

HIGHTOWER (Wealth Management)

ROLE – Experience Designer TIMELINE – May 2022 – August 2022

HIGH-LEVEL ASK

Identify and **implement** a new suite of enhancements to the company's internal application, to continue it's evolution. Additionally, **identify** and **prioritize** short and long-term opportunities.

MAIN OBJECTIVES (during discovery phase)

- Understand stakeholders' vision for their internal application and how it supports Hightower's strategic vision
- Identify current barriers to making an improved product
- Understand advisors' professional vision + goals and how internal application supports those goals
- Understand internal platform user-behaviors, including most common tasks and contexts
- Begin to envision the future of the internal platform

BACKGROUND RESEARCH

Based on research findings during the strategy and research phase, the team identified **3 personas** we would be focusing on as well as narrowed down the **4 epic concepts** to be explored including: Persona-Based Homepages, Knowledge Sharing Library, On-boarding Wizard and Pre/Post meeting bot

APPROACH

Prioritization workshop – the team's opportunity to co-create on the top epic-level concepts with field users

During this workshop, the team presented field users with an overview of enhancements we intended to apply to each feature, along with basic wire-frames. We then asked the users to rate the **impact** of each feature, how much they would **invest** in each feature (given a set amount of spending money) as well as general feedback/what builds they would like to see.

- This workshop was conducted through the use of a **Miro board** which allowed for interaction between users which helped guide the conversation
- After the workshop, I used my notes, the Miro board and the meeting transcripts to create some slides presenting the average impact rating, avg. investment, the overall thoughts for each epic, what users liked, and the builds for each epic. (These slides were then used in our prioritization presentation to the Hightower executive team.)
- Our team then narrowed in on the features within each epic and which we recommend prioritizing based off **effort** and **impact**
- During our Executive team prioritization presentation, it was decided we would focus on the **Persona based homepage** while also creating mockups for the **future of the content library**.



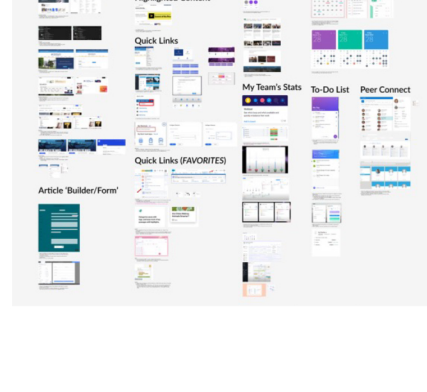
PERSONA BASED HOMEPAGE

For the Homepage, a major ask was to provide easy access to the data that already lives in the internal platform. Our solution to this organization/accessibility pain-point was to create widgets so that the user can customize their homepage based off their specific needs and behaviors.

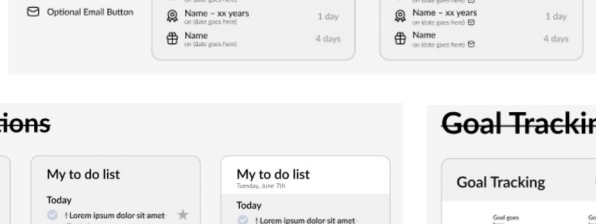
My main task was to focus on each individual widget, do some independent research and gather references for each.

(Competitive analysis)

Working in Figma, I created a page where I compiled all reference photos for each widget and included my notes on what worked well, potential tweaks we could make to fit our needs, etc.

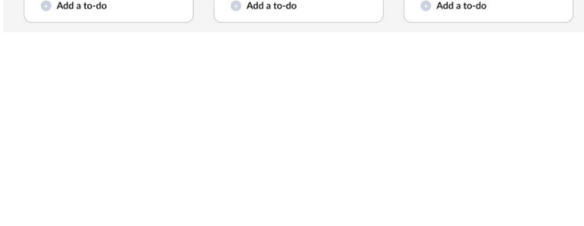


Birthdays/Anniversaries



From here, I began creating low-fidelity wire-frame options for the widgets based off my research as well as feedback/asks from field users during our workshops.

