ROBERT (BOB) MCKELVEY

Product / UX Design – Selected Portfolio Review
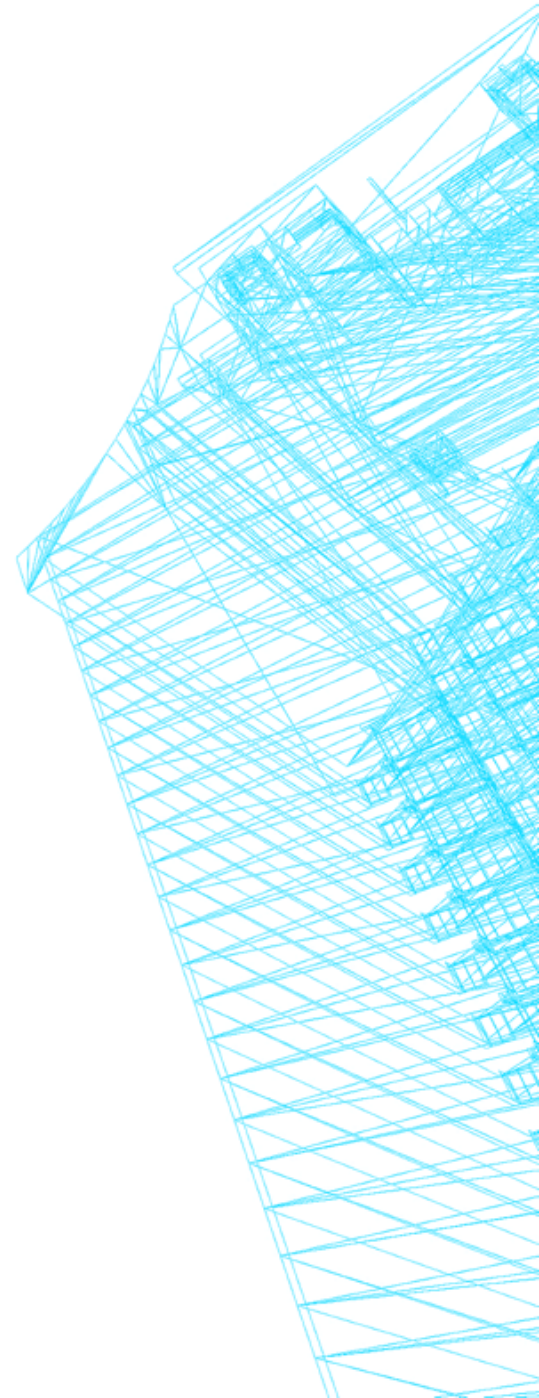
WHAT WILL COVER TODAY (1 HR)

- P1 – Web Portal Redesign - Argus Insurance (15 min)

- P2 – SmilesBack – Milk Allergy App – Nestle' Health Science (15 min)

- P3 – Experience Transformation – CareCentrix (20 min)

- Discussion – Next Steps (10 min)

P1 - ARGUS

International Insurance Company - Customer Portal Re-Design

P1 - PROBLEM STATEMENT

Internal Associate:

Our customer portals cause confusion for our customers, who end up calling customer service instead of self servicing their many basic insurance needs. Our portals are not designed for our mobile customers or other form factors.

External Customer:

