

Sydney Marcus

UX/UI and Product Designer

Past – About Me

Hi, I'm Sydney 

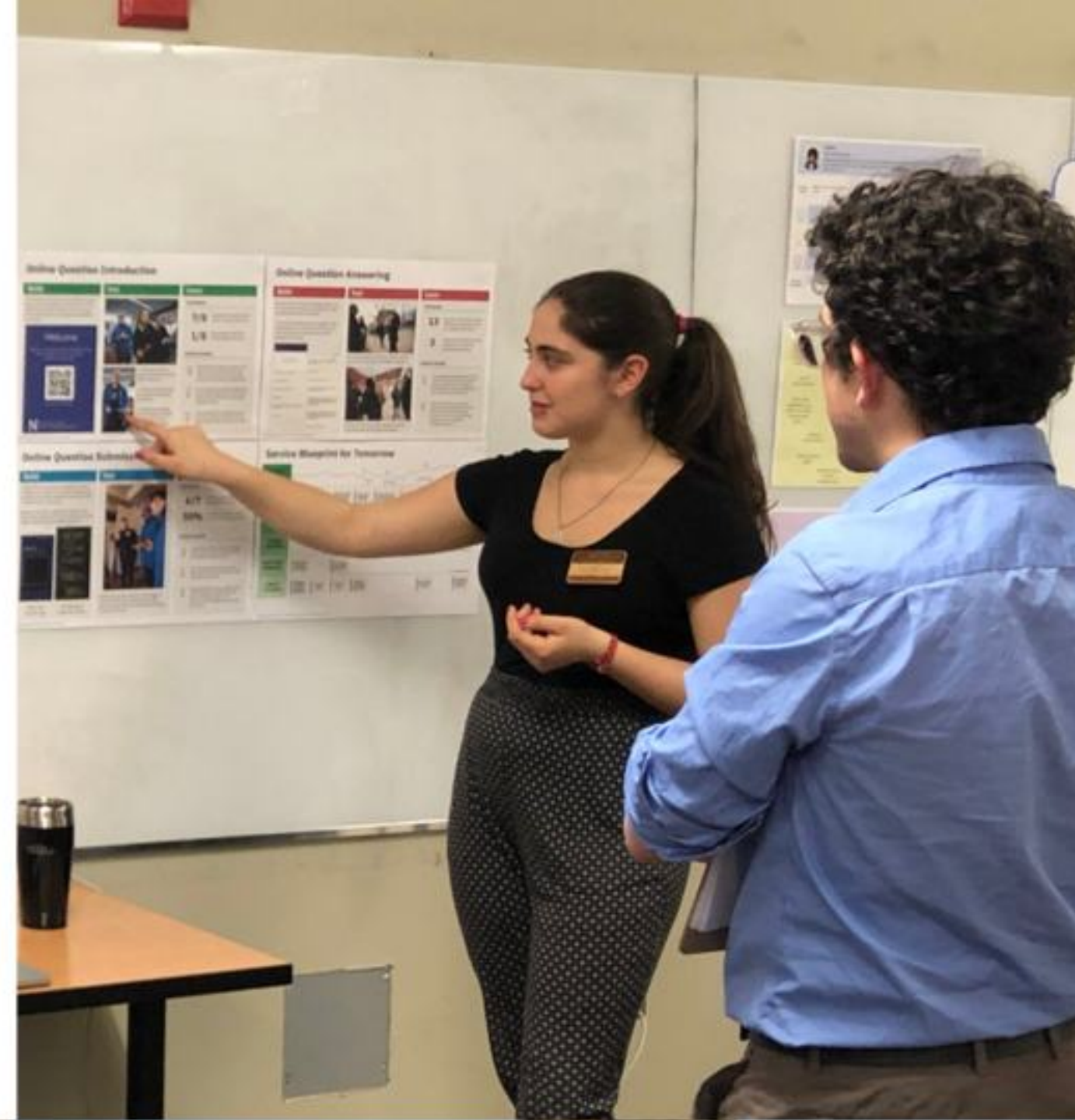
01

At Work

Superhero Identity: The Solutioner and The User Advocate

Leveraging my multi-dimensional background to tackle complex challenges

Creating impactful experiences, innovative products and delightful services





...it's in the details

Add the floor tracking screen to elevators
Indicate a new email has arrived with "(1)" in the tab name
Show the local time for recipients and senders for international communications

Take the extra step for delight and comfort

...tackle the big challenges

HMW reduce sexual assault on college campuses?

HMW make college more financially accessible?

HMW design with accessibility at the heart?

HMW reimagine an entire industry like banking?



Outside of Work

National Team Flag Football Player

Competitive Dancer

World Traveler

Only Child



Present – My Work

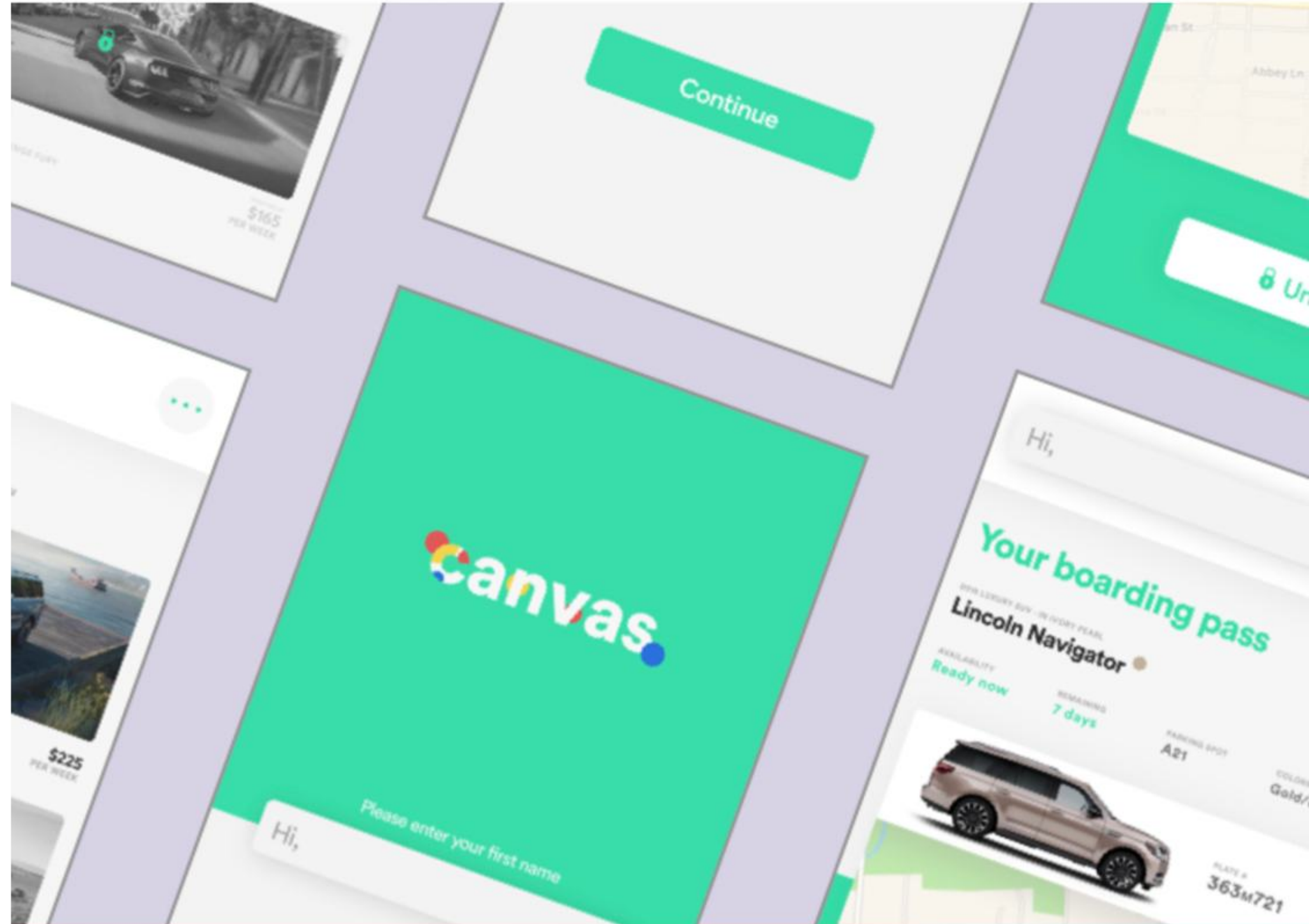
Let's look at some case studies!

