

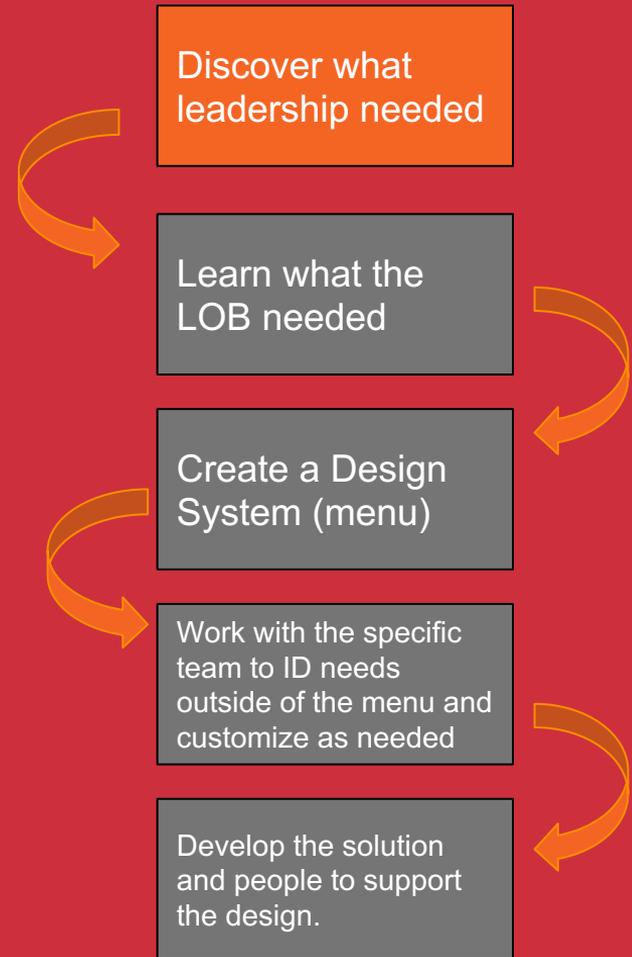


# Case Study: WF LOB Portals

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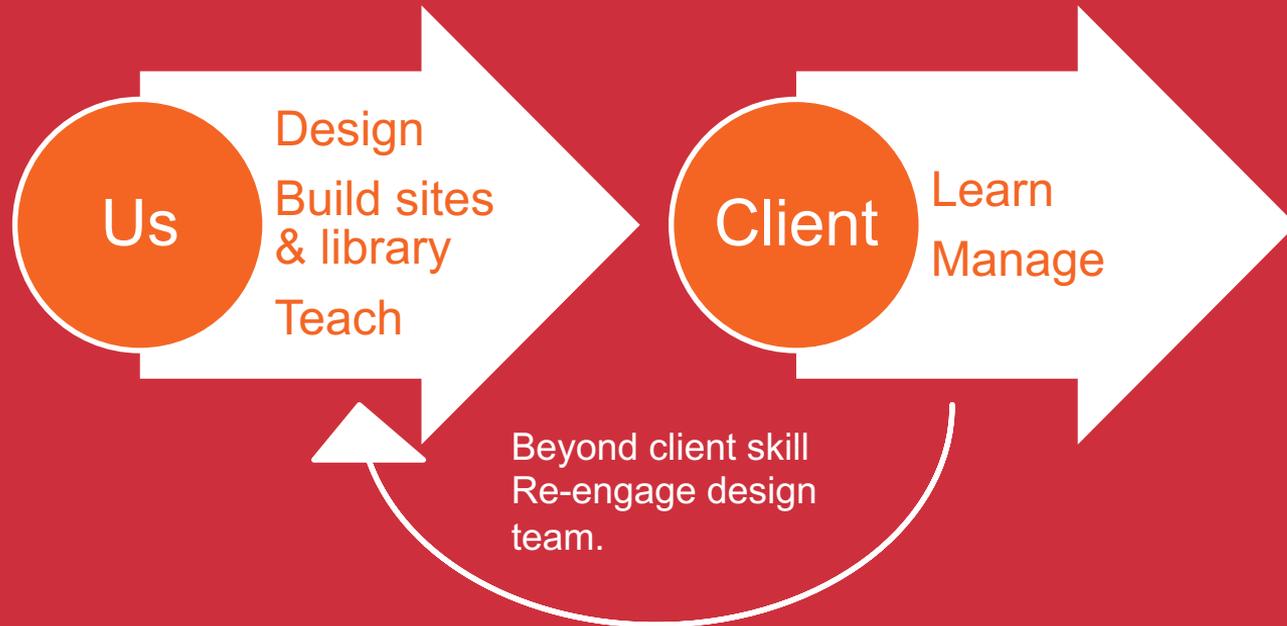
# Problem:

- Wells Fargo is a giant international company (~350,000 employees nationwide).
  - A lot of employee turnover often times this results in lost knowledge due to attrition. Oral history of large organizations=no standard practice
  - Teams want to share references, contacts, forms and other information.
  - Leadership found knowledge was difficult to find.
  - A lot of smaller teams want a space to communicate
  - Teams wanted to know they relate to the “big picture”.
  - Teams want to share reference material .
  - Teams want to interact with different teams.
  - Too much email retention for information



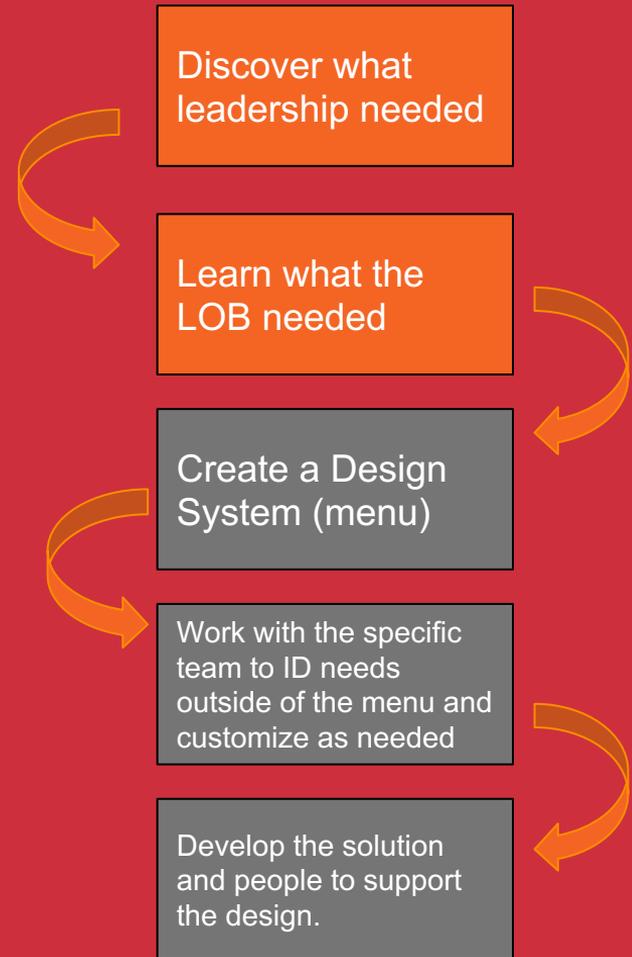
# Journey Mapping

Leadership was looking for a minimum viable product to be created, with an employee learning to manage the day to day updates on each portal, this would also create a process where the site manager could reengage with the design and development funnel. This was also an example of agile introduction into a communications department.



# Research & Discovery

1. I started with research & discovery through meetings with leadership.
  - This was conducted with stakeholder interviews.
  - One question was for access to our user set.
    - I was provided with a selection of 4-5 stakeholders in the various teams to work with.
2. Sent survey to 4-5 stakeholders
  1. Inquiring on features and functions that would be ideal for them.
3. Using the data from both leadership stakeholders and additional business stakeholders I came to the conclusion on what sort of features and functions to build into a design system (menu)
4. This combined with secondary research and general UX principles gave me a baseline. I manage a library of online resources tied to UX as a third reference reference.



# Definition of User Groups/Personas

Working with leadership & business stakeholders I was provided with insight on the users (gathered through employee survey and data).

