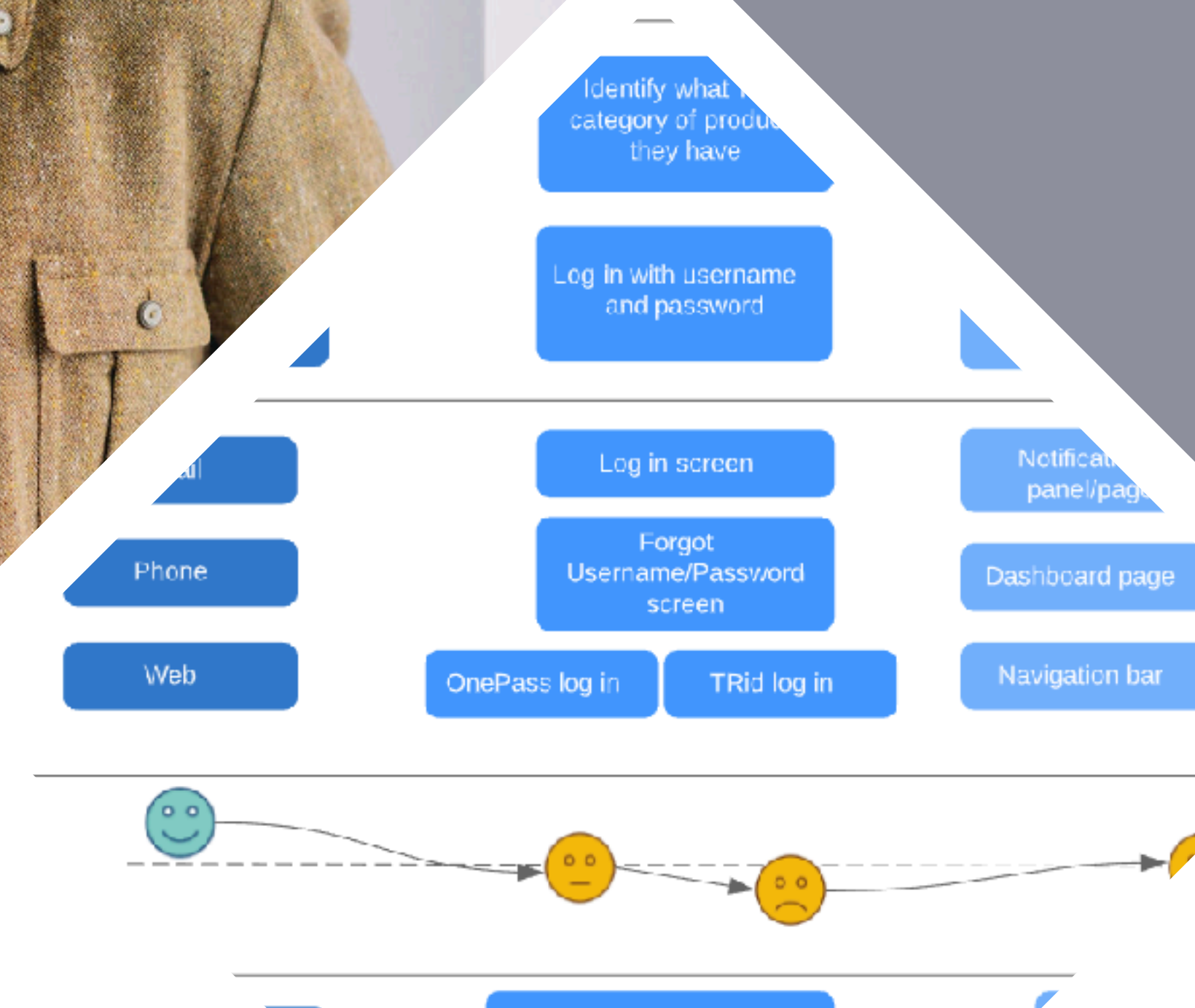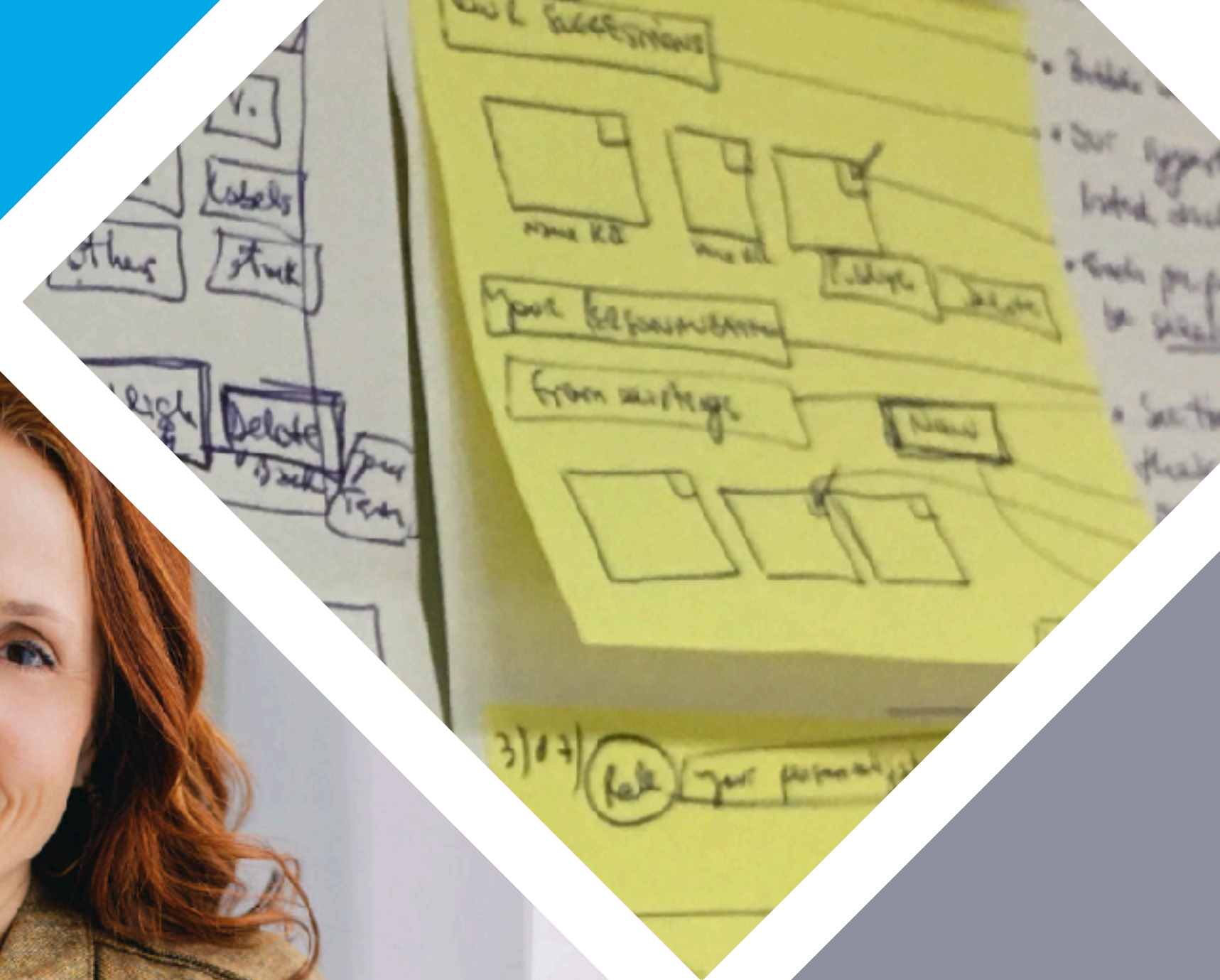# Hi! I'm
Amy Smith

Senior UX Strategy & Design Operations leader

About me

I live in Northfield, Minnesota with my husband, Ed. We have two "mostly adult" children and we all love to travel, cook, and stay active outdoors. I am a **Senior UX Strategy and Design Operations leader** with over 20 years of expertise in creating engaging and meaningful experiences that keep the needs of user, the goals of the organization, and the pressures of the market in focus to create a successful and valuable outcome. I have built diverse, highly collaborative cross-functional teams that thrive in a culture of design thinking and operating with autonomy. I truly believe that design can make the world a better place.

amy@amycsmith.com
LinkedIn: amycsmithdesign

My leadership style

I often use the phrase "hive mind", meaning that we work together as a cross-discipline team to understand the customer problem and their "jobs to be done". The team can then root their practice in elegant, scalable design solutions. I extend this mindset beyond Design by building partnerships across Product, Research, Content, Accessibility (A11y), and Engineering so that we are "hive mind" and working to the same goal.

My philosophies:

• Respect and honor the work/life balance, as burn out is real.

• Be curious, be playful, and never stop exploring.

• Own your sh*t and be accountable. Craft and quality matter.

