

Eric Eng

Experience Director, NYC

www.ericeng.com



Hi, I'm Eric

- 15+ years leading cross-functional teams to build innovative experiences
- Focused on collaboration, data-driven insights, and exceeding client expectations
- Expertise in mentoring teams and fostering cultures of autonomy, growth, and innovation
- Proven track record of improving customer experiences and driving business outcomes
- Passion for empowering teams to deliver their best work
- Skilled in navigating organizational challenges in both agency and in-house

Companies I've worked with

WSJ

IBM

CHASE



publicis
sapient

NextGen Digital Experience

Prospect Browse Experience

Experience Strategy

Discovery

Concept Design

Verizon NextGen Digital

Prospect (first time /return)
customer experience
targeting top funnel browse
engagement and conversion.
Included initial discovery
territories through home and
landing page redesigns.

Organization

Verizon Wireless

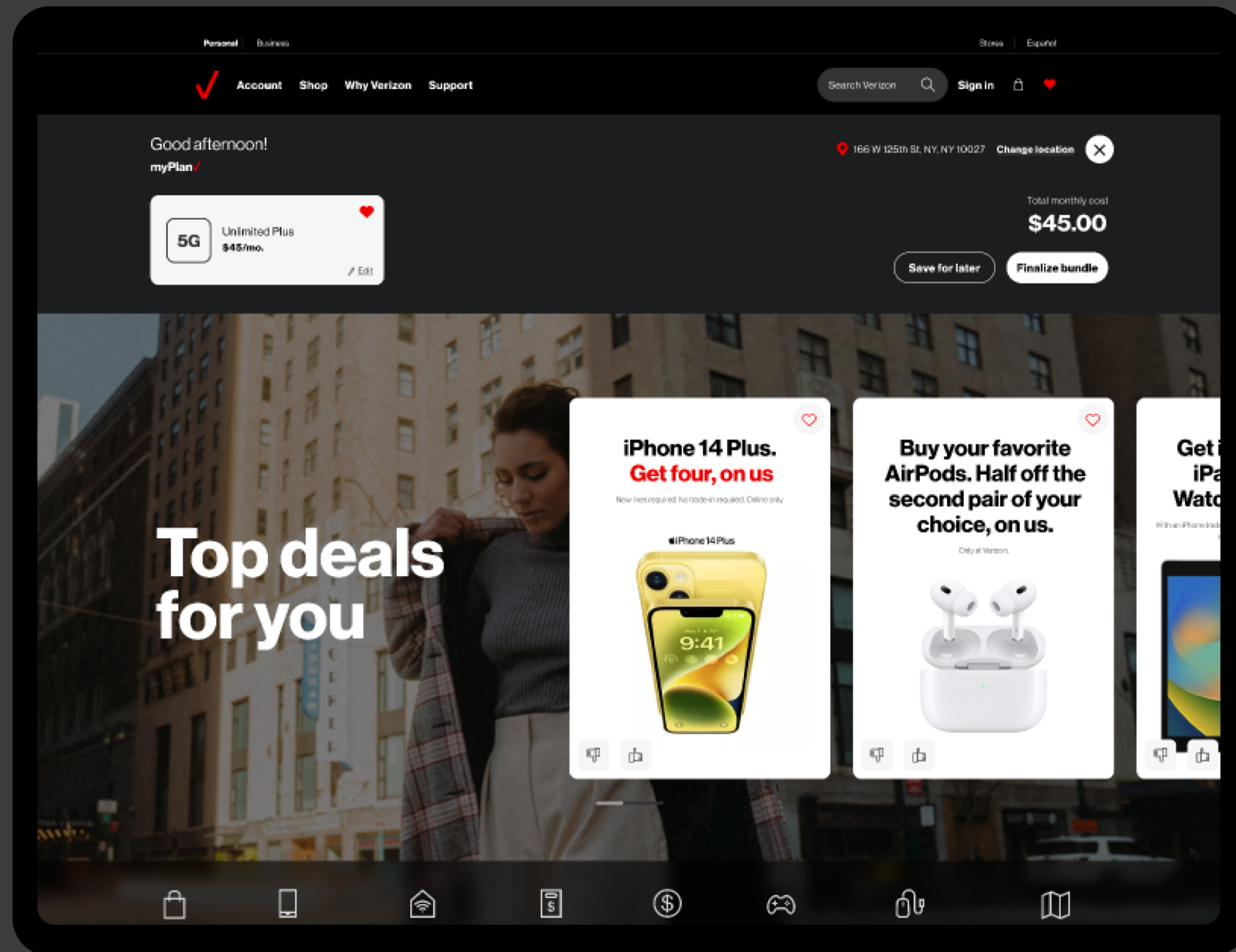
Role

Experience director

Team

12 designers, 2 strategy,
1 research

NextGen Digital Experience (verizon.com)



Key Business Objectives

Align the org around digital being the most personalized flagship destination

Increase prospect and customer conversion

Reinvent iteratively

Measure at all levels and prioritize continuously

Relentlessly eliminate wastage from idea to value lifecycle

Realign to customer needs

Key Experience Objectives

Reinvent .com experience based on key principles:

'Let's trust each other'

Don't mislead, create confusion, or take advantage.

'Show me the way'

Guide me every step of the way. I'm busy. Make this easy.

'Know me and show it'

Pay attention to my wants and needs, no matter where I am in the ecosystem.

Discovery Territories

Predictive Platform ✓

A predictive platform that understands you, an experience designed around you. Using anticipatory intelligence, your experience discovering the right plan, device and benefits just got smart — making your life simple.

Available for pickup today
Apple iPhone 14 Plus
Starts at \$25.83/mo
Start building

Boom! Ultra Wideband is available in your city

I'm interested in this offer

People like you also liked...

iPhone
256GB
Purple

Case with AirPods
Available for pickup today
Starts at \$14.00

NBA League Pass
The ultimate fan plan

Verizon & me

A lifestyle-led platform that relates to you on a human level and allows you to envision how Verizon enables your lifestyle to make it richer and more rewarding.

Welcome, Gamer. How can I help you?

5G Gaming Twitch Rivals

Current phone promotions

See my experience

Gaming on the Go
is now available for free download. Play today.

Belkin Boost Charge Power Bank
\$200

Xbox Game Pass
Assassin's Creed Valhalla
is now available for free download. Play today.
Watch now

Exclusively for Verizon Members

XBOX
STARBUCKS COFFEE

Simplified Shopping ✓

A simplified shopping platform that taking the complexity out of choice, streamlines the decision process and assists you in finding, configuring, and buying what you need.

Available for pickup today
Apple iPhone 14 Plus
Starts at \$25.83/mo
Start building

Apple iPhone 15
\$23.05/mo

Add Promotion

Shop by Device

Shop by Plan

My Favorites

Edit Preferences

Build your bundle
Bryant Park, NY

Apple iPhone 15
\$23.05/mo

Unlimited Ultimate plan
\$50.00/mo

Add another service or device

Verizon OS ✓

An operating system for all your digital connectivity needs - providing you the right information, notifications and tools at the right time to connect, protect, and manage every aspect of your life.

Add Family Member

Hi Gregory, let's set up service on your new iPad.

An update on Gregory's location
Gregory has arrived at school safely.

Create a group

Add a device

We've got recommendations to optimize you usage.

Monitor wifi
1 starter + 1 actions

Switch your perk

Link accounts
Starbucks
AMERICAN EXPRESS

hulu Disney+ ESPN+

Accounts Usage

Predictive Platform

Predictive Platform

Explorations

Immediately Relevant

Leverage all signals from unknown prospects to immediately start a relevant conversation on the very first visit.

Explore new horizons of connectivity from the comfort of your home.

5G Home Internet
Bryant Park, New York

Available now in Bryant Park

Switch to 5G Home Internet.

Start building

Ultra Wideband is available in your city

Bryant Park, New York

Available now in Bryant Park

iPhone 15 with Unlimited Ultimate

- Travel easier with high-speed international data, talk & text
- Work from anywhere with 60 GB premium mobile hotspot data
- Home internet as low as \$25/mo, service availability varies

Start building

Self Identify

Provide experiences to quickly self identify through browsing to continually contextualize the content and build a progressive profile.

When do you like to travel? Summer Winter

Recommended accessories

Explore products curated for your device or shop all accessories.

Shop recommendations

Show me something else

ZAGG Case with MagSafe In stock at Bryant Park Starts at \$54.99

Apple Watch Series 9 In stock at Bryant Park Starts at \$13.00/mo

Available for pickup today at Bryant Park

Apple iPhone 15

4 colors Starts at \$29.16/mo

Travel perks Remote access

Family add-ons

Your Verizon Preference

Profile Preference

OS Focus

How many phone lines are you looking for today? 1 2 3 4 5+

5G Smartphones Family focused Travel perks

Stay Relevant

Persistent context and relevancy to promote an easy, simple and relevant browse and shop experience.

Pick up where you left off

Apple iPhone 15 Starts at \$29.16/mo

Unlimited Ultimate Plan Starts at \$50/mo

Continue customizing

Save your progress

Enter your email

Available for pickup today

Get early as tomorrow

5G available in your area

Based on your last visit

Multi-line iPhone Travel perks 5G at Home Internet 256 GB

5G Smart Phones Bring your own device YouTube TV Tablets

Other items you recently viewed

ZAGG Case with MagSafe Available for pickup today Starts at \$54.99

The ultimate iPhone plan with Apple One \$55/line, shareable up to 5 people \$9.99/line perk savings

Start building

Save for later

Shop similar

Sign in with Google Sign in with Apple

Sign in with Facebook Welcome back!

Bryant Park, NY Pick up by 5:00 PM today

Looking for something new?

We recommend

Your phone

Apple iPhone 15 Starts at \$3611/mo

Available for pickup today at Bryant Park

Your plan

Unlimited Ultimate \$50/line

- 5G Ultra Wideband
- 60 GB premium mobile hotspot data
- Home internet as low as \$25/mo, service availability varies
- Limited time get Disney+ for a year on us!

Disney Bundle

Recommended for you

Otterbox Case \$49.99

Get it shipped by Feb 1 to 2/22/21

Recommended for you

Beats Studio buds

Available for pickup today at Bryant Park

Be Predictive & Proactive

Leverage what we learned from prospects and customers to predict and influence the right products and services at the right time.

Based on your last visit

Bryant Park, NY

Active filters based on browsing

iPhone 256 GB Movies

View all filters

Verizon AI

Ask us anything...

Based on what you've been checking out so far here are some suggestions

Family Plan Deals Compare iPhone 15 and iPhone 15 pro Current phone promotions

Entertainment your way, get streaming with any new line

hulu Streaming Perks with Hulu and Disney+ Includes 12 months free with a new line

Ultimate + Internet plan with Apple One

Apple One Bundle 2 Phone Lines + 5G Home Internet Starts at \$100/mo + includes free additional iPhone

Simplified Shopping

Simplified Shopping

Explorations

Simplify the Complex

Help customers make informed decisions and understand all their options so they can move through the experience efficiently, while retaining their context and progress.

\$20-30
 5G Pink
 5G Smartphones
 Bill Credit

Choose your plan

We've selected a few options that would be perfect for you.

Multi-line 5G
 International

Build your bundle Byland Park, NY Bundle Total \$23.05 Edit Preferences My Favorites

Your saved items is on sale

Elizabeth James case \$49.99 15% off cases and accessories

Apple iPhone 15 \$23.05/mo
 Unlimited Ultimate plan \$55.00/mo
 Add another service or device

My Favorites

- Apple iPhone 15 Starts at \$23.05/mo
- Apple iPhone 14 Plus Starts at \$25.63/mo
- Apple AirPods Pro (2nd Gen) \$349.99

Add from your saved items

- iPhone 13 \$17.49/mo
- iPhone 12 \$18.05/mo
- iPhone XS \$15.07/mo

Disney Bundle for \$0/mo
 When you bundle with your saved device Add Promotion

Match Shopper Intent

Present new customers with starting points that match their intentions and make it easy to configure across product, plans and promotions.

Shop Mobile Shop Home

- Shop by phone →
- Shop by plan →
- Ways to shop →
- Brands →

Shop by phone

Dynamic Pricing

iPhone 15 Change phone \$23.05/mo

Your plan Choose your unlimited option.

Recommended
 Unlimited Ultimate \$55/line*
 Everything in Unlimited Plus with double the mobile hotspot data, international connectivity and more.
 + Up to 50% off 2 watch, tablet, hotspot or Hum plans
Selected

Unlimited Plus \$45/line*
 Our reliable, fastest 5G, up to 10x faster than 4G LTE. No matter how much you use.
 + Up to 50% off 1 watch, tablet, hotspot or Hum plan
Select

Your perks Save on the perks you want. Select 2 free with your Unlimited Ultimate Plan. Each additional is just \$10/mo.

Disney Bundle \$0/mo \$8.99/mo Details
 Apple One \$0/mo \$12.99/mo Details

Customize your iPhone Edit
 Color Storage 128 GB New customer
 Buy new phone Payment for 36 months

Save for later Buy

Shop by plan

Your plan Change plan

Unlimited Ultimate \$55/line*
Everything in Unlimited Plus with double the mobile hotspot data, international connectivity and more.
+ Up to 50% off 2 watch, tablet, hotspot or Hum plans

Your perks Edit

Disney Bundle \$0/mo \$8.99/mo Details
 Apple One \$0/mo \$12.99/mo Details

Recommended phones for you Select your phone.

Buy new phone Trade-in Bring my own

Recommended
 iPhone 15 \$23.05/mo
 iPhone 14 Plus \$20.05/mo
 iPhone 14 \$18.12/mo

Free phones for your new line

Get it free.
 Apple iPhone 13 Starts at \$0/mo \$10.49/mo Details for 36 months, 0% APR
 Apple iPhone 11 Pro (Certified Pre-Owned) Starts at \$0/mo \$16.43/mo Details for 36 months, 0% APR
 Apple iPhone XS (Certified Pre-Owned) Starts at \$0/mo \$16.43/mo Details for 36 months, 0% APR

Save for later Buy

Be Clear & Transparent

From pricing to promotions, bundles to perks, always be clear and transparent so customers understand what they are getting and how to get it.

Popular plan combos with Unlimited Ultimate

The Ultimate iPhone plan with Apple One \$65.65/mo \$9.95/line perk savings
 Apple One Music, TV+, Arcade, iCloud+

For easy shopping, savings & more \$40/line/mo \$2.95/line perk savings
 Walmart+ Membership

SmartWatch Data & Safety \$10/mo Save \$10/mo
 50% off 2 watch, tablet, hotspot or vns Apply Promotion

Unlimited Ultimate \$55/line*
 Everything in Unlimited Plus with double the mobile hotspot data, international connectivity and more.

Add another service or device

One Price \$83/mo
 Get an all-in price with no hidden fees.
 iPhone 14 Plus Starts at \$0.00/mo
 Unlimited Welcome \$30/line*
 Our reliable, fast 5G
Save for later

Free phones for your new line
 Get early as tomorrow

Your Savings

Your selections and current promotions will save you \$35/mo.

Annual Savings

Your Bundle Edit

- Apple iPhone 15 128 GB Pink \$23.05/mo for 36 months, 0% APR, \$35 act. fee (incl on first bill)
- Unlimited Ultimate \$55.00/mo
- Disney Bundle \$0/month \$8.99/mo Details

Due Today \$0.00
 Estimated Monthly Bill \$78.05

What color do you want?

Pink Black Blue Green Yellow Save

Verizon & me

Verizon & me

Explorations

Verizon is the key to hassle free travel

If you travel 3 or more times a year, here's how Verizon can help.

[See my experience](#)

5G

The Gamer

Parental Controls

The Parent

Entertainment

The Traveler

International plans

The Entrepreneur

Airpods Pro
\$200.00

Relate to Life

Meet customers where they are, whatever their lifestyle, interests and needs may be to immediately make a human connection.

Everything you need [Customize](#) [Buy now](#)

plus save over \$220

How many times per year do you travel internationally?

1 2 3 4 5+

When do you like to travel?

Summer Winter

Be Inspirational

Tailor fit plans and promotions that match and inspire customers to live the life they want.

Elevate your experience with a bundle and save over \$220

Your device

Belkin **Power Bank 10k** \$49.98 ~~\$69.98~~

Available for pickup today at Bryant Park

Your audio

Apple **Airpods Pro** \$200 ~~\$349.99~~

Available for pickup today at Bryant Park

Your Add-on

Verizon Device Protection \$10/mo ~~was \$17/mo~~

- Unlimited Claims
- No extra cost cracked screen repairs
- Pop On the Go
- \$69 damage deductible

Airpods Pro (2nd Gen) \$200

Stay connected on your upcoming trip

3 TravelPass Days with Unlimited Plans \$0/day ~~was \$10/day~~

- Get unlimited talk, text and data* in Portugal for 3 full days
- A 24-hour TravelPass session starts automatically when you use your phone in any TravelPass country
- Avoid pay as you go rates

3 TravelPass Days + Verizon Mobile Protect \$10/month ~~was \$17/month~~

- Get unlimited talk, text and data* in Portugal for 3 full days
- Get device protection on the go
- No extra cost cracked screen repairs

Recommended for you

3 TravelPass Days + Streaming for Travel Bundle \$6.99/mo ~~was \$10/mo~~

- Bundle TravelPass, Netflix and Max at one low cost
- A wide selection of movies and shows for long plane rides to far away lands
- Watch from anywhere in the world at one set price

Always Customized. Always Rewarding.

Allow prospects and customers to envision and customize a rewarding Verizon experience.

Verizon Member Exclusive

EUROPE'S GREATEST TRAIN JOURNEYS

YouTube TV

Included 6 months free for new customers

Luxury travel for Verizon VIPs

Get early access to one of the largest airport lounges at 17,000 sq feet ahead of its opening in 2026

Travel Accessories

Charger

For the length of your trip, we recommend a TravelPass

Best option for your usage history.

patagonia

Save 10% at Patagonia

Save \$14 vs. Pay as You Go

Unlimited talk, text, and data

TravelPass \$10/line per day

Get unlimited talk text and data* in 210+ countries and destinations.

[Add TravelPass](#)

Redeem your benefits immediately

NIKE XBOX STARBUCKS WWF

Smart Family

Peace of mind for you. Freedom for them.

Manage Trusted Contacts

Schedule pickup

Kids can share location with their parents.

Manage your plan

Device protection | Parental controls | Location tracking

Get the most out of your new Xbox

Monthly Perks

Member Only Game DLC

Assassin's Creed Valhalla is now available for free download. Play today.

In need of a controller?

Get one month of Xbox Game Pass Ultimate, on us.

JLab GO Headset \$49.99

V3 Gaming Mouse \$69.99



Let's contribute together.

Verizon OS

Verizon OS

Explorations

Be a platform for Connection

Simplify customer lives by connecting everything that is important to them in and outside of Verizon

Let's connect your car

Link accounts

What new movies are you streaming?

Your account

Ready to add another line to your account?

Swap your device.

Be Indispensable. Continuously Valuable.

An indispensable ecosystem that continuously enables, simplifies and add value to customers

Exclusive perks for you

Deal just for you

Tickets for you

Your Health Goals

Switch and make the most out of your bundle

How else can we help you?

Sara's Afternoon Run

Stay connected with high quality streaming

Always On. Always Intelligent.

Continuously monitoring and proactively updating customers with most essential information to make life more informed and simple.

What can we help with?

Hi Gregory, let's set up service on your new iPad.

Get automated

Household Routines

Gregory's Devices

Accounts Usage

Apple iPad Mini (2021)

Screen Time

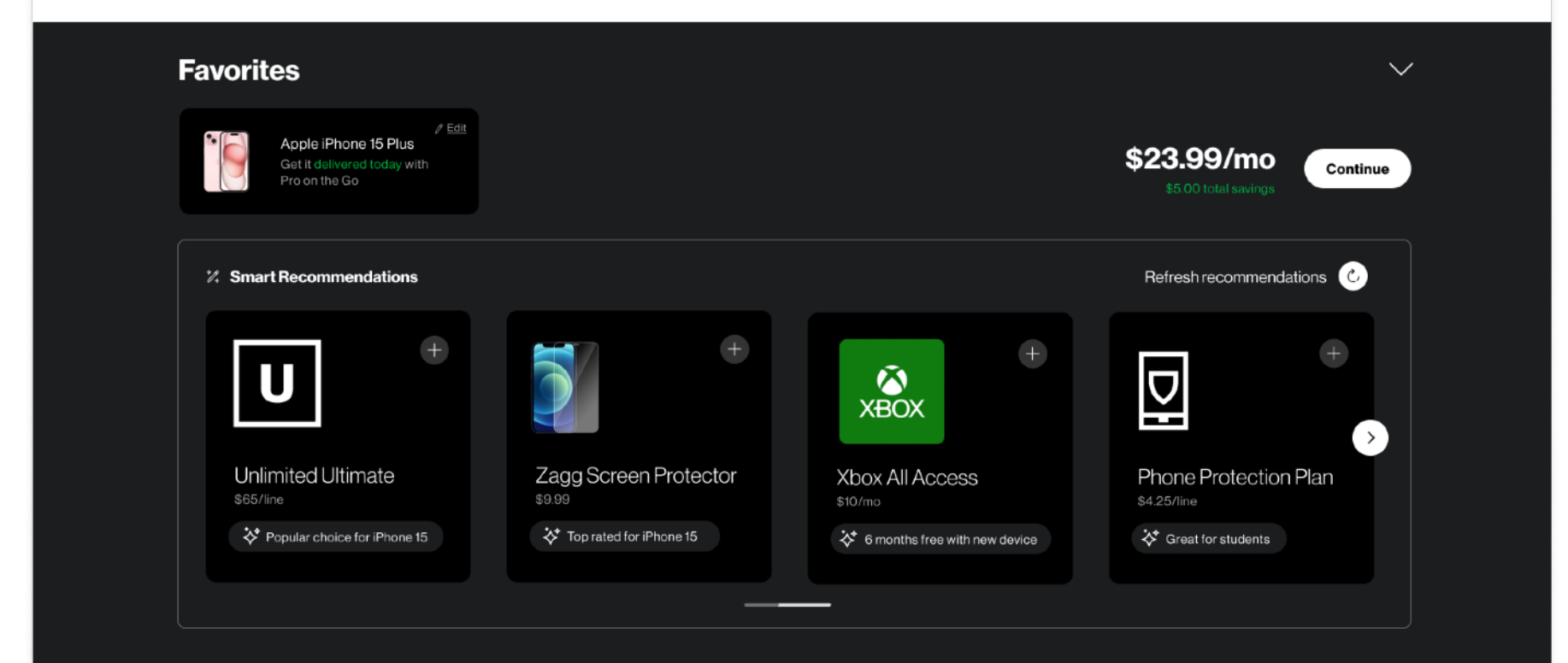
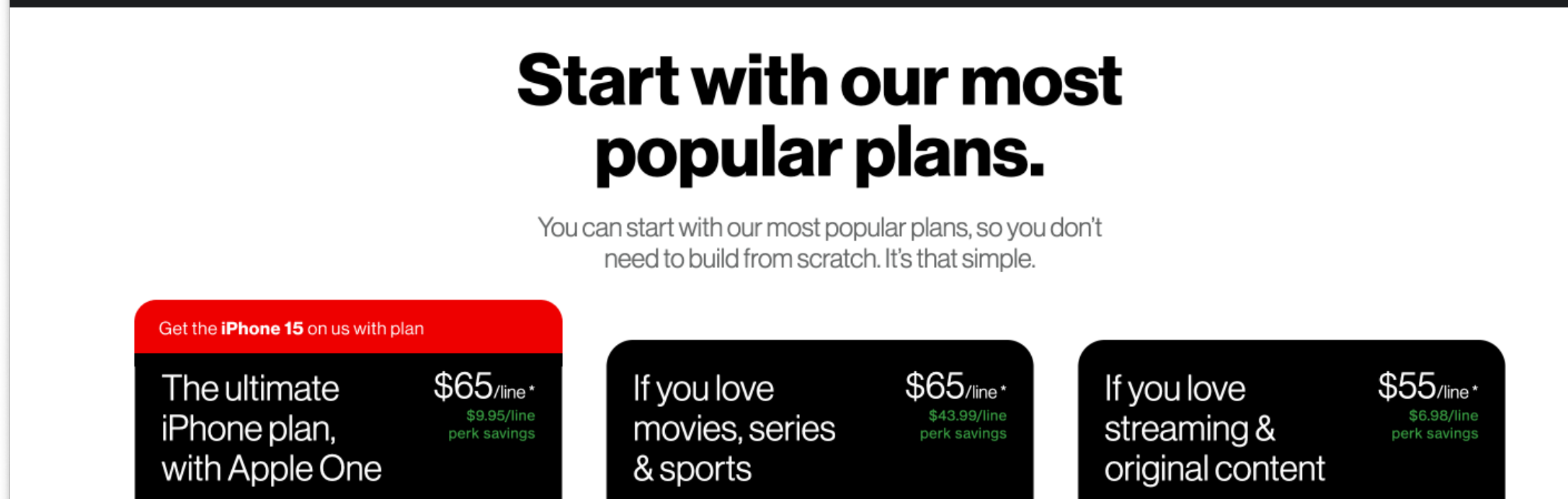
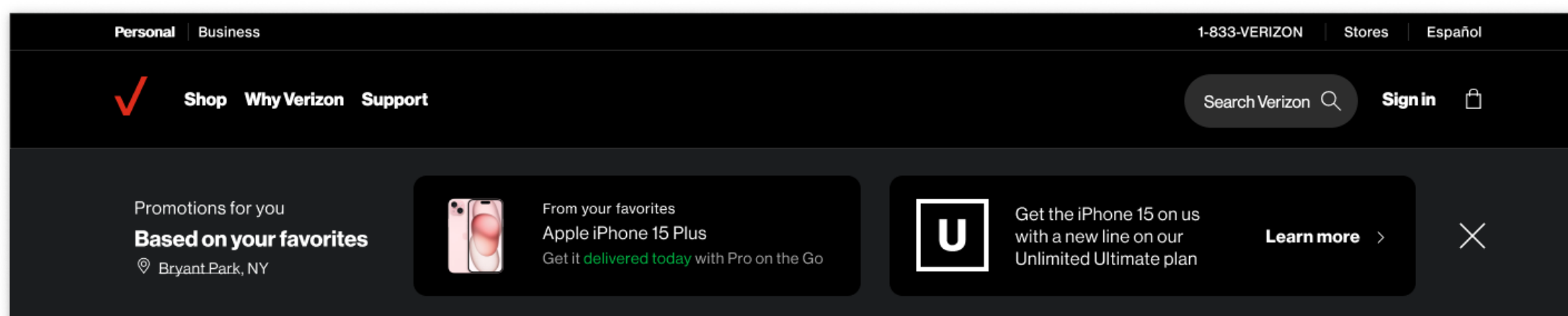
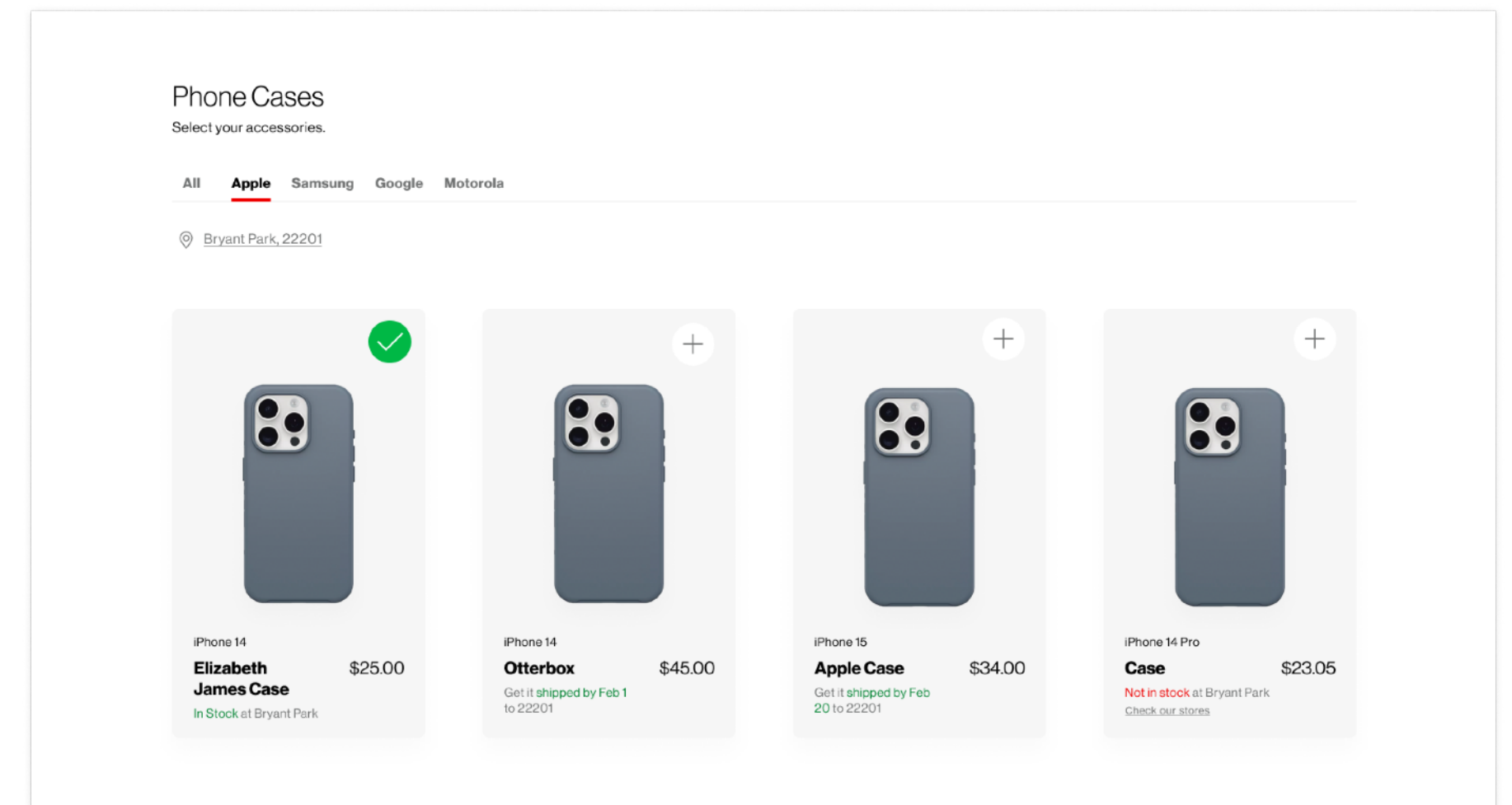
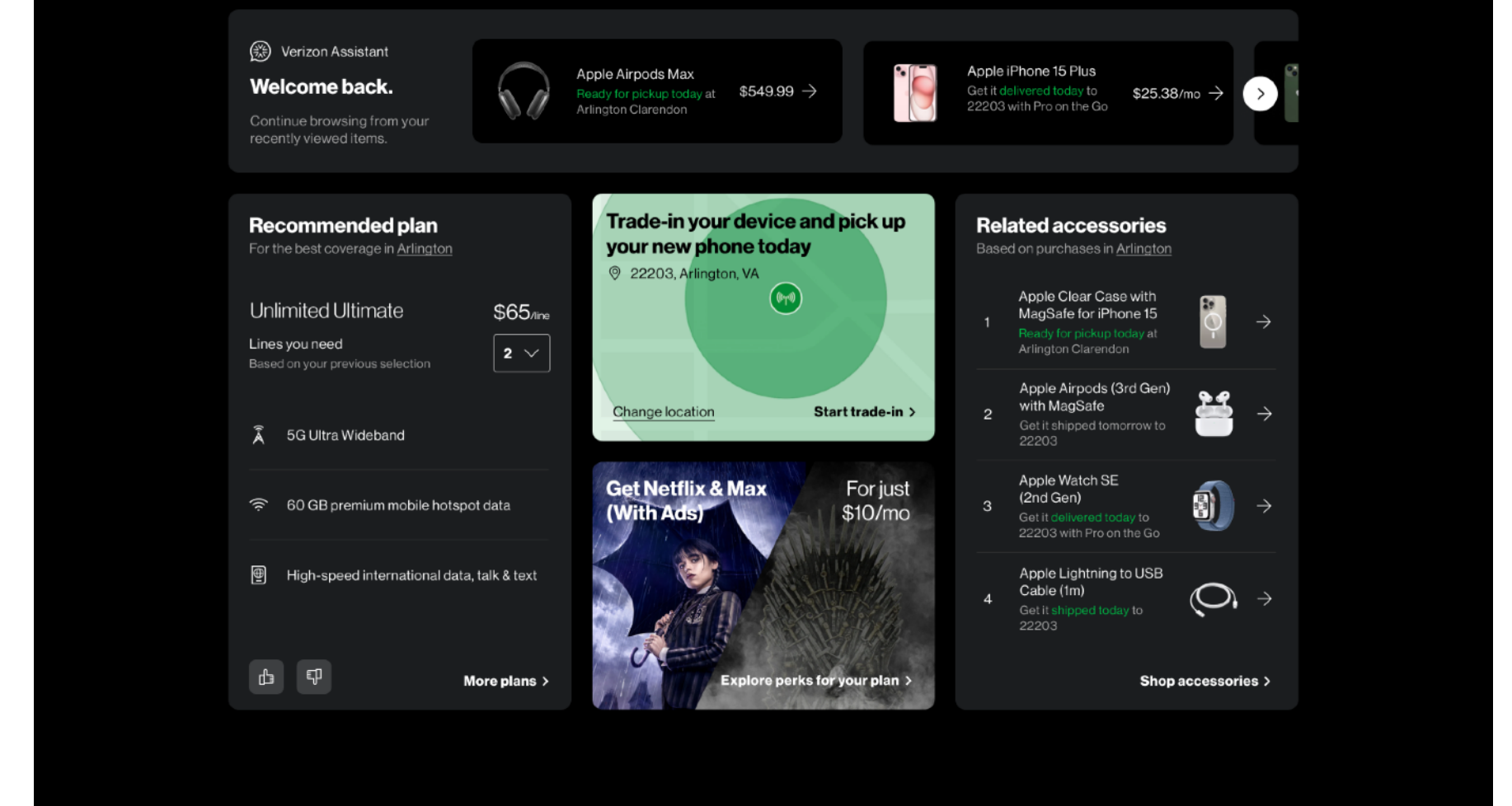
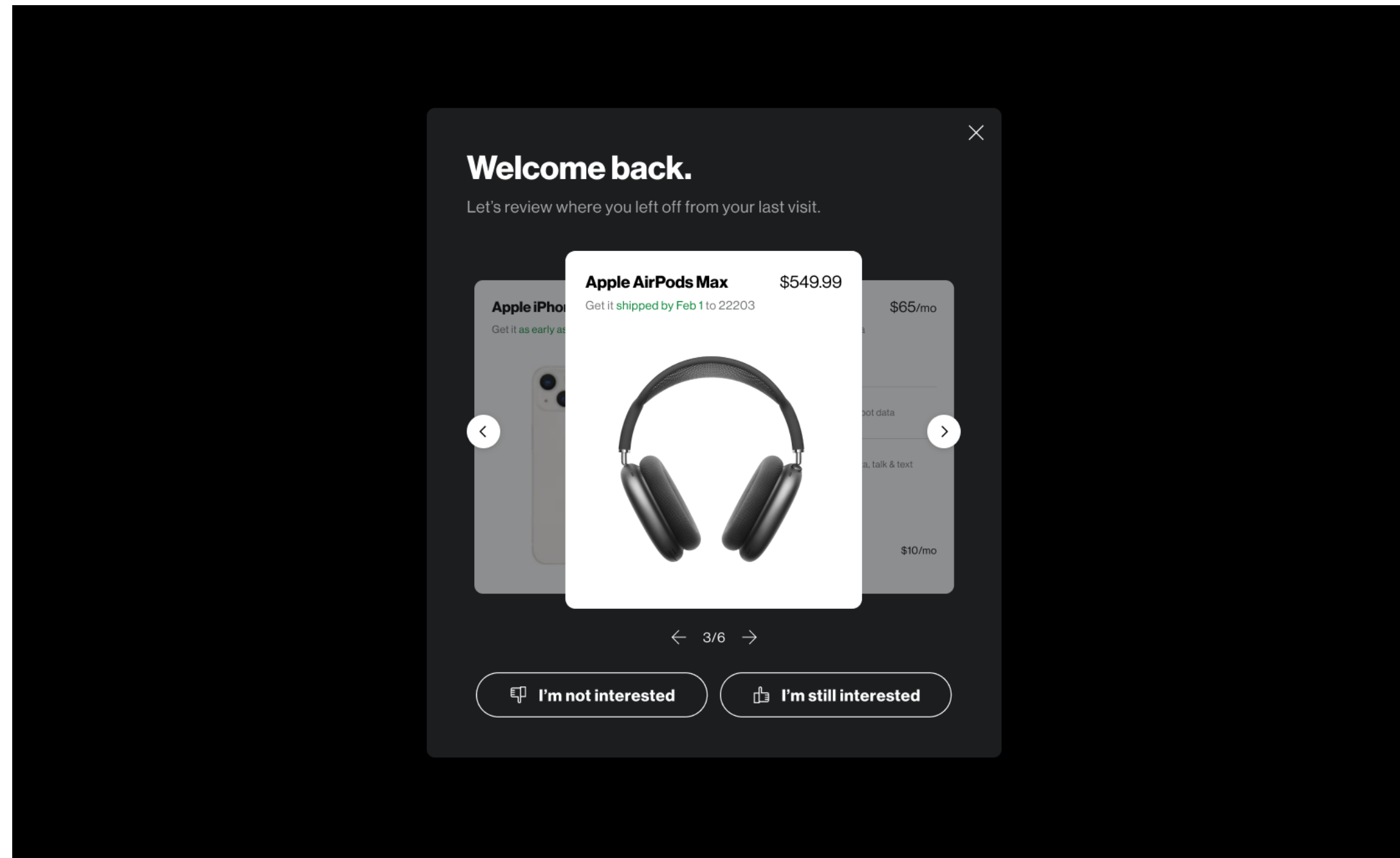
Texting

Set app limits

An update on Gregory's location

Front door opened

User research - concept testing



User research - concept testing



Research Method

Remote, usability testing
60-70 minute sessions



Sample Size & Definition

9 prospective Verizon customers

Mix of Account Owners / Managers

3 climbers
6 extenders

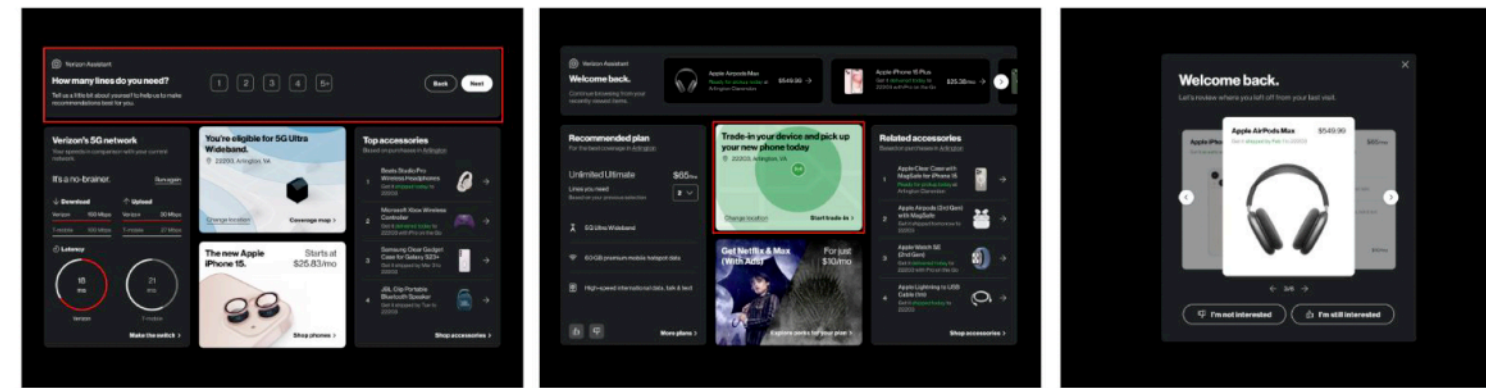
Mix of gender identities, ages (21-65), ethnicities, and household incomes

Evaluated Stimuli:

RC1 (Browse): 'Concept & Test' Research Stimuli

Includes aspects of "Browse fulfillment preview" Epic

Epic 1 - Tailored Content on Return Visit



E1-1 [First time experience]

E1-2 [Return experience]

E1-3 [Return experience - modal]

Customer explores devices and accessories before returning

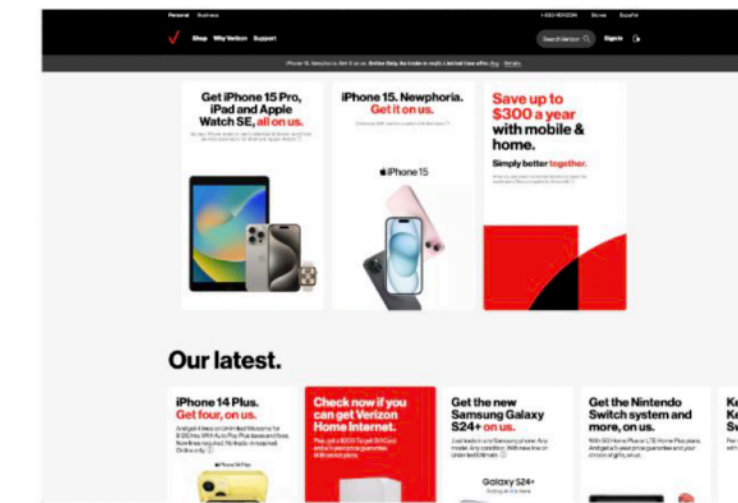


Verizon confidential and proprietary. Unauthorized disclosure, reproduction or other use prohibited.

8

Evaluated Stimuli: BAU

Epic 1 - Tailored Content on Return Visit



E1-1D [Current home page]

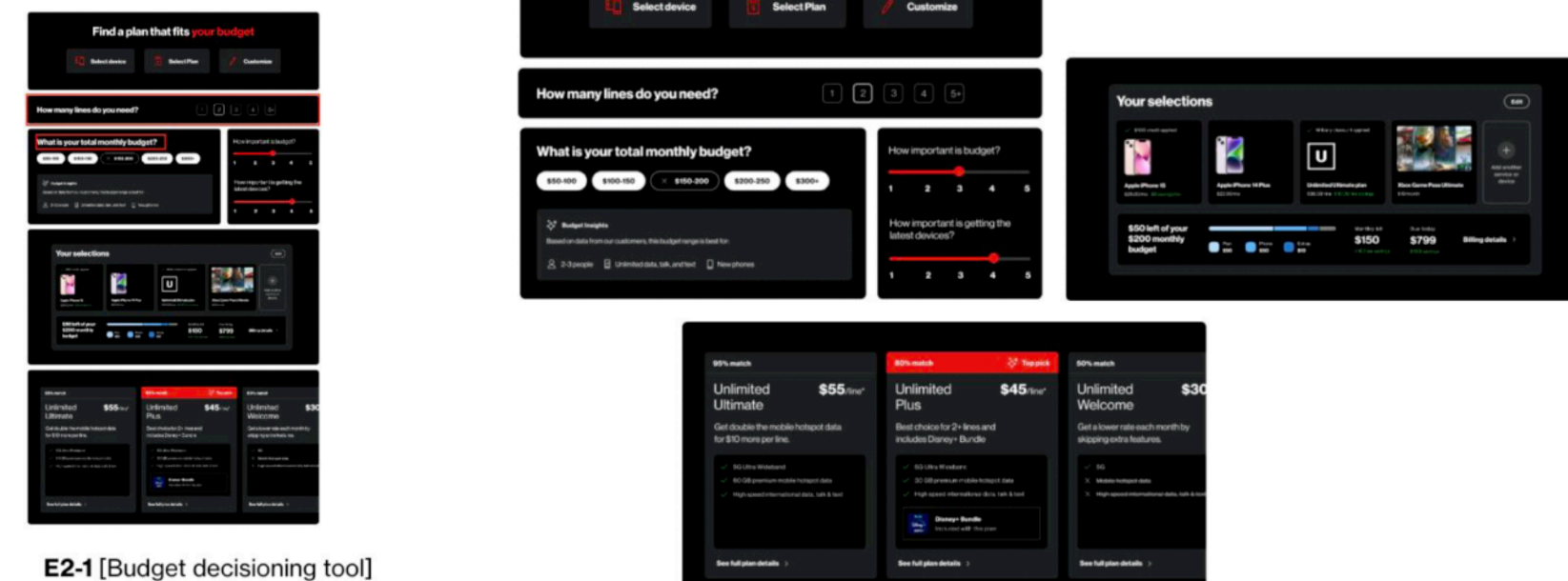


Verizon confidential and proprietary. Unauthorized disclosure, reproduction or other use prohibited.