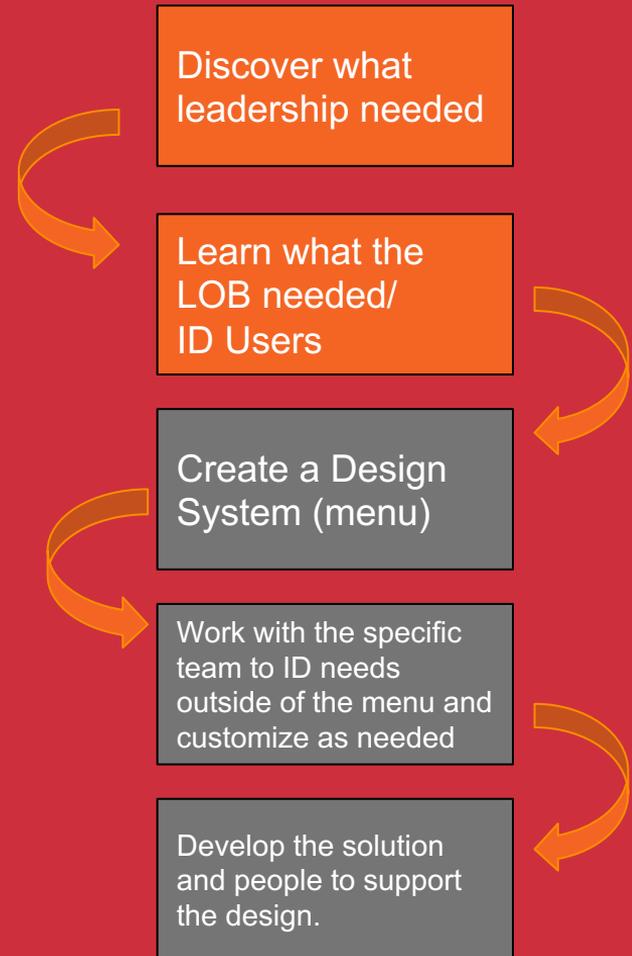
Which as follows:

- Internal Business Subject Matter Experts
- Portal Managers
- New hires
- International employees with different native languages
- Contact Center Reps
- Bank Employees

Language had to be easy to understand and snackable with dive ins for more detail – since the user may be trying on a number of sites to find information.

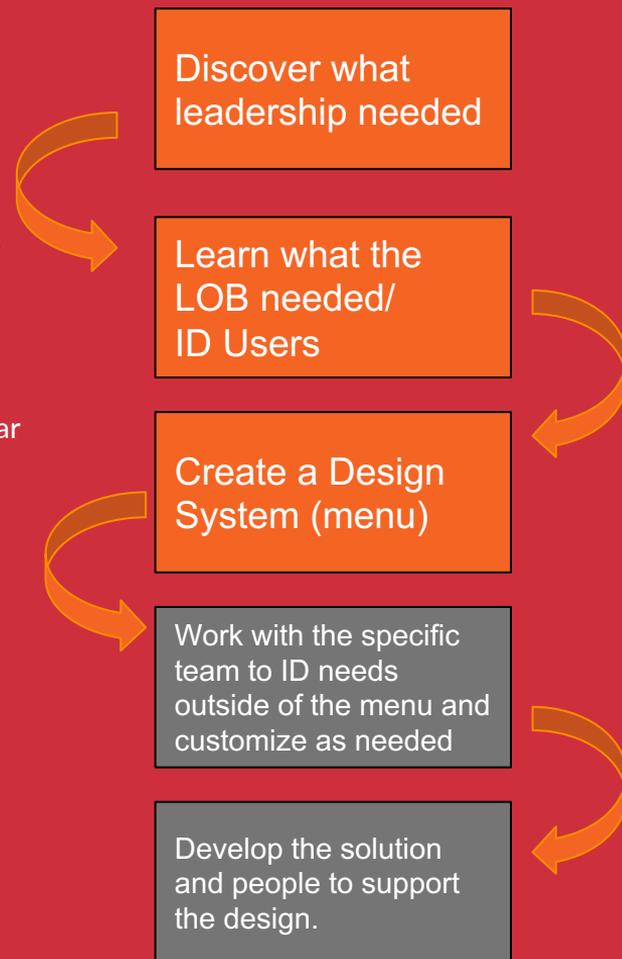
Imagery had to be clear and within brand standards. It also needed to visually tie together.

As far as a user set, we could access who has used the site as they would need a secure log in to the portals.



