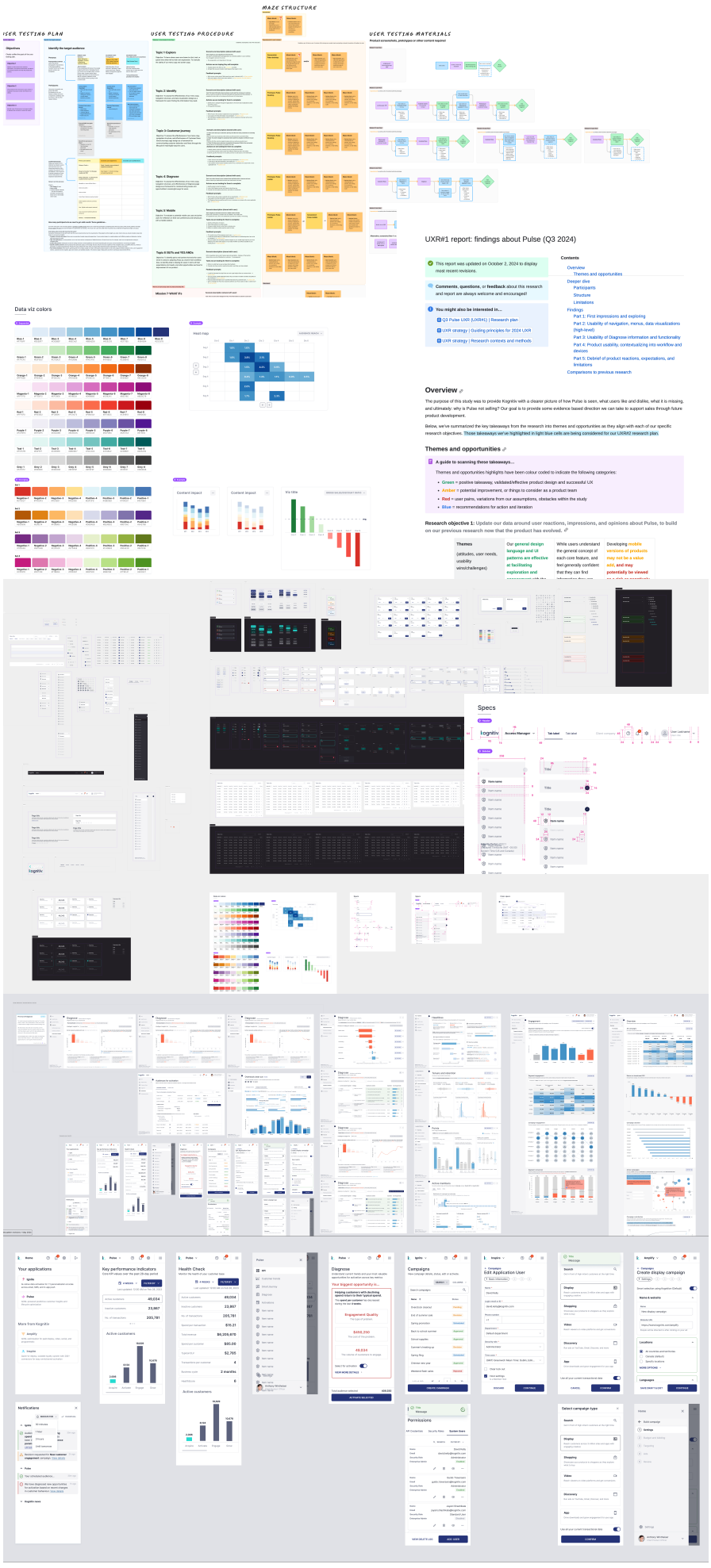
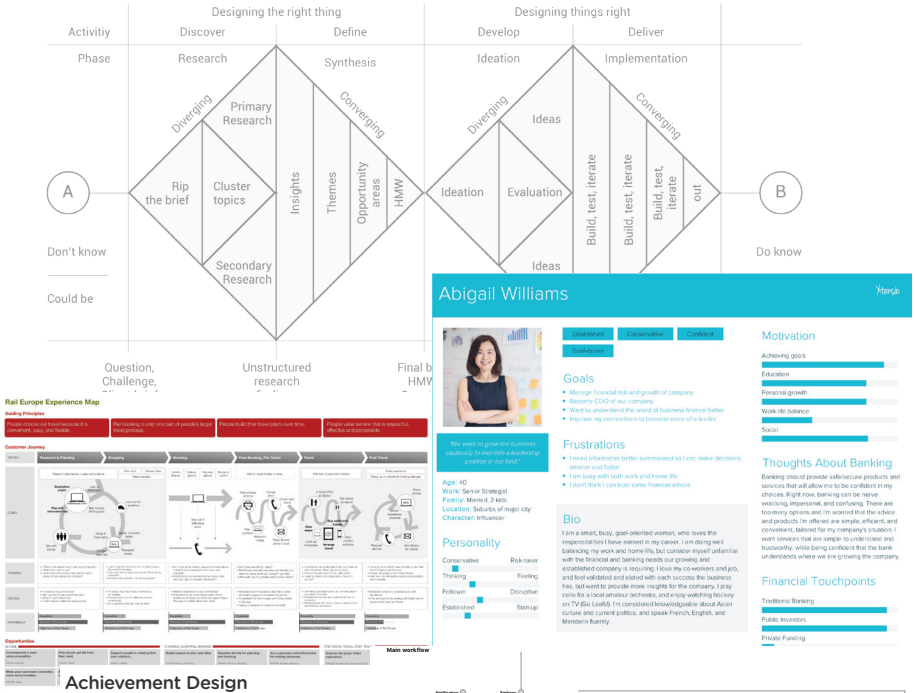