• The customer is your boss.
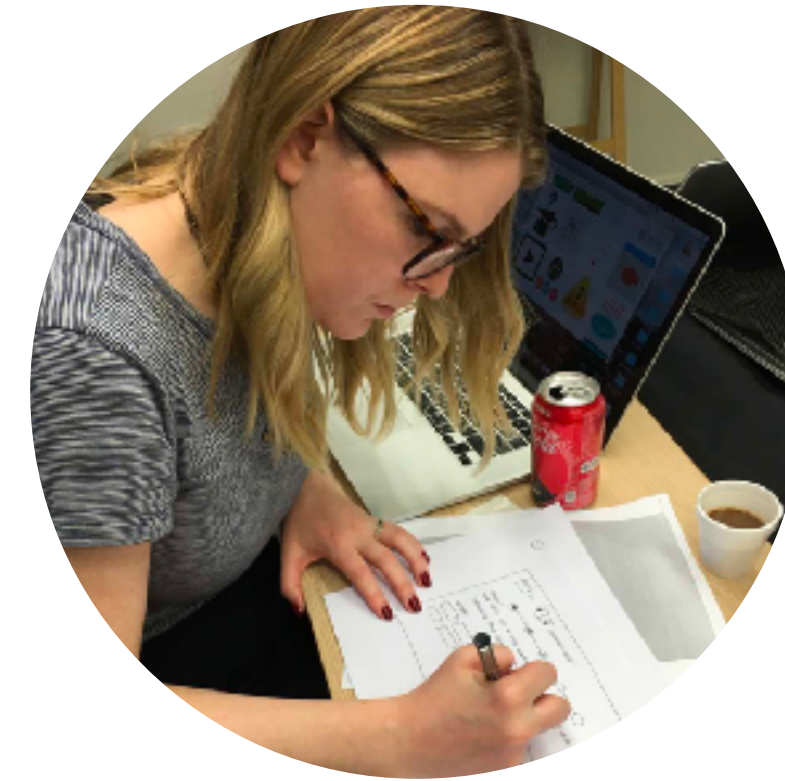
MY LEADERSHIP ACCOMPLISHMENTS
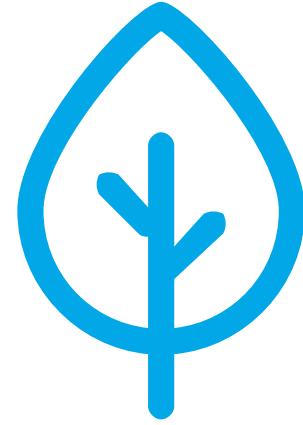
Design Growth & Health

Implemented annual Design Day for the global Thomson Reuters Design Organization. This full-day virtual event features guest speakers and multi-track breakout sessions centered around Design, Design Ops, Research, Accessibility (A11y), Content, and Health/Wellness.

My Activities & Outcomes:
- Budgeted, planned, and coordinated sessions. Volunteers within the TR Design Org facilitated.
- Conducted follow-up surveys to gauge value and inform future sessions.
- Design Day was a key indicator in the improved OHI score of the TR Design Org.
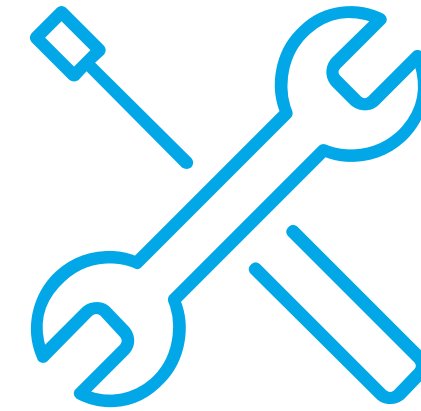
Career coaching

I work with organizations to clarify and define career progression paths and expectations for each role. Additionally I create goal frameworks that ladder up to personal, team, and organizational OKR's.

I work with individuals to identify and articulate success metrics of design-led outcomes which have attributed to their personal career growth.

Facilitated Career Architecture workshops based upon the methodologies of Mags Hanley which empower designers to map out an actionable career path strategy.

Internships & Mentoring

Created several Internship programs at various organizations through partnerships with Minneapolis/St.Paul colleges and universities. The programs typically result in a pathway to full-time employment, which is an invaluable way to retain key talent, knowledge, and build loyalty.

Reinforced a mentoring cadence within design teams at all levels to build a "latticed" approach to personal development. This covered both mentor/mentee relationship activities.

Developed, but not executed, an Apprenticeship program for TR to build a pathway for early/non-traditional design talent.

Design principles

Design Principles are essentially an organization's "north star". They are a set of guidelines that form a solid foundation which can establish trust and loyalty with customers and can help teams with decision making. Put the customer at the center of everything you create—from the visual to the verbal. Earn the trust of your audience and understand their needs, wants, goals, and questions before offering what you think is a valuable solution. The following are examples of visual and verbal principles that I like to establish with teams so that they are rooted in design thinking and aesthetics.
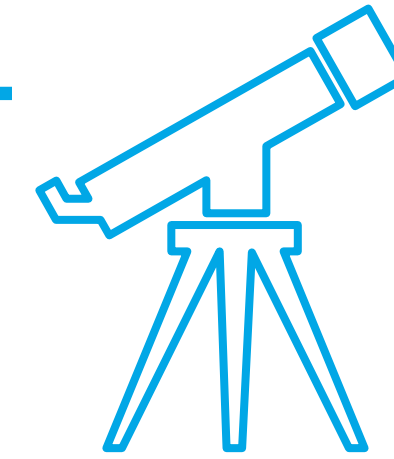
- Lead with customer benefits
- Make it clear, simple, scannable
- Move the user forward
- Write like you speak
- Don't let the design get in the way
- Users are adept at seeing a way to recover, so be open and flexible
- Be there for the user when they're ready to commit

MY DESIGN GUIDELINES & PRINCIPLES
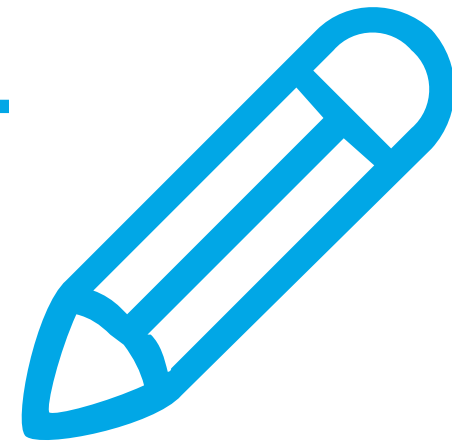
A content first approach

The words must align with the language of your customers. Messaging must be intentional, clear, and simple. Language is crucial to the digital experiences we build. When content is unclear, unfocused, or too long, it slows customers down and makes it harder for them to be successful. Just as we strive to create designs and functionality to look and act cohesively, written communication must also be intentional and consistent.
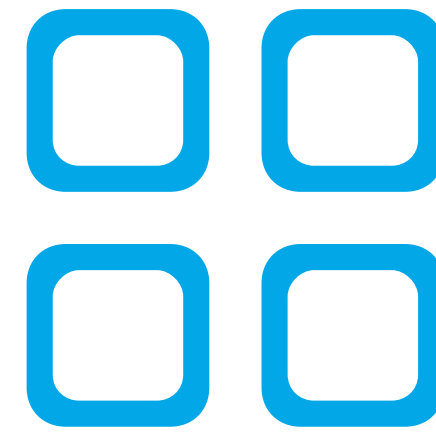
Create aesthetic appeal

The visual style must feel authentic to your demographic and market segment. Create an approachable design for customers in which the visual space draws the user in. Provide your users with strong way-finding so they understand the depth and breadth of what the product offers. Fresh and contemporary UI can create moments of delight and memorability by using micro-interactions, animations, and clear calls to action as a way to engage the user through a page or flow.
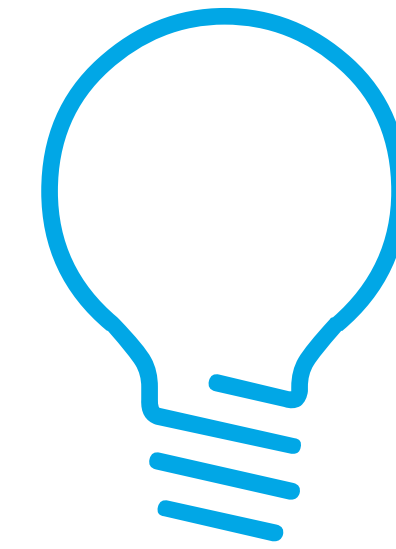
Experiment and iterate

Defining success metrics in the discovery phase is key to understanding if a solution is hitting the mark. It is critical that the Research, Product, and Design teams are tracking metrics so they can hypothesize, experiment, and iterate on a solution to achieve the desired results. Product, Design, and Operation leadership must support cross discipline teams with the time and creative space for these iterative cycles. Experimentation leads to innovation.

Integrating design ops

Implementing a Design Operations plan allows you to build processes that scale and create a shared understanding by encouraging open discovery, design, and collaboration **across disciplines**. This creates a model where work centers around the problem a customer is trying to solve or the job to be done (JTBD), rather than the platforms on which users are interacting with your organization.

My teams have achieved the highest level of success and operating efficiencies when Design + Product + Engineering collaborate in quarterly planning, refinement, and backlog grooming. The following pages will outline an Agile-based Design Ops structure that outlines the high-level phases that enable Design to get 3-4 sprints ahead of Development.
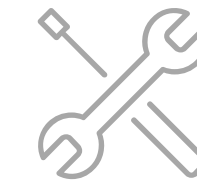
Design discovery & process

The entire design process, from discovery to handoff, is evaluated and optimized to remove as much friction as possible. Educate and elevate one another to improve each design and meet the customers' needs with innovation.
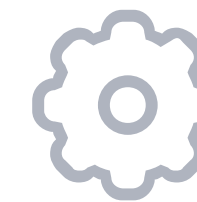
Team coordination

Administrative work and logistical planning enables the team to do their work well. This includes budgeting, resourcing, and structuring the team in a way that makes the most sense for the organization.

Design tools

Invest in toolsets that help automation happen at scale. By using drawing and mapping tools, version control, and a common platform for Design and Development, you will start seeing efficiencies for the important stuff.

Team culture

It's important to ensure that designers feel part of a larger whole. "People don't rebel against authority, they rebel against a lack of relationship". Reach out to non-traditional design partners and use techniques to build that relationship.

DESIGN OPERATION PROCESSES

(The phases that I implement based on Agile methods and ceremonies)

1. The Kick-Off (Epic level)

Present and discuss the customer needs and the business/market value. The depth of the discussion during the kick-off meeting is not exhaustive. A kick-off can happen ad hoc or during a regular refinement meeting. A **feature or opportunity canvas** provides the team with strong indicators on what research is needed, user interactions and goals, and system architecture.

