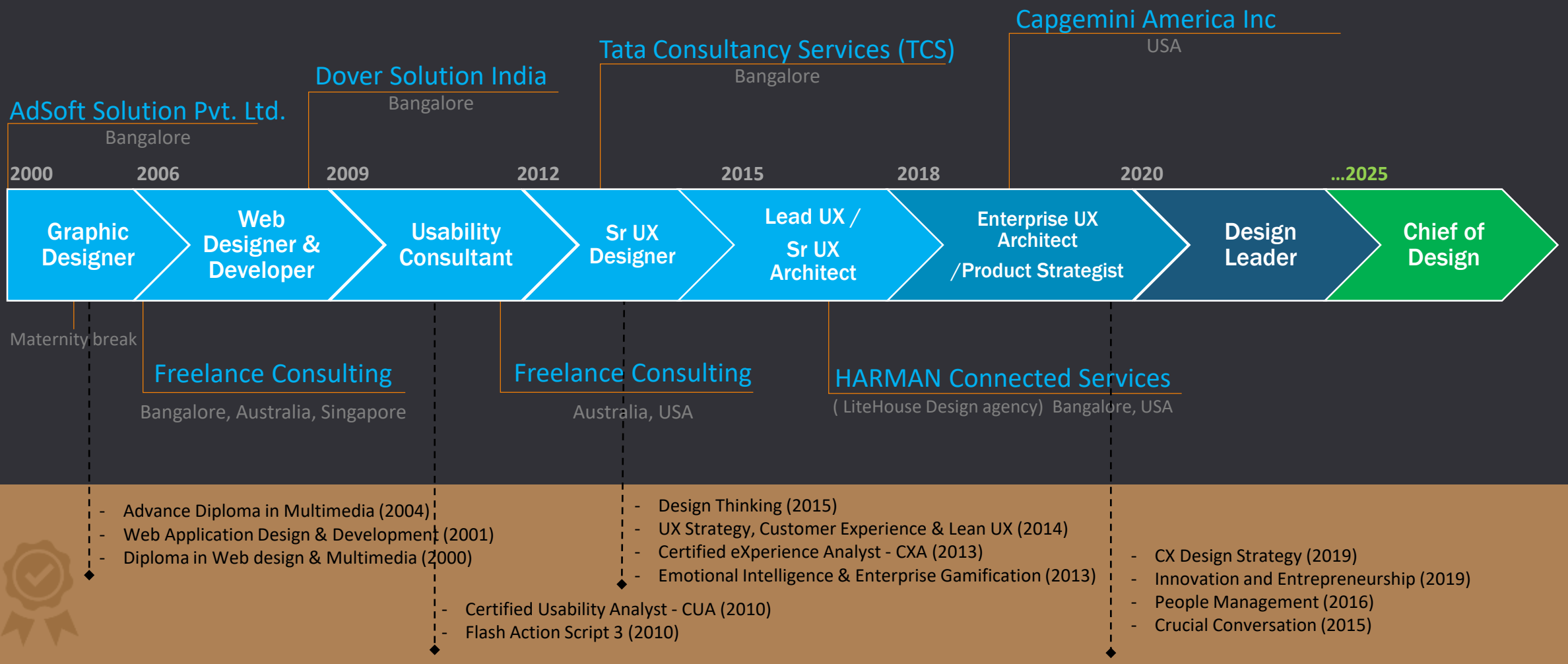
UX Portfolio of Mira Bhatt

Mira Bhatt (CUA™, CXA™)
Email: mirabhatt@yahoo.com
Mobile: +1 425 435 1635

Work Samples

- Pick in the past dip in the future
- Contribution to UX Practice
- Design Samples
  - UX Management, Strategy & Architect
  - UX Design & Wireframes
  - Interface Designs
  - Design Evaluations

Pick in the past, dip in the future



Contribution to UX Practice...apart from hands-on UX work

UX PROJECT PROPOSAL & PRESELL

- Manage pre-sell proposals, PoC, RFPs for UX and ADA work
- Onsite / offshore Customer visits & workshops
- Detailed Design activity planning and UX scope definition for projects
- Created UX, UI & FED Estimation templates
- Rate Negotiations & GM Calculation

TALENT GROOMING & UX MANTORING

- Provide trainings for onsite /offshore activities
- UX "roles & responsibility" Conflict management
- Plan UX meets & trainings for latest trends
- UX Goals and KRA setup & tracking
- Provided trainings on Design Thinking, User Psychology, Gamification, UX Discovery Planning, Lean UX

UX PROCESS IMPROVEMENTS

- "UX in Agile" awareness program with Scrum teams, product owners and BAs
- Design System and Asset Portal conceptualization
- UX Delivery Handshake & Kick-off meeting protocols
- UX tools & Template creations
- Usability checklist & training for QA teams

