

**Hi, I'm Kat.**

Very nice to meet you.



# Background

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## **A few facts about me**

Currently working as the Manager of UX Design at Independence Blue Cross.

I'm first generation Filipina American

I have bulldog basset hound rescue named Lemon

Began my career building brands near Philadelphia

Graduated from Drexel University with a concentration in web and motion graphics

Just after college, my first real paying creative gig was Youtube until I got a real job

My sister-in-law and I have the same first name as well.

# A little more about me...

## Core Skills

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**UX Research & Strategy**

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**Product Definition**

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**Developing User Test Plans and Interview Guides**

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**Content Strategy**

**Workshop Planning & Facilitation**

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**User Interface Design**

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**Design System Creation & Management**

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**Content Strategy**

## Certifications

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**Pragmatic Certified Product Manager**

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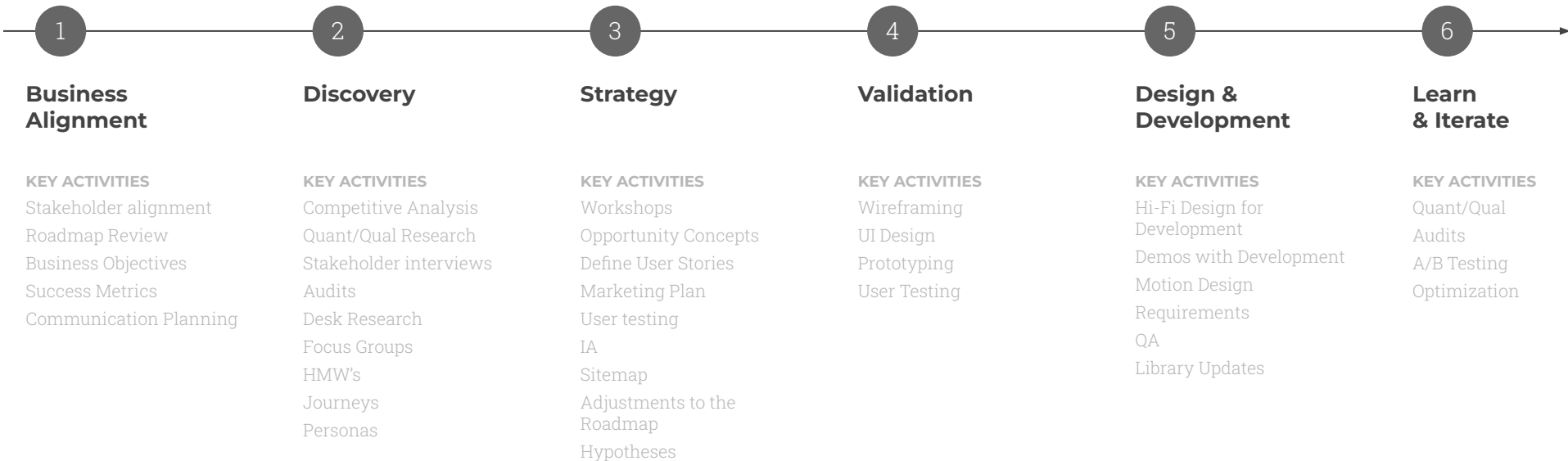
**Professional Scrum™ with User Experience**

My Process

**A scientific approach to a  
traditionally subjective skillset**

# A scalable process

All projects have some level of each step. This repeatable process gives the best chance for truly understanding the problem and creating a viable solution.



Project Examples

**A few things I'm proud of**

# Brand Schematic 2018



This schematic represents the core understanding of who Tonic is as company, what we stand for, and why.

## Brand Promise

We make the imaginary possible.

