

# Jaza Samuel

Design researcher



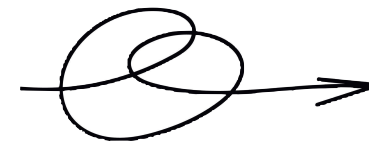
BFA, Industrial Design

MS, Human Computer Interaction

# About me



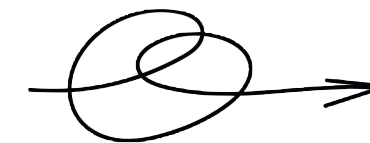
BFA, Industrial Design



MS, Human Computer Interaction



UX Researcher, Google



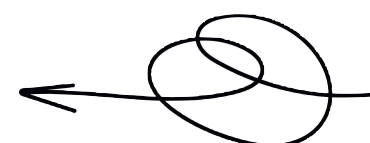
UX Researcher, Goldman Sachs



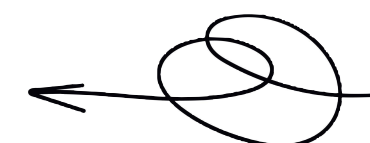
*Would like to do something in research + art*



Meta



StudioQ



Senior UX Researcher, TheGuarantors





# Projects

1. Increasing applications and engagement
2. Increasing cross-sell

**Project 1**

# **Increasing applications and engagement**

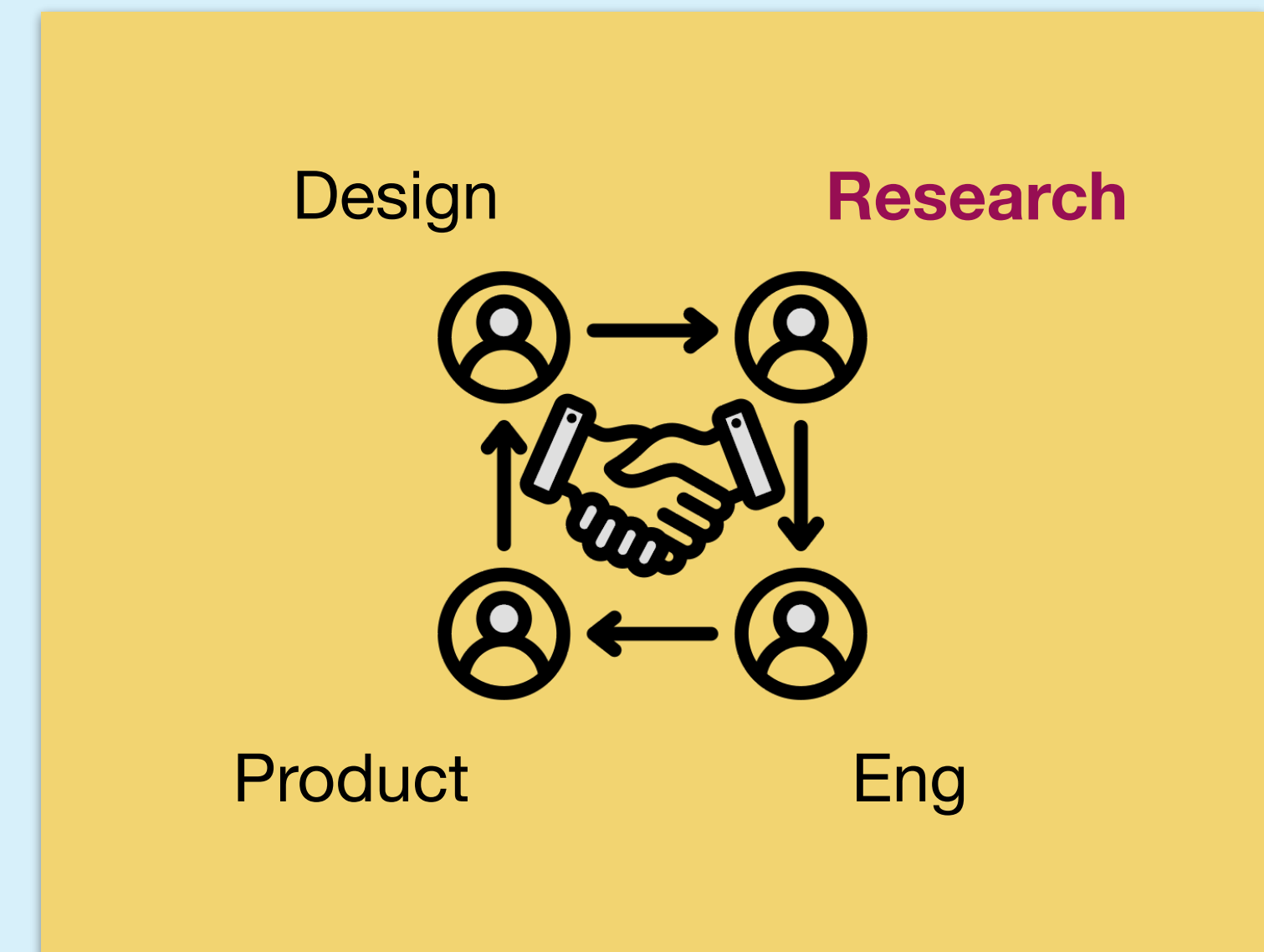
# Context and my role

## Business

Startup with the mission to make more apartments accessible to renters, who may not qualify for a lease, while also offering protection to landlords against rent defaults.

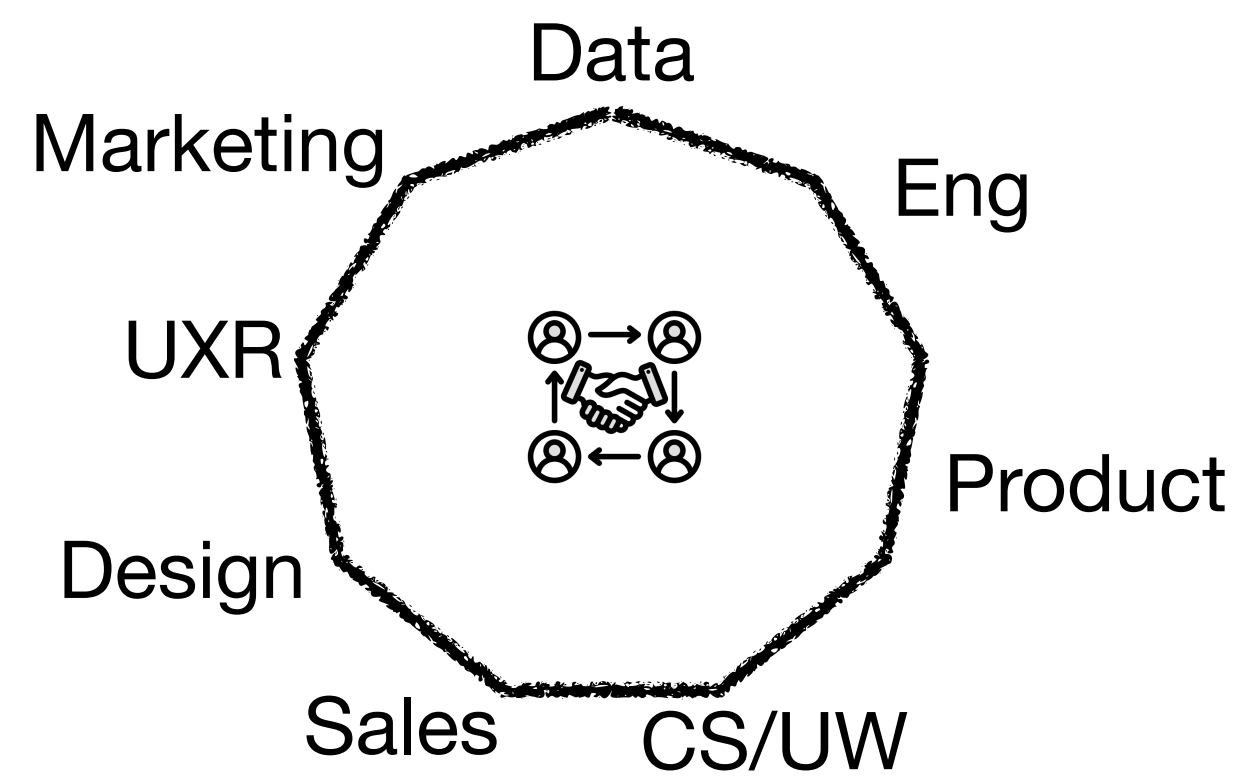


## Team



**Problem**

# Problem - low engagement, high inquiries



**Decrease** in # of logins

**Decrease** in # of applications

**Influx** of inquiry emails

# Research questions

# Research questions + goals



## Process

What tasks are teams taking for denied/conditional applicants?

