



Miguel Ángel Pérez

Design Leadership, Research, and Technology

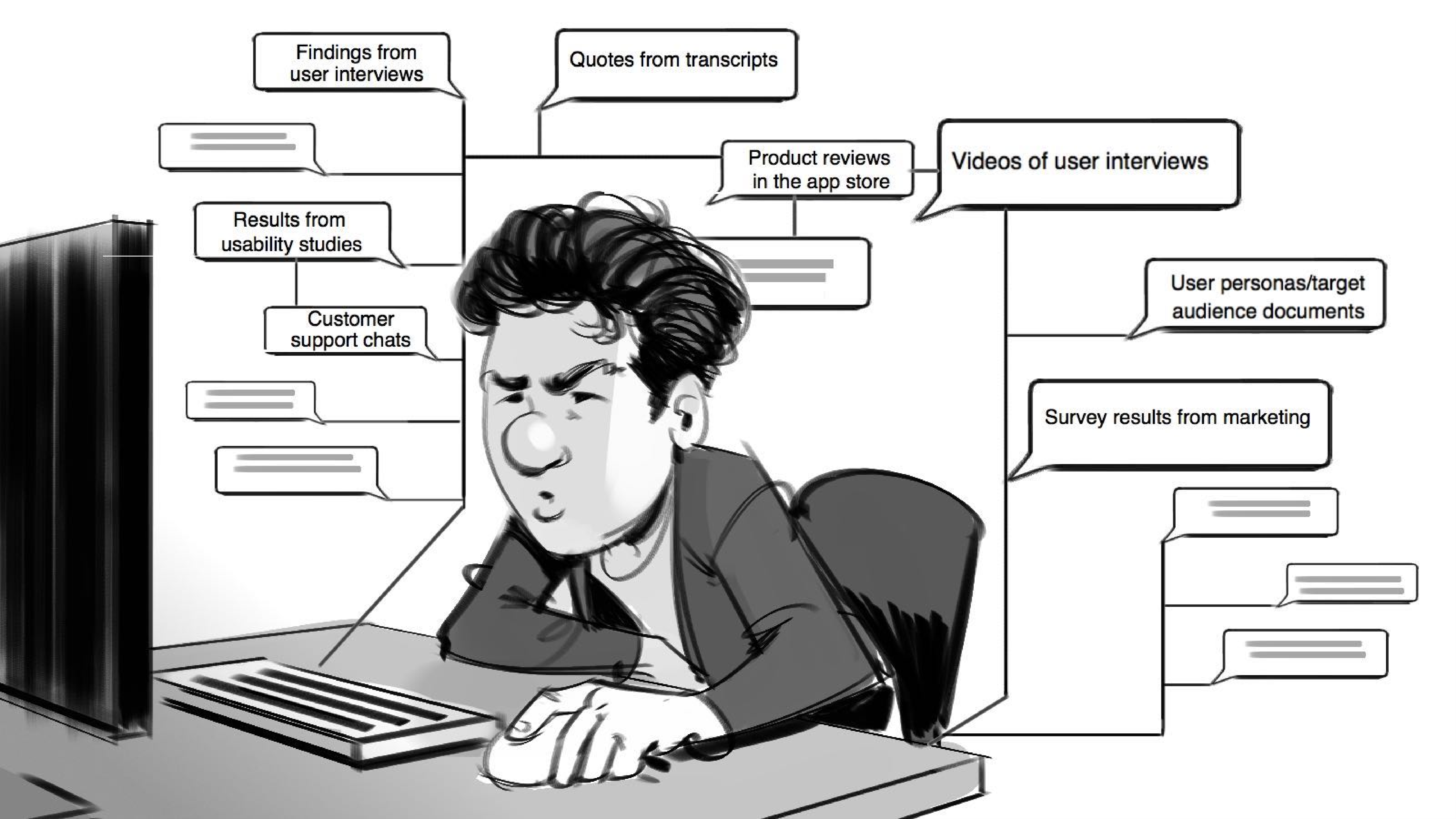
Whether a team is striving to achieve product-market fit, expedite design research, or facilitate sprints and run A/B tests, Miguel helps teams skillfully navigate into the unknown by surfacing people's shared, hidden reserves of creativity and compassion.

Miguel has worked on products and services ranging from B2B healthcare technology to DTC hardware for pets. Since his days developing games as a teenager, Miguel's worn different hats on tech-enabled teams for more than a dozen years. He combines expertise in design research, software development, and data-driven strategy to offer just right engagement for teams of all types and sizes. Miguel uses his background in software engineering to develop tools like SmoothState.js, Nuggetizer, and Affinitizer, which aim to accelerate the pace and adoption of Human-centered Design.



NLP for UX Research

Generating empirical qualitative insights from conversation data



Findings from user interviews

Quotes from transcripts

Product reviews in the app store

Videos of user interviews

Results from usability studies

Customer support chats

User personas/target audience documents

Survey results from marketing

6146... > Guest A > 12:16 - 14:59





HOST A


Were there, were there instances where you were presenting out on your findings and it was just, you know, not being heard or was it such that the timing was so bad that you just didn't feel like it was even the right time to bring up what you've learned?


GUEST A


Yeah. I mean, I think it's a combination of things. Some are, which are my fault and some of which, you know, are the contexts, the things that are my fault for sure are maybe the way in which I presented findings. I think my, my thinking was there's a lot of disagreements with the, with the leadership team. And if I put everybody in a room, it, it, it could lead to things being dismissed. Another, you know, just big meeting. Like I just measured the risks as being greater than the rewards of a group meeting. And so I basically presented my findings individually and I just did it like really friendly, like really casually rather than formally. And I think that looking back in hindsight was a mistake. I think that it would have been a big, a big meeting and by big, I mean, you know, eight to 10 people in the room, you know, that would be our leadership team. And maybe some of the minor managers.

 Apply Experience Design across the board because UX researchers deal with people problems, and people's lives change when we get involved in a significant way. 6146... > Guest A > 9:10 - 9:33

 Notice our team is twiddling their thumbs and feeling bored and anxious as 90 % of the team that was on the road pre-pandemic are now putting their multimillion-dollar engagements on hold. 6146... > Guest A > 11:28 - 12:15

 Wish we were able to do a version 2 or re-engage people for the HR-focused qualitative study because the internal research still has value but our efforts were washed out due to the pandemic. 6146... > Guest A > 12:14 - 12:20

 Decide not to present my findings in a group meeting because putting everyone in a room might lead to disagreements within the leadership team and things being dismissed. 6146... > Guest A > 13:21 - 14:17

 Realize in hindsight it was a mistake to present my findings to stakeholders individually rather than in a big meeting as individual meetings are casual and informal 6146... > Guest A > 14:17 - 14:59

What

I realize in hindsight it was a mistake to present my findings to stakeholders individually rather than in a big meeting

Why




... as individual meetings are casual and informal

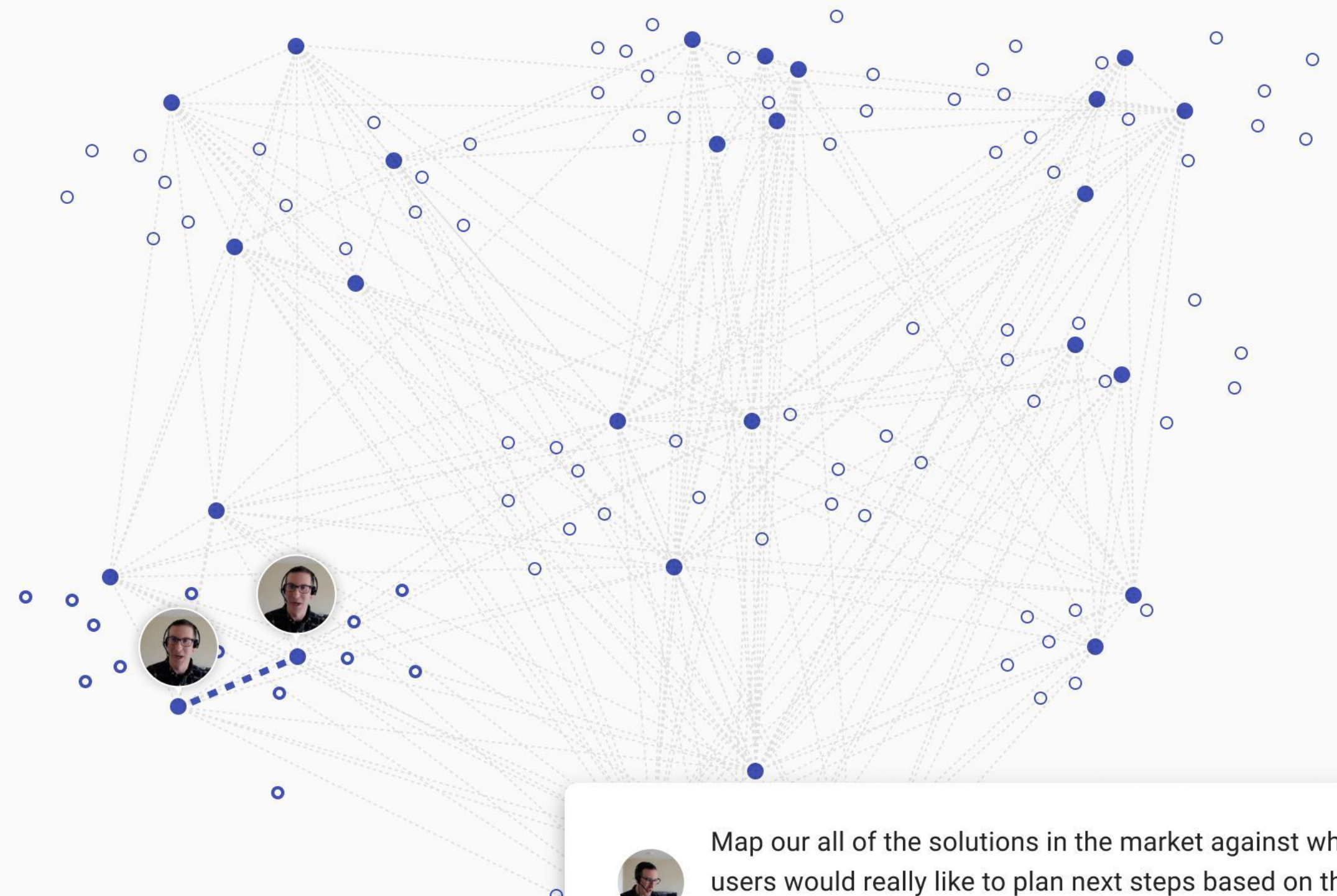
- because the rewards were greater than the risks of a group meeting
- as individual meetings are casual and informal
- because I need the whole leadership team to consider my findings together


Nuggetizer Export

Profile	Summary	Task	Goal	Quote	Prompt	Type	Clip
Across Time-Zones	Analyze participant responses after the session by tagging and cleaning	Identify themes by analyzing research data	Uncover findings through qualitative data analysis	I have like a Goo	"When you were Inner Reasoning	recdysm8VebN0QKdQ_b	
Across Time-Zones	Feel frustrated that the timeline stretched on too long between finaliz	Address pain points in my own and my team's workflow	Help my team function at its best	Like not totally t	I'm curious abou Emotional React	rec8jrov2kyndFP4f_blur	
Across Time-Zones	Prepare for a session by reviewing the moderator guide and the resear	Get in the flow of interviewing so I can adapt and dig deeper as needed	Facilitate sessions with users to understand their experiences	So, you know, ju	"Thinking back a Inner Reasoning	recx8cLow8KpED97f_blu	
Across Time-Zones	Prepare for a session by making sure I know how the interview will flo	Get in the flow of interviewing so I can adapt and dig deeper as needed	Facilitate sessions with users to understand their experiences	So making sure I	"What'd you do Inner Reasoning	recxQcospQ9FkwDZ_bk	
Across Time-Zones	Come up with questions for the moderator guide and get feedback fro	Check in with my team members to ensure we are aligned	Orient everyone to what's been learned from research with users	I had created thi	And where did ti Inner Reasoning	rec8zFn08KRBTvfeA_bk	
Across Time-Zones	Document research plans and share them with the whole team, so the	Check in with my team members to ensure we are aligned	Orient everyone to what's been learned from research with users	And those that c	"And aside from Guiding Principi	recpEKIQa7gFDLumz_bk	
Across Time-Zones	Adjust the flow of interviews based on my self-assessment of how the	Get in the flow of interviewing so I can adapt and dig deeper as needed	Facilitate sessions with users to understand their experiences	Yeah, I feel like t	"Once you got in Guiding Principi	recgy5anrWD4bCL8_blu	
Across Time-Zones	Feel relieved that after self-reflecting about my first session with users	Get in the flow of interviewing so I can adapt and dig deeper as needed	Facilitate sessions with users to understand their experiences	A little bit of like	"Once you got in Emotional React	rectQjduo7tY02rv_bkurr	
Across Time-Zones	Collaborate with stakeholders who are in different time zones by askin	Check in with my team members to ensure we are aligned	Orient everyone to what's been learned from research with users	So I live in Japan	Is there anything Inner Reasoning	recw8wlo45WRCzavr_bk	
Across Time-Zones	Write a report that can live forever on our internal research blog by th	Organize knowledge gleaned in various ways across the company	Make information easier to reference and share	So the job really	"You had mentio Guiding Principi	recx0Cryd5m01ync8_bk	
Across Time-Zones	Respond to comments and questions on my slide decks from other res	Organize knowledge gleaned in various ways across the company	Make information easier to reference and share	And, or like, the	"And have you e Inner Reasoning	reclU9yrT4VFpUrWW_bk	
Across Time-Zones	Help a PM in a different location working on a project related to my pa	Organize knowledge gleaned in various ways across the company	Make information easier to reference and share	Most recently i g	"And are those c Inner Reasoning	recgoQzjs04U4Ew8_bkurr	
Across Time-Zones	Search for research related to an initiative I'm working on to see what	Organize knowledge gleaned in various ways across the company	Make information easier to reference and share	I search for stuff	"Like, how did y Inner Reasoning	recPF75MB65WUjUE_bk	
Across Time-Zones	Answer questions about research I did years ago by browsing categori	Organize knowledge gleaned in various ways across the company	Make information easier to reference and share	so people might	"Like, how did y Inner Reasoning	recpws7NnsrnFatEp_blu	
Across Time-Zones	Scan through research that's newly published to the company blog, ev	Deepen my understanding of UX research and design	Learn and grow as a UX professional	I mentioned tha	"Like, how did y Inner Reasoning	recNvInveA2eV5vbG_bk	
Across Time-Zones	Search for a specific topic in a research report using the keyboard shor	Organize knowledge gleaned in various ways across the company	Make information easier to reference and share	Yeah, it [how I w	"And is that like Inner Reasoning	recx55m5lq2v2o3AD_bk	
Across Time-Zones	Outline what we plan to learn and how, with a research overview for e	Prepare questions for guiding interview sessions	Facilitate sessions with users to understand their experiences	So, I mean, for e	"And aside from Guiding Principi	rec7SjeEnY13mJ4e_bkurr	
Across Time-Zones	Combine two sets of questions into one session to both address gener	Prepare questions for guiding interview sessions	Facilitate sessions with users to understand their experiences	And so we had o	"You mentioned Inner Reasoning	reclUWyfwidNCKohm_bk	
Across Time-Zones	Review my notes right after sessions to clean up mistakes	Organize session notes and assets so they can be easily referenced later	Make information easier to reference and share	Immediately aft	Is there anything Inner Reasoning	recpVSELYRwGD1LA_bk	
Across Time-Zones	Bounce ideas off others for rephrasing, reordering, or drilling in on car	Prepare questions for guiding interview sessions	Facilitate sessions with users to understand their experiences	And I've done th	"So curious, wh Guiding Principi	reclQHppjmak9PMU_bk	
Across Time-Zones	Edit my notes after sessions to make them more readable	Organize session notes and assets so they can be easily referenced later	Make information easier to reference and share	Notes during the	And help me uni Inner Reasoning	reco2tb0Wav3b12Ev_bk	
Across Time-Zones	Organize my interview notes so that I can easily go back and make sen	Organize session notes and assets so they can be easily referenced later	Make information easier to reference and share	So just making s	And help me uni Inner Reasoning	rec5AadTTye0HvXv_bk	
Across Time-Zones	Share compelling videos of participants in my slide deck if they nicely i	Quote users to illustrate research findings	Deliver compelling research findings to stakeholders	It [the slide deck	"I'm curious tha Inner Reasoning	rec4ox8sXVqjw8Y7_blu	
Across Time-Zones	Deliver two slide decks when reporting important research: one to use	Communicate strategically according to the context and audience	Deliver compelling research findings to stakeholders	And yeah, some	"I'm curious tha Guiding Principi	rec80nLbw08CjHX7s_bk	
Across Time-Zones	Speak the language of the designers I work with when sharing resear	Communicate strategically according to the context and audience	Deliver compelling research findings to stakeholders	I work with a bu	Why put so muc Guiding Principi	recoQjHQxKEw8NIS_blu	
Across Time-Zones	Share recordings of interviews with just the project team through Goo	Organize session notes and assets so they can be easily referenced later	Make information easier to reference and share	the recordings [;	"Earlier you had Inner Reasoning	recop0a2bPzuh09Wb_bk	
Across Time-Zones	Share session recordings with the project team in a Google drive folde	Organize session notes and assets so they can be easily referenced later	Make information easier to reference and share	And then that fit	"Earlier you had Inner Reasoning	rec8Sal0grp49RZdy_bkurr	
Across Time-Zones	Feel apprehensive when I don't know enough about the space to advis	Balance discovery research with development	Emphasize the business value of regular discovery research	Like some are be	"As you were sa Emotional React	recTK8ozqq01Fw5fv_bk	
Across Time-Zones	Communicate with the product management team by doing parallel res	Balance discovery research with development	Emphasize the business value of regular discovery research	Sometimes it's li	And is there any Guiding Principi	rec3w080808080808_bk	




