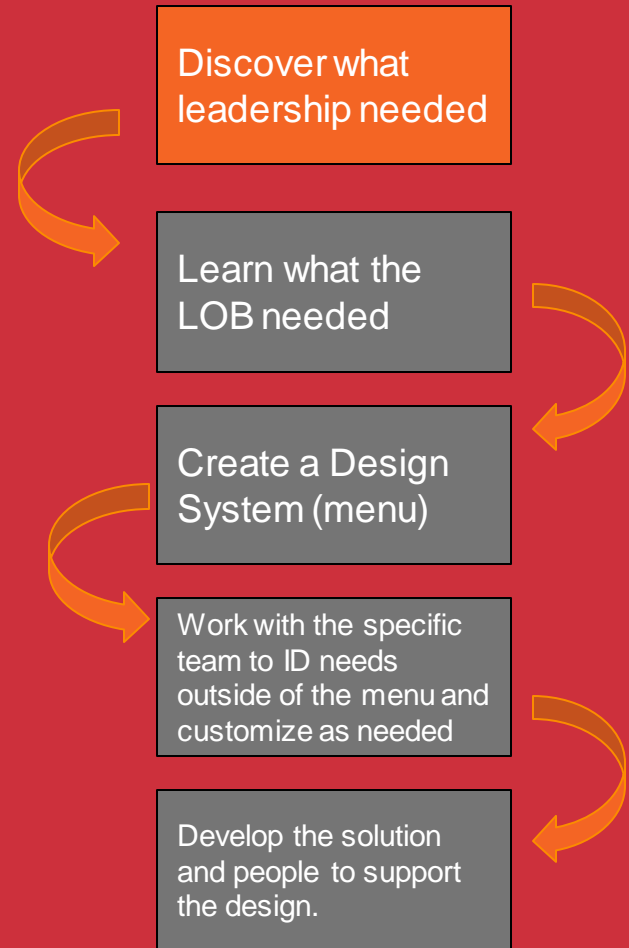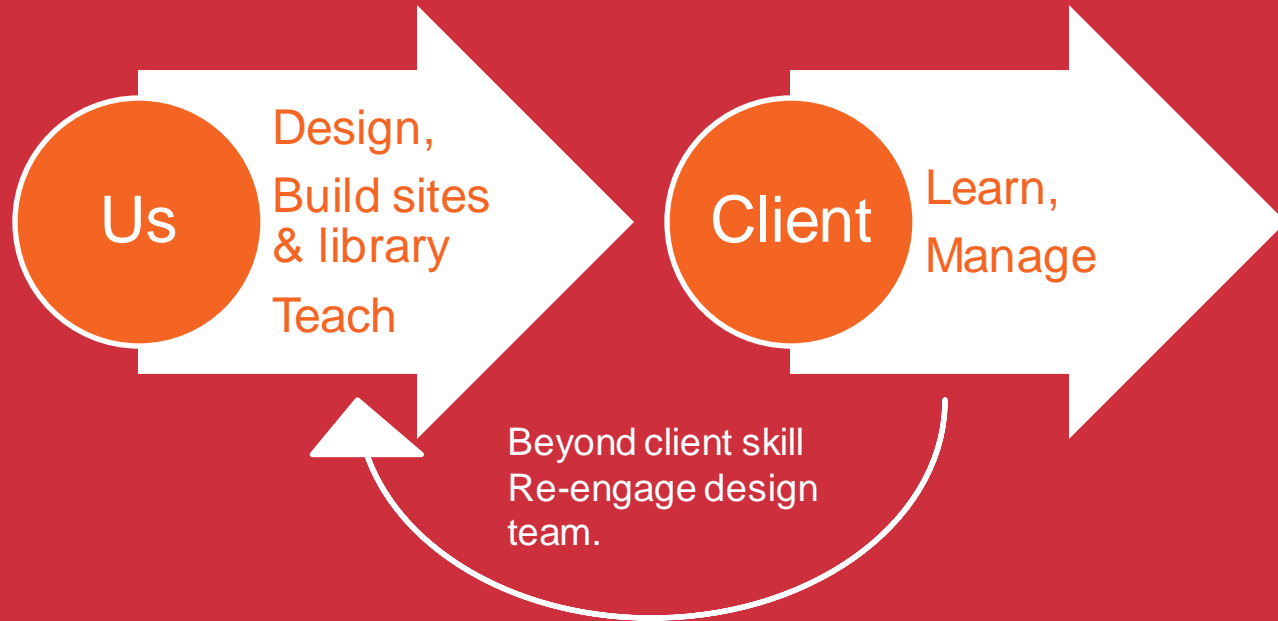# Case Study: LOB Portals