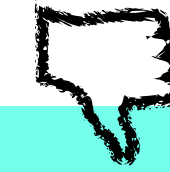
What are their needs regarding default renters?



## Key attributes

How do they make decisions?  
What do they care about?

What are some key attributes of the customer segments?



## Pain points and friction

What are their biggest challenges in their workflows?

What difficulties do users have when using the portal?

# Research questions + goals



## Process

What tasks are teams taking for denied/conditional applicants?

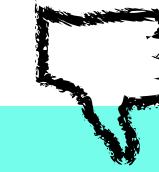
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## Pain points and friction

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## Goals

Gather critical user journeys

Establish key personas

Identify usability improvements

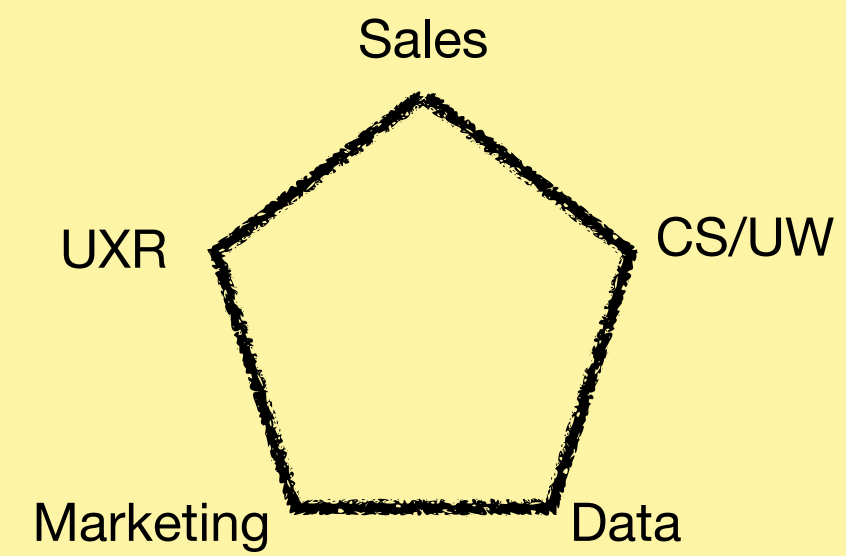
Key Metrics	Anticipated impact
Decrease in # of logins	Increase portal engagement
Decrease in # of applications	Increase applications
Influx of inquiry emails	Improve usability (decrease email inquiries)

# Project Planning

1 week

## 1 Information gathering

Understand customer segmentation



2 weeks

## 2 Planning + recruitment

Generate study plan

Establish knowns and unknowns and recruiting criteria

5 weeks

## 3 Execution

Conduct sessions



## 4 Synthesis

Synthesis and research share out

# Execution

# Research methods



**Moderated 1:1 in-depth  
interviews**



**Contextual inquiry**

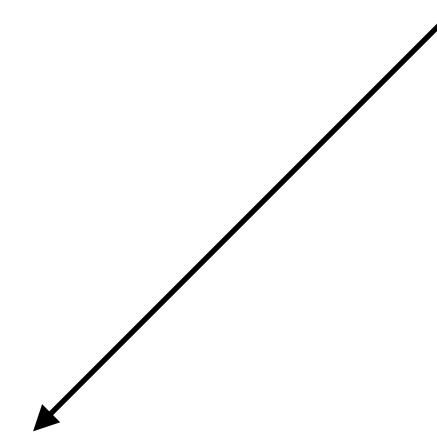
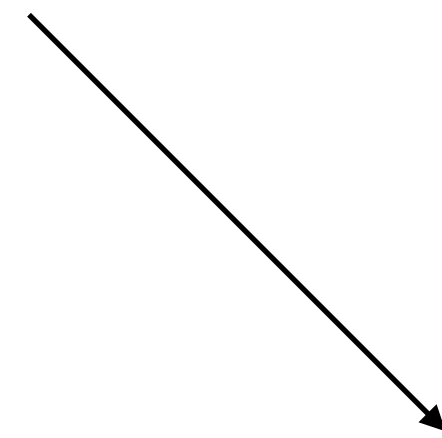
# Research methods