Categories		
	Conduct deep user research to understand customer needs	▼
	Talk to users to answer questions that come up during product development	▼
	Revise personas and journey maps when there's a change in people's behaviors	▼
	Run quantitative research to size the problems in the market	▼
↳	Pivot based on continued user research to prevent bad investments	▼
↳	Focus on where the organization is positioned to offer something unique to make sure we can best serve our users	▲
	Plot our road map strategically, guided by research to make sure we can best serve our users' jobs to be done	=
	Map our all of the solutions in the market against what users would really like to plan next steps based on the resources at our disposal	=
	Look for users' pain points to focus on where we are positioned offer something unique and different	=
	Bring all the groups in the organization together to get their input and radiate ideas from throughout the organization	▼
	Coordinate interdependent tech teams to develop new features that touch several experiences	▲
	Experiment with new methods to become more agile as an organization	▲
Parking Lot		







Map our all of the solutions in the market against what users would really like to plan next steps based on the resources at our disposal



SIMILARDIFFERENT

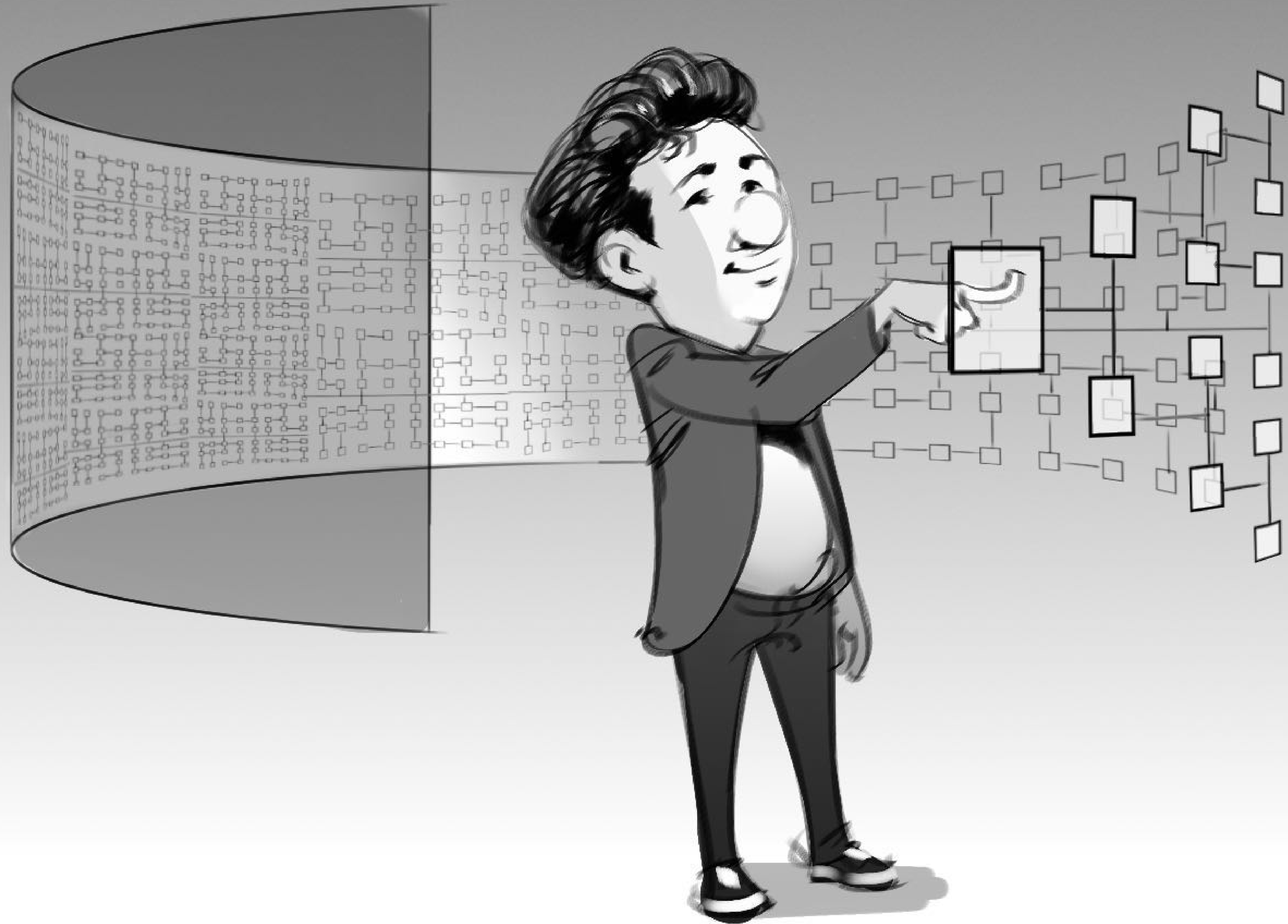


Look for users' pain points to focus on where we are positioned offer something unique and different



Affinitizer Export

People	Quotes	Goal	Task	Summaries	Clips
8	22	Identify themes by analyzing research data	Uncover findings through qualitative data analysis	Pull session data into Miro to synthesize	rect52E8pYxkU88b
8	22	Address pain points in my own and my team's workflow	Help my team function at its best	Focus on internal optimization to ease	recTapfbLjXGBr65q
7	16	Get in the flow of interviewing so I can adapt and dig deeper as needed	Facilitate sessions with users to understand their experiences	Adjust the flow of interviews based c	recjy5xnrWO4bCL8
7	22	Organize knowledge gleaned in various ways across the company	Make information easier to reference and share	Imagine having a research repository	rec8fc15eJMAnkPKU
7	19	Check in with my team members to ensure we are aligned	Orient everyone to what's been learned from research with users	Compare the detail captured in my n	recIjfw1MwTCMOA
7	15	Deepen my understanding of UX research and design	Learn and grow as a UX professional	Feel interested in tasks testing colors	recYZVOrz8QUBI1h
5	10	Communicate strategically according to the context and audience	Deliver compelling research findings to stakeholders	Share survey findings to raise my con	recm8ar9yGsYVdpW
5	20	Quote users to illustrate research findings	Deliver compelling research findings to stakeholders	Share compelling videos of participat	rec4oxx8sXVqlw6Y7
5	19	Balance discovery research with development	Emphasize the business value of regular discovery research	Balance friction on the team betwee	rec36iOYPPRYZfVY
5	12	Prepare questions for guiding interview sessions	Facilitate sessions with users to understand their experiences	Formulate interview guides after inte	recVCrziOp4NV1Gq
5	14	Organize session notes and assets so they can be easily referenced later	Make information easier to reference and share	Edit my notes after sessions to make	recoZtbOWav3b12E
5	7	Learn whatever I need to do my job well	Learn and grow as a UX professional	Look up industry acronyms and lingo	recEEpqsK97a6MyN
4	7	Recognize my personal bias can affect my work	Check my assumptions and the efficacy of my methods	Check my own bias when it conflicts	recbeUWLDMU4frp
4	6	Tell a story with my research findings to help people understand and en	Deliver compelling research findings to stakeholders	Create personas to bring empathy to	recN9h1wnXrXEHAi
4	12	Share progress with stakeholders often	Orient everyone to what's been learned from research with users	Roll out the findings of each research	recHPsckS9IdYusa6
3	5	Look further into issues that come up most frequently in the data	Uncover findings through qualitative data analysis	Prioritize the problems that need to l	rec3QTNktdN3mdB
2	3	Address stakeholder priorities in my presentation	Deliver compelling research findings to stakeholders	Start off my reports by providing my	rec2j9eB4hXCcyJg8
2	2	Screen study participants to have a representative sample	Design UX studies according to project goals	Screen participants for a usability tes	recBDfAcrC6BYre59
2	4	Star key information as it comes up during the study so I can easily retri	Make information easier to reference and share	Identify star-worthy moments in a us	recxmWsvEFmGDYb
2	4	Speak up as the voice of our users	Orient everyone to what's been learned from research with users	Participate actively in meetings not d	recpWsz0gFxaT0Uq
2	4	Maintain the voice of the customer to better understand and represent	Record sessions to document the voice of the user	Bring stakeholders closer to users by	recvlf-2BDYArEPBC





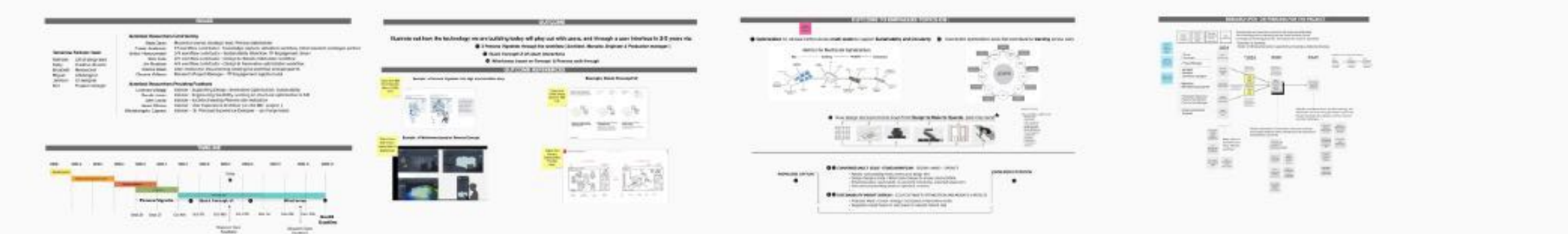
Generative Design for Industrialized Construction

A real-life example of how I used the Nuggetizer & Afinitizer to accelerate HCD

e on the factory floor <small>Count 25</small>			▼ Max 57:56	▼ Filled 25		
odels to illustrate an <small>Count 83</small>			▼ Max 1:00:00	▼ Filled 83		
actory efficiency while c <small>...</small>			▼ Max 42:16	▼ Filled 8		
t the, what levers we're allowing o play with is something that I, would want to be careful with, et's say you say here, you kno...	28a6799	13:56	14:21	Feel cautious about exactly how we allow AORs to play with the levers because the mod widths that we've designed are already pretty close to ...	3. Maximize factory efficiency while considering all the constraints	2. Use virtu illustrate an for industria constructio
omes to the affordable and e in particular, the name of the ensity. And so these are, these into typically more urban sites...	28a6799	16:32	16:47	Narrow the mod width as much as possible because density is the name of the game when creating affordable and supportive housing, and it will ...	3. Maximize factory efficiency while considering all the constraints	2. Use virtu illustrate an for industria constructio
st had a project and I'll, pardon e got so many of them going on where depending on the mod a double loaded corridor or fiv...	28a6799	16:47	17:26	Identify the bathroom sink as the surprising determining factor for mod width, because with density as the main constraint, a five-story building ...	3. Maximize factory efficiency while considering all the constraints	2. Use virtu illustrate an for industria constructio
member if it was *** or **** who p the idea of like these mod d changing mod width and like ve, we are combating somethi...	28a6799	29:13	29:48	Regulate mod widths because unlike normal productized elements like cars and phones, our products have to fit into a specific plot and are confined b...	3. Maximize factory efficiency while considering all the constraints	2. Use virtu illustrate an for industria constructio
...	28a6799	29:17	29:26



