

## UX Strategy & Innovation | 1995-2020

Working as a VP of UX, Strategist and Innovation Lead, my primary role consisted of both building and managing UX Teams and leading efforts to discover, design and deliver product solutions.

Some of the organizations I advised include: McDonalds, OfficeMax, Allstate, Bridgestone, Northern Trust, Walgreens, Anixter, State Farm and others.

### Leadership

#### *VP, Managing Partner & Practice Lead*

- Founded and developed UX agencies comprised of disciplines including Research, Information Architecture, Experience Design, UI Development and User Testing.
- Provided UX guidance and leadership to corporations on the maturation of their UX practices and identification of innovation opportunities.
- Collaborated with Marketing, IT and Business Stakeholders on the strategy, budgeting, and delivery of core initiatives.
- Instituted UCD delivery methodology and design sprint techniques to ensure successful delivery of digital solutions.
- Created an interview process consisting of screening, interviews and workshops to identify candidates and gauge competency.
- Maintained P&L responsibility for select Service Offerings.
- Provided leadership and mentorship to internal employees and client teams.
- Participated in Executive Leadership Teams as a representative of Digital direction.

### Design & Innovation

#### *TD Ameritrade's Innovation Incubator | April 2019 – April 2020*

- Collaborated with Bionic to institute design thinking and lean startup concepts into an approach for business incubation and problem identification.
- Generated solution alternatives within an Opportunity Area to drive entry into new market spaces.
- Led and participated in efforts to validate problems, build and test solutions, and establish new business models.
- Experimented with solution concepts to validate/invalidate assumptions to generate insights.
- Performed qualitative analysis through interviews to identify problems and challenges as they relate to personal finances and investing.
- Generated assumptions and identified TAM & TAP.
- Conducted secondary research to establish knowledge of the industry and our target audience.
- Established a framework for presentation and funding requests to our Growth Board.
- Presented and 'pitched' to the Growth Board on business and market opportunities and funding requests.

#### *Sierra Nevada Corporation | January 2017 – March 2019*

- Represented the Experience Design discipline on enterprise projects working with the broader development team.

- Created an enterprise Design System consisting of a component library and schematics influenced by Material Design.
- Collaborated with IT and Business Stakeholders to ensure successful delivery and team development.
- Performed user research and business analysis to identify goals and scenarios.
- Architected wireframes for operations, business intelligence (Microsoft PowerBI) and CRM (Microsoft Dynamics) solutions.
- Participated in the design of prototypes and user testing.

#### *MB Financial | February 2016 – December 2016*

- Provided UX guidance and leadership to the internal design and UI development team.
- Collaborated with Marketing, IT and Business Stakeholders to ensure successful delivery and team development.
- Focused on the primary .com property to determine the evolution to a responsive solution.
- Defined the delivery approach and project plan to coincide with a user centered design methodology.
- Conducted user research and established personas and journey maps of key stories.
- Architected wireframes for the .com depicting various breakpoints across form factors.
- Established a content tagging and personalization strategy to deliver dynamic content.

#### *State Farm | May 2016 – September 2016*

- Facilitated ideation workshops with the Innovation Team to identify product opportunities.
- Established a roadmap to deliver a mobile product for flash testing.
- Participated in the creation of personas and user journeys.
- Created wireframes and visual concepts for primary paths and user scenarios.
- Supported the team producing the mobile prototype for iPhone.
- Defined a testing model to obtain feedback on usability and inform the business model.
- Collaborated on project tasks and benchmarks necessary to take the product to market.

#### *AbbVie | September 2015 – January 2016*

- Conducted an audit of the existing .com property to identify areas of opportunity, challenges and potential reuse to transform the site to a responsive solution.
- Performed a heuristic evaluation of the .com web property to provide opportunities for improvement of the navigation, interaction model and page structure.
- Presented findings to executive leadership and collaborated on the cost benefit analysis to request budget for a 2016 redesign.

#### *Motorola | July 2015 – September 2015*

- Provided recommendations and insight on the integration of UX disciplines for enterprise projects.
- Reviewed traditional requirements of an application supporting the configure, price, quote (CPQ) model for salespeople to manage their workflow.
- Adapted user personas and developed user journeys to clearly articulate needs prioritization.
- Collaborated with internal teams to refine the project plan and integrate UX activities.