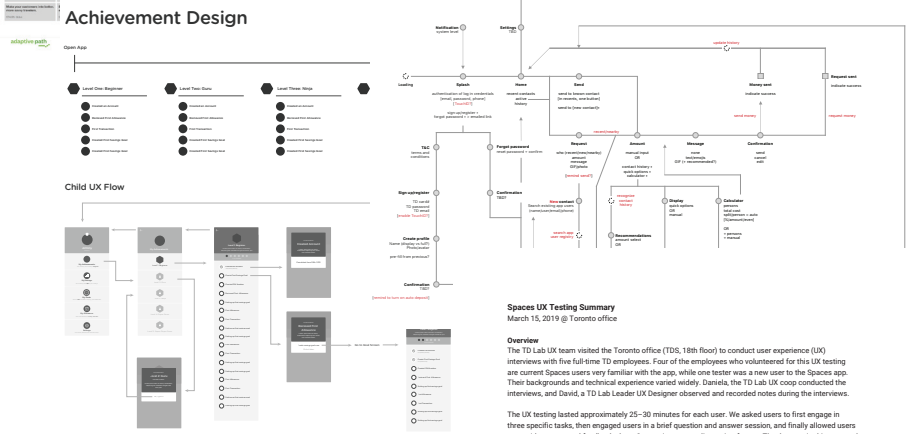
Welcome to my updated 2025 portfolio. This page will introduce you to the way I think about design, using examples that represent my strategic leadership, hands-on design work, research methodologies, and design system thinking from **2022–2025** as Director of Design.

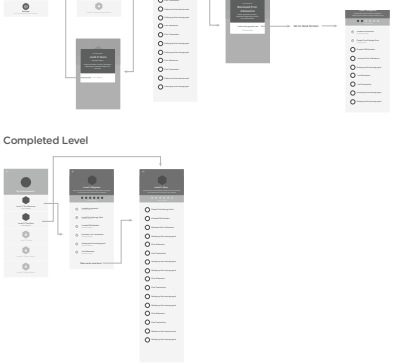
UX research helps quantify and identify gaps in expectations and functionality of a design. It validates all of the other work done in the first half of designing. The summarized findings form a demonstrable foundation to move forward (or iterate) a design and can be used by stakeholders across an organization as evidence for moving a product in a specific direction. My UX research methodologies are meticulously planned and follow best design practice processes to ensure that what we learn is quantified and actionable.