02

CANVAS

Ford Motor Company

As the mobility market expands, vehicle manufacturers experienced a dip in brand loyalty. Ford sought to better understand their customers and create in-vehicle experiences that encouraged drivers in all sectors (ownership, rental, subscription) to remain within the Ford family.



The Process:

01

Research

- Ethnography (CA) + Interviews (MI)
- Personas, Gaps in Service, Pain Point

04

Iterate

- All day session creating mid-fis
- 4 Potential Flows – Concept Selection

!! Technology Limitations

02

Brainstorm

- ID Business, Design, Tech Goals
- Design Thinking Session: 3 Concepts

!! Competing interests of 5 teams

05

Visual Design

- Brand, Logo, Colour, Screen Creation
- High-fidelity App

!! Integrate with business & tech teams

03

Validate & Benchmark

- 30+ Competitor Users Interviewed
- 3 Use Cases Identified – 1 Selected

!! Compressed Timeline – 2 Weeks

06

Present

- Ford Global Design Expo Presentation
- Presented to Design Leadership

A close-up photograph of a person's hand holding a red pen over an open notebook. The person is wearing a grey and white striped sweater. The background is blurred, showing what appears to be a desk or office environment. The word "Loyalty?" is written in large, white, sans-serif font across the center of the image.

Loyalty?

Large research effort – Why are people loyal to vehicle brands?

Research

01 – Ownership and Comfort

Ford vehicles are often "family cars"

Multiple drivers of varying age, gender and physical size

Desire: Each person desired a unique sense of **ownership** and **comfort** in the vehicle

02 – Personalization Barrier

"I know my car and my car knows me, but a new car will not"

New car = Re-set all preferences

Desire: **Retain vehicle personalization** when moving through the Ford line-up so it feels as if **any Ford vehicle** "knows you".

HMW make all drivers feel a sense of ownership & comfort in any Ford vehicle?

NANCY NICHOLS - Master Gardener

Sample from
another project



"It's simple, that's the important thing; if they're made out of brass then they will last. The 8 setting nozzles and wands are overkill."

AGE 72

OCCUPATION Retired - Botanical Gardens Volunteer

LOCATION Park Ridge, IL

Biography

Nancy is an experienced professional gardener with an expansive knowledge of plant life, soil, and gardening tools. She currently volunteers as a master gardener at the Chicago Botanical Gardens.

Although her friends often suggest various branded nozzles, Nancy prefers to use inexpensive brass nozzles and guides. She knows that she gets the exact function desired, without all of the unnecessary settings and seals.

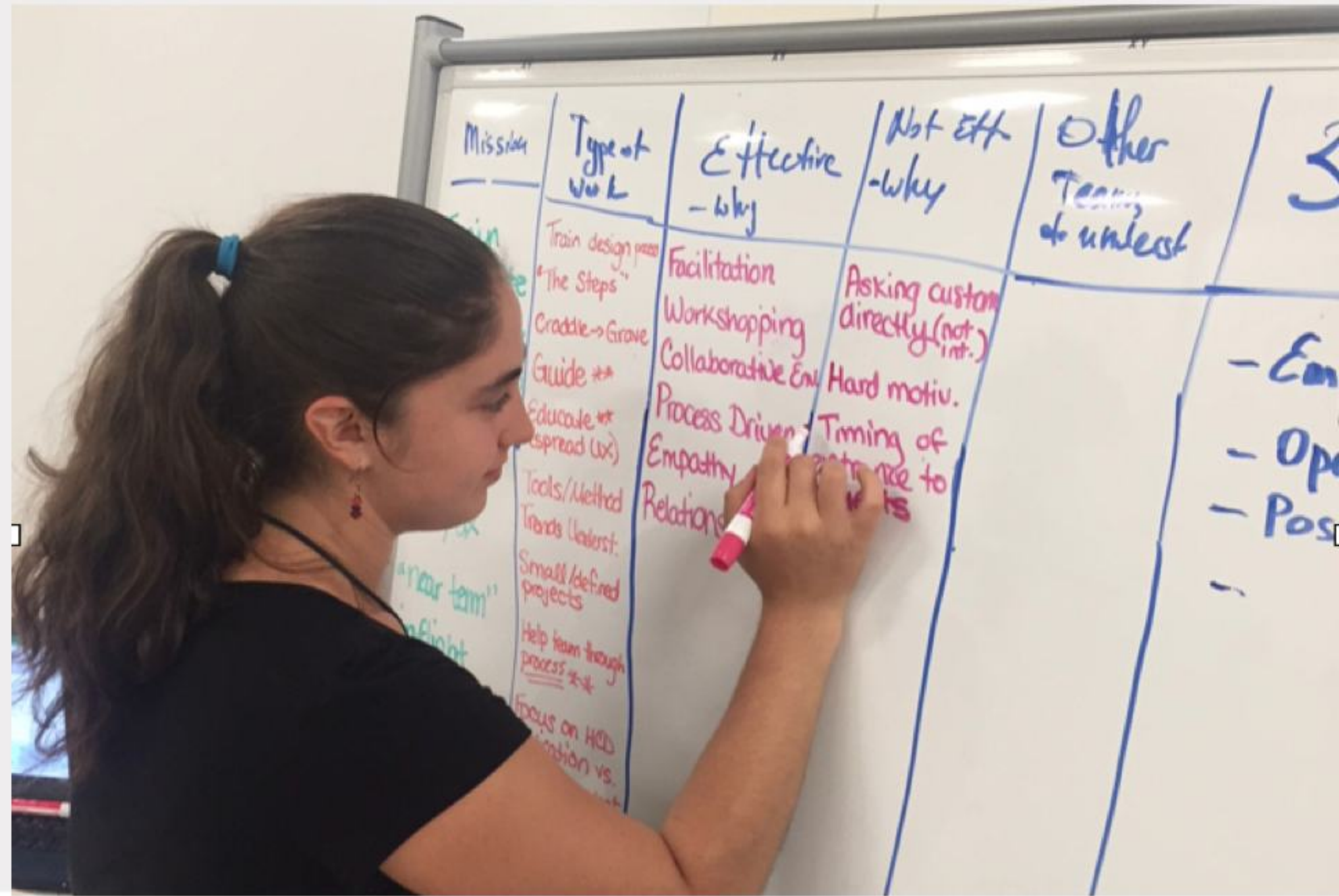
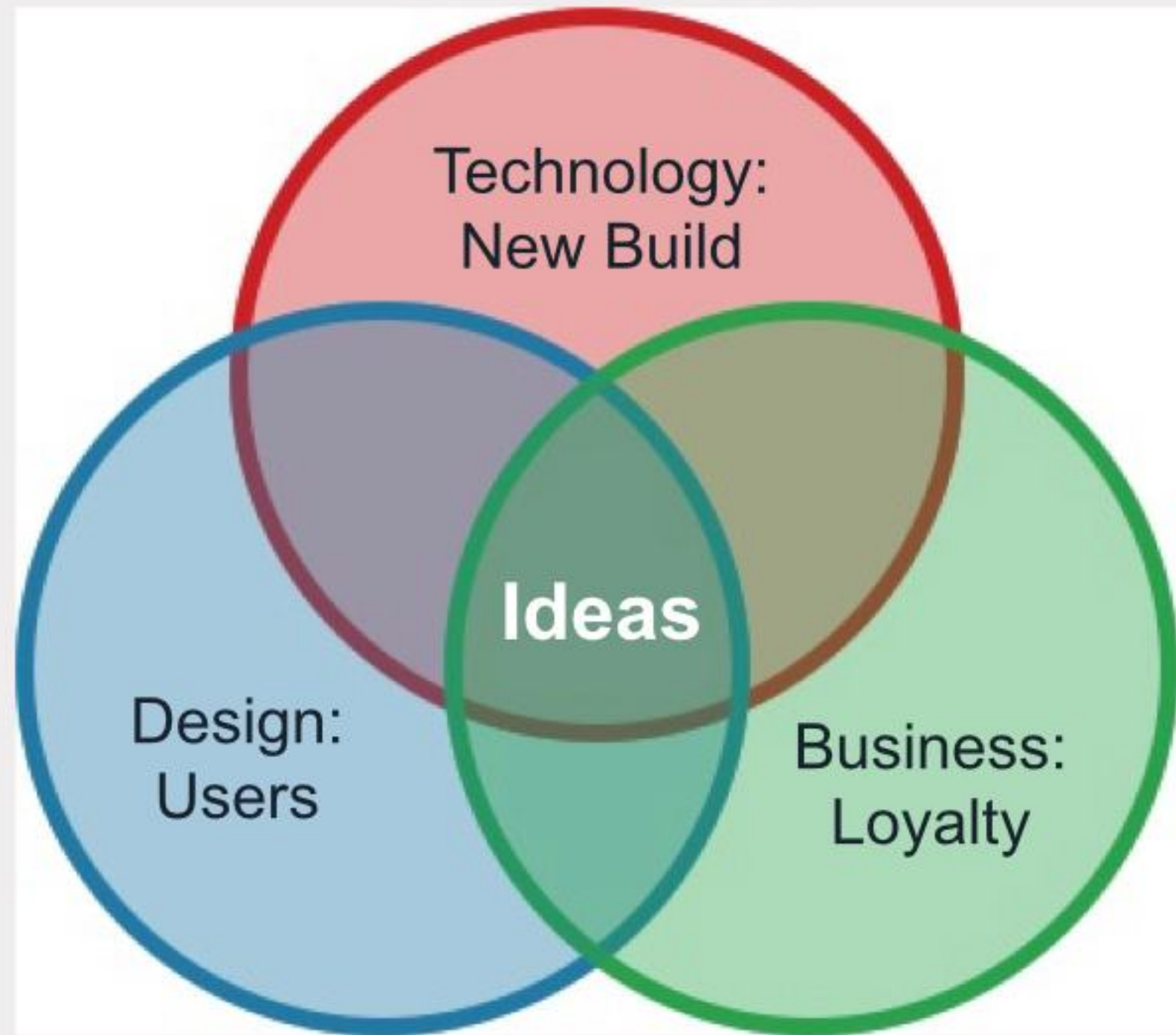
Nancy emphasizes the importance of material choices, in the gardening 101 class she teaches at CBG. She likes to remind new gardeners that long term gardens are best watered by drip systems, which are commercially available, but won't put one in for herself because she doesn't know how much longer she will be able to tend to the garden herself.