*This is an extension of the current vision. This is the promise we make to our clients as well as our employees.*

## Brand Attributes

*These words represent functional and emotional associations with the brand moving forward.*

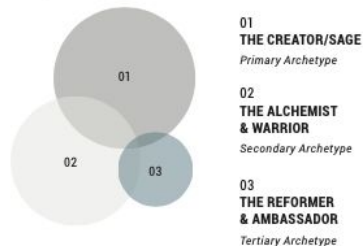
Casual	Raw
Aggressive	Accessible
Nimble	Entrepreneurial
Planned	Battle-tested
Modern	Fearless
Deliberate	Human

## Brand Core Beliefs

- |  |   |
|--|---|
| 01 We do what we say.                              | 04 We approach problems as a team.                                      |
| 02 We are problem solvers.                         | 05 We actively seek opportunities to develop our skills and each other. |
| 03 We are committed to the precision of our craft. |   |

## Brand Personality Breakdown

*Understanding our brand archetypes and narrative can get us deep in the psyche of our clients. These archetypes represent guiding story points for how we speak about ourselves and how we want to be seen.*



## Brand Personality Story Points

- PRIMARY NARRATIVE**  
Primary Archetype
- Deep satisfaction from both process & creating something that didn't exist
  - Process-driven freedom
  - Internal culture is focused on quality innovation
  - Perfectionist by nature
  - Won't settle for ambiguity
  - Focus on enduring value
  - Appreciates transparency
  - Aren't afraid of the unknown
- SUPPORTING NARRATIVE**  
Secondary Archetype
- Characterized by curiosity
  - Finds solutions in science
  - Magic of creating something from nothing
  - Tends to seek a new path
  - De-emphasizes rules
  - Turns a mess into a miracle
  - Believes that limits are self-imposed
  - Strong sense of duty
- SUB-NARRATIVE**  
Tertiary Archetype
- Affects change by improving the system rather than completely destroying it
  - Strategically maneuvers complex issues to restore stability
  - Promises safety/security

## Key Stakeholders

*Key audiences that our brand strategy should consider.*

**Current/Future Employees**  
**Current/Future Clients**  
**Philadelphia Community**

## Target Client Segments & Opportunities

### C-LEVEL

#### Pain Points

- Winning product definition
- Speed to market
- Limited budget
- Fresh perspective on old problems
- Lack a capable tech partner
- Behind the 8-ball

#### Our Key Differentiators

- Nimble
- Can ideate, build, execute strategy
- Cheaper/faster than larger agencies
- Lower barrier of entry with technology
- Less commitment upfront
- Eager/Hungry partners
- Deep understanding of technical/design

## PRODUCT OWNERS

#### Pain Points

- Buy-in
- Lack of vision
- Understand product relevance
- Understand audience
- Lack time/money
- Lack technical resources

#### Our Key Differentiators

- Someone who'll be in the trenches with them
- Support throughout the whole process
- Customer/client insights
- Competitor insights
- Research and documentation
- Process for prioritization/acceleration
- Uncover the right story

## ENTREPRENEURS

#### Pain Points

- A brand/marketing plan
- Inability to scale
- Product roadmap
- Product support
- Buy-in
- Speed to market
- Need investors

#### Our Key Differentiators

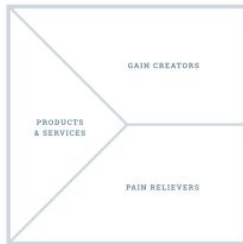
- Investor presentations/materials
- Feature ideation
- Competitor audit/insight
- Product value propositions
- Market research & positioning
- MVP definition & development
- Product roadmap
- Brand identity

## Brand Overview

Tonic's precision in technology empowers our partners to maximize the value their digital experiences bring to their businesses, customers, and world. As bold partners and guides to innovative disruptors or the courageous ones taking their first step, Tonic offers our craft to digital voyagers of all stripes.

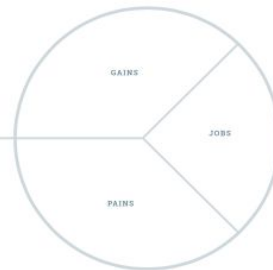
**OUR MISSION** Tonic Design Co arms its partners with the capabilities, tools, processes, and people they need to thrive in the digital now and to fearlessly embrace the digital future.

**THE VISION** In a world of continuous change, our fearless curiosity leads us forward.



## VALUE PROPOSITION CANVAS Advanced User

Hybrid Professional | Developer | Visual Designer



### PAIN RELIEVERS

Pain relievers describe how exactly your products and services alleviate specific customer pains. They explicitly outline how you intend to eliminate or reduce some of the things that annoy your customers before, during, or after they are trying to complete a job or that prevent them from doing so.

