying regional legal requirements required close collaboration with compliance teams, adding layers of complexity to the project.

Outcome: The success of the BOPIS pilot underscored the importance of agility in service design, particularly in adapting to regulatory constraints and consumer expectations. The project provided a robust framework for scaling the BOPIS model and laid the groundwork for ongoing innovation in the client's omnichannel strategy.

The details of this project are confidential under NDA.

Empowering Organizational Data Fluency & Literacy

Democratizing data access and ownership to improve strategic decision-making

Senior Design Strategist, Propelland

Empowering Org Data Fluency & Literacy

Project Overview

A multinational beverage conglomerate was transforming their retail data management experience with an enhanced global data lake and new self-service tools, aiming to make marketplace performance measurement more accessible and valuable to internal members and regional partners. This required comprehensive training and support to ensure widespread awareness and adoption.

Methodology

Multi-phase discovery and strategy to codify, plan, execute, and scale change management to foster data access continuity and confidence.

- **Stakeholder Interviews:** Evaluated high-level enterprise-wide and function-specific needs, delineating the current vs. future state of data usage across key user groups.

- **Communication Strategy:** Developed messaging frameworks and guidelines adaptable across various user segments and communication channels, ensuring clarity and consistency.

- **Content Creation & Design:** Crafted visual assets and informative content, including tailored training materials, laser-focused communications, and curated touchpoints.

My Role

I led the discovery phase and owned the shaping of all communications materials to align with the strategic vision for change.

- Led investigations into current interactions with and use cases for retail data, identifying pain, opportunities, and needs.

- Designed comprehensive outlines and layouts for communication assets, ensuring that the content was compelling, informative, and aligned with organizational goals.

- Oversaw the creation and refinement of messaging, visual aids, and training materials to resonate with diverse audiences.

33

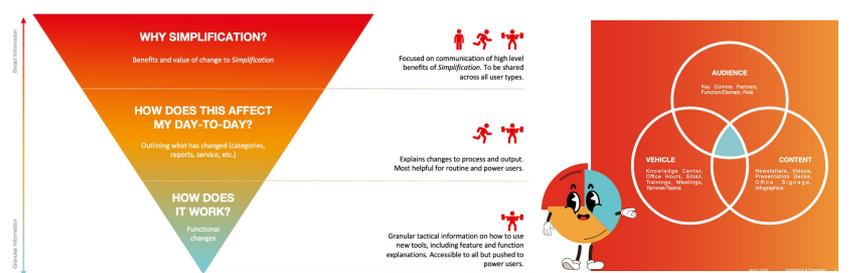# Empowering Org Data Fluency & Literacy

Key Findings and Insights

Our discovery highlighted the need for a clear, compelling, and balanced communication strategy tailored to varying levels of data fluency, reducing the risk of change fatigue.

- **User Segmentation:** Mapped out change journeys for light, routine, and power users based on their frequency and depth of data usage, tailoring communication and support strategies effectively.

- **Balanced Communications:** Balancing a mix communications delivered directly to users vs. accessible on-demand at a central hub.

- **Support without Overload:** Curated extensive resources catered to all users without overwhelming those less dependent on data in their day-to-day.

- **Simplifying Content:** Translating complex, technical instructions into clear, easy-to-grasp content to ensure widespread adoption.

Mapping Change Journeys for Core User Segments
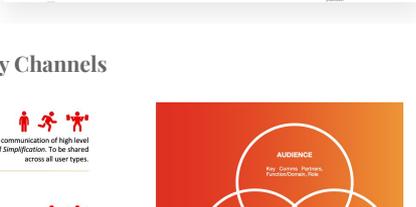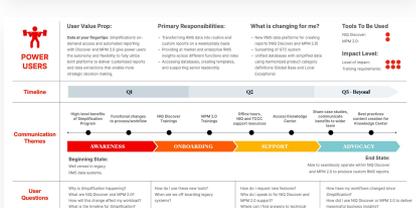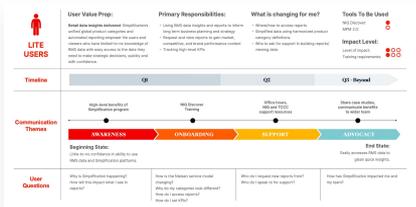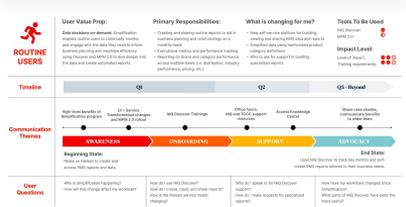

Aligning Audience, Content, and Delivery Channels

34

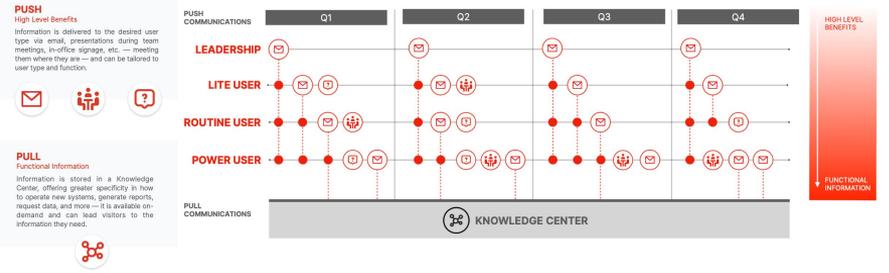# Empowering Org Data Fluency & Literacy

Areas of Opportunity

- **Modular Toolkits:** Developed comprehensive, customizable toolkits for Operational Leaders to guide their teams through the transition with confidence, ensuring they had the resources to communicate timelines, implications, and instructions effectively.