Nancy's Opinions

Biggest struggle: Timing is the most important and most difficult part, especially when deciding when to move plants from her basement green room into the garden outdoors. "Frost is the enemy, avoid it at all costs". Her only other headaches are weeds, fungi and squirrels.

Physical Limitations: Nancy has knee pain that makes it difficult to kneel, but her hands work well "especially for [her] age".

Thoughts on Current Tools: Nancy finds current tools to be overly complicated, with many features that are simply unnecessary. She believes that the best tools are the simplest, which means that material choice is the most significant factor in the effectiveness and longevity of the product.



Brainstorm

Design Thinking Session with 5 teams

Portable Profiles





Using Phone As A Key, Ford vehicles identify the driver before they enter the vehicle and adjust over 30 settings to their exact preference

This technology allows the user's settings to be applied to any vehicle in the Ford lineup



Validate & Benchmark

1. Interviewed 10 current Ford owners to get a “pulse check” on how much Ford customers connected with the idea of Canvas
2. Interviewed 30+ customers of other brands with similar concepts to identify where they fell short

Company Name	Profile Limitations	Customizable Features	Primary or Intended Users
	<ul style="list-style-type: none"> • Max 3 Profiles • Settings can only be applied to vehicle when user is inside • Limited to vehicle where profile was made 	<ul style="list-style-type: none"> • Seat Location • Mirror Location • Steering Wheel Height 	<ul style="list-style-type: none"> • Many Vehicle Owners • Secondary Drivers • No Passengers
	<ul style="list-style-type: none"> • Max 3 Profiles • Settings can only be applied to vehicle when user is inside • Limited to vehicle where profile was made 	<ul style="list-style-type: none"> • MID Display Settings • Audio System Display • Driving Assistant Display 	<ul style="list-style-type: none"> • Some Vehicle Owners • Some Secondary Drivers • No Passengers
	<ul style="list-style-type: none"> • Max 3 Profiles • Settings can only be applied to vehicle when user is inside • Limited to vehicle where profile was made 	<ul style="list-style-type: none"> • Seat Location • Exterior Mirror Location • Heads-up Display (HUD) 	<ul style="list-style-type: none"> • Vehicle Owners • Few Secondary Drivers • No Passengers
	<ul style="list-style-type: none"> • 3 Profiles hard-set in vehicle • Unlimited profiles held in app • Settings applied before user enters vehicle • Profiles can be applied to any/all vehicles 	<p>30+ Features Including:</p> <ul style="list-style-type: none"> • Navigation & Climate • Mirror & Pedal Location • Radio Presets & Voice • Seat Location...and more 	<ul style="list-style-type: none"> • Vehicle Owners • Secondary Drivers • Passengers • Subscription Model • Potential Multi Modal Users

Defining the Use Cases

We created three unique cases for customizable profiles.

By not allowing ourselves to be limited by unique persona characteristics or the presence of a vehicle, this idea moved past an in-vehicle experience benefit to one that impacts the entire transit experience.