9

Evaluated Stimuli:

Epic 2 - Browse by Budget



E2-1 [Budget deciding tool]

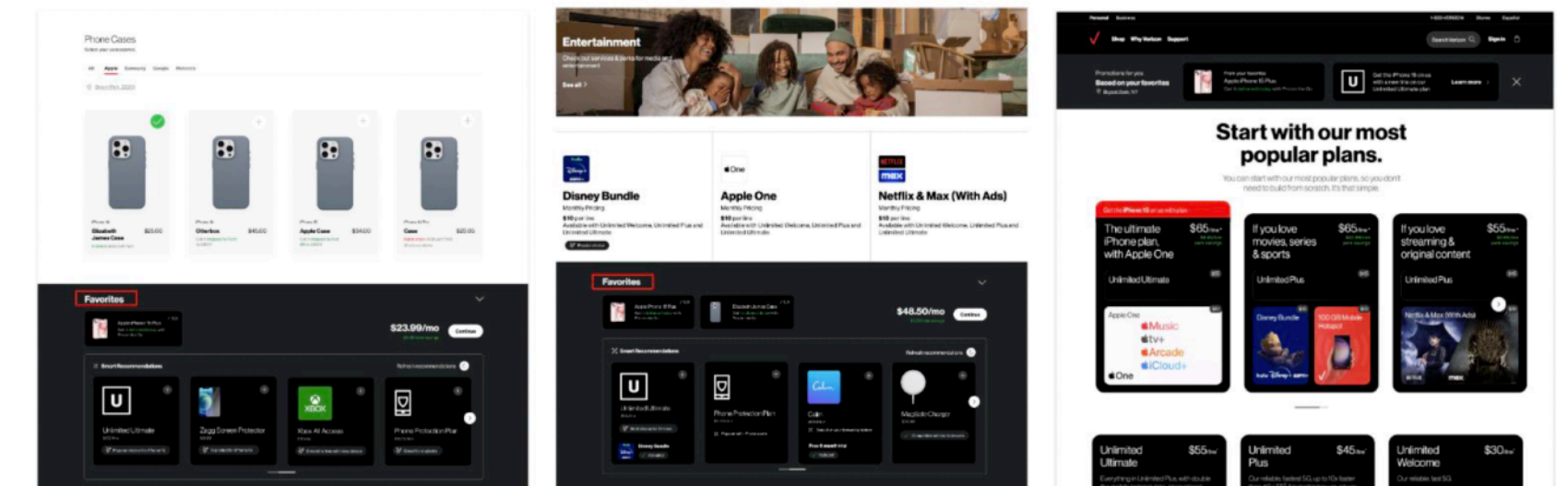


Verizon confidential and proprietary. Unauthorized disclosure, reproduction or other use prohibited.

10

Evaluated Stimuli:

Epic 4 - Persistent Access to Browse & Shop Tools



E4-1 [Favorites with smart recs (pg 1)]

E4-2 [Favorites with smart recs (pg 2)]

E4-3 [Device/Plan promotion]



Verizon confidential and proprietary. Unauthorized disclosure, reproduction or other use prohibited.

11

User research - concept testing findings

While some content was helpful in showcasing the benefits of Verizon, users felt they were being upsold

First impressions of first time visitor experience:

- + Most notice the Verizon Assistant and would like to interact with it by answering how many lines they have
- + Most appreciate the specificity of the question from the first page as it feels they can customize the kind of plan they want from the get go
- + Users wonder what kind of questions they'd be asked next but assume they will be questions to further understand their wants and needs from a phone provider.
- + Most notice the 5G network comparison to T Mobile and appreciate the competitive data as it leaves the user intrigued to learn more about Verizon's benefits
- + They find the data very compelling and a time-saver instead of having to go searching for comparisons like this one on the internet.

Unlike the usefulness of the VZ Assistant and 5G network comparison, users found some content within the page to be unhelpful in determining the benefits of switching providers:

- + Some users thought the top accessories section was randomly placed and had the intention of upselling the new customers.
- + These users would like to see more devices like iPhones or tablets that they can get for a discounted price when purchasing a plan.
- + Some users would like to use this space for more comparison data to show the benefits of switching providers
- + One user would prefer to see information about how to contact Verizon support (email or text) instead.

✓

Verizon, the Verizon logo, and all other marks contained herein are trademarks of Verizon Wireless. All other marks contained herein are the property of their respective owners. © 2018 Verizon Wireless. All rights reserved.

- Mitigate upselling feel within experience
- Leverage assistant UX for entry
- Don't overload users with too much content

Users would not be confident in making the switch to Verizon just yet

Most users knew that their location and current provider info was being collected by Verizon.

- + While they understand why the information is being collected for a more personalized experience, users were hoping/assuming they were asked before giving out that information.
- + If not asked, users felt it was invasive.
- + *"I like that they use my information to give me useful data, but if they didn't ask me first or let me know that they're doing this I would find it super invasive."*

While users thought some of the content was useful in helping them determine if Verizon is worth switching providers for, they would not be confident in making the decision to switch yet.

- + Users would like to continue with the Verizon assistant questionnaire to see what kind of plans or other useful information they come up with before committing to anything.
- + Some users felt the ads/promos could have been better or more enticing (ex. Free devices, bundles, etc.) to know exactly what kinds of deals Verizon can offer them.
- + Interestingly, most climbers said they would want to get on the phone with a rep before making a decision to switch to make sure they understand the plans they choose and that they don't miss anything important (ex. Fine print information like taxes and fees)

✓

Verizon, the Verizon logo, and all other marks contained herein are trademarks of Verizon Wireless. All other marks contained herein are the property of their respective owners. © 2018 Verizon Wireless. All rights reserved.

- Make customers aware upfront of data collection and intended usage
- Explore more self-service experiences/tools

Users like the content of second-time visitor page but think Verizon can push further into personalization

First impressions of second time visitor experience:

- + Some users liked the recently viewed items, but would like Verizon to go further and offer deals associated with the devices to make it more appealing.
- + Most users like the idea of a recommended plan and how it shows cost per line and details of the plan.
- + However, users would like to customize the plan by adding more lines, devices, and bundles on the same page.
- + Users would also like more transparency like price totals (with taxes and fees) and to read the fine print.
- + While they notice the 'more plans' button, users would like to see more plan options on this page - maybe another plan option that is a better version of the recommended plan.
- + Most users felt the promos on this page were better than the ones on the first time visitor page.
- + *"I think the netflix ad is relatable to everyone since I think everyone streams shows and movies and I like that you can see if you can trade in your phone because when I look for new plans I want to see if there might be opportunities for an upgrade."*
- + Users would still like to see more promos about free devices.

While users thought the recommended plan and recently reviewed devices were a good start in the right direction of personalization, they felt the related accessories section was the least helpful and once again, an upsell.

- + Some users said to remove the related accessories and add useful information like more plan options or promos that appeal to new customers (like iPhone on us)

✓

Verizon, the Verizon logo, and all other marks contained herein are trademarks of Verizon Wireless. All other marks contained herein are the property of their respective owners. © 2018 Verizon Wireless. All rights reserved.

- Continue to pursue return UX personalization with relevant offers
- 'Pickup where you left off' pattern was desirable (minus accessories feeling like upsell)

Users are willing to give more personal information to Verizon

When asked how they felt about Verizon keeping their personal information to build a personalized experience, users understood why they would do it and encourages Verizon to use this info to create more useful/informative content.

- + Some users feel Verizon values them as potential customers by putting in the time to figure out what they want and suggesting recommended plans.
- + A few users are a bit disappointed with the level of personalization Verizon built and expected more from the information they have of them.
- + *"If I'm going to give my information away I would expect some helpful information in return. Like I expected them to give me more ads on what I want or more comparisons to T mobile to bring more value to using Verizon services. I would think they have enough information to give me that kind of data."*

To create a more personalized experience, users said they were willing to give out more information:

- + Some users are willing to give out the details of their current plan so they can compare and contrast which phone service has better benefits and pricing.
- + Some users expect to give out services they need and are interested in by completing the Verizon assistant questionnaire (ex. Lines, streaming services, devices, data usage, etc)

✓

Verizon, the Verizon logo, and all other marks contained herein are trademarks of Verizon Wireless. All other marks contained herein are the property of their respective owners. © 2018 Verizon Wireless. All rights reserved.

- Continue to explore ways to collect user-provided info/preferences to drive personalization and relevancy
- Explore comparison tool for plan benefits for switchers

Favoriting items and smart recommendations give users a more personalized experience

First impressions of Browse and shop experience:

- + Most like the concept of favoriting items across the Verizon site
- + They find value in favoriting items so if they leave the site and come back they can pick up where they left off
- + However, there was one user who really disliked the favoriting tool design because it looks like a checkout page.
- + Most like the smart recommendations as long as they are relevant and useful
- + Most users found most of the smart recs to be targeted and personalized based on their favorited items - they especially liked the bundle that was added to one of the smart rec plans.
- + Most users like the popular plans as they customize each plan for a specific type of person (based on their interests)
- + Users like the variety of bundles you can get with each plan
- + Users like the variety of options and expect to be able to mix and match or customize the plans to their liking
- + Only one user saw the "get iPhone on us" promo that was based on favorites
- + A couple users thought the plans were too overwhelming and had more questions than answers- it was picture-heavy and not enough detail about the plans themselves (would want a checklist like in budgeting tool plans)

✓

Verizon, the Verizon logo, and all other marks contained herein are trademarks of Verizon Wireless. All other marks contained herein are the property of their respective owners. © 2018 Verizon Wireless. All rights reserved.

- Continue to explore ways to review/see history
- Plan builder tool (with customizable popular plans)
- Smart Recs refinements on data/user behavior leveraged

Most value the budgeting tool as a way to customize their plans

Budgeting approaches:

- + Most users have no specific approach to budgeting, they just want to be able to get a good deal based on what they need or want currently.

First impressions of budgeting tool experience:

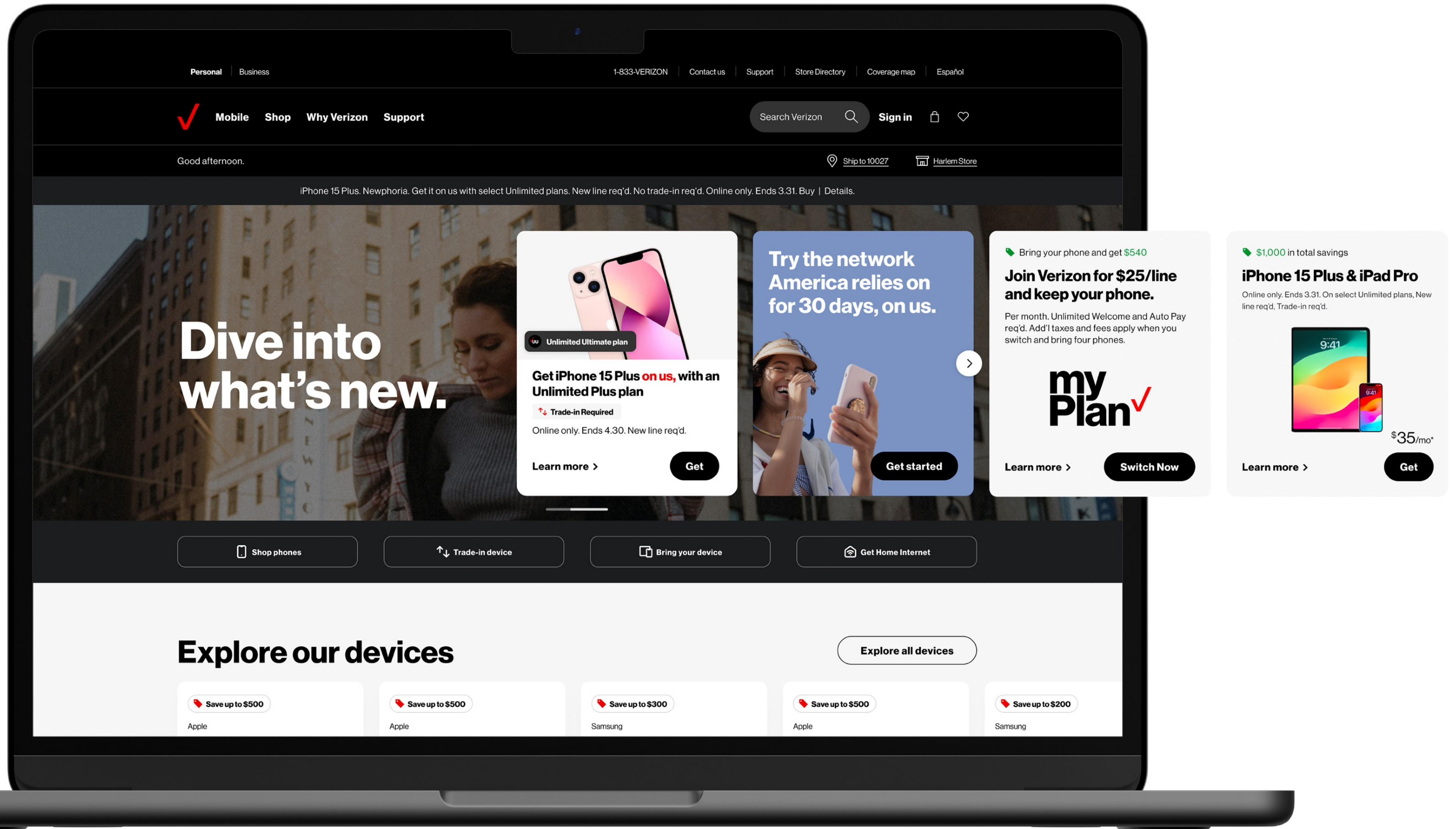
- + Most users like the no. of lines and budgeting questions
- + Users feel like Verizon is taking their limitations on budget into consideration, they like how specific the questions are
- + *"Gives you the feeling of transparency, there's something at Verizon that can work for you even if you only want to pay 100. Gives you more decision making power, you can customize it to make a bundle that works for me."*
- + However, a few users feel like the questions are too broad which can create more limitations on plan options than opportunities, especially if budget is not a top priority for them.
- + Most users like the "your selections" section
- + Users appreciate the level of pricing breakdown on the page, how much they will be saving, and how much they have left to spend on their budget
- + However, some users are not sure if the taxes and fees are included in this price breakdown so they would like that information to be more transparent
- + Even though most users felt like they can trust Verizon's price transparency, they would still click into billing details to make sure they're not missing anything.
- + A few users liked the recommended plans
- + They like the details within each plan, listing out the benefits and services included
- + Most would click in to see full plan details
- + While some liked and appreciated the budget match concept, some users were confused with the match concept as they didn't know that it was associated with how they answered the budgeting tool questions.

✓

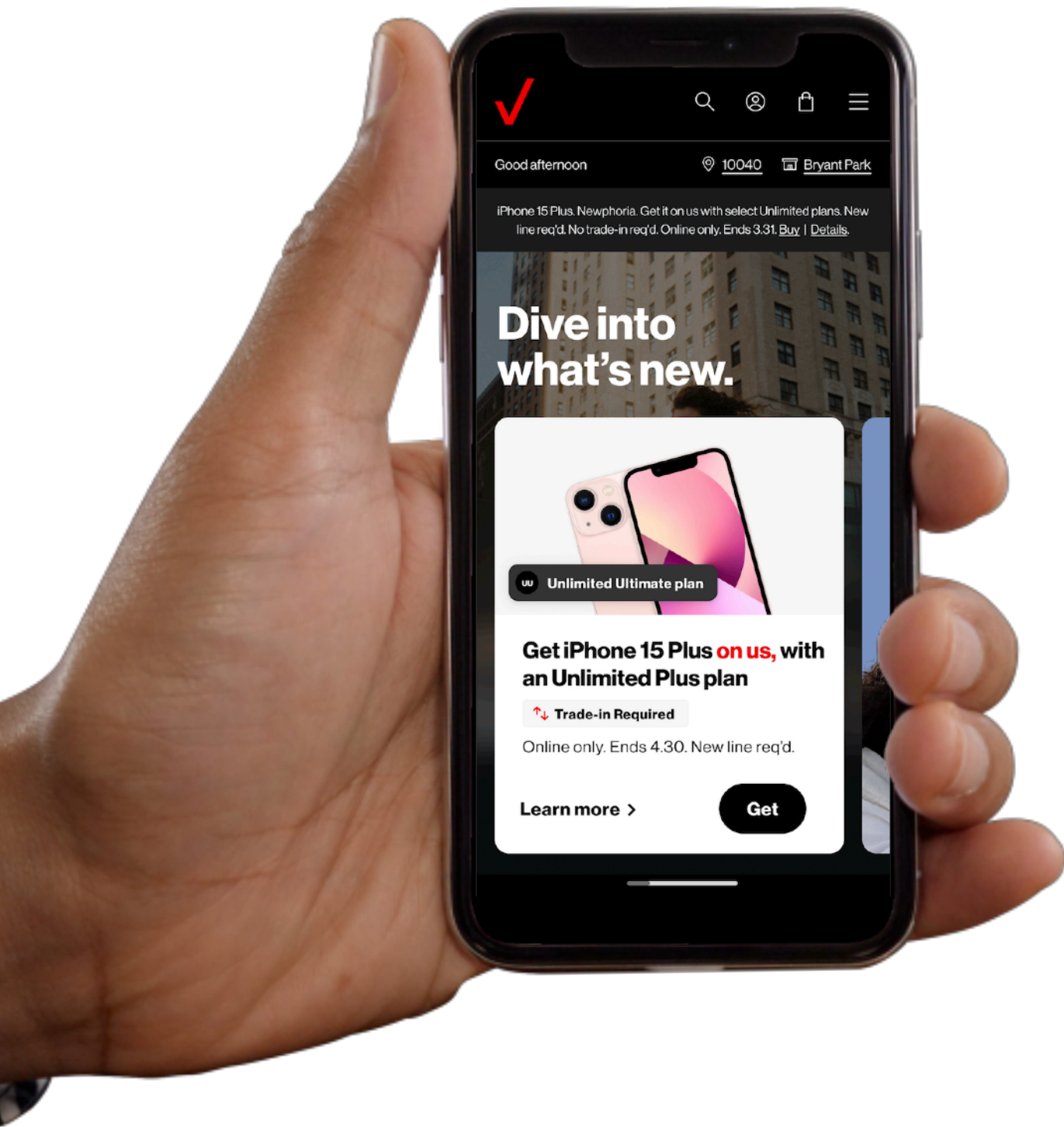
Verizon, the Verizon logo, and all other marks contained herein are trademarks of Verizon Wireless. All other marks contained herein are the property of their respective owners. © 2018 Verizon Wireless. All rights reserved.

- Budgeting could be rolled into broader plan comparison tool
- Continue pushing for pricing transparency early in journey

Homepage redesign - browse UX



Homepage redesign - browse UX

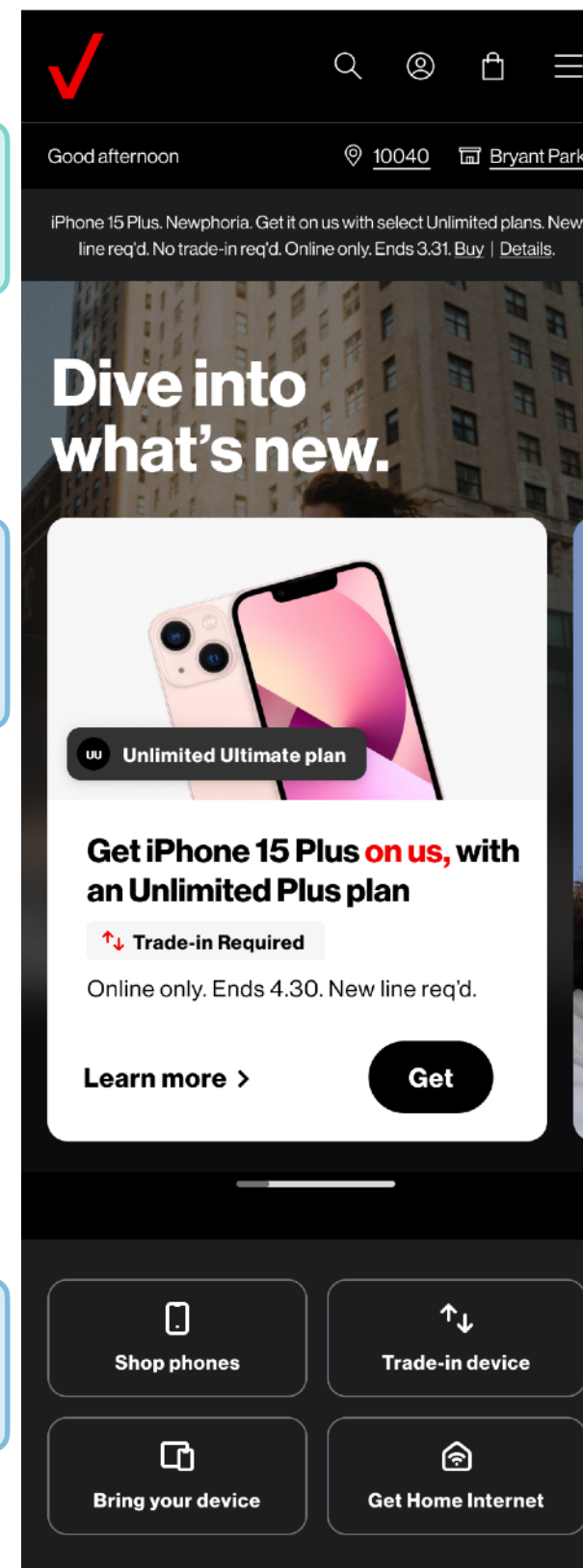


Personalized greeting, geolocation for shipping and local store

Reimagined hero tiles that introduce rapid path to purchase and learn opportunity

Quick actions to top visited pages from homepage (intent-based)

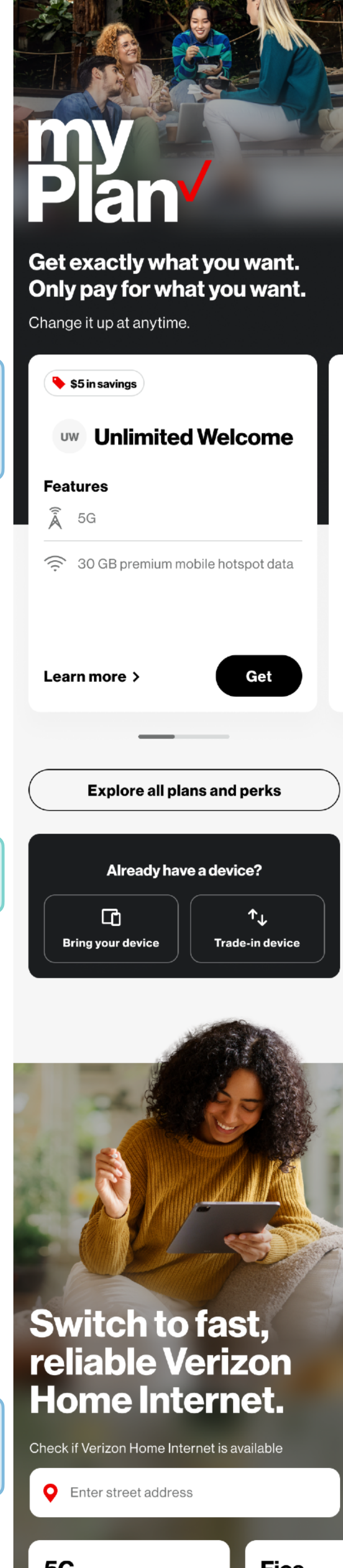
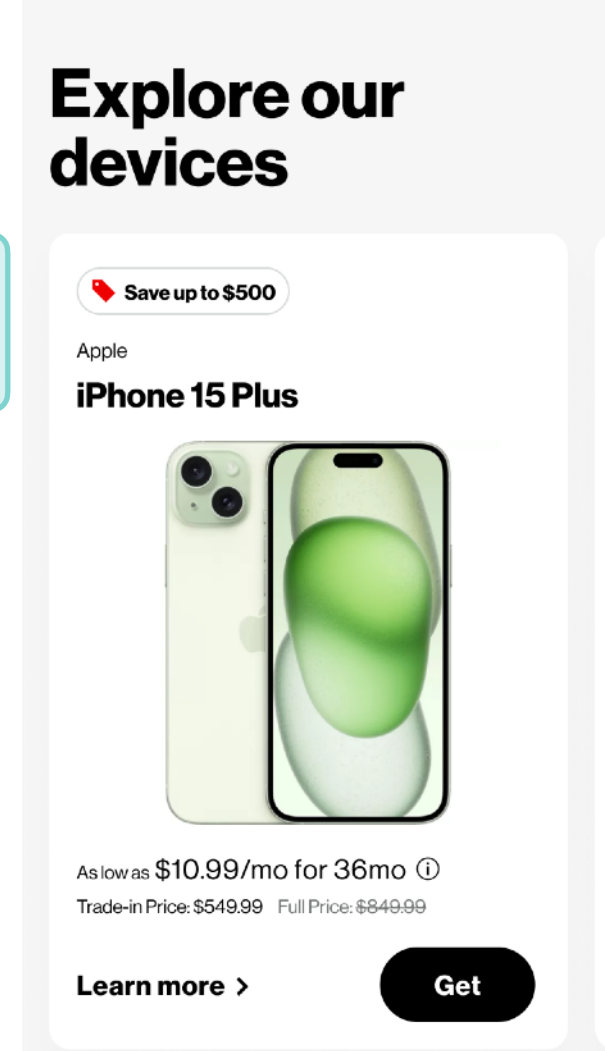
Relevant device tiles displayed based on customer signals/pref



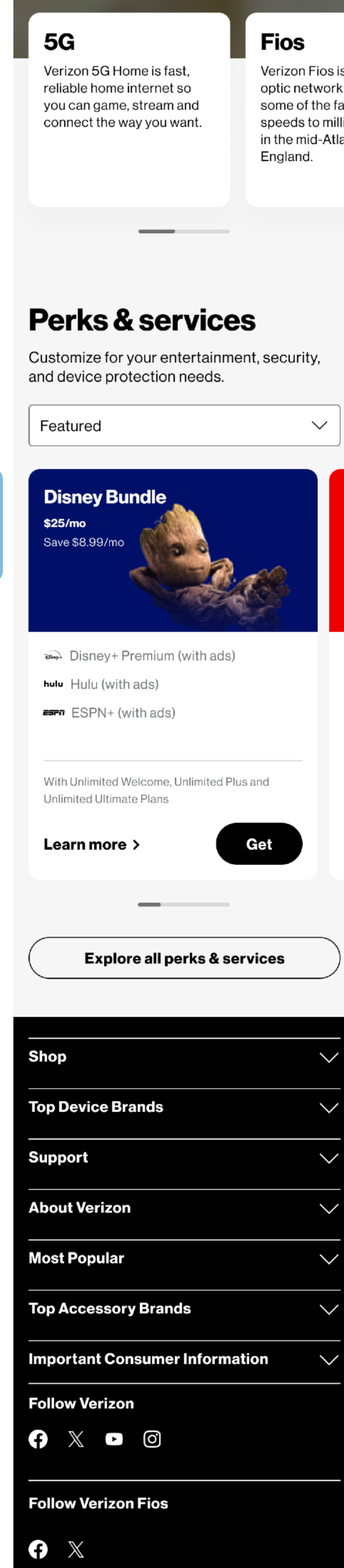
Reimagined plan tiles leveraging rapid path to purchase and learn opportunity

Elevated quick actions for switching prospects

Elevated home internet product availability directly on homepage



Reimagined perk tiles balance discoverability with cost saving opportunities



Verizon NextGen Digital

ROI

- 6+% target for increased conversion on prospect customers
- Flatten Learn/Buy layers, simplify checkout
- Increased average order value
- Improved customer segmentation & personalization
- Reduced acquisition costs
- Operational efficiency, improved self-service
- Cross-selling and up-selling success

Rewards & Benefits Hub

Mobile Experience

Experience Strategy

Discovery

Concept Design

Detail Design

Rewards & Benefits Hub

Integrated hub experience unifying rewards & benefits experiences across lines of business, including the launch of Chase Travel & Chase Dining into the suite of loyalty product experiences.

Organization

Chase

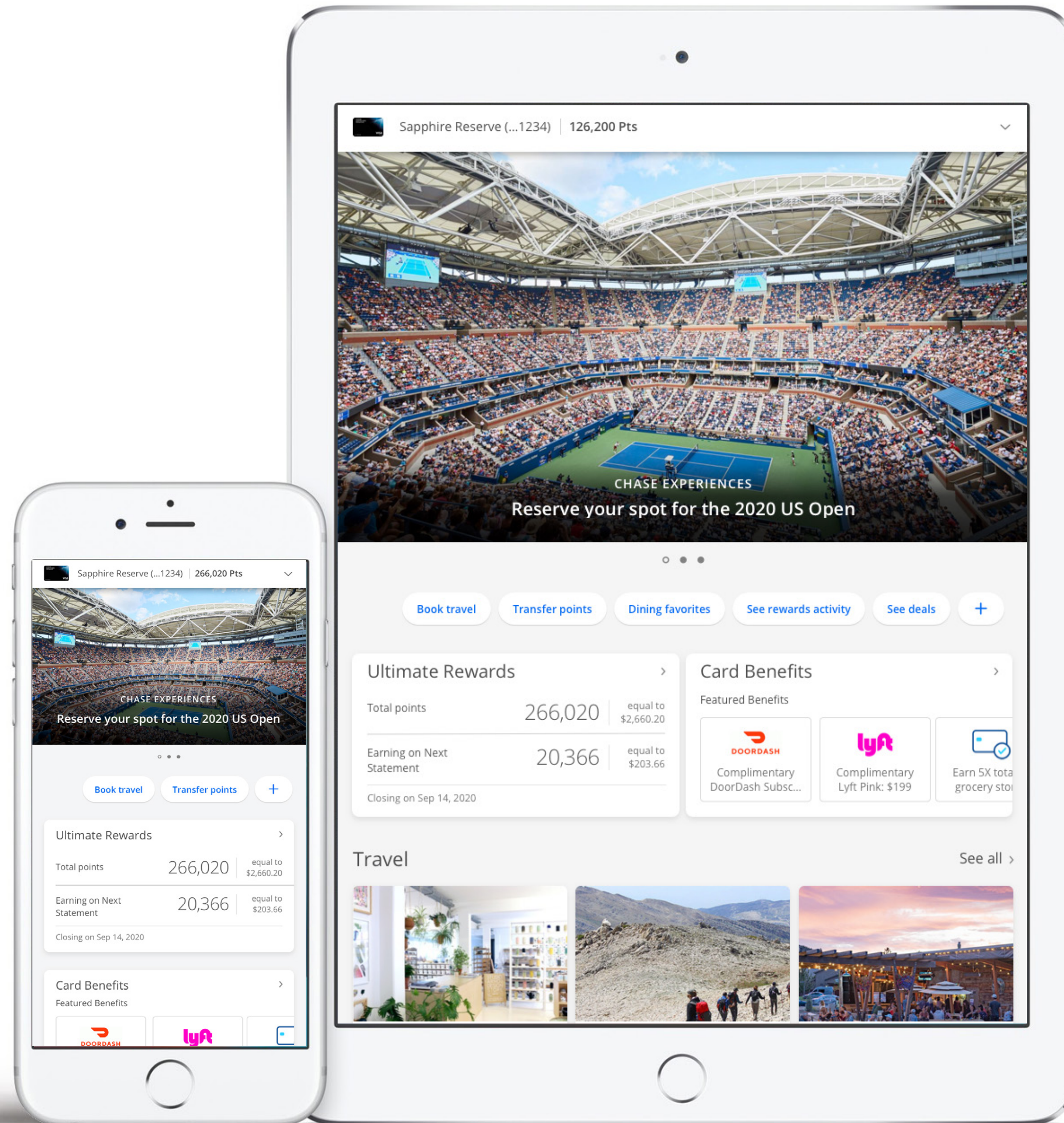
Role

UX Design Lead,
Design Innovation team

Team

3 designers, 1 content,
1 research

Rewards & Benefits Hub



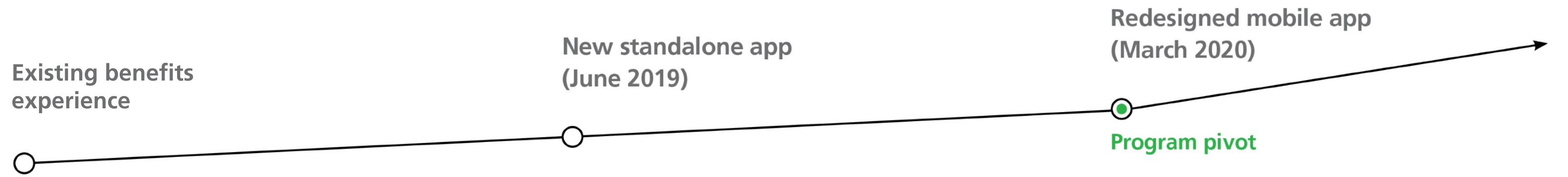
Key Business Objectives

- Ease pain points of most engaged customers
- Expand self-servicing for customers
- Deepen engagement across rewards products
- Diversify point redemption
- Contextual reinforcement of product benefits
- Prepare for market re-entry (travel & dining)

Key Experience Objectives

- Bring alignment of rewards experience in mobile/tablet
- Simplify mental models for content engagement
- Personalize content to be meaningful and relevant
- Create a delightful experience customers will value

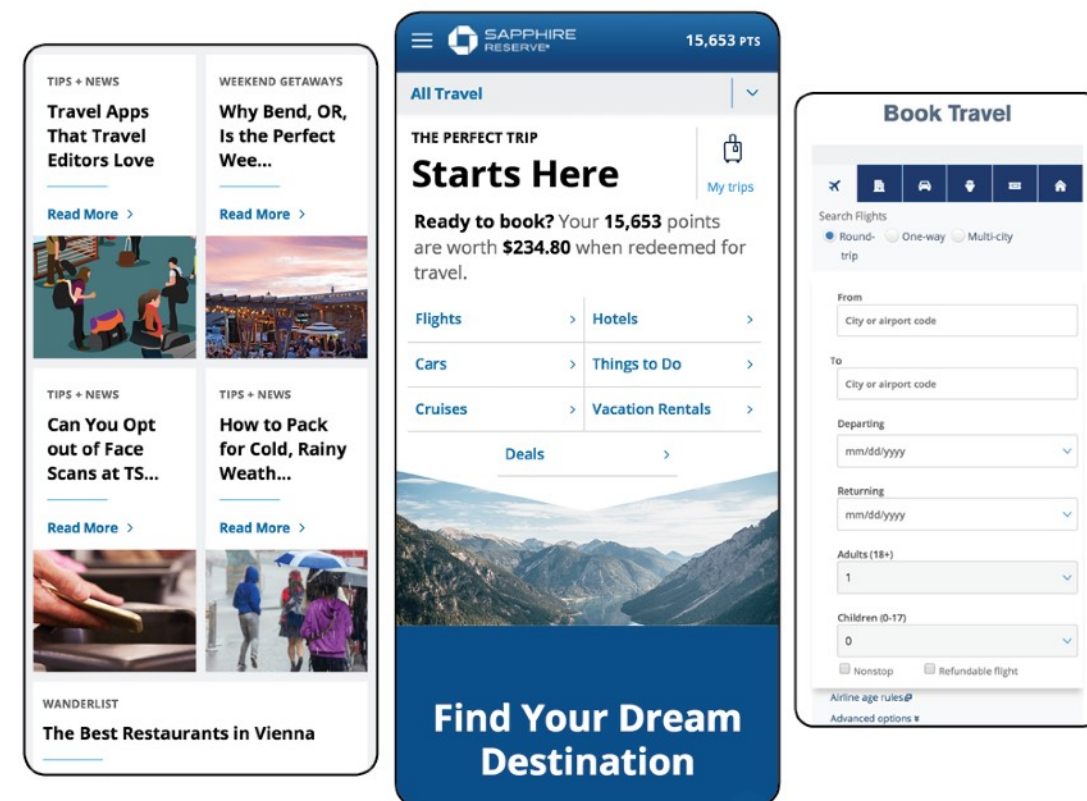
Product iterations



Existing benefits experience

Mobile Banking app

Hybrid framed-in web benefits experience

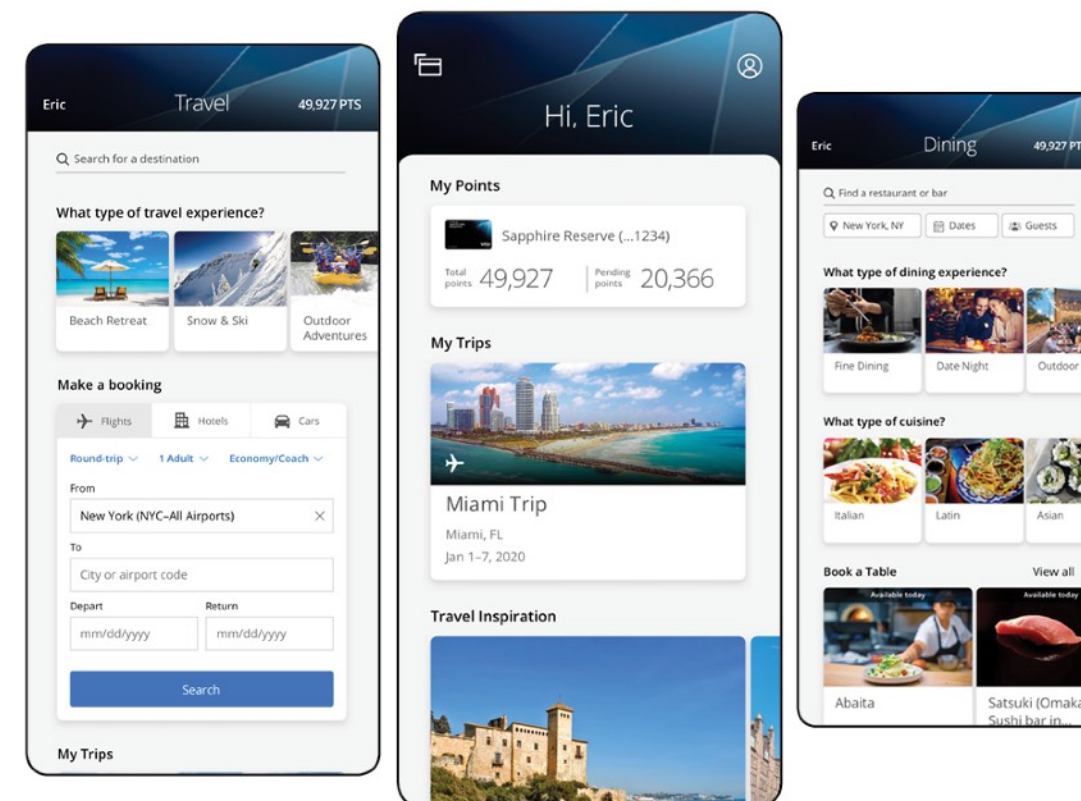


- not a native experience, finding content and booking hard on device
- Transactional focused experience
- no personalization
- complex information architecture

New standalone app (June 2019)

Benefits app

Native travel, dining, rewards app to test & learn with customer segments for Q4/20



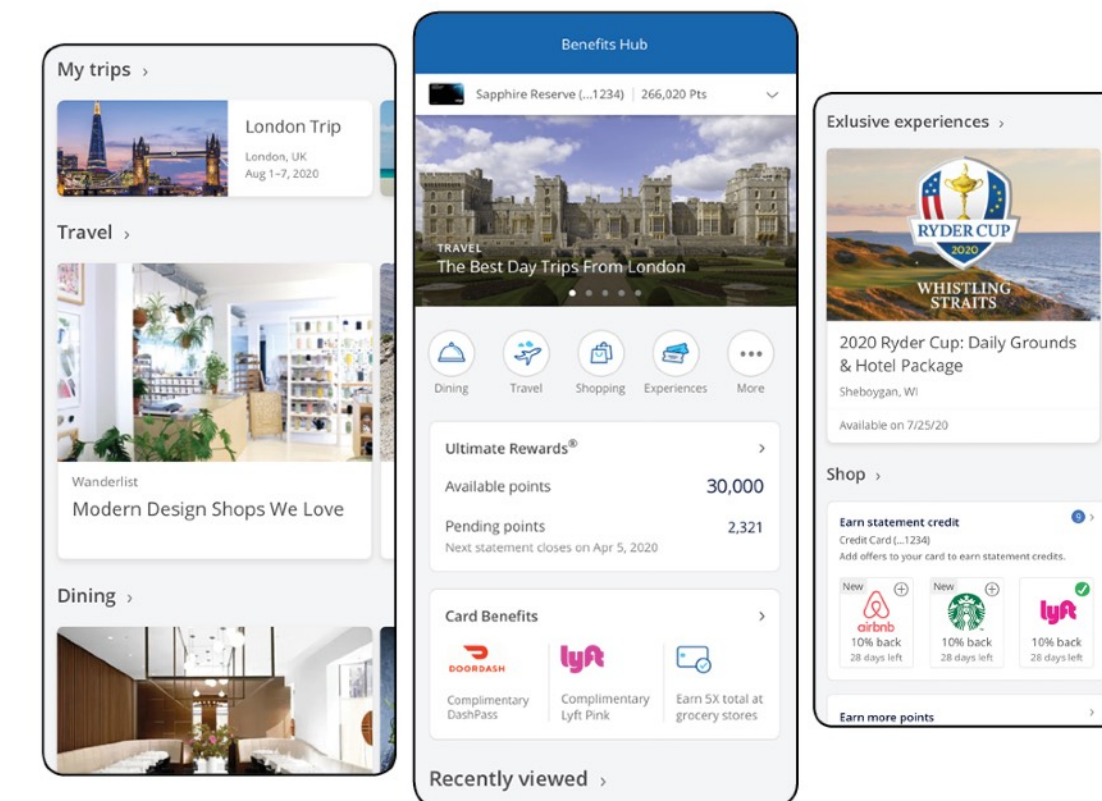
- intended to be used as a testing app, bank had to support another app
- didn't have integration with other core banking app functionality
- limited product shelf life

Redesigned mobile app (March 2020)

Program pivot

Mobile Banking app

Pivoted to integrate native features into dedicated Benefits hub and Travel for Q1/21



- due to Covid19, the team pivoted the integrate our work into a new Benefits experience within the mobile redesign
- redesigned experiences within new product architecture and redefined scope

Travel - Itinerary ideation



Tokyo, Japan

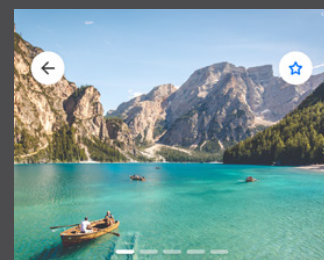
Book for 100k Experiences 8 Dining 4

You have enough points! 100k/100k

Book now

Experiences

Plan for your trip and add a reminder for places you will like to visit.