UX EVANGELISM & INSTITUTIONALIZATION

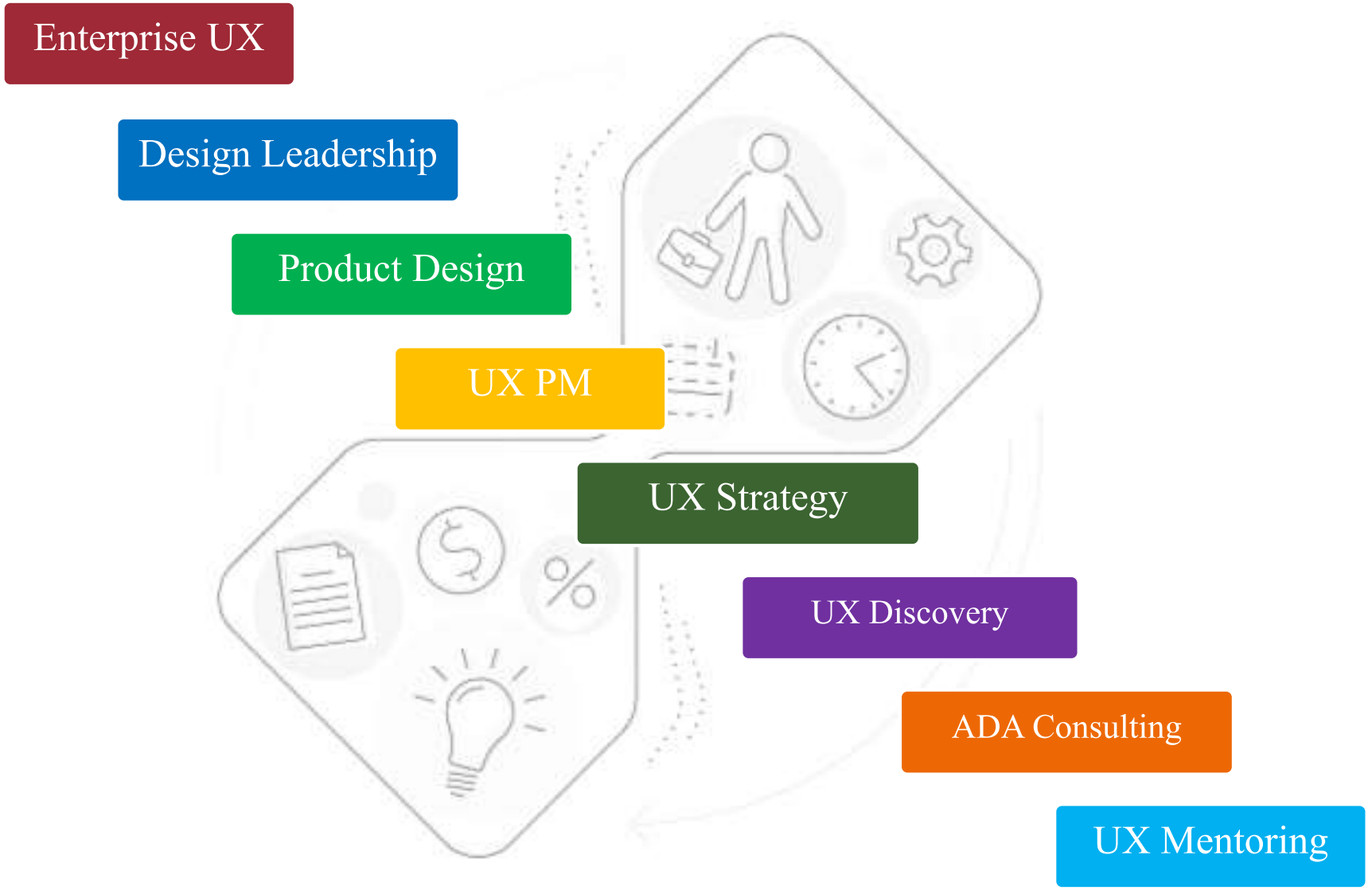
- UX Leadership Framework
- Accelerated Solutioning and UX awareness workshops with Product and Technology teams
- Customer Experience lab design and UX CoE Roadmap
- UX Studio & Scoreboard
- Strategy workshops with Leadership

"Keep one eye on the Big Picture, other on the Pixel"

Won "HARMAN Inspired Tech Challenge" for innovative idea of
Empowering the next generation to realize their possibilities through the power of Music, Technology and Services.

Recognized by Capgemini as a key contributor in a large Digital Transformation project and showcased on Talent portal

UX Management, Strategy & Architect



Enterprise Platform Design- as a Chief Design Strategist

Define and execute platform upgrade strategy to enhance Customer Experience for a global Financial Services technology provider

Goal: A legacy wealth management & treading platform to be redesigned to cater smatter, productive, unified experience along with newer frontend technology. The UX standards has to be defined so that 18 products under the umbrella can utilize the experience approach and Design Language to reflect consistent experience.