#### COULD YOUR PRODUCTS AND SERVICES...

... produce savings? In terms of time, money, or efforts.

... make your customers feel better? By killing frustrations, annoyances, and other things that give customers a headache.

... fix under-performing solutions? By introducing new features, better performance, or enhanced quality.

... put an end to difficulties and challenges your customers encounter?

... wipe out negative social consequences your customers encounter or fear? In terms of loss of face or lost power, trust, or status.

... eliminate risks your customers fear? In terms of financial, social, technical risks, or things that could potentially go wrong.

... help your customers better sleep at night? By addressing significant issues, diminishing concerns, or eliminating worries.

### GAIN CREATORS

Gain Creators describe how your products and services create customer gains. They explicitly outline how you intend to produce outcomes and benefits that your customer expects, desires, or would be surprised by, including functional utility, social gains, positive emotions, and cost savings.

#### COULD YOUR PRODUCTS AND SERVICES...

... create savings that please your customers? In terms of time, money, and effort.

... produce outcomes your customers expect or that exceed their expectations? By offering quality levels, more of something, or less of something.

... outperform current value propositions and delight your customers? Regarding specific features, performance, or quality.

... make your customers' work or life easier? Via better usability, accessibility, more services, or lower cost of ownership.

... create positive social consequences? By making them look good or producing an increase in power or status.

... do something specific that customers are looking for? In terms of good design, guarantees, or specific or more features.

... fulfill a desire customers dream about? By helping them achieve their aspirations or getting relief from a hardship?

... produce positive outcomes matching your customers' success and failure criteria? In terms of better performance or lower cost.

### JOBS

Estimate cost and timing

Gathering input information for project (Tech specs + objectives)

Add Dynamic Elements / Data

Nuanced animation control

Layout of signage

Animation

Connecting data sources

Style typography

Get approval from client

Test in environment

Create preview for client review

Deploy project into Content Manager

Schedule in Content Manager

Gather all technical requirements

Develop/receive clear art direction

### PAINS

Not able to preview in environment with client

Versioning issues with product

Typographic breaking when compiled

Not Mac compatible

Licensing costs for Designer software

Lack of documentation, tutorials, and community support

Not understanding which version of Scala is running on machines

### GAINS

Delivering high quality, immersive interactive experiences

Managing delivery timelines to profitability (Work faster, easier, make more money)

Feel confident that delivery will display properly in production environment

I want to be able to pass my project from designer to developer with ease.

I want to be able to seamlessly jump from visual representation of my project to the code behind it.

I want to be able to figure out the data integration on my own.

I want to create my designs with pixel perfect precision.

I want to learn more about how I can harness Scala Script.

I want to be able to find answers to my questions.

I want to be able to communicate changes to my clients easily.