Problem:

At a leading global large banking corporation with approximately 350,000 employees, the high turnover rate poses a significant challenge. Valuable knowledge is lost with departing employees due to the absence of a standardized practice for preserving institutional wisdom. Additionally, teams struggle to access essential information and desire a centralized platform for sharing resources and communicating effectively. Leadership acknowledges the need for a solution that fosters knowledge retention, facilitates inter-team collaboration, and streamlines communication processes, thereby enhancing overall efficiency and success.

Discover what leadership needed

Learn what the LOB needed

Create a Design System (menu)

Work with the specific team to ID needs outside of the menu and customize as needed

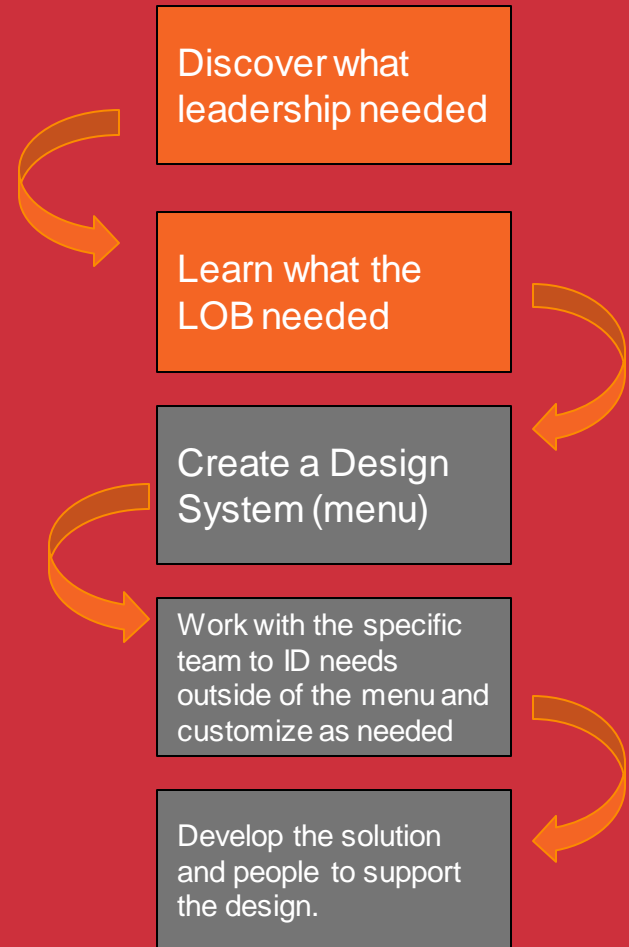Develop the solution and people to support the design.

Journey Mapping

Leadership sought to develop a minimum viable product, assigning an employee to oversee day-to-day updates on each portal. This initiative aimed to establish a process enabling site managers to re-engage with the design and development pipeline. Additionally, it served as an agile introduction into the communications department.

Us

Design,
Build sites
& library

Teach

Client

Learn,
Manage

Beyond client skill
Re-engage design
team.