**Moderated 1:1 in-depth  
interviews**



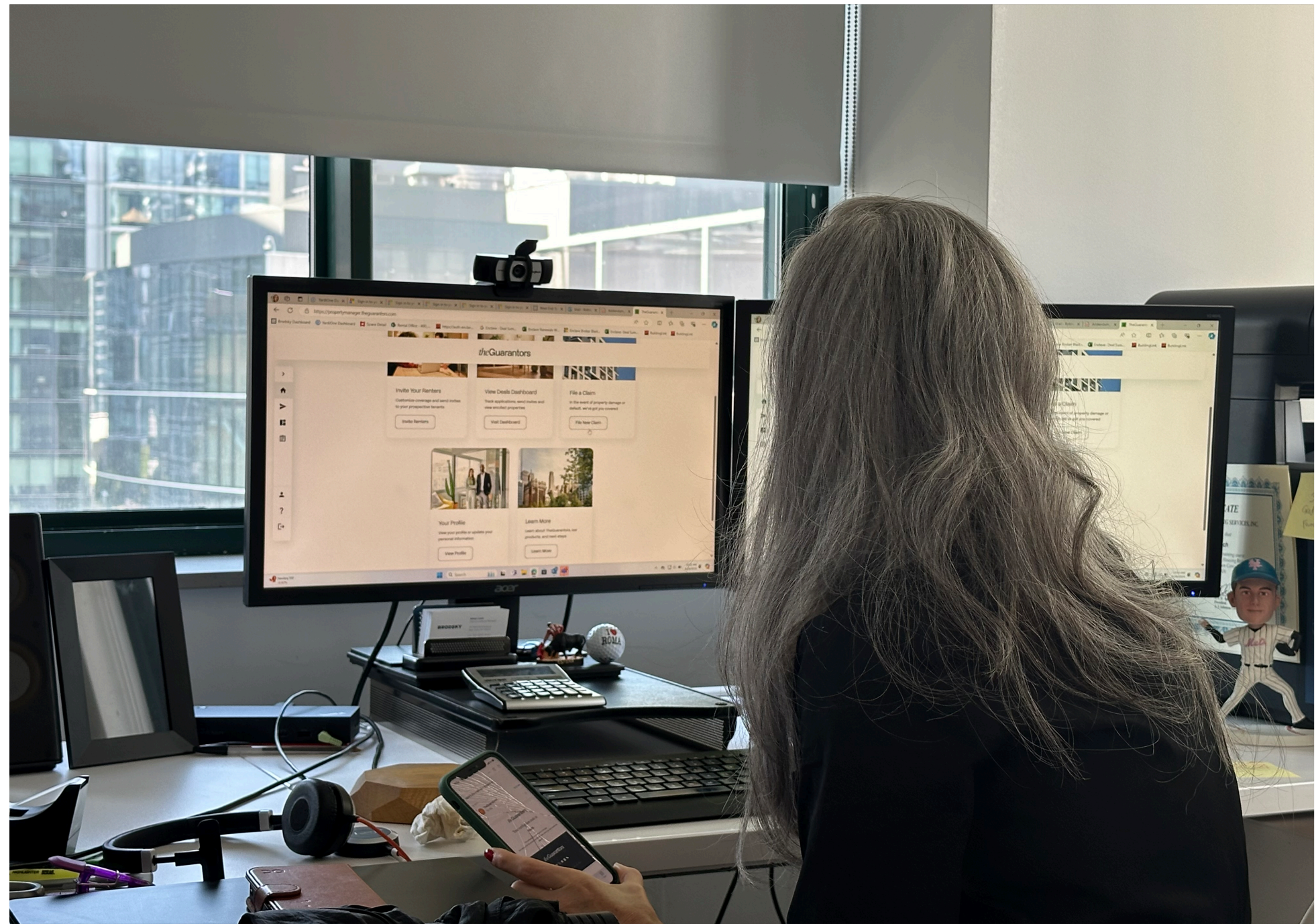
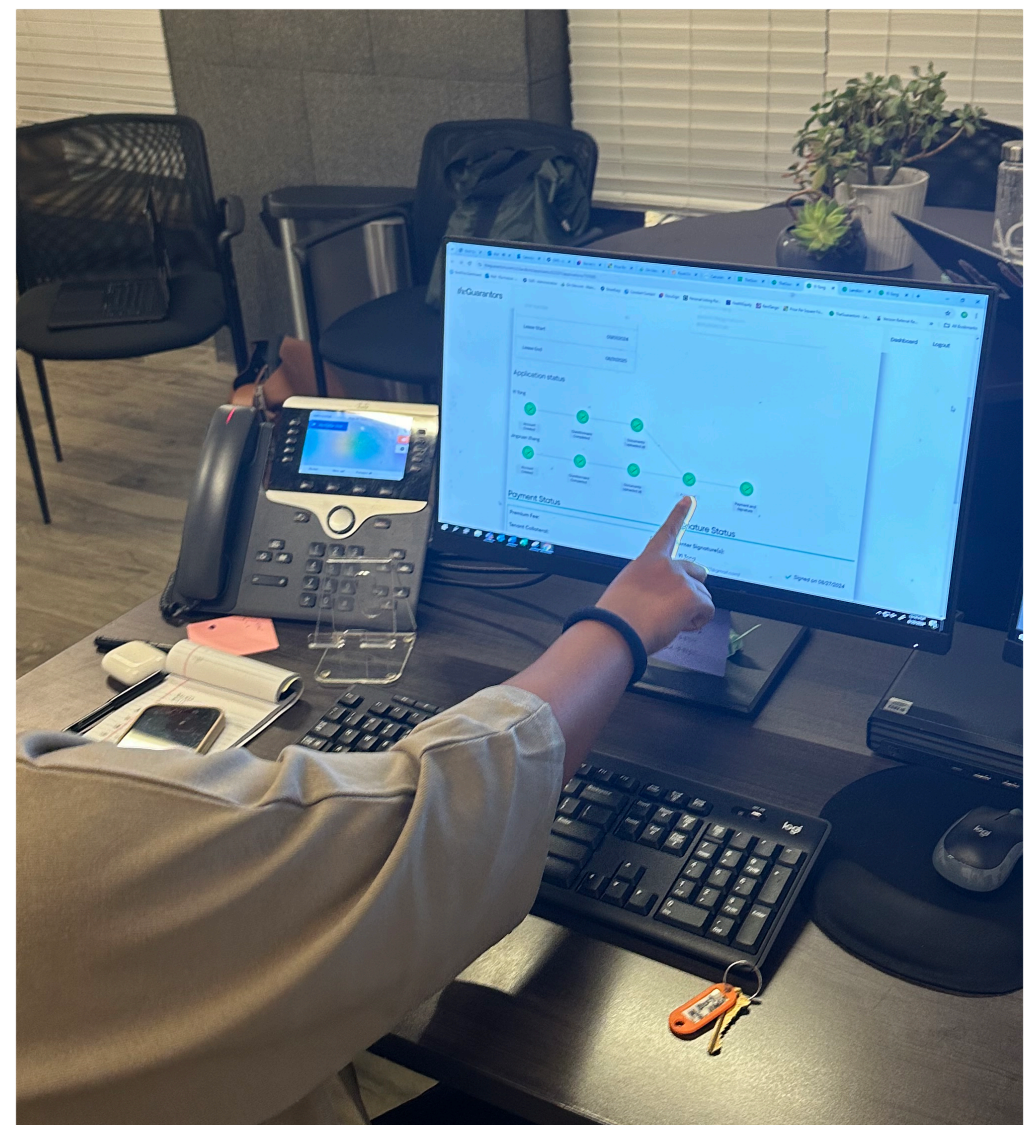
**Contextual inquiry**



**Hybrid of remote  
sessions and in-person  
visits**

# Recruitment

<b>n=40</b>	4 user segments Moderated, current customers Account opened in last 1 year
<b>Scheduling</b>	60-90 minutes
<b>Tools</b>	Zoom, Figma, Dovetail



# Study Guide

## **Part 1: behavioral questions**

What is your day to day look like?