Create Strategic CX approach, Institutionalize Customer Centricity and evangelize UX processes within Business, Operations, Technology and Customer teams

Define Strategy & Design Culture

- Workshops with “C” Suits to define strategic CX goals
- Establish UX vision across multiple Products / Teams / Clients
- Implement Design Thinking at a group level

6 Weeks Discovery, Institutionalize Customer Centricity

Research, Planning & Estimation

- UX Processes & Design activity plan
- UX Scope definition and prioritization
- Define Users’ Ecosystem to identify touch point & pain points
- Workshops & interviews with Business, Operations and Technology groups

Need Analysis, User Ecosystem Blueprint

UX Framework & Evaluation

- White boarding, Wireframes & clickable Prototypes
- Information Architecture & Role based UI
- Design standards and component Library for Reusability and adoptability

2 Pilot projects, 200+ wireframes

Adoption & Improvement

- White labeling strategy
- Basic ADA verification
- UX checklist and scenario based consulting
- Retrofit learnings to UX Framework
- Plan governance for ongoing activities

Component Library, UI Wrappers, Unified Design Language

Established Design Function across Investment Services vertical

Investment Product Design- as a Chief Design Strategist

"Investor Experience Program" for self-servicing and Portfolio management on Mobile & Desktop with ADA 2.1 AA conformance

Goal: A white-label investment product for portfolio management to be created for investors on iOS, Android and Desktop which should be ADA conferment. Design Investor persona based dynamic UI to provide different experiences considering their tech savviness, age group and investment styles.

Launch the MVP in 4 months for 100 Advisors & 2000 Investors for a global event. Build and lead sustainable Design team to deliver multiple UX projects in parallel

Research, Planning & UX Team setup

- Conduct Accelerated Solutioning Workshops (AECs) with Executives
- Define Program Goals and Roadmap
- Market & Competitive Research
- Set Up in-house UX Team, competing against a design agency

2 weeks of Workshops
Team of 6 Designers

Lead Cross-Functional Teams

- Lead the key, high visibility program for a global event with a very short timeline
- Manage Onsite-Offshore team of UX, FED, ADA, Android, iOS, MuleSoft and Testing
- 2 Agile teams for Designer and Developers
- Coach the team for productivity and quality

Project Team of 22
Budget $9M

Design & Evaluation

- Define User Ecosystem, Roles, Personas, user flows and Information Architecture for mobile and desktop
- Create strategy for Investor Onboarding, AB testing and User migration
- Product review and customer demos

Prototypes for iOS, Android, Desktop
400+ wireframes

ADA Conferment "WCAG 2.1 AA"

- Assessment and Remediation of ADA for Desktop and mobile (iOS & Android)
- Set up, train and lead ADA specialist for Design, development and testing
- Establish ADA Color standards for dynamic use in Asset classes across the platforms

ADA conformant style guide
Accessible Color Palette for Charts

Successful MVP launch in 16 weeks

New UX projects from other groups for in-house UX team

Advisor Admin platform as a Product Strategist

Need a create advisor consul for governance of product packaging and features

Goal: Design a consul to create firm based branding, license based product packaging and differentiated investor persona based experience of Investor apps. Platform to be used by 500+ firms, 20K+ Advisor Admins and 1M+ Investors. Design secure Texting tool (desktop, iOS, Android) for Advisor – Investor communication

Create Omni channel experience with White labeling strategy

Brainstorming and workshops

- Hosted Focus groups and Accelerated Solutioning workshops
- Establish UX vision & road map for the product
- Research competitors and legacy systems

3 weeks of workshops and research

Strategy and Planning

- UX Strategy & Design activity plan
- MVP Scope definition and prioritization
- Resource, Schedule and Communication plan
- Design Workshops within Business, Operations and Technology groups

MPV definition
Design Team of 6

UX Design and Iterations

- Define Users' Ecosystem to identify touch point & pain points
- Advisor and Investor Persona creation
- Information Architecture & Role based UI
- White boarding, wireframes and prototype design

3 Design iterations
80+ wireframes

ADA & Usability testing

- Basic ADA verification
- UX checklist and scenario based Usability Testing
- Retrofit learnings into design
- Design validation after data integration
- Development support

Established ADA standards for adoption

Faster Time-to-market for new customizations
Easy adoption for existing customers

Market Research product -as a Lead UX Architect

Data visualization Dashboard for IRI-

Top Retail Market Research Company

Highly interactive **dashboard to be analyzed and re-designed for Data Visualization** and Productivity. Need to make it **scalable and responsive** to any device (mobile to a large screen TV) and create **design guidelines to standardize the product** across platforms.

Product to be showcased in Global Growth Summit 2017
Critical customer expectations with very short delivery deadlines

Project Proposal & Presell

- Customer visits
- Pre-sell Presentations & case studies presentations
- Proposal & Negotiation
- GM Calculation

14 Weeks plan
$125,000

Project planning & Estimation

- Detailed Design activity plan
- Resource Plan & Schedule
- UX Scope definition
- Team Setup & Communication plan

Hybrid Model
Team of 11

UX Discovery & Team Management

- Onsite Discovery & User research
- Weekly demo & status updates
- Lead team of UX Researcher, UX Designer, Visual Designer, BA, FEDs, QA

48 Wireframes
3 VD Iterations

UX Development & Testing

- Handshake with Backend integration team
- UI & Usability testing
- UI assets & component creation
- Customer support & handover

Custom component Library & UI Wrappers

Happy Customer & a new project engagement

Document Management Platform - as a Lead UX Architect

Enterprise product to be re-created for a Document Management Company – Merrill Corporation

BUSINESS GOAL : Being able to host 70+ document portals and quickly set up a demo site for its client **with custom branding, layout and theme**. Stream line the maintenance of multiple Instances of custom product.