- Architected wireframes to depict interactions, functionality and information organization.
- Designed visual concepts for unique templates as a foundation for rapid-prototyping.

#### *Various / UX Consultant & Trainer | January 2015 – June 2015*

- Created custom curriculum to educate clients on the purpose of user experience design and methods to integrate UCD into agile and other delivery approaches.
- Conducted hands-on workshops to validate business needs and perform a co-design effort outlining user needs, journeys and concept sketches.
- Crafted and presented the 'Value of UX' to executive leadership articulating the evolution of the digital ecosystem, maturation of UX and the business value of adhering to a UCD approach.

#### *Allstate | January 2014 – December 2014*

- Served as a strategic advisor to the VP of UX in growing the 6-person team to 2 dozen and establishing an integrated digital culture.
- Established a user research approach including observational field studies, contextual interviews and mock-up interviews to establish personas and journey maps.
- Performed a heuristic evaluation of an enterprise application to identify opportunities to improve the agent and customer experience.
- Collaborated with internal teams and executive stakeholders to refine the project charter and establish the customer value proposition for an enterprise initiative.
- Architected hi-fi wireframes to capture interactions and depict functionality and information organization.
- Designed a mobile solution to support multi-line quoting for agents.
- Performed facilitation as part of a 60-person Agency Summit to co-design solutions leveraging a user-centered design methodology.
- Provided mentorship, education and guidance to a multi-disciplinary team.
- Participated in the planning and management of key digital initiatives and integration of a user-centered design approach into an agile methodology.

#### *Anixter | April 2012 – December 2013*

- Built and led a 6-person UX team to support application initiatives as part of a cohesive delivery team.
- Performed analysis and research to establish an understanding of the user audience(s) and develop personas and 'day-in-the-life' studies.
- Evaluated thousands of pages of requirements documentation and extracted core functionality to establish navigation maps, process flows and wireframes.
- Collaborated with internal teams and participated as a member of the executive steering committee representing User Experience and Web Strategy.
- Established a user-centered design process and instituted key techniques utilized in agile design and development including the institution of 4-week sprints, timeboxes, backlogs, etc.
- Conducted scenario-based usability testing following each sprint to incorporate key findings into our design process.
- Integrated multiple disciplinary resource tracks into a common and holistic delivery model.

- Generated the strategy, experience design and visual framework to transform an enterprise order entry application into a vision for creation of a comprehensive 'sales desk' dashboard.

#### *UL | January 2012 – June 2013*

- Evaluated content management solutions across 3 acquired companies to establish a common strategy and structure for the management of information (content, assets, documents, etc.).
- Performed analysis within the Environmental Unit to identify workflow processes and opportunities to automate and create efficiencies.
- Generated navigation maps and wireframes for an Enterprise Sharepoint Site consisting of Search, Activity Feeds, Document Management, Custom Workflows, Reporting and other core functions.
- Created plans for delivery and release schedules for the integration of technical tracks and an impact assessment to organizational change and adoption needs.
- Designed the user interface for one of the largest fast food companies in the world (client of UL) and extended their brand while effectively communicating functionality visually.
- Collaborated with the Business and Executive Management to provide guidance and direction on digital strategy including their customer experience strategy.
- Participated in the definition of personas for an Enterprise Portal and CMS initiative leveraging Sharepoint 2010, FAST and Azure.
- Architected and designed interactive reporting functionality including dozens of data points represented in multiple views.
- Outlined the strategy for the management of Safety and Global Regulatory documentation including the collaboration to develop a multi-phase implementation plan.
- Managed multi-disciplinary team to ensure the understanding of a common vision and architecture.
- Led the UX architecture throughout the delivery lifecycle for 3-Enterprise Sharepoint implementations.