I can never seem to find the answers to my questions on-line, and simple features like paying my bill on-line is not available.
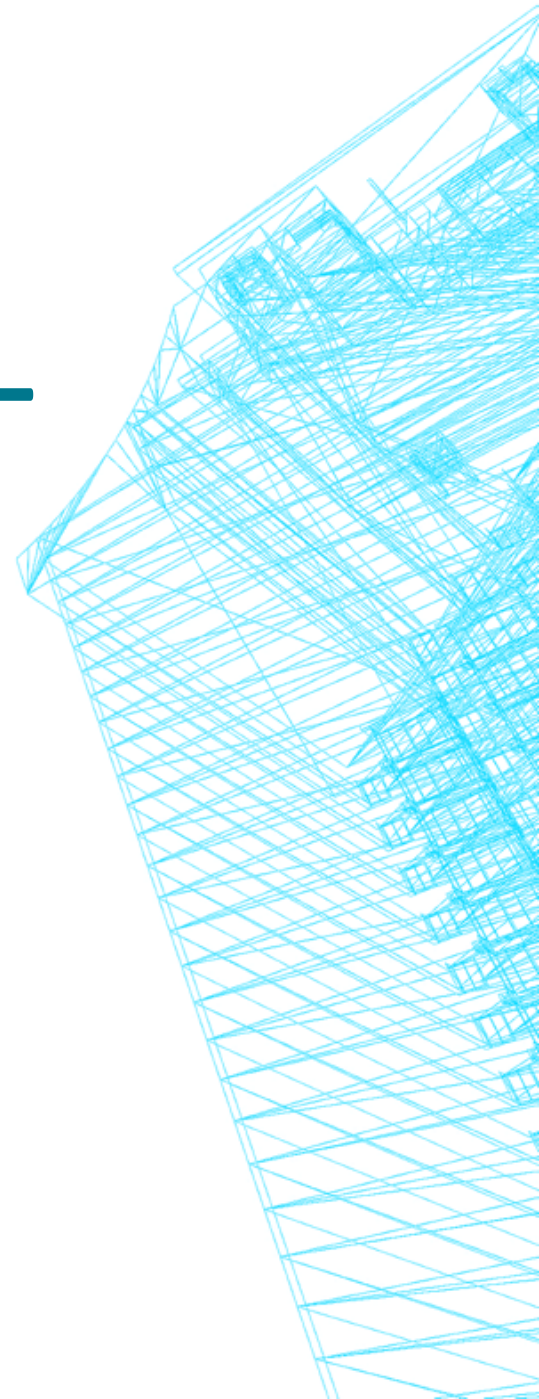
ARGUS
Our Interest is You.

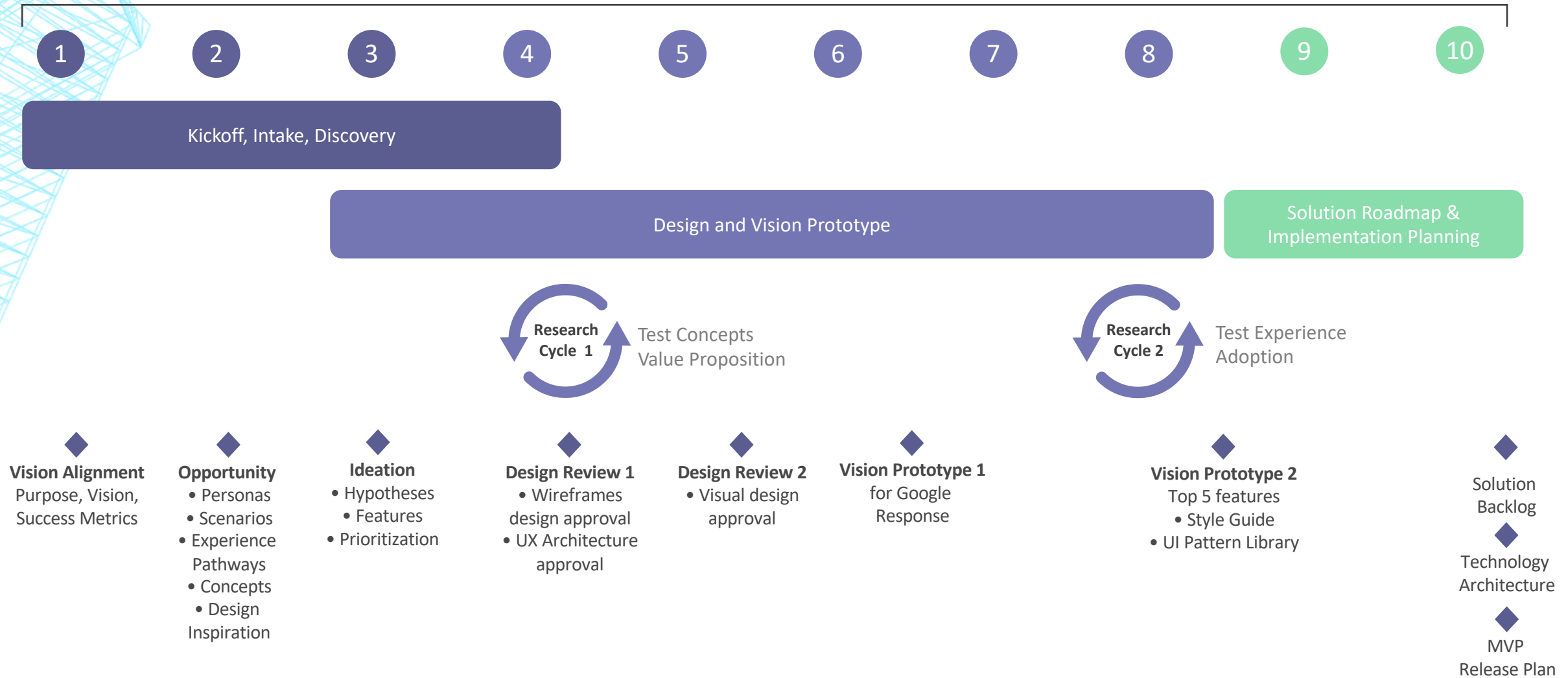Health ▾   Life   Disability   Workers' Compensation   Property & Casualty ▾   Pensions & Investments ▾   Wealth Management