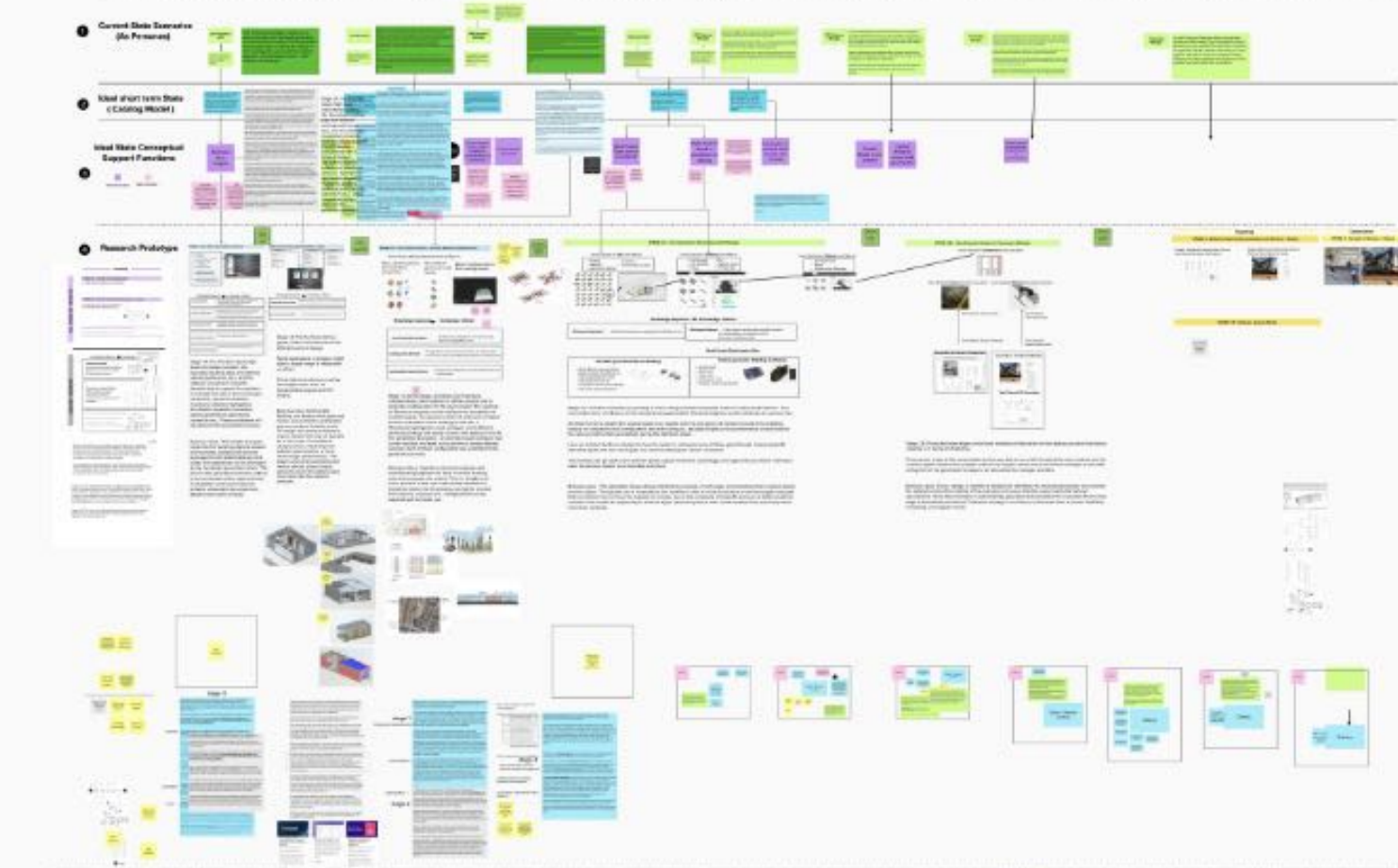
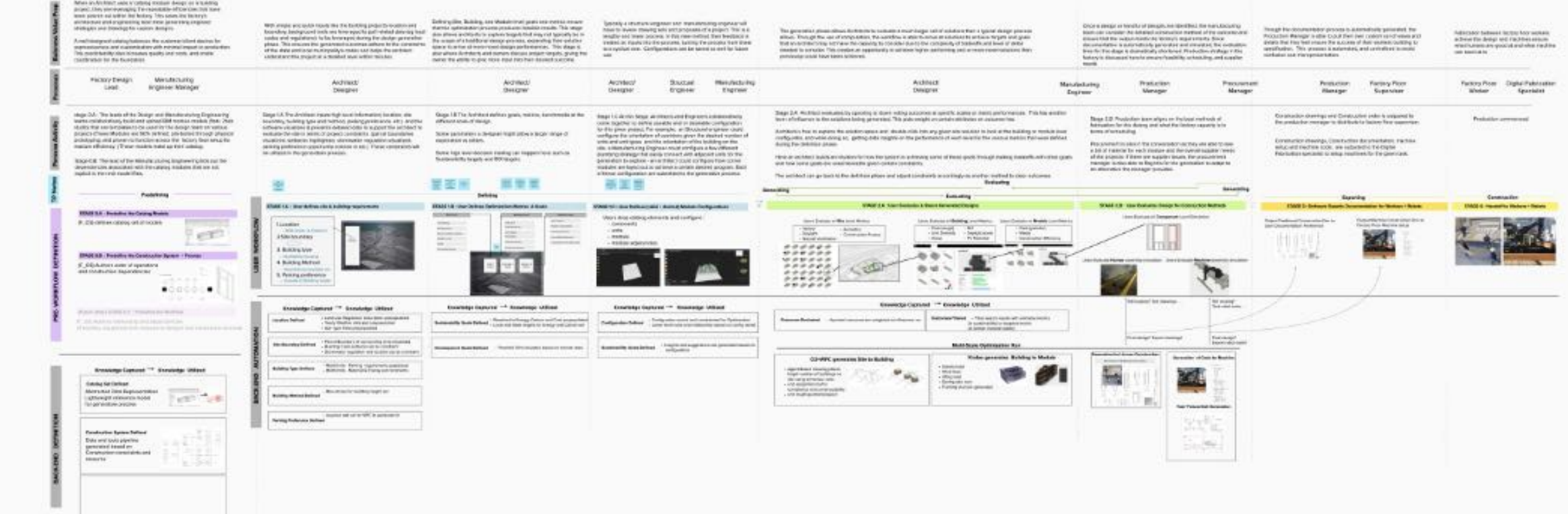
LEAD TREATMENT PLANNING



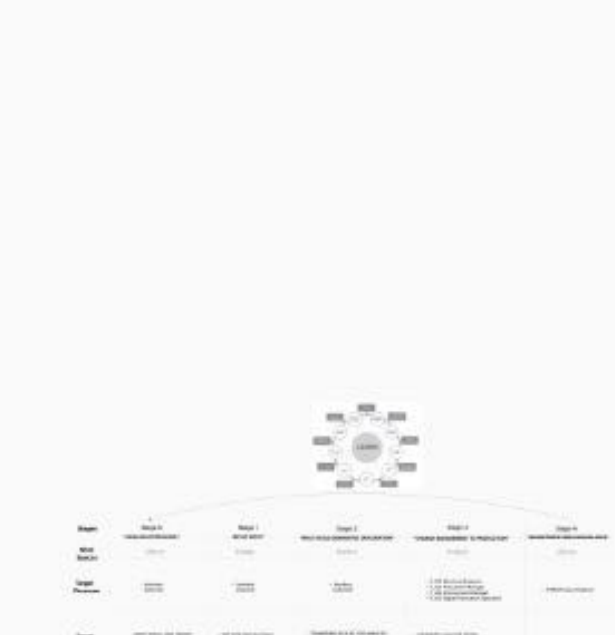
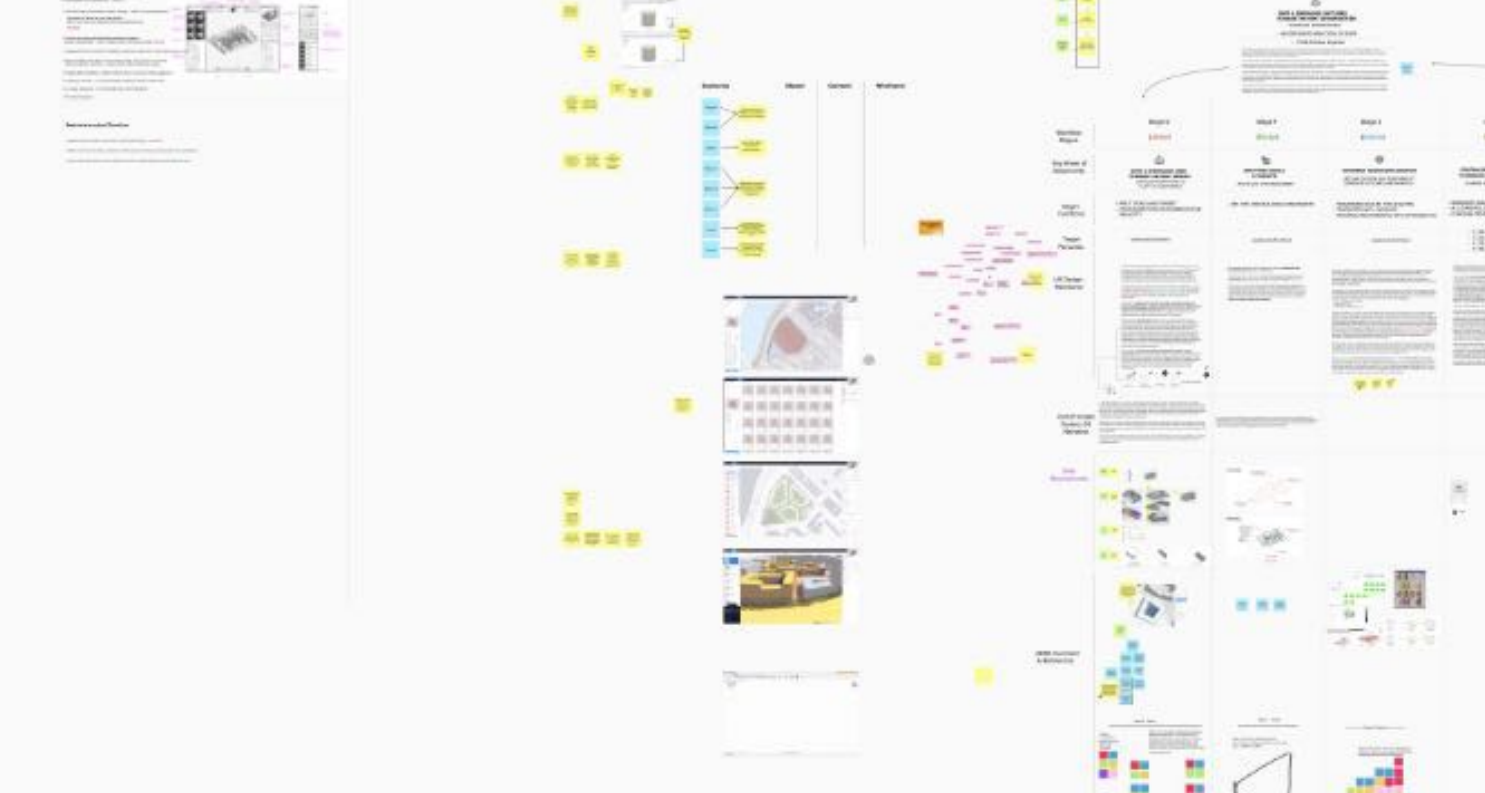
FACTORY DESIGN



MANUFACTURING SYSTEMS



Manufacturing Feedback



Build a virtual prototype for IC

bridge the gap between clients who want flexible, customizable products and internal systems set in place for high-performance industrialized construction.

Search and Catalog Panel:

- Search constrains brush generation and filters the catalog
- Contextually aware "brushes" generated to auto-complete the drawing
- "Like this" and "Not like this" regenerates that brush based on weights
- Expand to generate more brushes
- A taxonomy of catalog elements allows browsing through existing patterns

Top Navigation:

- Regenerate all brushes based on scoring
- Filter elements
- View different sample or optimizations
- Run sample to find missing process data and add bespoke constructions
- Change Projection (2D / ISO / 3D)
- Alternative samples or optimizations allow for comparison
- Show or hide layers (Plumbing, Electricity, Envelope, Site Layout)

Central 3D Model View:

- Go up a floor
- Zoom
- Go down a floor

Configuration Panel:

- Selected element in focus for configuration
- Element options help configure the catalog
- Tree of elements expose the hierarchy of components in the sample
- Element facades are the lowest level in the tree

Goals and Optimization Panel:

- Build site
- Samples vs goals
- Weight and add goals to constrain optimizations and set qualitative markers for sample metrics. 100 points are distributed among any number of coarse program goals (cost, constructability, sustainability, livability, occupancy, etc..)
- Optimizations are generated to meet goals based on current samples
- Regenerate optimizations

Stage 0: Catalog interfacing

External Architect
A new project has begun in our office for a series of multi-story housing complexes for a newly formed housing authority in Oakland, CA, with high standards for sustainability and energy efficiency. Our office has decided to leverage Project_3D and their modular construction methods to help us construct the project in the most efficient, affordable, and sustainable way.