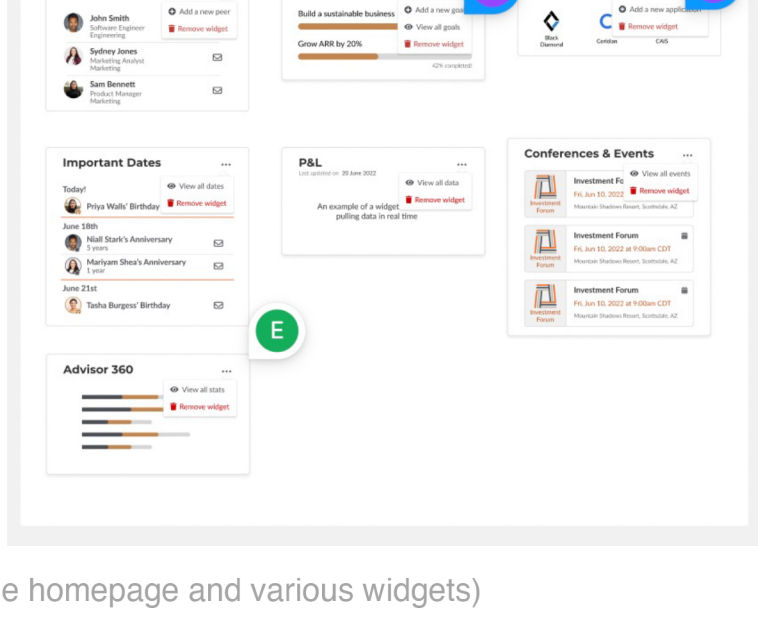
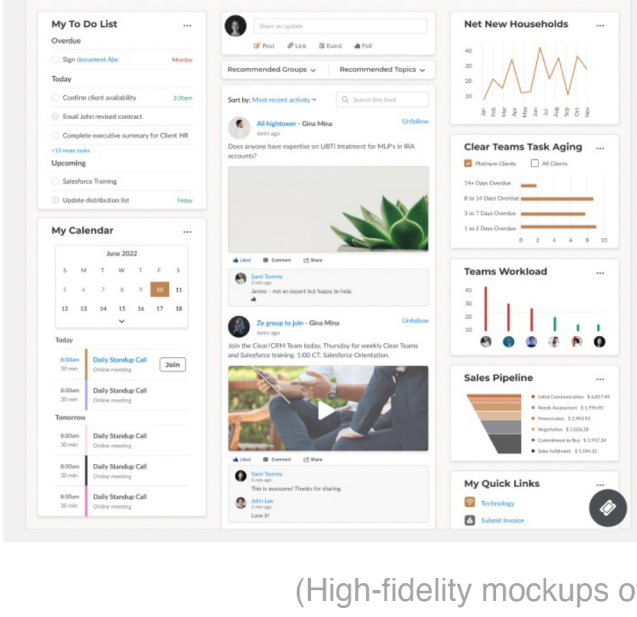
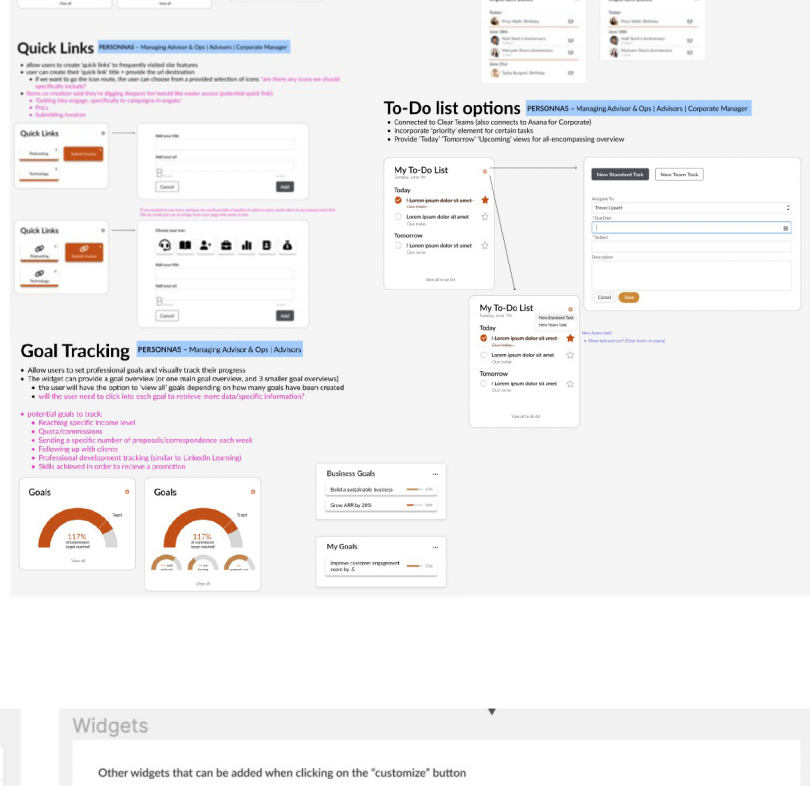
To-Do list options