Design systems create a consistent UX/UI across a suite of a company's products to build trust, eliminate an end user needing to learn new patterns, and provides developers and Product Managers a standard UI/UX library of components and flows to develop products for all use cases. The best planned design systems are built to accommodate every current need, and are designed to use components that illustrate every potential state of interaction in a design so that engineers have the specifications and states to build the right UI. This design library was used across **five** distinct products, data analytics panels, and was robust enough to only need small additions over three years of use, development work, and client requests.

Design & Problem Solving. Solving design opportunities for a wide range of end users in a suite of products that need to be responsive, easy to understand, and allow users to efficiently understand information and act on critical data points is another aspect of what I do as a designer and design manager. Design leadership means helping UXR team members ask the right questions. Designing a best-in-class user experience means using qualitative and quantitative data and a design methodology to create things to help users do their job. The AI-native customer insight and campaign activation award-winning products I designed allowed CMOs and campaign marketing managers to target customized loyalty offers to **230,000,000 end users** in the global retail space.







Spaces UX Testing Summary
March 15, 2019 @ Toronto office

Overview
The TD Lab UX team visited the Toronto office (TDS, 18th floor) to conduct user experience (UX) interviews with five full-time TD employees. Four of the employees who volunteered for this UX testing are current Spaces users very familiar with the app, while one tester was a new user to the Spaces app. Their backgrounds and technical experience varied widely. Daniela, the TD Lab UX coop conducted the interviews, and David, a TD Lab Leader UX Designer observed and recorded notes during the interviews.

The UX testing lasted approximately 25–30 minutes for each user. We asked users to first engage in three specific tasks, then engaged users in a brief question and answer session, and finally allowed users to provide any general feedback about Spaces in an open discussion format. The three main things tested in the first part of the UX testing were:

1. The new design pattern for providing Help/FAQ to users
2. The new find-a-colleague feature
3. The new search and favourite a colleague feature

Summary/Key Findings
The following are the critical findings across all/most of the user testing sessions, related to the three things we tested:

- All users wanted to be able to book a room while using Spaces
- All users found the app more useful with the find-a-colleague feature implemented
- All of the users found that the "in X minutes" functionality of the request a meeting feature did not align with their daily office scheduling (see Details, below)
- All users found the revised design of the search function very useful, especially for finding colleagues
- All users found the favouriting feature very useful, and used it in common ways
- All users easily accomplished all tasks they were asked to perform, even if it was a new feature/flow

General Findings
The following list highlights some of the more general comments about the Spaces experience:

- Most users would like the app to provide a faster way of showing a map of the current floor they are on for "wayfinding" or "orientation" purposes

DISCOVER

DEFINE

Startup/Small Business Banking "SIMBA"

Research (discover) followed by synthesis (define) allows us to design the right thing.

Observation

We observed and recorded what the business landscapes, people, environments, and existing solutions common to startups in the Waterloo region looked like. We reviewed what similar startup environments exist in other places, and compared those to our region. We generally focused our efforts on technology startups. We relied on past behaviour studies and banking data to understand what the financial journeys look like for these businesses at many stages of a company's evolution.

Technology startups in many regions are characterised by similar patterns of regulatory and financial needs, and share a common mental and workplace culture. Our solution could be broad enough to encompass more than just Ontario, and/or technology-based startups.

Empathy Interviews

The UX team conducted a number of 45–60 minute empathy interviews over the course of a few weeks. Our goal was to listen to stories from our target audience to understand their needs and desires in a qualitative way. We identified key emotions through a analysis of a person's words, body language, behavioural patterns, and engagement during the interviews. We ranked key words on a 15-step positive-negative linear scale, and then clustered all of the emotional words into six key categories that influence our guiding design principles.