Our New Member Health Portal

Your one-stop-shop to access and manage
your Argus Health information online

Learn More

‹   ›

UX / DEV PROCESS TIMELINE

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Kickoff, Intake, Discovery

Design and Vision Prototype

Solution Roadmap & Implementation Planning

Research Cycle 1 — Test Concepts / Value Proposition

Research Cycle 2 — Test Experience / Adoption

Vision Alignment
Purpose, Vision, Success Metrics

Opportunity
• Personas
• Scenarios
• Experience Pathways
• Concepts
• Design Inspiration

Ideation
• Hypotheses
• Features
• Prioritization

Design Review 1
• Wireframes design approval
• UX Architecture approval

Design Review 2
• Visual design approval

Vision Prototype 1
for Google Response

Vision Prototype 2
Top 5 features
• Style Guide
• UI Pattern Library

Solution Backlog

Technology Architecture

MVP Release Plan

P1 ARGUS PORTAL SUMMARY

- Responsive redesign for all customer facing web portals (3 countries, multiple products). Designed for all form factors (mobile, tablet and desktop).

- Gathered feedback from employees and customers to understand customer pain points. Personas developed

- Designed CMS Templates for easy development and maintenance. Created detailed sites maps, Wireframes, flows and Prototypes.

- Created unified navigation scheme to seamless integrate 3rd party portals and administrative tasks.

P1 - APPLIED SKILLS & TOOLS

Skills

- Project & Client Management
- Lead Facilitator, International UX Workshops – 3 Sites
- Lead UX Designer
  - Research - Discovery Intake
  - UI Design / Flows and CTA's
  - Interaction Design / Wireframes
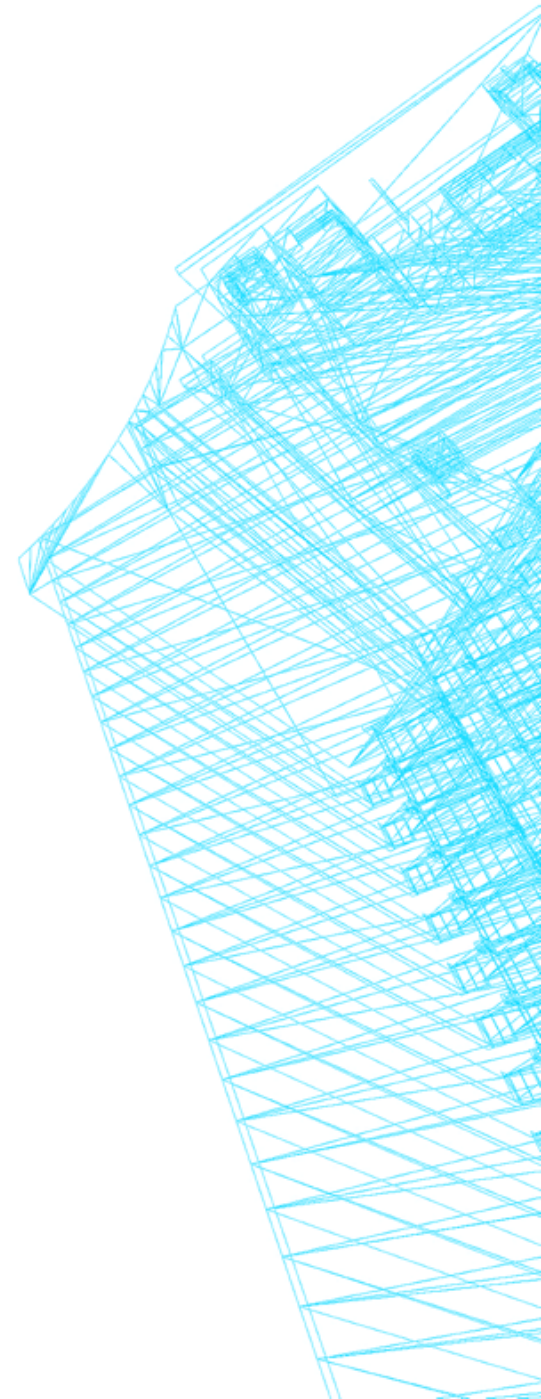 - Visual Design / Layout Images
  - Development Liaison