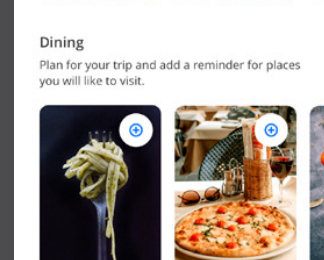
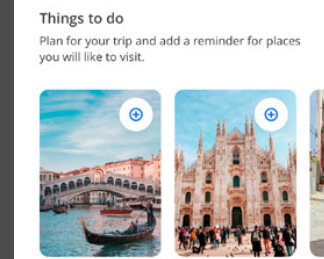


Pragser Wildsee, Italy

Book for 60k Things to do 12 Dining 4

You have enough points! 80k/60k

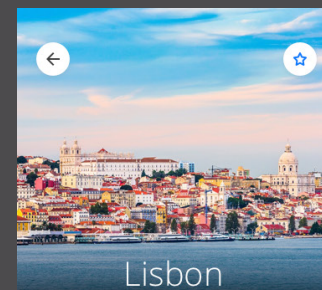
Book now



Points calculator

Simulate your points to see how you can maximize your rewards.

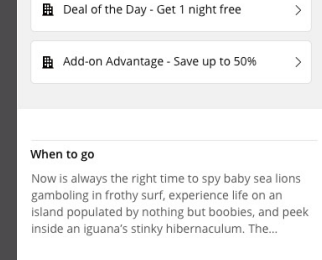
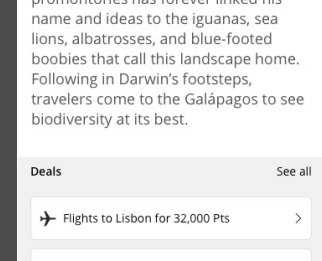
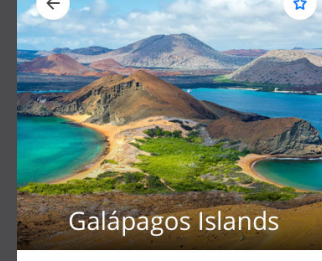
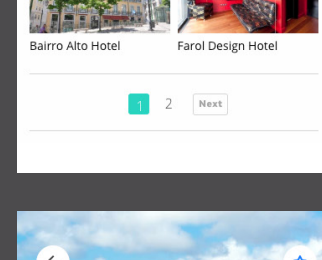
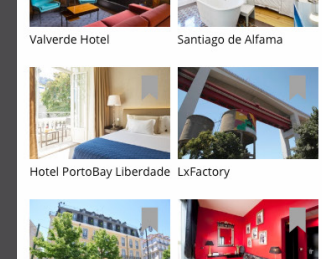
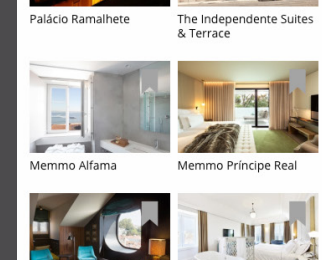
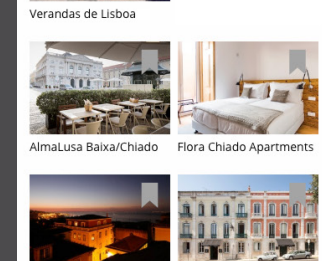
80,000 Current points 92,400 Simulated points



Lisbon

Deals Things to do Dining Accommodations

Showing 1 to 14 of 13 results



Your upcoming trip

Make your next trip your best trip.

New York City Tokyo

See Itinerary

Hot Deals

All the deals. All in one place. Only available for a limited time.

4x Bonus points

10% Bonus points

Lisbon, Portugal

Fri, Aug 23 - Sun, Sep 8

80,633 Pts Used

Lisbon Trip

ITINERARY EXPLORE & ADD

JFK LIS

11:00pm - 10:55am

Saturday, Aug 24

Flights to Lisbon for 32,000 Pts

Monday, Sep 1

12:00pm

Flight Only Deals

6:30 PM - 11:35 AM \$802

6:29 PM - 9:30 AM \$825

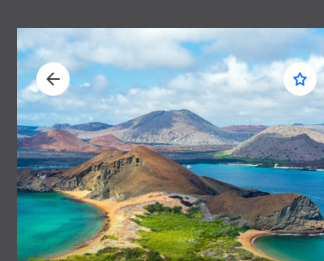
7:35 PM - 10:35 AM \$855

8:30 PM - 8:20 AM \$1,020

Flight + Hotel Deals

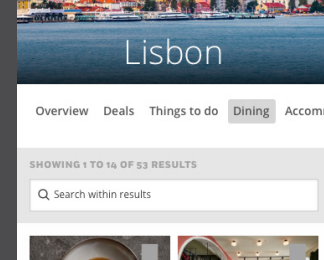
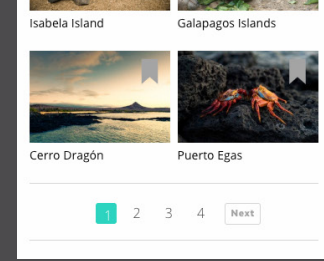
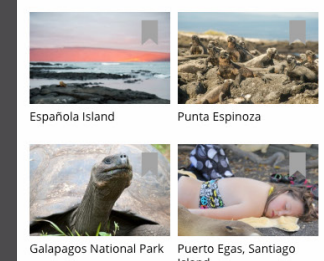
Altis Grand Hotel \$18,500 Pts

Corinthia Hotel Lisbon \$120,900 Pts



Galapagos Islands

Overview Deals Things to do Dining Accommodations



Lisbon Trip

Sat, Sep 28 - Sun, Oct 6

80,633 Pts Used

Saturday, Sep 28

JFK LIS

Monday, Sep 30

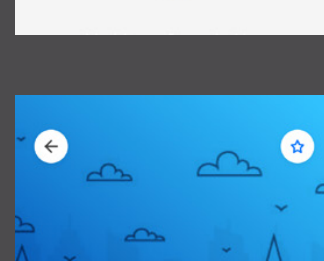
12:00pm

Thursday, Oct 3

6:00pm

Sunday, Oct 6

11:45am - 2:49pm



Portland Deals

Aug 12, 2019 - Aug 14, 2019

Flight Deals

9:45 AM - 11:05 AM \$135

9:35 PM - 10:50 AM \$147

Flight + Hotel Deals

Lisbon Marriott Hotel \$675

Lisbon Marriott Hotel \$985

Portland Regency Hotel

\$525

Lisbon

Overview Deals Flights Hotels Things to do Dining Accommodations

Why you should visit Lisbon now

Lisbon has a charming culture and friendly people. The best way to get to know the picturesque City of Seven Hills is to stroll up and down its winding streets, following your feet and slipping through the narrow alleys of such historic neighborhoods as Alfama. Follow...

When to go

Barcelos is a great place to visit year-round. When to go really depends on the experiences you want to have. Want to soak up the sun on area beaches? May through August is your...

Getting around

The Lisbon Portela Airport is the main international gateway into Portugal. TAP is the national Portuguese airline, though several low-cost airlines (including EasyJet and...

Food and drink

Portuguese cuisine is diverse and delicious. Try a hearty winter dish like cozido à Portuguesa (meat, potatoes, white beans, and often soured in summer, nothing beats the grilled fish and...

Culture

Lisbon is filled with centuries-old churches, palaces, and mansions. Museums dot the city - don't miss Museu Nacional do Azulejo, Museu Calouste Gulbenkian, or the new...

What the locals know

After a night out, hungry revelers go to Fábrica de Pastelaria Azevedo e Vidal at Avenida Almirante Reis, 149, or to Panificadora São Roque on Rua da Rosa, near Bairro Alto. It...

Lisbon Deals

From Home (NYC) to Lisbon (LIS)

Aug 30, 2019 - Sep 8, 2019

Flight Deals

6:30 PM - 11:35 AM \$602

7:35 PM - 10:35 AM \$678

Flight + Hotel Deals

Lisbon Marriott Hotel \$1,200

My Charm Lisbon Suites \$985

Lisbon

Overview Deals Things to do Dining Accommodations

Miami Trip

Miami, Florida Jan 1-7, 2019

Time zone: GMT+1 | Currency: € Euro

Hotels

Nobu Hotel Miami Beach

The Mayfair at Coconut Grove

Dining

HIDEN

Flora: West African

Things to do

Little Havana Food Tour

Helicopter Tour

Lisbon Trip

Sat, Sep 28 - Sun, Oct 6

80,633 Pts Used

Accommodations

Lisboa Pessoa Hotel

Lisbon Marriott Hotel

Dining

Pastéis de Belém

Time Out Market Lisbon

Things to do

Lisbon Walking Tour

Douro Valley Wine Tour

Lisbon

Overview Deals Things to do Dining Accommodations

Flight Only Deals

6:30 PM - 11:35 AM \$802

6:29 PM - 9:30 AM \$825

7:35 PM - 10:35 AM \$855

8:30 PM - 8:20 AM \$1,020

Lisbon

Overview Deals Things to do Dining Accommodations

Lisbon Trip

AUG 23 - AUG 31, 2019

Time zone: GMT+1 | Currency: € Euro

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Back

9 Days

Lisbon Trip

Miami Travel Guide

AFAR Guide Edited by Gilana Wynn

There are plenty of destinations with beautiful beaches, great cuisine, and world-class shopping, but Miami has all this plus a rich history of art and design and a unique fusion of cultures and...

Miami's Coolest Rooftop Restaurants & Bars

DINING

Local Weather

MON OCT 31 72°/64°

TUE NOV 1 72°/64°

WED NOV 2 70°/67°

THU NOV 3 74°/63°

Getting around

There are direct flights to Miami International Airport (MIA) from many airports, domestic and international. If you are driving, the city's a strategic shot down I-95, the major expressway that runs...

Food and drink

Miami is a culinary wonderland, with options ranging from Michelin-starred restaurants to hole-in-the-wall eateries in Little Havana. To avoid the expensive pricing at some of the city's trendy...

What the locals know

Miami is undergoing a renaissance. The city really emerged in the 1990s when South Beach became known for its youthful vibe and cool hotel scene. An influx of creatives has reshaped the art world...

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Miami Trip

Miami, Florida Jan 1-7, 2019

Time: 12:34 PM ET (no time difference to NY)

Travel Confirmation

Your Itinerary #743961550539 is confirmed. Your booking ID is RQAFAG.

Travel Confirmation

Wed, Jan 1

From LaGuardia (LGA) To Miami Int. (MIA)

7:20am - 10:31am

Travel Confirmation

Tue, Jan 7

From Miami Int. (MIA) To John F. Kennedy Intl. (JFK)

7:00am - 10:01am

Travel Confirmation

Upcoming Trip

Miami Itinerary

Travel Confirmation

Add to your Miami trip

Book a hotel

Make a reservation

Find local experiences

Schedule ground transportation

Travel Confirmation

Travel Confirmation

Travel Confirmation

Travel Confirmation

Travel Confirmation

Travel Confirmation

Travel Confirmation

Travel Confirmation

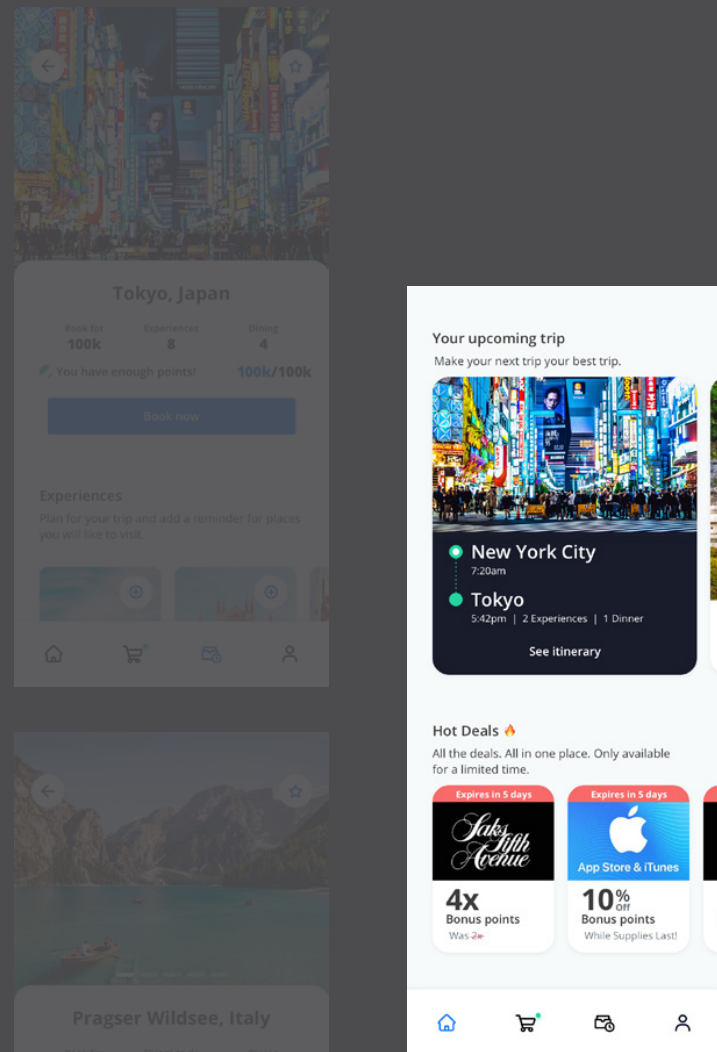
Travel Confirmation

Travel Confirmation

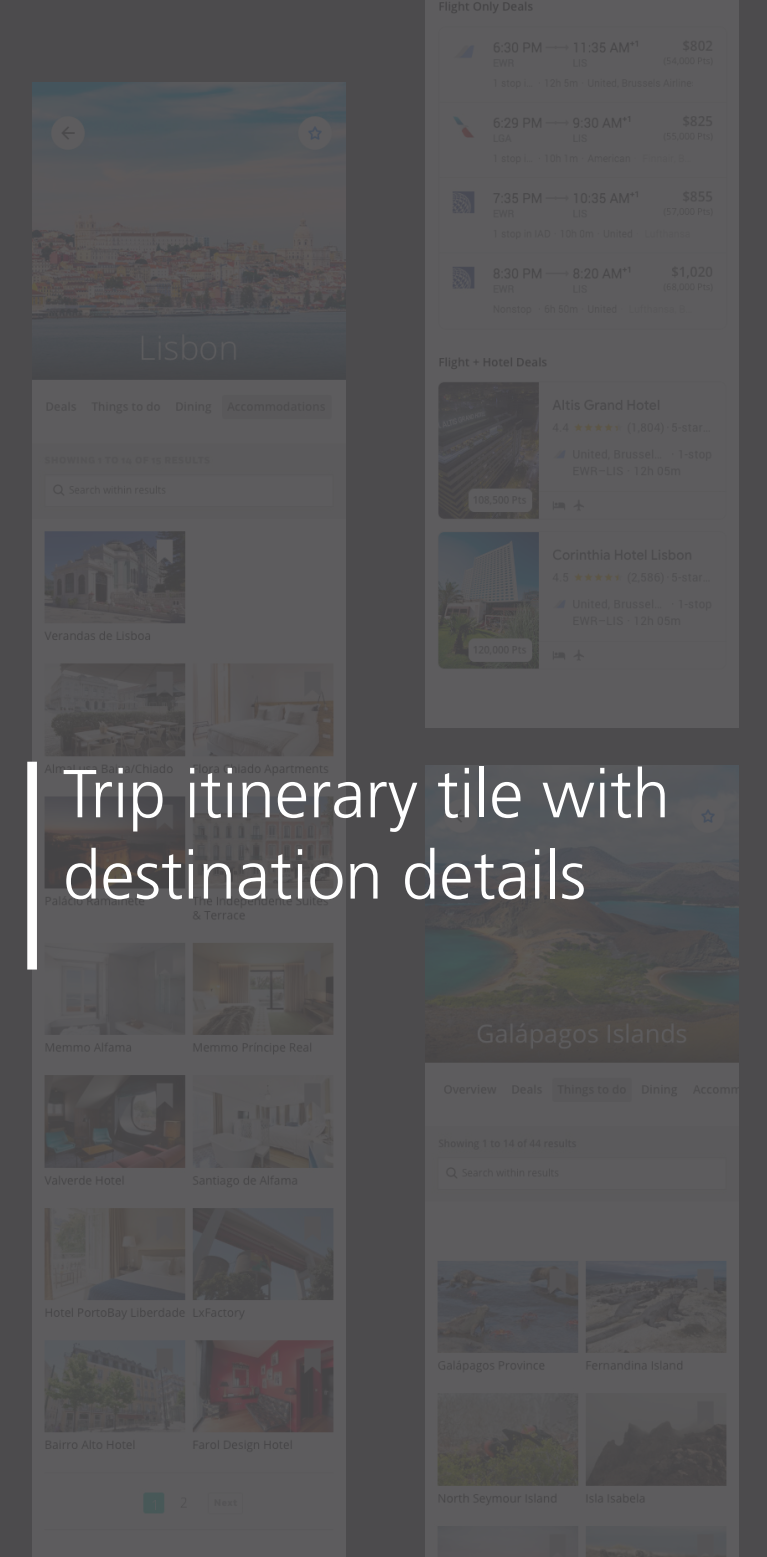
Travel Confirmation

Travel Confirmation

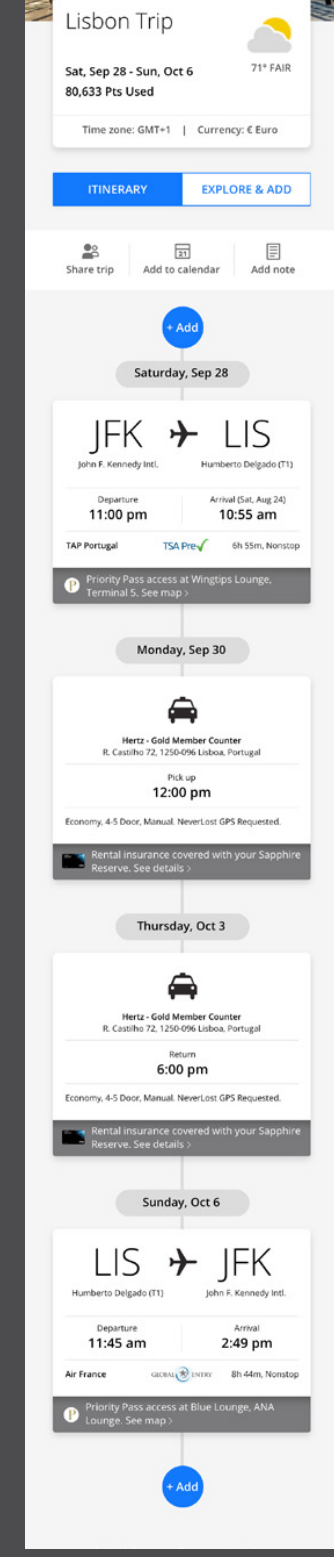
Travel - Itinerary ideation



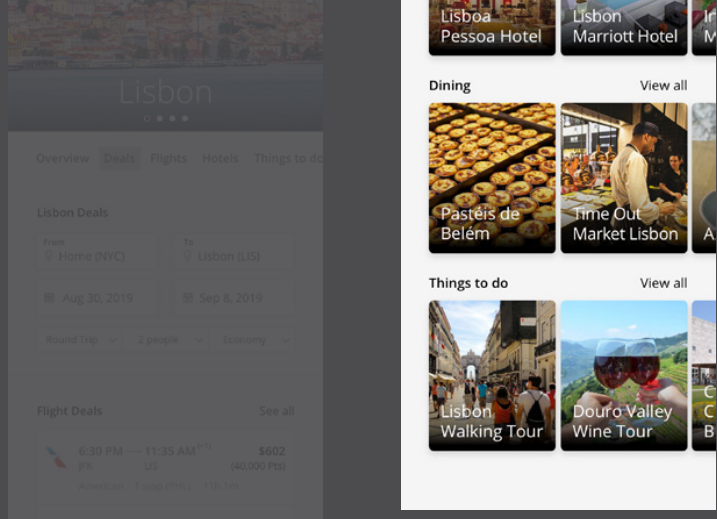
Combination of Destination Guide and location specific deals



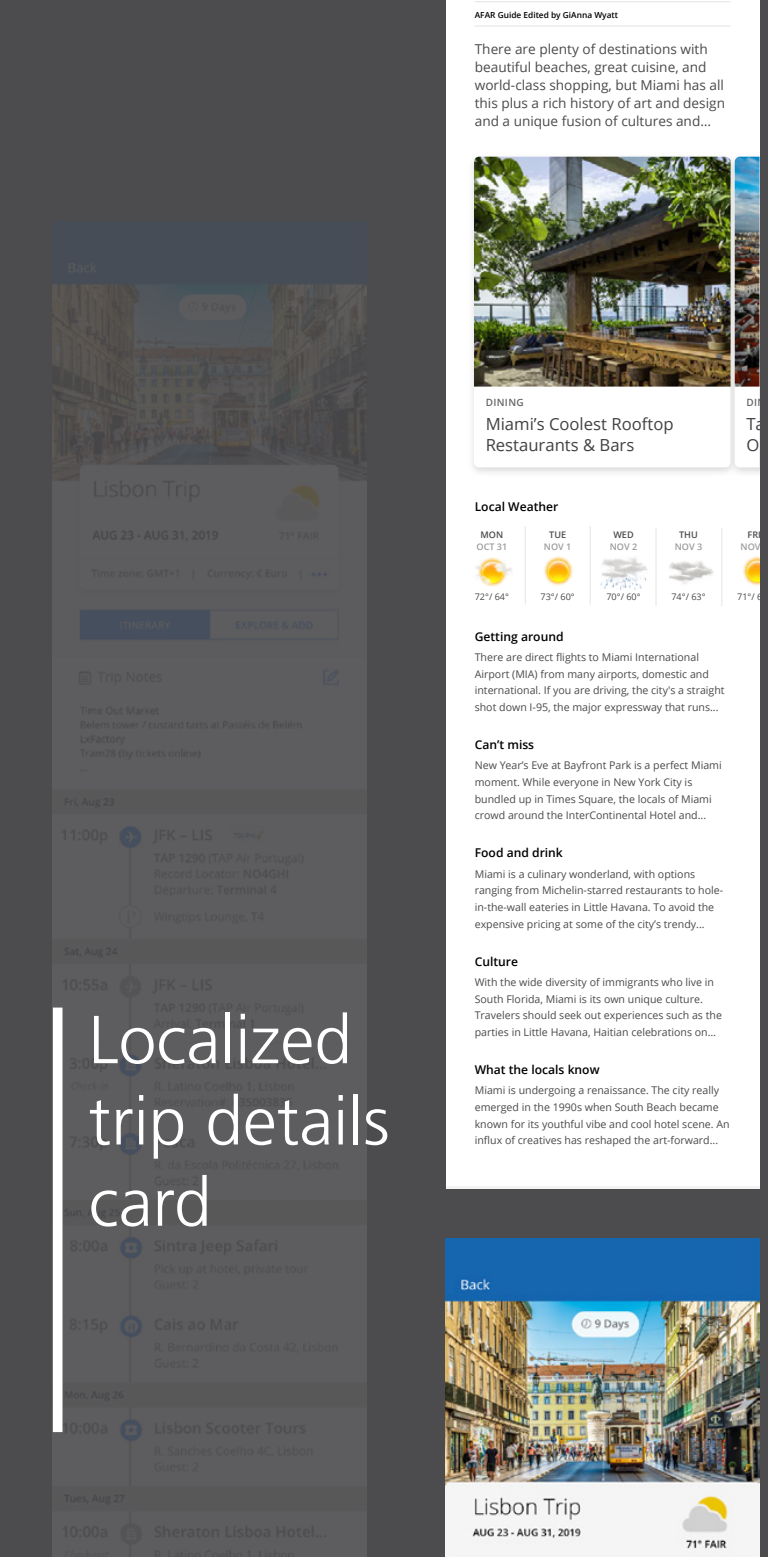
Trip itinerary tile with destination details



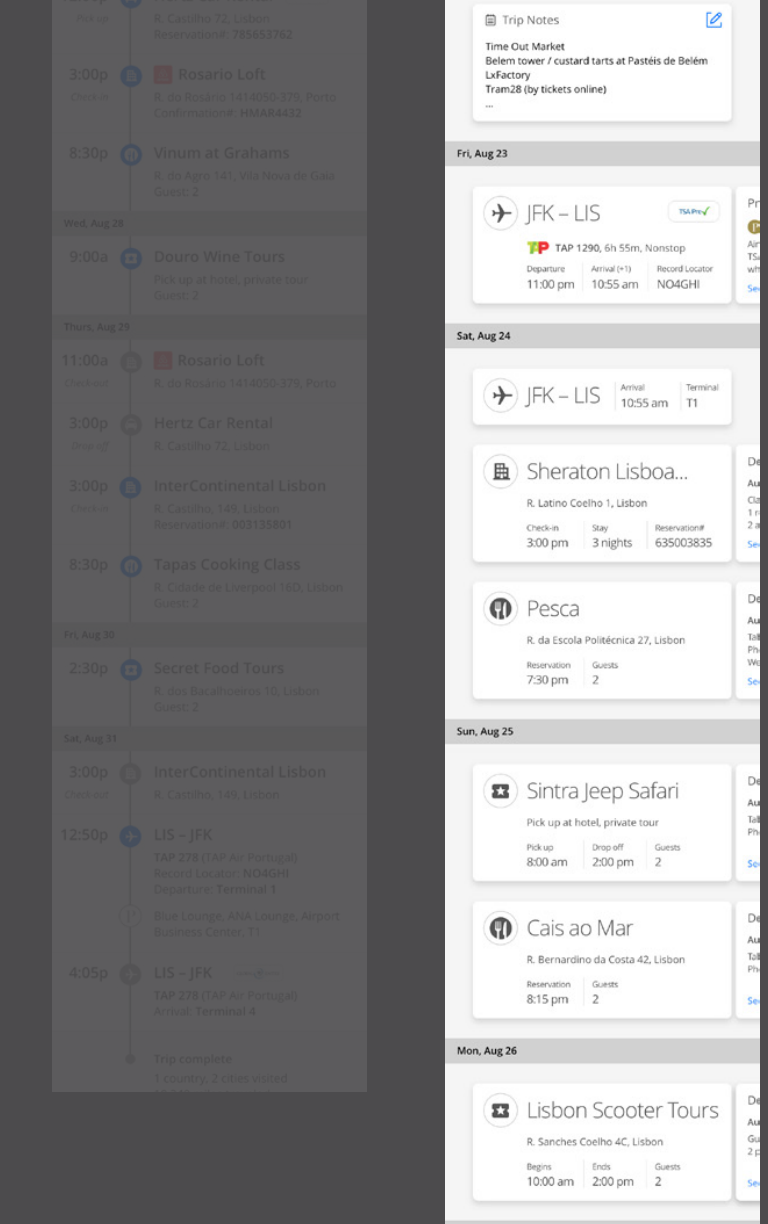
Chronological booking with contextual benefit reinforcement



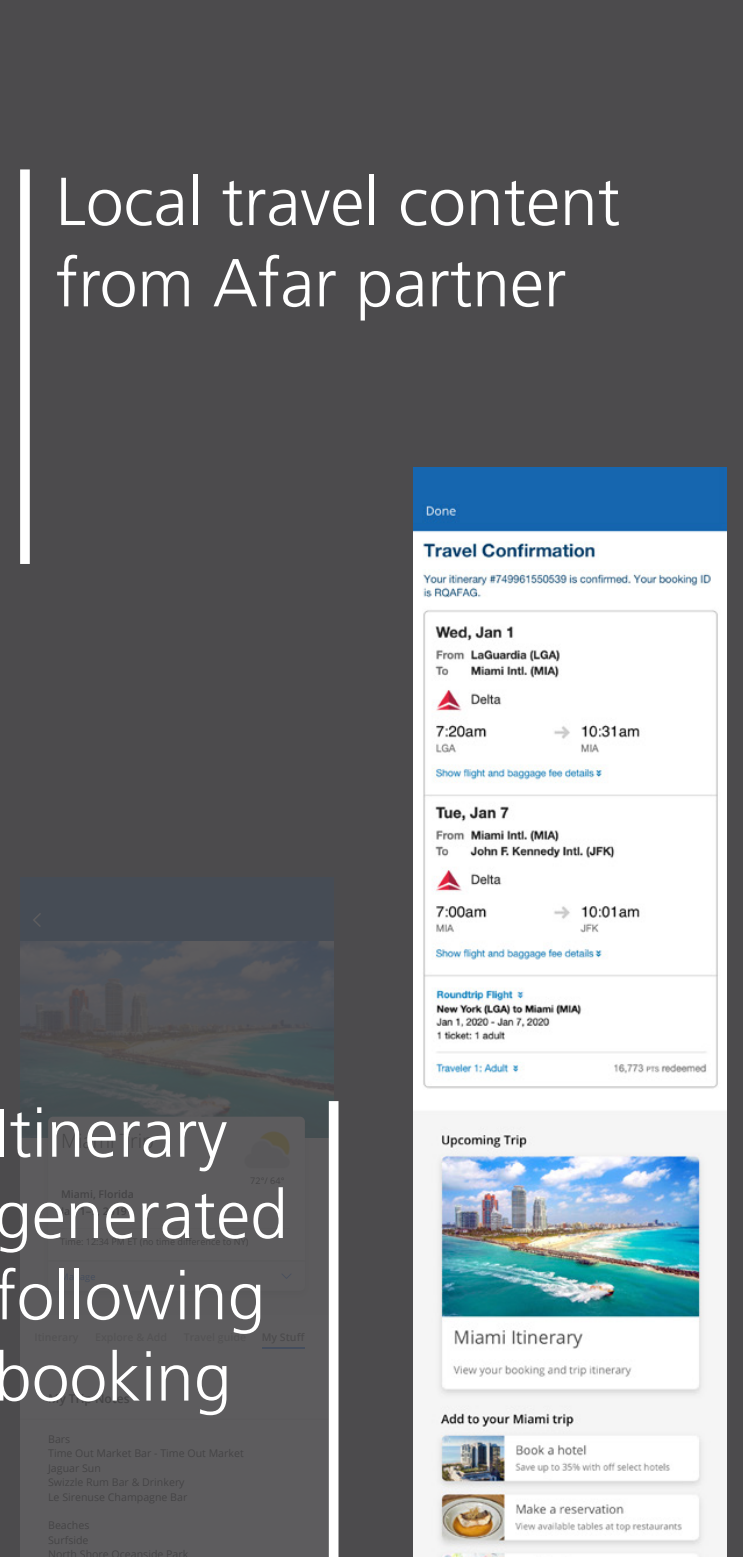
Default Destination Guide template



Localized trip details card

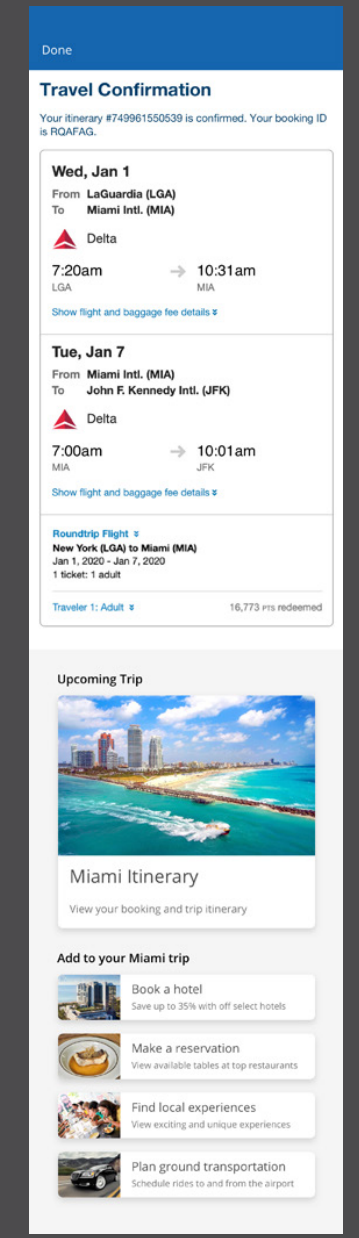


Card UI exploration for chronological bookings



Local travel content from Afar partner

Itinerary generated following booking



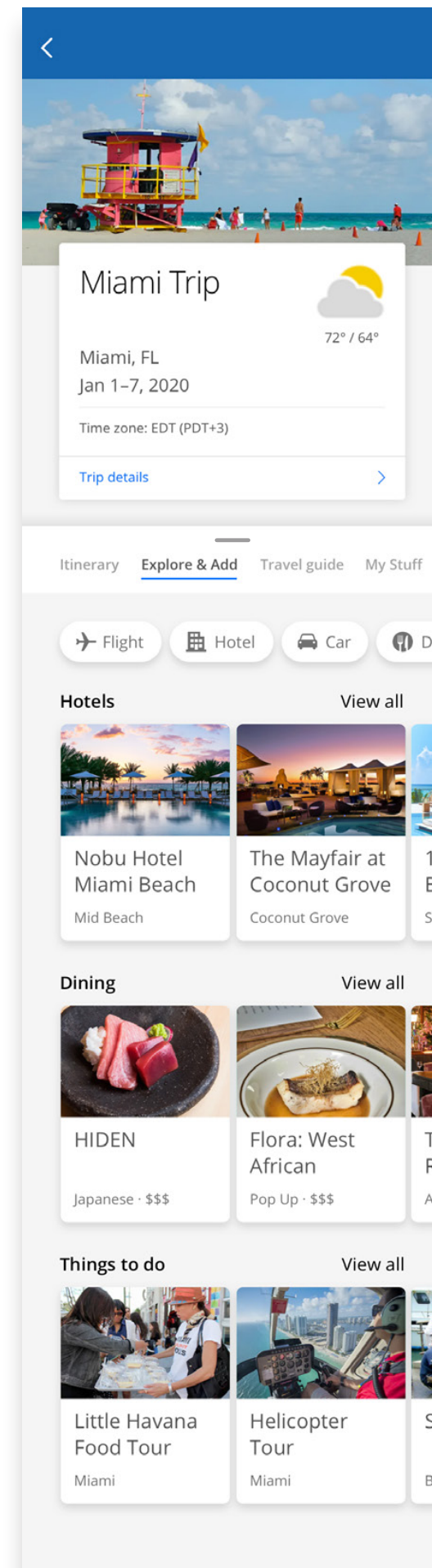
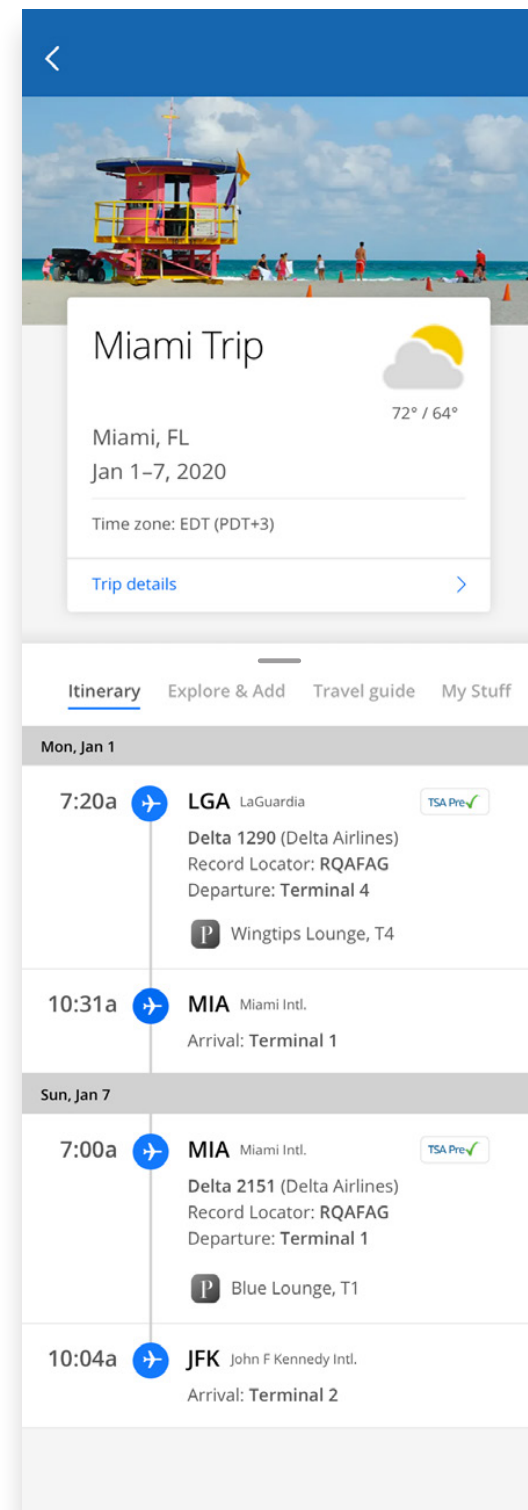
Travel Confirmation

Travel - Domestic itinerary

Localized details for trip destination

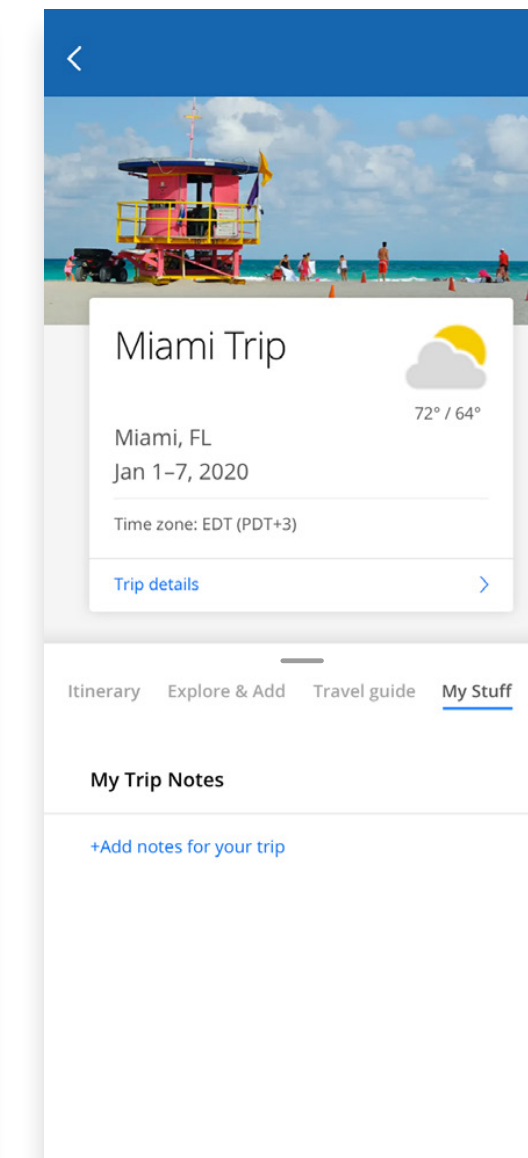
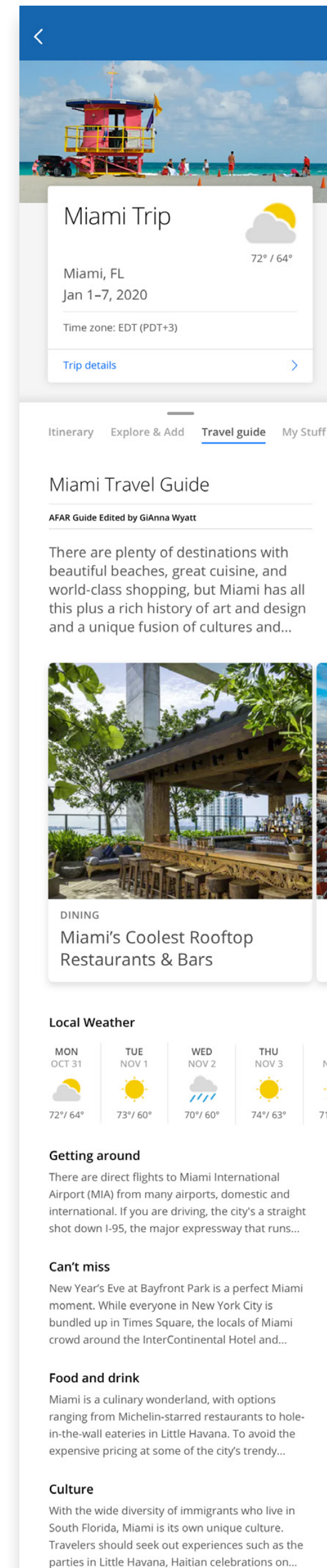
Primary Nav

Chronological view of bookings with contextual card benefits

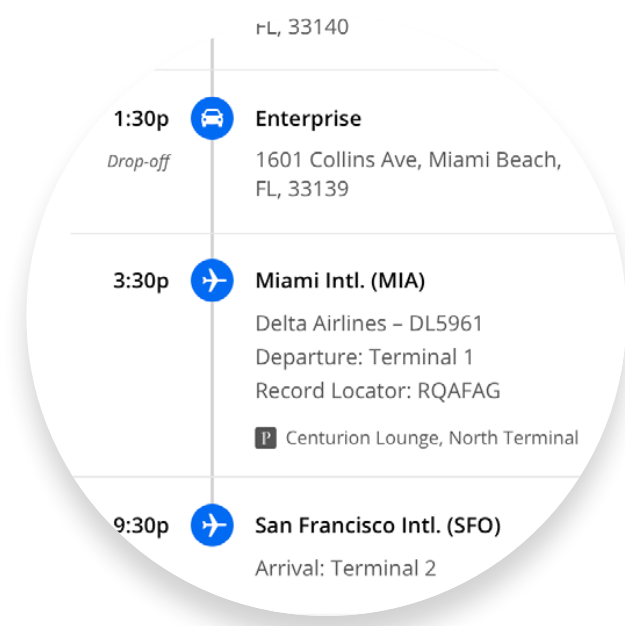


Quick add links and localized hotels, dining and things to do tiles

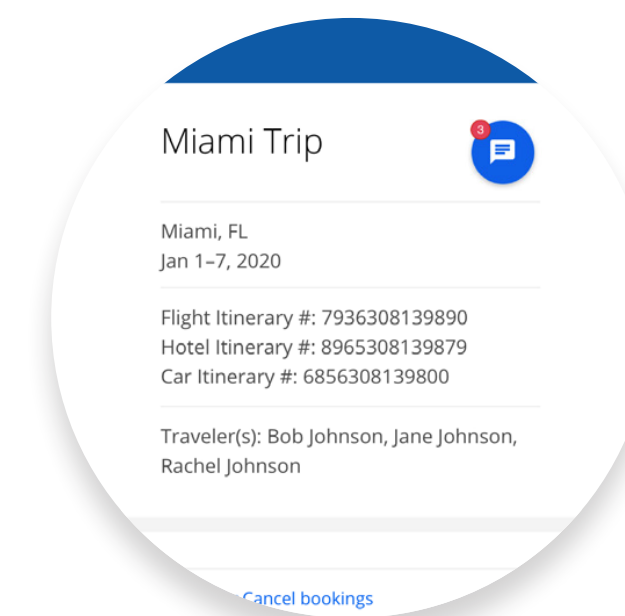
Travel guides accessible throughout the travel journey