#### *Sentry Insurance | February 2011 – January 2012*

- Managed UX team and BA team to ensure on-time and within budget delivery.
- Provided thought-leadership and established a user-centered design approach for delivery.
- As a consultant, fulfilled an interim VP of eBusiness role to define digital initiatives and establish a UX Competency within the organization.
- Performed competitive analysis, market assessment and heuristic evaluation of the business-to-business marketplace including self-service functionality.
- Established strategic web-enablement plan to establish a holistic and comprehensive web strategy including B2C.com, B2B.com, Social Media, and Mobile.
- Created plans for delivery and release schedules for the UX disciplinary track.
- Collaborated with the Business and Executive Management to provide guidance and direction.
- Designed Sentry.com 2.0 to enhance the experience and ensure a strong brand footprint on the web.
- Defined user flow and recommended functionality enhancements.

- Designed reports and charts providing data aggregation, multi-level views and dashboard summaries.
- Created navigation maps and wireframes supporting the .com and services including Account Registration & Management, Payment Services, Claims Reporting, and more.
- Created plan for Persona development from Participant Inquiries and Research to design of the Personas.

#### *Allstate | September 2010 – February 2011*

- Performed competitive analysis, market assessment and heuristic evaluation of the mobile marketplace and Client's mobile application suite.
- Identified key gaps in product offerings for Insurance, Banking & Investments.
- Established roadmap identifying key themes for success, core functionality and defined prioritization metrics for recording ROI.
- Articulated KPIs and mapped them to Business Requirements working with Marketing and Technology.
- Created plans for delivery and release schedules including resource allocations and budgeting.
- Collaborated with the Business and Executive Management to provide guidance and direction.
- Analyzed the costs of implementing features and functionality and made decisions on internal vs. external resource planning.
- Served in a capacity to 'push the boundaries' of technology to address business needs and leverage the cutting-edge mobile capabilities.
- Created conceptual models for mobile efforts.
- Designed mobile user-flow and recommended functionality enhancements.
- Created navigation map and wireframes supporting new product offering.

#### *OfficeMax | March 2010 – December 2010*

- Redefined user experience for key segments of the E-commerce flow and functionality.
- Designed the user experience through the creation of navigation maps and wireframes.
- Facilitated work sessions to understand requirement mapping to information architecture.
- Conducted usability assessments on the B2B and B2C .com web site.
- Completed wireframes for modifications to Order Status, Store Locator, Repeat Orders, Rebates, and various other sections of the web sites.
- Created user scenarios and process flows to support the e-commerce experience.
- Performed heuristic evaluation on the MaxPerks (Rebate Site) to consolidate the process and integrate rebates into the checkout experience more effectively.
- Managed the content and graphic design teams to ensure the experience reflected the existing online presence.
- Collaborated with the technology team to integrate the HTML/CSS templates with a structure to function on ATG.

#### *Walgreens | February 2010 to March 2010*

- Established user scenarios and usability scripts for prototyping.
- Facilitated work sessions to understand requirement mapping to information architecture and BCC.

- Designed the user experience through the creation of navigation maps and wireframes.
- Conducted heuristic usability assessments on the existing .com web site utilizing ATG.
- Mapped user scenarios and process flows to e-commerce experience.
- Collaborated with content and graphic design teams to ensure the experience was maintained throughout the design process.
- Architected the enhanced order status process for the enhanced .com experience.

#### *Argosy University | July 2008-January 2010*

- Facilitated work sessions to identify the profile segments most suitable for marketing online via social networking environments.
- Designed a Program and established the project plan, staffing levels, etc. to deliver programs for prospective students, students and alumni across the targeted social networks.
- Delivered on-time and within budget for environments including Facebook, MySpace, Blogger, Twitter and numerous other ancillary networks.
- Consumed analytics and reports identifying key insights to drive design and development efforts
- Created a support model to ensure consistent updates and modifications to the environments.
- Established an Online Reputation Management Program providing weekly status of negative mentions of the University and solutions to counter any identification of negative messaging.
- Established a mobile social media strategy designing the interface for integration of both Facebook and Blog posting.
- Designed marketing eFeed integration model to support determination of CPL and CPA via tracking entrances and bounce rates via the origination of the lead.