Tools

- Jira & Rally (CA Tech) – Agile Methodology Software
- MS Office
- Axure RP / Sketch / InVision
- Adobe CC Suite

P2 – SMILESBACK / APP

Cows Milk Allergy App – Nestle' Health Science
Android / iOS

P2 - PROBLEM STATEMENT

Business:

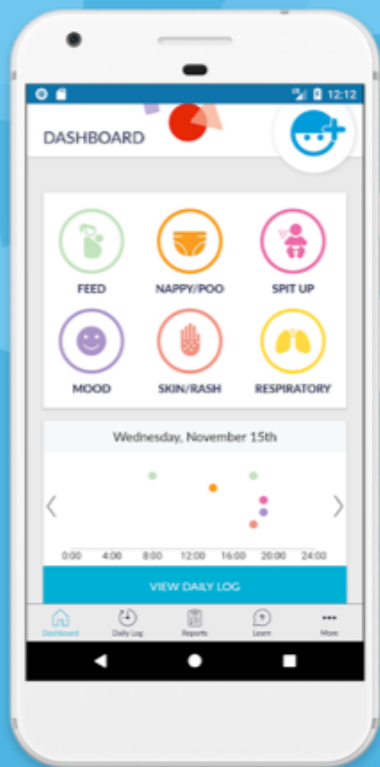We sell the infant formula that can help cure babies with Cows Milk Allergies, we want an easy way to connect parents with this potential treatment.
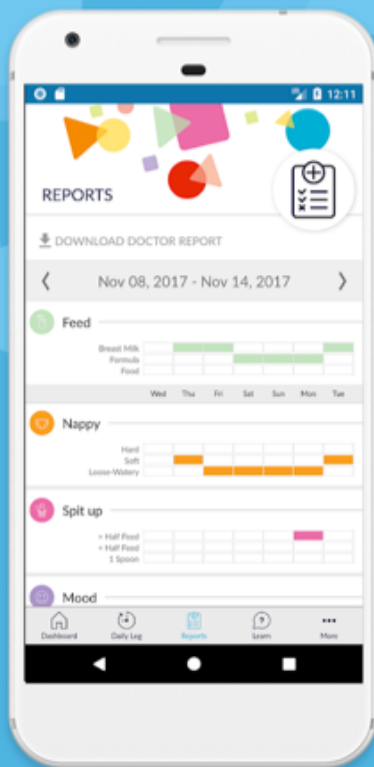
External Customer:

I have no way to convince my doctor that my baby has CMA – I need an easy way to track symptoms and get diagnosed so I can get my bay happy again.
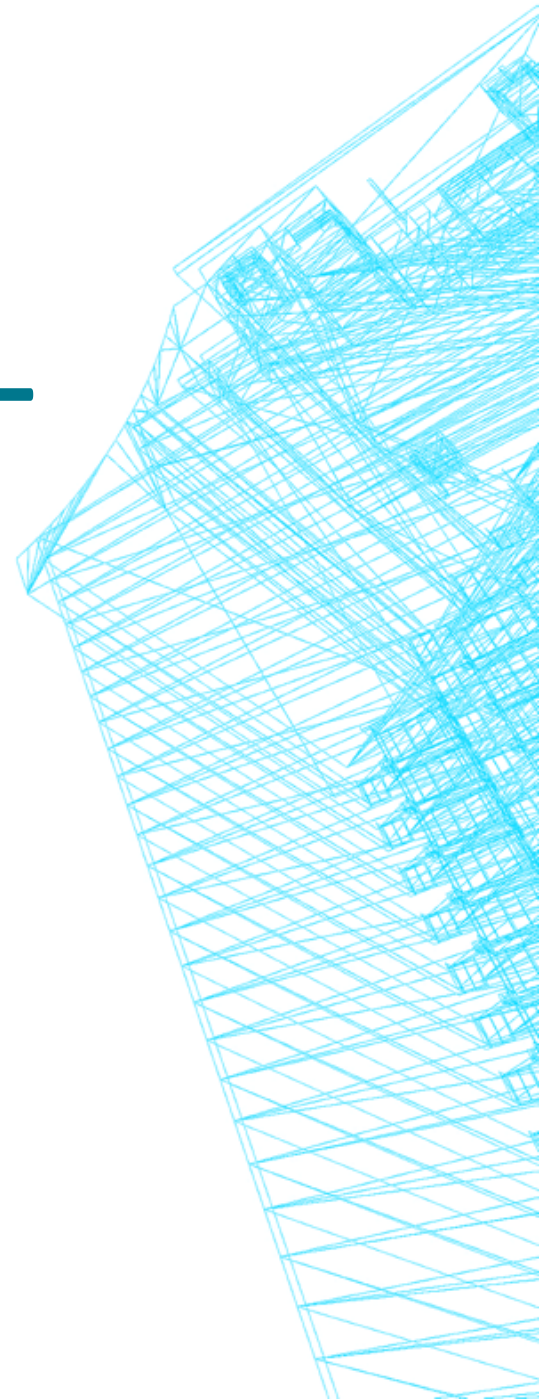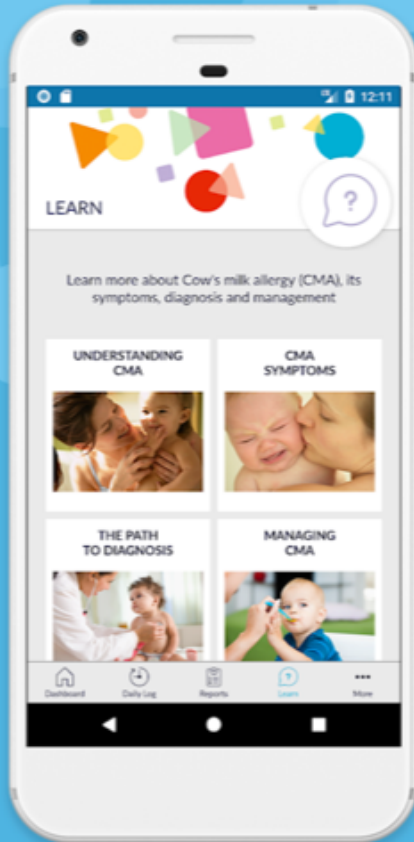
TRACK SYMPTOMS & EVENTS

VIEW DAILY & WEEKLY SUMMARIES

SHARE REPORTS WITH DOCTORS OR HEALTH PROFESSIONALS

P2 SMILESBACK APP SUMMARY

- Mobile App Design (Android, iOS). Personas, wireframes, prototypes created.

- Gather feedback from Subject Matter Experts (SME's) and Parents of new born with CMA diagnoses about preferred features and proposed App designs.

- Navigate the European (digital) heath regulations.

- HIPA Secured, Cloud Service data storage strategy.

- 5-Star rating on iTunes and Android play.