Subscription +
Multi-Vehicle

Part A: Renting a Vehicle

- Allow users to apply their Profile to any Ford rental vehicle thereby curating a positive, memorable experience & encouraging them to rent Ford

Part B: Subscription Platform

- Build the user base of Ford's subscription platform, Canvas then operating only in California

Part C: Lessee Retention

- Create an incentive for new or existing lessees who are looking to join or remain in the Ford family



One Vehicle
Multiple Owners

Part A: Family Vehicles

- Reduce friction between family members who have different tastes in music, climate or lighting AND those who have significant height differences - impacting preferences such as seat location and steering wheel height

Part B: One-Time Lending

- Enable owners to easily lend their car out to visiting family, friends or others without having to readjust the seat and other preferences when it is returned



Multi-Modal Transport
(including AV)

Part A: Ride Sharing

- Allow users to feel at home in Ford ride-share vehicles by applying their preferences to the area of the car they are seated in

Part B: Multi-Modal Journeys

- Enable Ford to become involved in all parts of multi-modal journeys by applying profiles to seats/ sections on public transit, within ride-share vehicles, and bikes or scooters.
- *This includes preferences such as where on the bus riders prefer to sit & how long they can bike for.*

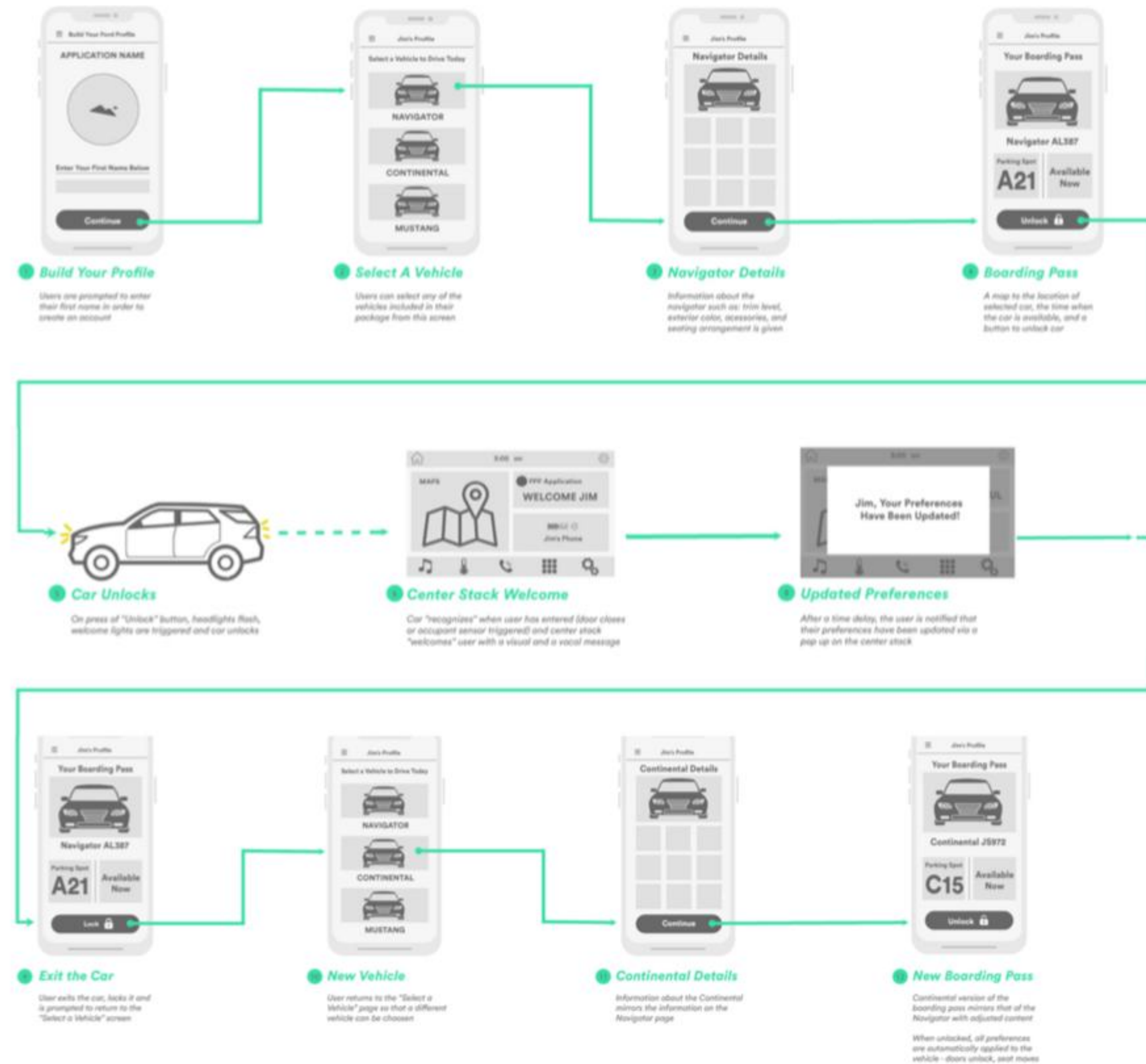
Iterate

Our team was asked to use a 2-week sprint to create an MVP for presentation at the Ford Global Tech Expo.

We focused on Part B of the Subscription + Multi Vehicle use case as Ford was in the process of expanding their subscription service, Canvas.

We went through 4 potential flows for demonstration at the Expo and selected this one based on tech limitations & clarity.

(I can't show other flows and sketches)



Interaction Design

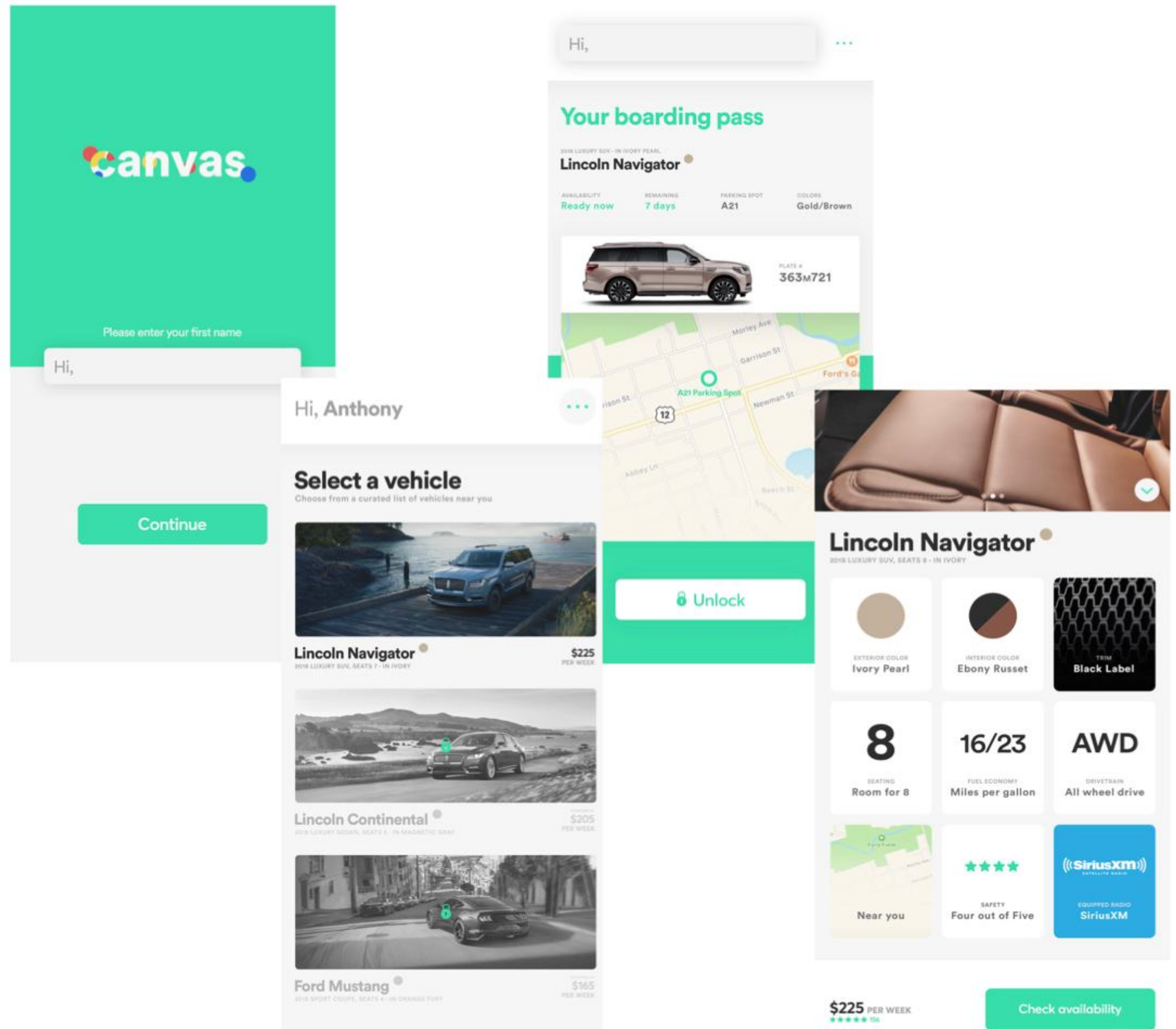
1. Pulled over 40 inspiration samples, creating "imagination wall"
2. Looked at existing best practices and mobile design patterns