#### *DeVry University | January 2007- June 2008*

- Evaluated Oracle Portal as solution for the Student Finance Website focused on three core audience segments.
- Established program defining the current state of Discovery, Applicant and Student and transformed the current state to a future state understanding.
- Developed program controls leveraging a Software Process Framework (SDLC) to establish multiple project tracks for all practice competencies.
- Created a multi-phase scope matrix and Definition Document outlining the approach.
- Instituted weekly status meetings to review scope, issues, risks and assumptions.
- Monitored work tracks and resource allocations to ensure on-time, within budget delivery.
- Managed multiple vendors and resources and promoted collaboration via meetings and work groups (delivery pods).

#### *Pillar Data Systems | January 2006 – March 2006*

- Collaborated with Lead Content Manager to obtain information on user audience.
- Generated use cases, navigation maps, wireframes and content sets for identification of skeletons needed within WebLogic Portal and attributes for TeamSite.
- Designed look and feel comps and identified guidelines for portlet skins.
- Generated click-thru prototypes of user experience.

### *John Deere | June 2005 – September 2005*

- Designed strategy model to effectively gather website goals, needs and vision.
- Hosted information work sessions throughout the initial strategy phase of the program life cycle to define user profiles and informational assets.
- Oversaw definition of existing Interwoven Teamsite environment and IBM Portal environment.
- Provided model to integrate Interwoven Teamsite with IBM Portal utilizing a dynamic delivery concept.
- Designed Visual POC for a redesigned visual presence following delivery of content via the recommended delivery module.

### *Wendy's | March 2005 – May 2005*

- Analyzed existing application model to determine integration between a CMS (Stellent) and WebLogic Portal.
- Gathered information on user audience, conducted work sessions and provided oversight during the design of the Information Architecture (navigation map, wireframes) to support findings.
- Managed the content audit of the existing Intranet to define grid structure and placement of portlets within Skeleton(s).
- Reviewed requested features/functions to be extended leveraging WebLogic Portal.
- Designed Visual recommendation for Skin customization.

### *Caremark-CVS | May 2003 – December 2006*

- Advised executive management on the Content Management Process and organizational requirement needs for Stellent to support their constituents.
- Recommended the structure to define and manage the Content Management Program.
- Maintained all project controls including, but not limited to, scope matrix, definition deliverables, design documents, issues and risks logs, resource and budget management, etc. for multiple projects using an Agile methodology working iteratively.
- Managed multiple vendors, internal resources and contractors to ensure efficient delivery across the Program.
- Oversaw and facilitated work sessions and requirement gathering for process alteration, information categorization and content management.
- Validated site structure, user scenarios, operational profiles, information/relationship architecture and portlets.
- Collaborated with business units in the evaluation of current and future processes.
- Assessed and managed the development of a POC providing integration between WebSphere and the selected CMS, Stellent (Oracle Content Manager).
- Defined model for WebMD XML feeds to be processed via Stellent and dynamically delivered via the web site.
- Designed the look and feel and all information architecture and technology deliverables for their Intranet. (internal constituents now approximately 200,000).
- Integrated Stellent (OCM) with WebSphere Portal to provide a comprehensive solution.
- Managed multiple projects and performed analysis on projects ranging from application development to website delivery comprising multi-million dollar budgets.

### *Northern Trust | January 02 - April 2003*

- Facilitated work sessions throughout the program life cycle and managed the delivery and integration of various content management and administration features to streamline the delivery of informational assets.
- Developed program controls leveraging a Software Process Framework to oversee multiple tracks including content management, reporting integration and site development and design.
- Performed content definition including meta-data schemas, user definition, attribute documentation, workflow, source, behavior, profiling model, etc.
- Evaluated the integration of Broadvision and Interwoven TeamSite.
- Established ECM strategy & architecture for multi-channel implementation leveraging TeamSite as CM engine
- Implemented content contribution, screen building and dynamic delivery modules to streamline the content life cycle.
- Managed and delivered Teamsite upgrade to 5.5.