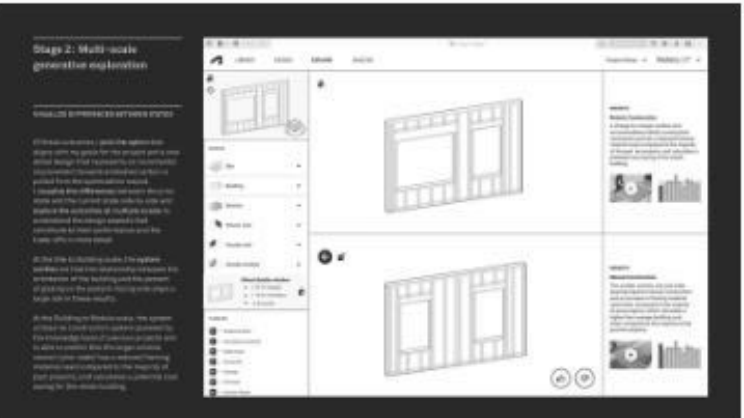
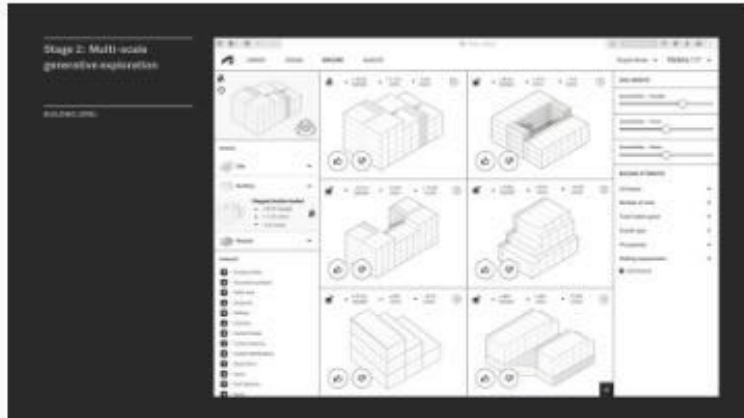
Stage 1: Set site and building constraints

External Architect
Now that the goals have been established, I move to defining the site boundaries and extents in the design space. With the boundaries defined, I review the full program of objectives and constraints that the generation will fit to and share it with the developer.



Stage 2: Multi-scale generative exploration

External Architect
Now that the generation has begun, I move to the explore space and begin to navigate through the outcomes that it has created. For each emerging outcome, I move from the site scale, to building, and module scales to understand how each outcome performs against my goals at the different scales.



Stage 3: Change management to production

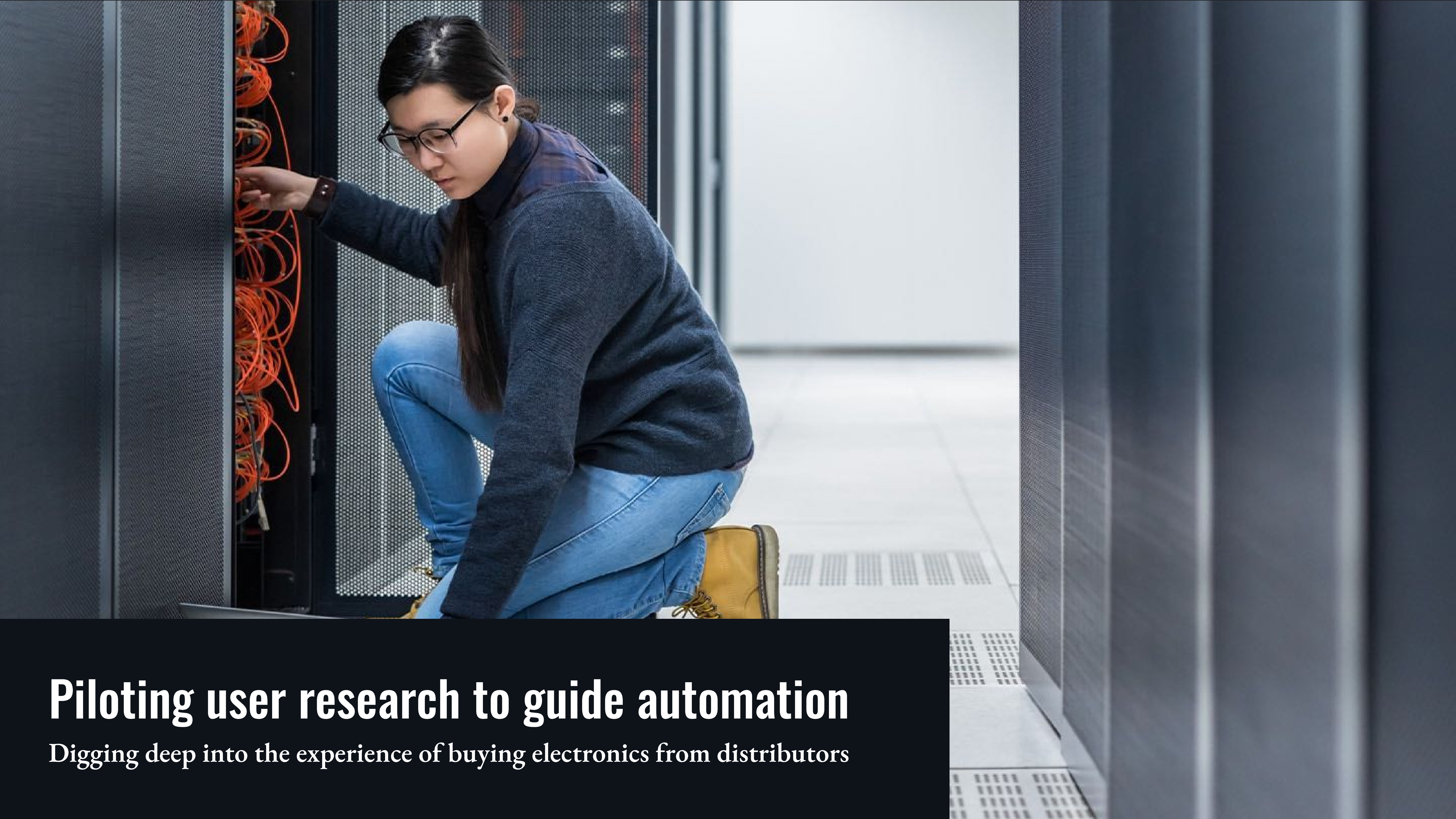
Building_3D Product Manager
With the design change, we need to be able to generate a detailed set of drawings and specifications for approval from other stakeholders and ensure everything is ready for production. I manage the production process, ensuring that all the necessary information is captured and that the production process is smooth and efficient.



Stage 4: Incorporate new catalog data

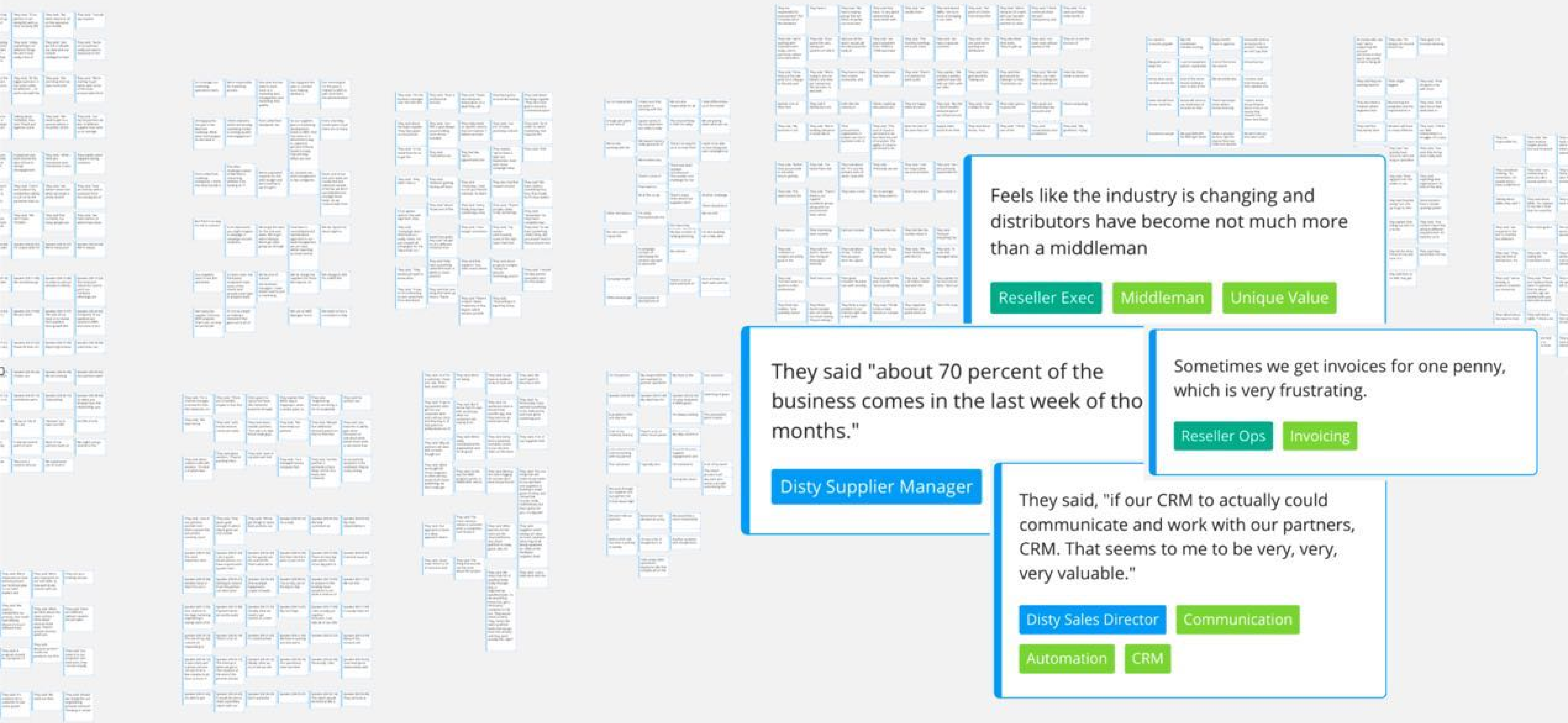
Building_3D Product Engineer
As the process requires for Building_3D, we begin to incorporate what we learned from the previous stage into our new catalog. We update the catalog with the new data and ensure that the information is accurate and up-to-date. This allows us to continue to improve our design process and ensure that we are providing the best possible experience for our clients.





Piloting user research to guide automation

Digging deep into the experience of buying electronics from distributors



Feels like the industry is changing and distributors have become not much more than a middleman

Reseller Exec

Middleman

Unique Value

They said "about 70 percent of the business comes in the last week of the months."

Disty Supplier Manager

Sometimes we get invoices for one penny, which is very frustrating.

Reseller Ops

Invoicing

They said, "if our CRM to actually could communicate and work with our partners, CRM. That seems to me to be very, very, very valuable."

Disty Sales Director

Communication

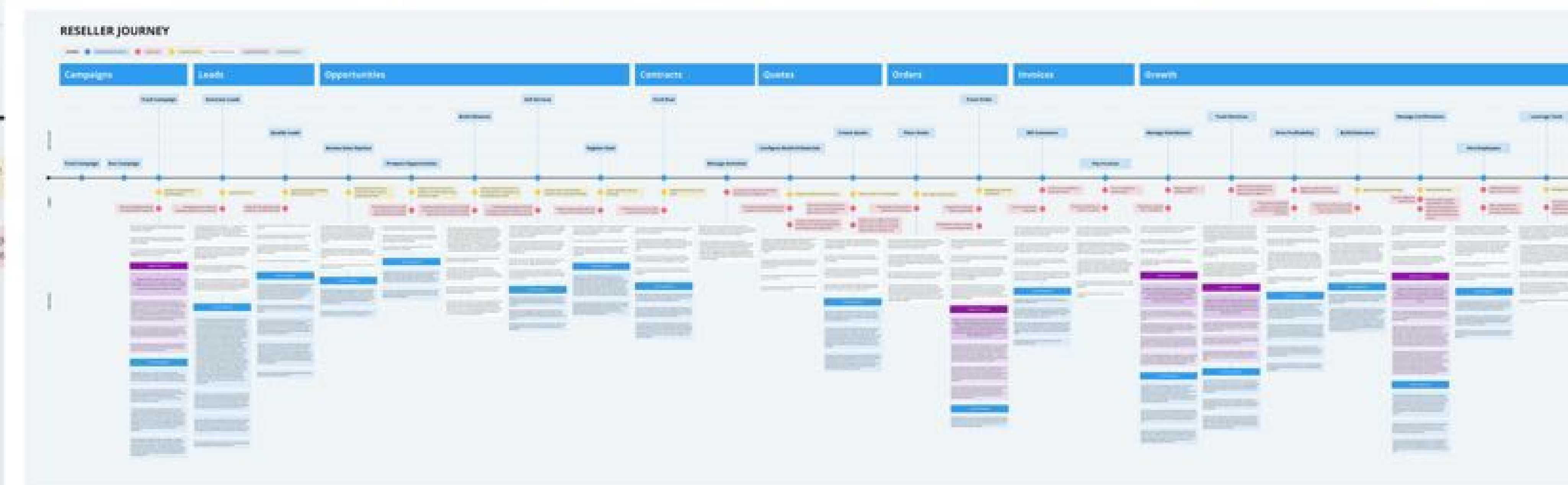
Automation

CRM

Designs

Leads

Opportunities



Supplier Perspective

Suppliers need to track the ROI of marketing campaigns so that they can diagnose issues and pivot if needed. Reporting on performance metrics related to sales and marketing has been a challenge.

They said that "before only used title of the marketing funds provided and did not achieve the desired ROI, and added" more

Arrow Perspective

When we bring on the marketing partner, we'd like to leverage Arrow help with marketing because they have a lot of really great relationships with the manufacturers, and I think that would be a big help if they could help us integrate those MRFs or programs or opportunities, all those things those manufacturers do

Arrow Perspective

They said, "we are unique because we can't get to the end user, so that's what we do and managing and communications and all that can be done by the end user, all to generate buying from the partners on the reseller. So there's that conflict will come in the manufacturer that result is being wanted that we're going to somehow overcome that. But, we go to go there."

Arrow Perspective

They said "We have called a contracting firm, four, for model, for 20's four weeks, four weeks, five weeks for our account. So that usually a month before the end of week the month is when we actually end our month. And then next week is, the help, how do you think going to you're do next month? And through the remainder of the quarter."

Regarding smaller partners, they said "A lot of our field people are engaged in a regular basis, being in doing maintenance type activities, training, or selling team of others. Our engineers are in working with them, doing training and or selling opportunities."

They said, "in an opportunity lead and a deal is registered, we then get involved by helping with configurations, demonstrations, and additional discovery & design."

opportunity and a client or skills that I just don't have. But I have that relationship. Give me give me the way to partner with another partner who does have the skills."

We know who to contact if we can't do something for a customer because of our longevity, being out in the field continuously, and being active in trade associations.