Goal Tracking

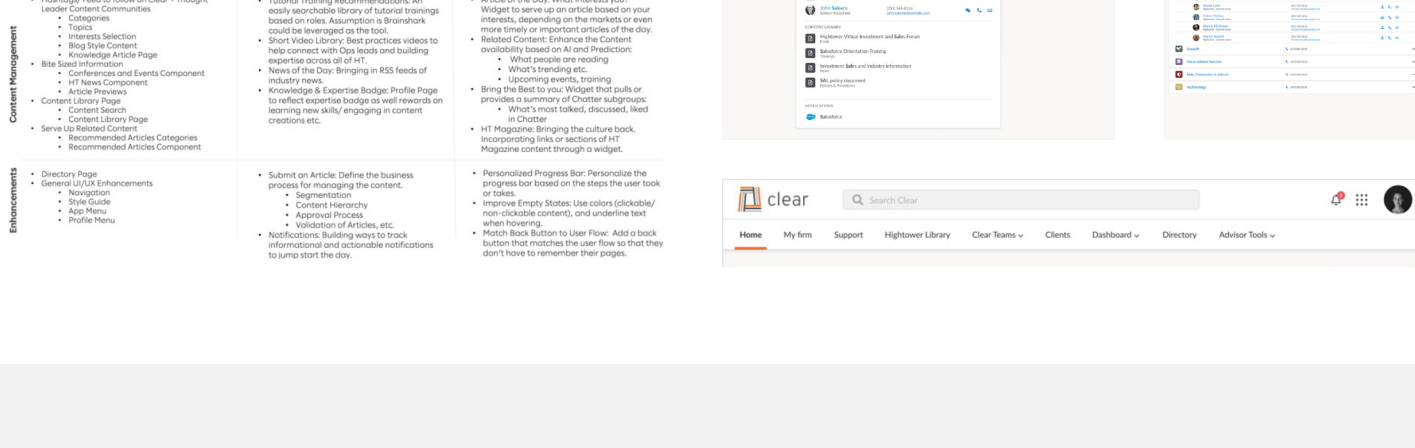


I then built upon each wire-frame to create the most successful widget designs, meeting with the client and internal team to get feedback on the direction of the designs.



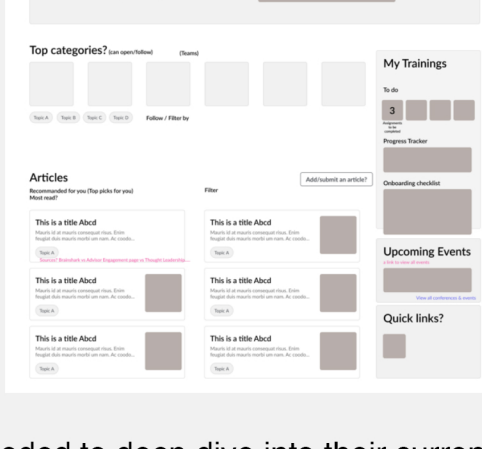
(High-fidelity mockups of the homepage and various widgets)

As a team, we acknowledged that the designs, while important, could be rendered useless if not **feasible from a technical standpoint** within our projected timeline. Therefore, we worked closely with our Salesforce team-members who could provide insight into the effort level of each widget feature/what would be possible. While working on the homepages, we not only needed to work on widgets, but also the **navigation**, **search capabilities**, and the **directory**.



PROJECT SHIFT (Content Library focus)