Research & Discovery

I initiated the project by conducting research and discovery sessions with leadership, followed by stakeholder interviews to gain insights. One key focus was accessing our user base. I collaborated with 4-5 stakeholders from various teams, sending them surveys to gather input on ideal features and functions. By analyzing data from both leadership and additional business stakeholders, I determined the features and functions to incorporate into a design system (menu). This decision was informed by secondary research, general UX principles, and a curated library of online resources dedicated to UX, serving as a valuable third reference.

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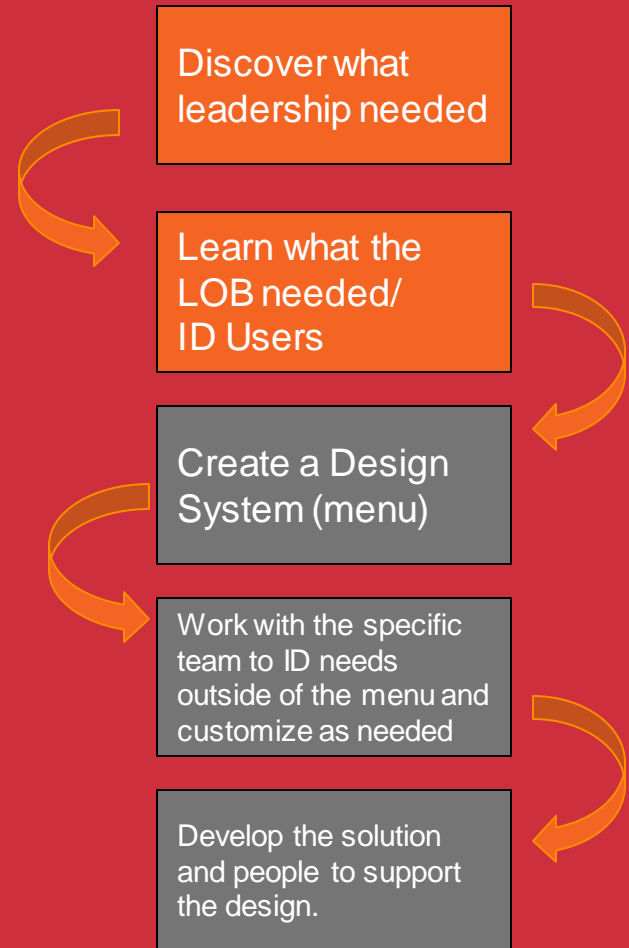Develop the solution and people to support the design.

Definition of User Groups/Personas

Collaborating closely with leadership and business stakeholders, I gained valuable insights into our user demographics, gathered through employee surveys and data analysis. These insights revealed a diverse user base, including internal business subject matter experts, portal managers, new hires, international employees with varying native languages, contact center representatives, and bank employees.
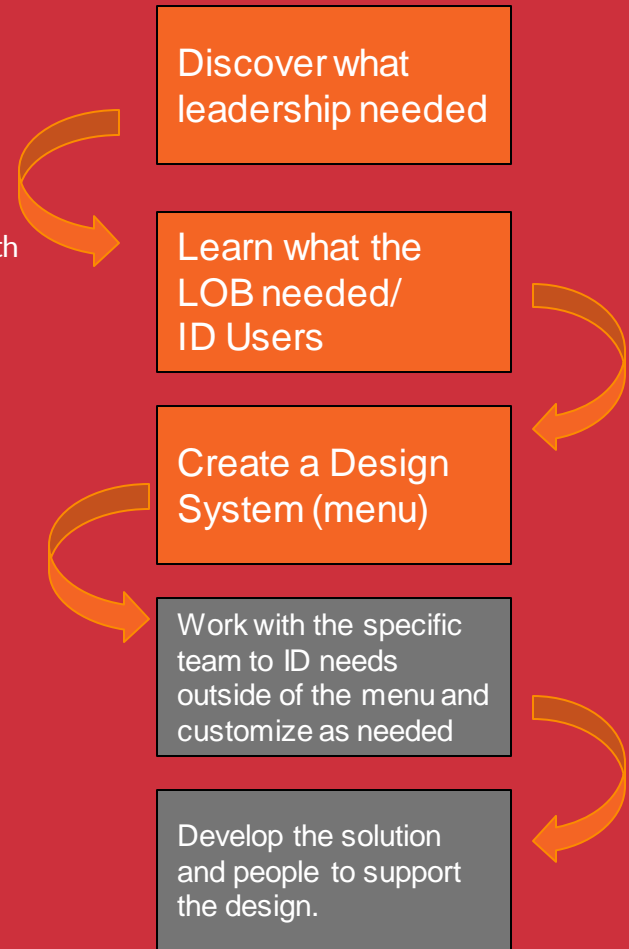
Considering the diverse user needs, it was imperative that the language used on the portals was clear, easily understandable, and digestible, with the option for users to delve deeper into more detailed information. Furthermore, imagery had to be both clear and aligned with our brand standards, visually cohesive across all platforms.