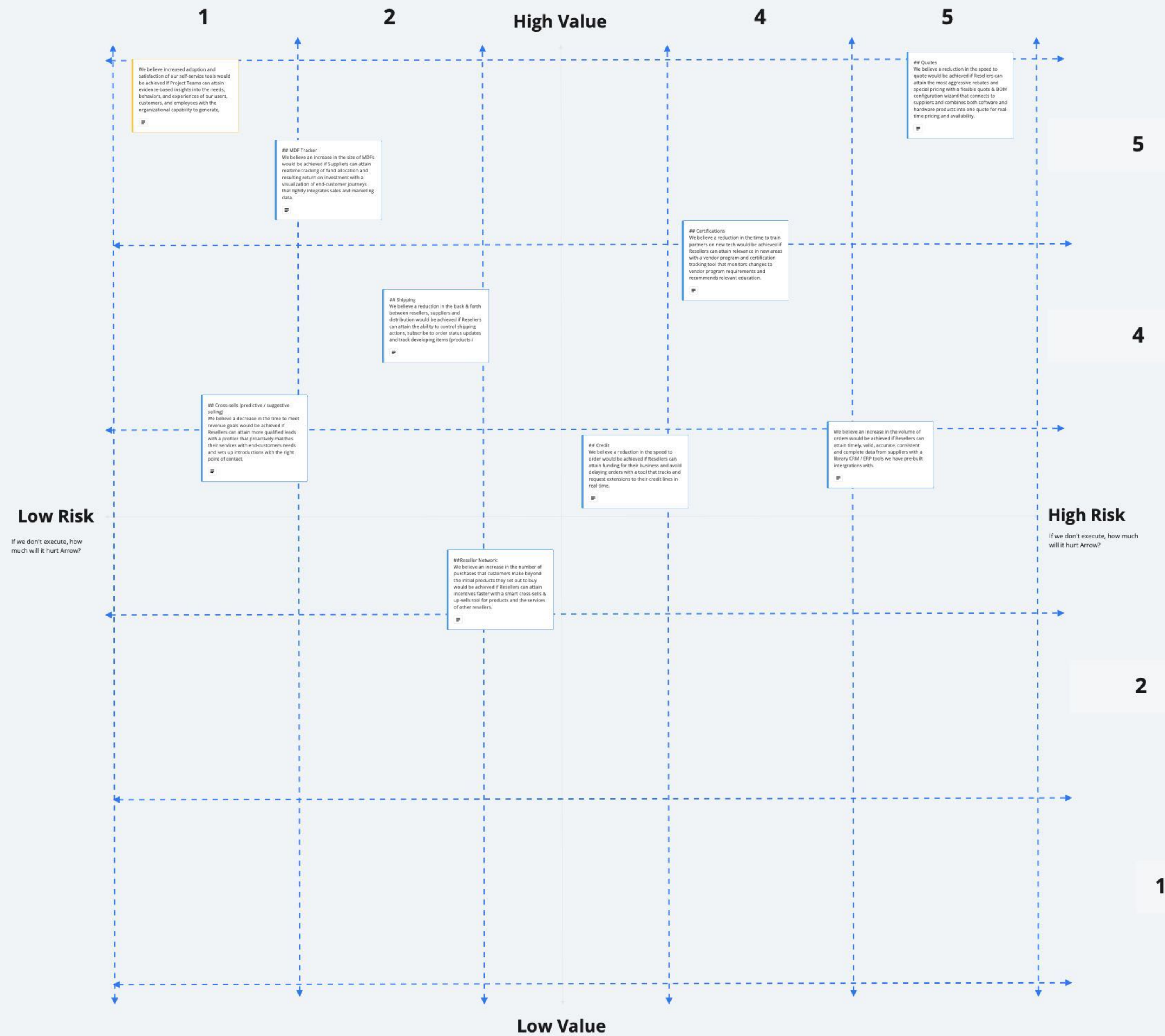
"The prime duration on being out of things is of people being very good at the things we are good at. But there are opportunities,

we're not doing overnight, you're still sending the money up there but you're getting the money paid out over a longer term." Adding "cash flow is critical"

Arrow Perspective

They said, "as a managed service company that Arrow will partner with them the back end to provide managed services to our non managed service partners so that they can have that to sell to their customer."





NEED

Track Orders

DESIGN OPPORTUNITY

Fulfillment Center

The screenshot shows a CRM dashboard with a '360 Quick Search' popup. The background dashboard includes sections for 'Pre-Sale' (Trending Leads, Recent Quotes), 'Contracts', and 'Opportunities' (with a donut chart showing 93 total opportunities). The popup displays the following information:

360 Quick Search

Back to Search Results

INVOICE NUMBER
2314124-52 27 Days Old

DETAILS

PARTNER	AMOUNT	STATUS	DATE
CDW_Logistics	\$25,1515	CREATED	06/29/19

Tracker

- JUNE 15 [Quote](#) SWS-4134122 Accepted
- JUNE 27 [Order](#) O-413412221
- 07/07/19 at 2:34PM
- JULY 07 [Acknowledge](#) A-413412221
- JULY 10 [Ship](#) TR-413412221
- JULY 17 [Invoice](#) 2314124-52

Opportunities 93

Status	Count
Inactive	35
Ready	42
Working	4
In-review	12

Recent Quotes

Quote ID	Company	Type	Submitted By	Date Submitted	No. of Quotes	Estimate Value	Status
OP_33231441	Johnson Controls NA		Brandon Donin	9/12/2019	12	\$215,000	READY

NEED

Prospect Opportunities

DESIGN OPPORTUNITY

Predictive Cross-Sells & Up-Sells

The screenshot displays a web application interface with a navigation bar at the top containing 'Access', 'DASHBOARD', 'PRODUCTS', and 'PRE-SALE'. Below the navigation bar is a header section with 'Products' and sub-sections 'ALL PRODUCTS', 'MY PRODUCTS', and 'THE PULSE'. The main content area is titled 'Suggested Products' with the subtitle 'BASED ON YOUR RECENT PURCHASES'. It features two product cards for 'TS1107-20DB' by Silicon Labs. The left card is marked 'IN STOCK' and the right card is marked 'LOW STOCK'. Both cards show a product image, manufacturer name, product category, description, and price per unit of \$5.85. Each card includes a 'Compare' checkbox and an 'Add to Quote' button with a shopping cart icon. The interface also includes heart and list icons for each product card.

“Because of his tenacity, and attention to detail, we were able to take an enterprise application from ideation to release in under 6 months.”

— UI Designer & Developer

“Miguel came in day 1 and with him he brought a wealth of knowledge and expertise to the team.”

— User Experience Design Lead

“We have everything from start to finish of what the vision is, what we need to do and why we need to do it.”

— Product Manager

“He is very engaging, approachable, and we trusted him to interview our customers on our behalf to get a true unbiased voice-of-the-customer.”

— Director of Business Operations



Establishing a Design Center of Excellence

Transitioning work in-house and gaining executive buy-in for HCD

Transition design work in-house

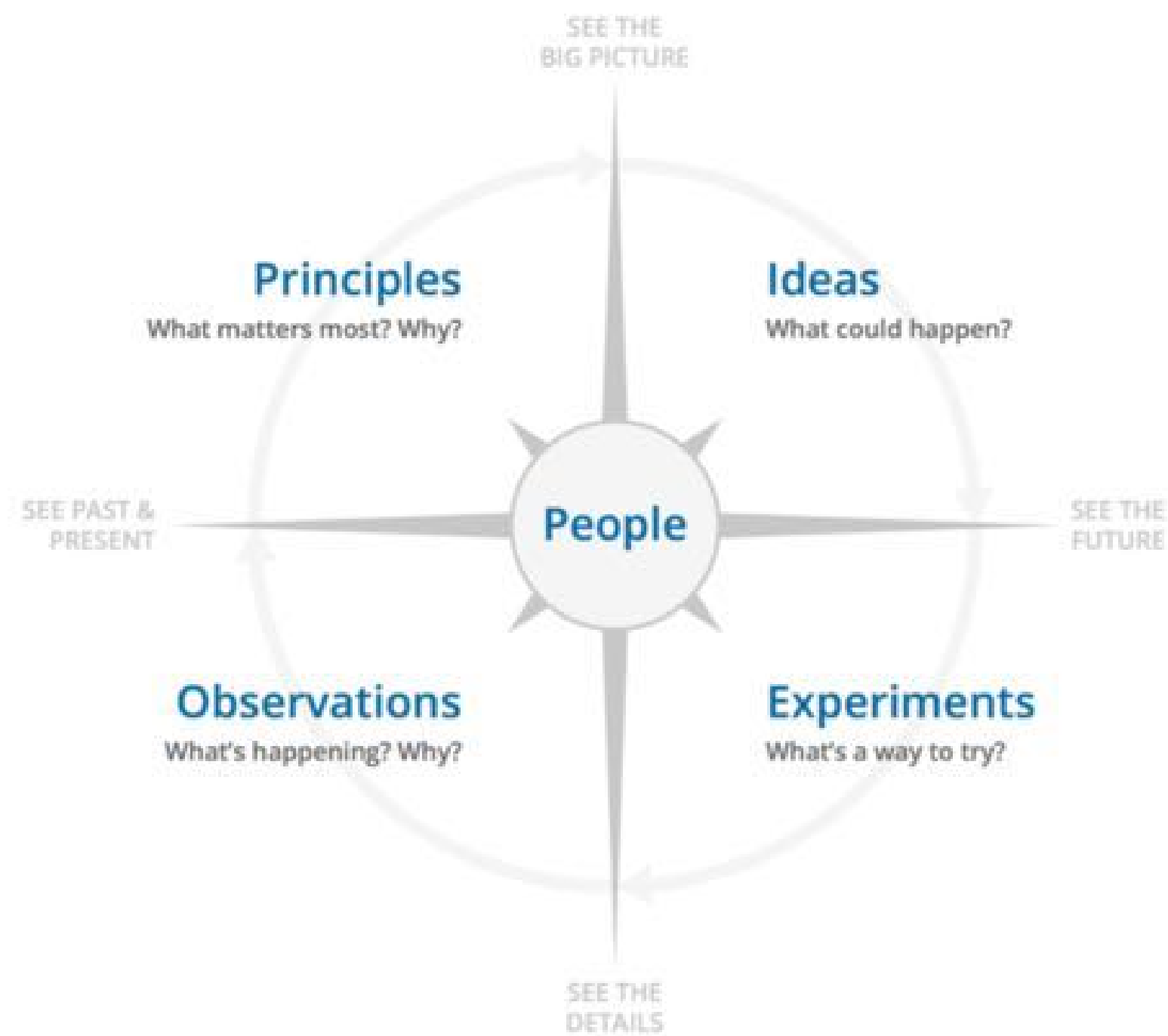
Successfully transitioned the design work in-house and terminated the relationship with the external vendor. Partially transition the work in house, pending hiring 2 staffers

Outcome

- Developed internal capabilities for design
- Developed a framework for defining internal design goals, planning and prioritizing
- A predictable cadence of delivery
- Reduction in total spend on design

Methodology

1. Access Onboarding & Compliance
2. Stakeholder Interviews
3. Backlog Creation & Prioritization
4. Transition Alignment
5. Design Support Costs & Equipment List
6. Job Descriptions & Compensation Analysis
7. Design Team Business Case
8. Transition Design Assets
9. EC Contributions & Bug Reporting Guidelines
10. EC 1.0 Release



Stakeholders Projects Workstreams Sprints Experiments Data Observations						
All Grid Hide fields Filter Group Sort Color ...						
	Name	Prior...	Project	Time Criticality	Impact	Risk
1	[Redacted]	3	[Redacted]	Low	High	Medium
2	[Redacted]	8	[Redacted]	High	High	Medium
3	[Redacted]	8	[Redacted]	High	High	Medium
4	[Redacted]	8	[Redacted]	High	High	Medium
5	[Redacted]	8	[Redacted]	High	Medium	Low
6	[Redacted]	13	[Redacted]	High	High	Low
7	[Redacted]	8	[Redacted]	High	Medium	Low
8	[Redacted]	8	[Redacted]	High	Medium	Low
[Add]	[Redacted]	8	[Redacted]	High	Medium	Low

Completed Experiments

Every two-week sprint we run 2-3 experiments designed to gain alignment, test assumptions and bring ideas to life.