Startup founders share many common and deeply emotional feelings towards what they are doing. They can be amazingly positive (elated, excited), neutral (ambivalent, disconnect), and extremely negative (terrifying, frustrating, disheartening). Our opportunity should be geared to bringing the positive emotional words towards financial process and interactions, to better provide success to startups and new business ventures.

Research

Our initial research into startup and small business banking was wide-ranging. We broke down the project brief into specific sections. We explored current TD and competitor offerings for business banking. We looked into the landscape of individual/component solutions for startups to use during their initial stages of growth. We also reviewed the regulatory requirements for starting a business in Ontario, in terms of both government and legal processes to better understand the stages of a customer's journey, and associated pain points.

The current landscape is confusing, difficult and slow to navigate, inefficient, and with a lack of guidance and information. We think there are many opportunities to move into a leadership space for these customers.

Our Insights

As expected, the entrepreneurs and people who are engaged in a startup environment tend to be passionate, enthusiastic, and driven by common feeling of independence, freedom, and wanting to make an impact. They were able to articulate specific **Desires**, **Succes**, **Process**, and **Learning** needs clearly. We were surprised by the amount of strong negative feelings towards the areas of banking/financial and regulatory process. Lack of **Connections**, and a feeling of disconnected and impersonal relationships with banks was commonly identified.

Common Themes

Approximately 75% of the emotional keywords we discovered during empathy interviews tied closely to one of six common themes. These themes are: Process, Desire, Success, Learning, Connection, and Uncertainty. The majority of the remaining 25% were identified as falling between one of two axis: Learning-Process, or Learning-Connection-Uncertainty. The frequent re-use of emotional words among the different empathy interview participants validated our clustering of theme, and a number of design opportunities to explore.

Many Opportunities

We have a wide range of opportunities to address customers in our startup and small business banking space. We need to consider how we help startups become part of a community of like-minded and understanding people to form great relationships. We need to provide transparent, honest advice in simple language. We can provide guidance and information along a startup's journey over a number of years and key stages of their growth, to help them anticipate their needs. We should provide efficient, seamless processes and products, to allow our customers to focus on their business and meet their specific needs.

The Problem Statement

How might we provide more efficient processes for start-ups to better understand each stage of a business journey to experience positive successes during each step?

Every design follows a design process

I take every design through the same design process. The goal is to make sure as a designer I understand the problem first, before designing a solution. The process may be modified based on various constraints, but it is important to make sure each step is considered and understood.

The process is deeply human-centric, and consists of empathy and observation where we gather qualitative and quantitative information. This is synthesized into a problem statement the entire team agrees on via insights, clustering, theming and identifying opportunities. I use many tools to help in these stages: customer journey maps, personas, competitive and trend analysis, empathy interviews, and many more.

At this point I often produce a summary of the design thinking to date, to engage various stakeholders across an organization, and to align on measures of success.

The next step uses design workshops and ideation exercises to understand and expand on what might solve the problem, design and test workflows that could fulfill the user's needs, and question assumptions that have been brought into the process. This is an exploration of what might work and should be introduce big ideas into the team's thinking.