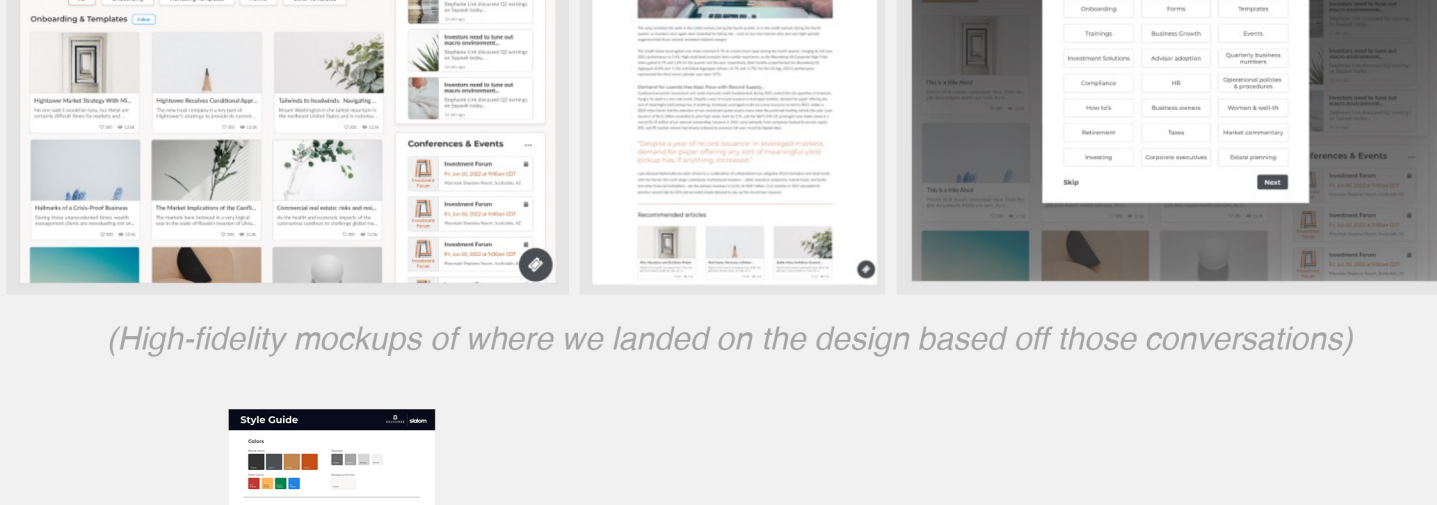
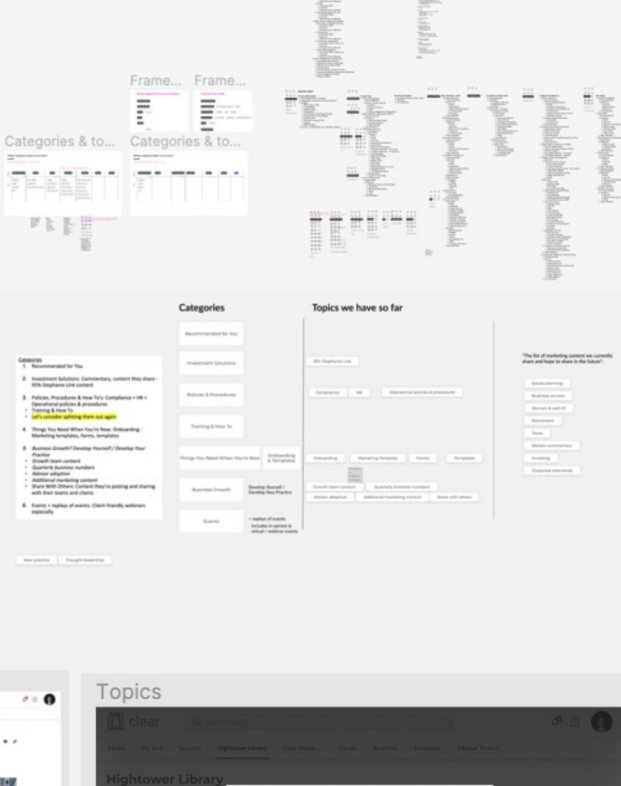
At this point, Hightower executives decided they wanted to focus more on the **Content Sharing Library** as opposed to the homepages. The good news was we had also created a low-fidelity wire-frame for the future of the content library which provided a great starting point.



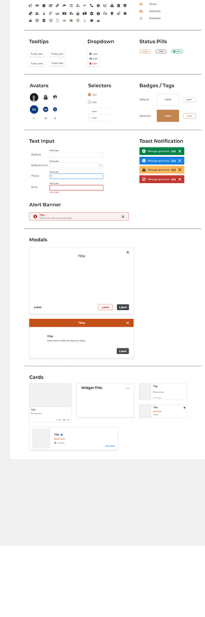
Building off the wire-frame, we needed to deep dive into their current 'knowledge sharing library' to get a better understanding as to how this content could be organized in our design.

The main block our team had was trying to figure out how to categorize all the current content and what potential 'topics or tags' we could use in order to organize the content.

Since the navigation/organization of the internal application was a major pain-point for every user we spoke to, this was definitely a make or break for the success of our design. Some of the ways we approached this issue included going screen by screen and noting what content lives where. Then attempting to group said content into larger buckets. We scheduled meetings with some Hightower Execs as well as their marketing team to see how they organize their content currently/ if they have any insight as to what categories a majority of their content falls under as well as brainstorming with our team and other internal individuals.



(High-fidelity mockups of where we landed on the design based off those conversations)



In order to ensure a cohesive look and feel across our various designs, we also had to create a style guide. This provided our team – and any future teams/work – with a reference for all UI features.

NEXT STEPS

After presenting our designs to the Hightower team, they not only reacted positively and moved in development, but they made the decision to enlist our company in another project.

FEEDBACK

"Ellen has always been willing to jump on calls to brainstorm + bring her opinions, point of view, and creative ideas to the table. She did an awesome job researching new trends on all the features we worked on, which gave a solid base when presenting our designs to the client. She also took the lead on creating the style guide and other design features with minimal direction. Ellen's hard work impacted the decision of the client to move forward with Slalom by giving us more features to work on!"

– Senior Experience Design Consultant at Slalom