- **Customized Communication Channels:** Combined push communications tailored to each organizational unit (cadenced emails and notifications) with pull resources available to all users (on-demand guides, presentations, and videos in a Knowledge Center).

- **Iterative Feedback Mechanisms:** Integrated micro-surveys within communication channels to continuously gather user feedback and iteratively refine of training materials, ensuring ongoing relevance and effectiveness.

- **Multimedia Messaging:** Leveraging a range of emails, infographics, and videos—enhanced by a mascot—to boost user engagement with new content.

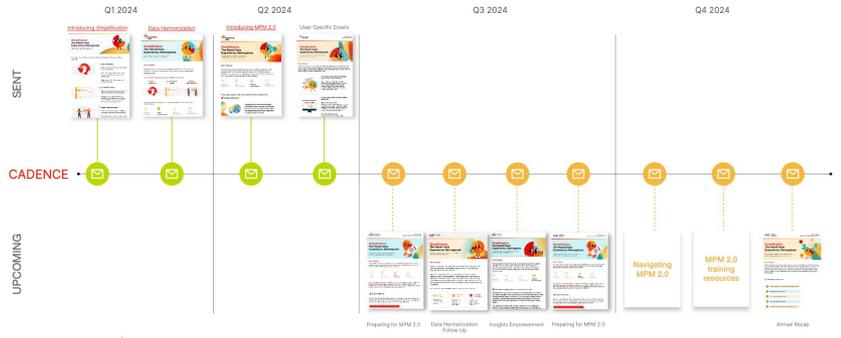Building a Service Blueprint for Communication & Training Rollout
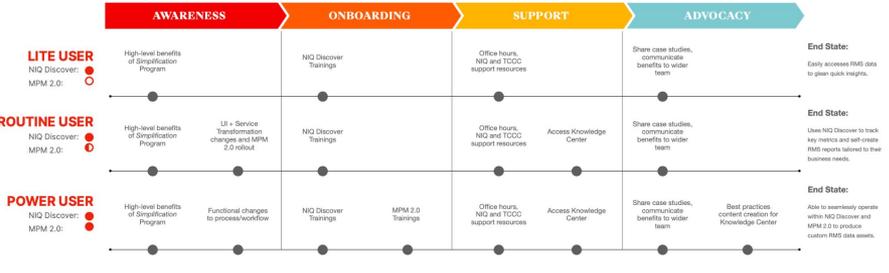
Balancing Communication Channels Across User Segments

35

Empowering Org Data Fluency & Literacy

Comprehensive communication toolkits supported OU Leaders in instilling clarity and confidence in their teams through the transition.

Enterprise-wide emails and cadence

OU-specific email library

Accessing Discover	Data harmonization follow up	Parallel period guidance	Timeline & expectations	MPM 2.0 launch overview
Outlines the benefits of NIQ Discover, key features and how to access the platform	Details the specific considerations, changes and action items for OU's	Describes the parallel period, required actions and timelines	Provides additional information and timing for each *Simplification* initiative and the action steps required	Announces the launch of MPM 2.0 and provides access to the platform

Knowledge hub - About Simplification

Assets to explain the basic premises of *Simplification* and how it comes to life across the organization.

About Simplification Video

MPM 2.0 video

Discover Case Study

About Simplification infographic

Simplification user journeys

Knowledge hub - Support

Information on who to reach out to for support and how to solve common challenges.

Data harmonization FAQ

Overall Simplification FAQ

Guide to Client Services Online

Finding support in NIQ Discover

MPM global data standards

NIQ regional lead contact information

Simplification high level calendar

TCCC OU lead contact information

36

Empowering Org Data Fluency & Literacy

Impact

- **Empowering Leaders:** Equipped Operational Leaders with modular toolkits, enabling them to confidently communicate change timelines, implications, and instructions to their teams.

- **Cultural Shift to Data Fluency:** Fostered a self-sufficient, data-savvy culture by empowering employees to independently access retail data, democratizing informed, strategic decision-making.

- **Foundation for Future Transformations:** By tailoring support throughout the transition, we laid the groundwork to facilitate future technological transformations seamlessly, ensuring smoother transitions and greater adaptability across the company.

Reflection

Challenges: Overcoming employee hesitation due to a history of unsuccessful implementations required a thoughtful strategy to instill trust in the new retail data experience.

Outcome: Struck the right balance between technical details and accessible language, ensuring the communication was informative yet comprehensible. The use of micro-surveys allowed for continuous refinement of training materials, resulting in a more engaged and knowledgeable workforce.

Thank you
for considering me!