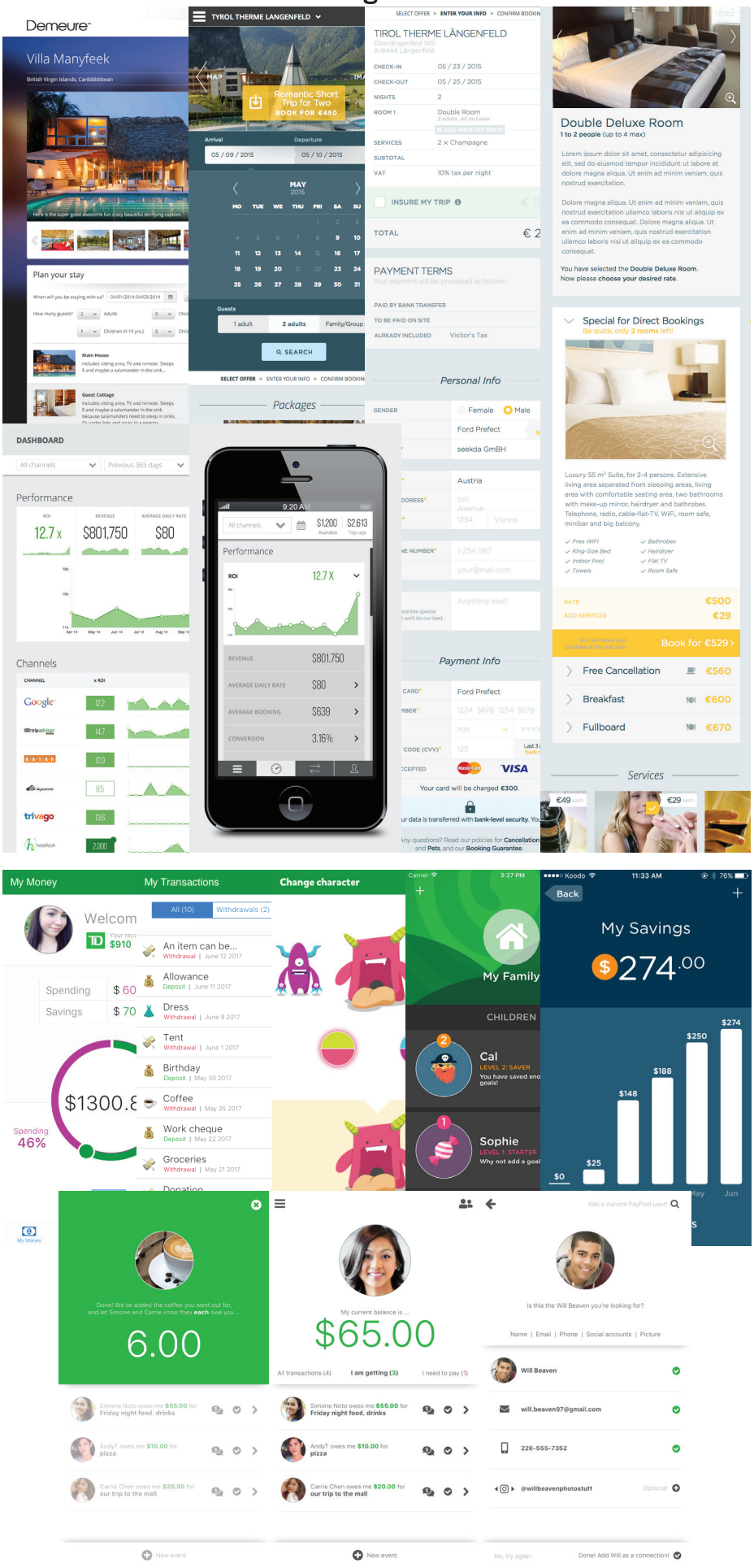
Out of ideation comes answers. I identify opportunities, use the problem statement as a lens to measure and validate the potential thoughts against, and start creating simple wireframes to validate workflows and ideas.

The final step? Design build, test, iterate. Over and over until your design addresses that user-centric problem statement and then you release it to your users.

And begin updating your designs to steadily improve your user's experiences, or start from the beginning and defining a new problem statement that will make the user even more delighted.

The following pages highlight some of the mobile designs I've created since 2013. They show a range of visual examples of my work, and then offers examples of successful problem solving, showing workflows and UX patterns that greatly improved a user's product experience.

website ... **mobile redesign**



Visual examples

These designs illustrate some of the mobile design work I have done since 2013 in my previous three roles. These are intended to simply showcase the range of visual design styles I have created, depending on the needs of the end user.

I would be happy to explain my role, and the customer experience and business goals for any of them.

Seekda/Kognitiv (2013 – 2016)

A major player in the accommodation space globally, and sole Google partner in the reservation field.

