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Five Case Studies

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Case #1: Recapturing the Customer Funnel

The challenge: When member-based insurance provider **USAA** began creating its 3-year mobile and customer retention strategy around servicing a newer, evolving customer base, Carol joined in the cross-team efforts for mobile banking and personalization. Metrics revealed that while 92% of USAA members (active duty armed forces, veterans and their families) retain brand loyalty for life, a newer persona demographic/age group aged 17-24 was overtaking the established customer base of 35-75 year olds mostly comprised of Gulf War, Vietnam, Korean War veterans, and a very scant remainder of WWII veterans. Consumer research projected fundamental changes to the customer funnel and a new market segment growth of 60% over the next ten years.

The solution: We gathered key performance metrics, persued daily feedback from the marketing team and data analysts, re-defined the new customer personas and explored and tested various new paid and owned digital media channels. To gain a wider understanding and unbiased view on the product users and their expected experiences, we measured both the quantitative and quality of experience. The combined methodologies are cyclical and iterative, so with Agile approach for example, we ran hypothesis testing, S&G and design validation phase concurrently with metrics reporting to gain a full picture. We combined these metrics with the revised user personas, prioritized requirements and issues and fed these reports into the next iterations or releases. We also applied updated technologies to the marketing teams data analytics applications.

The results: Improved data analytics gave us a clearer picture of this segment, it's customer journey, KPIs and behavioral metrics. Through owned media, SEO, contextual ads and personalization, program marketing, and by creating a sense of tribal culture and customer feedback through social media – all contributed to growth and retention of the newer customer base. A simplier, one-step product and services search and personalized contextual ads within the mobile banking app resulted in greater mobile usage and reduced calls to customer service by 35% in the first few months. Through social media and other owned media compaigns, USAA further simplified the customer journey, extended meaningful advisory content to the wider audience, increased brand awareness, as well as opportunities to communicate USAA's new and evolving products and services.

Case #2: Leveraging Unpaid Digital Media Channels for SBO

The challenge: Shark Diver LLC, a small specialty SCUBA dive operation wanted to minimize its digital marketing budget. The operation hosts a limited number of boat cabin spots for 1-5 days to and from various dive sites for eight weeks on the Mexico coast, six weeks in the Caribbean and 4 weeks in the Fiji Islands. The current campaign was not filling the open spots quickly enough to justify advanced costs of operations; however the bigger challenges were: limited marketing budget during the operation's early stages of growth, inability to secure full commitments in advance, at cost of around $3,000 for a 5-day trip; maintain the no-refund policy. The goals were three-fold – to maintain cost per new customer acquisition at almost zero; maintain cost per sustained customer at almost zero and to build a trusted brand around it's fundamental mission of marine life conservation.

The solution: - Created a digital marketing plan for maintaining almost-zero-cost marketing through content driven marketing, social media, partnerships with other dive operators and

marine life conservation programs; a new mobile app for checking availability and booking spots up to a year in advance; SEO/SEM, profiling the company's core mission through stories, conservation blogs, and partnerships with other eco-tour and adventure diving operations.

Results: For some market segments, the 'tribal' or emotional connection, convenience, the customer's likelihood to commit to terms, and their ease of use/experience, often turn out to be the most effective draw for new customers. Instead of selling people on a dive trip, we connected with them through community and sharing imagery, videos, and meaningful stories, as well as Increased exposure to a wider audience of scuba divers and those with a passion for endangered species and marine life conservation, since this was the true and sustainable market and the core mission of the company.

Case #3: Design Thinking

The challenge: Oregon-based start-up **Manzama LLC** wanted to enhance it's new product performance and ease of use they initiated Carol's user-centered design process expertise to evaluate the customer journey, run usability testing; re-face / re-architect the primary user interactions. The application enabled researchers to search across multiple, high-density media streams and through multiple organic subject matter and industry-focus e.g., trades publications, relative cases, product defects and recalls, product studies, and professional journals.

The solution: Carol conducted user research and initiated a new round of user stories around re-designing the flow for categorizing, querying, and creating customized page views. She also re-designed the content organizaiton for ease of use, to enable simplicity in displaying query results, improved readability and discoverability.