Visual Design

1. Created new Canvas logo
2. Applied general branding and styling from existing website (new colors)
3. Designed pixel perfect screens for mobile and center stack display

Created using the Adobe Suite & Sketch



Interactive Prototype

Using Figma we created a clickable prototype to hand off to our development team

I worked hand in hand with the developers to get the screens pixel perfect and to ensure all interactions were properly realized

Present learn...and celebrate!

Don't fall in love with the easy idea or your first idea

Don't limit yourself or your scope

See the big picture

Don't get frustrated by change

Work to understand the roles of your teammates so you can see challenges and successes from their point of view



Dept of Education

Fjord Digital Studio

The Federal Department of Education currently hosts eight different platforms – all with different design systems, colours and styles – most with the same users. Fjord was asked to help the Dept of Ed improve the daily experience of its platform users.

KNOWLEDGE CENTER ▾ TRAINING ▾ FINANCIAL AID DELIVERY ▾ TITLE IV PROGRAM ELIGIBILITY ▾ PARTNER CONNECT SERVICES ▾

MH Welcome, Marisol Last Log In: 06/06/2020

Northwestern University – 12345600

Financial Aid Administrator 6 Years in Financial Aid Edit

[COD Online](#) [E-App](#)

[FAA Access](#) [G5](#)

[NSLDS](#) [SAIG Portal](#)

School Notifications

Scheduled System Outages

CURRENT

NSLDS

Start 01/01/2020 at 8:50 AM

End 01/02/2020 at 8:50 AM

UPCOMING

FAA Access

Start 01/01/2020 at 8:50 AM

End 01/02/2020 at 8:50 AM

Important Dates

APRIL 10 Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018

MAY 26 Live Internet Webinar: Correctly Reported Gainful Employment...

JUNE 3 Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018

JULY 14 Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018

School Financials and Operations

Select Award Year 2020 - 2021 2021 - 2022 View School Profile

Direct Loan Pell IASG TEACH

<p>100,000,000 Awards Originated</p> <p>\$1,000,600,000 Total Value of Awards Originated</p>	<p>90,000,000 Funded Disbursements</p> <p>\$1,000,600,000 Total Value of Funded Disbursements</p>	<p>1,000,600,000 Unduplicated Recipients</p> <p>\$90,000,000 Total Net Drawdowns</p>	
Direct Loan	Pell Grant	IASG	TEACH Grant

What's New

Dear Colleague Letter
Posted on 02/11/2020
[Webinar Recordings - New Accreditation Regulations](#)

Implementing Holistic Change

01

Design System

With 8 different systems designed by 8 different companies/teams the Department of Education did not have any consistency.

Our team did an audit of all the systems, components, brand guidelines and data types to create recommendations for a new design system to unify previously siloed teams and sites under a single identity

My Role: Audit existing systems, provide recommendations to design leadership and development, create components for new system, train designers on new system

02

Information Architecture

During the Design System audit we realized that there was no significance to the location of data across the DoE systems.

To improve the overall user experience of the "everyday" portal user, we rebuilt the IA of all the systems from the ground up, created links/access points to connect what could not be moved and a plan to condense all systems into one.

My Role: Journey Map data flows and common task paths, create new IA diagrams and flows for presentation internally and to client, understand data and create links/access points

03

Enterprise Portal Design

The implementation of the new IA began with the design and production of Partner Connect, DoE's newest portal.

Our team combined data from 3 of the 8 sites under an easily understood navigation, removed redundancy and unified all design teams under a single Identity. The first release is going live now.

My Role: Interaction designer – creating pixel perfect screens, lo-fi & mid-fi wireframing, usability testing, **working with developers**, QA testing, client presentations

01 Design System

1. Audited existing platforms
2. Identified common components & data
3. Unified department and previously siloed design teams under single identity
4. Presented recommendations to design leadership, development and client
5. Created new system components & guides
6. Reviewed old screens to find ways to easily integrate new components
7. Trained designers under new system

DESIGN FOUNDATION

Color

Grid

Iconography

Typography

COMPONENTS

Accordions

Alerts

Breadcrumbs

Buttons

Callouts

Cards

Data Visualizations

Form Elements

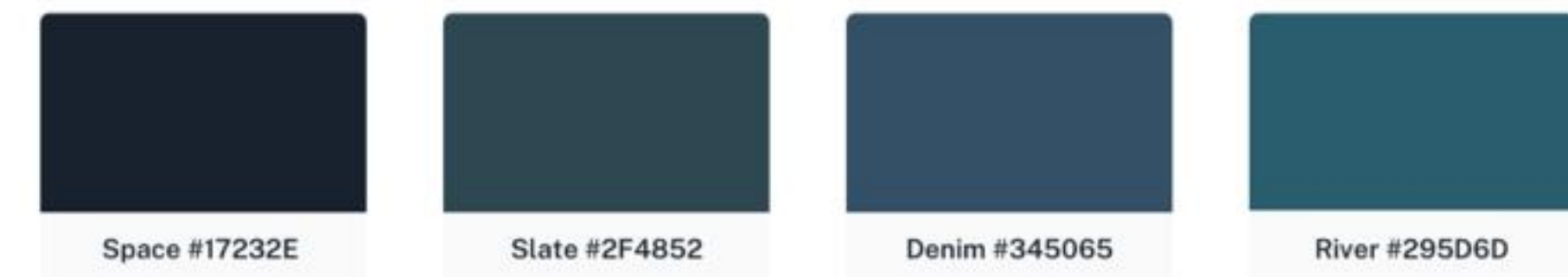
Links

Color

The PPO color palette is adapted from the FSA and DCC guidelines. On the portal, colors are used to assist with visual cues, hierarchy, and to encourage actions.

Primary Colors

Space is used for most typography, such as headings and body copy. Denim and River are used for componentry and decorative elements such as decorative lines that divide content for better readability.



Secondary Colors

Harbor is used for links and alert banners that provide additional information to the user. Shamrock and Sunflower are used sparingly for accent elements, such as iconography or typographic call-outs. Shamrock is used specifically on FSA Handbook while Sunflower is used throughout the rest of FSA Partner Connect screens.