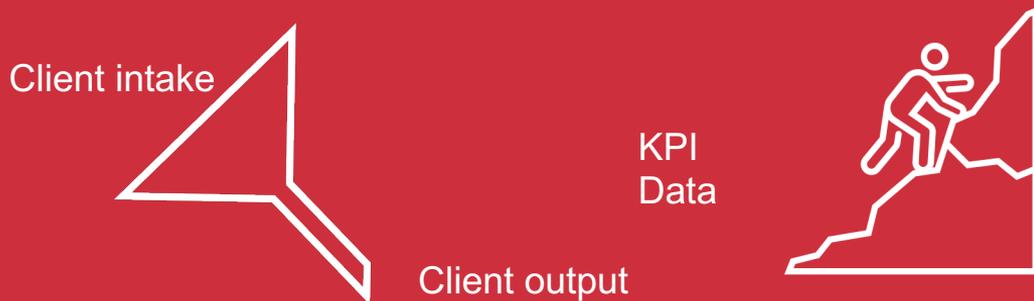
# Design System (aka the menu)

- I created a design system to help speed up the process with my clients.
- The system included imagery, interaction components, lists, forms, surveys and more.
- This design system not only helped to ease the process of client conceptualization but also provided as a functional prototype.
- While working with the client in a sprint we could use the system similar to a menu of sorts.
- Like all menus, there are some customizations that were allowed and added to the component library, which created a learning resource.



# Work funnel, KPI, Success metrics

1. I designed a lot of reference material prior to engagement with the various key stakeholders as a way to streamline the processes.
2. One thing I designed and utilized was a number of design print templates where a stakeholder could use it to create within a wire frame offline vs online
3. I also created an intake process that gathered initial information from Key Stakeholders prior to engagement in order to allow for essentially providing as an additional research aspect. This list also displayed additional items related to the project such as progress, notes, status, url, details.
4. The worklist also displayed transparency to other teams where they could view the sites in progress to see how other areas were using their space and evolution.
5. This worklist also was known as the KPI Dashboard for the project giving leadership insight into the vast projects implementation



Discover what leadership needed

Learn what the LOB needed/ ID Users

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.

# The Sprint

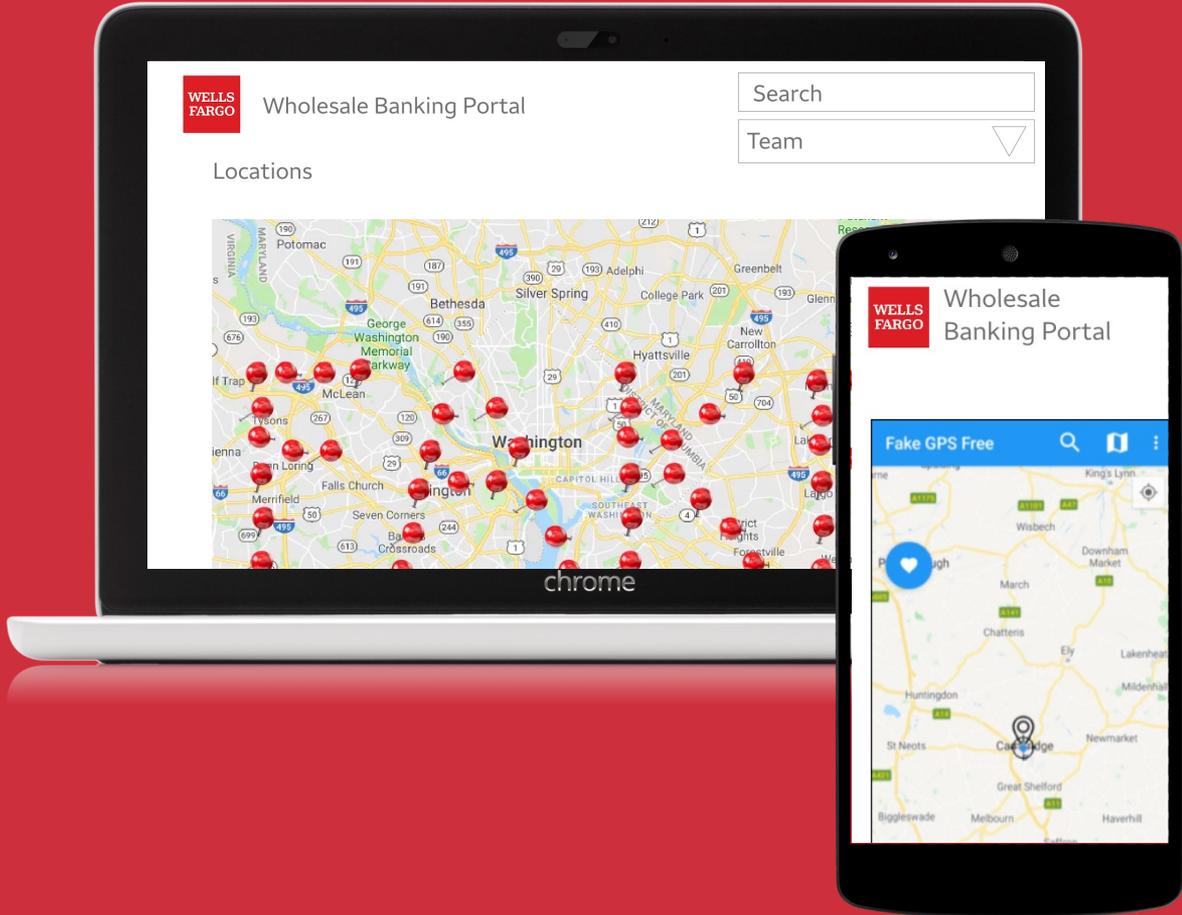
With leadership involvement I designed the 2 week sprint to exist as displayed below. Within this 2 weeks key stakeholders would also learn how to manage the various site functionality. Development of the relationship was also important as reengagement was part of the process.