<ul style="list-style-type: none">Business ModelingScenariosReview Prototype V1	<ul style="list-style-type: none">Business ModelingScenariosCDE Prototype V1	<ul style="list-style-type: none">Field GuideCall Center Visit & Retro	<ul style="list-style-type: none">Client Logo ReviewUM Proto-personasOkta Landing Page	<ul style="list-style-type: none">Visual AuditHeuristic EvaluationImplementation Plan	<ul style="list-style-type: none">Vantage Lite WireframesField Guide
<ul style="list-style-type: none">NLP Sales DemoField GuideRecruitment ScreenerContextual InquiryCompetitor ReviewReview Prototype V2Usability Testing AAnthem DemoReview Prototype V3Usability Testing BSelection IdeationSelection Prototype V1	<ul style="list-style-type: none">CDE Sales DemoField Guide	<ul style="list-style-type: none">Icon GraphicsStakeholder InterviewsGovernance Diagram	<ul style="list-style-type: none">UM Landscape Analysis		



NLP Simplification

User Research Insights

1. Name & DOB
2. Dates of service
3. Known conditions
4. Reviewers need to capture conditions that NLP may not have identified
5. Leave a review unfinished
6. Mistrust of Machine Learning
7. Pages vs page highlights
8. ICD vs HCC Codes

Annotations on the interface:

- Navigate or adjust view
- ~~Control ML Threshold~~
- ~~Collapse or browse findings~~
- Navigate to or add custom
- Search for codes with 3M API

Search for codes with 3M API

~~Accept or reject the finding~~
~~(reason must be given if rejected)~~

James Doe

Date of Birth
03/21/1932

Dates of Service
03/21/2017 - 04/21/2017
Project
ABC Medicare Review

Known Conditions
22 - Morbid Obesity
34 - Chronic Pancreatitis
40 - Rheumatoid Arthritis and
Inflammatory Connective Tissue Disease
<See more >

75%

1 / 5

Review Conditions

Capture Conditions

James Doe

Male DOB: 3/21/1932

04/01/2016 - Office Visit: office visit

Provider: Jane White MD

Location of Care:

Cardiology Office Visit Note

Patient Review

Date of service: 04/01/2016 1:16 PM

Impression & Recommendations:

Problem # 1: CAD (ICD-414.00) (ICD10-I25.10)

jaw pain with exertion, had negative cath in 2012 in the setting of chest and jaw pain
will get a stress test
cardiac meds

Problem # 2: ESSENTIAL HYPERTENSION (ICD-401.9) (ICD10-I10)

elevated blood pressure today, he did not take his medicine yesterday or today, discussed the importance of compliance, I suspect his noise could be related to hypertension

Capture Conditions

Service Start Date
04/01/2017

Service End Date
04/01/2017

Facility Type
Hospital Inpatient Other

Document Source
ABC Medicare Advantage Pro

Provider Signature
Electronic

Signature Status
Acceptable

Provider Name Present

Provider Credentials

Page Range 1-2

ICD CODE & DESCRIPTION

PAST MED. HISTORY

Search ICD

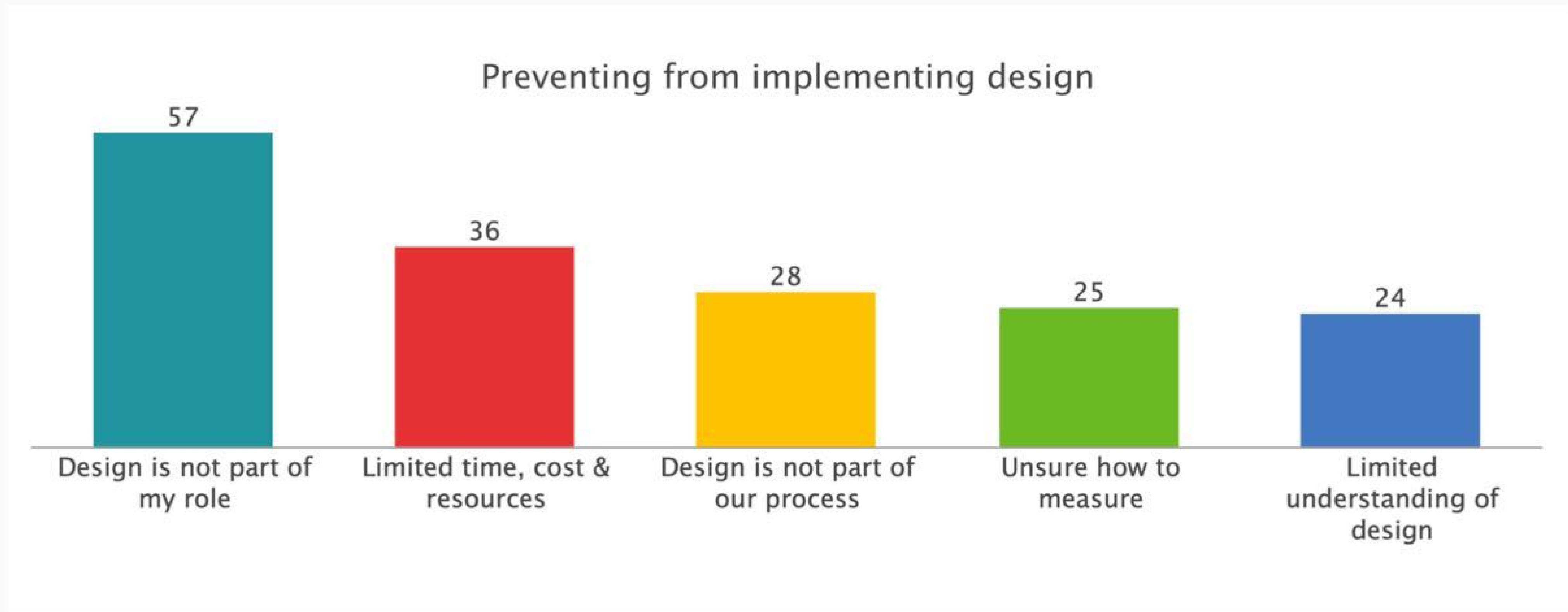
No

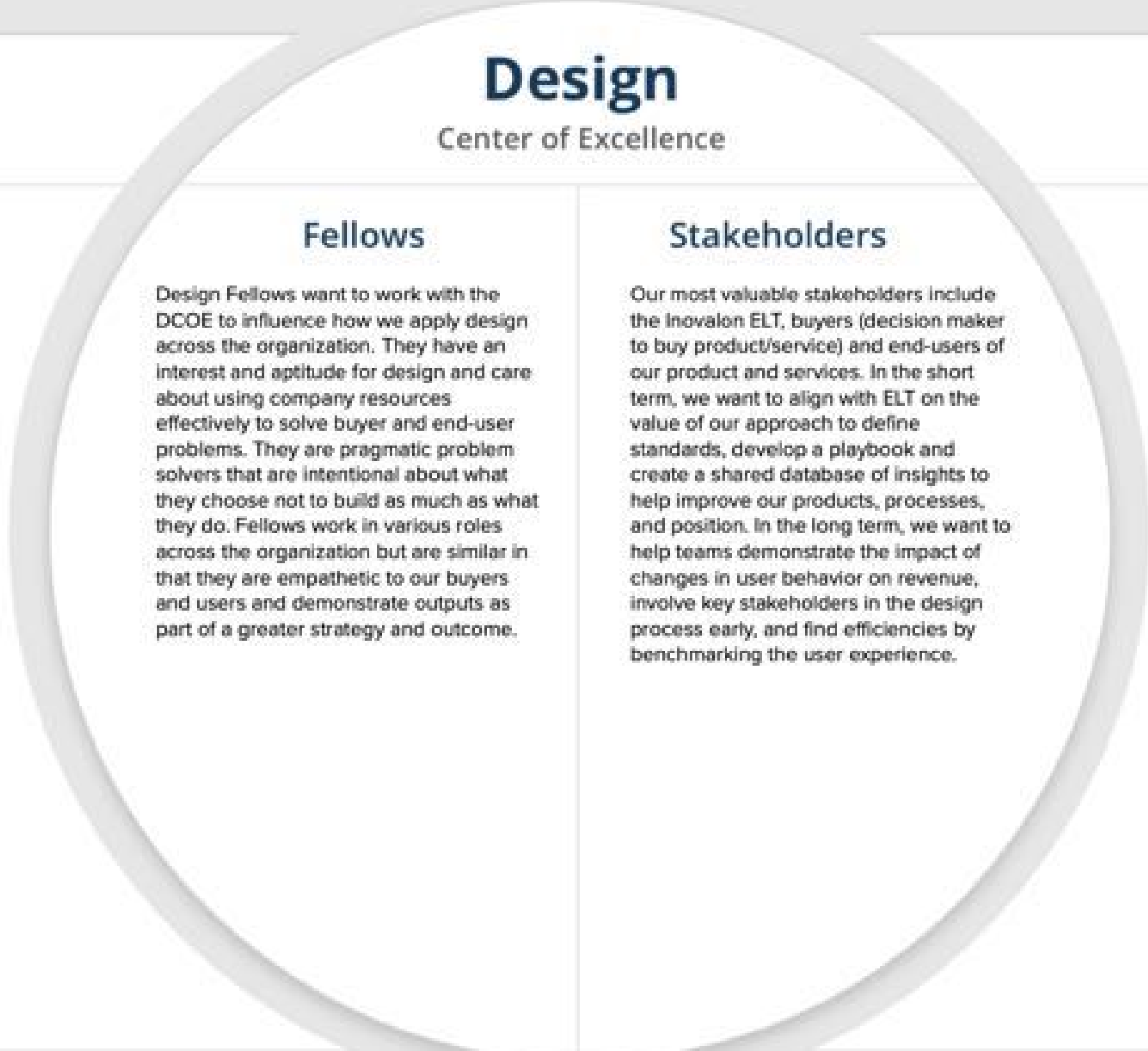
Cancel

Save



Learnings from open-ended responses: Design is not explicitly part of the work teams and individuals are expected to do. There are time, cost, and resource constraints to implement. Lack of clarity on how to implement and measure design practices. Lack of awareness of design, its full value and how it can be applied to daily work.





Design

Center of Excellence

Fellows

Design Fellows want to work with the DCOE to influence how we apply design across the organization. They have an interest and aptitude for design and care about using company resources effectively to solve buyer and end-user problems. They are pragmatic problem solvers that are intentional about what they choose not to build as much as what they do. Fellows work in various roles across the organization but are similar in that they are empathetic to our buyers and users and demonstrate outputs as part of a greater strategy and outcome.

Stakeholders

Our most valuable stakeholders include the Inovalon ELT, buyers (decision maker to buy product/service) and end-users of our product and services. In the short term, we want to align with ELT on the value of our approach to define standards, develop a playbook and create a shared database of insights to help improve our products, processes, and position. In the long term, we want to help teams demonstrate the impact of changes in user behavior on revenue, involve key stakeholders in the design process early, and find efficiencies by benchmarking the user experience.

What do we do?

Design is a strategy-making process that uses research and rapid-prototyping to systemically test new ideas, decrease our time to market and reduce the risk of visible failure. We believe that growing our internal capabilities for design will increase sales and end-user productivity while reducing internal rework, and lowering the risk of building solutions without market fit. The DCOE helps educate and advocate for the value of design across the organization through outlining best-practices, training staff on methods, and defining success metrics. We seek to integrate this work into the day to day workflows of teams by providing a path to improving stickiness, satisfaction, referrals, and the lifetime value of clients.

Our strategy will focus on working with specific teams likely to apply design and demonstrate the most value. We'll also let people self-select into the program by attending trainings and using the resources we provide to improve design maturity on their teams. Depending on needs, these resources could include playbooks, standards, pattern libraries, prototyping tools, and research software. The DCOE is committed to building practices through quarterly training from an external design expert to monthly lunch-and-learns with our internal design facilitators. The DCOE will model behaviors and provide guidance, but will not be a bottleneck to outputs. Our focus is providing Fellows a clear path of how to generate evidence, outputs, and outcomes. Our success is measured by the number of fellows actively collaborating with the DCOE and how well their teams are applying design to improve our products, services, process, and/or position through user research and rapid-prototyping.

How do we communicate?

The DCOE is an advisor, which grows the design maturity of teams across Inovalon. We share resources and standards for gathering evidence, generating insights, and improving our products, services, processes, and/or approach. The DCOE communicates through training and mentorship with internal teams which includes modeling the behavior of user interviews, usability testing, and other strategies with external stakeholders. We share knowledge through the creation and distribution of a playbook, service standard, and a client insight database. Fellows will advocate for participation in the DCOE by sharing success stories and building relationships with decision makers. In addition to self-selection, the DCOE will proactively engage with teams that have been prioritized as valuable design opportunities at Inovalon.

What constrains us?

The DCOE's most significant risks to success are alignment, buy-in, the ability to open access to our buyers and users for research, and how quickly we can improve organizational design maturity and be able to measure ROI. Around these risks include core design team's small size and limited bandwidth, risks to finding and hiring design trainers with the right experience, conflicting organizational values and overall expectations around short and long term impact of the DCOE program. DCOE's major obstacle is a lack of awareness regarding what design is and why it's important and teams having little tolerance for being forced to make large investments of time into something they don't understand.

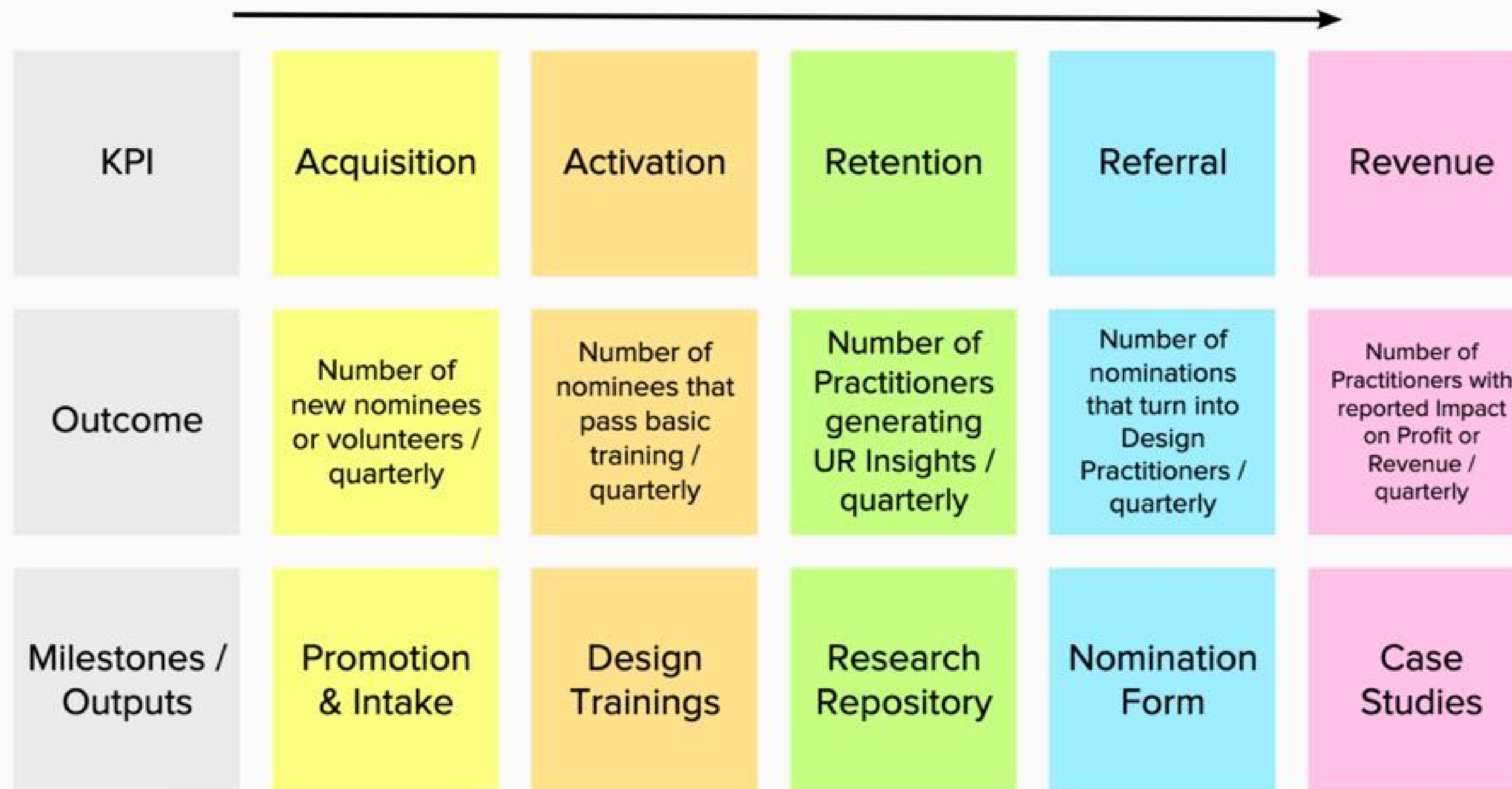
How are we structured?