CONTENTS

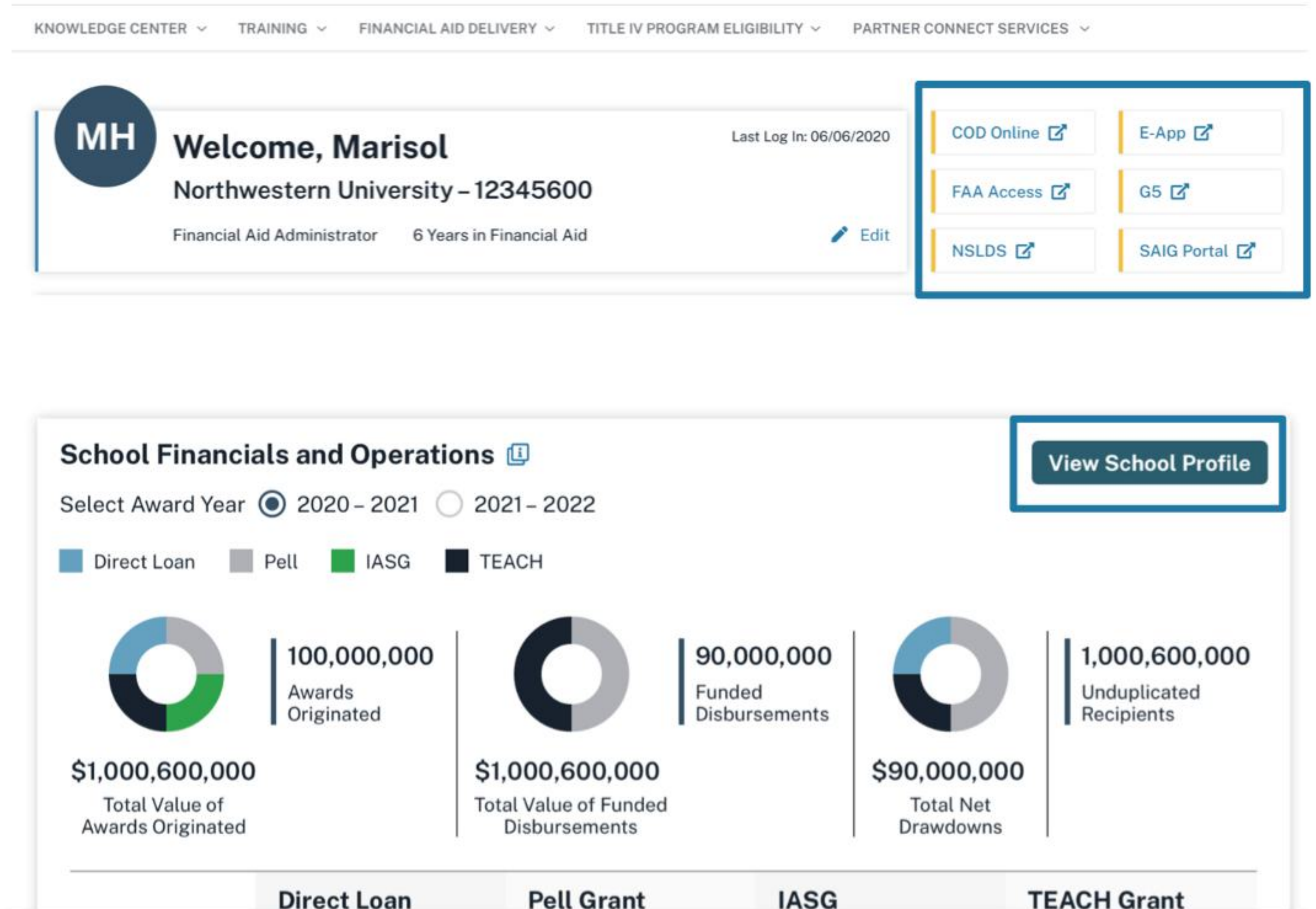
Color

Typography Colors

Color Contrast
Accessibility

02 Information Architecture

1. Journey mapped user flows, data flows and common task paths
2. Used Axure to create new IA diagrams
3. Presented concepts to clients and stakeholders for acceptance and validation
4. Interviewed users to understand data interactions and create links/access points



03 Enterprise Portal Design

1. Designed over 300 screens including unhappy paths and error states
2. Working hand in hand with development to Release 1.0 (including testing and QA)
3. Led retrospective to identify ways to improve design/build/QA processes for 2.0
4. Led charge on increasing client involvement –facilitated co-working sessions and workshops

Options for Search Criteria

You can search by Partner ID, School Name or School Location.

* Partner ID Type * Partner ID
Select ID Type Enter Partner ID

* School Name State Country City
Enter School Name Select State Select Country Enter City

* State City
Select State Enter City

* Country City
Select Country Enter City

Clear Search

You can search by Partner ID, School Name or School Location.

* Partner ID Type * Partner ID
Select ID Type Enter Partner ID

* School Name State City
Enter School Name Select State Enter City

Country City
Select Country Enter City

* State City
Select State Enter City

* Country City
Select Country Enter City

Clear Search

You can search by Partner ID, School Name or School Location.

* Partner ID Type * Partner ID
Select ID Type Enter Partner ID

* School Name Domestic or Foreign State or Country City
Enter School Name Select Option Select State or Country Enter City

* State City
Select State Enter City

* Country City
Select Country Enter City

Clear Search

School Search - Initial

You can search by Partner ID OR by School Name/Location. (*) Indicates Required Fields.

* Partner ID Type * Partner ID
Select ID Type Enter Partner ID

School Name
Enter School Name

Country State City
All Countries Select State Enter City

Clear Search

You can search by Partner ID, School Name or School Location.

* Partner ID Type * Partner ID
Select ID Type Enter Partner ID

* School Name State - Country City - Country
Enter School Name Select State Enter City

* School Name Country - Country City - Country
Enter School Name Select Country Enter City

* State City - Country
Select State Enter City

* Country City - Country
Select Country Enter City

Clear Search

You can search by Partner ID, School Name or School Location.

* Partner ID Type * Partner ID
Select ID Type Enter Partner ID

* School Name Domestic or Foreign State or Country City
Enter School Name Select Option Select State or Country Enter City