### *ABN AMRO | June 2000- December 2001*

- Refined the Business Case, Key Performance Metrics and Success Criteria for the Content Management leveraging Interwoven TeamSite.
- Oversaw and facilitated work sessions and requirement gathering for process re-engineering, workflow and content management including delivery via Broadvision.
- Defined preliminary Content Types, Items and Attributes including Categories and SubCategories utilized by TeamSite and Broadvision.
- Validated user scenarios, operational profiles (communities and matching rules), information/relationship architecture.
- Evaluated and defined processes across Business Units, Legal and the Content Group.
- Assessed current business unit editorial workflow and develop base line enterprise-level processes.
- Collaborated with Services Groups and Business Units to assess feasibility of solution.
- Assessed Interwoven TeamSite and BroadVision integration and determine key hurdles including templating, workflow and meta-data schema relationships.
- Developed preliminary navigation maps, wire frames, content matrix and prioritization use cases including paper prototyping.

### *Morningstar | September 1999 - May 2000*

- Oversaw and managed the expectations of executive sponsors, business unit leads, end-users and internal teams to deliver a Content Management Program and 'online advisor workstation'.
- Facilitated sessions to define business objectives, requirements, process re-engineering, technology requirements, e-commerce solution, etc.
- Participated in developing model for advisor-focused marketplace enabling B2B shopping.
- Provided leadership to both clients and internal teams including practice integration, deliverable integration, portal practices, and process alteration.
- Managed delivery of 30+ member team and multi-million dollar budget as part of the Project Management Team.



- Analyzed the functional capabilities of e-business portal platforms with the selection of Vignette.

#### *iExplore | March 1999 – August 1999*

- Advised leadership on the commercialization of their online business and launch of their digital footprint.
- Collaborated with and led a team of designers leveraging ATG.
- Designed information architecture including nav maps, wireframes, etc.
- Implemented formal SDLC processes and procedures to effectively manage team and delivery.
- Communicated with business stakeholders project specifics such as risks and issues, status and resource allocations compared to budget.
- Created architecture to support high-volume e-commerce capabilities ranging from search and shopping to transaction completion and shipping.
- Developed interface guidelines and brand extension specification.

#### *Hewitt Associates | January 1998 - February 1999*

- Collaborated with and led a team of analysts to define all traditional compensation management processes and re-engineer them for a digital environment.
- Performed analysis and modeling of user interaction and behaviors to validate business requirements.
- Created storyboards defining organization of content, functionality and features including overall content and feature relationships.
- Facilitated paper prototyping work sessions to validate information, interaction and usability decisions.
- Developed interface guidelines and brand extension specification.

#### *Northern Trust | January 1998 – August 1998*

- Hosted requirement gathering sessions to determine needs for both an external Corporate Money Market Account Application and internal management component.
- Analyzed traditional behaviors and formulated models supporting adaptation of new processes for the Internet.
- Translated business requirements and processes and mapped to functional areas for system requirement specification.
- Leveraged SDLC principles to manage team and extend to UI-centric model.
- Created interface guidelines and extended to low and high-fidelity prototypes.

#### *Rush Medical Center | July 1997 – December 1997*

- Supervised all aspects of the Rush Internet and Intranet.
- Restructured the Rush Web Site to be more functional and visually intriguing.
- Collaborated with executive management to develop web policies, standards and content management requirements.
- Established HTML templates for production of the Rush Internet and Intranet.
- Acted as liaison to all groups within Rush in the determination of business requirements and user needs.
- Managed programmers and other disciplines to develop functional online utilities.

### *Consulting | 95-97*

My primary function was collaborating with users to define business objectives and program requirements. Clients included: Alexian Brothers, Beltone, McDonald's and others.

- Directed initiatives for print and interactive media projects.
- Facilitated sessions to determine requirements, baseline scope, vision, etc.
- Managed the design process and integration of practices.
- Worked with design teams to produce collateral materials and web sites.

### **Education**

Illinois State University

Degree: Bachelor of Science, Design Concentration

1993-1997

### **Honors and Recognitions**

- Keynote Speaker on Experience Design and Innovation
- 2004-2006 BEA CHI User Group Leader
- 1999 HOW Magazine July Issue : Project Mention.
- 1999 I.D. Magazine Interactive Design Annual : Silver Award.
- 1999 Macromedia Site of the Week : DHTML Zone.
- 1999 Project Cool Site of the Day.
- 1998 HOW Design Self Promotion Annual : Interactive Media Merit.