In terms of user access, secure login credentials were necessary to track site usage and ensure data security. This allowed us to tailor the user experience more effectively to meet the needs of our diverse user base.

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Design System (aka the menu)

I developed a comprehensive design system to streamline the workflow with my clients, encompassing imagery, interactive components, lists, forms, surveys, and additional elements. This design system not only facilitated client conceptualization but also served as a functional prototype.
During client collaboration sessions, the design system functioned akin to a menu, allowing for efficient selection and customization of components within a sprint framework. Customizations were accommodated and integrated into the component library, enhancing the system as a valuable learning resource for future projects.

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Work funnel, KPI, Success metrics

Before engaging with key stakeholders, I developed a variety of reference materials to streamline processes. Among these were design print templates, allowing stakeholders to create wireframes both offline and online.

Additionally, I implemented an intake process to gather initial information from key stakeholders, enhancing the research aspect of the project. This process included details such as progress, notes, status, URLs, and other pertinent information.

The worklist, also known as the KPI Dashboard, offered transparency to other teams, enabling them to track the progress of sites under development and observe how different areas utilized their space and evolved. This dashboard provided leadership with valuable insights into the implementation of the vast projects.

Client intake

KPI
Data

Client output

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The Sprint

In collaboration with leadership, I structured the two-week sprint as outlined below. During this timeframe, key stakeholders were actively involved in learning to manage the diverse site functionalities. Building and nurturing relationships was also integral to the process, as reengagement formed a vital component of our strategy.

| Intro/meet Team turns in worksheet with ideas	Co-Create - Wireframes	Co-Create	Co-Create User Flows/Lo-FI Designs to share with leadership	Co-Create	Design higher fidelity wireframes created to submit to leadership
Site dev starts	Co-Create Dev/train/test	Co-Create Dev/train/test	Co-Create Dev/train/test	Co-Create Dev/train/test	Co-Create Dev/train Sign off