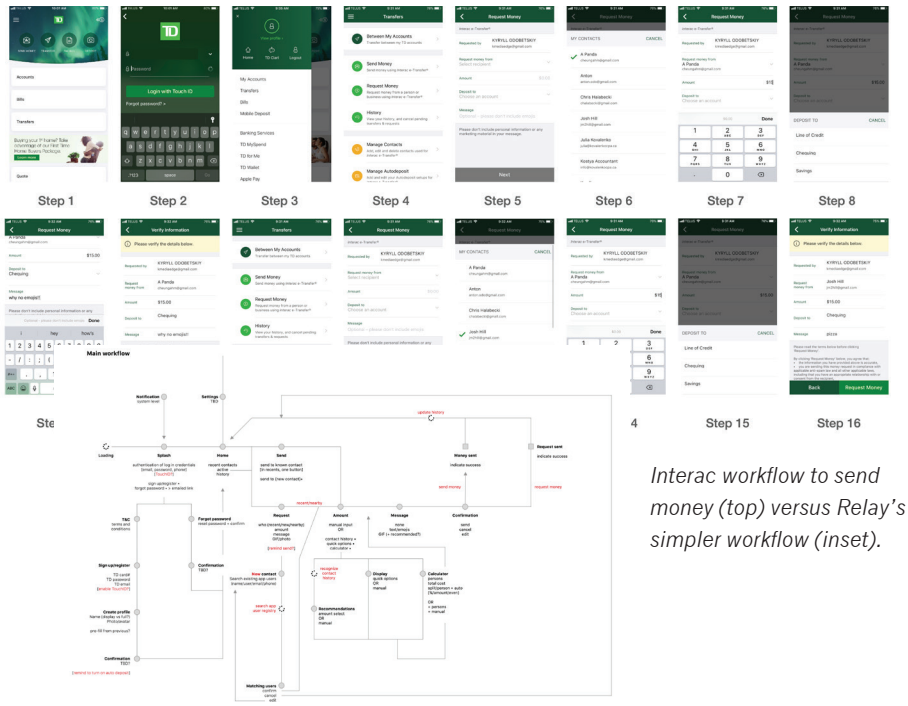
The challenge here was that the company operated in Europe, Latin and North America, and required designing for multiple languages and cultures, and many different user personas (hotel customers, staff, management teams). Each design needed intensive insight research into customer journeys to produce workflows that made complex tasks as easy to understand and efficient as possible in the mobile space (website shown on left, mobile redesigns on right).

The primary goal of much of the work was to simplify down complex user needs and interactions (hotel managements software, for example) into easy to use mobile solutions, so that key information and action points were displayed regardless of user's location or screen size, that could be attended to using more complex applications at a later time.

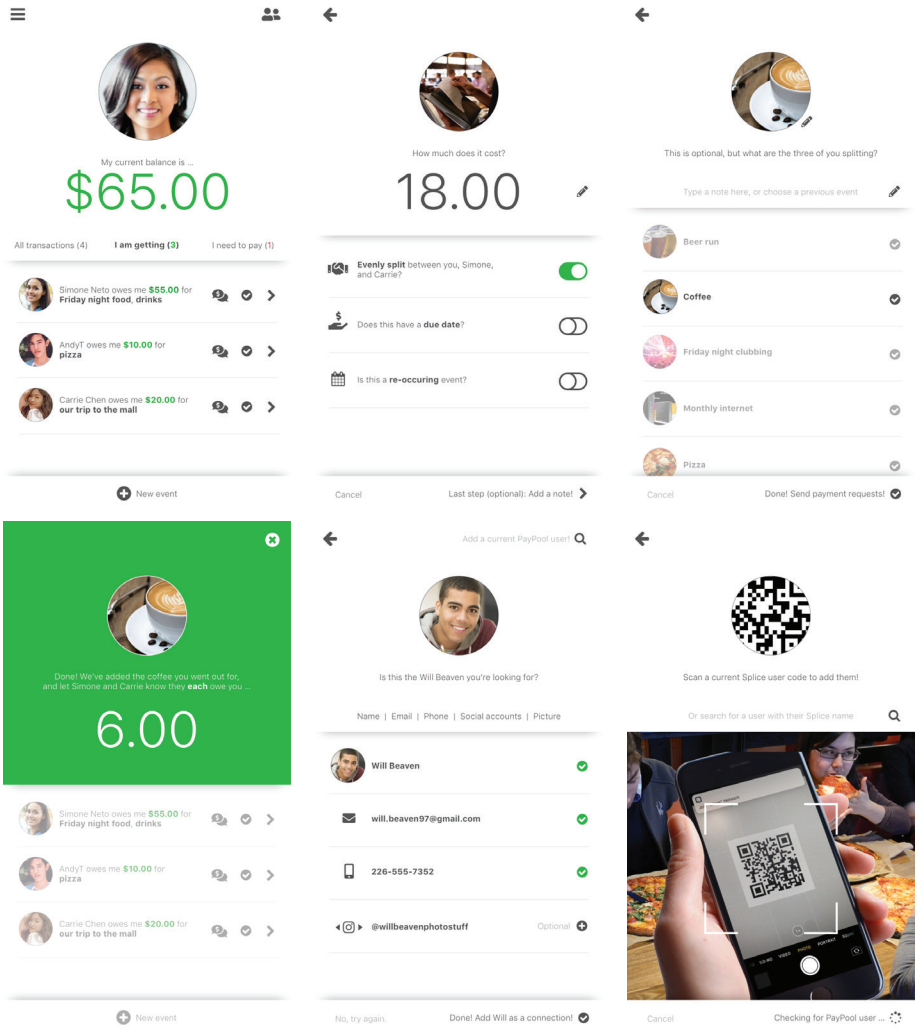
TD Labs (2016 – 2019)