P2 - APPLIED SKILLS & TOOLS

Skills

- Research and Competitive Analysis
- Lead UX Designer
  - Mobile App Design (Android /iOS)
  - User Research
  - UI Design
  - Interaction Design
  - Visual Design
  - Design reviews
  - Development Liaison

Tools

- Jira & Rally (CA Tech) – Agile Methodology Software
- MS Office
- Sketch / InVision
- Material Design & iOS Standards
- Adobe CC Suite

P3 - CARECENTRIX

Experience Transformation – Portal Redesign
(Internal & External) Digital Administration Processes
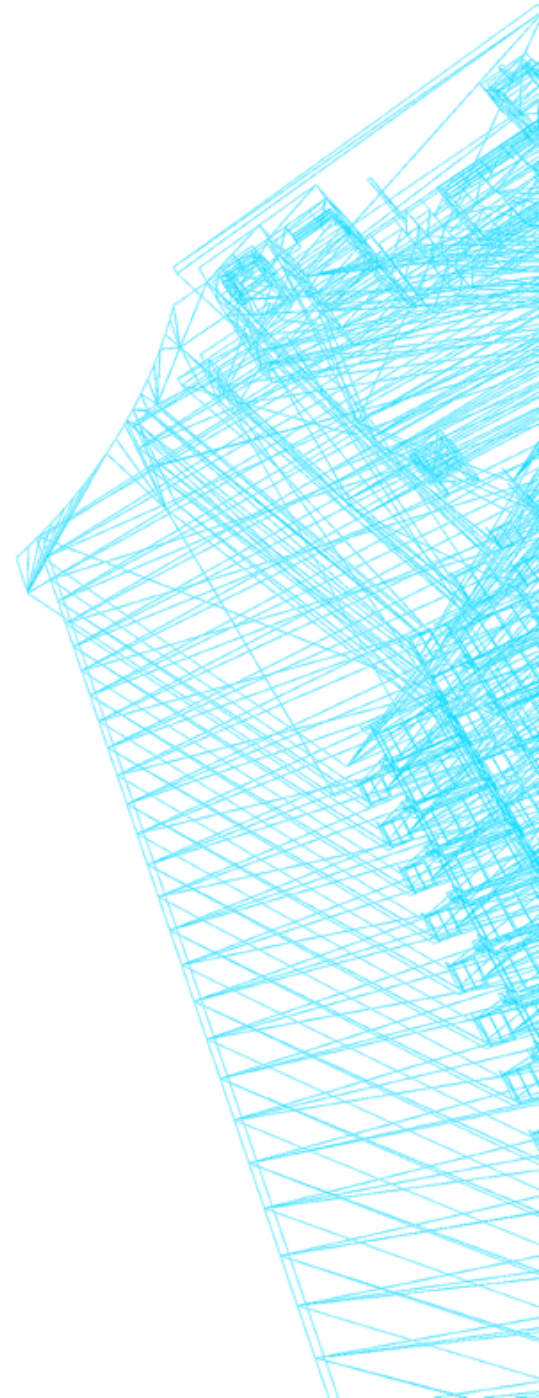
P3 - PROBLEM STATEMENT

Product Owner:

We have no design consistency, all new design are cobbled together on the fly, and not tested with users. The portal call center is the biggest cost for the company with over 200 customer service representatives.

Internal Associate:

The on line systems we use are slow and cumbersome, I need multiscreen and applications opened at once to do my job. I am not equipped to handling the amount of customer requests I receive everyday.

External Customer:

I am force to use a system that is impossible to use, I have to call them ever time I use their system. I never know the status of my billing and payments owed to my company.
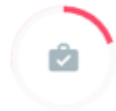
Lori