Research insight informed desire to have free form text to save notes

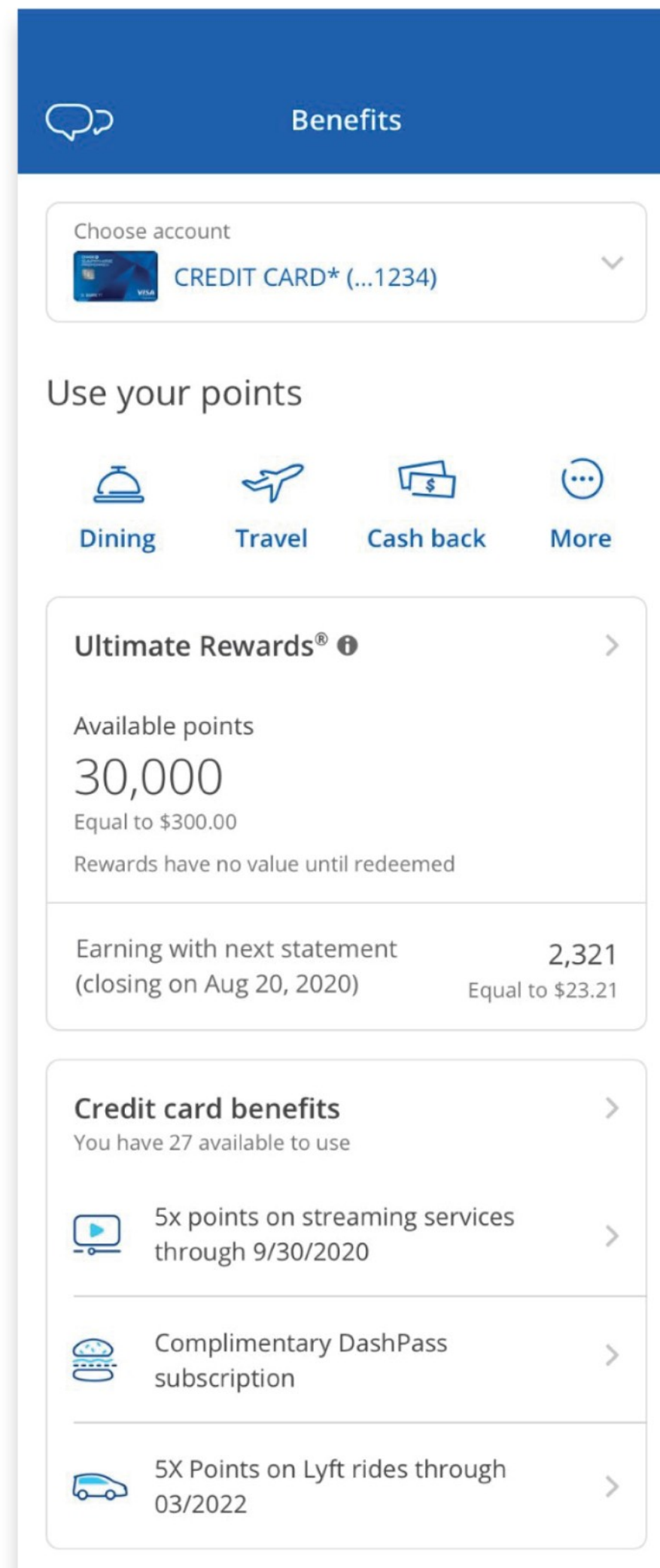


Contextual benefit reinforcement



Supporting self service through live chat

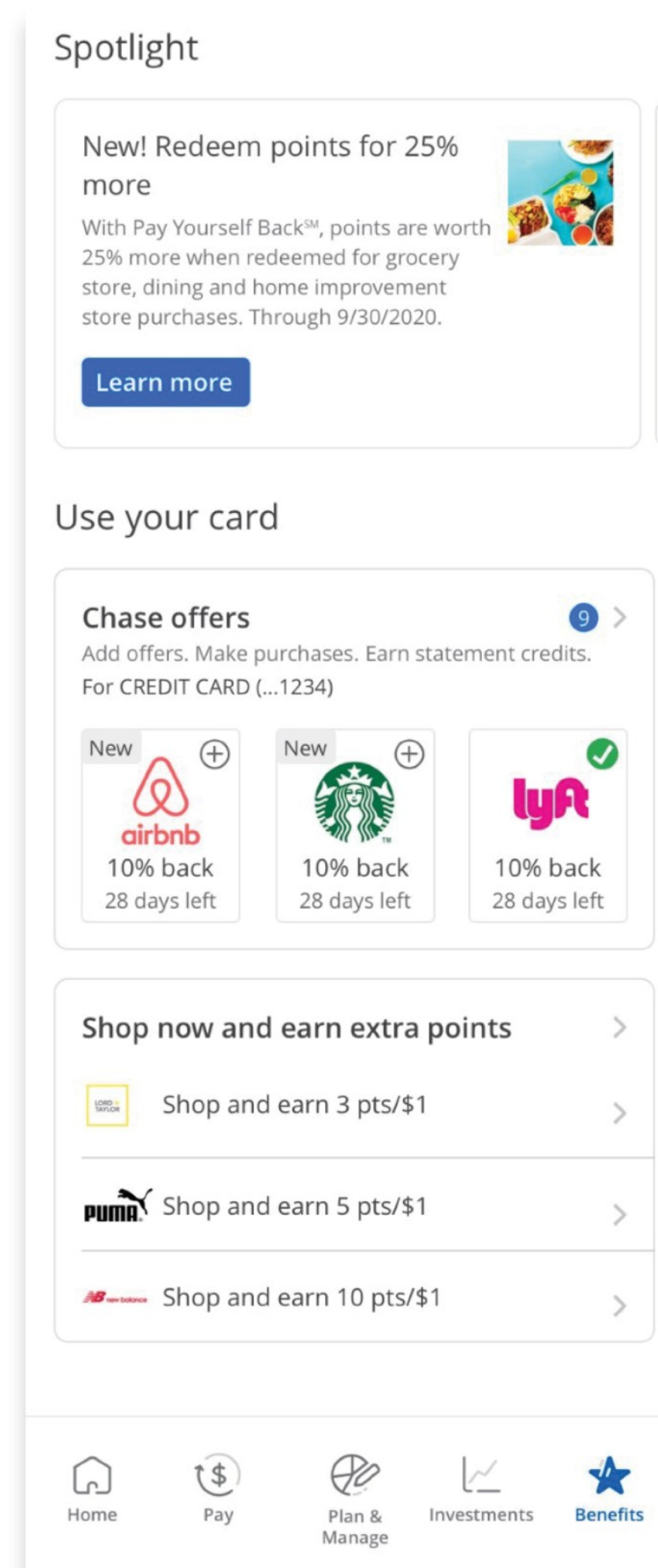
MVP for Q1/2021



Pain point: hard to access redemption options

Pain point: hard to find points to dollar value and pending points

Pain point: benefits aren't easy to find and changes aren't communicated effectively

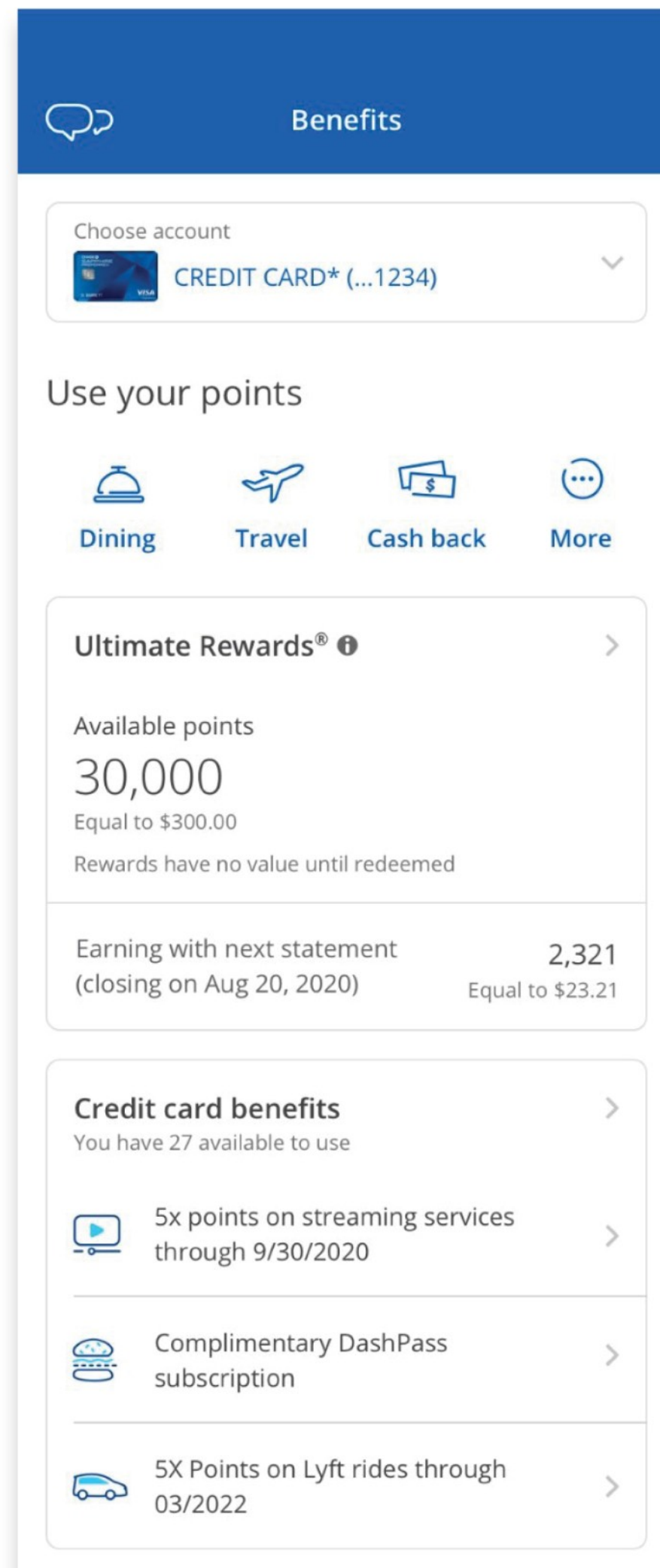


Pain point (business): Card/Reward teams don't have a way of promoting deals/offers in app

Pain point (business): Requirement to include Chase offers module

Pain point: confusion around value prop and low engagement

MVP for Q1/2021



Pain point: hard to access redemption options

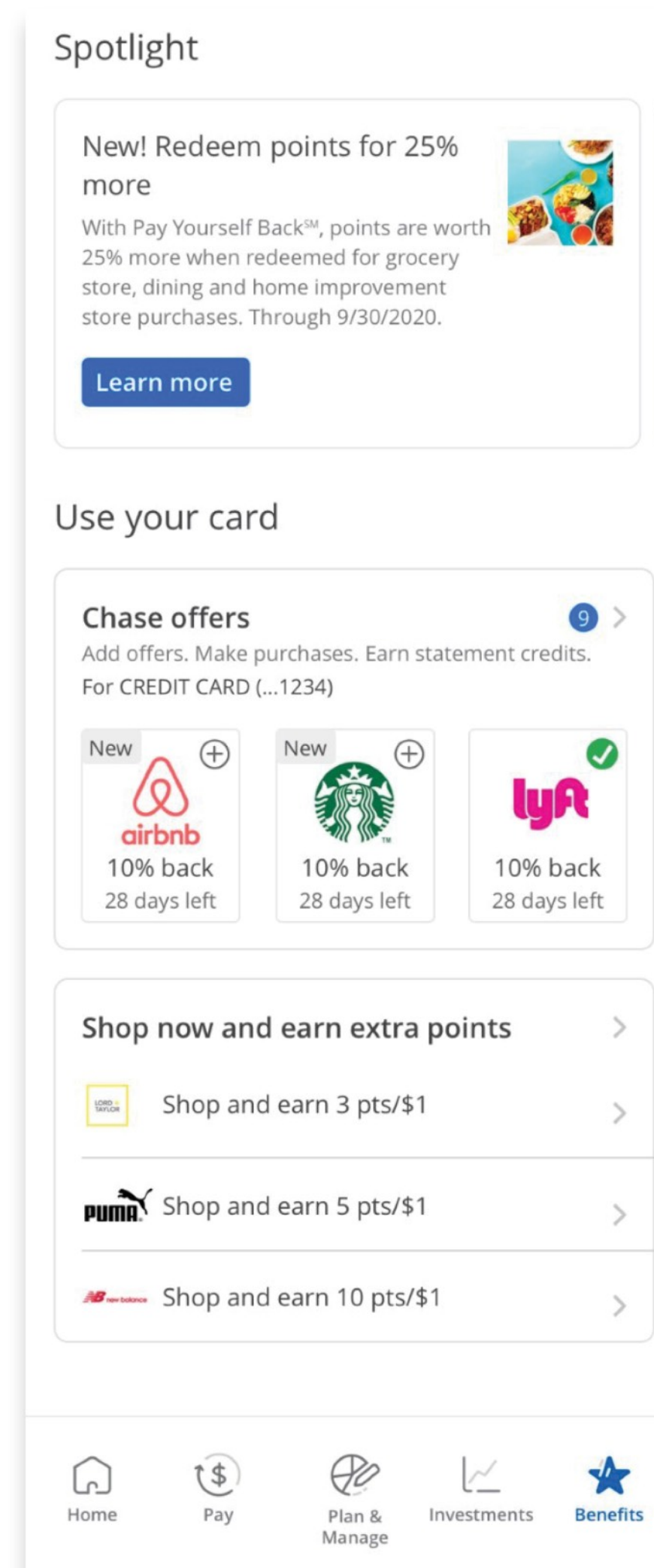
Solution: quick actions elevate card-specific redemption options

Pain point: hard to find points to dollar value and pending points

Solution: points tile incorporates point to dollar values for available and pending points

Pain point: benefits aren't easy to find and changes aren't communicated effectively

Solution: benefits tile elevates dynamic benefits that can reflect new or modified offers



Pain point (business): Card/Reward teams don't have a way of promoting deals/offers in app

Solution: Spotlight allows for internal promotions to be served based on customer/card profile through a personalization engine

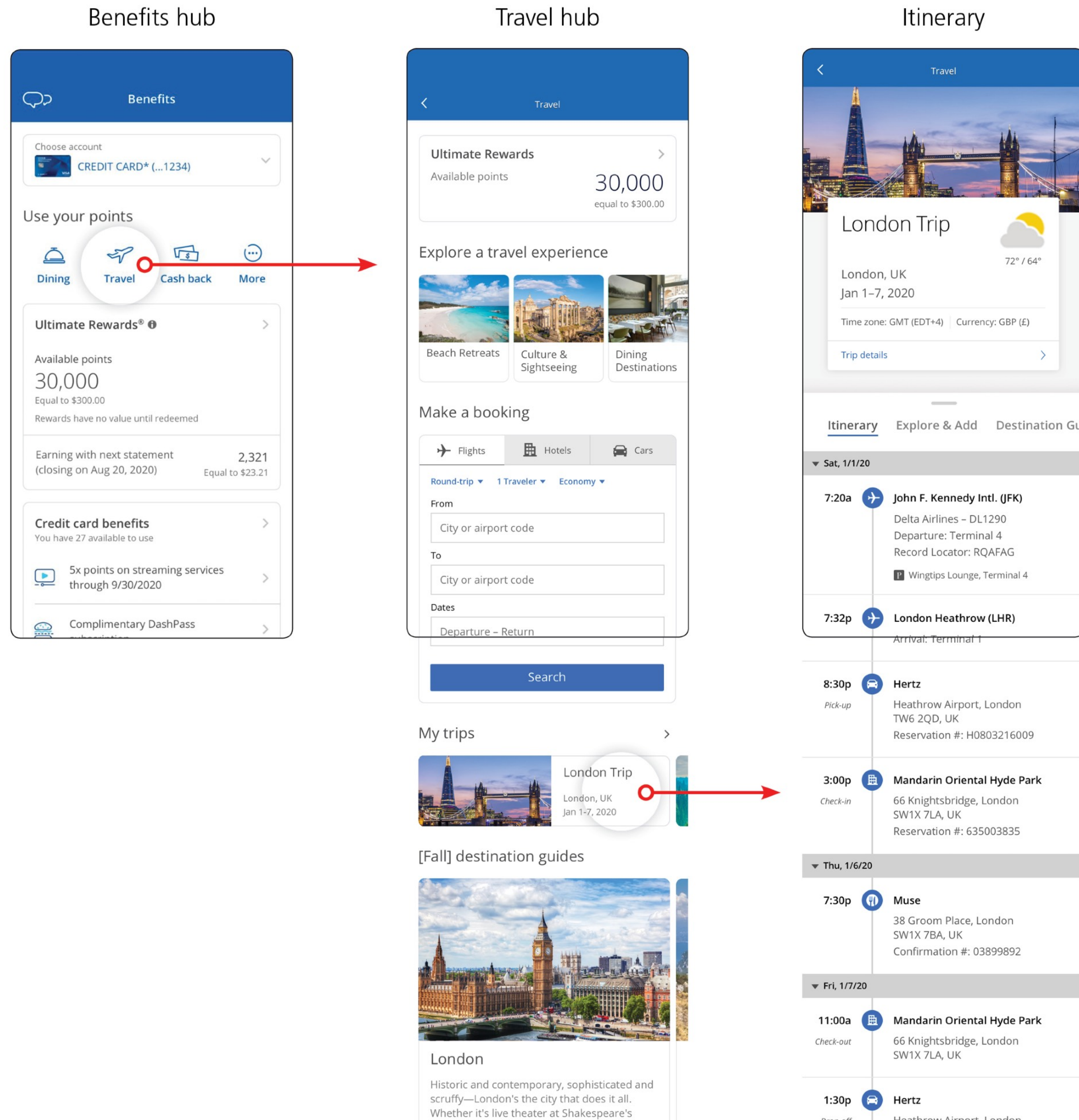
Pain point (business): Requirement to include Chase offers module

Solution: Proposed redesign of module, but current model generates revenue based on impressions

Pain point: confusion around value prop and low engagement

Solution: Shop tile surfaces relevant merchants based on transaction history, seasonal offers and top merchants

Product architecture



Travel Itinerary

Aggregated travel planning tool for Q1/21

- individual reservations organized by booking type and hard to manage
- current experience web-based and has a complex hybrid navigation on mobile device
- no chronological view for on trip experience
- bookings are transaction focused, limited ability to plan and build trips

Key insight: the team identified an opportunity to meet multiple business and customer needs with an integrated itinerary

Rewards & Benefits Hub

ROI

- Prepared for market entry post-pandemic (2021)
- Increased engagement for ~50+ million customers
- Increased customer retention & loyalty
- Increased revenue from partner offerings
- Cost reduction in customer support / drive self-service
- Improved customer satisfaction & net promoter score
- Upsell and cross-sell opportunities
- Brand differentiation & market positioning (Sapphire)
- Increased UR point spend (debt reduction for Chase)

Affluent Consumer Experience

Experience Vision

Experience Strategy

Discovery

Concept Design

Affluent Consumer Experience

Experience vision offering affluent millennial customers a concierge experience with personalized insights and plans to meet financial life goals. Features development ongoing.

Organization

US Bank (consumer)

Role

Experience director

Team

4 designers, 1 content,
2 strategy, 1 research

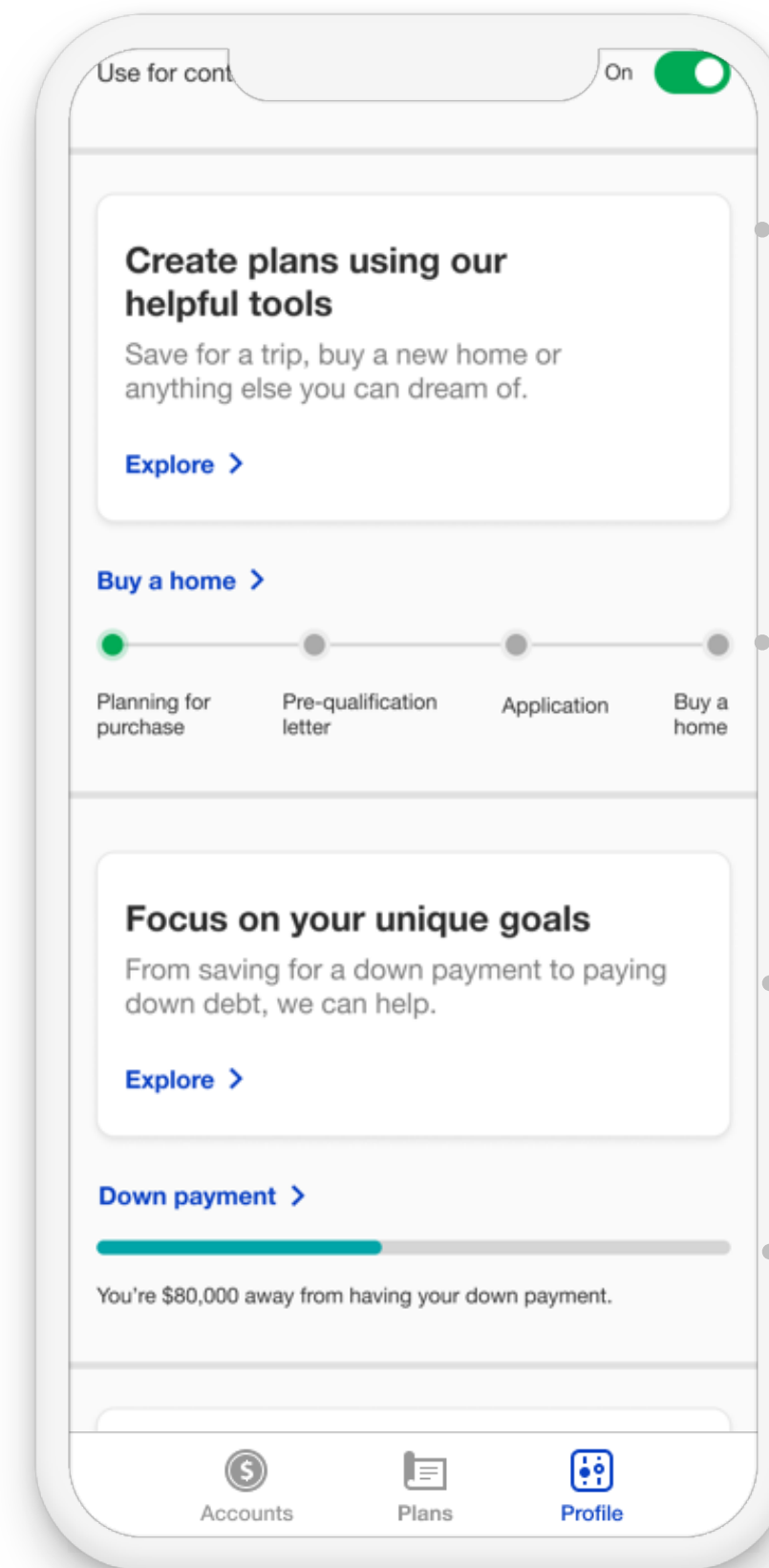
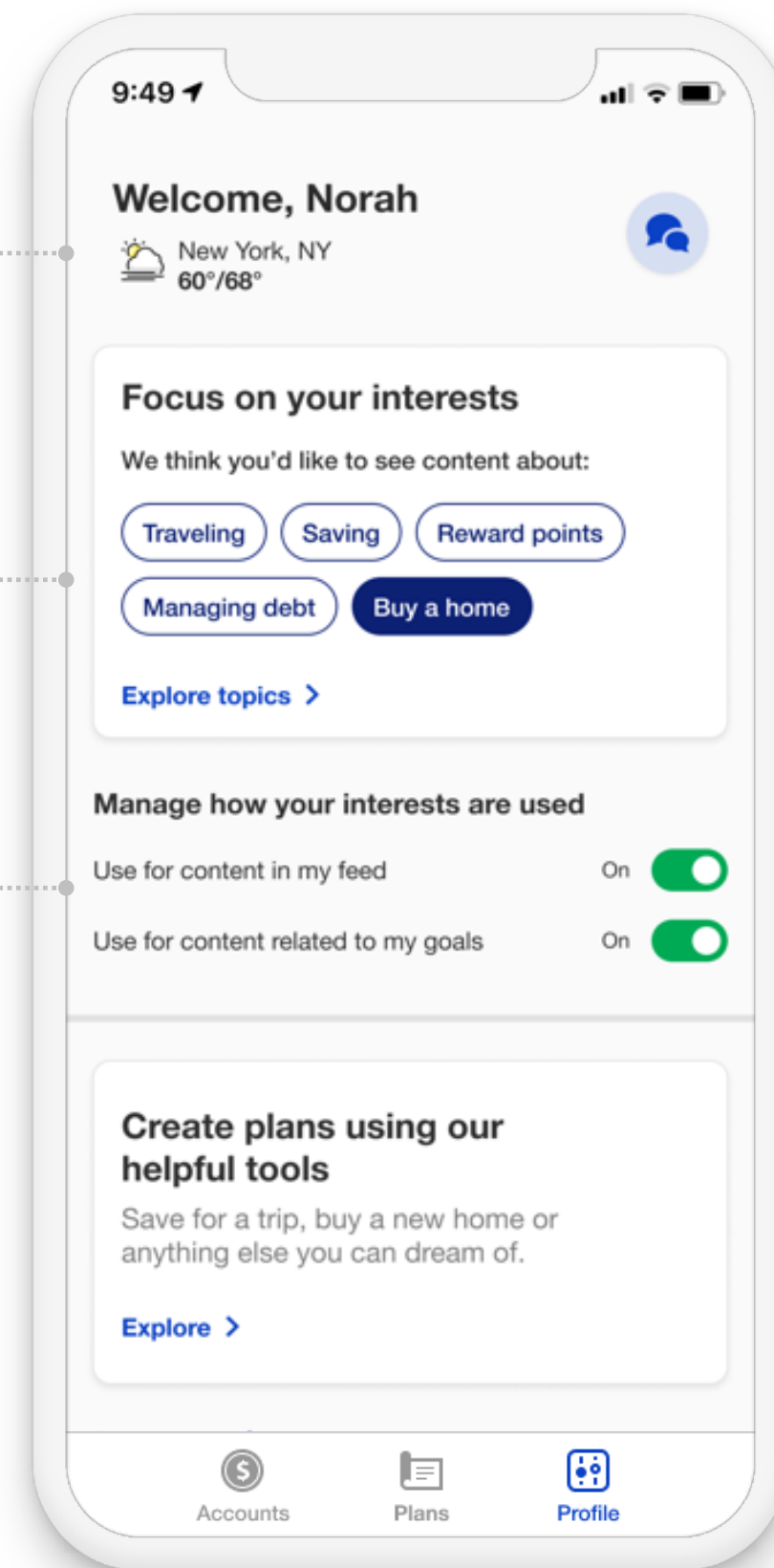
Our framework for understanding customer needs

Introducing our new customer profile

Welcome: See a personalized experience with geolocated weather

Interests: Review topics derived by activity and behaviors, managed by customer

Set preferences for how interests are used across the customer experience



Plan: Explore U.S. Bank plans to help achieve financial wellness and success

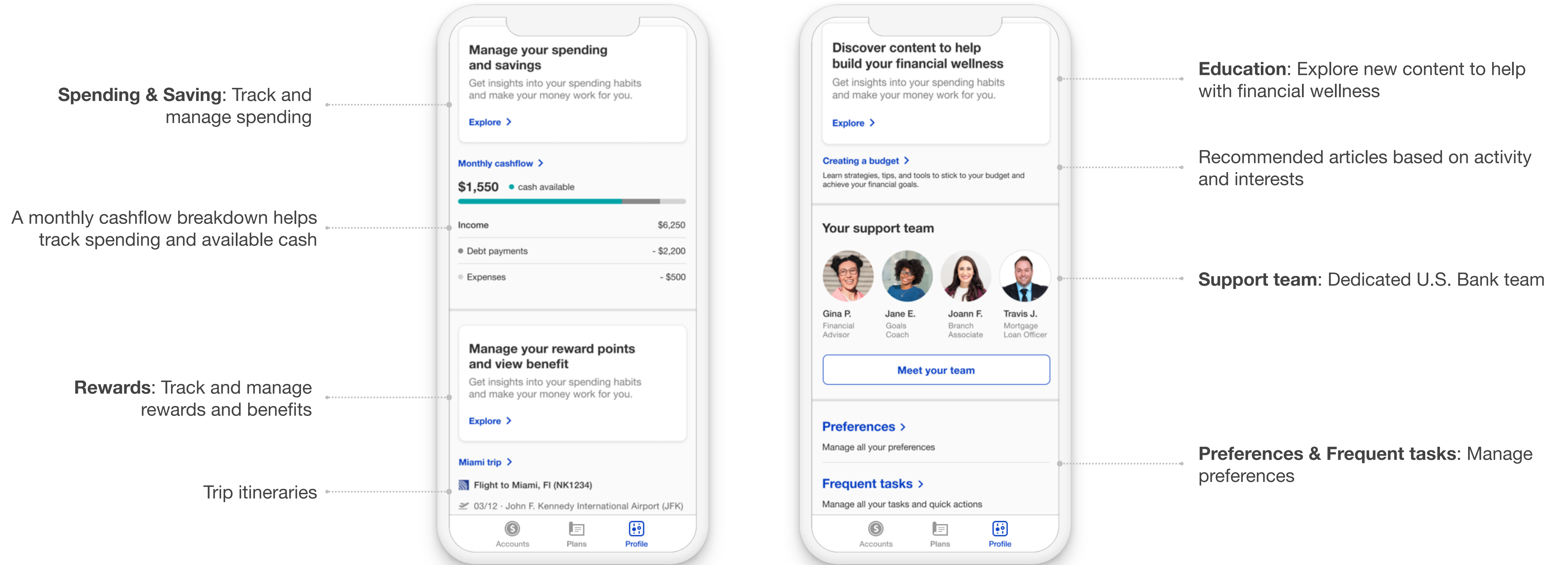
Active plans displayed to track progress

Goals: Define and manage financial goals

Active goals display to track progress

Our framework for understanding customer needs

Introducing our new customer profile



Can we be home buyers?

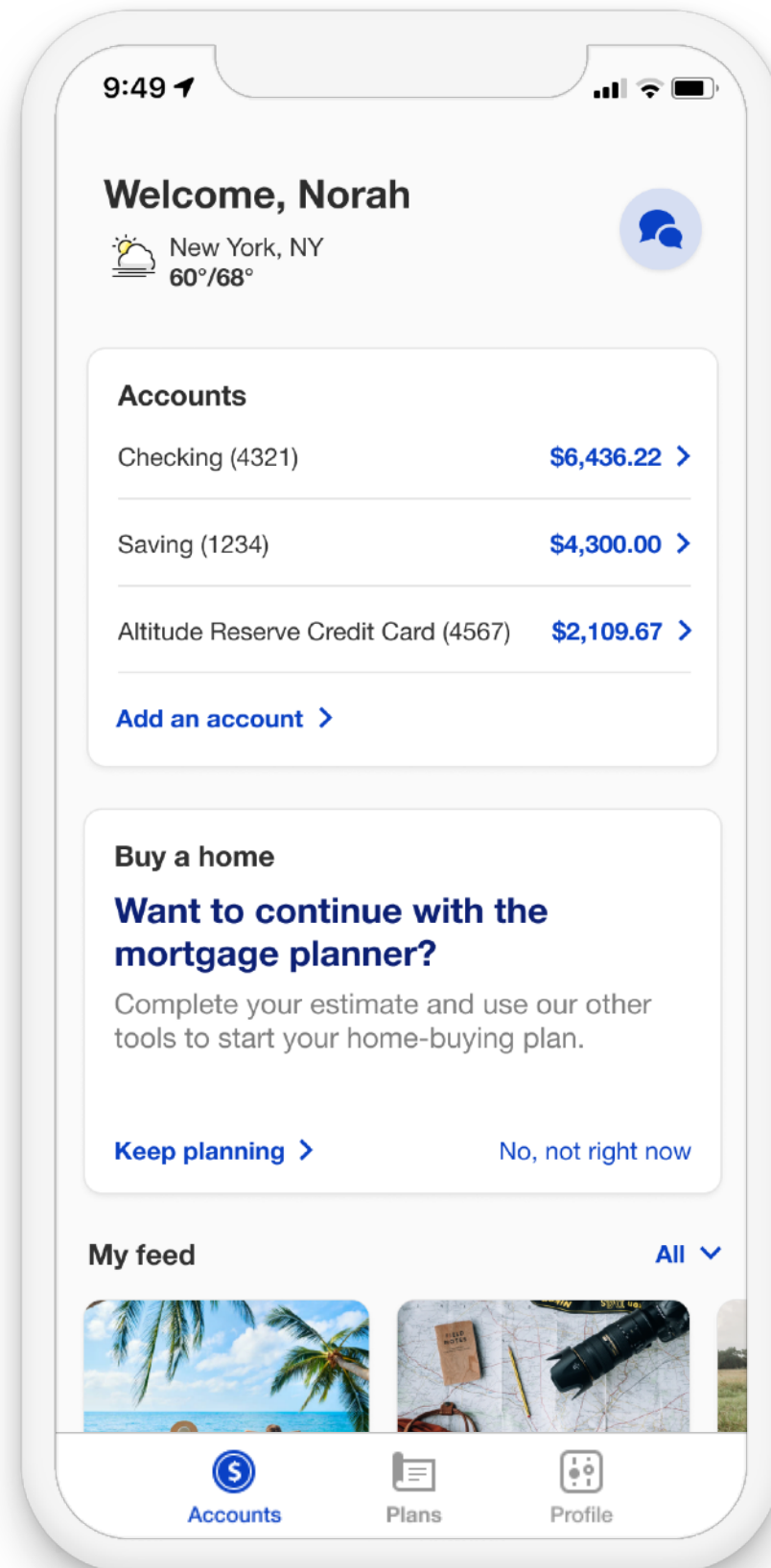
Now that we've consolidated our debt, I'm getting more hopeful that we could actually buy a home in the next year or so. We even went to an open house last weekend in our favorite neighborhood.

We have some savings for a down payment, and if we keep paying down our debt according to the plan we set up, we should be able to save even more soon.

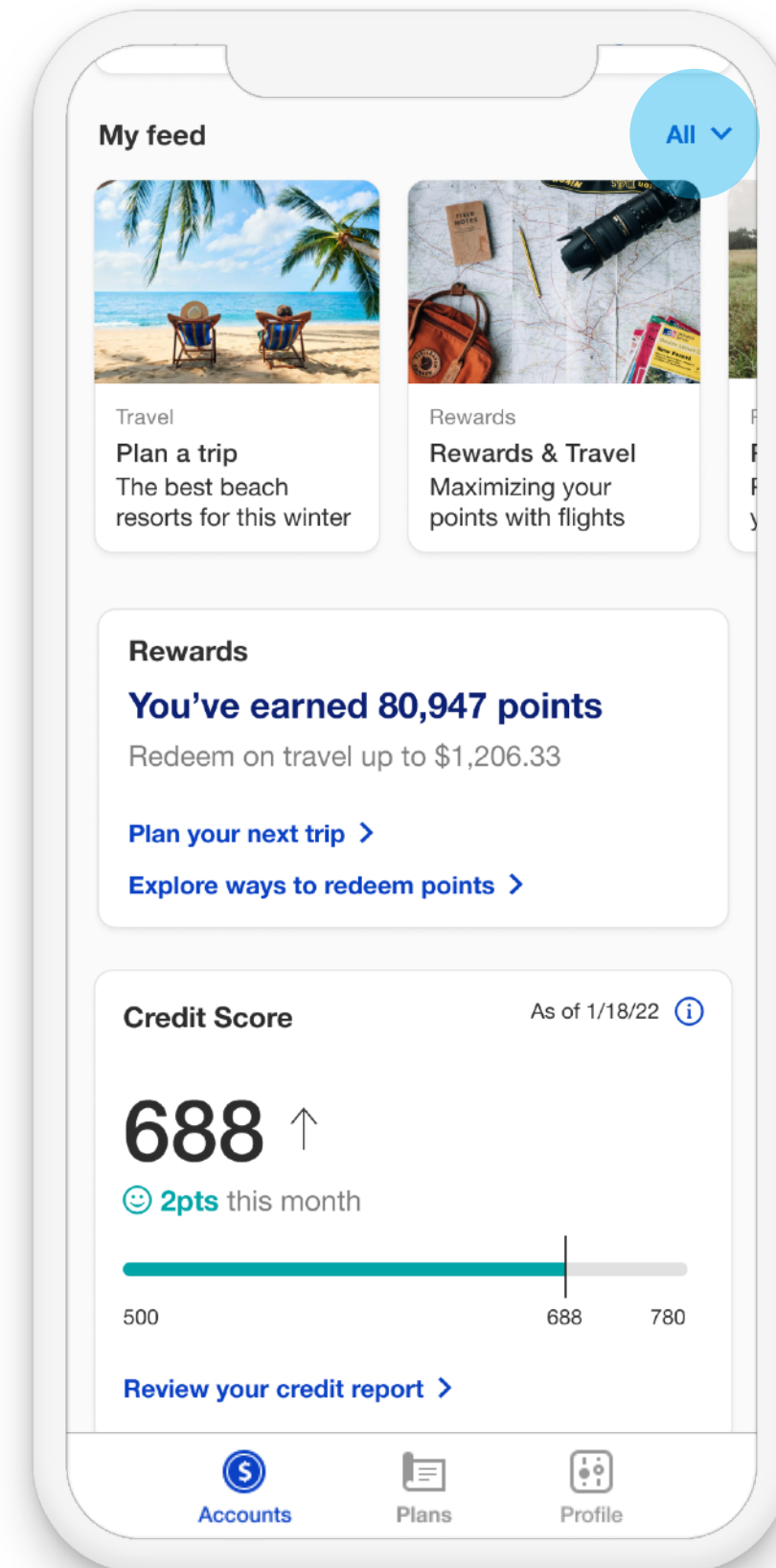
I think I'll look for a mortgage calculator online and start plugging in some numbers.



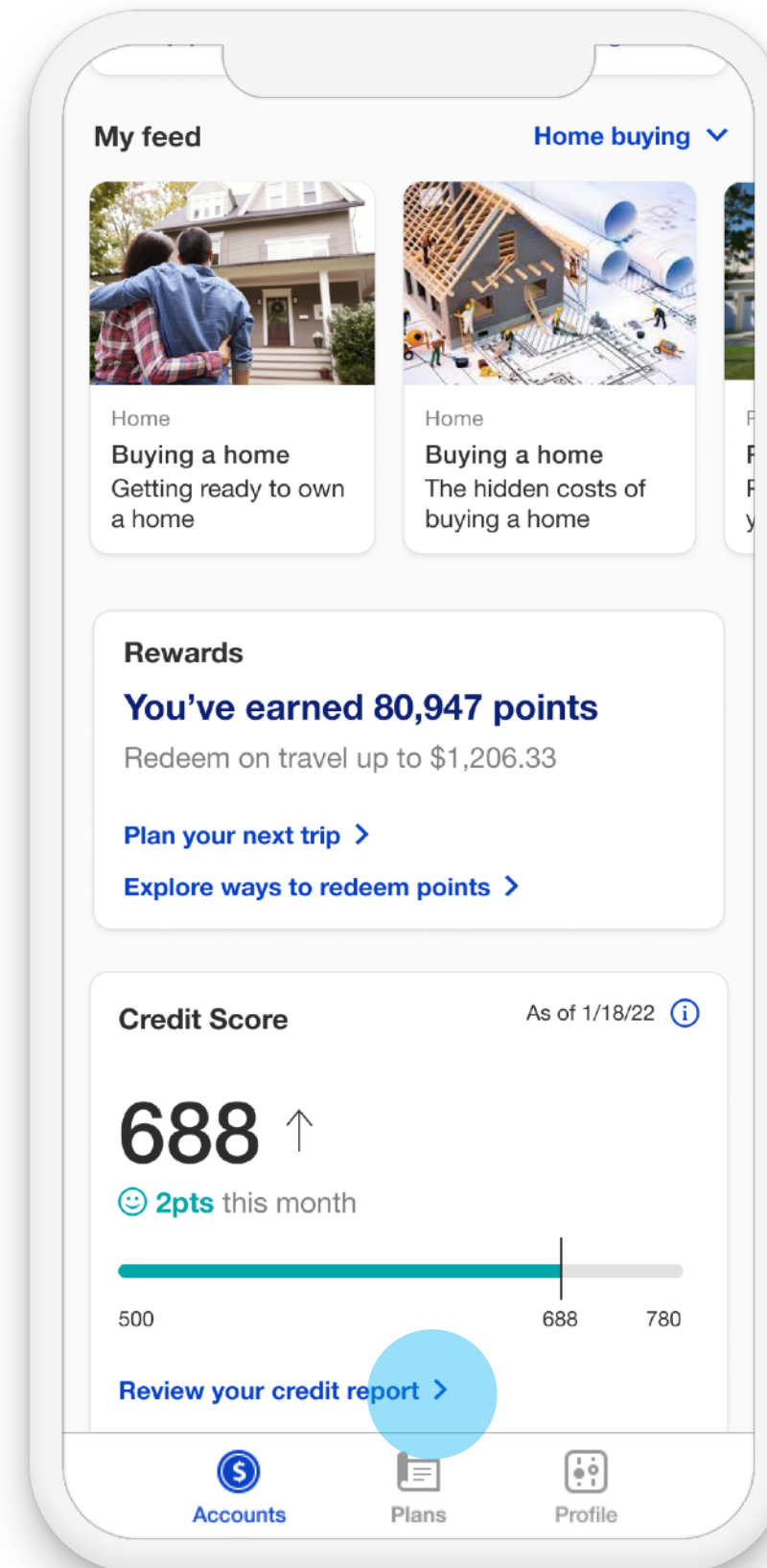
Norah's home buying experience



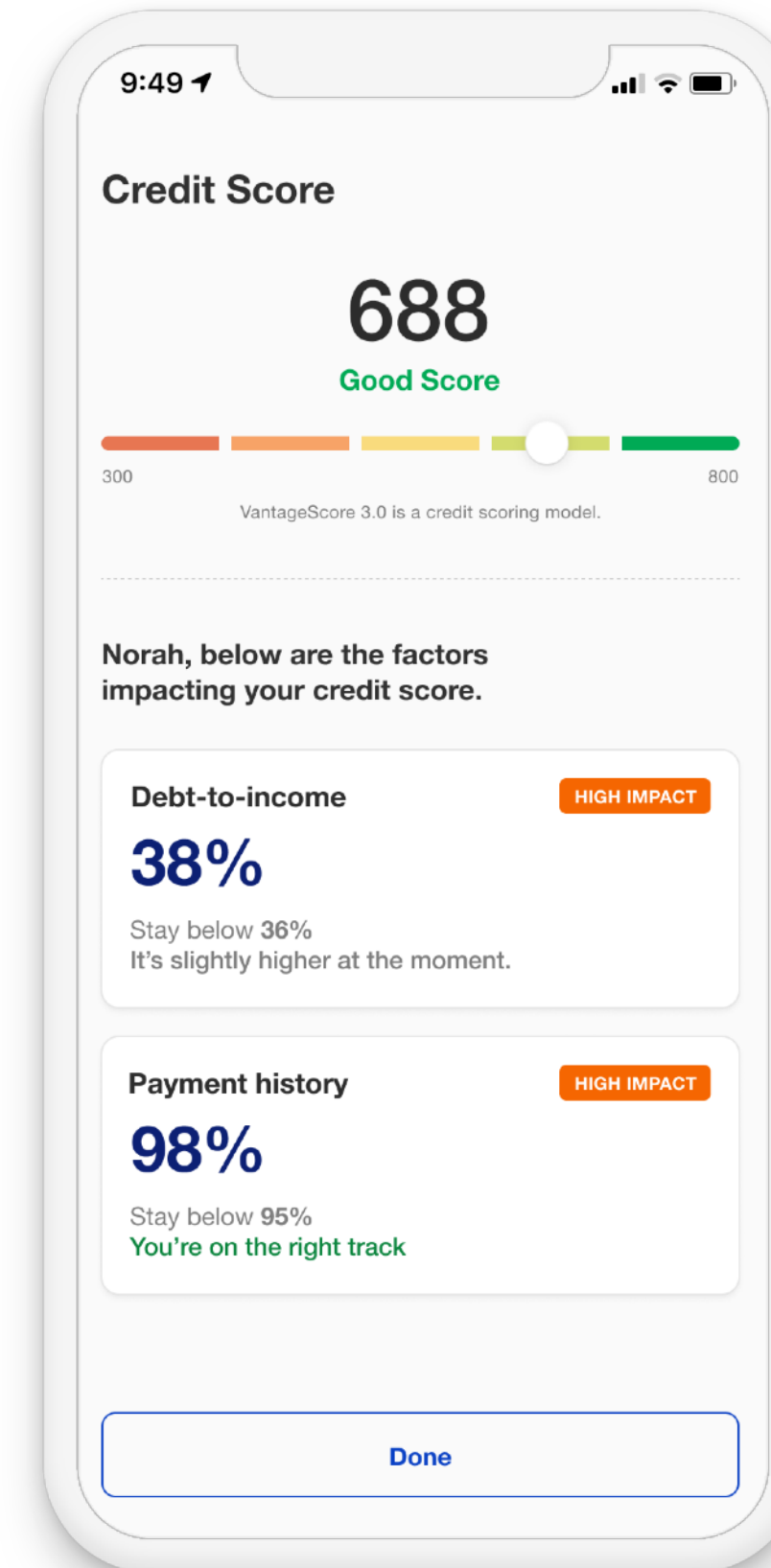
1. Norah comes into her **Accounts** and sees a mortgage planner prompt to pick up where she left off with the usbank.com mortgage tools.