The DCOE's Core Team is composed of design experts responsible for training, facilitating design, developing frameworks and tools. Our Executive Sponsors are responsible for maintaining alignment with the ELT and helping the program overcome change management barriers. Our mission is to give teams a clear path to generating insights about our buyers and users with Design Fellows acting as advocates and initiators of design through user research and rapid-prototyping. We seek to grow the percentage of employees who lead or participate in user research each month building the team's design maturity. We set goals by working with our Sponsors to align with the ELT and take into account change management risks and concerns. Our initial goals are:

- Align with ELT on the plan for tracking and measuring design maturity
- Schedule and implement training through an external design facilitator
- Identify Fellows (pre-selection with product matrix and self-selected)
- Promote the DCOE across the organizations
- Increase the number of active Design Fellows
- Increase the quality of work using the Design Maturity Model

Milestones & KPIs

Traction: how many are completing the process quarterly



Viral coefficient: number of new practitioners an existing practitioners generates.

“Miguel had a tough job trying to transform an existing Agile SDLC culture by integrating the power of design thinking into product creation. Throughout the project Miguel demonstrated endless patience and enthusiasm for sharing his knowledge to evangelize design within the organization. Miguel has a knack for spotting raw design talent and is an advocate for investing in those individuals to help them rise to their potential.”

— Senior Director, Platform Solutions

“It is no small task to add a new enterprise-wide discipline to an organization, especially one that is as dynamic, aggressive and striving to mature in numerous areas. I appreciate the struggles, perseverance, and small wins you faced each day. Those are all necessary building blocks to change. Thank you for your initiating the movement and we’ll be sure to continue the advancement.”

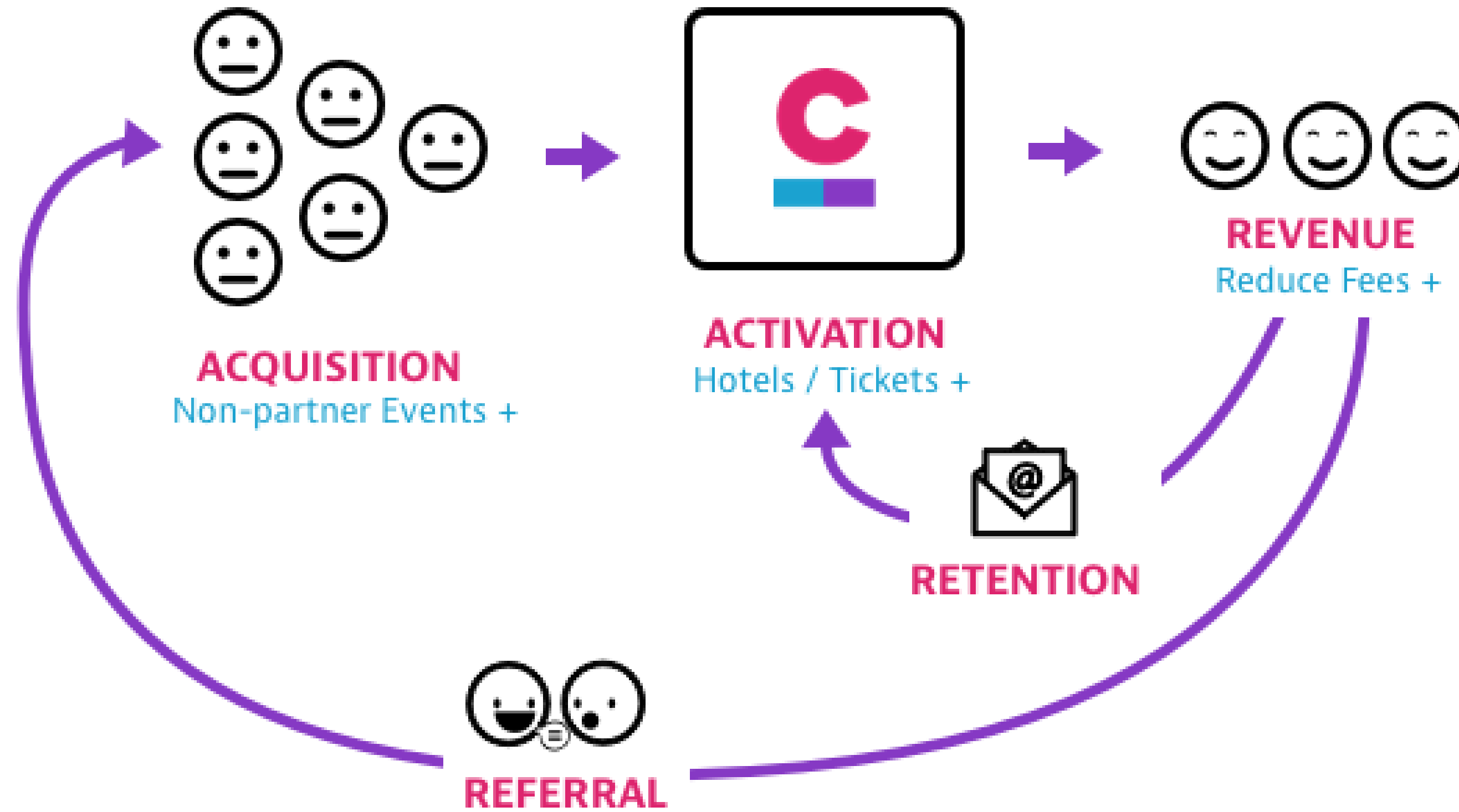
— Chief Product Officer



Co-creating a new vision for festival travel

Helping a festival ops company enter an adjacent market online

Curadora Customer Factory



THROUGHPUT
New Customers / Day

Patterns from User Research

“ Finding friends to go with me can be stressful and time consuming

tag: first.time.festie

“ I have to act quickly or tickets and nearby lodging will sell out

tag: planner

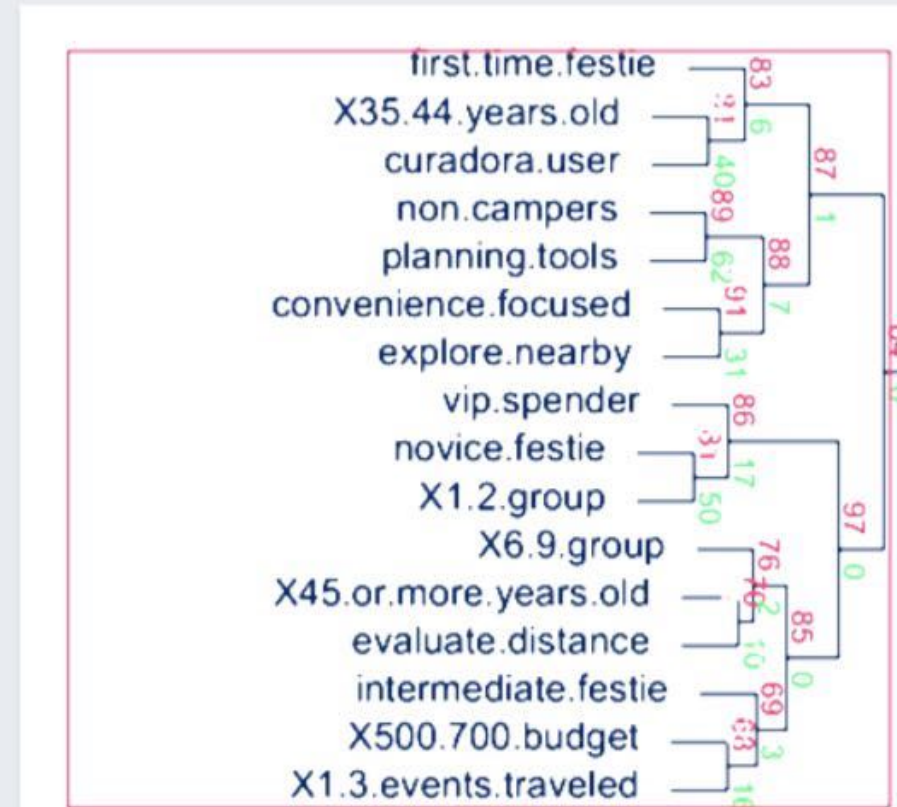
“ I keep in touch with my core group using a group chat to coordinate

tag: core.group

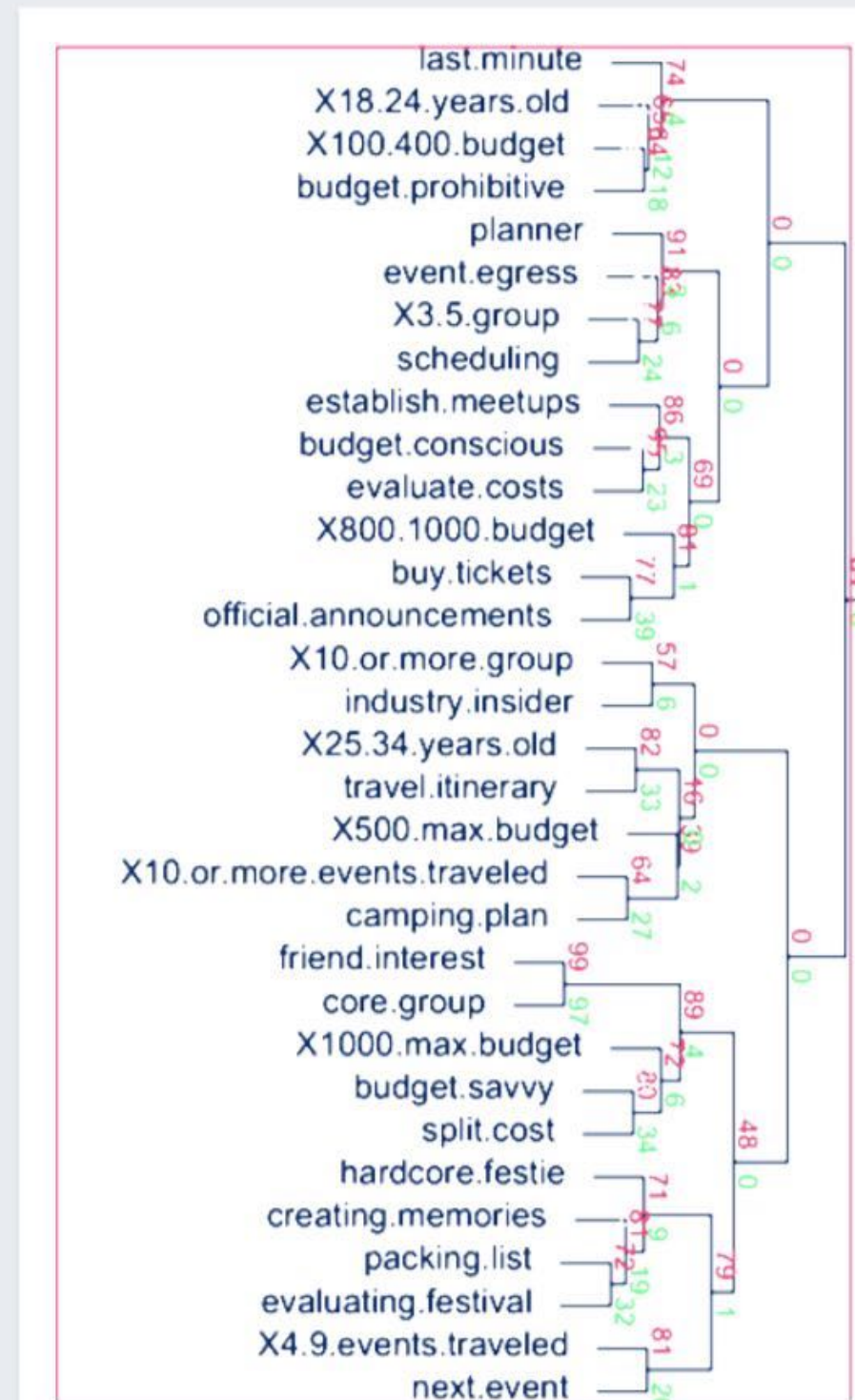
“ When we purchase as a group it usually lowers the overall cost of the trip.

tag: split.cost

tag cluster: a



tag cluster: b



Personas

- Festie persona
- Non-camper persona
- :::
- Persona card
- Insight card
- + Add another card

Discovery

I'll hear about an event I might be into through an official channel on social media, a website, or even the radio. If I miss an announcement, there's a chance one of my friends have already seen it and will tell me about it.

+ Add another card

Evaluation

I evaluate the festival vibe so I can put my time and energy into something that I think I'll enjoy. If the vibe is right, I can then reach out to people I know who would also be up for it.

I have to check if I'm free before I can decide if I can go to an event. I have to spend time figuring out who else can go since I wouldn't want to go alone. I really enjoy looking forward to a trip with my friends a few months in advance.

I prefer to go with a group because it makes the trip more fun and affordable. However, it can be stressful and time consuming to find the right friends to go with.

I feel an uneasiness when I can't anticipate all costs and don't know if I can stay within my estimated budget. At times I will be sacrificing my comfort and convenience in order to align with what my friends are willing to spend.

I check to see if the event is within driving distance because that tells me the cost of transportation. If I can drive there I can bring more people, carry my gear, and make a road trip out of it.

+ Add another card

Planning

The first thing I do is purchase tickets for the event in order to secure my spot and start the planning process with my group.

I plan things because if I don't no one will. It's a lot of work but in return I get to define the experience, lower cost, and make it easier to get my friends to go. When all the planing is done, we all have something great to look forward to.

I'll choose not to camp because it can be tiring and I'd rather stay clean, comfortable, and avoid sleeping in terrible weather conditions.

I use several online tools to help me find the closest lodging options, and the best deals.

I keep in touch with my core group using a group chat to coordinate all aspects of the trip, get ideas from the group and keep everyone in the loop. We do everything from researching the best options to figuring out the driving route and discussing who we want to see at the event.