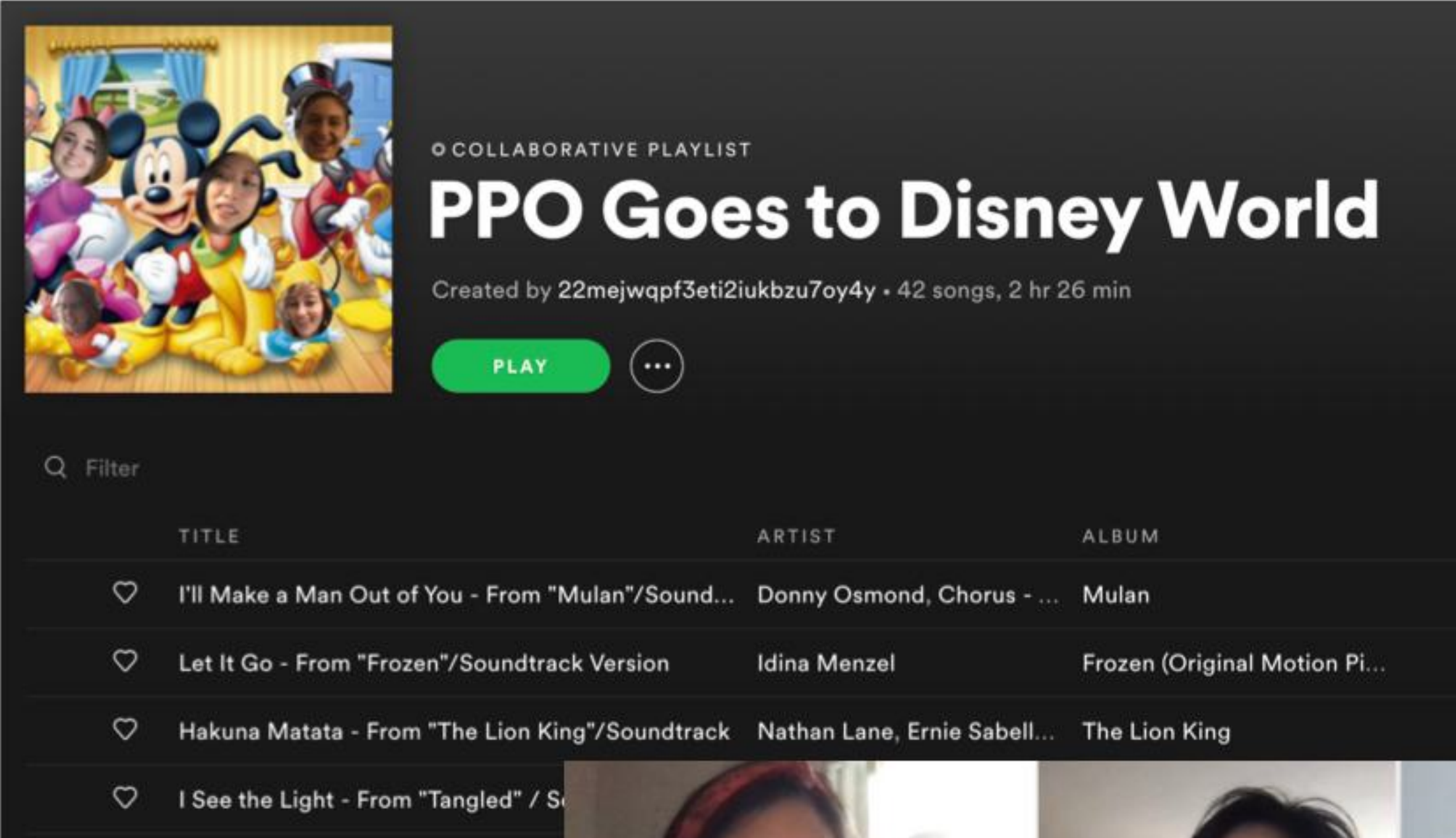
* State City
Select State Enter City

* Country City
Select Country Enter City

Clear Search

04 A Little Extra

- 1. Playlist Parties
- 2. Summer of Fun Captain
- 3. Coffee Chats
- 4. Women's & Middle Eastern ERGs
- 5. Diversity and Inclusion Task Force



COLLABORATIVE PLAYLIST

PPO Goes to Disney World

Created by 22mejqpf3eti2iukbzu7oy4y • 42 songs, 2 hr 26 min

PLAY

Filter

TITLE	ARTIST	ALBUM
♥ I'll Make a Man Out of You - From "Mulan"/Sound...	Donny Osmond, Chorus - ...	Mulan
♥ Let It Go - From "Frozen"/Soundtrack Version	Idina Menzel	Frozen (Original Motion Pi...
♥ Hakuna Matata - From "The Lion King"/Soundtrack	Nathan Lane, Ernie Sabell...	The Lion King
♥ I See the Light - From "Tangled" / S		



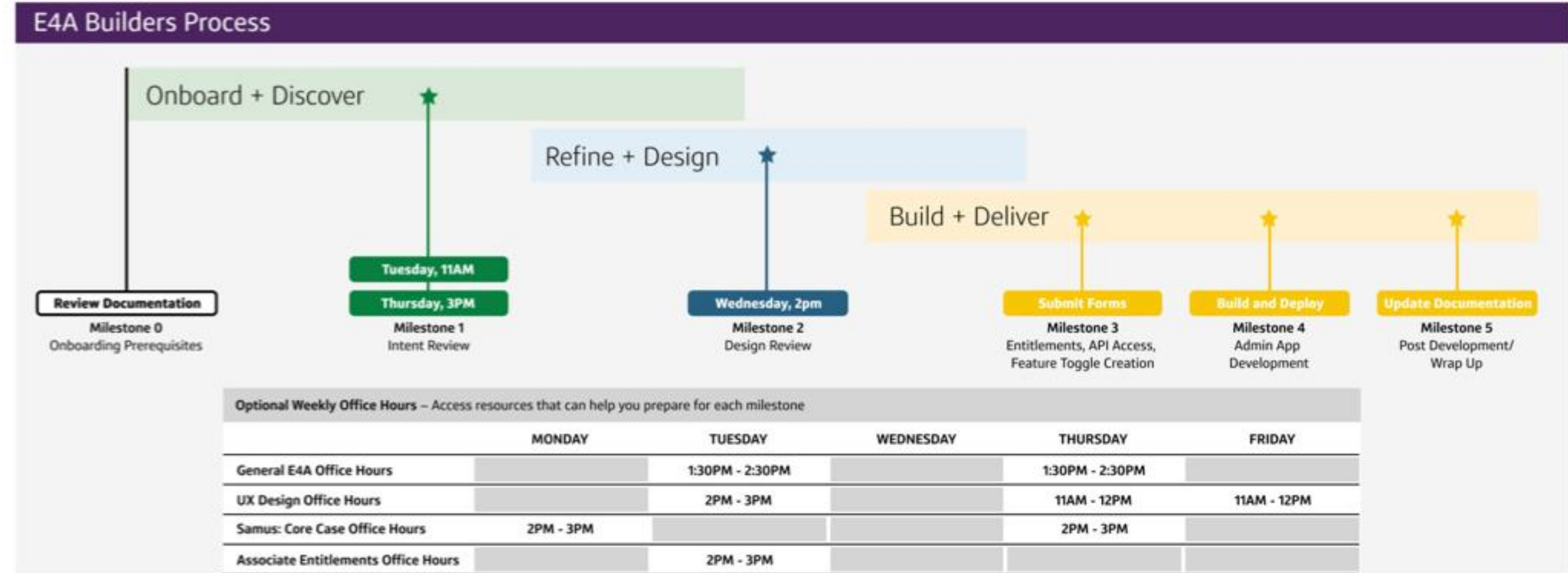
Reimagining the Builder's Process

Capital One

Having separate internal servicing platforms for bank and card accounts, means that if a customer has both bank and card accounts they must speak with 2 different agents to be properly serviced.

To resolve this pain, our team developed a plan to combining the two LOBs which required merging the "Builder's Processes", or the steps for designing and building on each platform.

Welcome to E4A! This page is a breakdown of the key resources and step-by-step process for building on or contributing to E4A.



[Read about the office hours that E4A provides here!](#)

Onboard + Discover

Use the accordions in Milestone 0 to familiarize yourself with the key resources and tasks for building on E4A. Then, discover your path to success —refine your objective and use cases

Goal

- Understand expectations and rules for building on E4A
- Conduct discovery and research intent with stakeholders
- Prepare to present your work to the E4A Core Leads for Milestone 1 approval

In the Onboard and Discover phase you will...

- ✓ | Read through all onboarding documentation
- ✓ | Understand the impact that your feature will have on the E4A experience
- ✓ | Discover what teams will be impacted by your intent and reach out to establish relationships

Goal

- Reach out to ServicingTeamLeads@capitalone.com

Implementing Holistic Change

01

Research

Collaborated with platform team to design and execute quantitative and qualitative discovery research, including: a large scale survey and 15+ empathy interviews.

Our research identified pain points of key stakeholders and established an experience baseline.

My Role: Team & work stream lead - driving creation and completion of design research work including conducting interviews, reviewing survey questions & processing data

02

Process

Transformed data from the research phase into “Key Learnings” which informed creation of “Next Steps”.