2. She also sees in her feed that she can filter content by category.

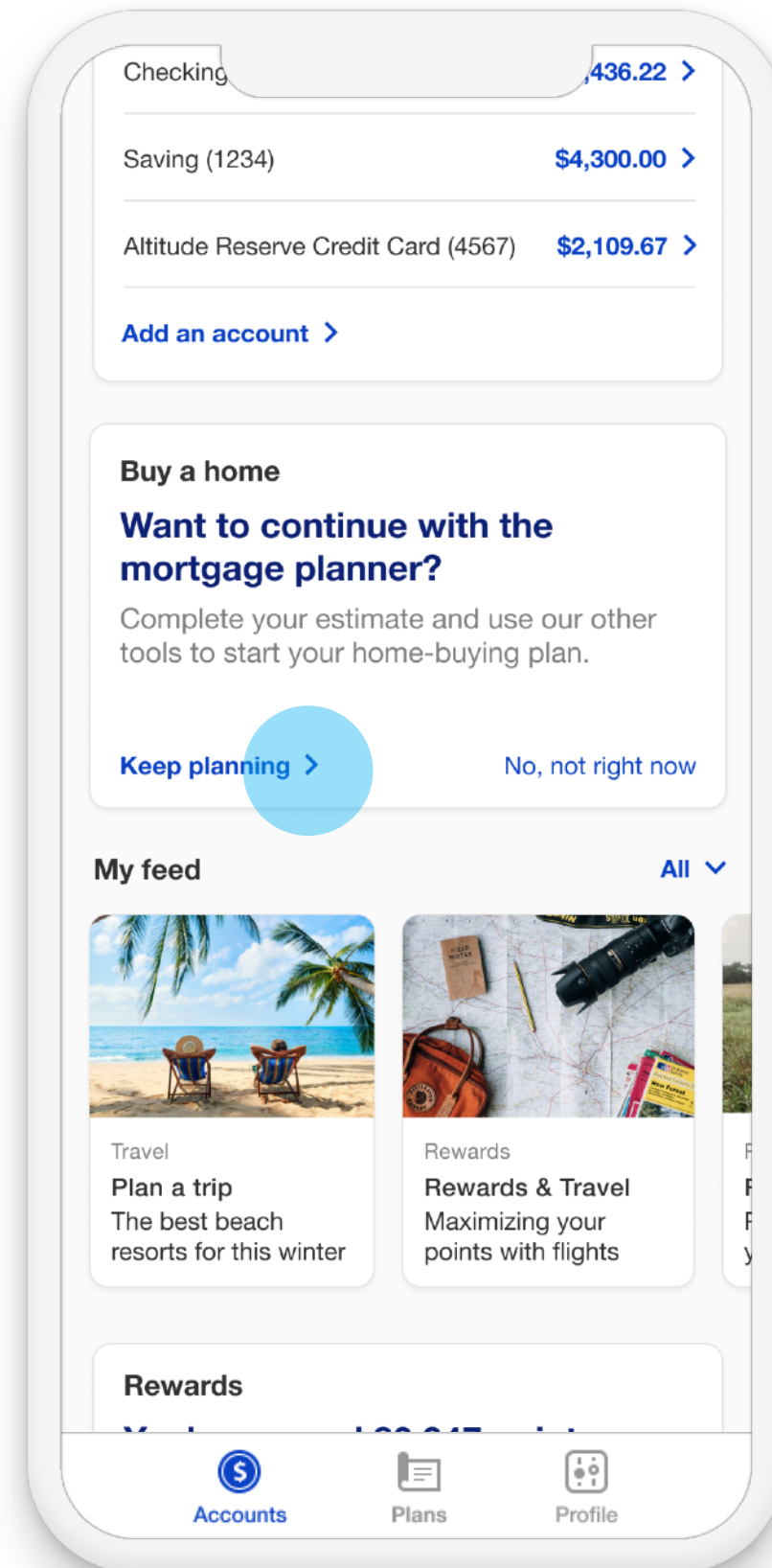


3. She can explore articles for home buying and notices that her credit score appears in the feed.

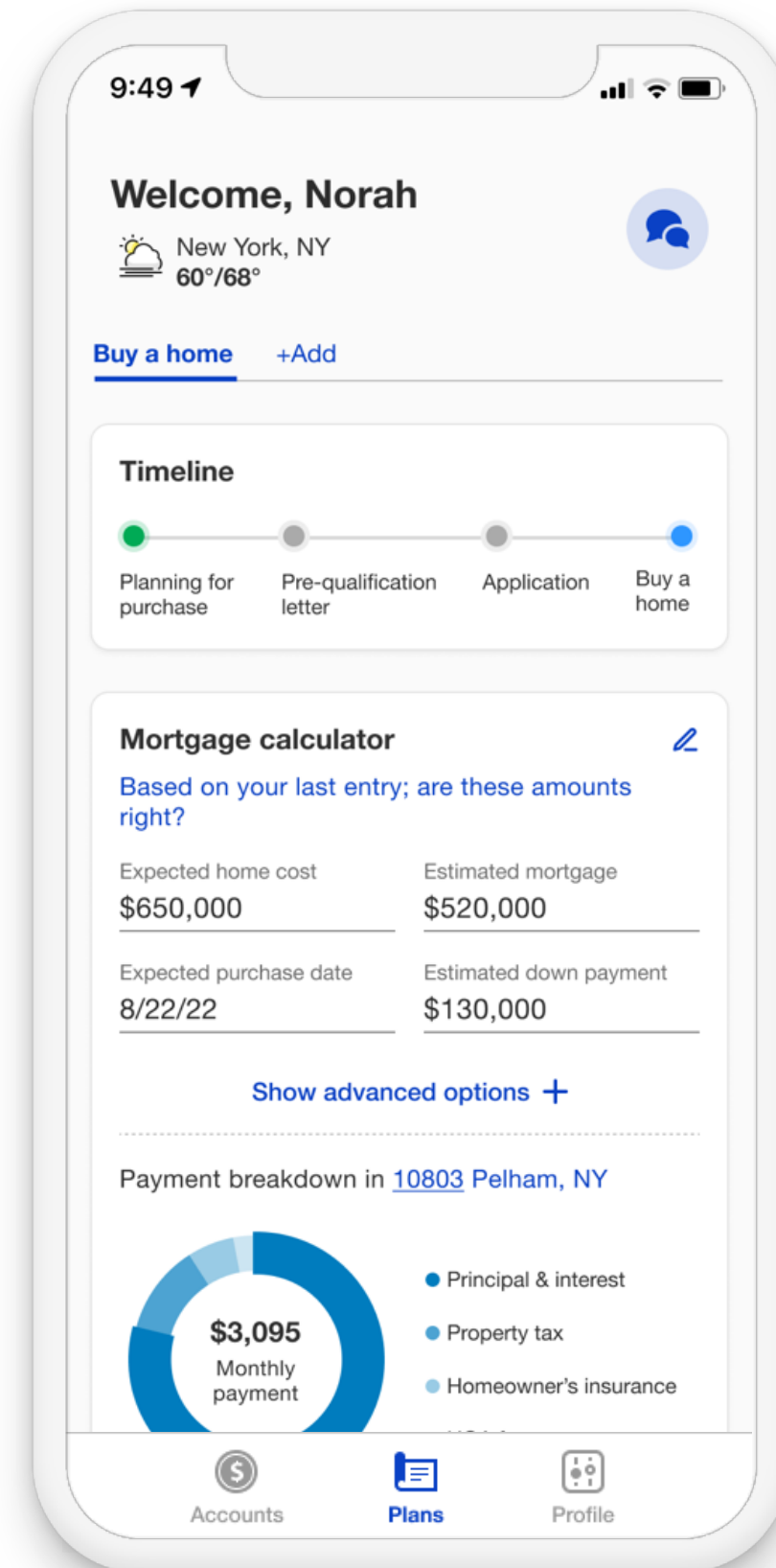


4. She explores her credit score and sees some advice on how to improve her score.

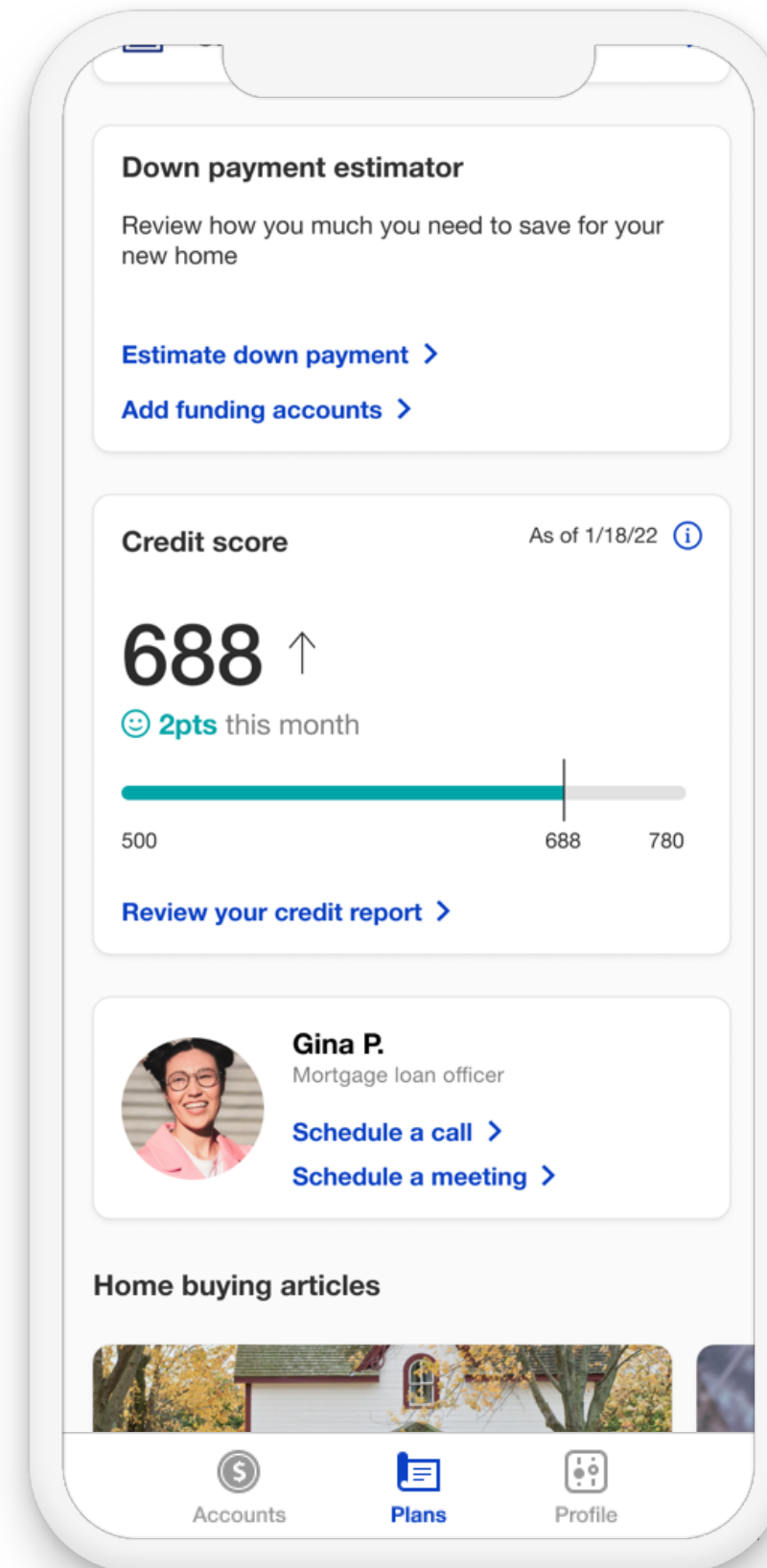
Norah's home buying experience



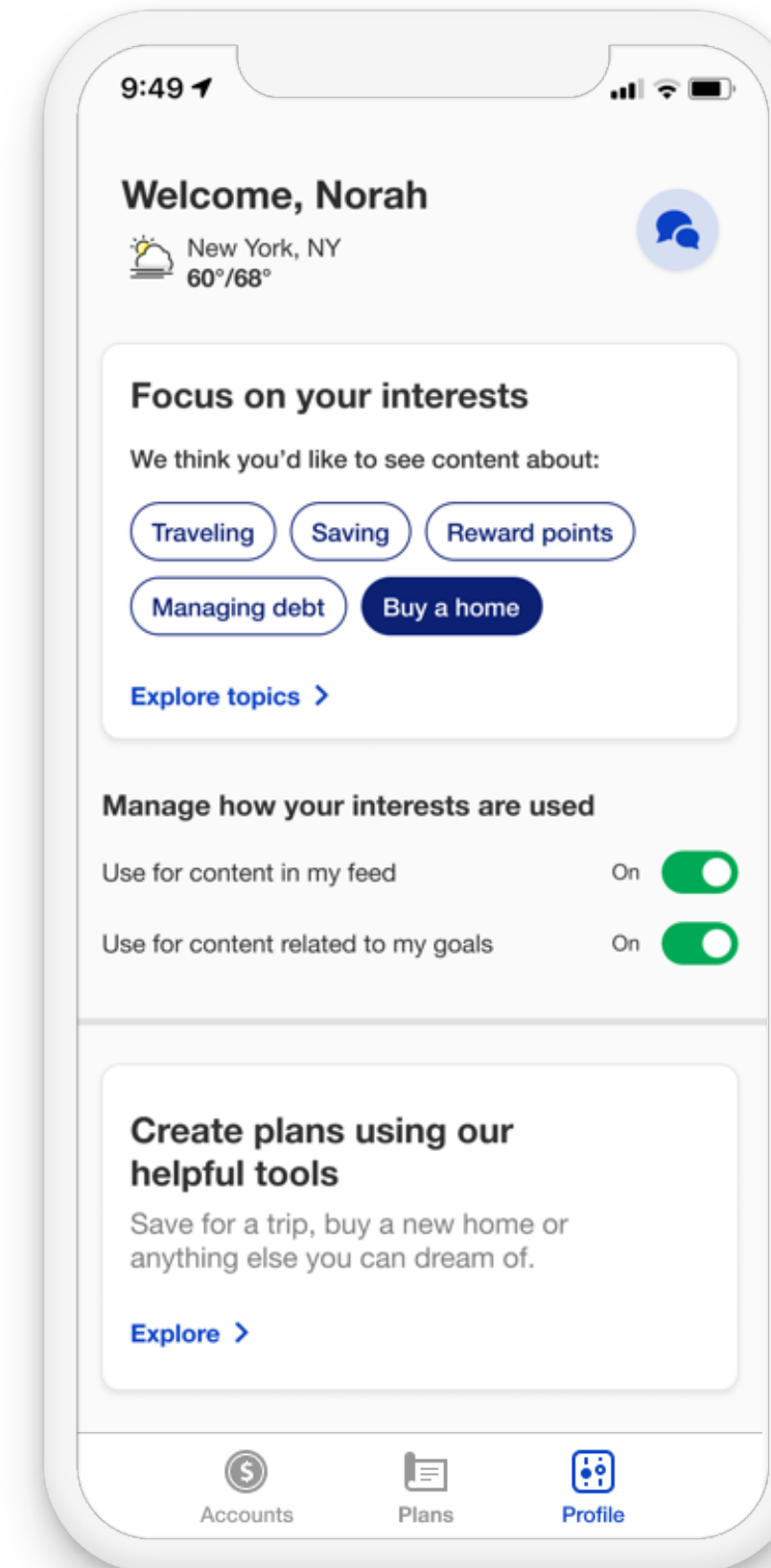
5. Norah chooses to continue with her mortgage planner tool from the tile on **Accounts**.



6. She lands on her **Buy a home Plan**, where she sees the calculator pre-populated with details she was using before.

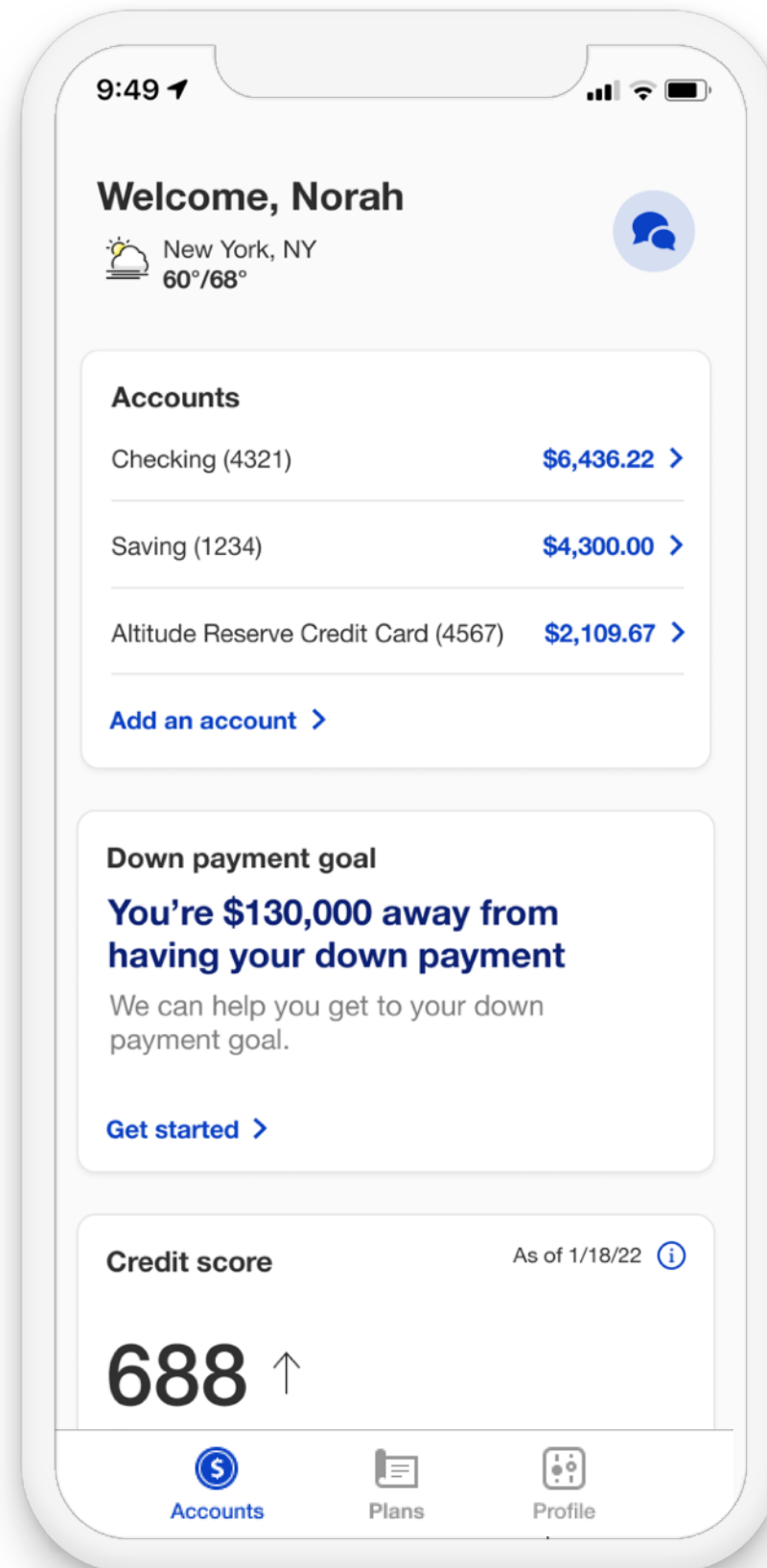


7. She sees she has a loan officer assigned to her who can be easily contacted if she wants to continue this plan offline.

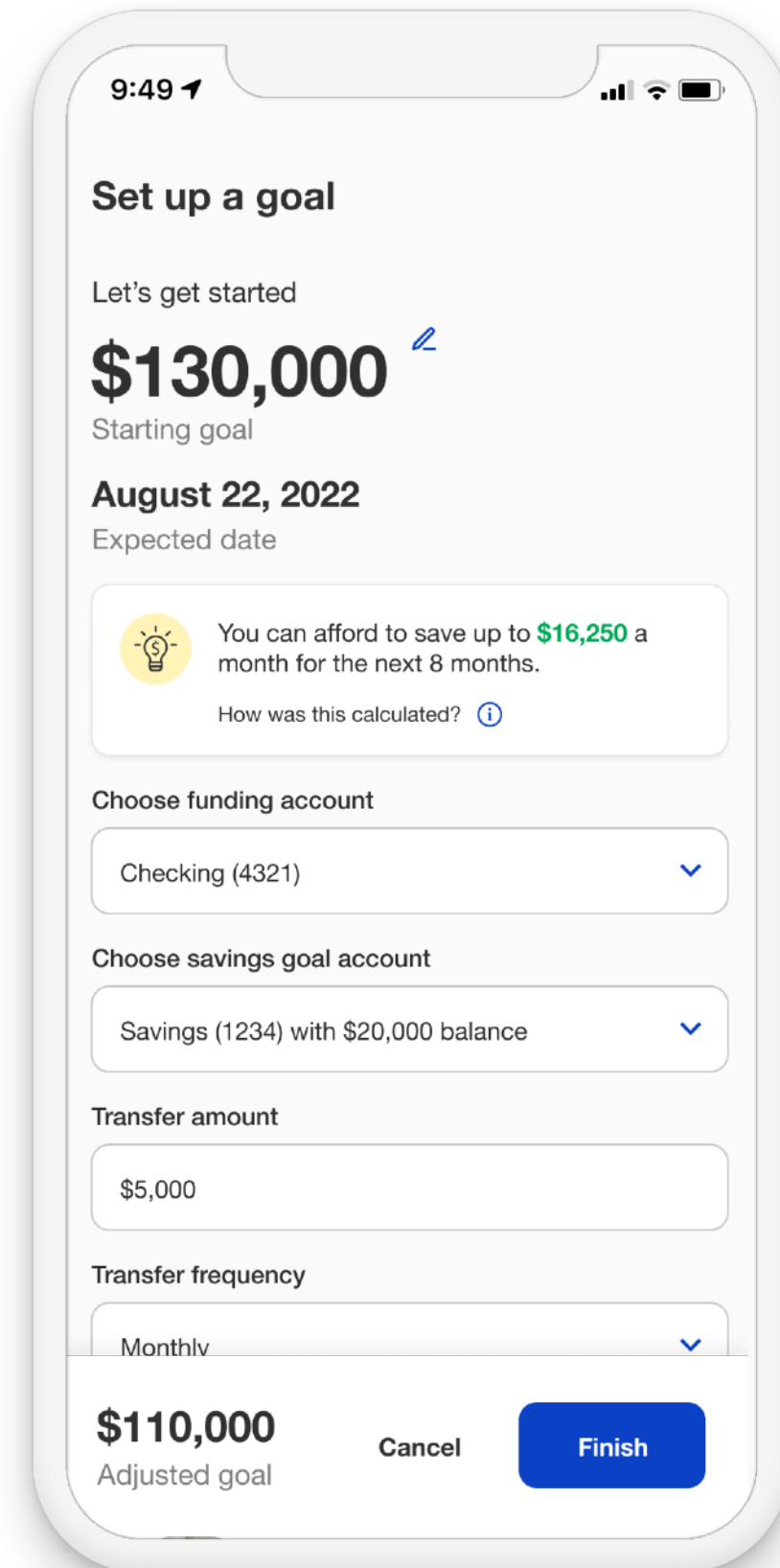


8. As Norah navigates to her **Profile**, she sees **Buy a home** added to her interests.

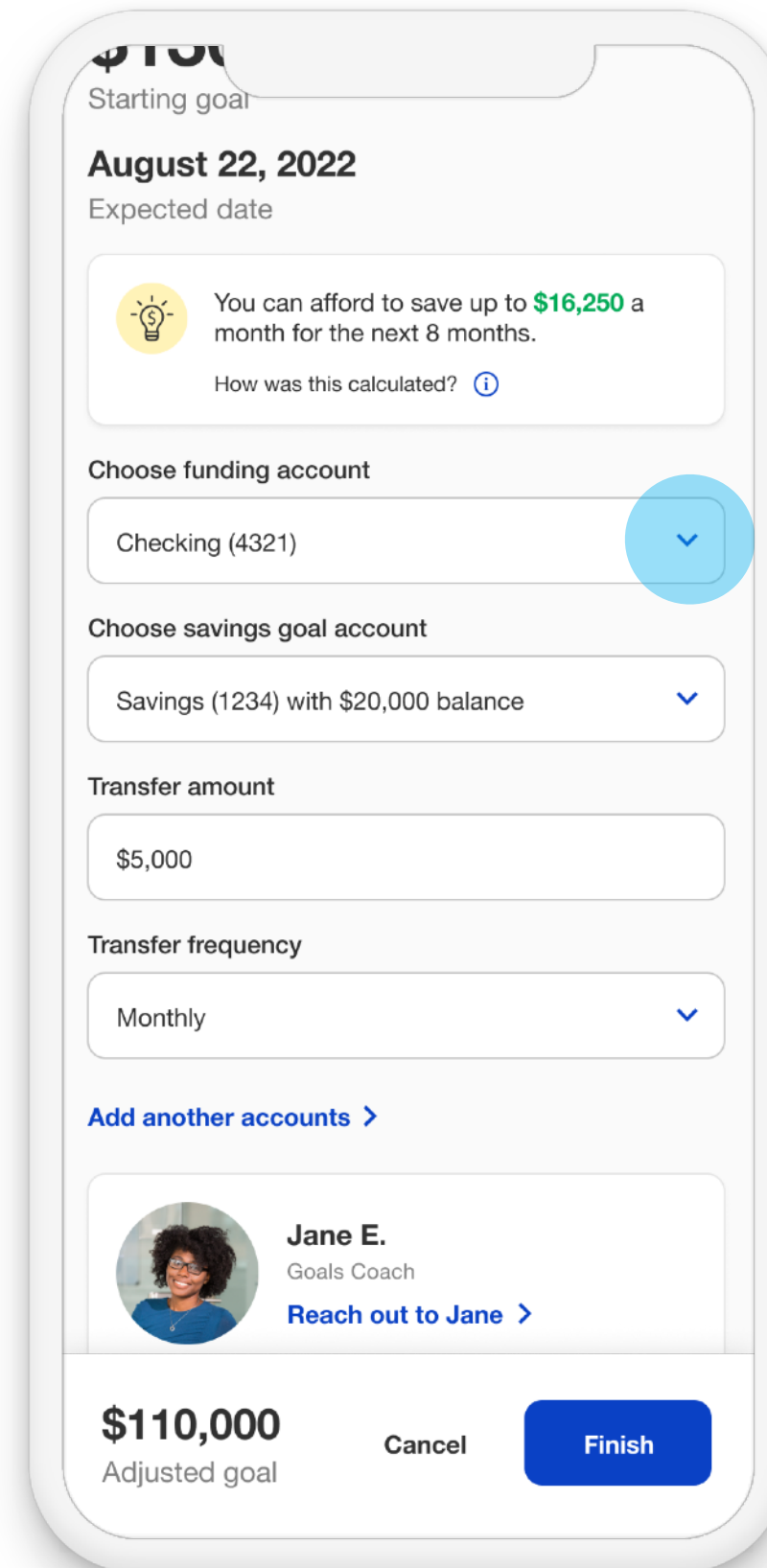
Norah's home buying experience



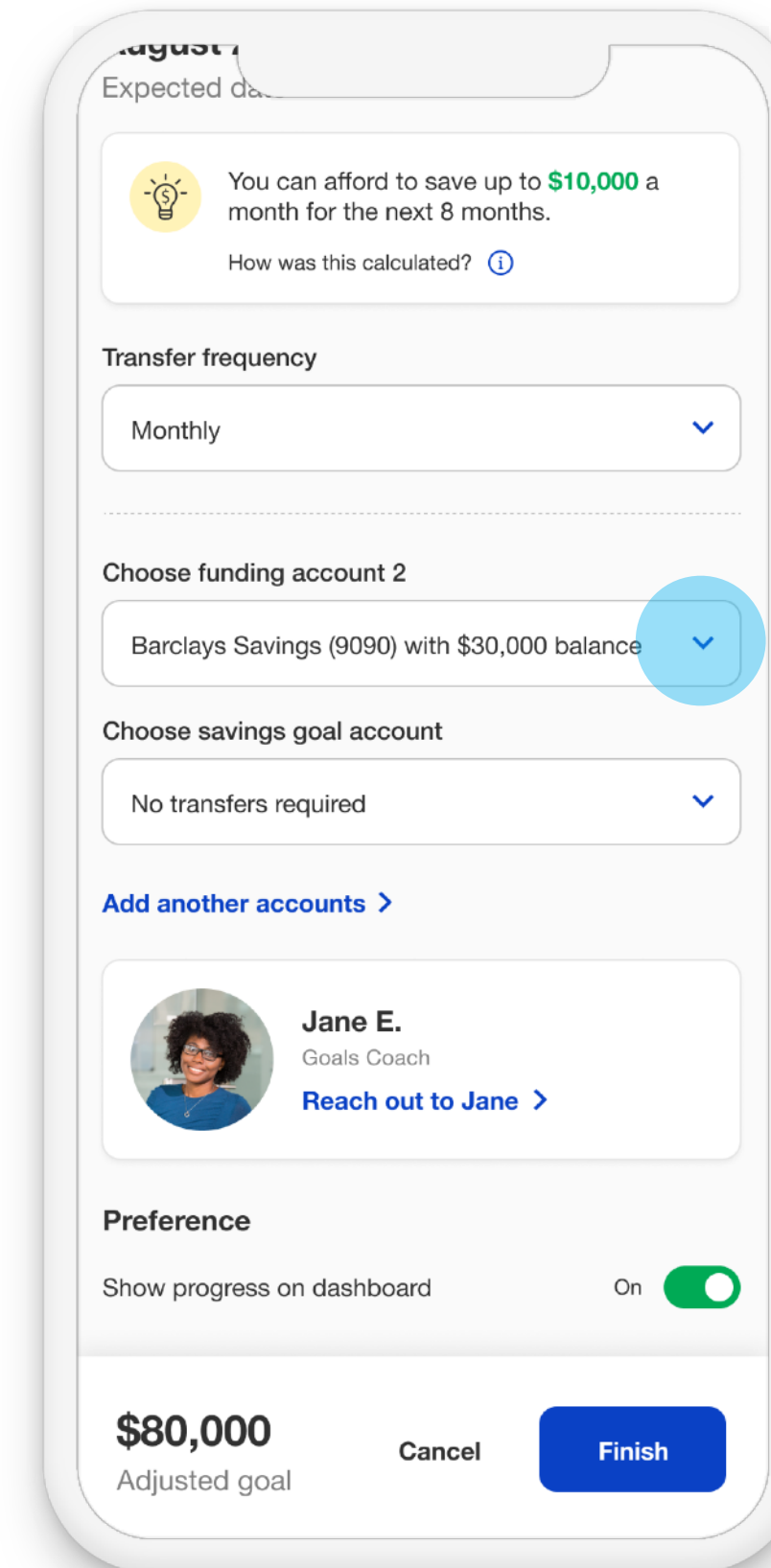
9. In **Accounts**, Norah is prompted to explore setting a down payment goal based on her calculations.



10. She sees the down payment she defined previously and sees some helpful tips to help set up her goal.

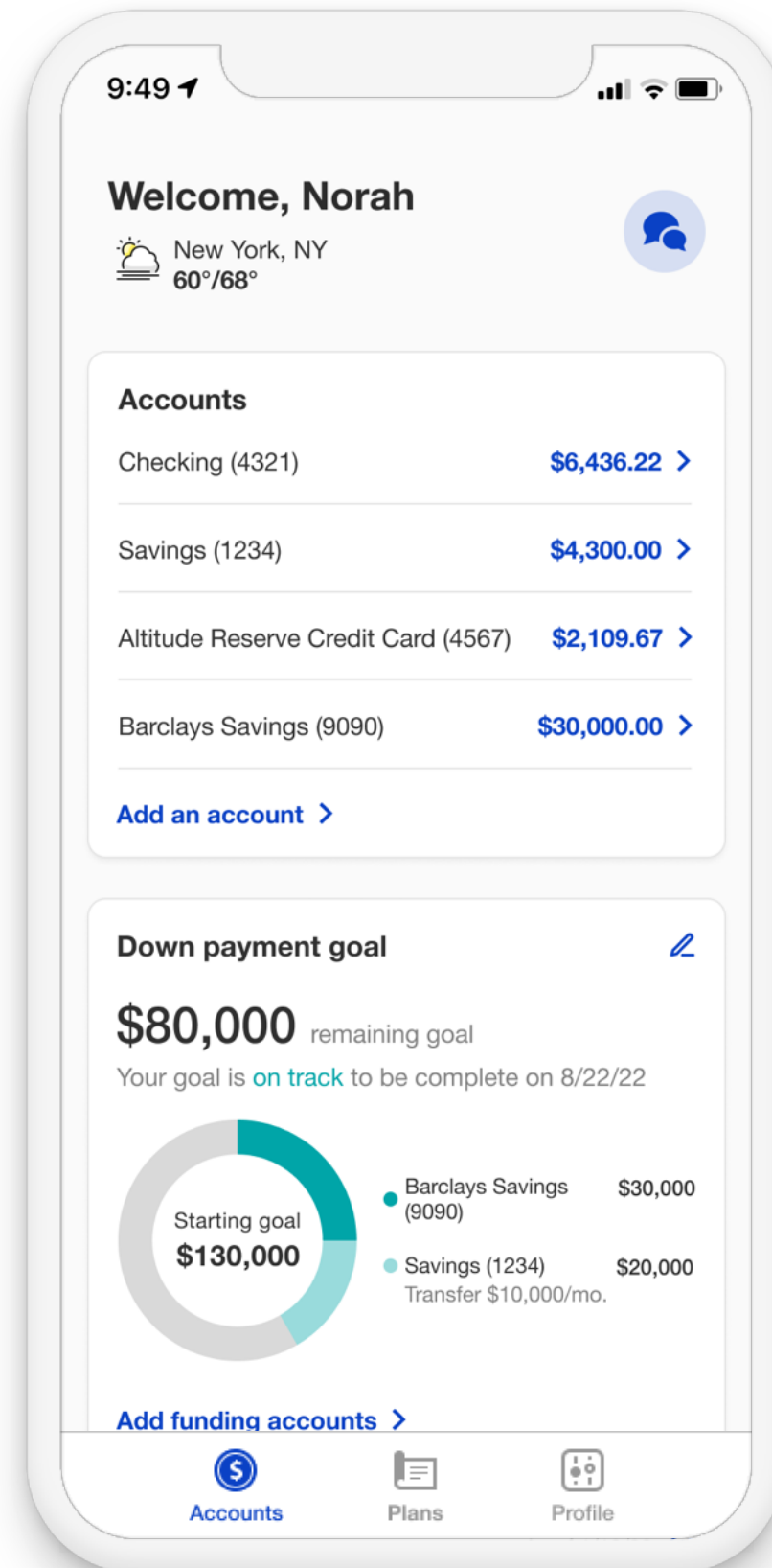


11. She first adds her U.S. Bank savings account, and then sets up a recurring transfer to add money from her checking account.