Prototypes

Utilizing the design library, we had prototypes readily accessible, developed using Sketch, Photoshop, and Illustrator. Our progression followed a path from low to higher fidelity designs.
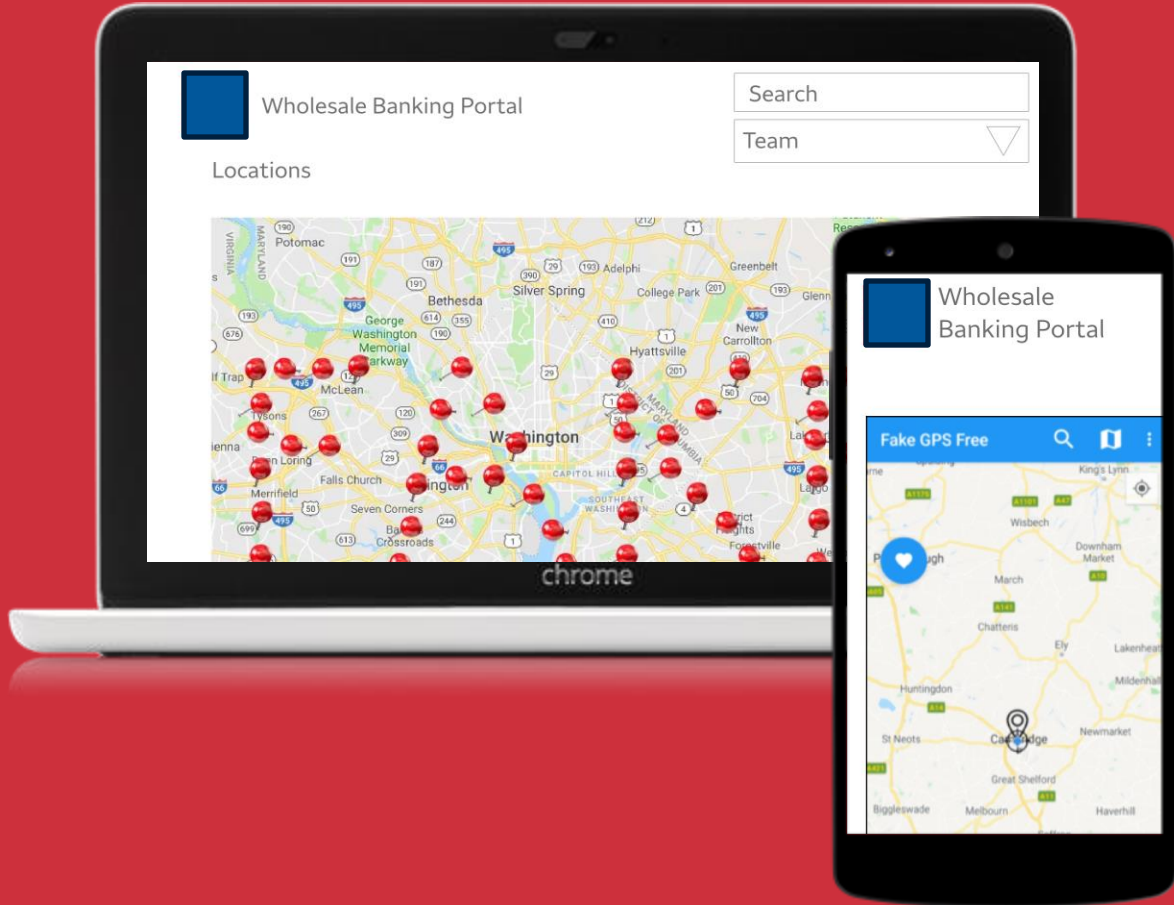
User flows