Who's there:
UX/UI, Content, Research, A11y, Product Manager, Architecture/Tech Lead, SME's, Taxonomy/SEO

2. Map & Sketch

After the scope and high-level requirements are analyzed from the kick-off, the Design team jumps into focused design discovery work (solo or small groups). Activities may include:
- Market, experiential, heuristic analysis
- User research reports of prior experiences
- Journey mapping, sketching, page flows
- Service blueprint creation

Who's there:
UX, Content, UI (as needed), A11y, Architecture/Tech Lead (as needed), PM/SME's (as needed)

3. Wireframing

The process may start with high level page flows that evolve into black/white wireframes which represent the details of the entire flow including empty states, error scenarios, transitions, content, CTA's, etc. It's important that there is collaboration between design and front-end development so that service and UI/Design system components can be identified.

Who's there:
UX, Content, UI (as needed), A11y, PM/SME's (as needed), Front-end dev (as needed)

4. UX: Present, refine, test

Present wireframes along with any prepared design and A11y documentation. Architecture/Dev use this phase to respond to the design, ask questions, etc. Stakeholders are tagged as Reviewers (Content, Design Lead, A11y, Dev). User research sessions are executed and designs are refined based upon user feedback. Development should be able to begin early services/API work at this phase.

Who's there:
UX, Content, UI, A11y, Research, Architecture/Dev, PM, SME's, Taxonomy/SEO

5. UI: Prepare & Hand-off

Once the wireframes are approved, UI visual comps can be created. Content may be refined and A11y executes their final review of the designs (color, interactions, etc.). The Design team is available to Dev beyond hand-off to answer questions as implementation of the design may represent micro-interactions and states that need to be fully understood.

Who's there:
UI/UX, Content, A11y, Architecture/Dev, PM, QA, Analytics
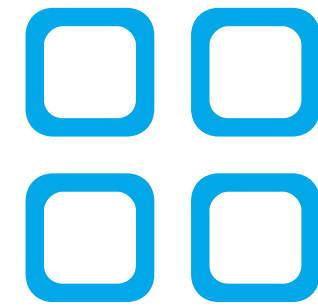
DESIGN OPERATION PLAYBOOK

(A wee sample from the plays I lead my teams with)
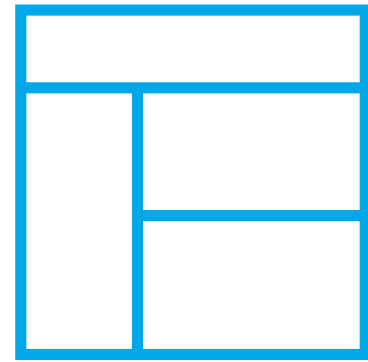
Opportunity Canvas

A one-pager to expose assumptions, risks, and beliefs about a new feature or capability you'd like to add to your product.
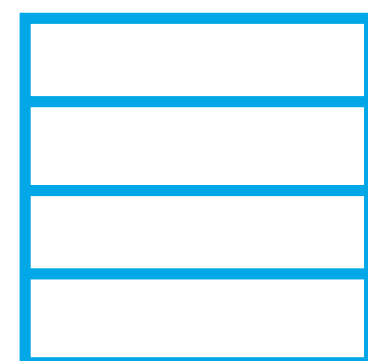
Value Matrix

A 2-by-2 table that assess the complexity of a capability based on customer value and business risk. Great for building out roadmaps.
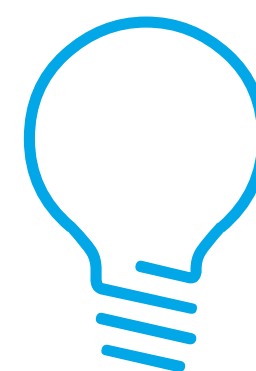
User Journey Maps

A visualization of the process a person goes through in order to accomplish a goal or a task on a timeline.

Service Blueprint

A diagram that visualizes the relationships between different service components that tied to touchpoints in a customer journey.
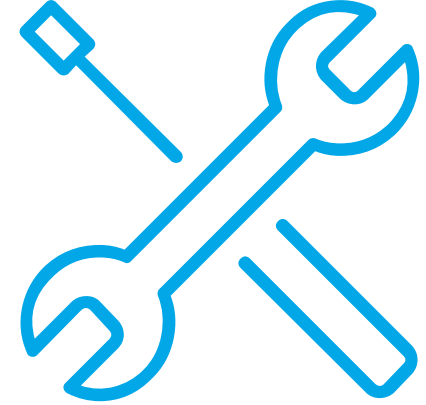
Decision Jam

Identify and define a problem, come up with a list of creative solutions, choose the best solution, and develop a series of clear action steps
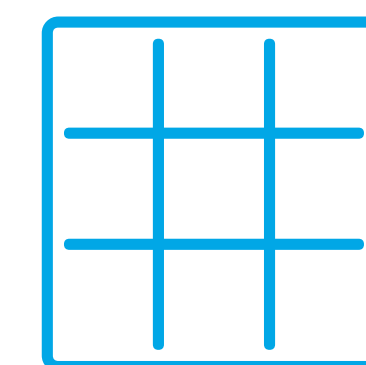
Affinity Mapping

Gathers large amounts of data (ideas, opinions, issues) and organize them into groupings based on their natural relationships.

MY DESIGN OPERATION ACHIEVEMENTS

Design Tools

Led the migration of the global TR Design Organization from **Sketch/Abstract** to **Figma**. Activities included coordinating with TR Legal and Figma Account reps to negotiate licensing and procurement. Coordinated a 5 week training series to on-board design employees (120+). Coordinated the planning for migrating all UI components from Abstract to Figma. Partnered with the TR Analytics team to get my teams access and training to **Adobe Analytics, Pendo, and Hot Jar** so Design can directly access analytics and see the results of their work in real time.
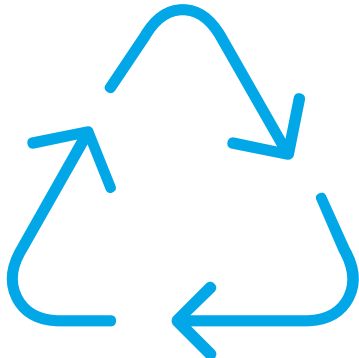
Service Design

Member of the Advisory Council which created a **Service Design Delivery Model (SDDM) Playbook**, an end-to-end method designed to standardize how TR approaches, plans, and executes projects. It captures a true-MVP iterative approach through the phases of: Plan, Discovery, Build, Test, Deploy, and Operate. This method proved its success, as seen by the launch of the TR Product Training platform in less than three months and showed strong traction with customers.

Accuracy & Speed

Created and implemented a workflow process between Design, Product, and Development that: reduced page production time by 25%, improved page template creation to better support A/B testing, and improved A11y compliance by 43%. This workflow incorporated stronger collaboration, co-creation workshops, and tagging stakeholders as Reviewers to better reinforce accountability and keep deliverables on schedule. Shortened the time to decision by providing stakeholders everything they need to make a fast and confident decision.

Work Examples

I fundamentally believe that as a design leader I am more authentic when I am able to guide teams and create great customer experiences when I keep my own design skills honed and sharp. The following is a small sample of projects in which I was an individual contributor or led the overall strategy in which the cross functional team executed the final design and deliverables.

In all cases, the projects involved deep collaboration and co-creation sessions with stakeholders and most importantly the end users.
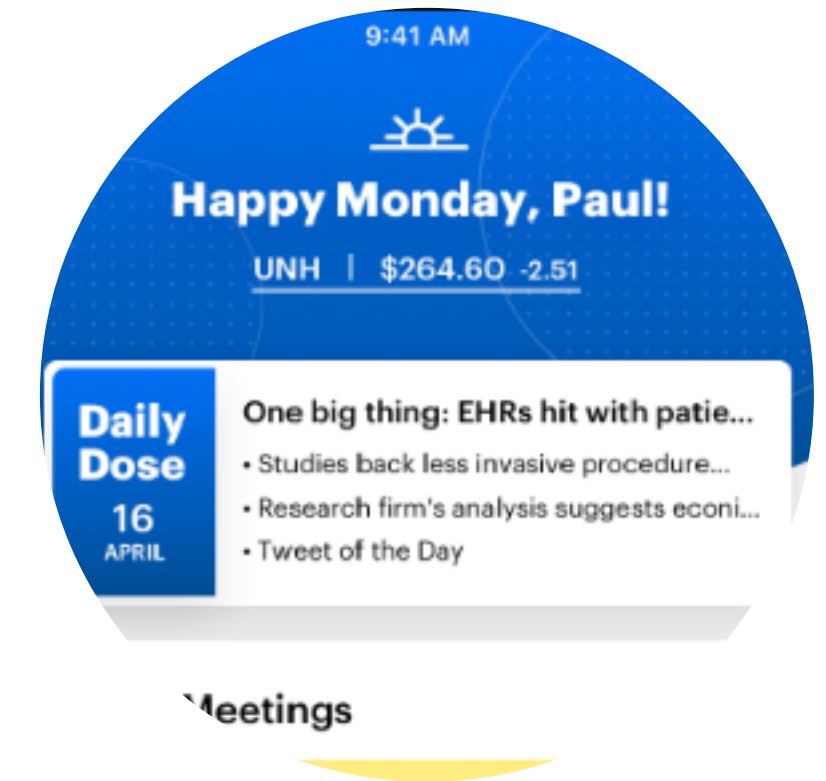
UnitedHealthcare

While Associate Design Director at Mirum Agency, I served as the Lead Designer on the discovery, UX prototyping, and UI design direction of the UnitedHealthcare Pre-Member platform. This was a fully responsive, "white label" framework that was designed to span any corporation across the U.S. with minimal implementation impact.

Design deliverables:
I created a service blueprint to map out the current state of the system in order to help visualize the content management system coupled with on-boarding new businesses to the platform.