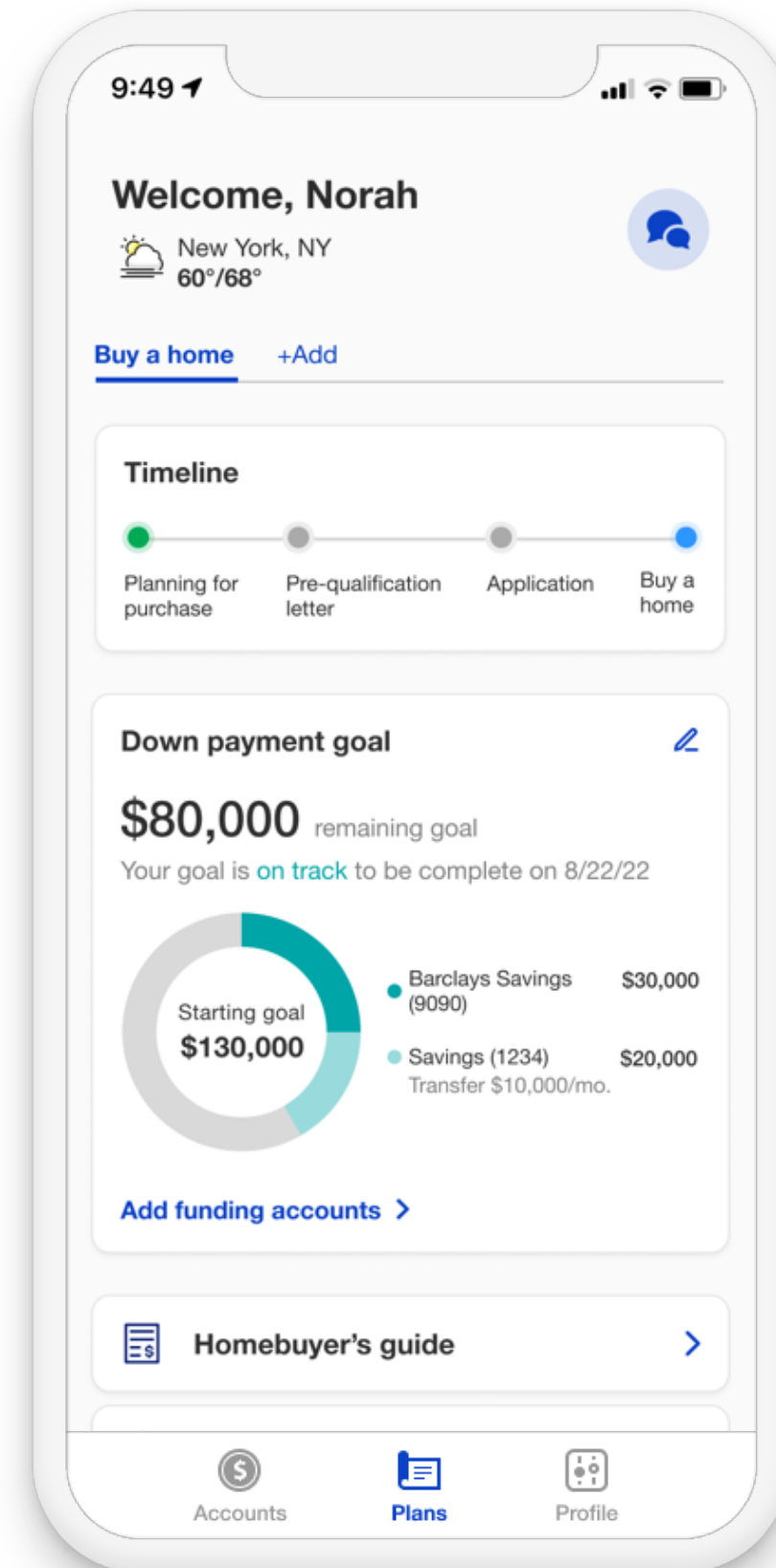


12. She then adds her external Barclays savings account and finishes with her adjusted down payment goal.

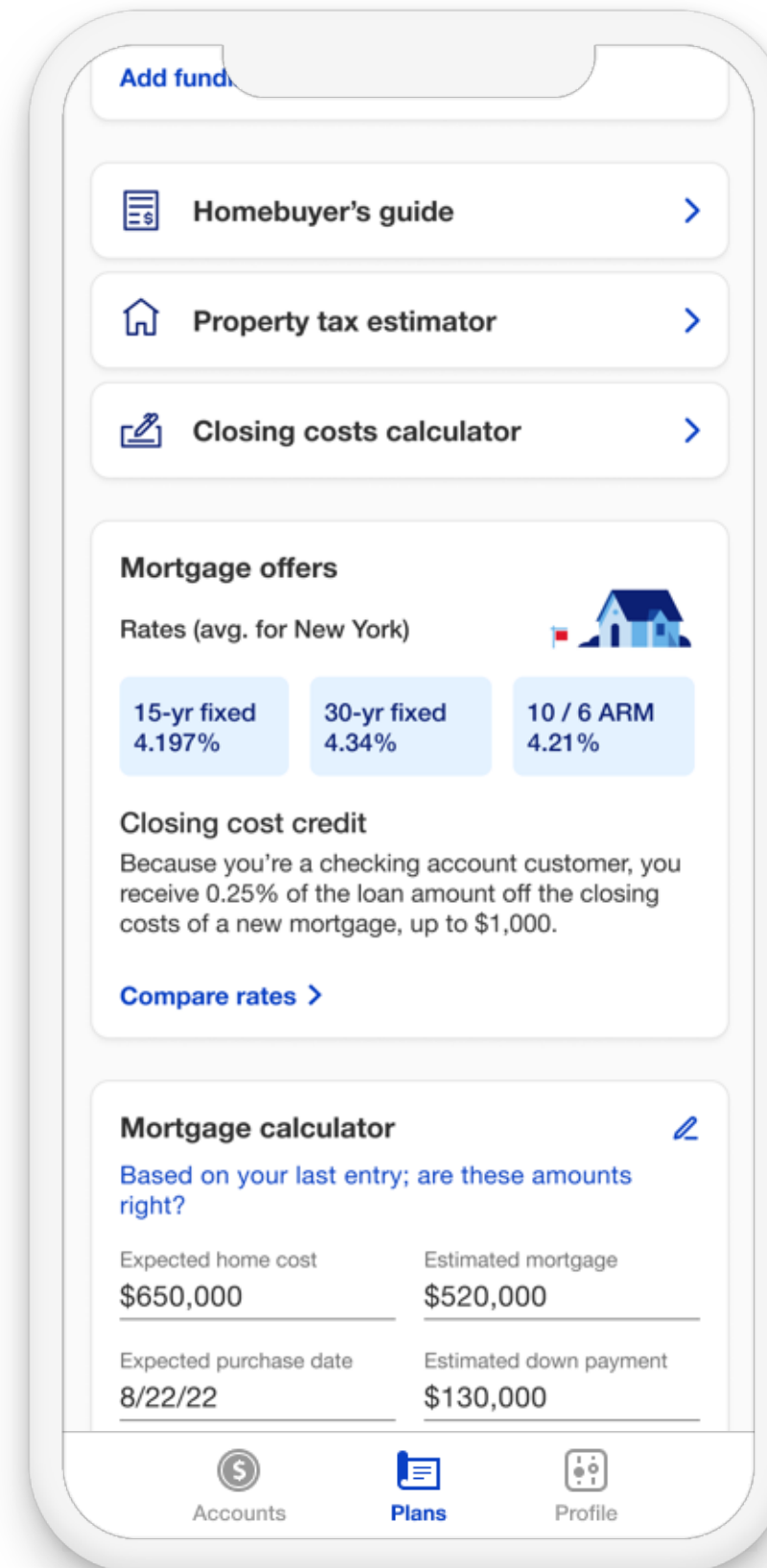
Norah's home buying experience



13. Norah returns to her **Accounts** page and can track her progress on her down payment goal.

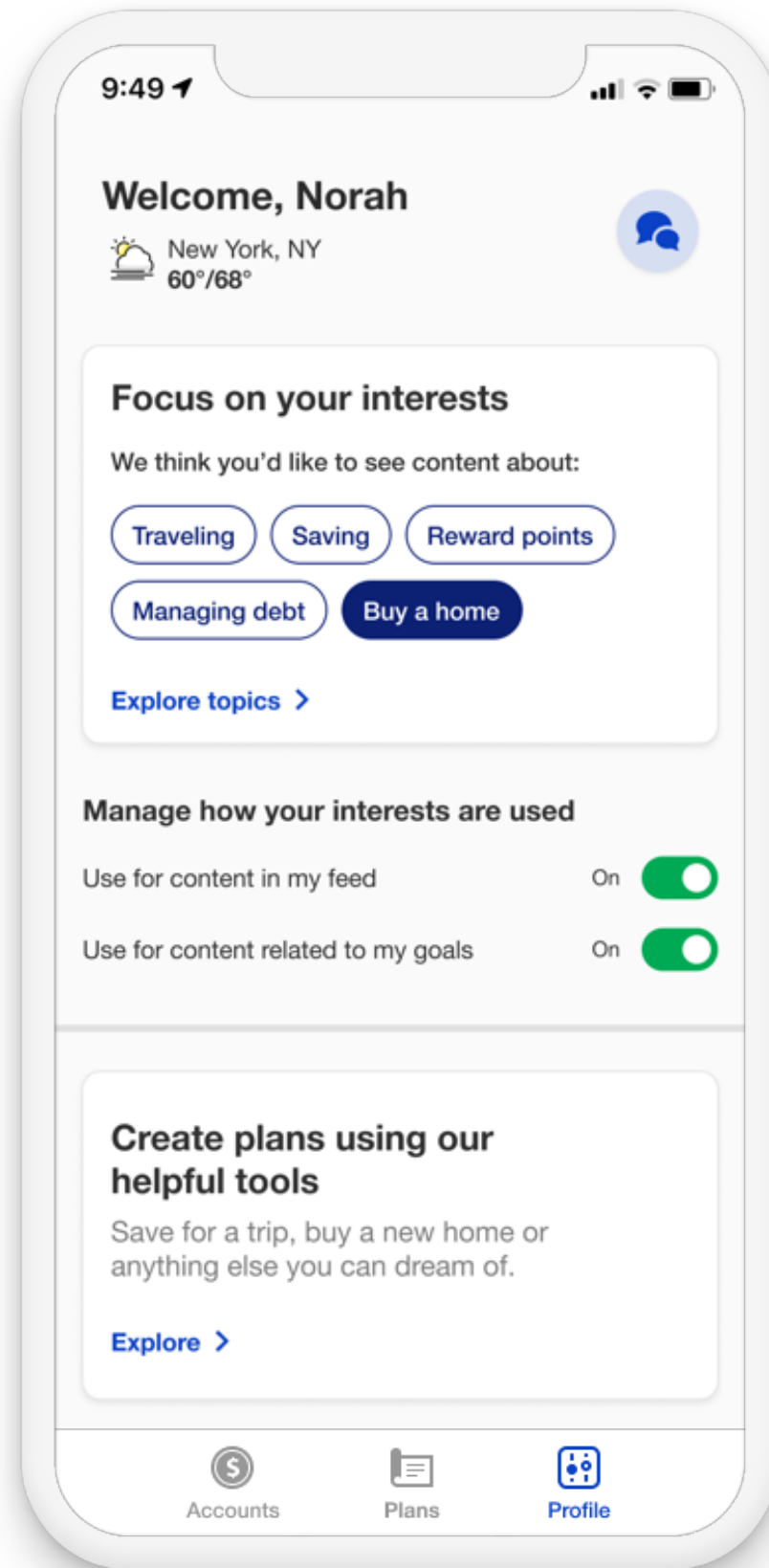


14. As she navigates to her **Buy a home Plan**, she sees her down payment goal is also available.

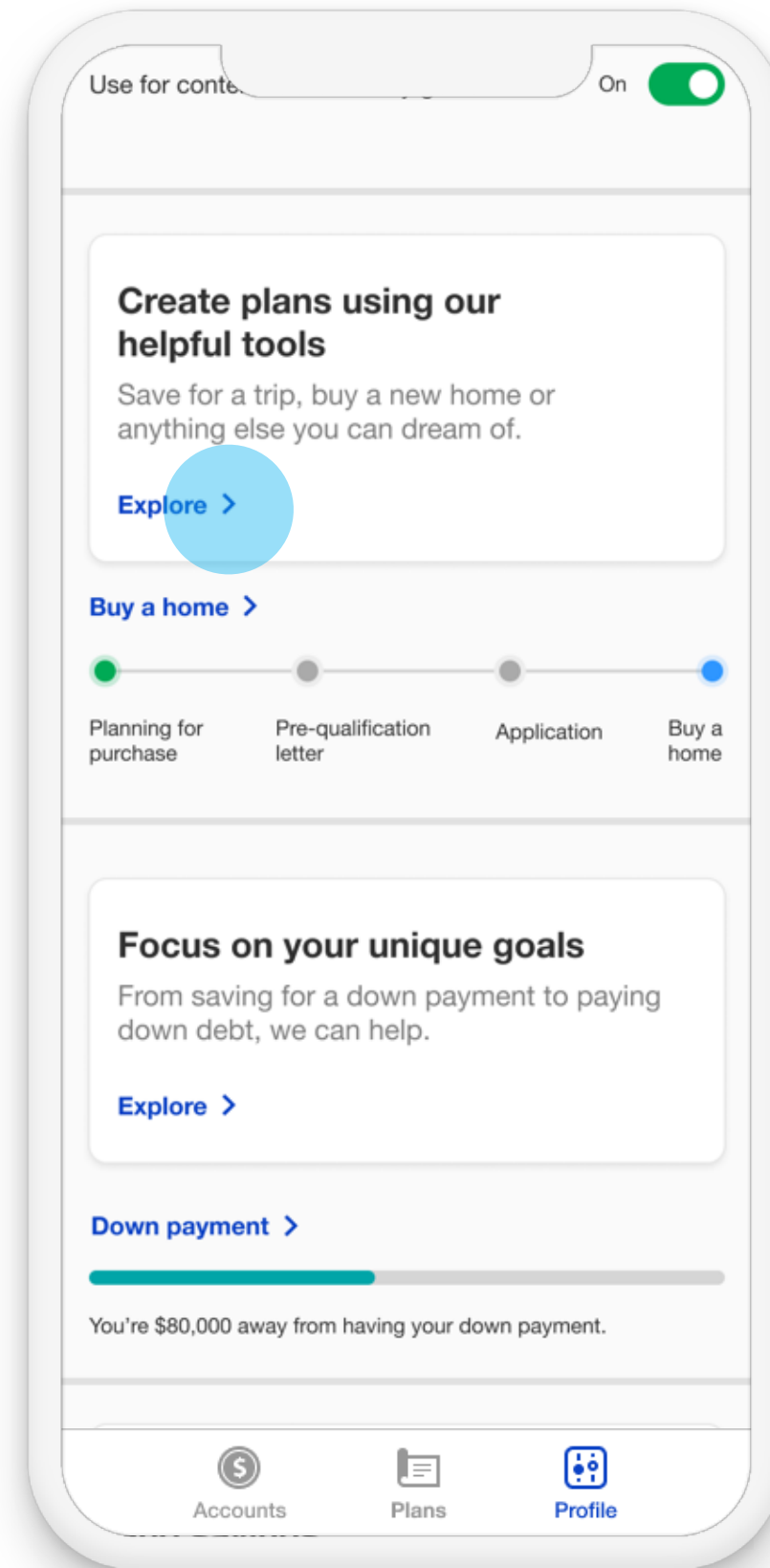


15. She sees that she has access to preferential mortgage rates and closing cost credits.

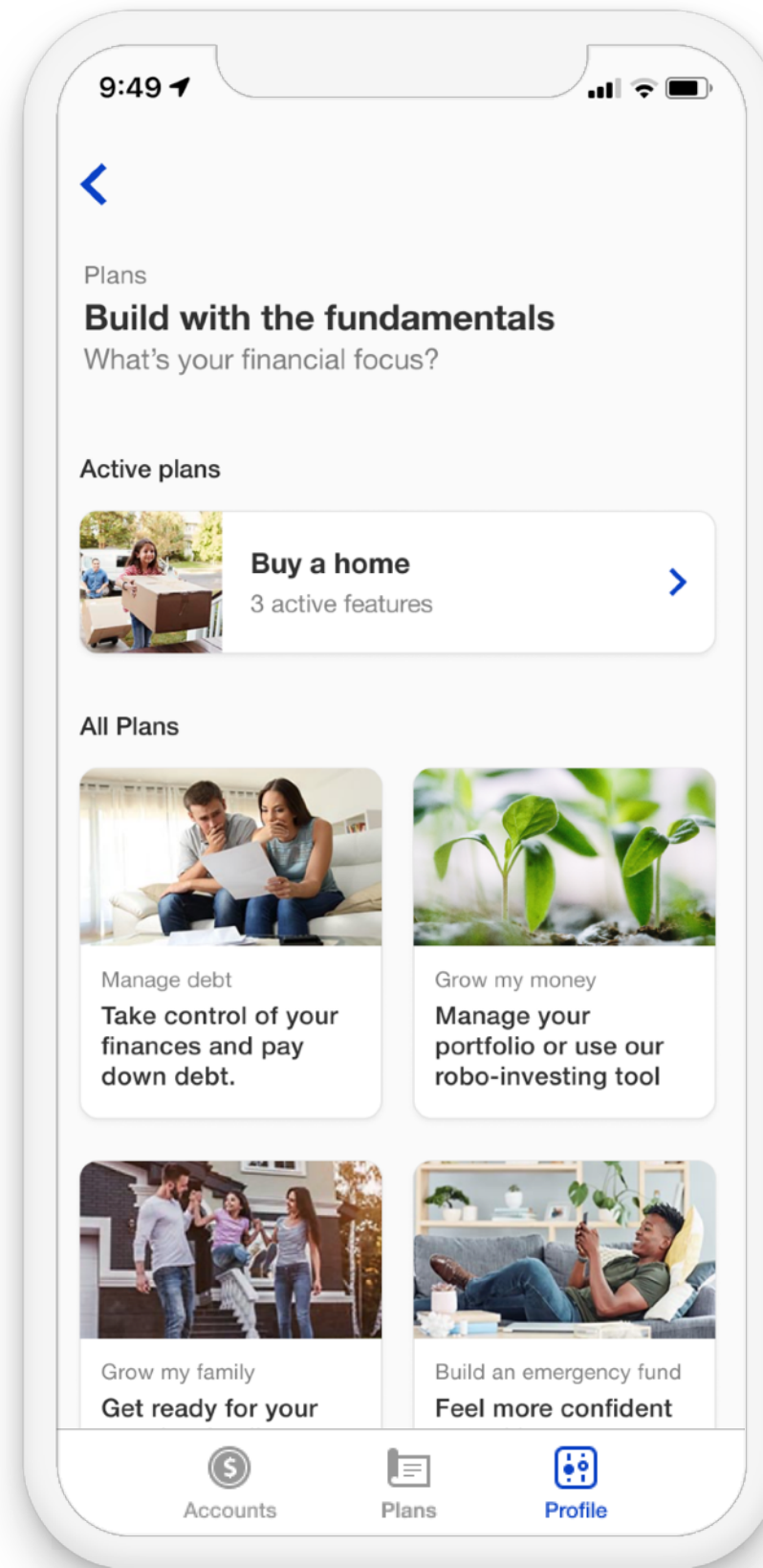
Norah's home buying experience



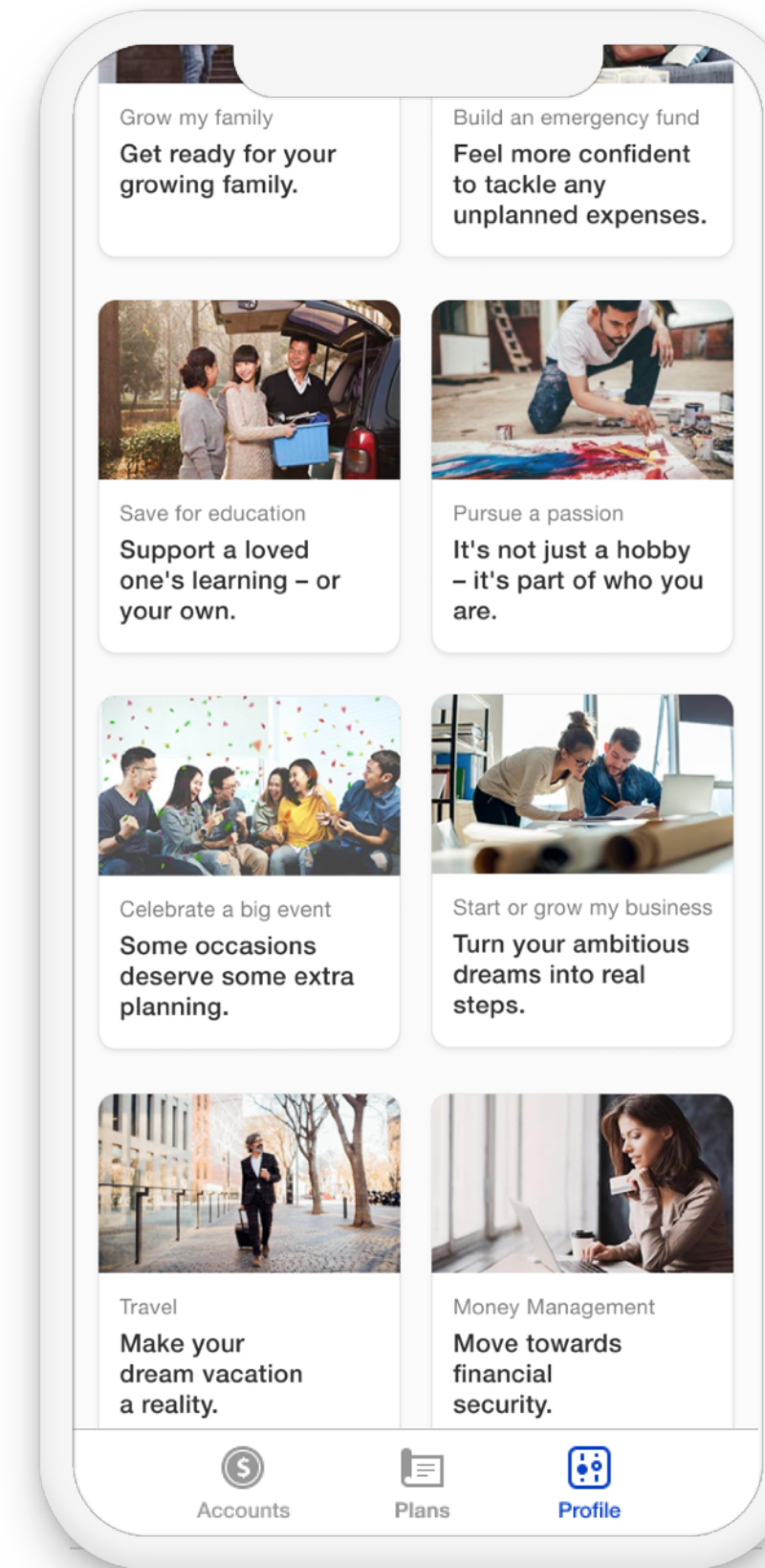
16. As Norah navigates back to her **Profile**, she sees her **Buy a home** plan and **Down payment** goal.



17. She navigates to the plans to explore what's available to her.



18. Her **Buy a home** plan is available, showing that she has three active features.



19. She explores the rest of the available plans as she sees what else U.S. Bank could help her with.

Affluent Consumer Experience

ROI

- 5-10% target increase in active users, resulting in higher account balances and product adoption
- Increase in conversion rates for personalized offers
- Increase in adoption of related products such as loans, investment accounts, and premium banking services
- Cost savings from automation & AI
- Higher customer engagement and ecosystem integration
- Personalization, behavioral nudges & financial optimization

Watson for Clinical Trial Matching

Enterprise Software

Experience Strategy

Discovery

Concept Design

Detail Design



Watson for Clinical Trial Matching

Clinical Trial Matching enables clinicians to easily and quickly find relevant clinical trials for eligible patients by automating screening protocols to increase patient recruitment for clinical trial enrollment.

Organization

IBM Watson Health

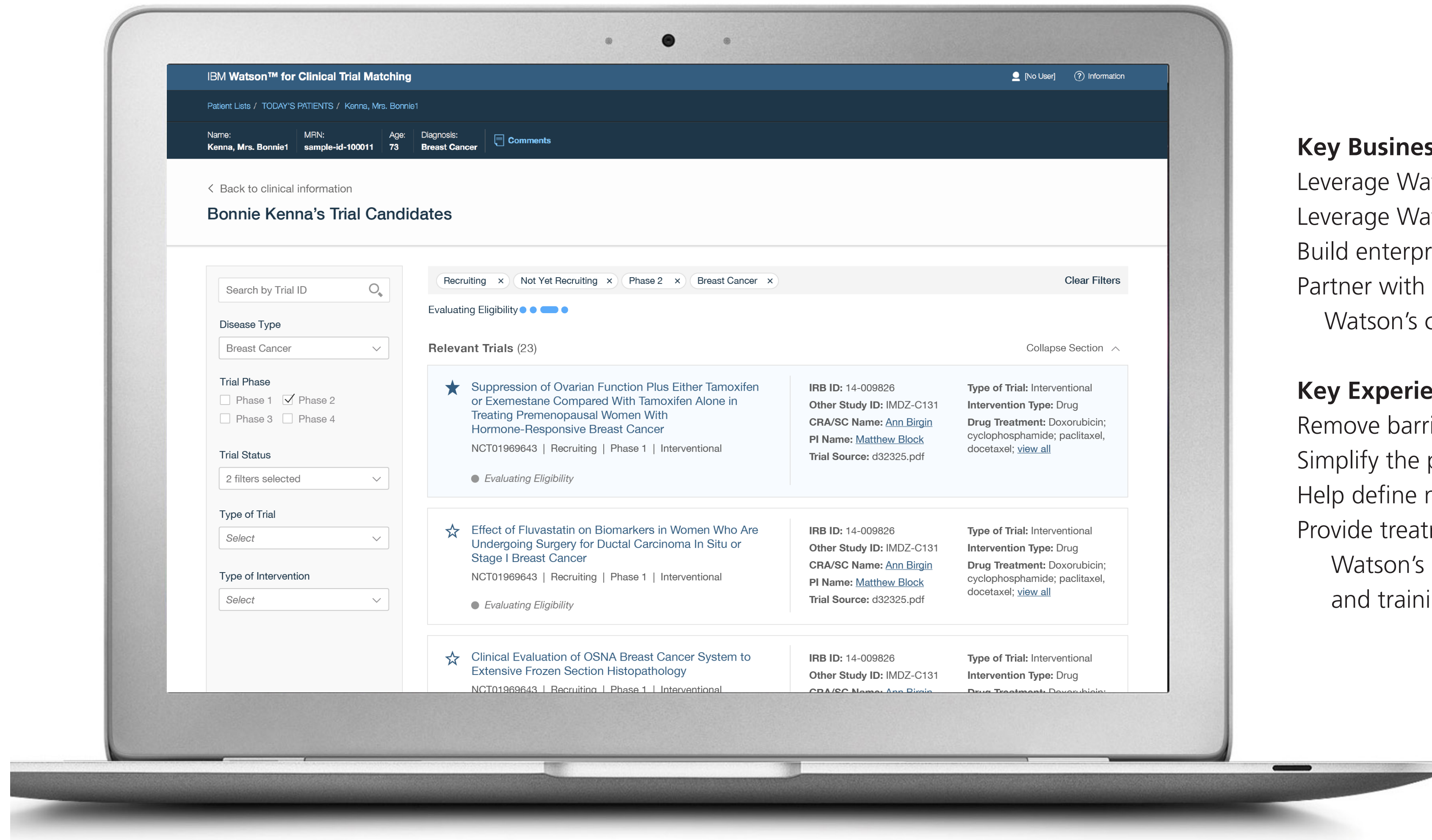
Role

Design Team Lead

Team

8 designers, 4 research

IBM Watson for Clinical Trial Matching



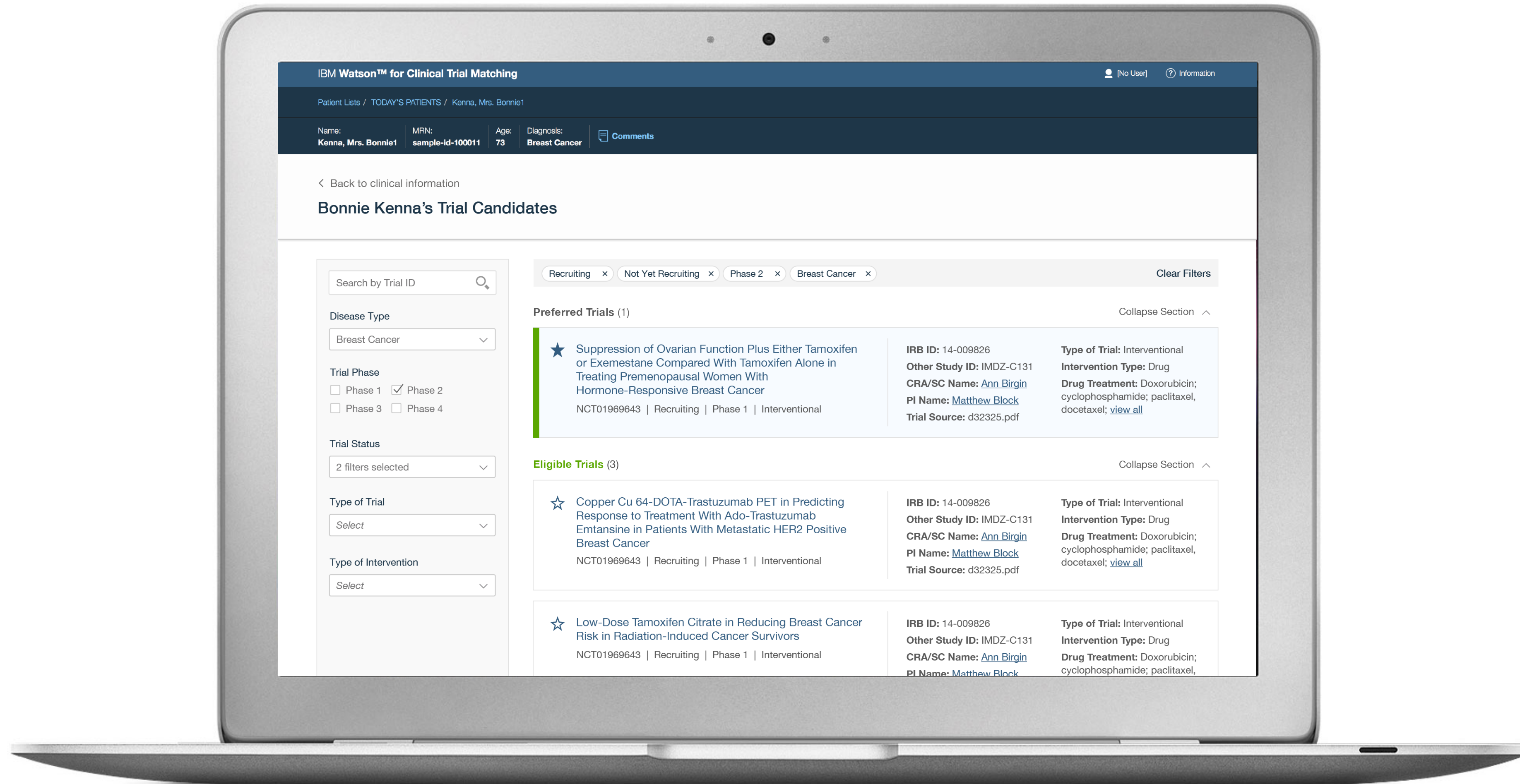
Key Business Objectives

- Leverage Watson to ingest patient data
- Leverage Watson to ingest/parse clinical trial protocols
- Build enterprise software that evals patients to trials
- Partner with hospitals and clinicians to train & improve Watson's cognitive abilities

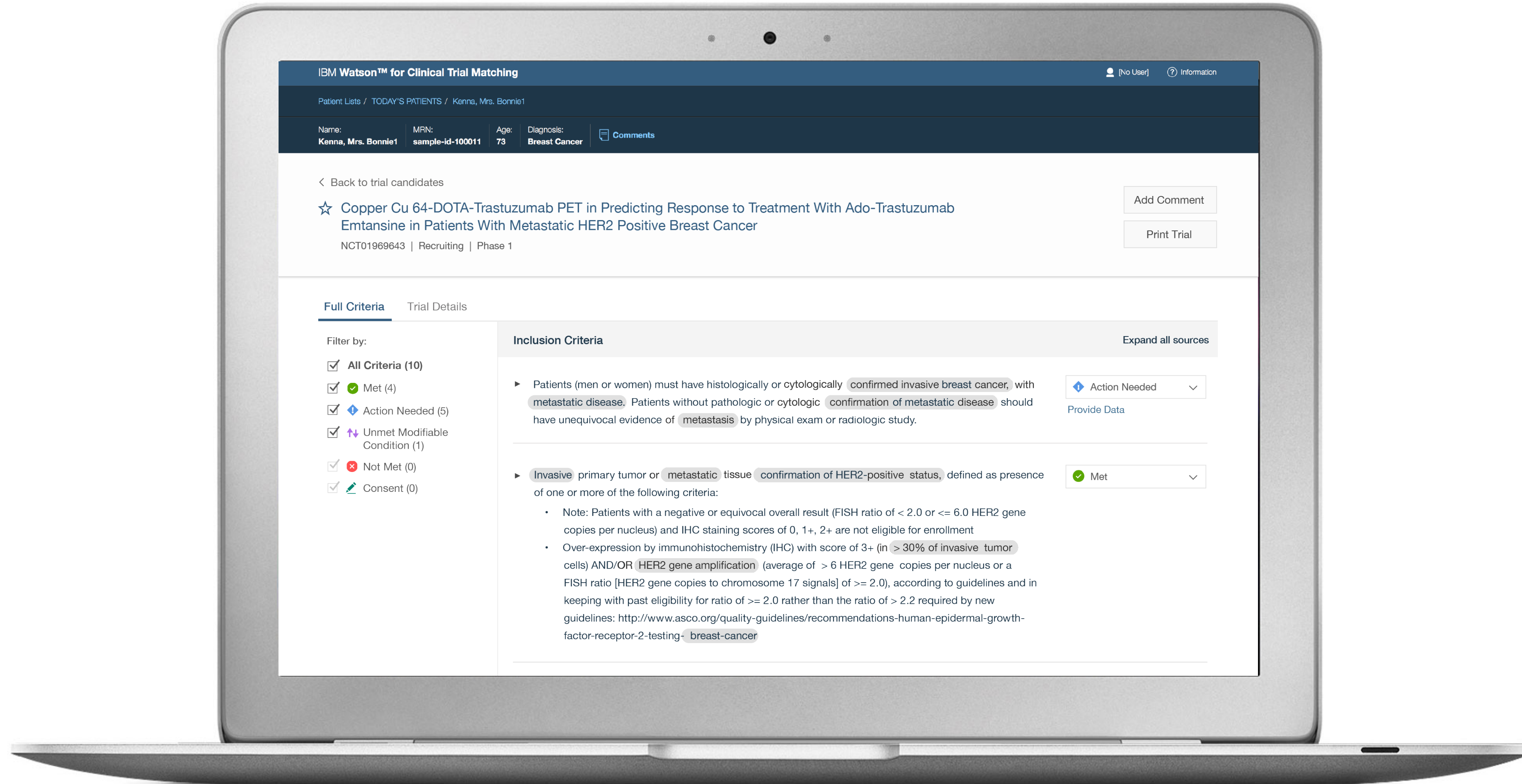
Key Experience Objectives

- Remove barriers for patient enrollment to clinical trials
- Simplify the patient screening process
- Help define new org change management processes
- Provide treatment recommendations based on Watson's ingestion of various medical resources and training programs

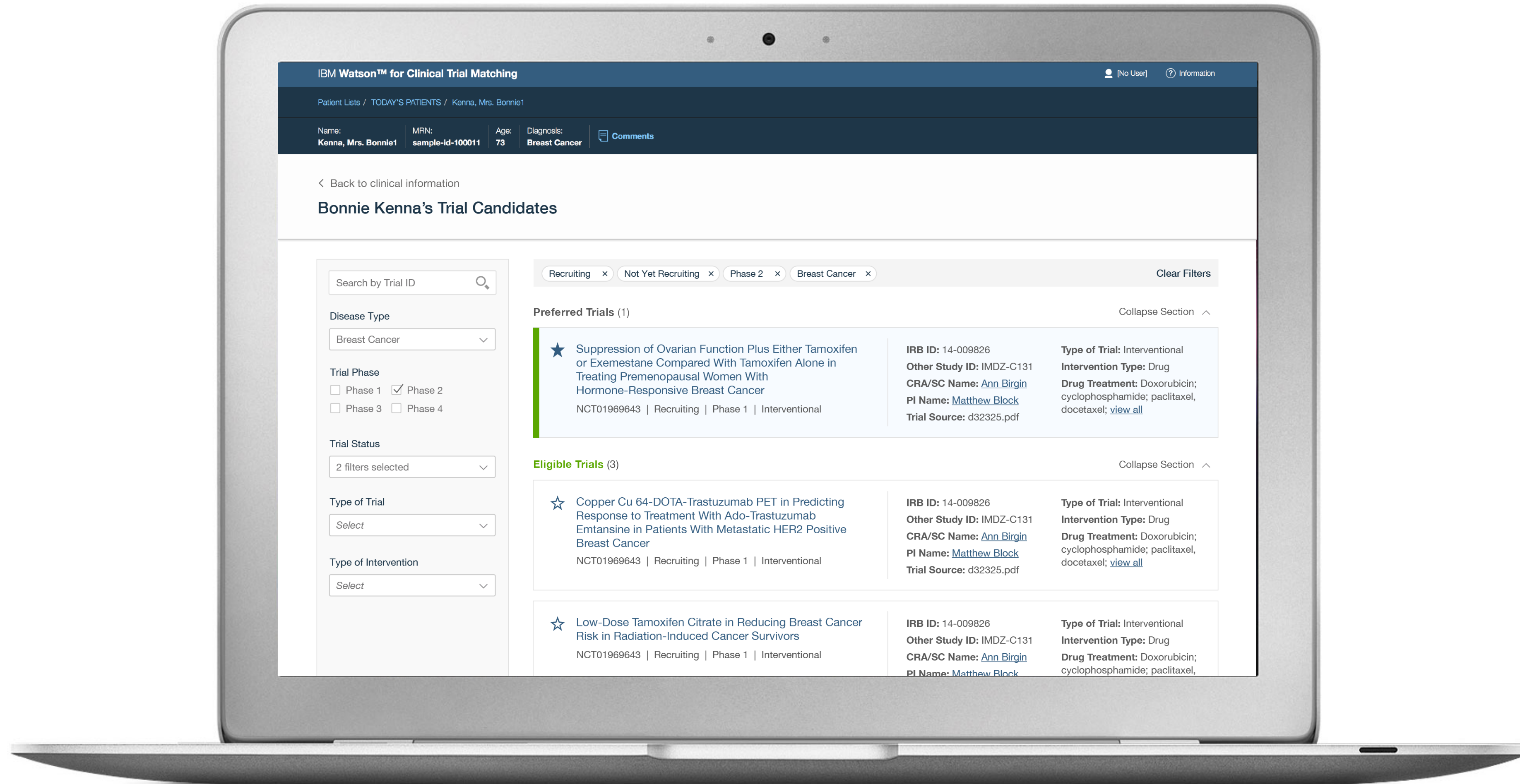
IBM Watson for Clinical Trial Matching



IBM Watson for Clinical Trial Matching



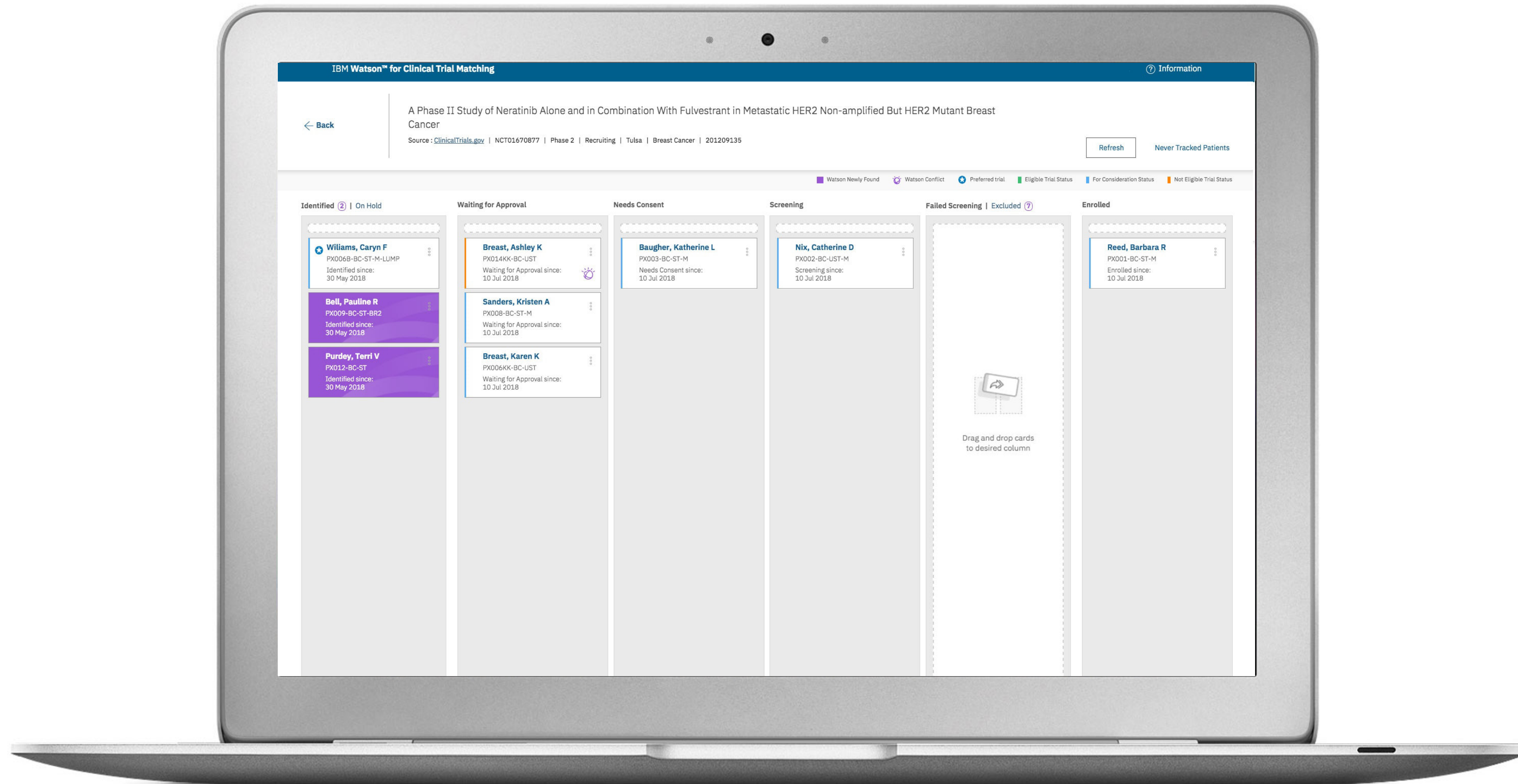
IBM Watson for Clinical Trial Matching



IBM Watson for Clinical Trial Matching

With Clinical Trial Matching, there was on average an 84% increase in enrollment to Mayo's systemic therapy clinical trials for breast cancer.

Tufia Haddad, M.D.,
Head of Breast Clinic at Mayo



Watson for Clinical Trial Matching

ROI

- 84% increase in CT enrollment (Mayo Clinic)
- Cost reduction in recruitment
- Improved trial enrollment and completion rates
- Increased CT treatment options available to patients

Digital Patient Experience

North Star Experience Vision

Experience Strategy

Discovery

Concept Design

Detail Design

Digital Patient Experience

North Star vision driving best in class patient experience focused on redefining how patients and care teams work together throughout a treatment journey.

Organization

Mayo Clinic

Role

Experience director

Team

5 designers, 4 strategy,
2 research

The experience promise of **Bold. Forward.**

Recipients

Our ambition is to support the global population.

Engagement

We want to commit to guiding all health decisions, no matter how big or small.

Tactical Deliverable

The experience needs to uniquely support people and extend beyond Mayo Clinic into the full health ecosystem.

Provide **people** access to Mayo Clinic's expertise with a **personalized, integrated care experience**, and by carefully **guiding them through any health decisions**, we can support the **breadth of care needs** for all populations, enabling **new care models** and **increasing access** to **serious and complex** care.

Strategic Deliverable

Influencing the end-to-end care experience increases the value Mayo Clinic delivers and derives.

Measurable

Ensuring our work has impact means measuring outcomes, not just engagement.

Aligned

An affirmation of Mayo Clinic's specific focus on its most valuable care abilities.

Our guiding principles

Shared principles across the consumer experience will create interactions that are definitively 'Mayo Clinic' and digital experiences that are world-class.

EXPERIENCE PRINCIPLES

Ensure Actionable Guidance

We are the global authority in medicine and every interaction should lead toward clear action and informed decisions – giving individuals a path forward that builds trust, instills confidence, and delivers hope and optimism.

No more off-ramps.

Build a Progressive Relationship

We serve people, and each interaction should encourage tangible value exchanges that help to understand not just their medical history and reality but also their personal preferences, fears, and their hopes so that we can proactively care for them as a whole person – every step of the way.

No more not being known.

Enable Seamless Continuity

We are an omni-channel system of care – across people, places, technologies, and interfaces; every interaction must pick up where they last left off (across time and channels), reflecting and acting upon all that we know of each person.

No more starting over.

Architect Unparalleled Simplicity

We solve unsolvable medical complexity, and our experience should reflect this same pursuit of excellence. We will design interactions that remove any unnecessary barriers or confusion that might stand in an individual's path to care.

No more unnecessary steps.

Demonstrate Three Shields Strength

We lead the world in medical practice, research, and education with our three shields strengthening and sustaining one another in service of the needs of the patient. We will infuse this trifecta into elegant experiences that convey the compassion and expertise Mayo Clinic delivers.

No more siloed experiences.

DESIGN PRINCIPLES

Prioritize
Inclusivity

Implement
Personalization

Exercise
Modularity

Increase
Scalability

Ensure
Reliability

Equipping Cecilia to engage in her care

JTBD

Keep track of my symptoms (and share with care team) to look for patterns

Look up unfamiliar terminology

Learn what a typical treatment path looks like

Have my options explained

Feel empowered to voice my opinion regarding care

Know areas of concern or risk when reviewing test results

Understand potential interactions with meds and conditions

Understand my post-discharge care plan

Cecilia's Needs

During chemo, Cecilia is experiencing worsening nausea. She knows this side effect is common but she's unsure the implications of it and what to do or which doctor to contact.

Sometimes Cecilia is confused by all the many specific words that relate to her care and condition. While she's familiar with the basics, she wants to really have a grasp so she feels comfortable having conversations with her care team and support network.

As she's considering moving on to another, possibly more aggressive approach to care, she wants to have a sense of what to expect and consider how that fits into her life.

During treatment at Mayo, Cecilia sees her treatment plan and wants to know what other options she has based on her clinical and personal preferences.

Knowing that her care team values her lived experiences and her priorities, e.g. starting a family, is important to Cecilia and having a way to communicate those preferences is important.

Test results connect Cecilia with what's going on inside – and seeing flags for areas of concern helps her focus her conversations with her doctors, putting her mind at ease.

The level of complexity she copes with daily can make it hard for Cecilia to feel confident she's following her care plan. Signals for important watch outs help avoid risky interactions and minimizes the need for her to ask questions of her care team.

After her surgery, Cecilia is able to see her treatment plan laid out. She can see what's already happened and what's upcoming when she's back home.

Appointment
Initial consult

Dr. Amanda Shaw, Gundersen Lutheran
Attachments (3)

My first oncologist was Dr. Shaw. I went in for an initial consult after I was having pain...

Breast cancer Consult

Great, now tell me about your visit with Dr. Shaw. I'll help fill in the details needed.

My oncologist was Dr. Amanda Shaw. I went in for an initial consult after I was having pain in my left breast. My primary physician suggested I see a specialist to check further into the pain. When I meet with Dr. Shaw, she did a checkup and had a mammogram done. It showed a lump and she had some blood drawn to run some tests.

2:11pm

You've completed your clinical care with Mayo Clinic

Your chemotherapy sessions are scheduled at Gundersen Lutheran MC. [Link accounts](#)

You've shared your note with care team

Pregnancy planning concern
I see a warning to discuss how these...

Article shared by Mayo Assistant: [Fertility preservation: Understand your options...](#)

Go to note

Me 1:23 PM

You're now connected with Jane

Hi Cecilia, my name is Jane, a nurse navigator. Thank you for sharing your note with us. I can discuss this with your care team and provide feedback either before or at your next appointment.

Jane Tamarl, R.N. 1:22 PM

Methotrexate (Trexall)
Immunosuppressive medication

Dr. Shaw M.D.
Prescribed on Dec 15, 2022

Dosage	Duration	Start
2.5 Mg	12 weeks	08/8/22

Comments
Take 1 tablet once a week by mouth

Warning
Do not take aspirin with ibuprofen or naproxen without talking to a doctor.

- Take with a meal
- Do not take with aspirin

Risks & side effects

- dizziness

Drug details

Create note Ask Mayo Assistant

Pregnancy: Consult a doctor

Alcohol: No known interactions with light ...