In collaboration with stakeholders, I crafted user flows encompassing diverse site content dives, forms, process flows, and more.
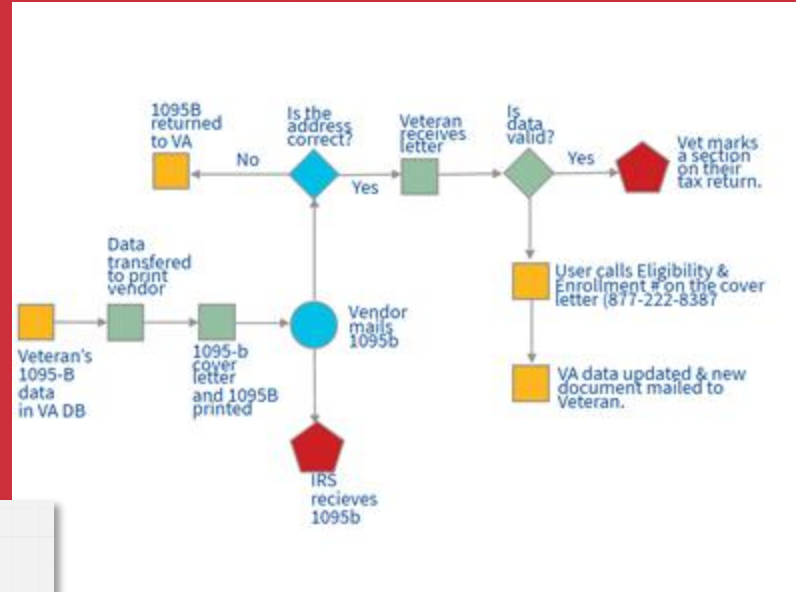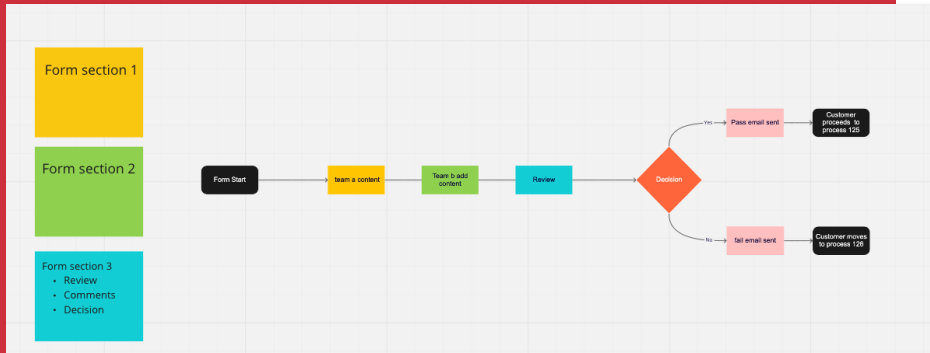
These workflows and diagrams are created by me to give the effect of what was done during this project.

Example of ideation and design growth

By meeting with stakeholders, we facilitated rapid and iterative growth in the design process, culminating in a comprehensive package to present to leadership.

We generated artifacts to showcase the co-creation design sprint.

Additionally, users had the opportunity to test the built site before deployment in a staging area.

This prototype was developed solely for illustrative purposes.

People Development

In the second week, I allocated time to develop the site in the mornings and conduct teaching sessions with key stakeholders. These sessions were recorded and archived as reference material in a knowledge management library. This approach enabled stakeholders to test the site and offer feedback for necessary adjustments.

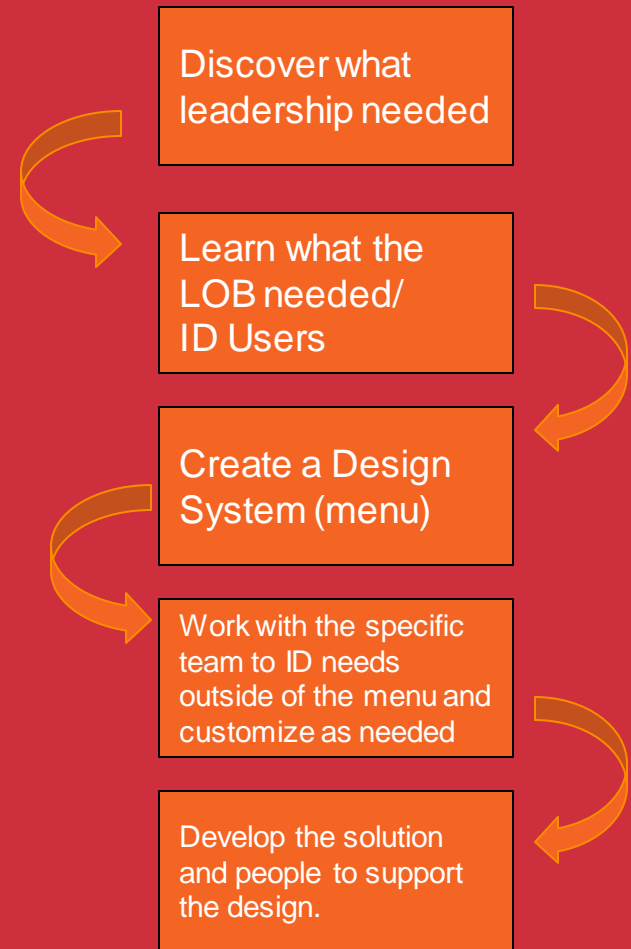| Site dev starts	Co-Create Dev/train/test	Co-Create Dev/train/test	Co-Create Dev/train/test	Co-Create Dev/train/test	Co-Create Dev/train/test	Co-Create Dev/train Sign off