I create a running packing list to prevent the stress of forgetting something and not being prepared for the conditions of the festival.

I'll choose to camp because I want to be close to the action and feel more connected with the community and the festival vibe. It's also nice not having to drive back to where I'm staying after each day

Right before

We communicate and coordinate how we're getting to the event so that we can all get there smoothly and have a good time together.

When we purchase as a group it usually lowers the overall cost of the trip. Getting my friend's payment confirms that they're committed to going.

+ Add another card

During the event

I like to establish meetup spots so I can find my friends at events even if we split up.

+ Add another card

Right after

I make lasting connections at festivals. We created so many great memories together and we love to retell our stories.

When I have to deal with packing up all my things, leaving the event, and making the journey back home, it's tiresome and not enjoyable.

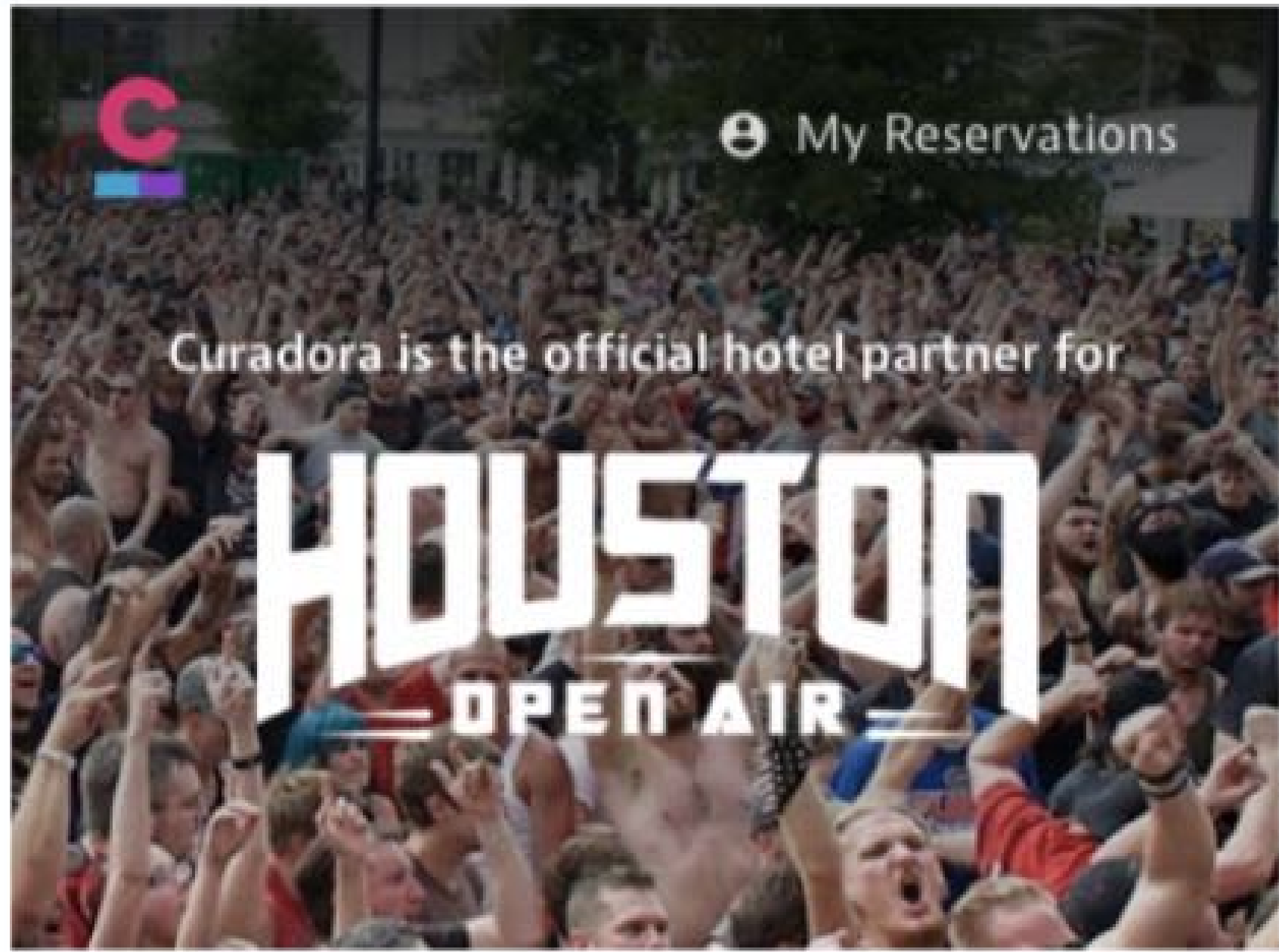
+ Add another card

Long after

Going to a music festival is an escape from reality to a bigger community and culture that I love. I'm drawn to do it again and again.

+ Add another card





Event Dates

SEP 24 - SEP 25

Venue

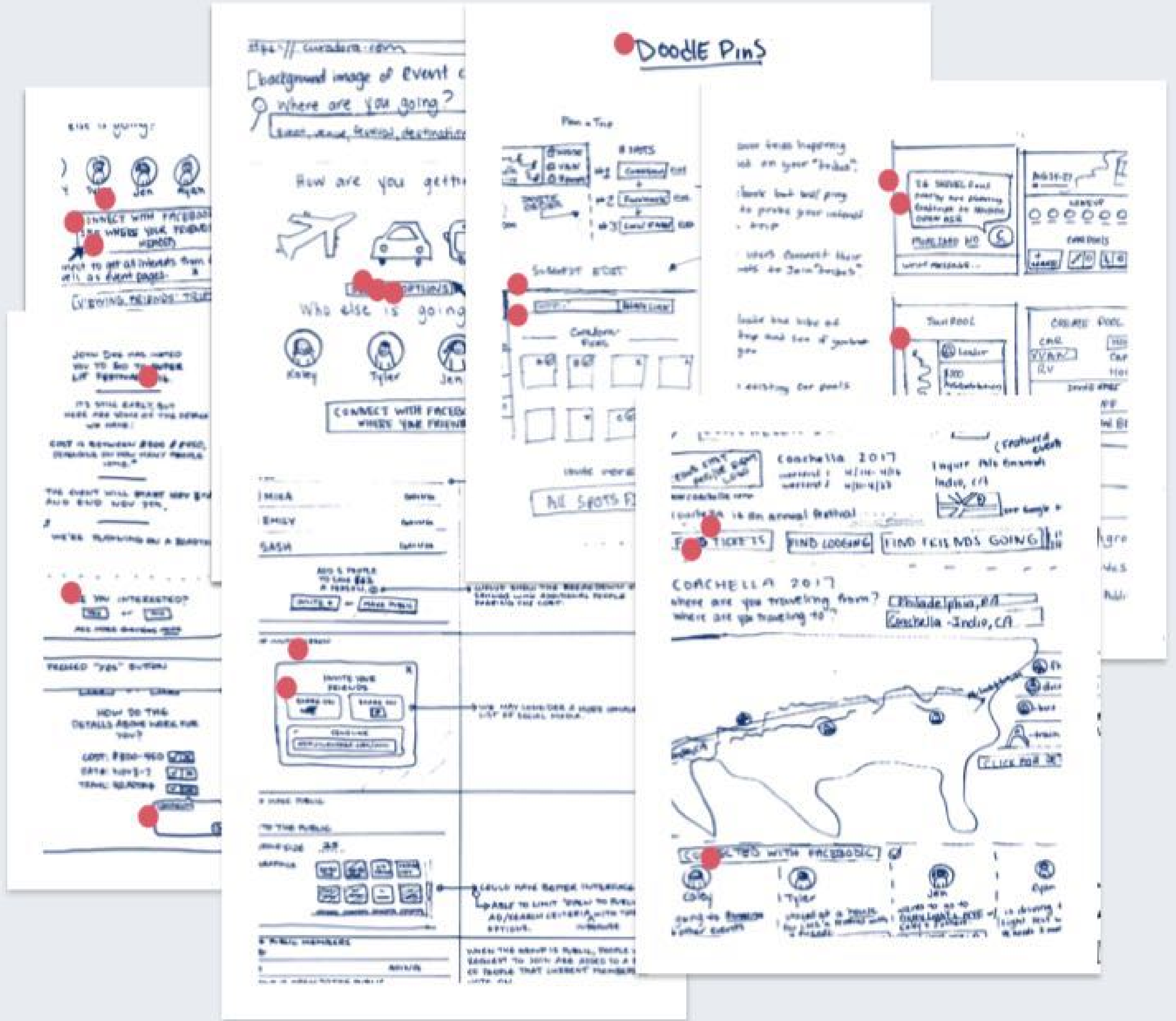
NRG PARK - HOUSTON, TX

View Shuttle Routes

Buy Tickets

Sep 24 - Sep 26

More Filters





My Reservations

Curadora is the official hotel partner for

HOUSTON OPEN AIR

SHOW EVENT DETAILS

Check In & Check Out

Apr 14 - Apr 17

Price (USD)



Min. Star Rating



Rooms

1 Room

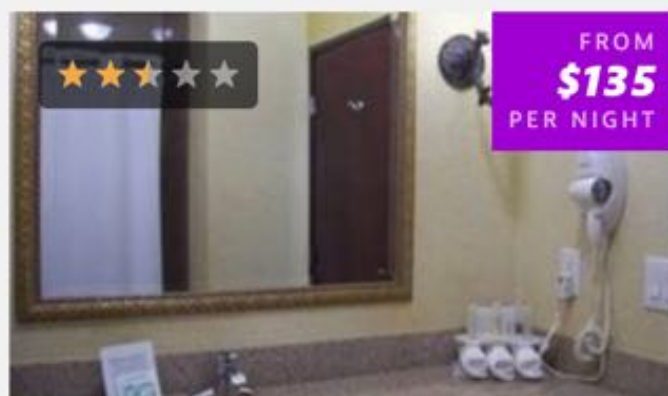
More Filters

Sort: **Closest to Event**

1 - 24 (of 323) hotels near **NRG Park**

GRID

MAP



FROM \$135 PER NIGHT

8080 Main - Houston Medical Center

7.6 guest rating

VIEW DISTANCE FROM EVENT

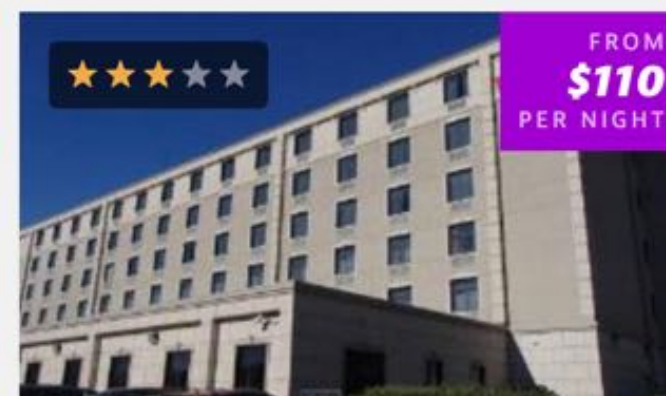


FROM \$80 PER NIGHT

Econo Lodge Medical Center

8 guest rating

VIEW DISTANCE FROM EVENT

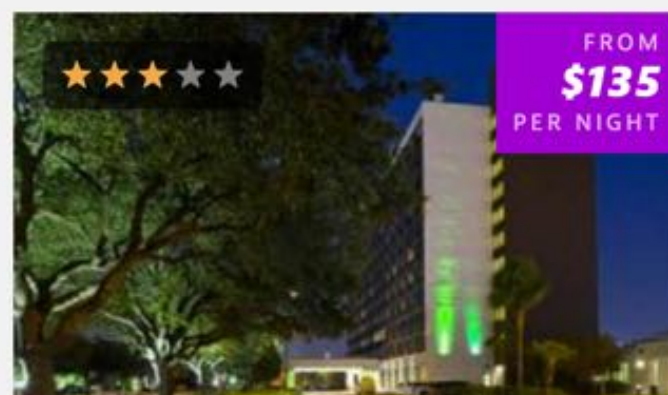


FROM \$110 PER NIGHT

BEST WESTERN Plaza Hotel & Suites At Medical Center

7.6 guest rating

VIEW DISTANCE FROM EVENT

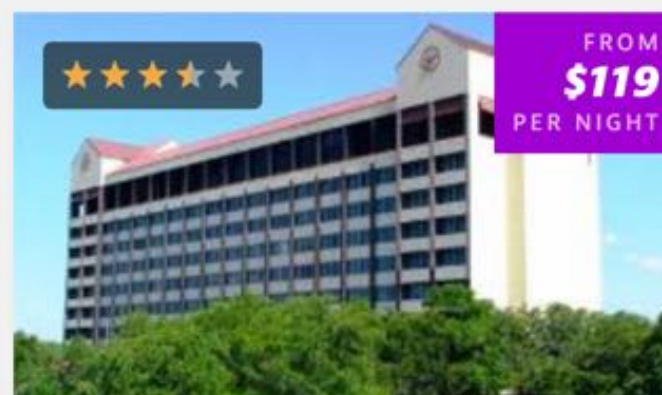


FROM \$135 PER NIGHT

Holiday Inn Houston S - Nrg Area - Med Ctr

7.9 guest rating

VIEW DISTANCE FROM EVENT



FROM \$119 PER NIGHT

Crowne Plaza Hotel Houston Near Reliant/Medical Center

6.4 guest rating

VIEW DISTANCE FROM EVENT



FROM \$79 PER NIGHT

Extended Stay America - Houston - Med. Ctr. - NRG Park - Kirby

7.4 guest rating

VIEW DISTANCE FROM EVENT



FROM \$140 PER NIGHT



FROM \$110 PER NIGHT



FROM \$139 PER NIGHT

“He is one of the easiest people to both talk to and work with, and often goes above and beyond to ensure the design process is successful while helping the company define, re-define, and achieve its biggest goals. He is extremely knowledgeable about his field, trumped only by his passion to learn and apply new methodologies when they are applicable.”

— Director of Product Management

“Miguel's curiosity to learn and expand his knowledge is invigorating. His desire to connect on a deeper level with users truly shows just how much companies need someone like him who think outside of the box. His enthusiasm and high energy got everyone so excited to come to work everyday to help to further achieve our team goals.”

— Project Coordinator, Digital Initiatives