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

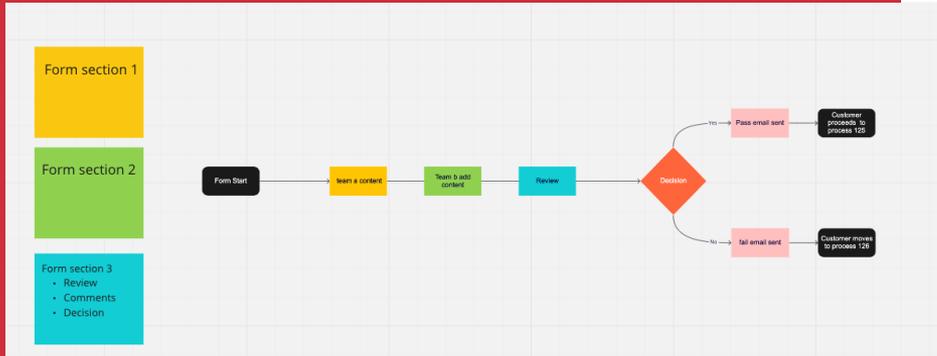
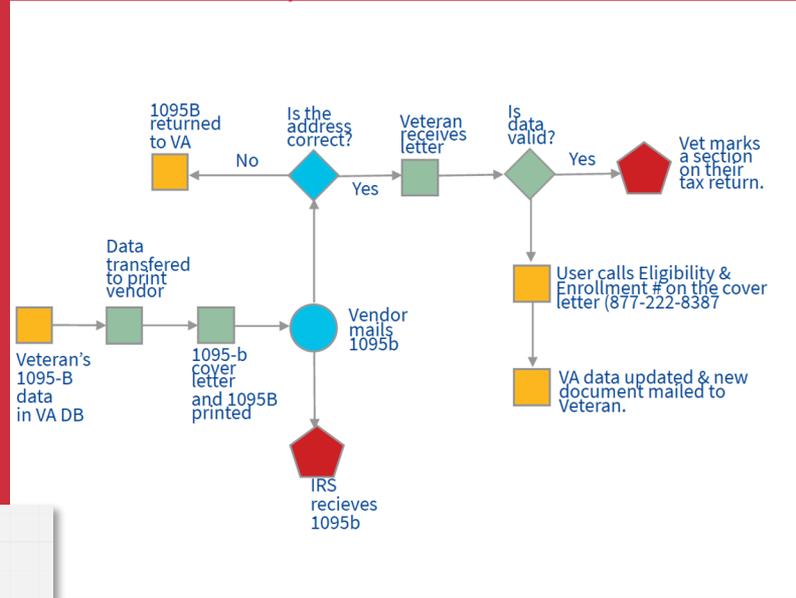
Using the design library, prototypes were available, created in sketch, photoshop and illustrator.