Created a configurable, multi-tenant, single platform with Guided User Experience using SiteCore and Sharpoint technology

Project planning & Estimation

- Detailed Design activity plan
- Resource Plan & Schedule
- UX Scope definition
- Team Setup & Communication plan

2 Phase approach
5 Months MVP + 9 Months Development

UX Discovery & Workshops

- Led Onsite Discovery
- Informal user research
- Gap Analysis & Competitor Analysis
- Information Architecture
- CX Strategy and Roadmap

Agile Model
Team of 8 designers & FED

UX Design & Development

- Rapid Prototyping & Wireframing
- Informal Usability Testing
- Handshake with SiteCore and SharePoint integration
- UI assets & component creation
- UI and demo support for customer Implementations

300+ Wireframes
Custom CSS Library

Enabled engineers to create Demo sites over a cup of coffee

Product reviewed by Microsoft and appreciated for its User Experience

Digital Experience transformation as a lead Experience Strategist

Leading UK based local search and advertising specialization company needed to reimagine their customer experience

Business Goal : After merger, re-align focus and resources of the company to **maximize returns and digital growth** by a **fresh customer experience** for End users, Business owners and Sales people.

Research

- Market Analysis
- Digital Trends Research
- Roadmap analysis
- Social media presence

3 Weeks, team of 4

Actions & Workshops

- Digital Component landscape Design
- Revenue contribution & Design ROI
- Customer Segmentations & prioritization
- Persona creations & Customer Journey
- Cross functional Workshops

“3 Box Approach” & Leadership workshops

Recommendations

- Product Localization Platform
- Hyper local & Proximity Marketing
- Analytical platform + Salesforce
- Mobile first Approach
- Command Center Design COE

Experience Design Roadmap 14 Months, 28 members

Testing and Licensing product - as a Lead UX Architect

Enterprise solution to host Licensing needs of California based National Testing and Licensing organization - PSI

USER GOAL : **Personalized, Intuitive, consistent Experience** to Search, Register, Pay and Schedule a licensing test from any device

BUSINESS GOAL : **Redesigned the experience architect** of multiple acquired products and provided a single consistent experience **with White labeling and Globally scalable, Responsive** product to cater to multiple international markets, which adherences to 508 and WCAG compliance.

The solution to be tested by integrating it with **Amazon Web Services**

Project Proposal & Presell

- Customer visits
- Presentations & case studies
- Proposal & Negotiation
- GM Calculation

2 Phases
$ 235K + 95K

Project planning & Estimation

- Detailed Design activity plan
- Resource Plan & Schedule
- UX Scope definition
- Team Setup & Communication plan

Agile Model
Team of 9

UX Discovery & Workshops

- Led Onsite Discovery of 5 weeks
- Eco System creation
- Globalization / Localization Strategy
- Gap Analysis & Competitor Analysis
  Information Architecture

80+ Wireframes
3 VD Iterations

UX Design & Development

- Rapid Prototyping & Wireframing
- Informal Usability Testing
- Handshake with Backend integration
- UI assets & component creation
- UI and demo support

Custom component Library & UI Wrappers

Appreciation by AWS & CSET of 4.6 / 5

ROI Analysis for UX Modernization of a BFSI Giant

Redesigning a legacy desktop application
Powering 600+ Credit Unions

For applications where usage rates are very high, saving a few seconds on a screen can mean quantum leap in returns. Estimated the ROI of using UCD process for – Productivity, Performance, Reduced cost of training

CREDIT UNIONS VISITED	WORKSHOPS	UXR PARTICIPANTS	RESEARCH SESSIONS
FIVE	THREE	35 PEOPLE	45 HOURS

$ Saved for Leading Airlines

16,560 Hours saved

X $38 hourly salary of tellers

Average $ saved for Episys Quest

629,000 $ saved per year

X 93 clients (Over $1B in Assets)

$ 58.5 M
/ Year

UX Solutions

User Centered Design

Information Architect

Gamification & PET

User Research

UX Workshops

Responsive Design

Wireframes

Usability Testing

iPad App – Wealth Interactive

Advisors application to reach affluent customers “Where They Are” and give business visibility. Customers can review the portfolio and perform self service on the move. Advisers provide financial advices based on the portfolio performance, trends and predictions

Experience Design of the application was featured as a USP of the app and later customized as a Product

- **Product conceptualization**
- **Data Visualization of Portfolios**
- **Gesture based drilldown of information**
- **Gamification & PET design**
- **Information Architecture**
- **Interactive Wireframes & Prototypes**

Appreciation for User Experience of the product by top leadership of TCS

iPad App – a Swiss leading wholesale reinsurance provider

Claims, Accounting and Liability Management (CALM) tool monitors and shares financial information with internal and external stakeholders such as Client Markets, Underwriters and Brokers.