Portfolio Development

As the portfolio expanded with new clients, the inventory within the design system also grew. New components were continually incorporated into the system to accommodate evolving needs.
While not all requested components were immediately feasible due to technological limitations, some ideas were placed in a "parking lot" for future consideration when technology became available. This documentation provided a platform for leadership and stakeholders to explore additional needs, emphasizing the importance of capturing all ideas in the co-creation process.
Examples of such ideas included:

- Machine learning
- Voice search
- AI search
- Chatbots
- Microsoft Teams

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The User insight

Following the sprint's completion, I conducted a final check-in with the site manager to ensure completion of implementation planning before the site went live.

Users were surveyed two days after the launch and again two weeks later to assess any necessary updates or design changes. In the final survey, users were also connected with the site manager to establish a pipeline for feedback into the process.

All users were surveyed, as access to the portal required user login credentials.

2 days

2 weeks
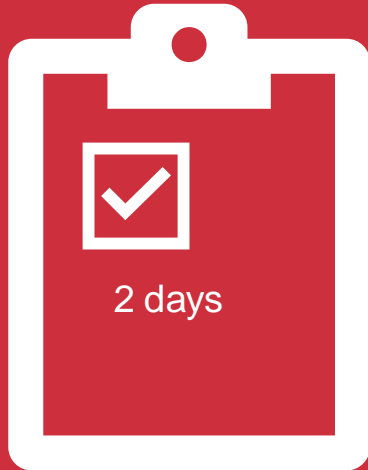
The end game

By July 2021, I had completed my last portal, totaling over 95, although exact numbers became difficult to track due to a reorganization and team restructuring.

I received commendation from leadership for the innovation I brought to the project. Data analysis revealed that users were accessing the sites daily and keeping them open for extended periods, indicating their value as resources. High site traffic, click-through rates, and other metrics further confirmed their effectiveness.

Here's what some of my clients had to say:

Working with Jesse is a delight! He is a creative and strategic consultant who excels at designing sustainable and practical solutions. Jesse Is a true partner and I can always count on him to help me figure out how to get the job done right.

Jesse is a unique talent with a deep set of skills that would benefit any organization. I had the pleasure of working with him for three years, and in that time, he consistently led with creativity, passion, and excellent ideas on how to best connect with a variety of internal and external audiences. He's equally adept at producing videos, infographics, and a number of other types of content. He's also a phenomenal teammate and partner who thrives in collaborative environments. Beyond all the skills he brings to the work setting, he's an even better person. Jess is kind, thoughtful, empathetic, and always looking out for ways to support his friends and colleagues. He'd be a tremendous asset to any team, and any organization.

I highly recommend Jesse for a multitude of reasons - from his technical abilities to his "on the spot" ideation. Most of all, I recommend Jesse for his talent in communicating alternatives. It requires great patience and persistence to ensure partners understand the ramifications of their development decisions. Jesse does a great job negotiating these solution driven conversations and helping teams successfully move forward with next steps.

Jesse supported myself and my team with website designs and portal support. I am an out of box thinker in a regulated industry and Jesse always did a wonderful job helping to bring my vision to life, staying within our guardrails. He consistently made it easy for me, which I appreciated! He always found time in his schedule to meet, over the phone - not email, to ensure I was kept up to speed on my teams work even when he was busy with others. I enjoyed, appreciated and was always happy having Jesse support me!