As the Lead UX Designer at TD Lab, I played a key role leading solutions exploration, design, to rapidly bringing new solution concepts to customers as in-market betas, facilitate design thinking workshops and ideation sessions, mentor and educate university UX coop students, and to pass along key learnings, research, and new designs to the TD organization.

I helped deliver some 150+ prototypes and beta designs to TD during my tenure. Designs included banking apps for kids, digital financial literacy applications for children and families, new small business line applications in the entrepreneur space, new ways of transferring money, and digital experiences for background and in-house teams.



Interac workflow to send money (top) versus Relay's simpler workflow (inset).



Screenshots showing the core Relay experience. A simple homepage to track money you owe and money owed to you. Fun ways to ask for and transfer money. Multiple, fast methods of adding a new user to Relay.

Problem solving

Why does it take two-and-a-half minutes to send $15 to new coworker to pay for a pizza you split at lunch? Why is the average Interac transaction nearly $360 versus $20 for Venmo? Why is Venmo used by the majority of under-25s in the US? Why is Swish (Sweden) used by more than 50% of the population?

At TD Lab, I helped lead efforts to understand the pain-points that Gen-Z feels when trying to split money, share bills, and transfer small amounts of cash between each other. How do we make transfer of money between people less complex, less institutional, and far more fun to do?

Money transfer made easy (aka Relay)

Small payments for Gen-Z are a core experience of their lives. In the US, this group uses *Venmo* (and *Square Cash*) to pay for everything: food, utilities, transportation, entertainment. In Sweden, *Swish* (jointly created by the six central banks) is used by more than 50% of the population to transfer money to other people, replacing the banks in-house money transfer processes. For small transactions, people are forced to use cash, or keep track of monies owed or owing via an array of inconvenient ways.

I helped research the current money transfer space, and the details and types of transactions that take place. I developed scope documents to keep the project on target. I measured how Interac compares to other existing solutions, and also payment systems *coming* to Canada like Apple Pay (via Message). What are Venmo and Swish used for versus Interac.

This lead to the design of a project code-named Relay. A simple solution that addresses all of the key concerns and problems with Interac, while giving users incredible flexibility and a fun experience that encourages retention, growth, and excitement. The entire workflow was built from the ground up to provide a user friendly, fast, and fun way to send money.

Relay's initial feedback testing with users demonstrated a very high level of engagement and use, and positive feedback among the intended target audience. It reduced the time to send money by more than 80%, and was introduced to stakeholders in TD in the summer of 2019.