Care Management   Authorizations   Claims   Resources   Reports
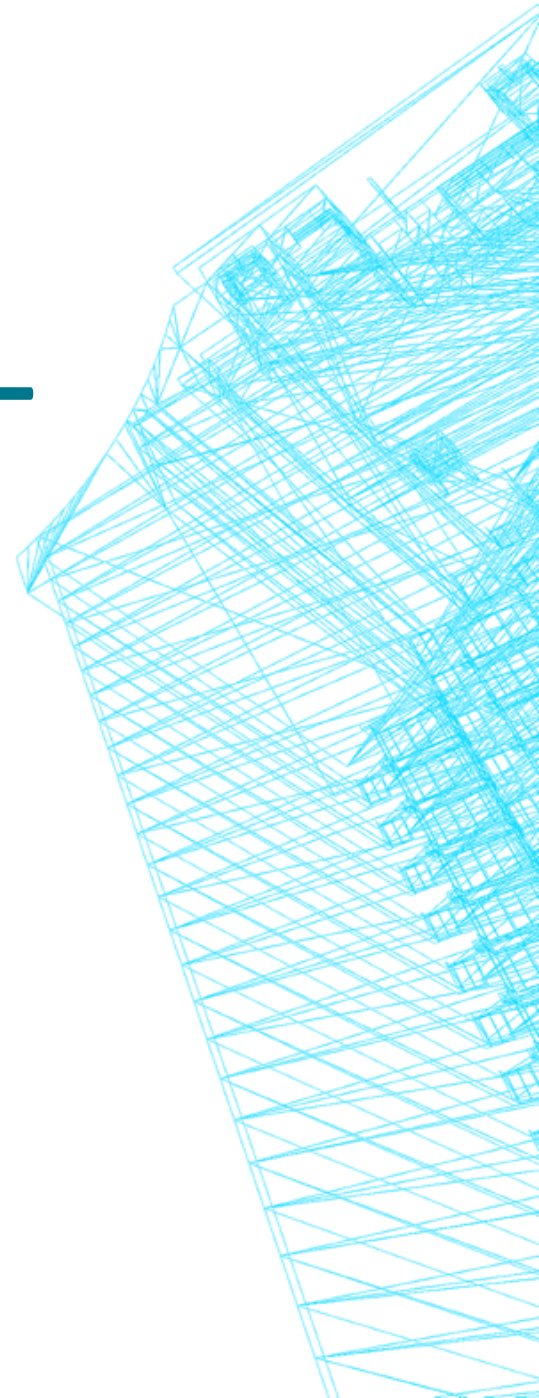
86
Authorizations

248
Claims

352
Care Management

Intake Volume
45 this week

Tasks

Authorizations   Claims   Care Management   History

Manage ▾

Search:

☐	Name ⬍	Date ⬍	Intake ID ⬍	Priority ⬍	Action ⬍
☐	Elizabeth Hall	Oct 11	123456789	Standard	Manage ▾
☐	Kyle Mayor	Oct 12	000000	Urgent	Manage ▾
☐	Tyler John Smith	Oct 11	123456789	Standard	Manage ▾
☐	Ralph Thornton	Oct 12	000000	Urgent	Manage ▾
☐	Lucille Gonzalez	Oct 11	123456789	Standard	Manage ▾
☐	Justin Believer	Oct 12	000000	Urgent	Manage ▾
☐	Luis Maldonado	Oct 11	123456789	Standard	Manage ▾

Care Management   Authorizations   Claims   Resources   Reports

Request an Initial Authorization

(1) Step 1 ——— (2) Step 2 ——— (3) Step 3 ——— (4) Step 4

First Name : *

Last Name : *

Email Address : *

Phone Number :

Select City : *

Select City

Date of Birth :

mm/dd/yyyy

Previous   Next

P Brand   •° Ui Elements   📄 Forms   ⊞ Tables   📖 Pages   ⬛ Misc

Logos
Home > Logos

Large Logo - Light
250x50px

⬇ Download

Medium Logo - Light
150x30px

⬇ Download

Small Logo - Light
100x20px

⬇ Download

Large Logo - Dark
250x50px

⬇ Download

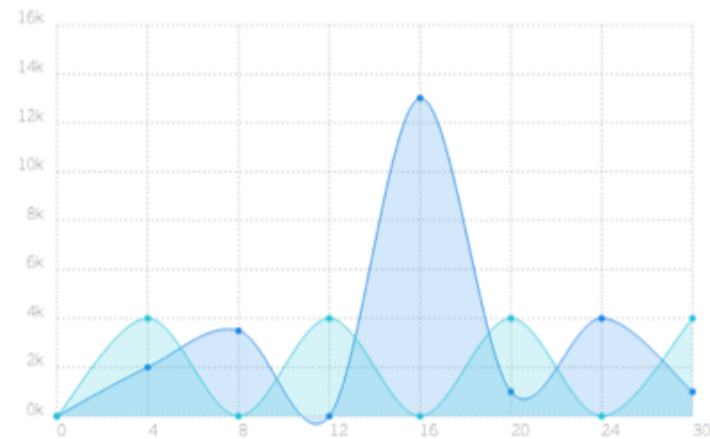### Medium Logo - Dark
150x30px

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Small Logo - Dark
100x20px

⬇ Download

P3 CARECENTRIX SUMMARY

- Define and document research of internal and external portal users.