The results: Vastly improved user flow, new responsive framework, new design system for maintaining continuity and brand, and greater ease of use in gathering, viewing and categorizing complex research data. The subscription-based model was released within a year of completing 100% of user-centered design requirements.

Case #4: Operations Best Practices

The challenge: When **Gold's Gym International Franchising Inc.** desired to expand globally and educate franchisees in how to acquire and operate a health and fitness franchise facillity, they engaged Carol to create a paperless solution for streamlining the new franchise application process and also reduce the high call volume of new applicants.

The solution: Carol interviewed the brand manager, franchise operations managers, general managers, and fitness consultants from better-performing Gold's Gym facilities. These interviews established a basis for the franchisee onboarding experience and outlined the procedures ranging from club operations, to sales, to back office and hiring practices, to setting up fitness programs, marketing campaigns and retaining members.

The results: Carol created a scaleable self-guided intranet site for potential new franchisees and owners. Inititially it began as a secure online application wizard where those seeking a franchise could apply and submit relevant background and financial information. Later the site expanded to full-service space for all franchises and owners to access digital guides and manuals, operations standards and procedures, brand materials, annual conference info, and implement training programs through Gold's Gym University. The new intranet portal reduced the flood of calls to the operations group and became the benchmark of the organization's franchise recruitment, resources and training programs, resulting in a pipeline of over 300 new gym facillities worldwide

Case #5: Core Competencies

The challenge: nMetric LLC, going on its fifth year as a start-up was challenged with identifying and responding effectively to high-complexity product requirements, diversity of user roles, co-facilitation, production scheduling, and customer order tracking for it's manufacturing industry clients.

The solution: Carol reviewed the company's strategic plan, interviewed SMEs, product sales and engineering teams to define the core mission for the product. She brought the development team, BA's and project managers together for mapping and storyboarding sessions to encourage collaboration and integrate UCD and Agile development. In her role as UX designer, she facilitated the heuristic analysis of the current product, with focus on increasing transparency of primary actions, breaking down complexity of the scheduling decision, managing the risks, timeline, uncertainty of output, and the ability of the scheduler to directly control the schedule. The analysis lead to extending product usage perimeters to a wider set of personas, and validating a shift in application archetype from a simple timeline to a resources management and productivity-focused workflow model.

The results: Greater clarity of product and objectives and the consumer requirements, improved cross-team collaboration, a fresh visual design; commitment to design and style standards, new responsive-mobile framework, cyclical process to enable ongoing evolution and validation of the design; and extension of user personas from the one-dimensional shop floor manager to the plant managers, parts, procurement and order tracking, sales, customer service and strategic planning.

Case #6: Information Systems Conversion

The challenge: Lab Corp, the nation's largest provider of diagnostic laboratory services sought to expedite test results turnaround and productivity and integrate order entry, pathology and delivery systems, as well as decrease the patient wait time, typically 2-3 weeks.

The solution: Through the initial interviews and feedback received from healthcare providers, doctors, pathologists, phlebotimists, and SMEs and in partnership with the product managers and business analysts, we established a company-wide collaborative effort for creating a full-cycle suite of integrated lab test results delivery system. Within a year the UX design team grew from two to ten, and we established a collaborative-agile dynamic, which enabled respresentative users and subject matter experts to wallk through and approve proposed concepts as well as join the design and development team conversations around requirements, user stories, goals and objectives. We also partnered with the user experience and integration teams at Microsoft and Microsoft HealthVault™ to design and implement and joint-creative vision for the patient portal experience.

The results: LabCorb was the first in its industry to create a full cycle, seamless system for medical lab test resulting through integrated tools for pathologists, for generating reports and billing; for healthcare provider order entry and results; and direct-to-patient electronic lab test results delivery. Pathology case productivity and ease of use was significantly improved, and as a result we drastically shortened the timeline from test order to delivery, and ultimately, the ability for healthcare providers and physicians to provide quality care to the patients they serve. LabCorp continues to evolve in it's customer-oriented propositions, measure lifetime value, and monitor and strengthen it's mobile customer relationships.