Customized graphs with gesture based drill down feature

- **Data Visualization of Re-Insurance statistics**
- **Gesture based drilldown of information**
- **Gamification & PET design**
- **Information Architecture**
- **Interactive Wireframes & Prototypes**

Donation system for a group of collages

Web based application for group of Schools, Colleges, Educational institutes to raise fund and donation to run several programs to help the people who are in need.

- Donor Management – Identified, Volunteered, New Donors, Repeat Donors (Actual v/s Projected) & Most Viewed, Active and Inactive campaigns
- Promotion – Starts date + End date, Total Promotion Sent, Donation Originated, Emails Returned, Users opted out
- General Statistics – How much donation raised till now, Raised in the past year, Raised by different medium, like Mobile, Credit Card, Bank Cheque
- Performance Graph – Showcasing monthly progress over the predefined goal for the particular college.

- **Data Visualization of donation statistics**
- **Promotion analytics and performance prediction**
- **Information Architecture with simplified Navigation**
- **Personalized dashboard**
- **Interactive Wireframes & Prototypes**

The concept of "Donameter" was a hit and made the campaign managers to raise their bar !

PoS System – iVend Retail By CitiXsys

iVend Retail (iVend) is CitiXsys' flagship Retail platform that provides a gamut of solutions across the cross-section of Retail industries with a global customer base

-Legacy system with poor user experience

-Not available across mobile and tablet devices

The application has a dynamic run time GUI. This gives the retailer the freedom to customize their very own personalized POS templates

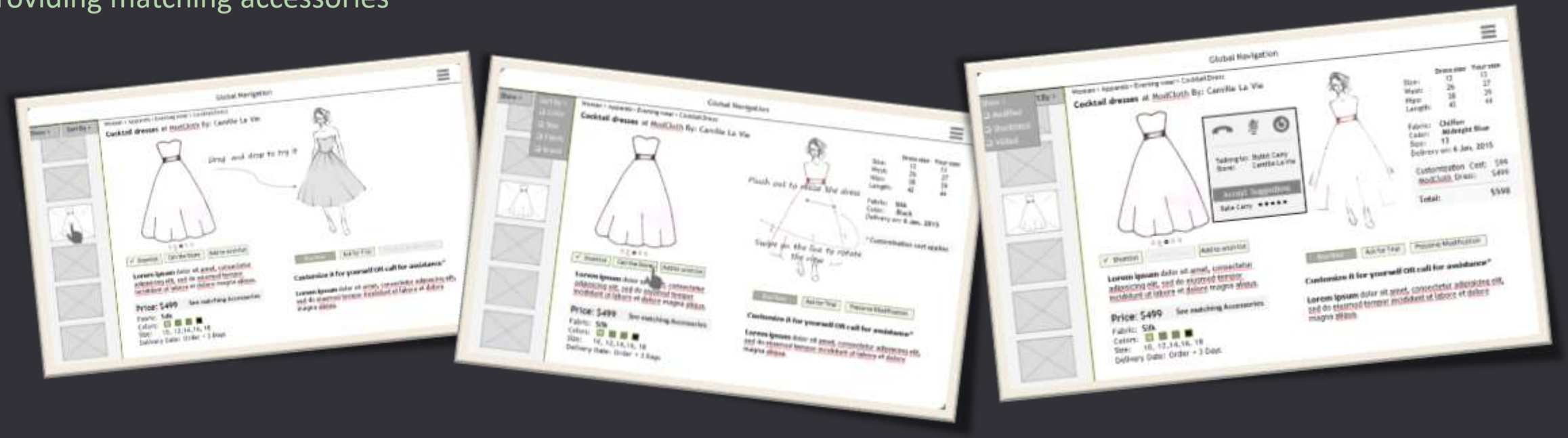
- **UX Discovery**
- **2 Phase Design approach**
- **Contextual Inquiry & guerrilla testing**
- **PoS Template Widgets Wireframe**
- **Gamification**
- **Information Architecture**
- **Interactive Wireframes & Prototypes**

iPad shopping app for Fashion brand –Augmented reality

To sustain and increase digital revenue after a drastic change in luxury e-com landscape, launching this iPad app for their HNI customers is a game changer. This app should provide best user experience, customization option, customer service and leverage social media connection.

Eliminated competition by adopting “Blue Ocean Strategy”.
Re-introduced the app with Augmented reality for apparels’ online trial and alteration, online customer assistance over VoIP and upsell by providing matching accessories

- **Product conceptualization**
- **Gamification & Augmented reality**
- **Micro-interaction design**
- **Information Architecture**
- **Interactive Wireframes & Prototypes**



Responsive App for a Retails online Shopping Portal

"Shopping Portal" is struggling to keep up with market due to loads of data/information dumped on the website homepage but it is difficult to get to what the users really require

- Created themes and rules for dynamic content in backend system
- Focus on Navigation and Presentation
- Speed access to result by providing filtering mechanism
- Provide user's "Search history" to reduce memory load and enable quicker access of information