Drug class: Antimetabolite antineoplastic agent

Treatment plan
DCIS | Left Breast | Stage 1, HER2-positive

Review your insurance coverage

Share this content

Plan summary
Treatment course: 2-3 months

Care preferences
You have elected not to have breast reconstruction surgery. Please consult your doctor about your treatment plan.
[Contact care team](#)

Mastectomy
2 hrs | Surgical procedure
The first treatment will be surgical procedure to remove all breast tissue from a breast as a way to treat your breast cancer.
[Learn more](#)

Recovery
It takes up to 6-8 weeks to recover.
[Learn more](#)

Chemotherapy
7 weeks, 3 days/wk | 5-FU, Ellence
After recovering from your mastectomy surgery, you'll be going through chemo therapy for 8 weeks, 4 days per week. Using 5FU, Ellence.
[Learn more](#)

I'd like to talk about how the suggested treatment plan will affect my pregnancy planning and breastfeeding. Is there an alternative procedure if I don't want to have surgery? In addition, I am aware that I have exhausted my out-of-pocket insurance budget this year due to previous treatments at my local hospital. Do you have any resources I can use?

Aug 08, 2022 11:56 AM

Generated topics (added to agenda)
Insurance • Pregnancy • Treatment plan • Family planning

Based on your comments, we can provide some relevant information.
• Insurance: [Explore insurance Q&A](#)

Demonstrating partnership in care

JTBD

Understand if I should seek advanced care

Know my care teams will work together

Feel like doctors can look at me holistically

Get answers to questions about my records

Check-ins to see how I'm doing

Digitally ask routine health questions to my care team

Know who to ask when I have questions

Cecilia's Needs

Cecilia cancer has progressed. Her local provider has suggested she seek care elsewhere, but she wants to understand more about why and if Mayo Clinic is a fit.

As she is raising questions about her treatment plan, she is supported by a breadth of care providers. She sees when information is shared between them and can follow along.

Cecilia is eager to start a family. She reviews her treatment plan and shares her concerns. Her team understands the importance of this and works to adjust her plan to support her goal.

When reviewing test results and appointment summaries, Cecilia appreciates being able to annotate the reports to get answers to questions or clarify her understanding.

Knowing that Mayo Clinic cares about how she's feeling, even when she is transitioning between care experiences, helps her feel connected.

When she's reviewing her upcoming mastectomy procedure, she is curious about the difference between that and a lumpectomy and is able to ask easily and get a quick response.

As she is preparing for surgery, questions arise. She's able to see her whole care team and message them directly or send a question to the group, knowing it will be routed appropriately.

I'd like to talk about how the suggested treatment plan will affect my pregnancy planning and breastfeeding. Is there an alternative procedure if I don't want to have surgery? In addition, I am aware that I have exhausted my out-of-pocket insurance budget this year due to previous treatments at my local hospital. Do you have any resources I can use?

Aug 08, 2022 11:56 AM

Generated topics (added to agenda)

Insurance • Pregnancy • Treatment plan • Family planning

Based on your comments, we can provide some relevant information.

- Insurance: [Explore insurance Q&A](#)

Nausea (mild)

Dec 15, 2022
Reported by Amanda Shaw, M.D.
Provided by Gundersen Lutheran MC

Symptoms

Dec 15, 2022, 11:30 AM

Reported by Amanda Shaw, M.D.
Shared with Mayo Clinic

Symptom progression (newest to oldest)

- Mild nausea**
Dec 4, 2022
Dr. Shaw reported that patient is experiencing mild nausea after third Chemotherapy session. Dr. Shaw and Dr. Haddad will continue to monitor patient's current symptom.
[Get details](#)

Great, now tell me about your visit with Dr. Shaw. I'll help fill in the details needed.

My oncologist was Dr. Amanda Shaw. I went in for an initial consult after I was having pain in my left breast. My primary physician suggested I see a specialist to check further into the pain. When I meet with Dr. Shaw, she did a checkup and had a mammogram done. It showed a lump and she had some blood drawn to run some tests.

2:11pm

Treatment plan

DCIS | Left Breast | Stage 1, HER2-positive

[Review your insurance coverage](#)

Share this content

Plan summary

Treatment course: 2-3 months

- Care preferences**
You have elected not to have breast reconstruction surgery. Please consult your doctor about your treatment plan.
[Contact care team](#)
- Mastectomy**
2 hrs | Surgical procedure
The first treatment will be surgical procedure to remove all breast tissue from a breast as a way to treat your breast cancer.
[Learn more](#)

Let us know how you're feeling.

Take a short survey to help us support you where it counts. Takes 5 min to complete.

[Get started](#)

Tufia C. Haddad M.D.
Medical Oncologist
[Send a secure message](#)

Tina J. Hieken M.D.
Surgical Oncologist
[Send a secure message](#)

Hi, I'm Mayo Assistant.
I'm here to answer your questions

What's your name?
Cecilia

Nice to meet you Cecilia. It looks like you are looking for **breast cancer progression symptoms** information, add any topics to narrow down what you are looking for.

Add Treatment options
Side effects Medications

Cerimides, P

Cerimide score: 11

Create note Ask Mayo Assistant

Higher risk. Studies have shown an absolute 5-year risk for adverse cardiovascular ...
[Show details](#)

Cerimides (18:0)	Reference Value
0.16 mcmol/L	0.05-0.14

High

Connecting to the right support at the right time

JTBD

Learn how to recognize the signs of mental health decline

Connect to support and resources that are right for what I need

Learn about supportive care services

Get support for post-treatment plans

Get support for post-treatment lifestyle adjustments

Cecilia's Needs

Cecilia is aware that the experience of cancer can impact how she's thinking and feeling. She appreciates seeing relevant information that reflects what she's going through and gives her concrete tips on actions she can take.

As she provides her health history and shares additional questions, the platform detects areas of need and points her to resources that can address them.

As Cecilia begins to consider whether Mayo Clinic is a fit for her care, she explores the website and sees recommendations for services and information personalized to her needs.

Even after she's left the care of Mayo Clinic, Cecilia is still able to take advantage of Mayo's content and supportive services that help her stay on track with her care that's happening locally.

As she continues through chemo, she experiences fatigue – a normal side effect. She sees content as well as the ability to connect a device to track her sleep and get actionable tips.

Could you tell me the dates for this visit and which hospital Dr. Shaw is affiliated with?

My initial visit was around the first week of July, 2020. And Dr. Shaw was with Gundersen Lutheran in La Crosse, Wisconsin.
3:30pm

Can you share documents from your mammogram or blood tests?

Share documents
Upload any relevant documents from your doctor visit to share with the care team.

Upload

Take a photo

[Link external accounts](#)

Treatment plan
DCIS | Left Breast | Stage 1, HER2-positive

Gundersen Lutheran MC: Chemotherapy

18 of 32 sessions

Note from your care team
Dr. Shaw has reached out to Dr. Haddad to discuss your recurrent side effects.

Symptom tracker

Nausea (severe)
Dec 30, 2022
Reported by Amanda Shaw, M.D.

Hi, Cecilia

Included are relevant articles and services. If you need more specific support, [setup a free account](#) to access more personalized content and tools or [request a consult](#) for clinical care.

Breast cancer progression symptoms

Topics: Side effects, Medications
Moderate Pain • Severely tired • Often Nauseous • Mildly depressed

Fatigue
Explore self-help tips to fight tiredness
5 min read



Breast Clinic

At the Mayo Clinic Breast Clinic, you'll find a caring, multidisciplinary team of experts to help you with all breast-related concerns, including the most complex and rare forms of breast ...

[Explore more](#)

Surgical - Risks & side effects

The types and severity of side effects vary from person to person based on several factors. Before you agree to have any surgery, your Mayo care team will tell you about the risks and ...

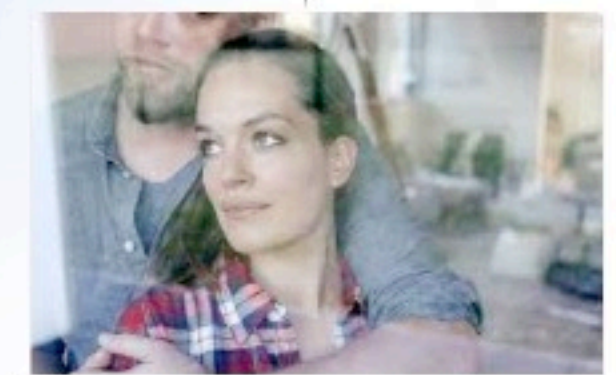
[Explore more](#)

Monitor your sleep at home

Sleep monitor helps you track and record sleep cycle details and can help improve your sleep patterns.

Sync

Today's recommendation
While you're receiving your Chemotherapy, take a moment to relax



Chemo brain (Diagnosis & Treatment)

A professional who specializes in diagnosing and treating conditions that affect memory and thinking (neuropsychologist) can creat...

Mindfulness-based intervention in...
Clinical Trial

Cancer education: Nutrition & cancer
Blog

[Discover more](#)

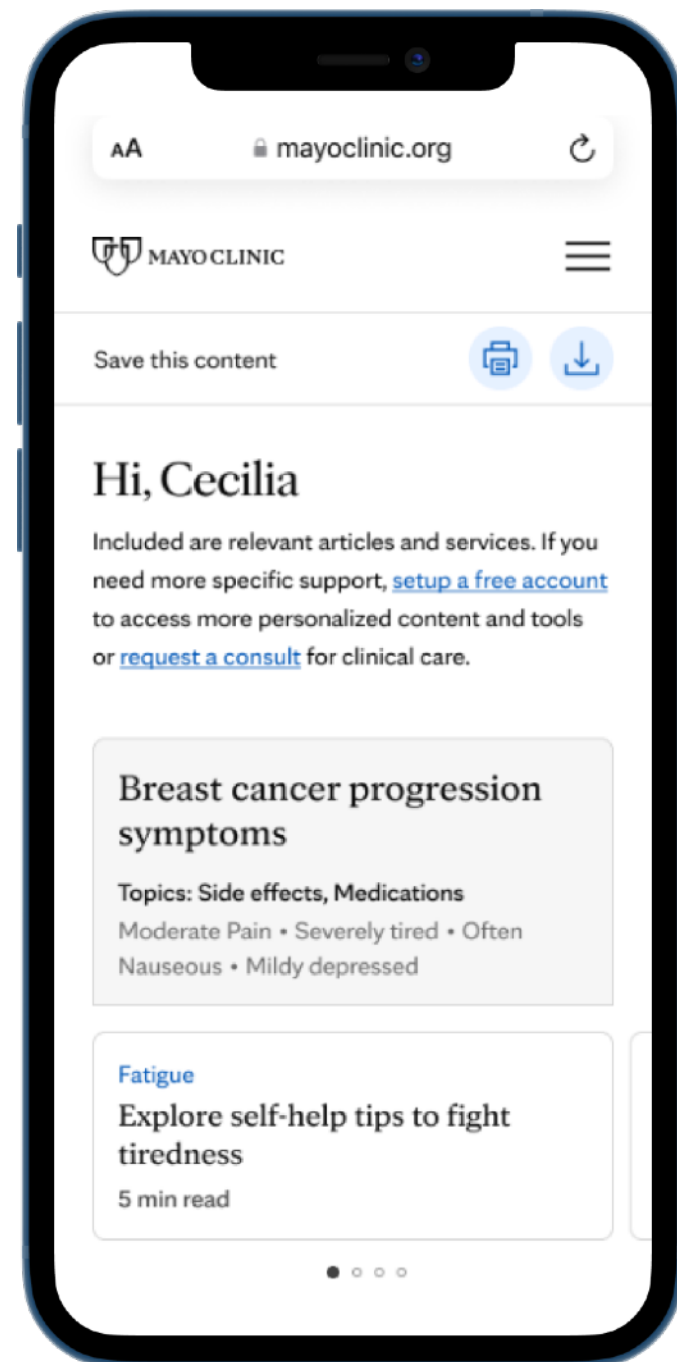
Managing stress in difficult times
8 min read

Keeping track of your side effects
5 min read

Fatigue fighter tool - ongoing support
5 min read

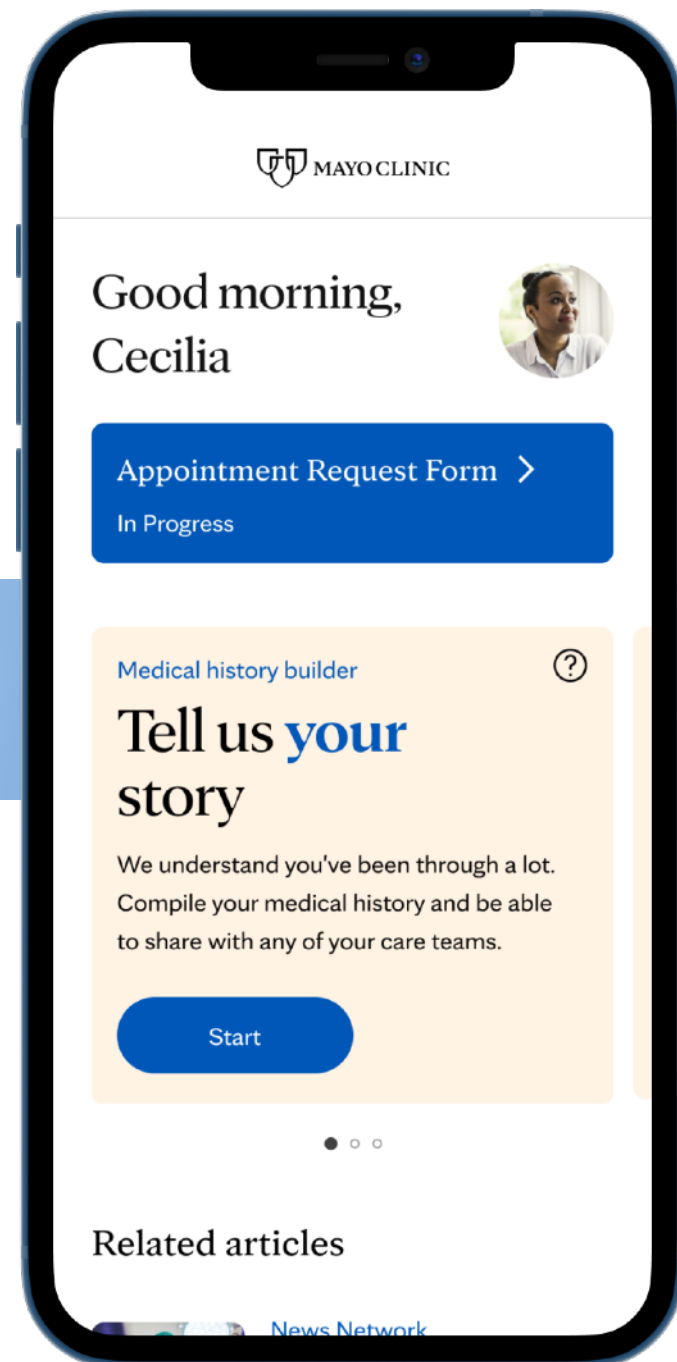
Experience prototypes

Mental health & supportive care



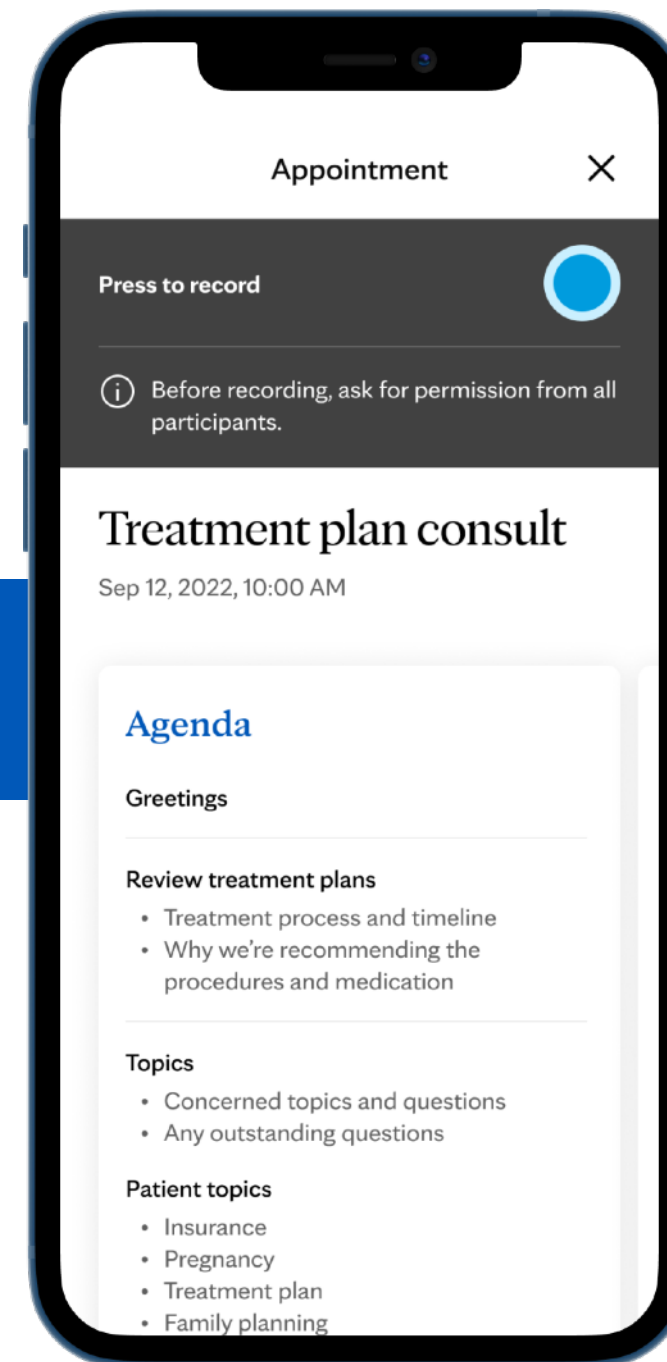
Unauthenticated

Relationship initiation



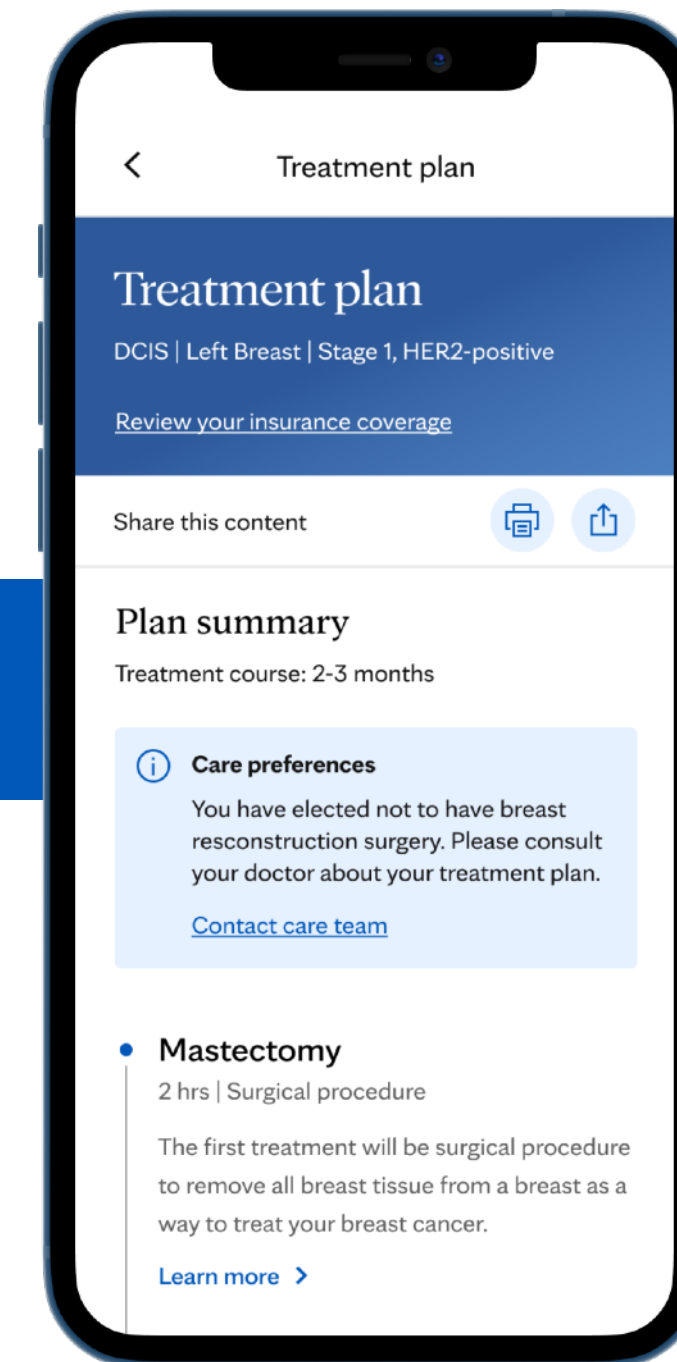
Authenticated non-patient

Having conversations



Authenticated patient

Care plan & post-Mayo connection



Authenticated patient & non-patient

Digital Patient Experience

ROI

- Improved patient engagement and retention
- Better clinical outcomes through enhanced adherence
- Reduction in administrative costs and improve patient scheduling efficiency
- Expanded access to care
- Improved coms and collaboration among care teams
- Expanded access to patient data for research and innovation
- Enhanced post-care monitoring and recovery (treatment outcomes for improved continuum of care)

SoMiBo Companion App Experience

Mobile Experience

Experience Strategy

Discovery

Concept Design

Detail Design



SoMiBo Companion App Experience

MVP companion app combining a personalized wellness program supported by behavioral science with SoMiBo's sleep and healthcare supplements.

Organization

Vectura

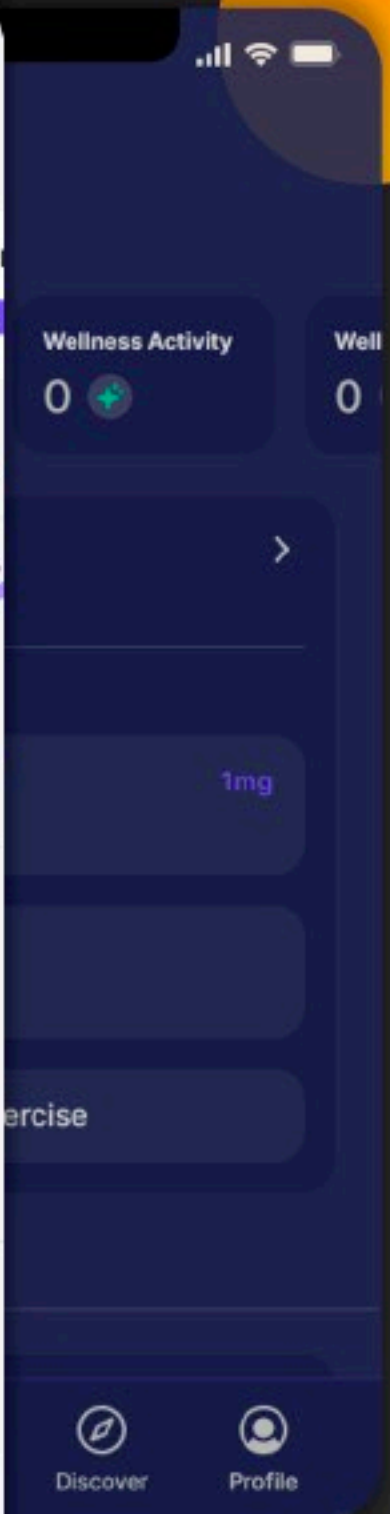
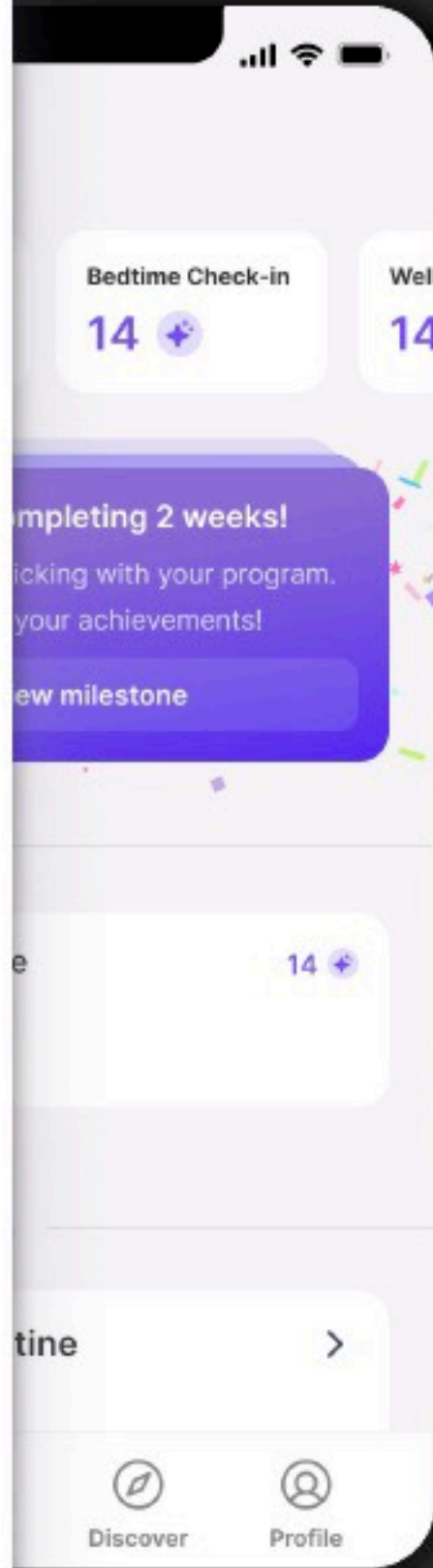
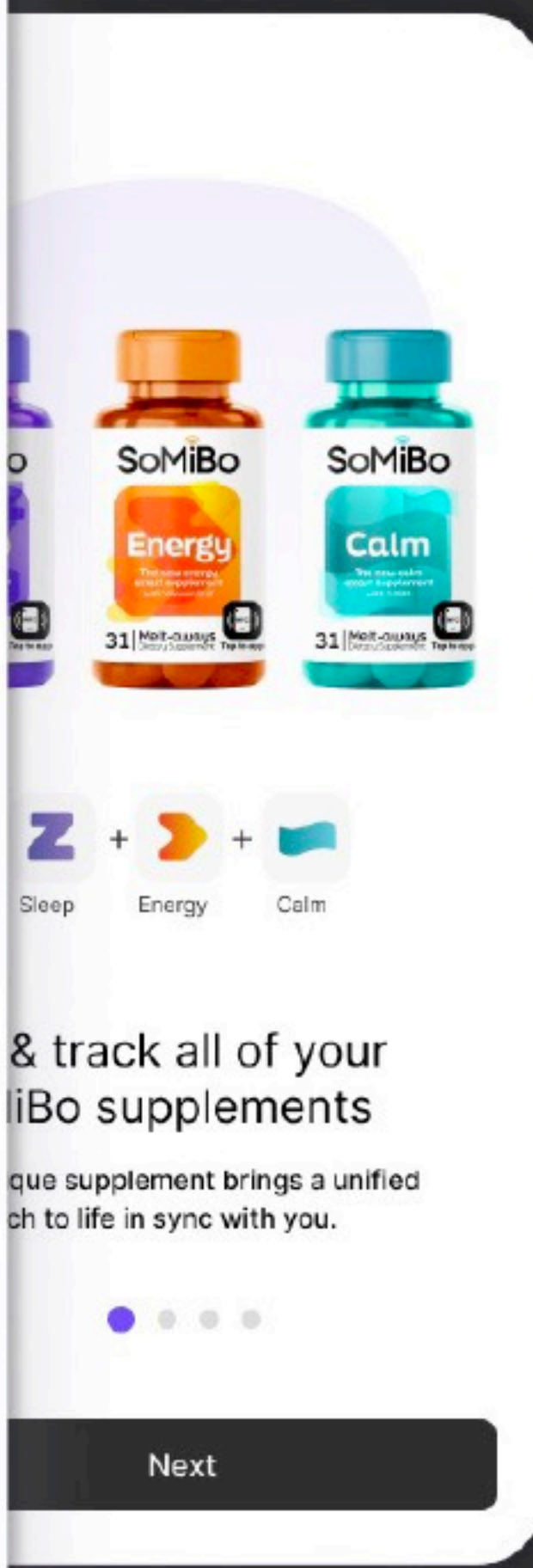
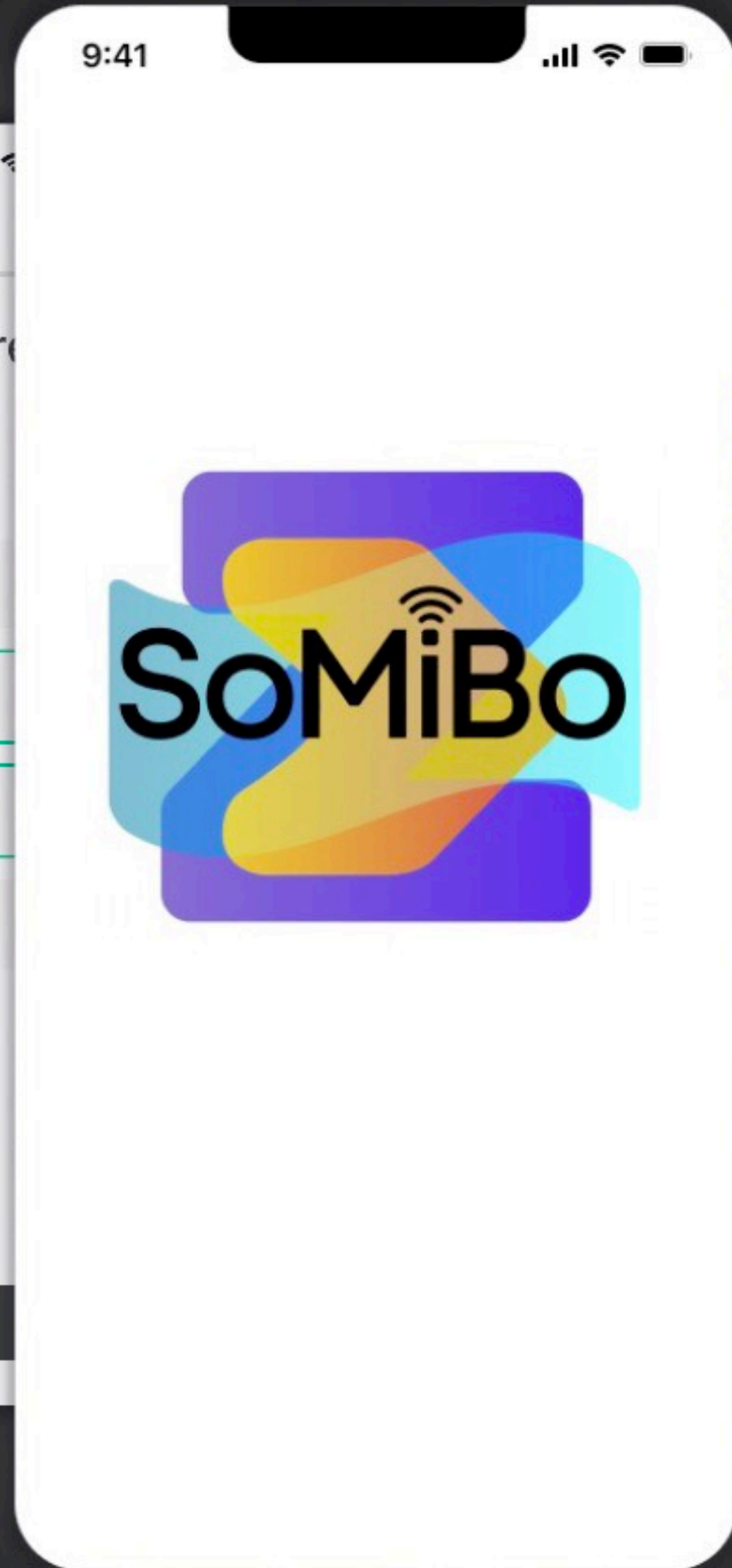
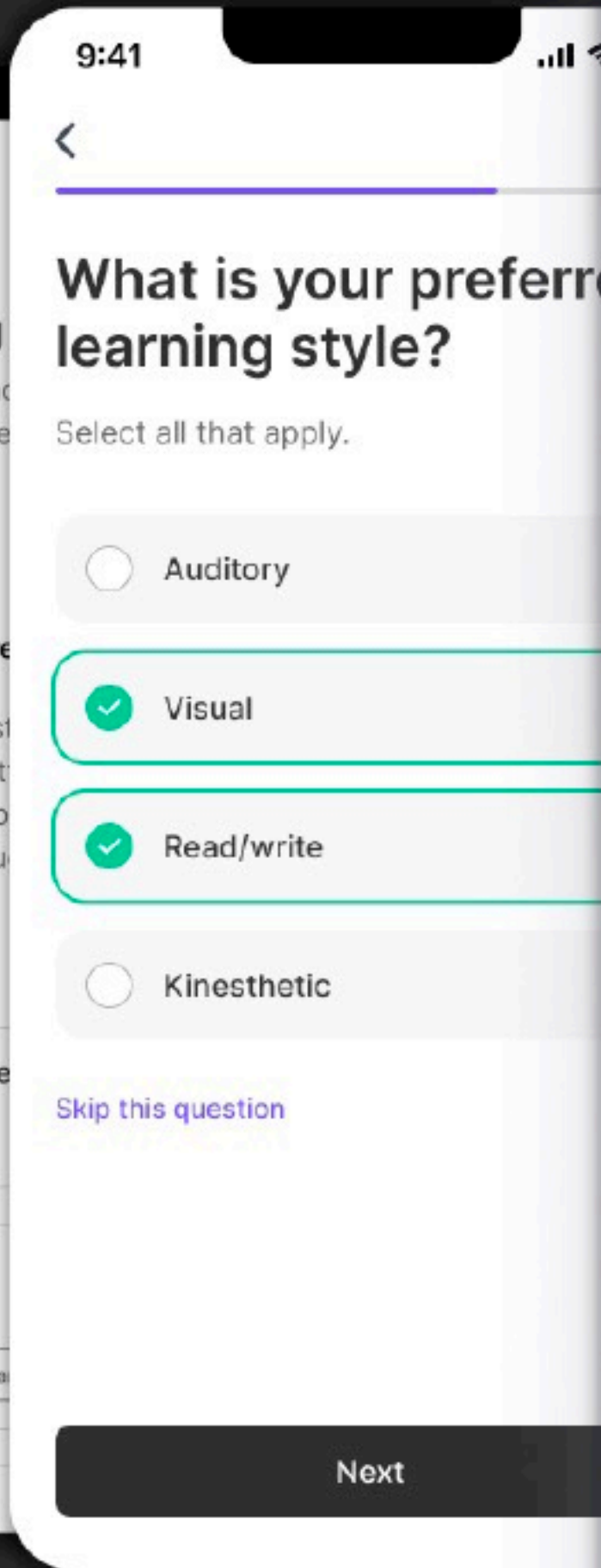
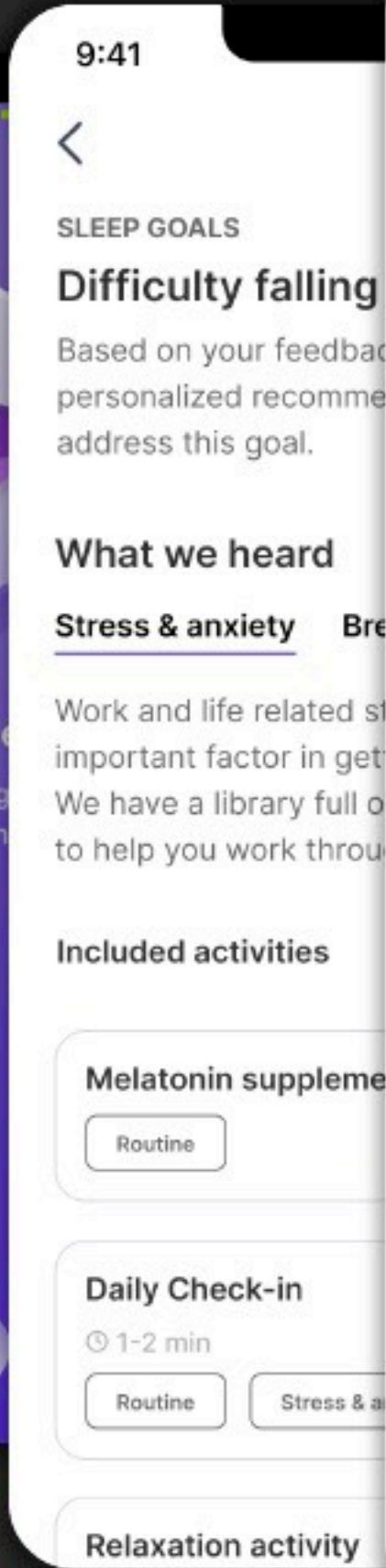
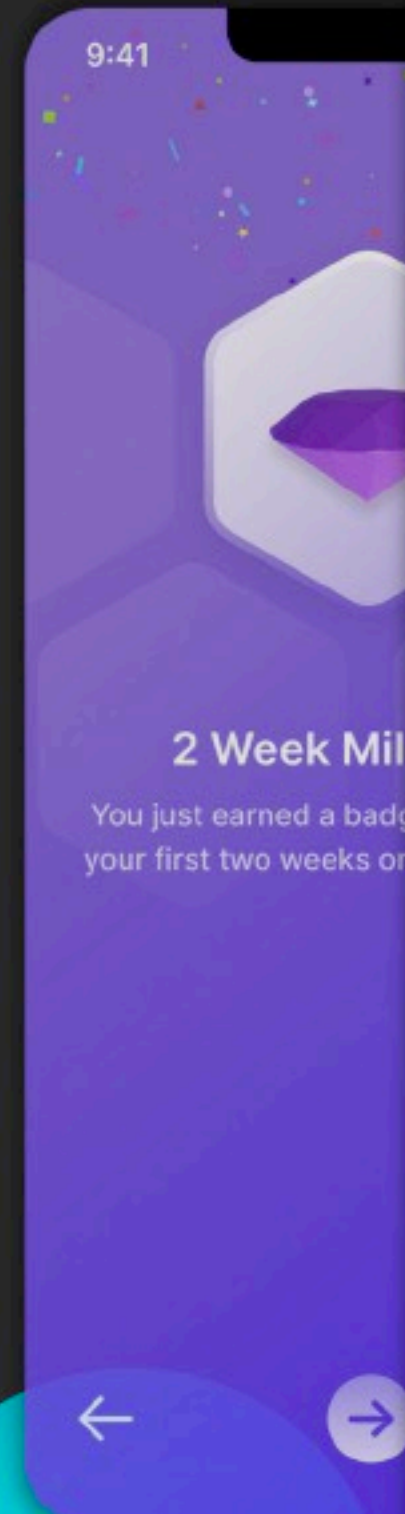
Role

Experience director

Team

4 designers, 1 content, 3 strategy, 1 research

Welcome to the SoMiBo App



Digital Companion Differentiated Value Proposition

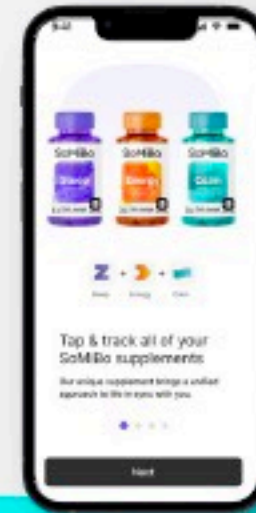


The SoMiBo app helps people turn daily behaviors into lifelong habits through custom wellness programs, data-backed sleep activities and personalized virtual coaching combined with fast-acting supplements.