We moved from low to higher fidelity.



# User flows

Together with the stakeholders I designed user flows for various site content dives, forms, process flows and more.



# Example of ideation and design growth

Meeting with stakeholders you could get fast and iterative growth on the design and a package to share with leadership.

Artifacts were created to show the cocreation design sprint.

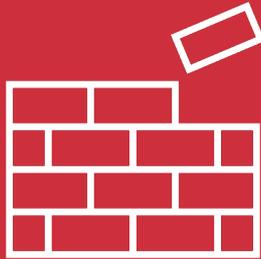
For the built site, users could test prior to deployment in a staging area.

This is a prototype, I had created for illustrative purposes, not associated with WF.



# People Development

During the second week, I would have days where I would develop the site in the morning and then have a teaching session with the key stakeholders. Which were recorded and used as reference material in a library for knowledge management. This also allowed the stakeholder to test the site and provide feedback for any changes that needed to be done.



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

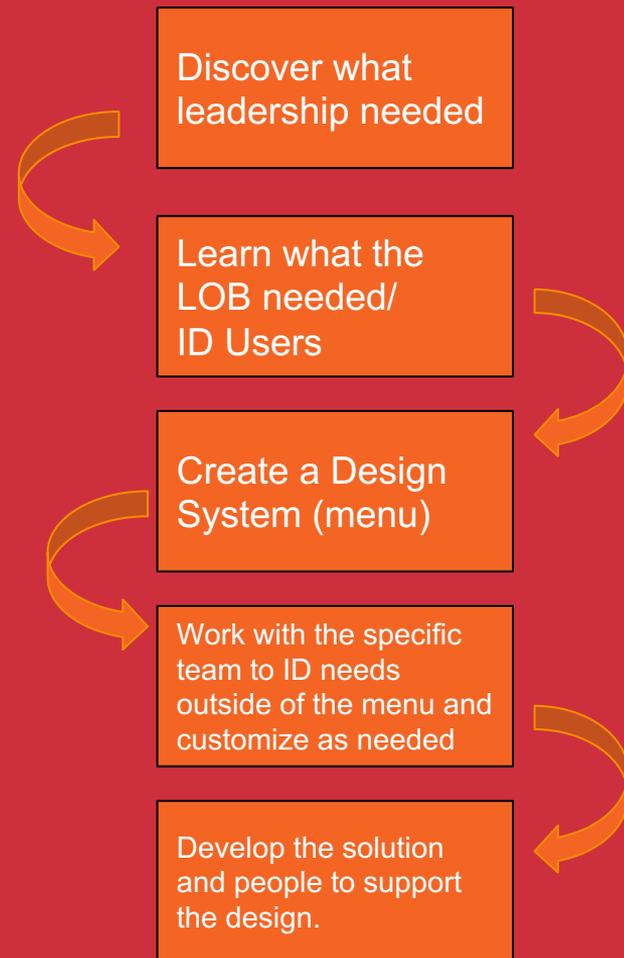
While the portfolio grew as far as clients so did the inventory within the design system.

New components were added as the system evolved based on new needs.

While not all new components were created as requested or some tech wasn't available other items were "parking lot" for resurfacing when technology became available. This documentation allowed leadership and stakeholders to explore additional needs. In cocreation, a big part of design requires capturing all ideas.

Examples:

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



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# The User insight

After the sprint was finished and I checked in with the site manager to see if her implementation planning was complete, the site went live.

Users were surveyed 2 days after launch and then 2 weeks later to check on needed updates/design changes. In the last survey they were also connected with the manager of the site for a pipeline back into the process.

We surveyed all users – we had access to this because users were required to log in to access the portal.



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# The end game

In July 2021, I had finished my last of the portals, I lost count after 95 – due to a reorg and the teams absorbing and morphing.

I had great praise from leadership. Was recognized for the innovation and I brought to the project.

Data showed people were using the sites daily, on top of that they had them open for long periods of time which meant they were a valued resources. High site traffic, click throughs and more.

Here are what my clients have 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.

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 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.

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!