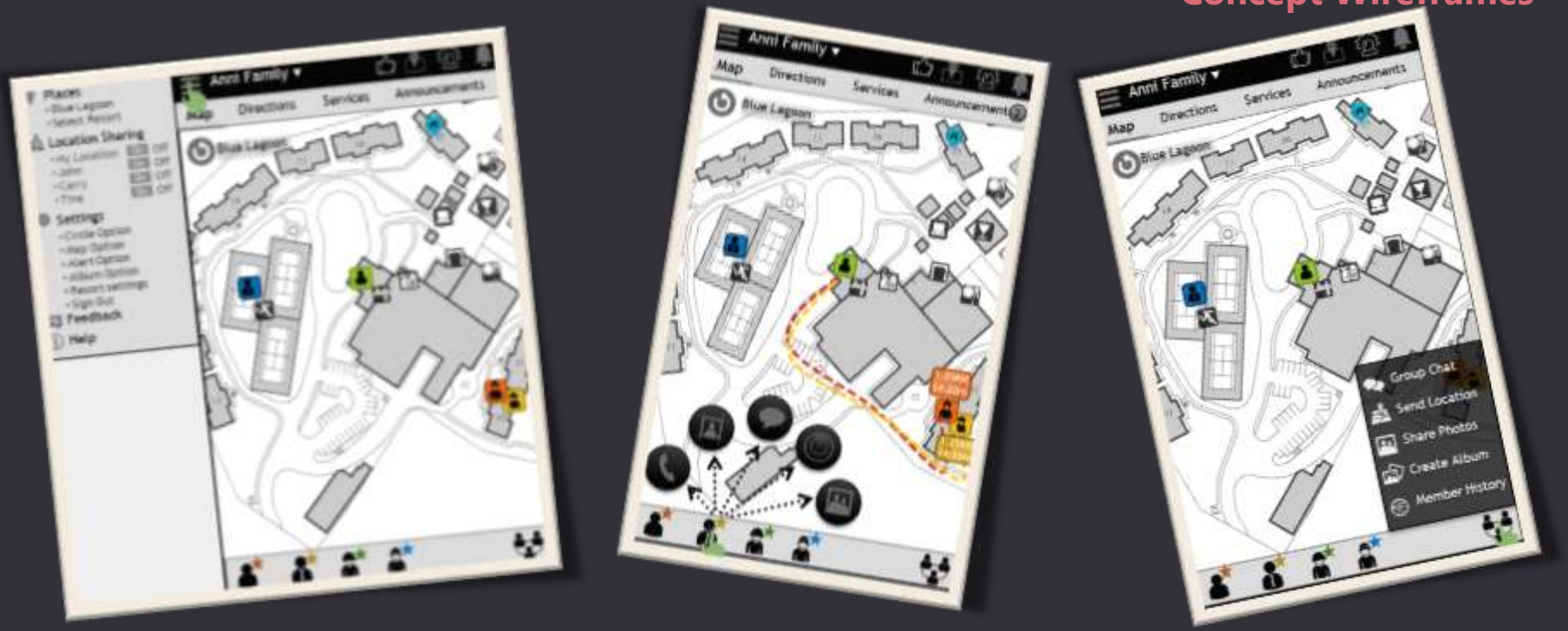
- **Experience Architect**
- **Personas**
- **Heuristic Evaluation & Market research**
- **Information Architecture**
- **User flows & Task flows**
- **Interactive Wireframes & Prototypes**

IoT based Concept App – Leading global resort chain

Family vacation app :

- Wearable devices for kids – connected with parent's phones
- Application to track your child real-time while on vacation and parents can have peaceful couple-time
- Parents and children to communicate back-and-forth
- Resort facility promotion, Customer engagement and retention

- **Product Conceptualization**
- **Customer Experience Journey**
- **Beacon based location guidance**
- **Personas & Scenarios**
- **Task flows**
- **Concept Wireframes**



Fire Station –ERP system redesign

ERP system of a Fire station in the US, to be redesigned considering Fire fighters' mindset to increase user efficiency and prevent errors while capturing data, before or after the fire incident.

Standardize the app UI, create templates and establish design guidelines for designers, developers and QAs across the vertical. Business used these guidelines as implementation check lists.

- **Experience Architect**
- **Heuristic Evaluation & Market research**
- **Gamification & PET design**
- **Information Architecture**
- **User flows & Task flows**
- **Interactive Wireframes & Prototypes**

Fraud management system for a US healthcare segment

Interactive Dashboard for insurance agents to analyze case details and assign / re-assign the case to relevant agents

Provided improved navigation, information analysis, quick references and aesthetically pleasing interface

- **Experience Architect**
- **Data Visualization of case statistics**
- **Information Architecture with simplified Navigation**
- **Personalized dashboard**
- **User flows & Task flows**
- **Interactive Wireframes & Prototypes**

Advisor App – Multinational financial service providers

Facts and figures at your fingertips: It gives you quick information about your investment

Extra reassurance: confidently discuss your wealth with your financial adviser because you'll have all the facts and security you need

Approval of key transactions electronically, e-signature, reduce paperwork, while seamless processing and faster valuations and approvals.