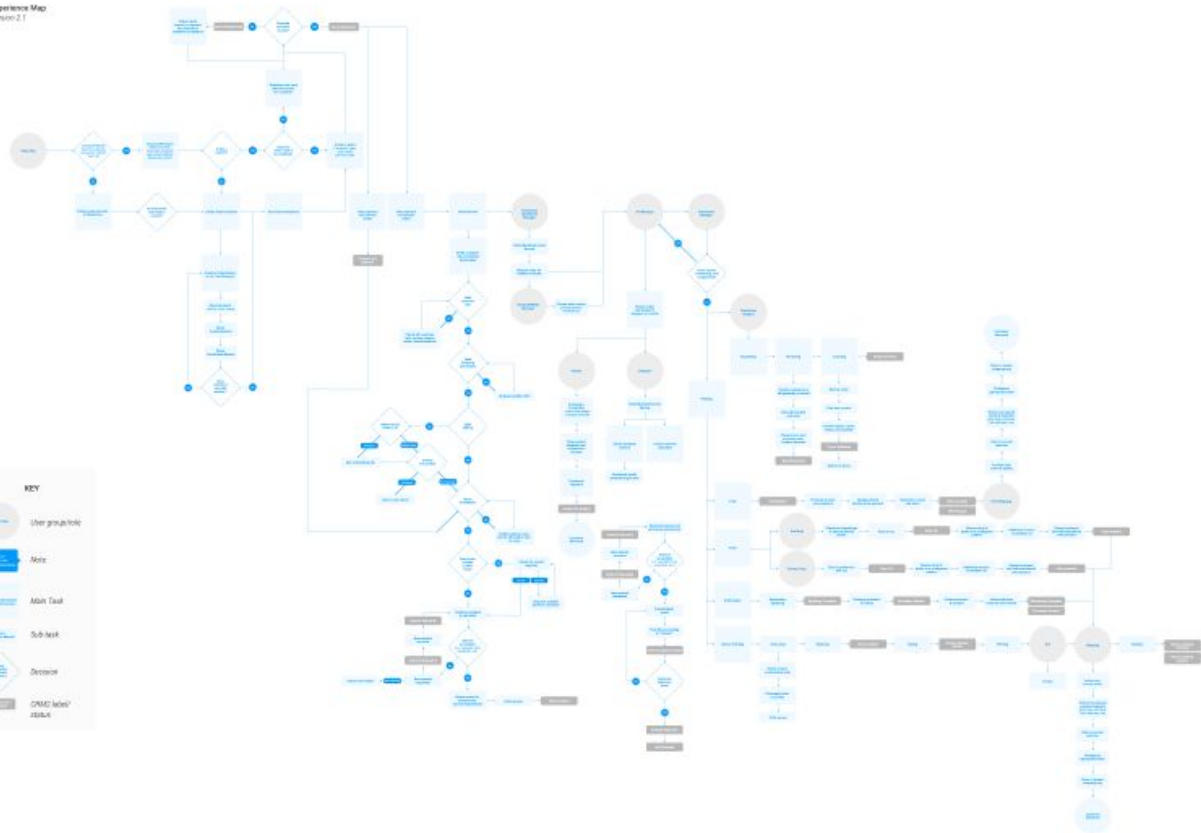
I want to be able to easily communicate edits on a project.

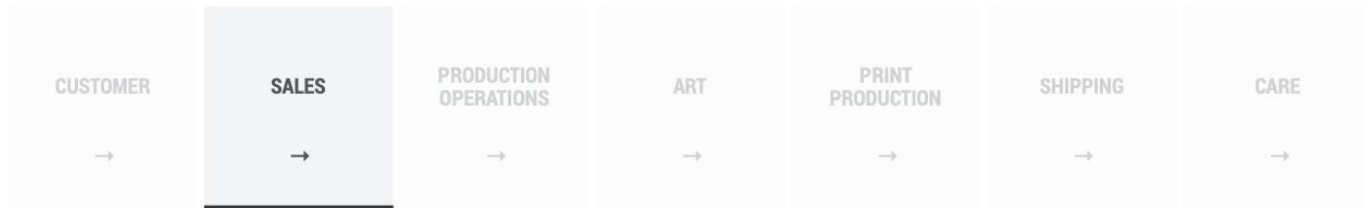
I want to easily envision what my screens look like together.

I want to be able to repurpose my work.

I want to work in familiar/intuitive environments







**“I need these t-shirts fast.  
Whoever makes it the easiest  
for me, I’m going with.”**

What We Heard | Sales

**PAIN POINTS**

- Difficulty onboarding
- General page navigation doesn't align with expected workflow
- Redundancy
- System lag