Worked with platform team to flesh out, categorize and prioritize each “Next Step” - creating a plan of attack for process improvements that had “buy-in” from entire team.

My Role: Drawing out insights and learnings from data, building relationships to gain buy-in from key stakeholders, creating priority matrix, socializing next steps

03

Design

From the previous stage we had six areas with pain points and potential for improvement - in this stage we ran design thinking workshops to brainstorm solutions for each area.

We voted to select which solutions the team was most interested in pursuing and began executing.

My Role: I owned the design of four of the six pain point areas, executed on our solutions and provided guidance and reviews to teams handling the other two areas

04

Release

At the beginning of April 2022, we released the first stage of the new Builder’s Process for consumption (this stage contained ~85% of the identified improvements).

With updated resources, a clarified process, and new ceremonies, partners were immediately excited.

My Role: Leading a “Lunch and Learn” about the new process to begin the education of builders, drafting communications and acting as POC for questions/issues

01 Research

1. Fought for opportunity to conduct full scale research engagement
2. Built survey
3. Designed research guide and conducted interviews
4. Performed data synthesis

EASE for Associates Product, Design & Development Teams Survey

sydney.marcus@capitalone.com (not shared) [Switch account](#)

Getting Set Up

The following questions will focus on getting set up to develop on EASE for Associates

I feel that

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	I didn't use this
It was hard to get the app running locally	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Running tests was easy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

About how long did it take

Choose

	1	2	3	4	5	6	7	8
I was introduced to E4A by a contact		x		x	x	x		x
I had to return to IR	x		x		x			x
E4A team should provide guidance in IR or in some kind of "forum"/collab	x		x		x			
I am not clear on how much I need to know before attending IR	x		x		x	x		
I would have to go through the process multiple times to be confident	x	x	x		x			
I didn't know the right person to start with / didn't know the right person to reach out to	x	x	x					
Good feedback and support from design								x
The process was hard to understand	x	x	x					
We don't have a good sense of what E4A is, how it works and what we can/cannot do	x	x	x			x		
Intake form jarring or unclear	x		x			x		
I had to wait 2-3 weeks to get an IR appointment	x	x						
I thought IR was the starting point	x		x	x				
I didn't have any resources (written or people)	x	x	x	x				
IR went smoothly				x	x	x		x
"Process makes sense to me"				x	x			x
Missing Key Knowledge	x		x			x		
I approached IR from a "brainstorm" perspective	x		x				x	
Failed the meeting because we didn't have answers to E4A questions	x				x			
Lack of knowledge around entitlements	x			x		x		
Success when reached out to E4A team members in advance of IR	x					x		

02 Process

1. Transformed research data into “Key Learnings” and “Next Steps”
2. Collaborated with team to prioritize (matrix LOE vs. priority)
3. Shared out data and learnings to gain buy-in from entire team

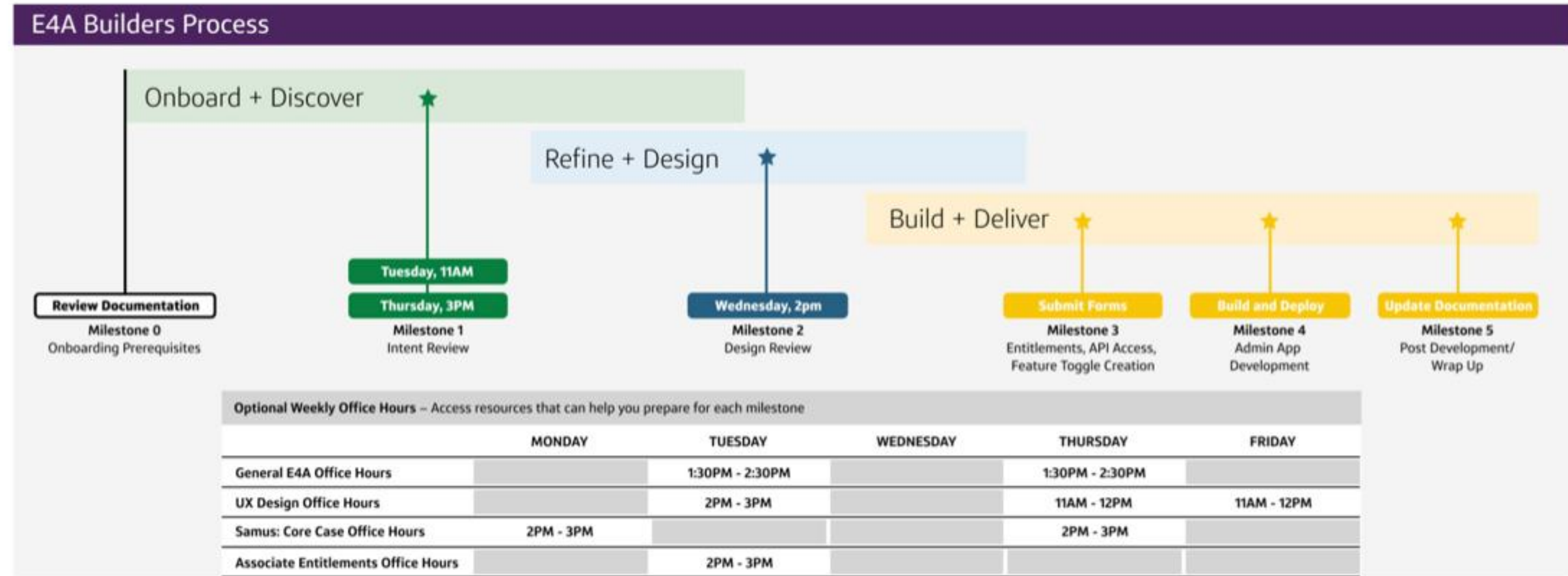
Key Learnings and Actions from Builder Interviews

1. The majority of partners (9/13) are being introduced to the E4A process via an existing relationship with an E4A team member. Since guidance is coming from individuals vs. a standard resource, each partner is being directed in a different way and is given different resources
 - a. QW: Starting Page Updates
 - i. Edit and improve “consumability” of current starting page
 - ii. Need to make starting page more omni-present and accessible (consider monthly slack-bot reminder of key resources and/or adding key resources to slack channel descriptions)
 - iii. Elevate and clarify definition of done checklist
 - b. LTA: Create equality by moving away from fielding questions one-off via chat, move towards directing builders to a single page with all starting resources
2. Most partners (8/13) had to return to IR multiple times
 - a. LTA: Need to track number of teams that have to return after QW adjustments
 - i. Quantitative - how many teams had to return?
 - ii. Qualitative - why are teams returning / not-returning after changes?
3. About 50% of partners (7/13) asked for some kind of “forum” or “collaboration session” with core E4A team members
 - a. QW: Utilize the existing E4A office hours ritual to satisfy the desire for a

03 Design

1. Created and led Design Thinking / Brainstorming workshop
2. Executed on design solutions for four of the six improvement areas:
 - Establishing new ceremony: Design Review
 - New Confluence Resource page with visual representation of process, updated links and more
 - Updated Intent Review ceremony
 - Improved internal resources and expectations

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- ✓ | Discover what teams will be impacted by your intent and reach out to establish relationships

Goal

- Reach out to ServicingTeamLeads@capitalone.com

04 Release

1. Launched improvements
2. Led “Lunch and Learn” to introduce builders to updates
3. Drafted communications and acted as POC for questions/issues



Improving the E4A Builder's Process

BTS Design Team

Sydney Marcus

March 1, 2022

Thank you