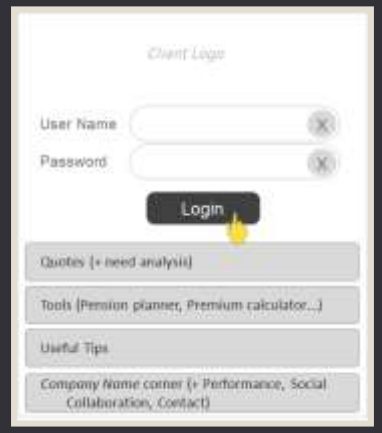
- **Product Conceptualization**
- **User Research & Interviews**
- **User flows & Task flows**
- **Interactive Wireframes & Prototypes**
- **Usability Testing**

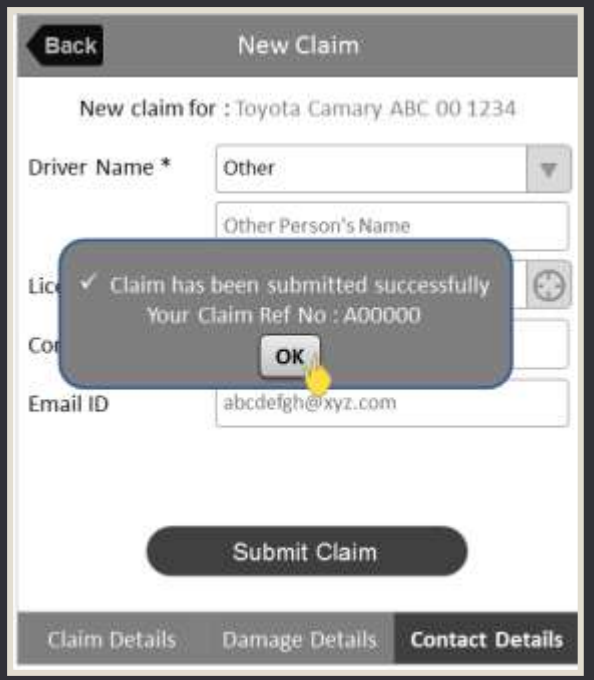
Insurance Mobile App – FNOL Module

First Notice of Loss: Vehicle Insurance application to track your policy details, premium installments and to raise claim.

App can be used at the accident site to capture damage details, 3rd party details and emergency assistance if required

- **Product Conceptualization**
- **PET Design**
- **Task flows**
- **Interactive Wireframes & Prototypes**
- **Usability Testing**





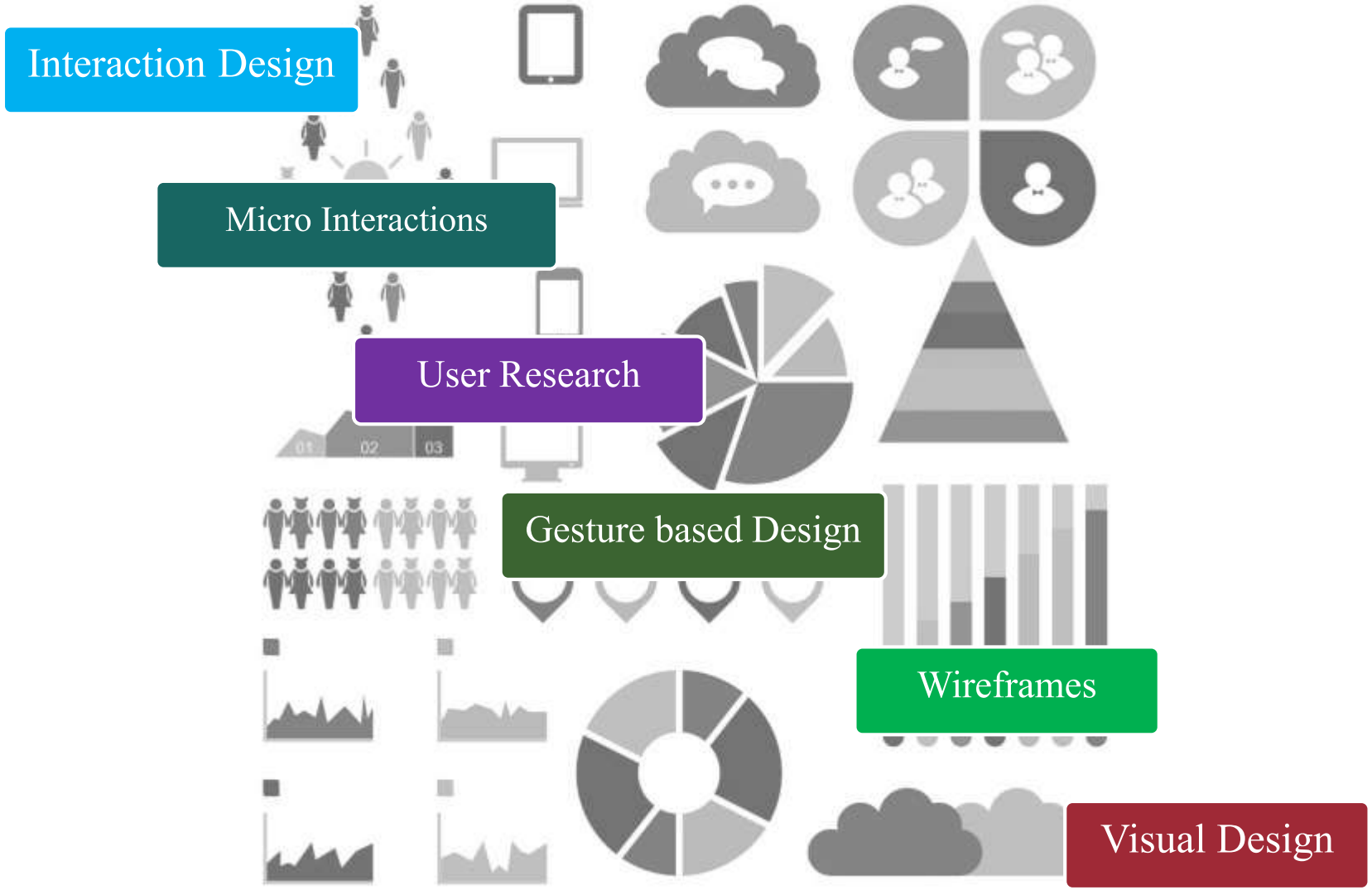
Mobile Maps App – British multinational insurance company