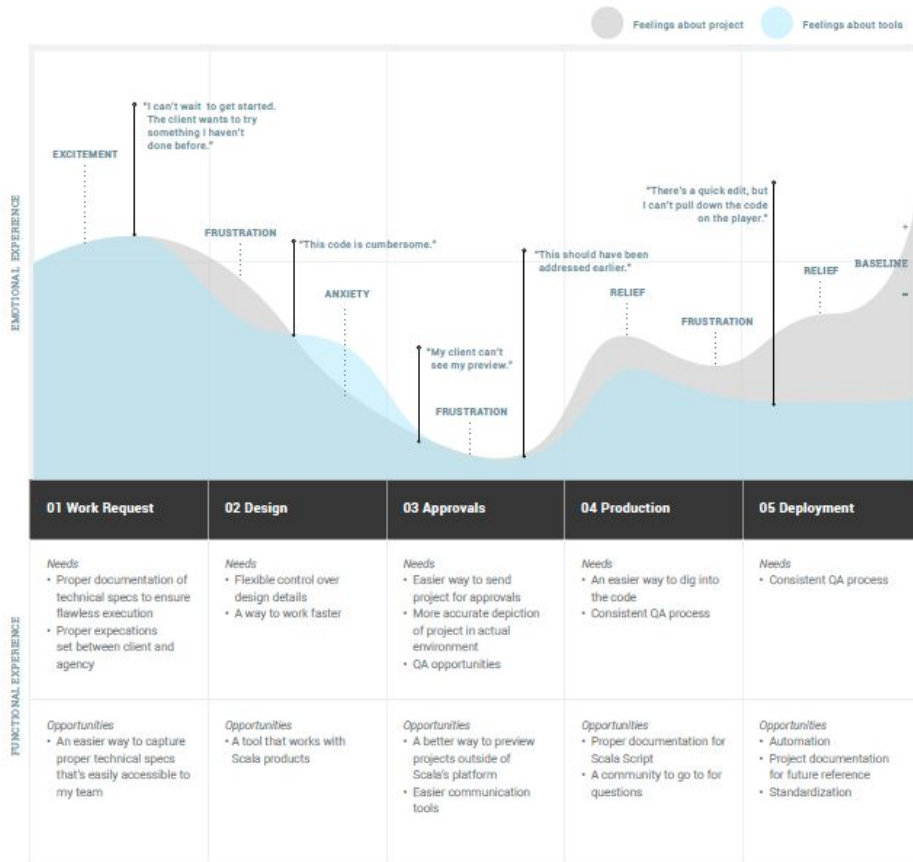
**OPPORTUNITIES**

- Build guardrails for consistent order intake, increased speed, and more accurate intake
- Mobile system



User Persona | Developer

# Experience Map



Notable Projects

# **Scala Innovation Team Project**

**One of the deepest UX research initiatives I've been a part of, Scala wanted to understand the potential their proprietary system had moving into the future. Based on countless interviews and hands-on workshops, we were able to produce a clear vision and purpose for the team and their product.**

**You can see a link of the final deliverable by clicking the title above.**

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## **My Role**

Lead research  
Produced and facilitated design workshops  
Synthesized findings  
Created recommendations and roadmap

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## **High-level Overview**

Stakeholder alignment  
Roadmap Review x  
Business Objectives  
Success Metrics  
Communication Planning

## Notable Projects

# Home Depot Pitch

**Our team was challenged to produce blue-sky ideas within 1 week to the team at Home Depot. The team eventually won the deal which resulted in a machine learning device to be used by consumers in store.**

**You can see a link of the final deliverable by clicking the title above.**

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### My Role

Lead research and pitch process  
Produced proto-personas for design challenge  
Lead internal design workshops for

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### Highlights

It was noted by the team from Home Depot that how deep we were able to go and accurately identify their target personas and clearly articulate the opportunities was what won the business.

Notable Projects

# Gateway UX Research Practice

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## My Role

Created a sustainable process for continuously connecting with users of our digital products

Created connections with key stakeholders in the organization to express the need and value for such practice

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## Highlights

This research has not only allowed our team to move in a direction we're more confident in when it comes to building iterations for the product, but we've also built a strong and trusting relationship/presence in our Financial Professional community.

Notable Projects

# Gateway 2.0 Execution

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## My Role

Stakeholder alignment  
Roadmap Review Management  
Design Library Management  
Work with dev to execute  
Creating marketing to launch product

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## Highlights

Being able to build relationships with Fp's face to face  
Collaborating with multiple departments in th

# More Examples

Successful documentation should be able to clearly articulate findings, conclusions, and functionality without guidance.

More importantly, documentation should be something that you and your collaborators come back to throughout each project.

**You can find a full folder of example documentation and other examples of my work [here](#) with the password “hireme”.**



That's all I have for today.

**Questions?**