I created a clickable UX wireframe prototype that was tested with users. After iterating post user feedback sessions, I handed the wireframes off to a UI designer on my team.
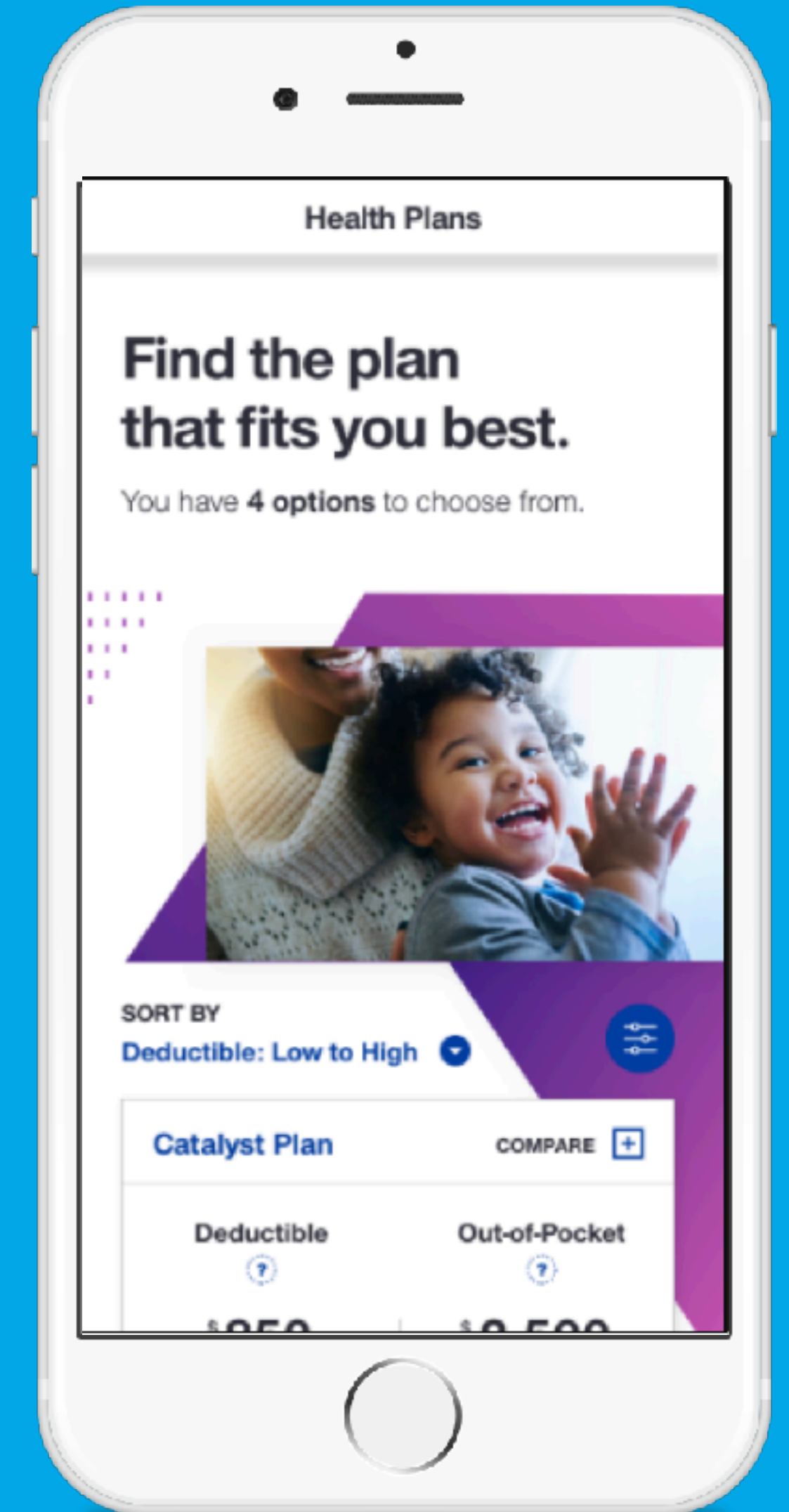
Final designs present a style that feels personal, contemporary, and decidedly "non-insurancey". UI components were created with Bootstrap and then pulled into Adobe Experience Manager.
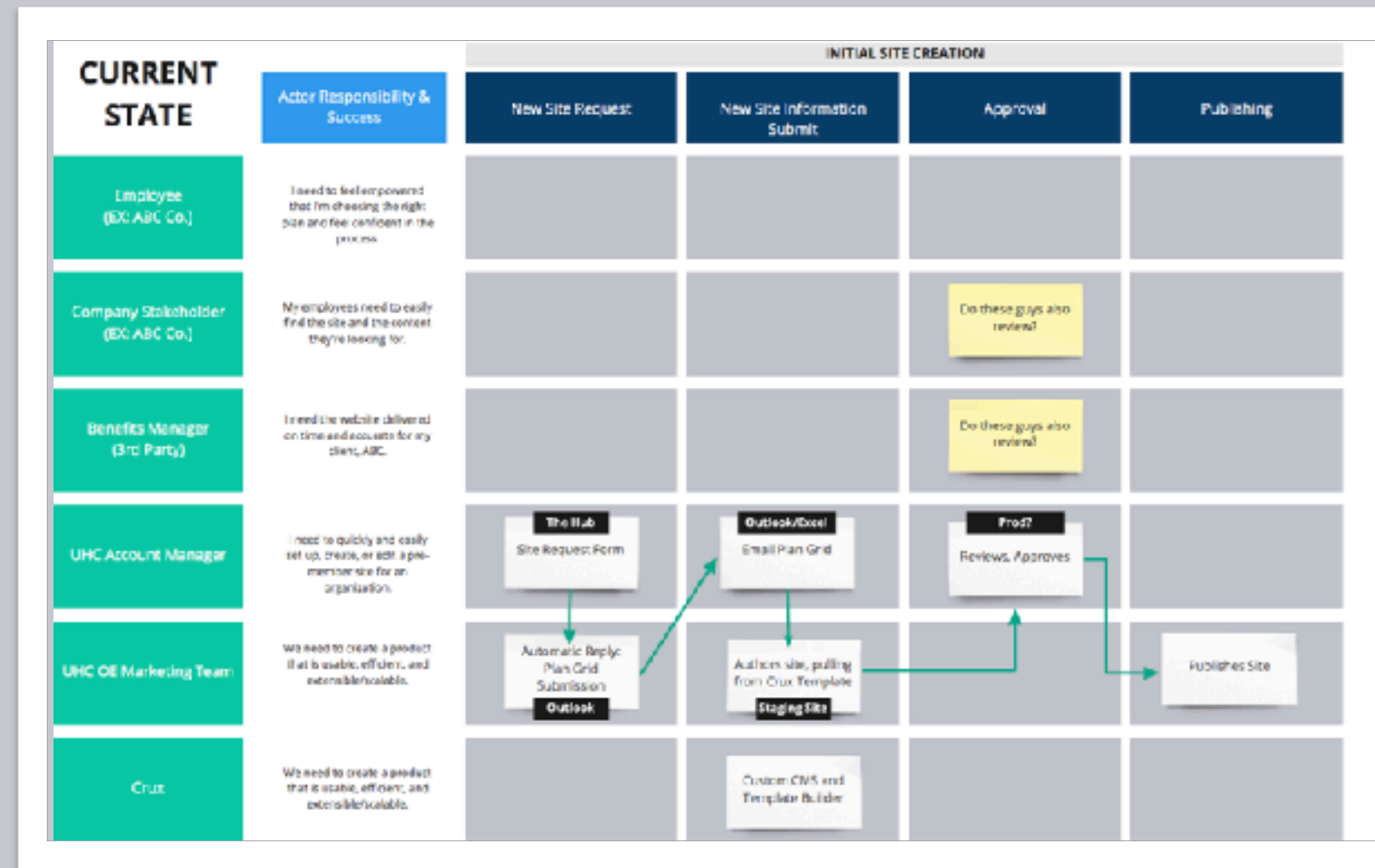
Service blueprint
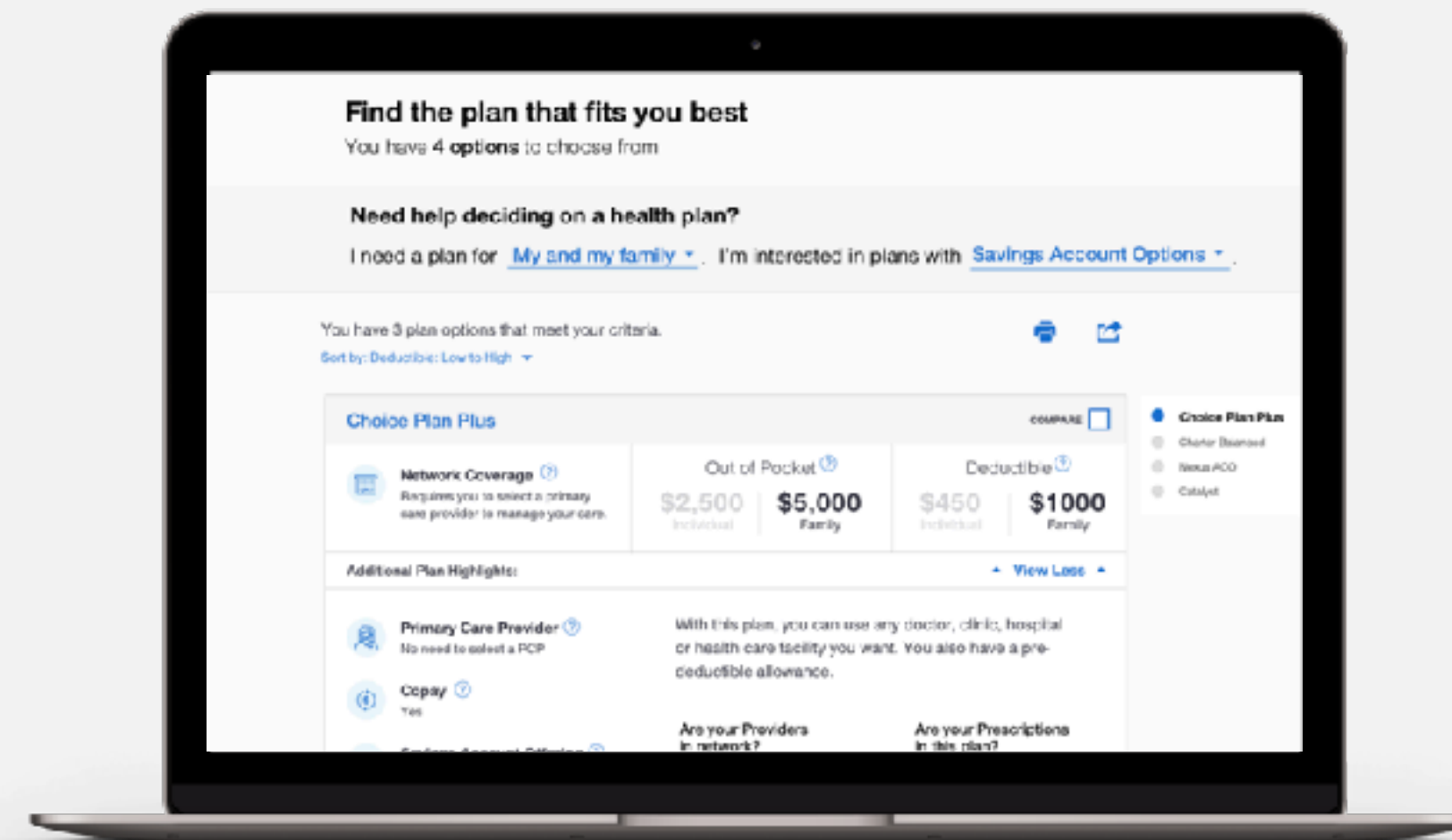
UX Wireframes for user testing