App for internal employee collaboration and productivity being in downtown, surrounded by multiple office building.

Employees can find particular company buildings, get directions, and in-building resources like meeting rooms, cafeteria, printer etc.

- **Product Conceptualization**
- **Stakeholder Interviews**
- **Task flows**
- **Interactive Wireframes & Prototypes**
- **Usability Testing**

UI Designs


Interaction Design
Micro Interactions
User Research
Gesture based Design
Wireframes
Visual Design

iPad App – a Swiss leading wholesale provider of reinsurance

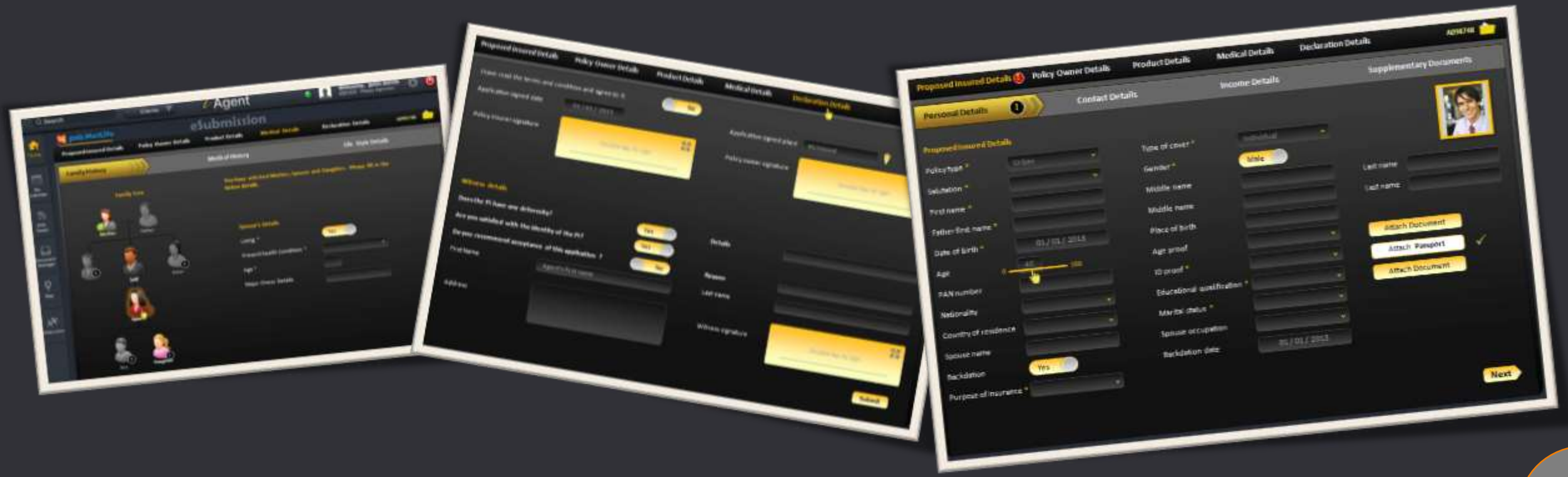
Claims, Accounting and Liability Management (CALM) tool monitors and shares financial information with internal and external stakeholders such as Client Markets, Underwriters and Brokers.

iPad App – Multinational financial service providers

Design considerations : 80/20 rule of design, Micro interactions, Environmental Factors, User Emotions and Gamification

iPad App – Indian Insurance Company with over 800 corporate clients

Financial app to calculate premium, generate illustration, Lead creation, Lead tracking and Final submission with client's digital signature capture



Insurance application for UK based leading insurance giant

Agent, Employee and end user application with complete visual re-branding and user experience.

Micro-interactions, Gamification, Imagery, Visual design, Style guides, usability checklists.

Claim app was referred as exemplary app in insurance domain for its PET design by international UX agencies (2014)

Thank You

Mira Bhatt (CUA™, CXA™)

Email: mirabhatt@yahoo.com

Mobile: +1 425 435 1635