- Design and run UX 101 internal company workshops (Ambassador program) to create support with in different division of the company (UX Ambassadors).

- Review proposed designs with internal development team and share front end technologies (Bootstrap) and Design System with code snippets.

- Redesign complex administrative tasks flows in context with system limitations, performance, timing, and development resources.

- Create on going steady stream release schedule to support customer rollout strategy.

P3 - APPLIED SKILLS & TOOLS

Skills

- Project & Client Management

- Lead Facilitator, UX 101 Workshops

- Lead UX Designer
    - Researcher - Discovery Intake
    - UI Design, Wireframes
    - Interaction Design, Sketch Prototypes
    - Visual Design, Material Design
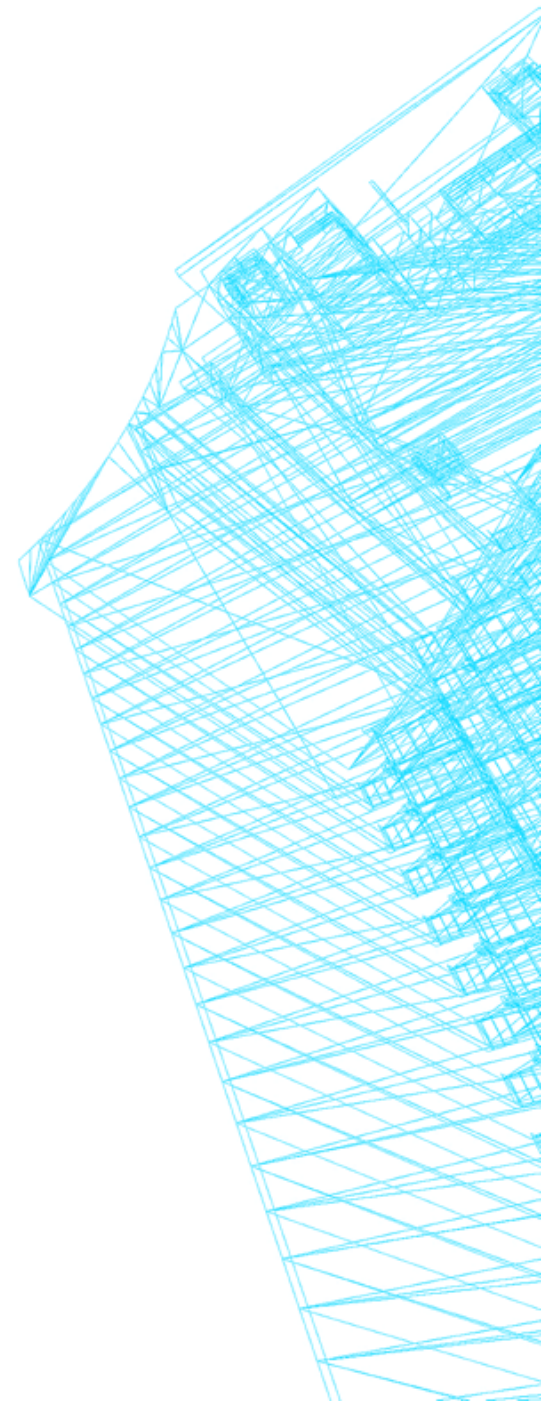   - Development Liaison

Tools

- Jira & Rally (CA Tech) – Agile Methodology Software

- GoTo Meeting

- MS Office

- Axure RP / Sketch / InVision

- Adobe CC Suite

- Bootstrap, Material Design

DISCUSSION

10 min

THANK YOU!

www.mckelveydesign.com