Mobile responsive UI design

UnitedHealthcare

While Associate Design Director at Mirum Agency, I served as the Lead Designer on the discovery, UX prototyping, and UI design direction of the UnitedHealthcare employee app, Sparq. The app helps UnitedHealthcare employees stay connected and informed about their personal work calendar as well as UHC events via the Outlook calendar API. The app also pulls UHC community content via the Adobe Experience Manager API.

Design deliverables:
I facilitated affinity mapping and decision jam workshop sessions to map out the MVP release. These sessions were cross discipline to keep the team informed and engaged due to a tight release timeline (5 months).

I created a clickable UX wireframe prototype that was tested with users. After iterating post user feedback sessions, I handed the wireframes off to a UI designer on my team.
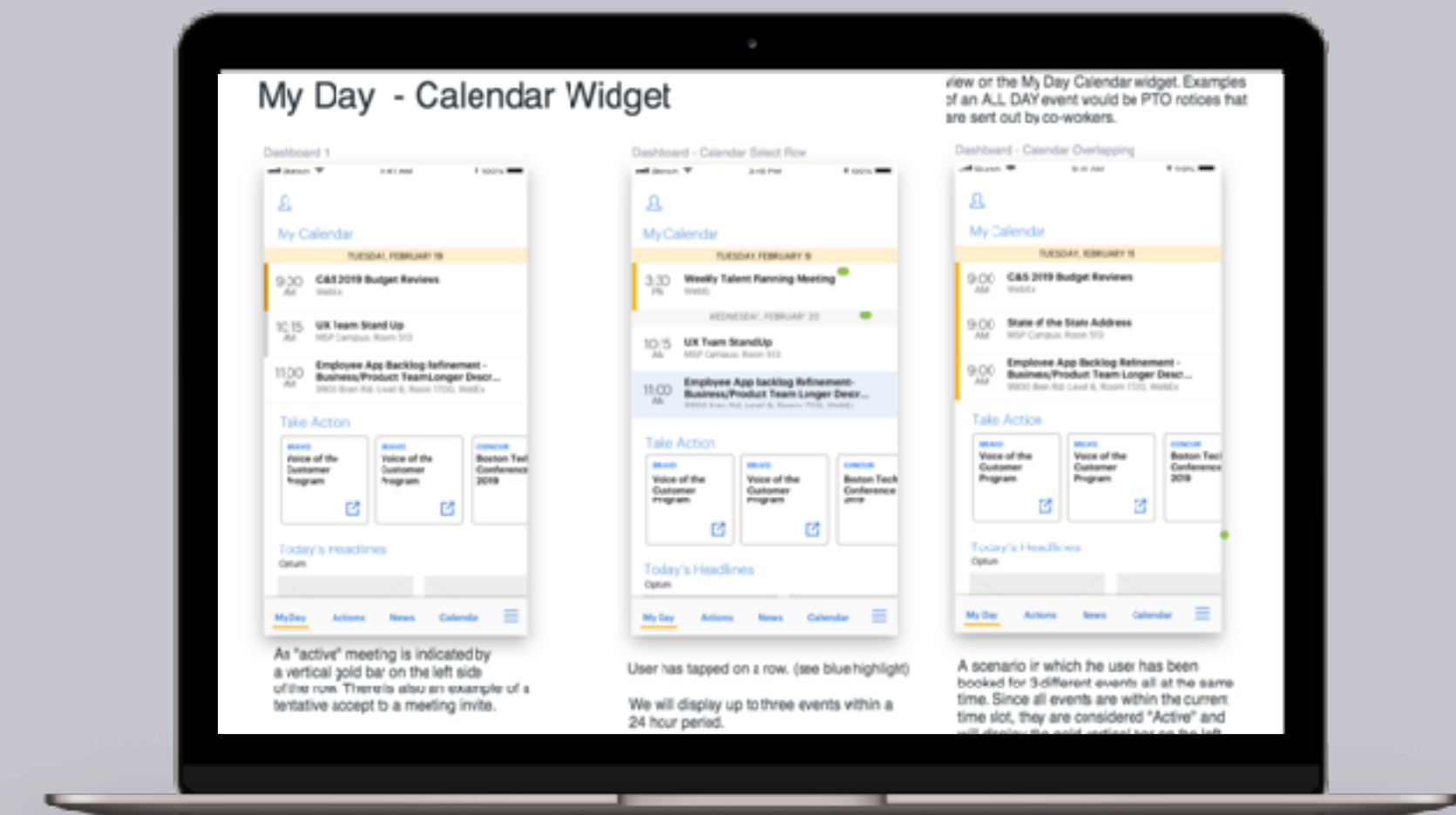
At this writing the app has been downloaded by over 50K UHC employees.
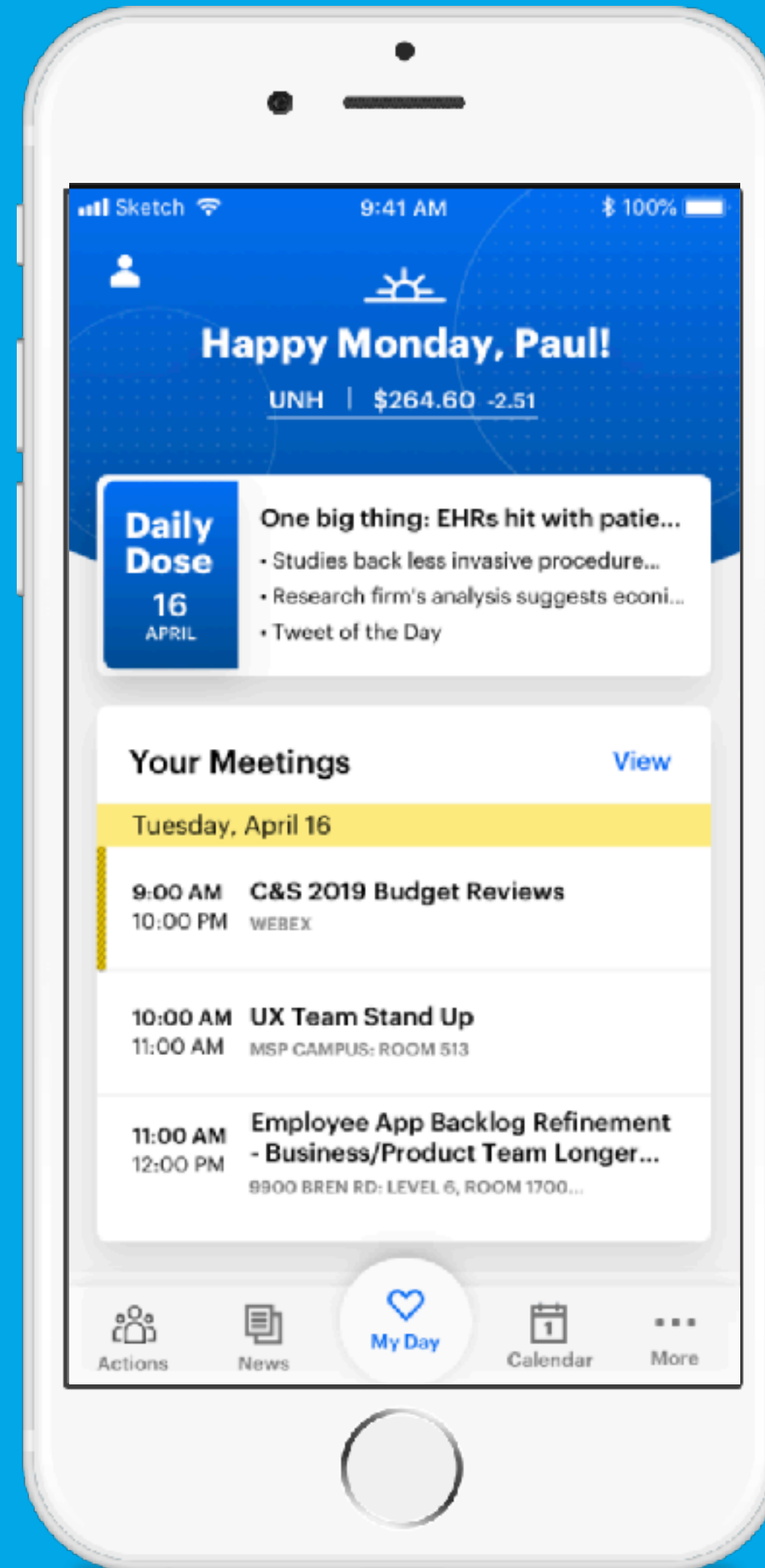
Final iOS & Android mobile design


Decision Jam and Affinity mapping

Real-time co-creation sessions with client

TR: Account

While Director of UX, Brand, and Architecture at Thomson Reuters, my design team was tasked with creating a new Account experience. The project scope included a fully redesigned CX as well as migrating all TR customers to this single system, thus allowing TR to sunset 4 legacy platforms that customers had been "pogo-sticking" between to accomplish their tasks, such as: Billing, User Management, and Help & Support.