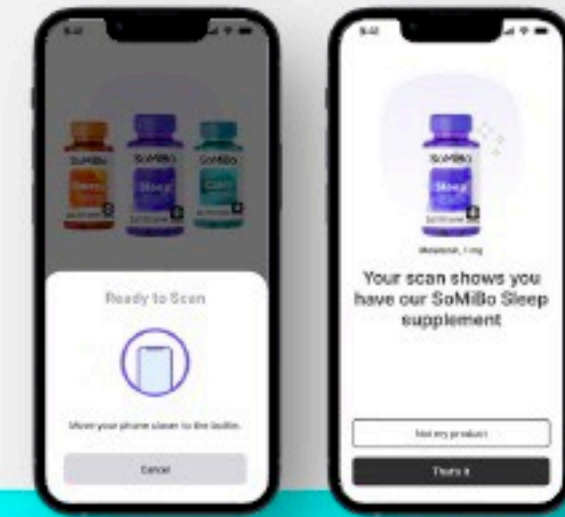
End To End App User Journey



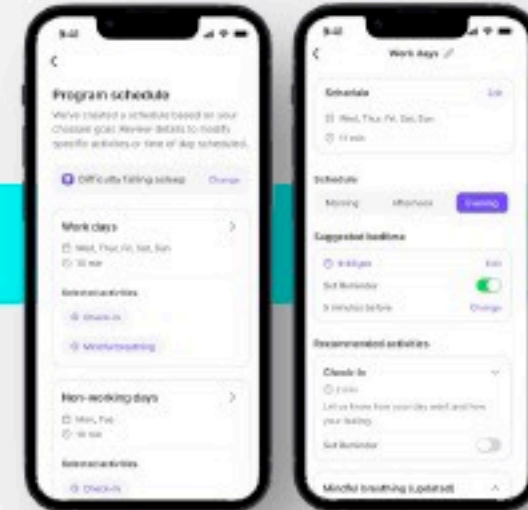
Logan



Scan QR, download app, get oriented, answer basic Qs

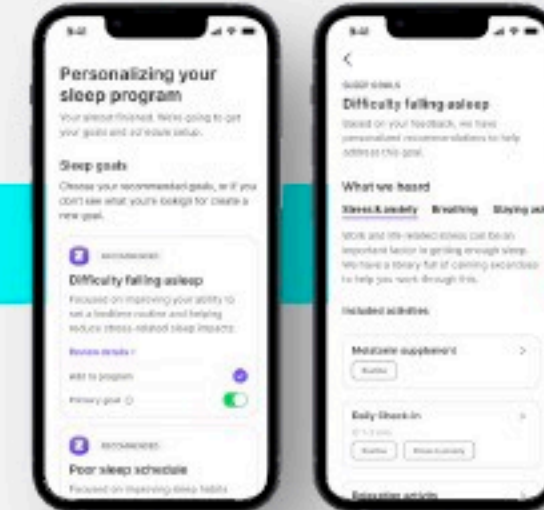


App Entry & Onboarding



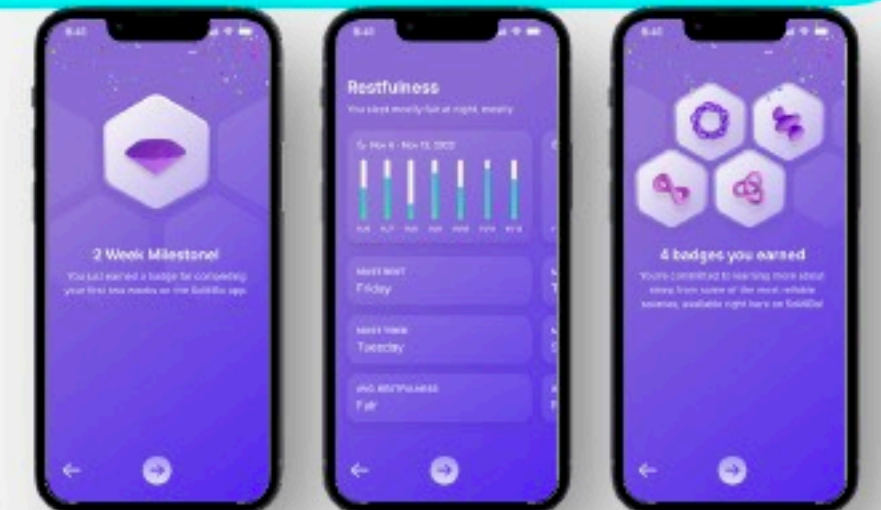
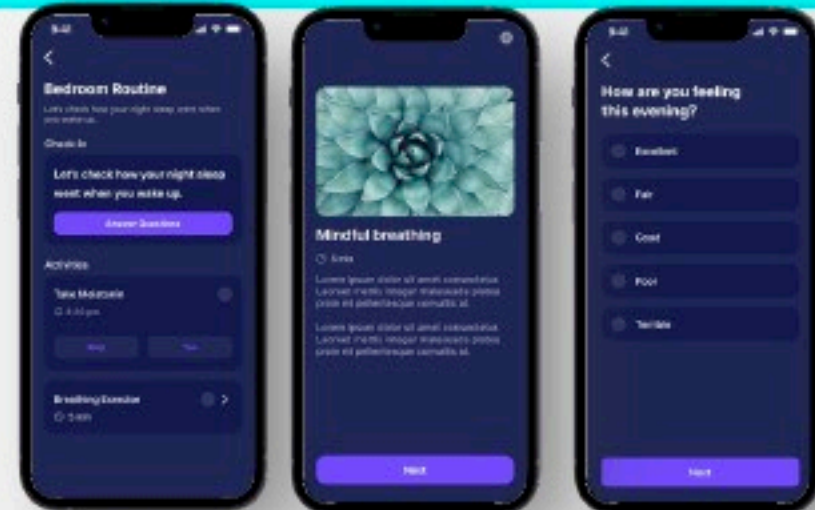
Program Creation

Bring in sleep and behavioral science, set goals, see recs, refine sleep program



Program Engagement, Continuous Refinement, & 2-Week Milestone

Engage in sleep strategies/BCTs, motivated by outcomes, engage with product, refine program, 2-week in review



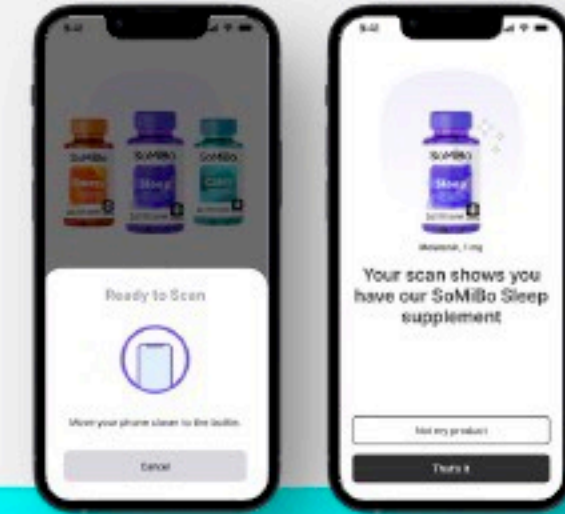
End To End App User Journey



Sam



Scan QR, download app, get oriented, answer basic Qs

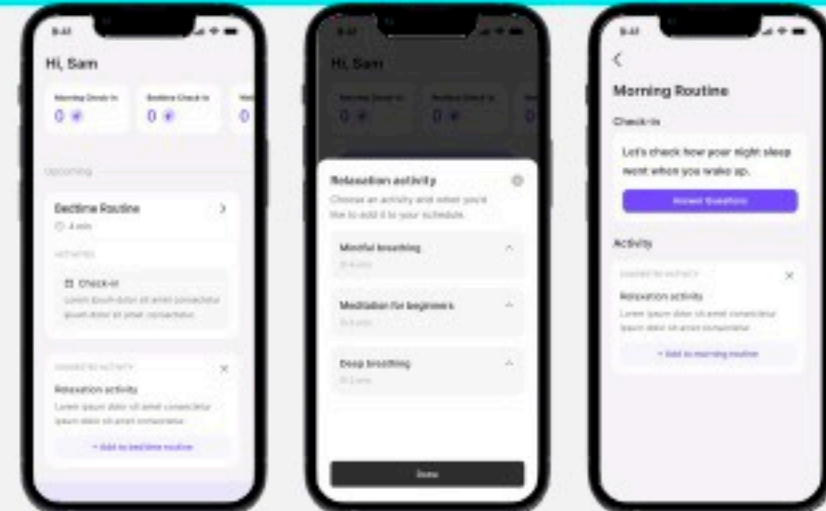


App Entry & Onboarding

Skips Program Creation

User does not complete program onboarding and explores the app instead

App Engagement, Continuous Refinement & Exploration, & 2-Week Milestone

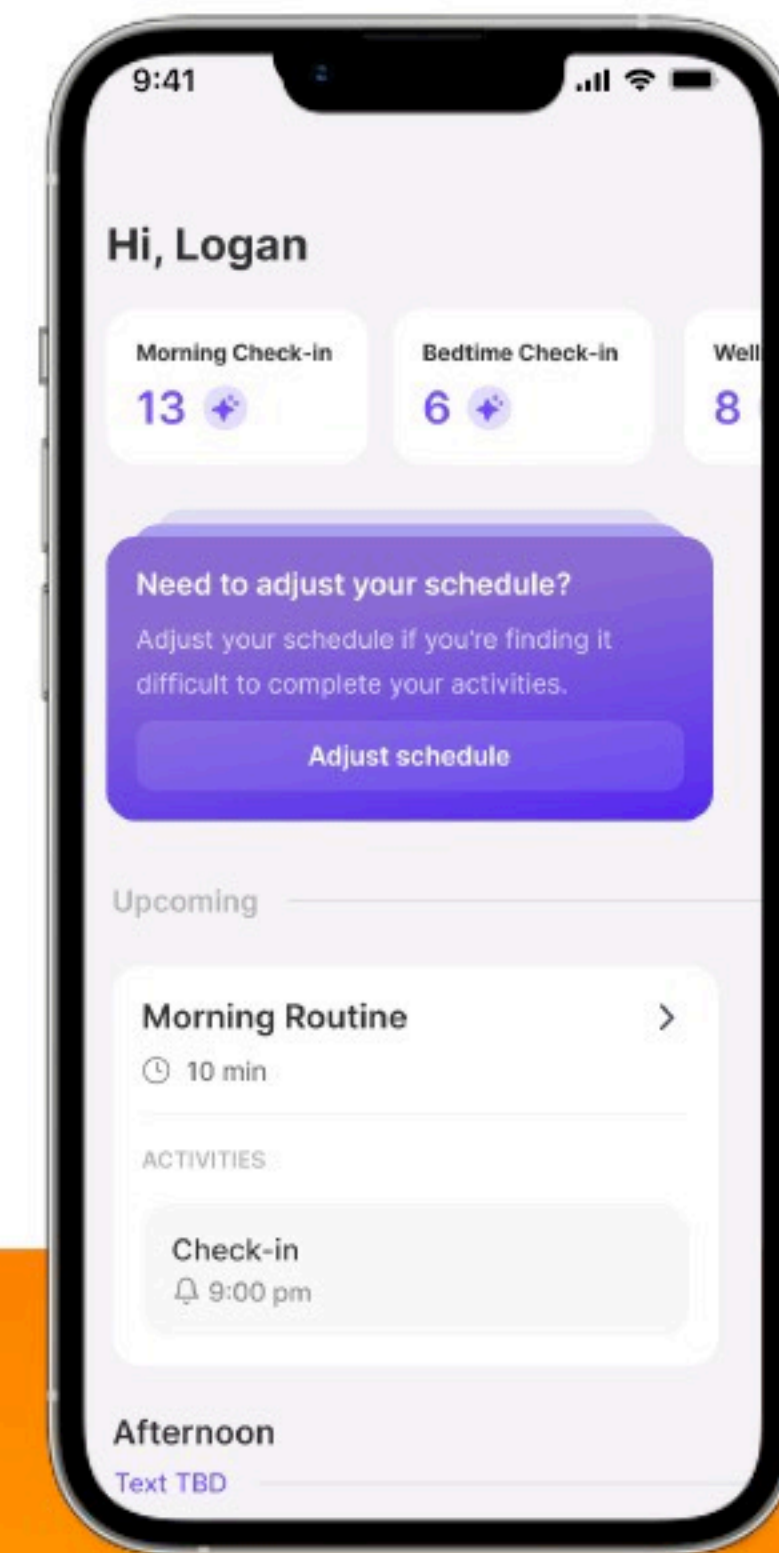
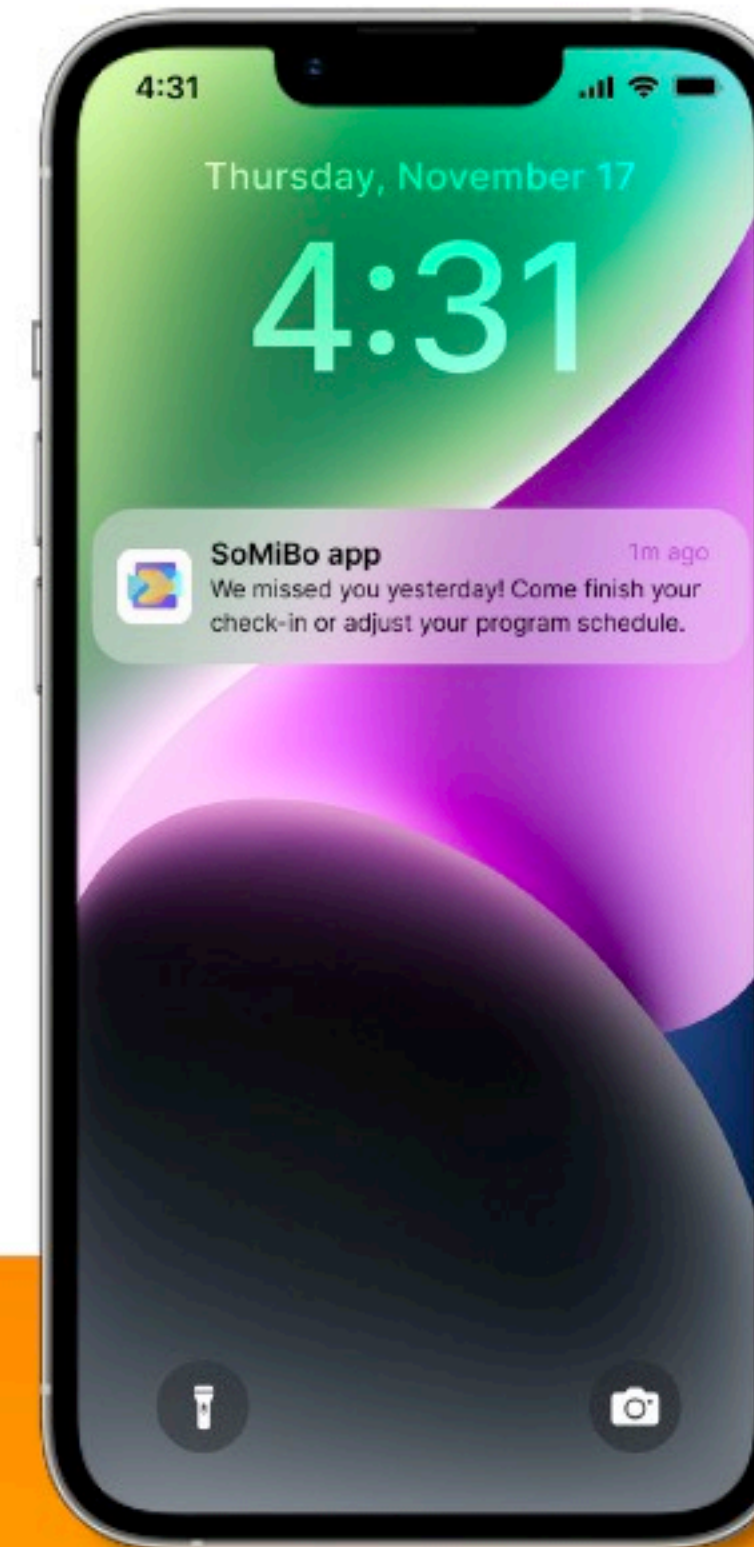
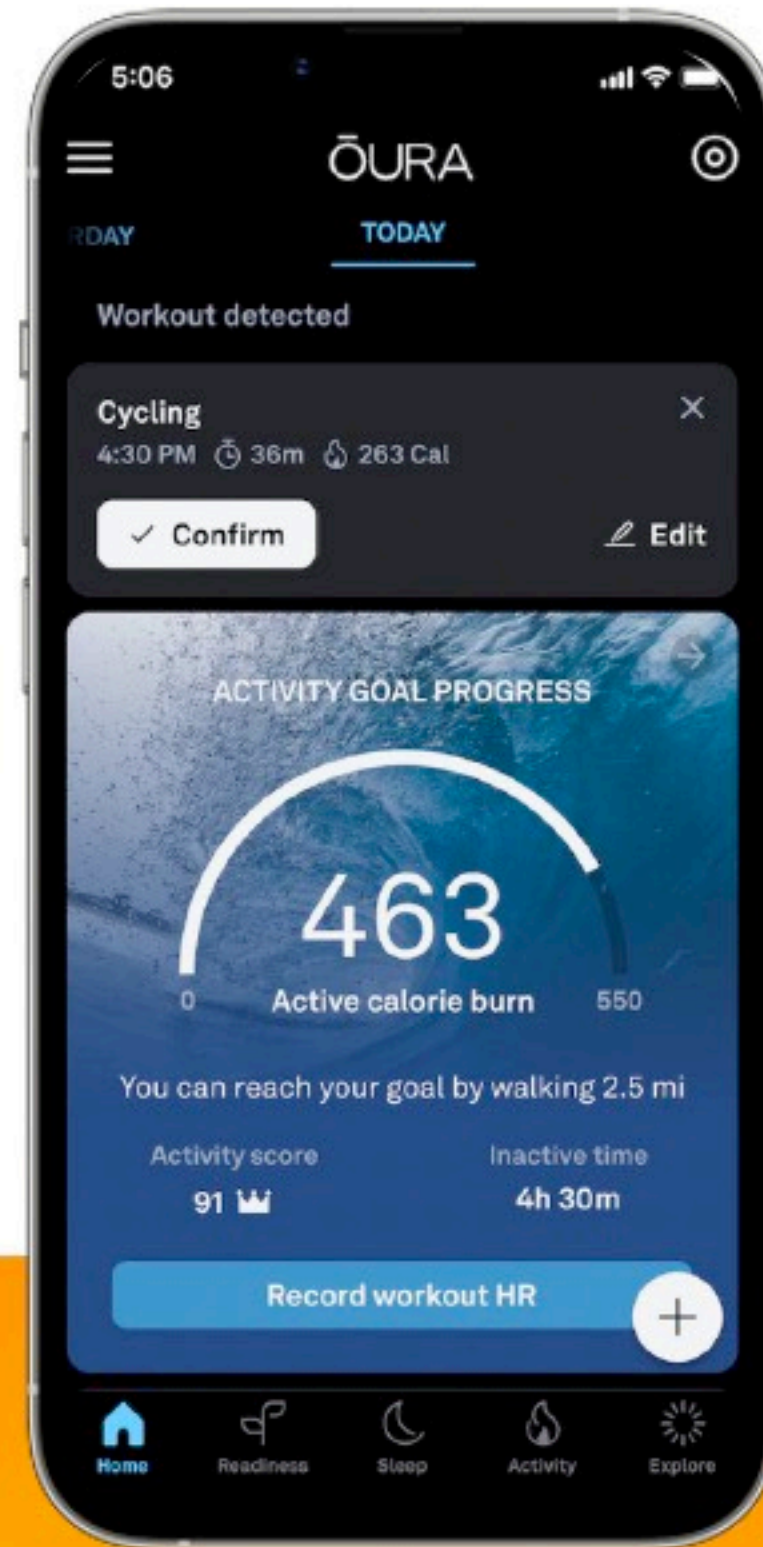
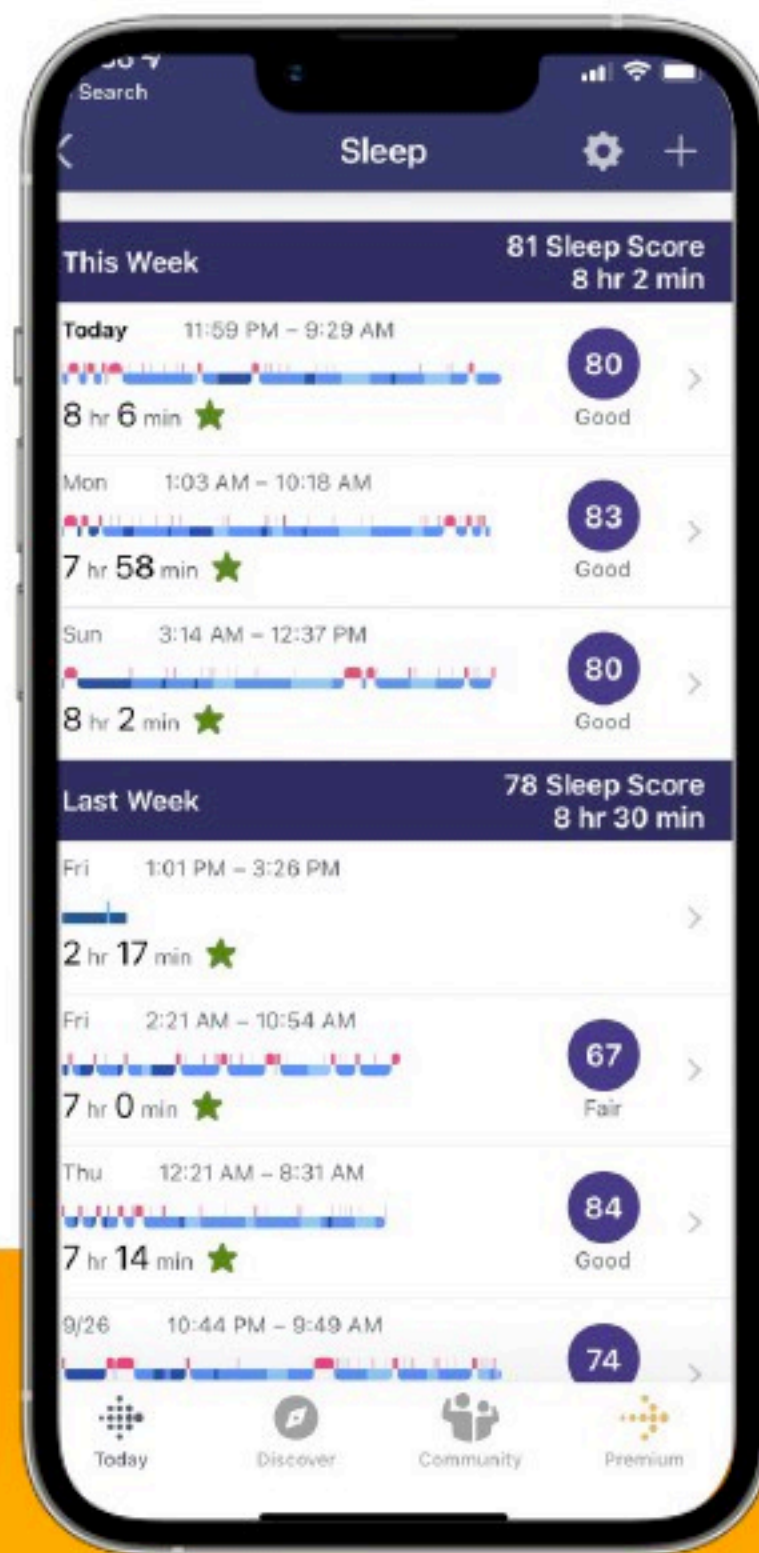


Engage in sleep strategies/BCTs, motivated by outcomes, engage with product, refine program, 2-week in review



Other tracking apps just give you data.

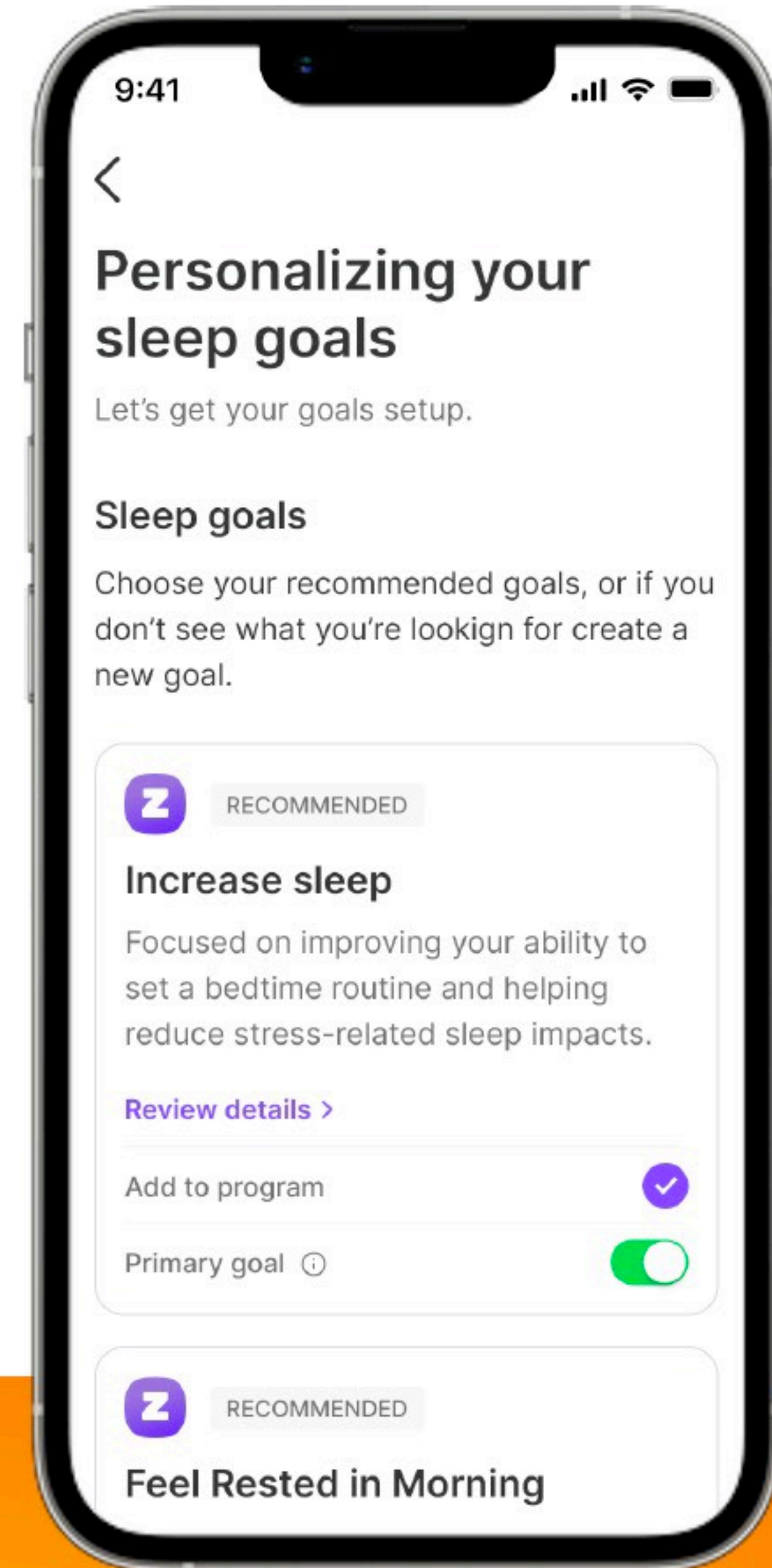
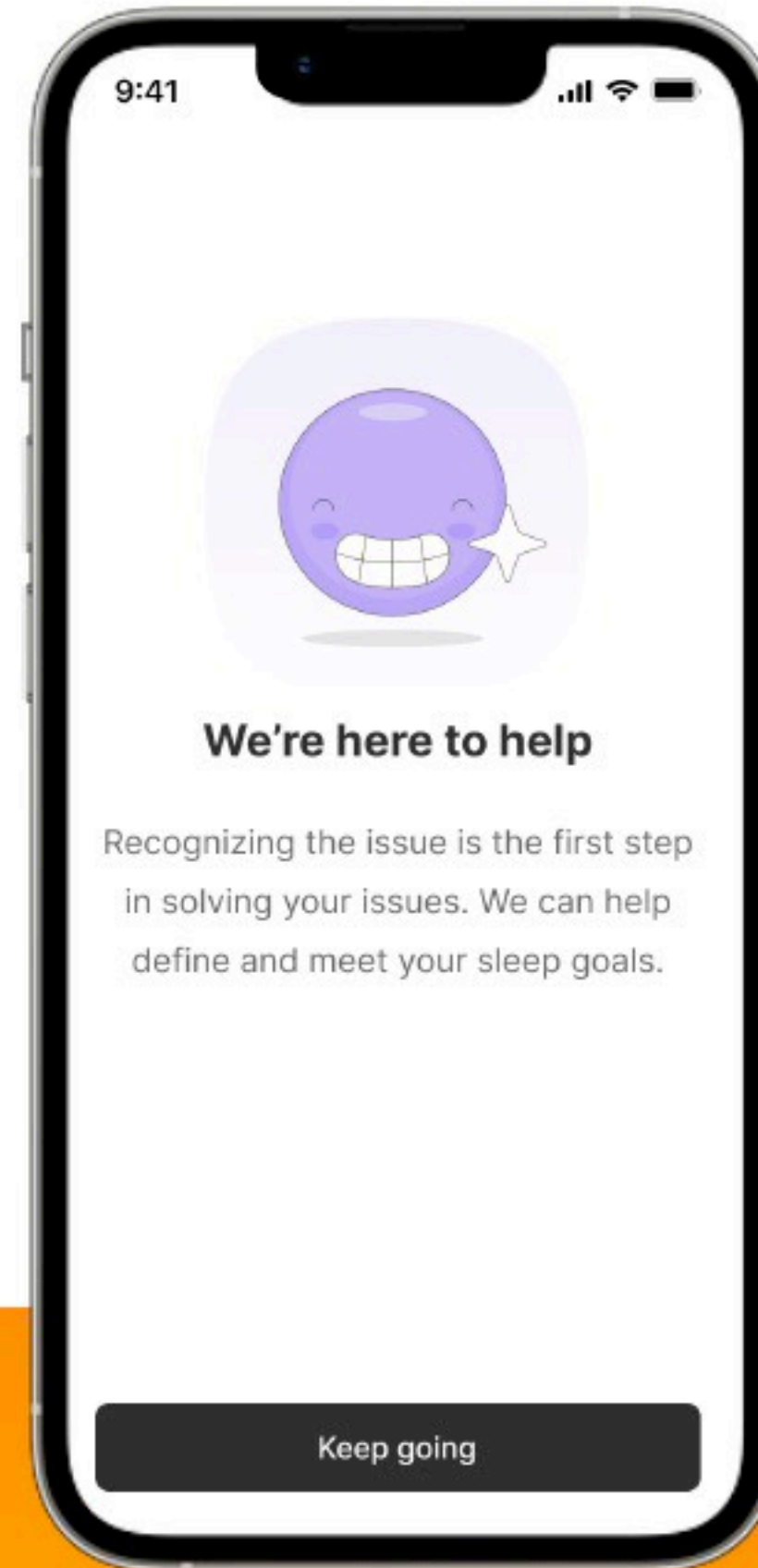
SoMiBo turns data into meaningful guidance presented as an empathetic digital coach



Digital coaching throughout onboarding

Prior to engaging with the core app experience, users receive early guidance based on the data they provide throughout onboarding.

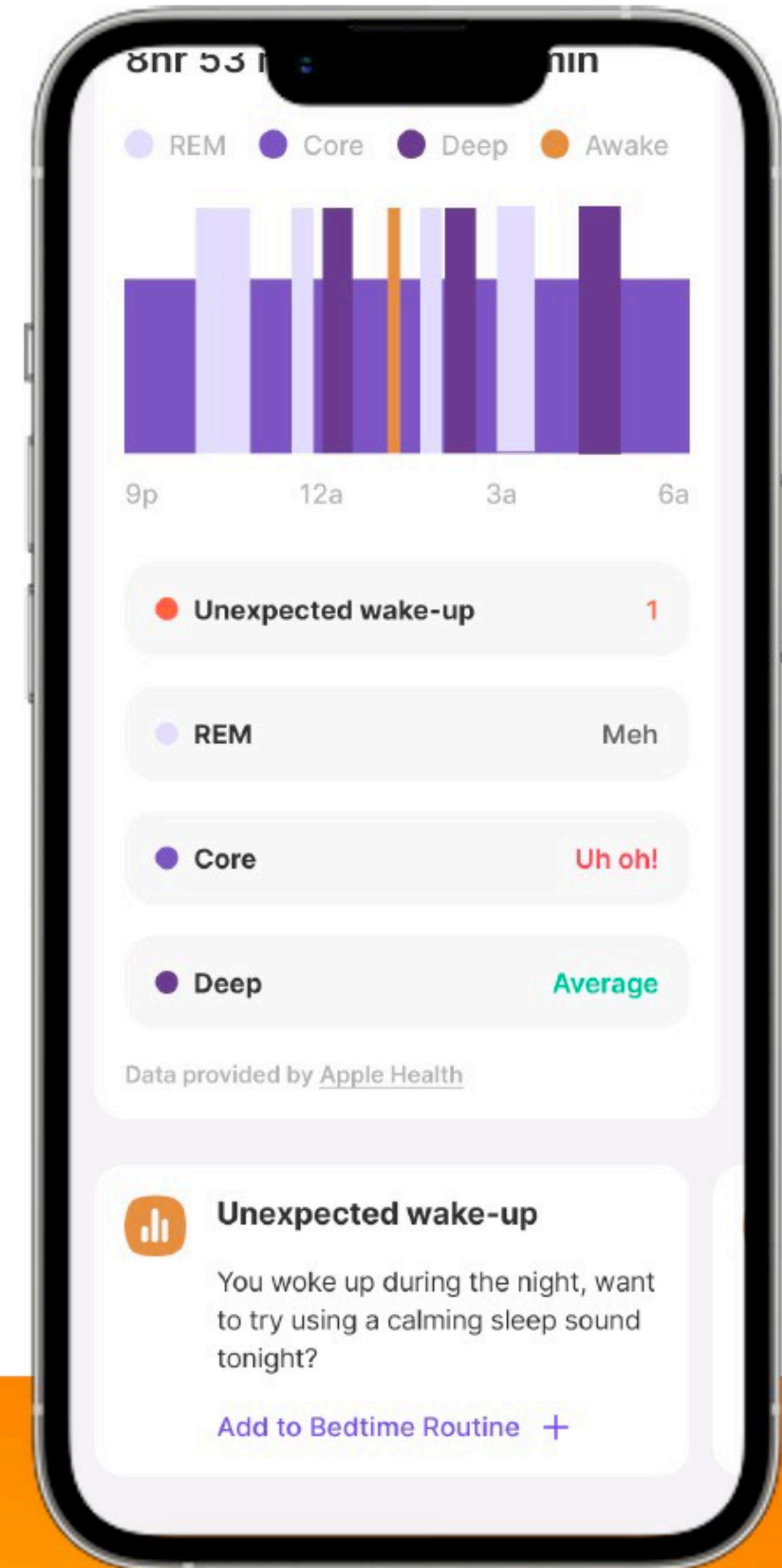
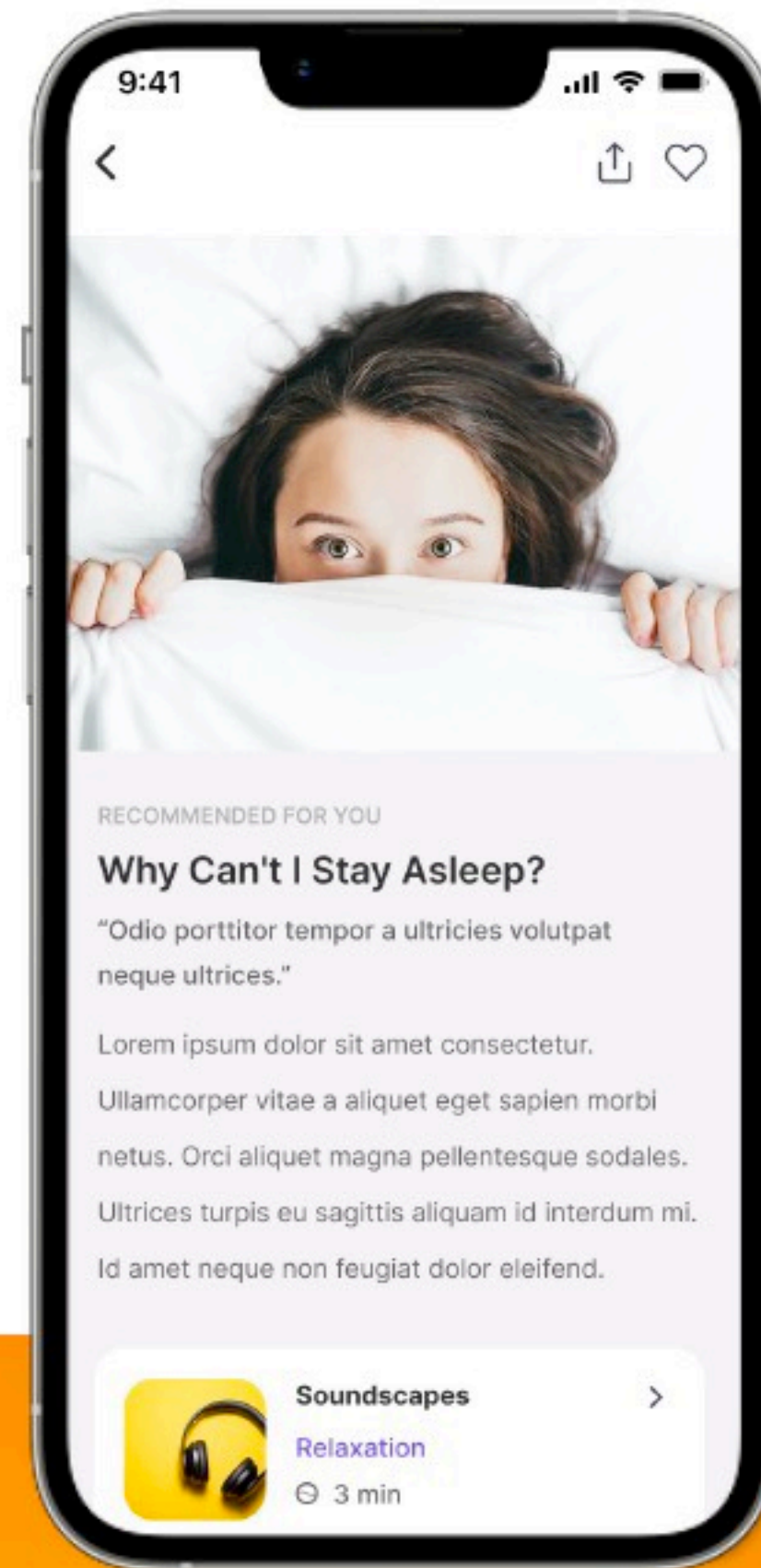
- Encouraging educational tips after key questions in profile building
- Guidance through goal-setting activity that reflects user's unique results from onboarding questionnaire



Action-oriented guidance embedded alongside data

Data is always presented for a clear purpose: celebration and encouragement or motivation to a specific action that addresses related issues.

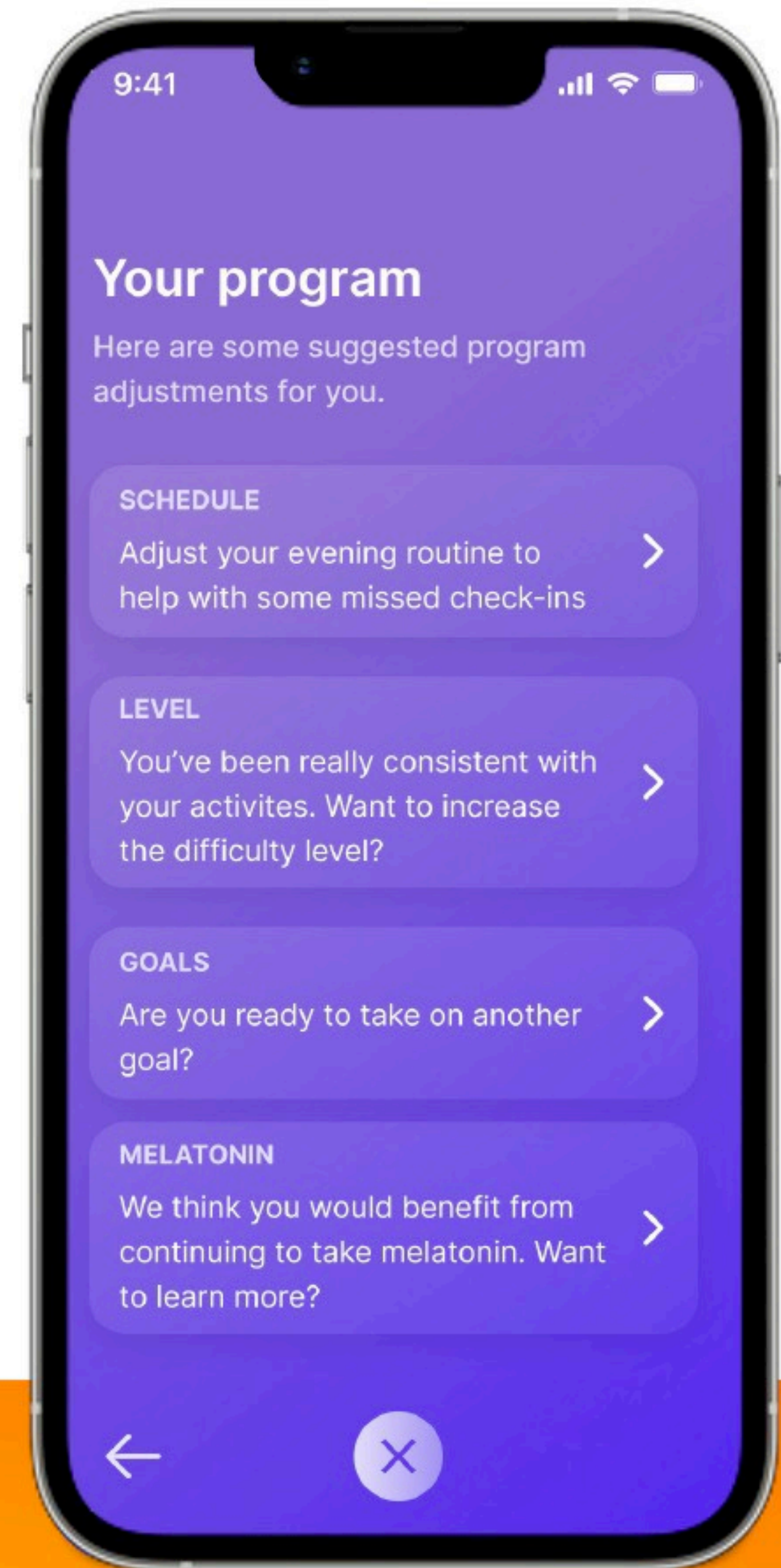
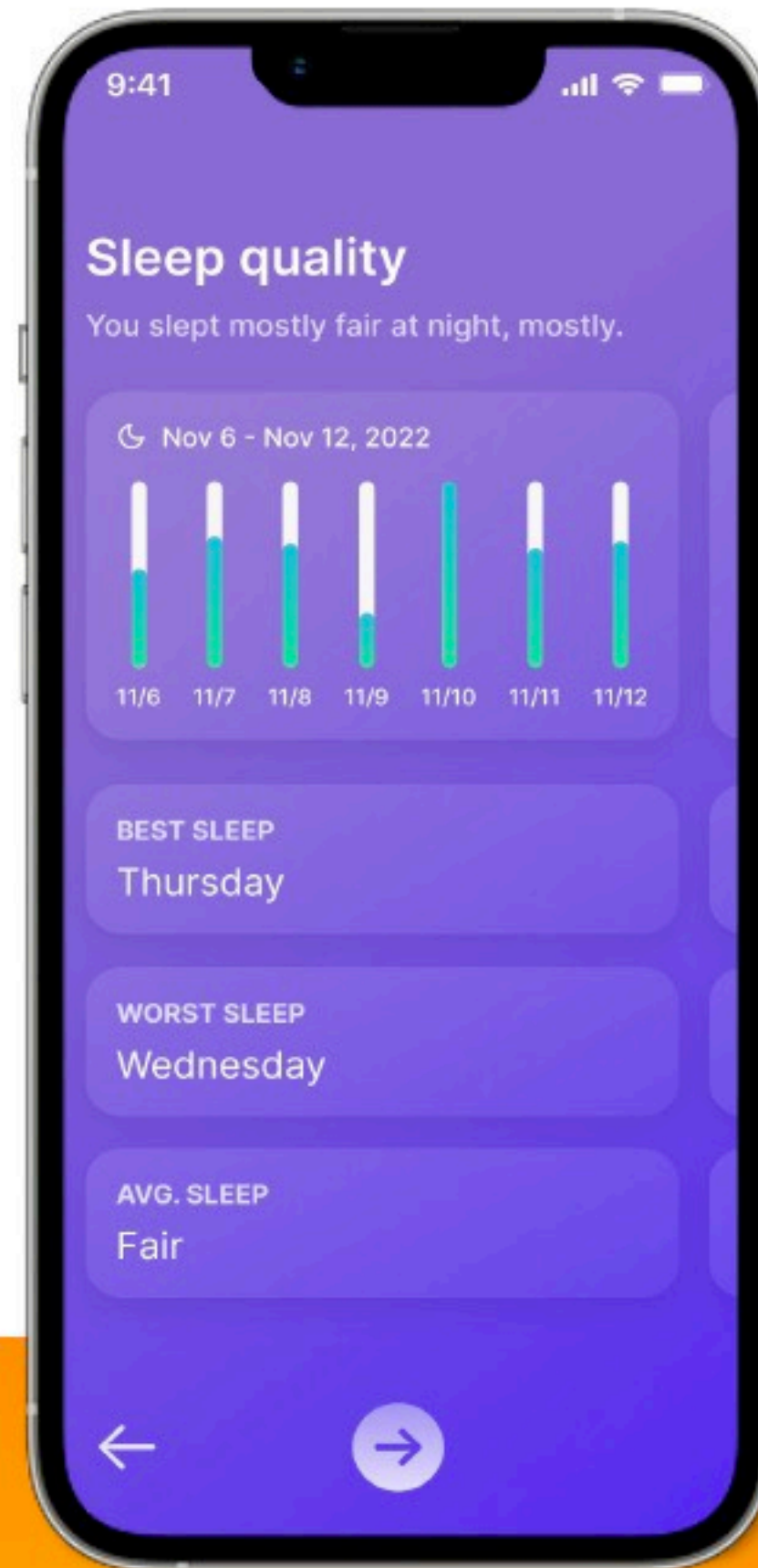
- Sleep analysis contains activity suggestions that address analyzed sleep issues, with option to add activity to user's program
- Educational resources surface activities related to the resource's topic, with option to add activity to user's program



Continuous evolution at major milestones

Major milestones such as the 2-Week in Review offer the opportunity for users to view larger data trends and pivot per the app's guidance.

- Tracking progress towards goals and suggesting continuing the goal, escalating it, or starting a new one
- Tracking behavioral trends of adherence to program and offering suggestions that might increase overall engagement



SoMiBo Companion App Experience

ROI

- Market differentiator in supplement market (US/Canada)
- Increased user engagement and retention
- Increase in conversion rates for users purchasing supplements
- Improved sleep outcomes leading to stronger user loyalty and advocacy
- Optimized supplement use and reduction in user drop-off (personalized profile, behavior nudges, sleep data insights)
- Improved sleep health metrics for users (wearable integration)

Thank you.