Success metrics:

Within the first year, Account had migrated 100K+ customers and was able to sunset two legacy systems. Year two saw self-service containment at 94%, a 56% adoption of auto-pay, $94M in online invoice payments, and call center reduction of 40%.
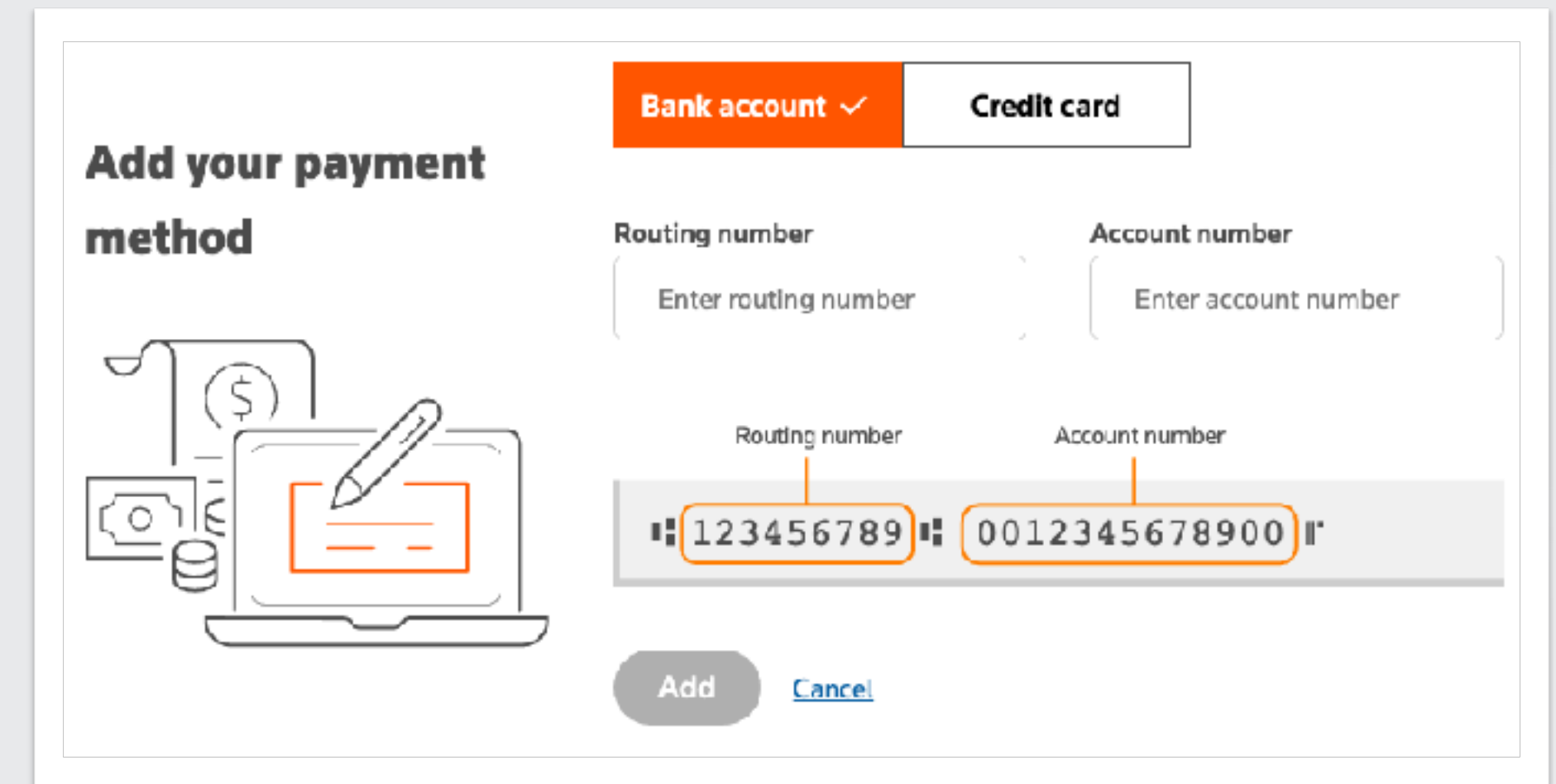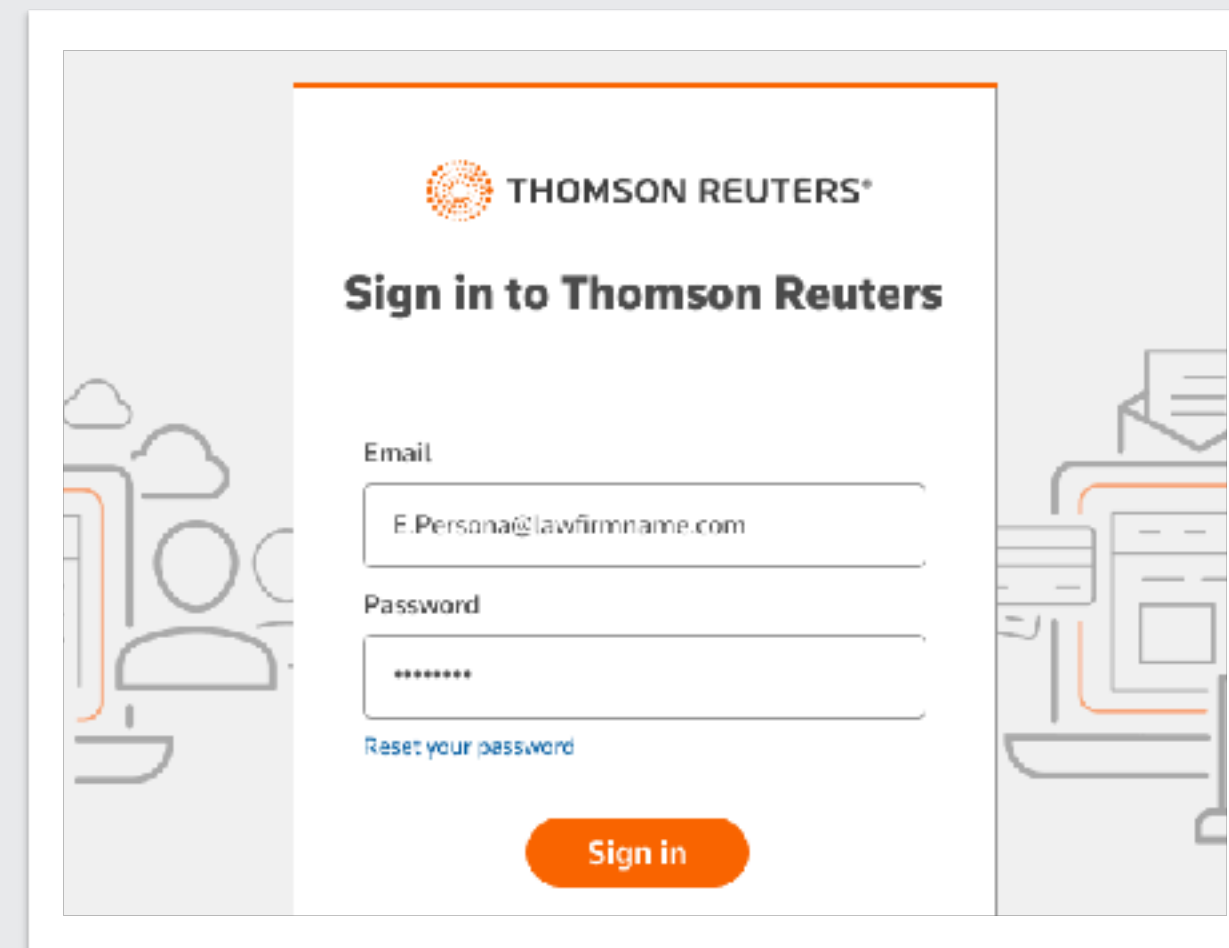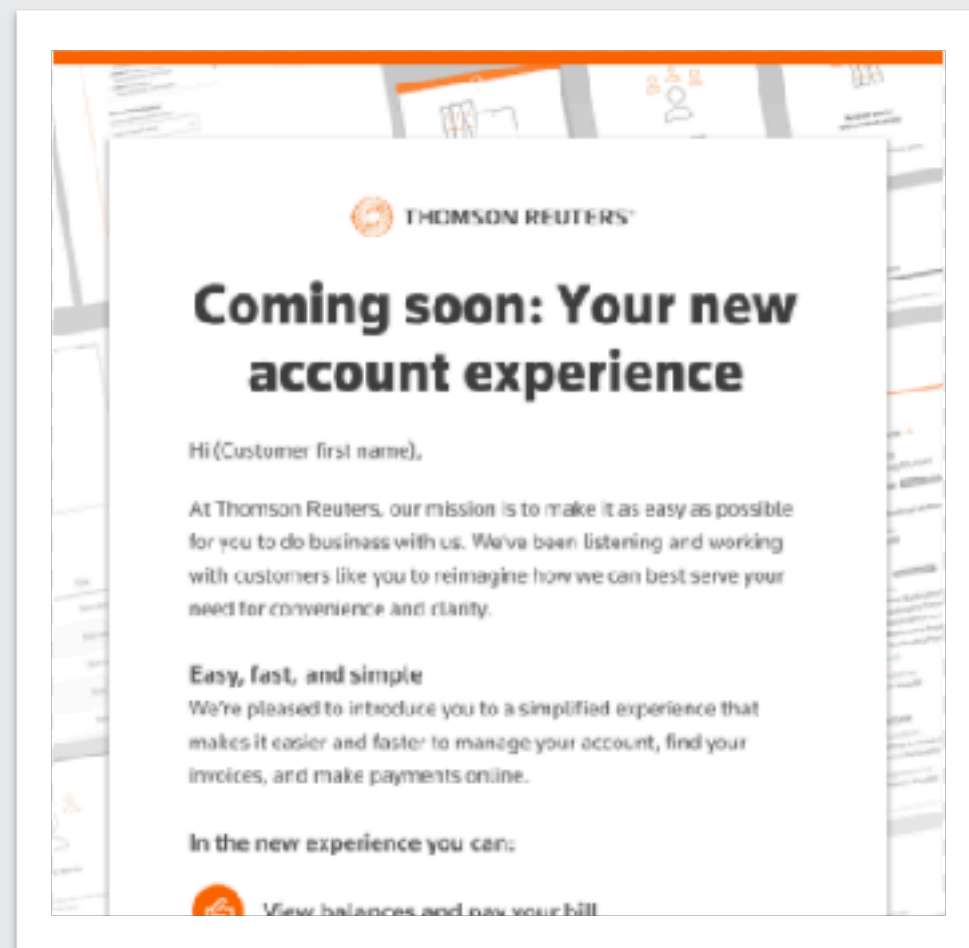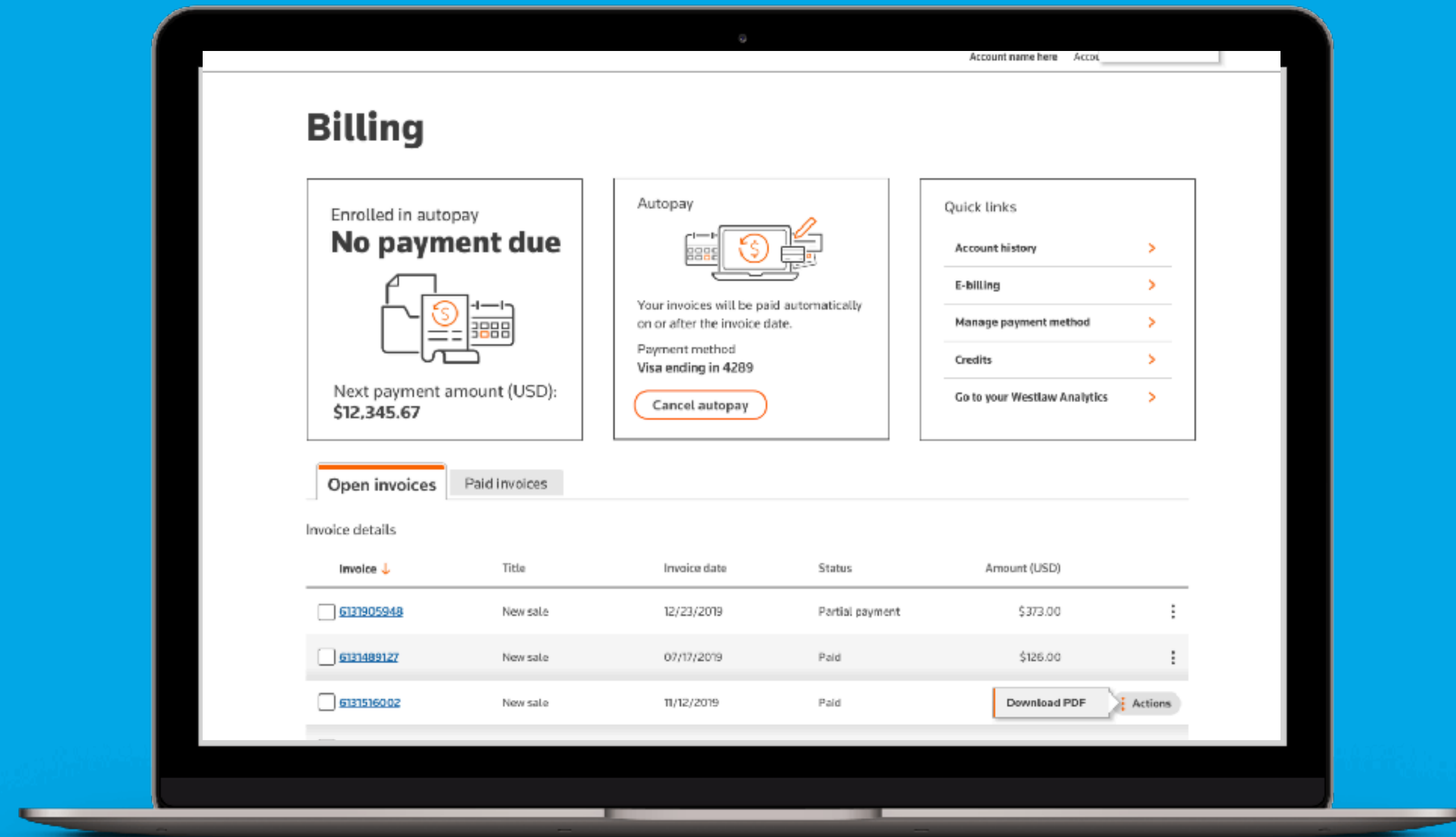
Product Marketing Playbook

While Senior Design Director at Thomson Reuters, my team was tasked with creating new templates for upper funnel marketing pages. In addition to leading my team through the design process to help drive conversions, I sought ways to trim the Development and Production cycle. An identified bottleneck was the bespoke nature in which the Marketing team requested new pages. My team created a playbook to codify the content strategy, requirements for each page type, and guidelines for visuals and CTA's.

Success metrics:

Page production time reduced by 25% and conversion rates improved by 2% in the first month.
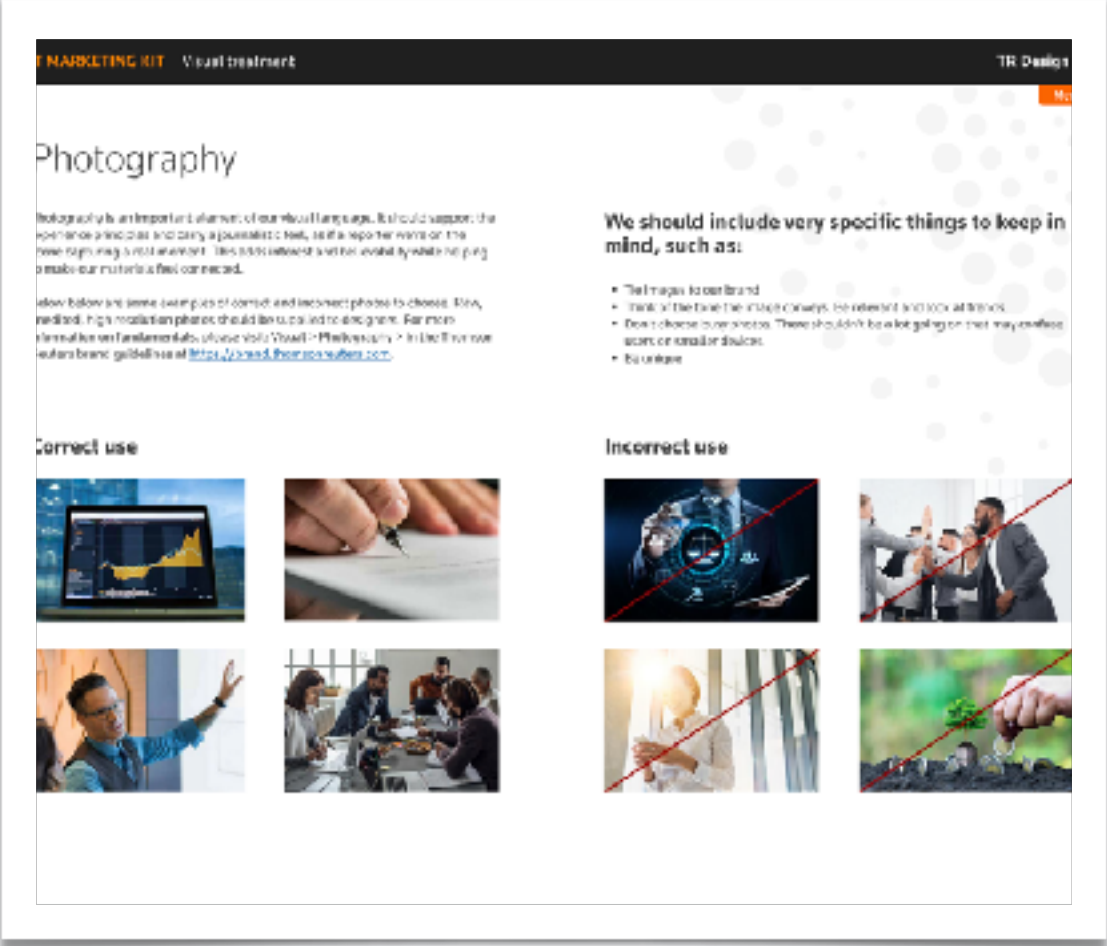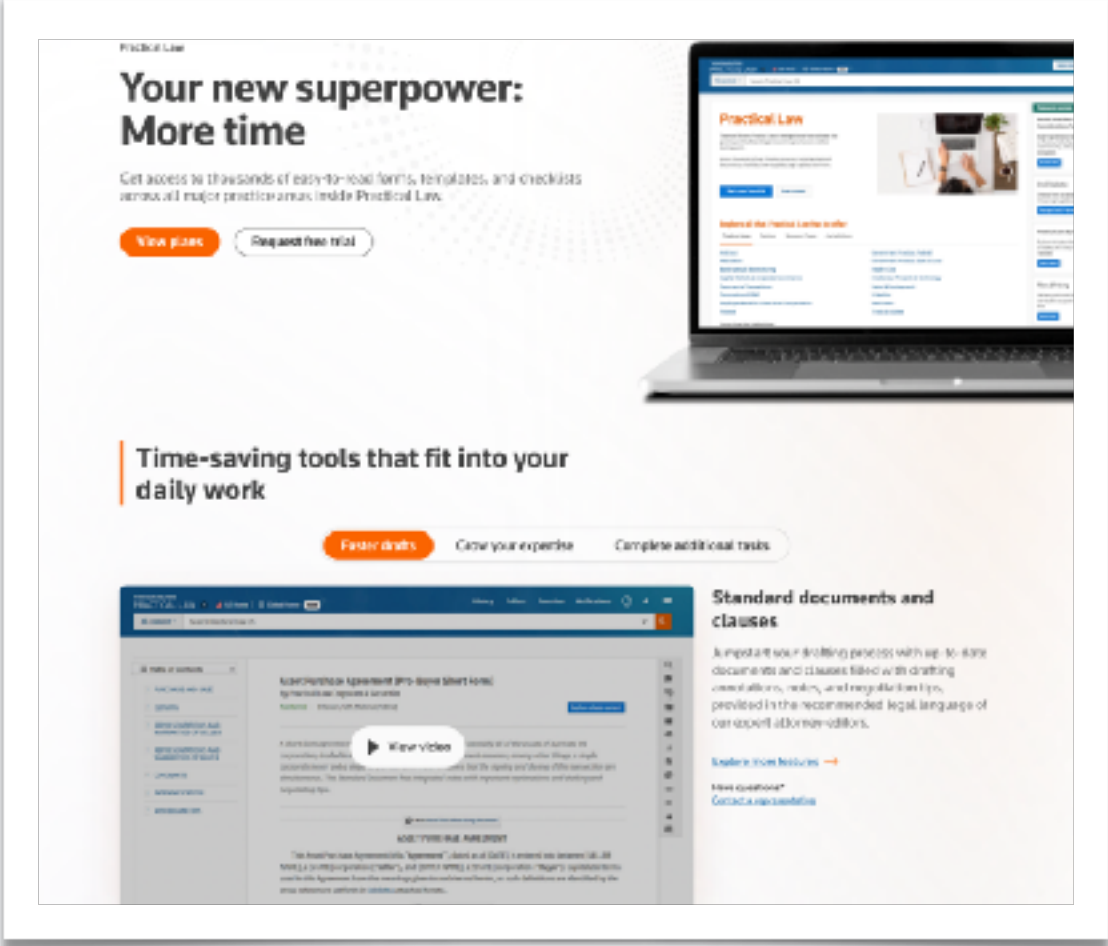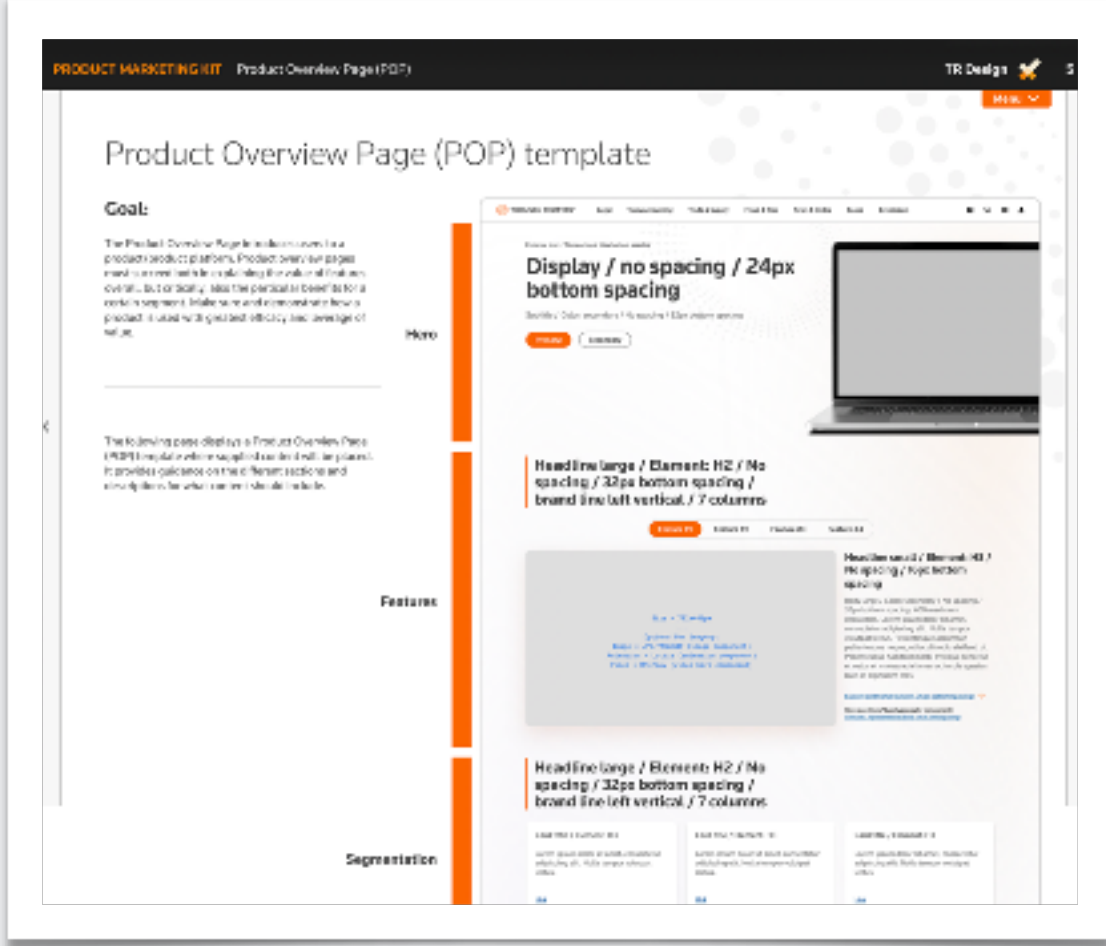
Presentations & Workshops

Being a confident, influential storyteller and facilitator is key to nurturing a design culture in any organization and getting things "unblocked". Here are some examples of workshops and presentations I've created/facilitated in the last three years:

- "Change Management as Designers" Thomson Reuters Design Leadership Organization
- "Design Day 2022: Building Your Career Matrix" Thomson Reuters Global Design Organization
- "Design Day 2021: Thinking Fast and Slow - Two systems that drive the way we think" Thomson Reuters Global Design Organization
- "Customer First Design Thinking" Thomson Reuters Global Human Resources Organization
- "Building the Flywheel: Customer Support Evolution" Thomson Reuters Customer Success Organization
- "Design Thinking in the Classroom" Superior School District; St. Thomas School of Business
- "Discovery to Design" Thomson Reuters Global Sales Leadership Team
- "Prototype Like a Pro" Thomson Reuters UnConference
- "Rethinking the User Experience for Mobile" MinneBar
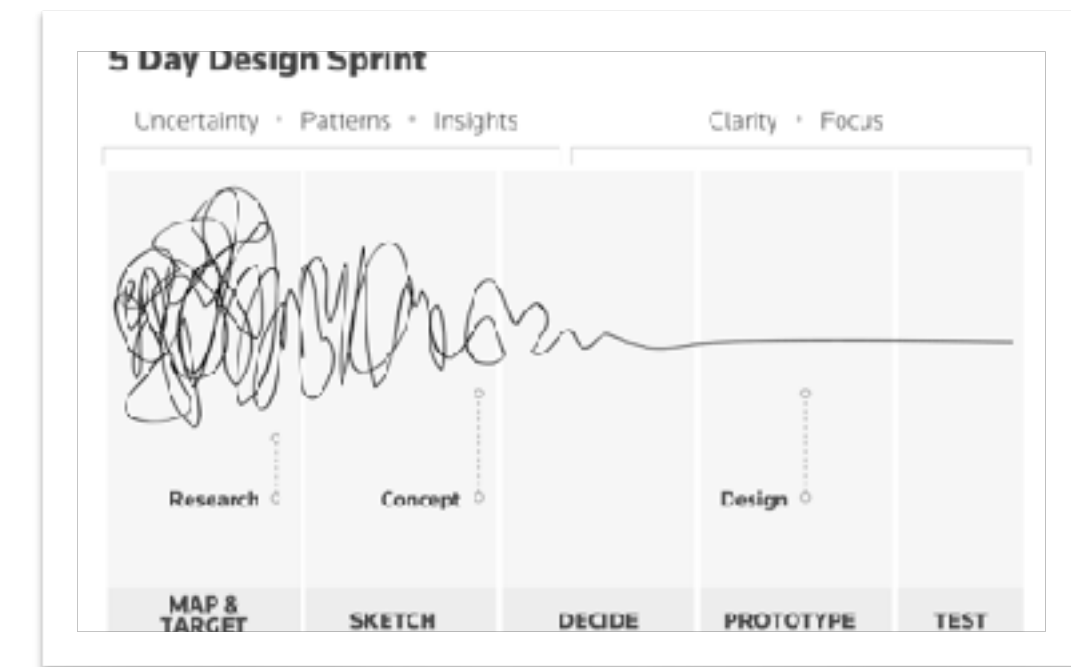
Thanks!

This was just a brief overview, so let's connect and go into more detail on projects and processes.

amy@amycsmith.com

LinkedIn: amycsmithdesign