What is the process of approving a renter for a lease?

Tell me about a time when approving a denied/conditional renter was challenging? What did you do?

How do you make decisions?

What is the reporting structure at your organization?

What other tools/platforms for you use for leasing tasks?

# Study Guide

## **Part 1: behavioral questions**

What is your day to day look like?

What is the process of approving a renter for a lease?

Tell me about a time when approving a denied/conditional renter was challenging? What did you do?

How do you make decisions?

What is the reporting structure at your organization?

What other tools/platforms for you use for leasing tasks?

## **Part 2: task-based usability study**

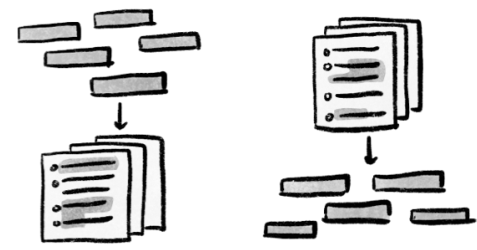
What are most frequent tasks in the portal?

Show how you would perform frequent tasks - discoverability

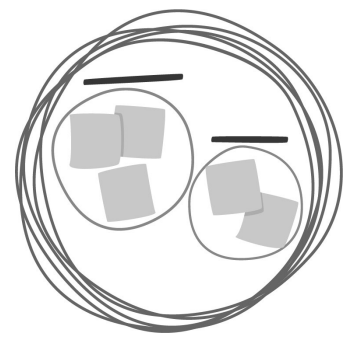
Rating on difficulty

# Synthesis

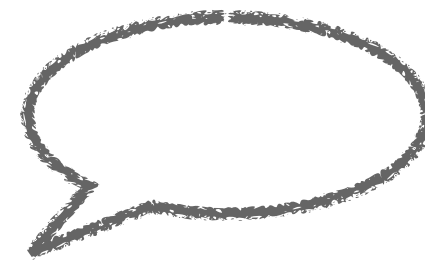
# Data synthesis



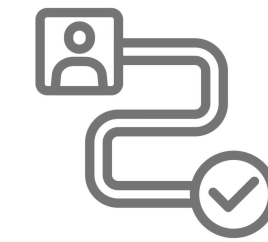
Qualitative coding




Affinity mapping



Quotes, screenshots, clips



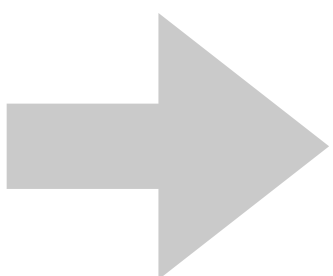
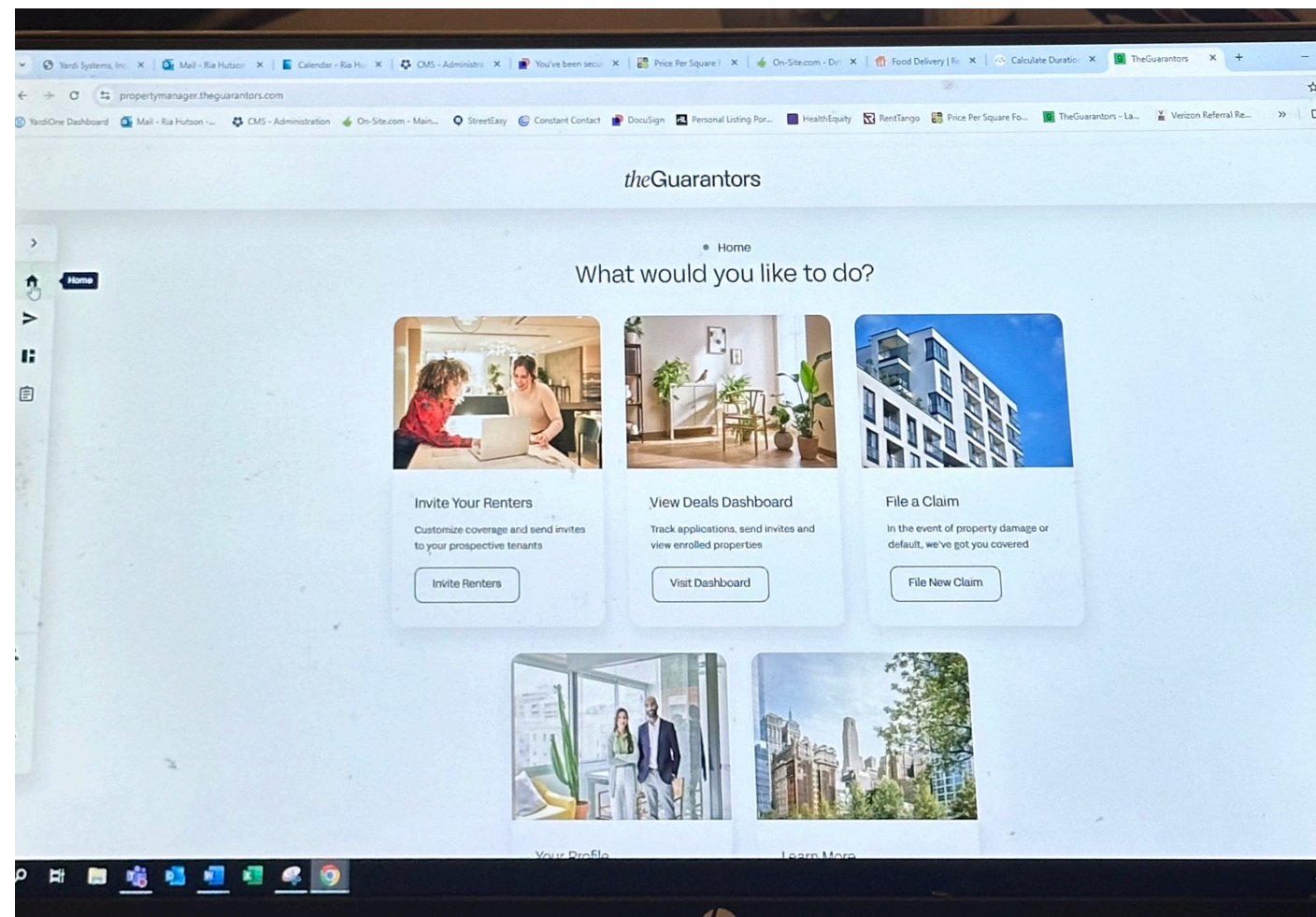
Process and persona mapping

Finding	Recommendation	 Impact
Participants <b>frustrated with the lengthy forms</b> to invite applicants due to redundant form fields.	Consider making form more concise by omitting redundant input fields.	<b>30% increase in applications</b>

*“I tried using this before but remember being kind of annoyed because I really don’t need to fill all of this out. I email my AE to invite the applicant instead.”*

Finding	Recommendation	🏆 Impact
<p>Finding renter application status in the portal is <b>critical information but very difficult to discover.</b></p>	<p><b>Consider surfacing information</b> eg. table format promotes scannability and discoverability.</p>	<p><b>Increase in logins by 23%</b></p> <p><b>Email inquires decreased by 40%</b></p>

*“I never login because i can never find what I really need [renter status]...I just email Doris instead and she helps me out immediately.”*

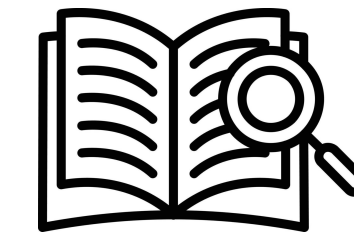


		●	
		●	
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# Retro



More structure field visits and longer scheduled slots.



Deeper understanding of jargon and industry language

**Project 2**

# **Increasing cross-sell**

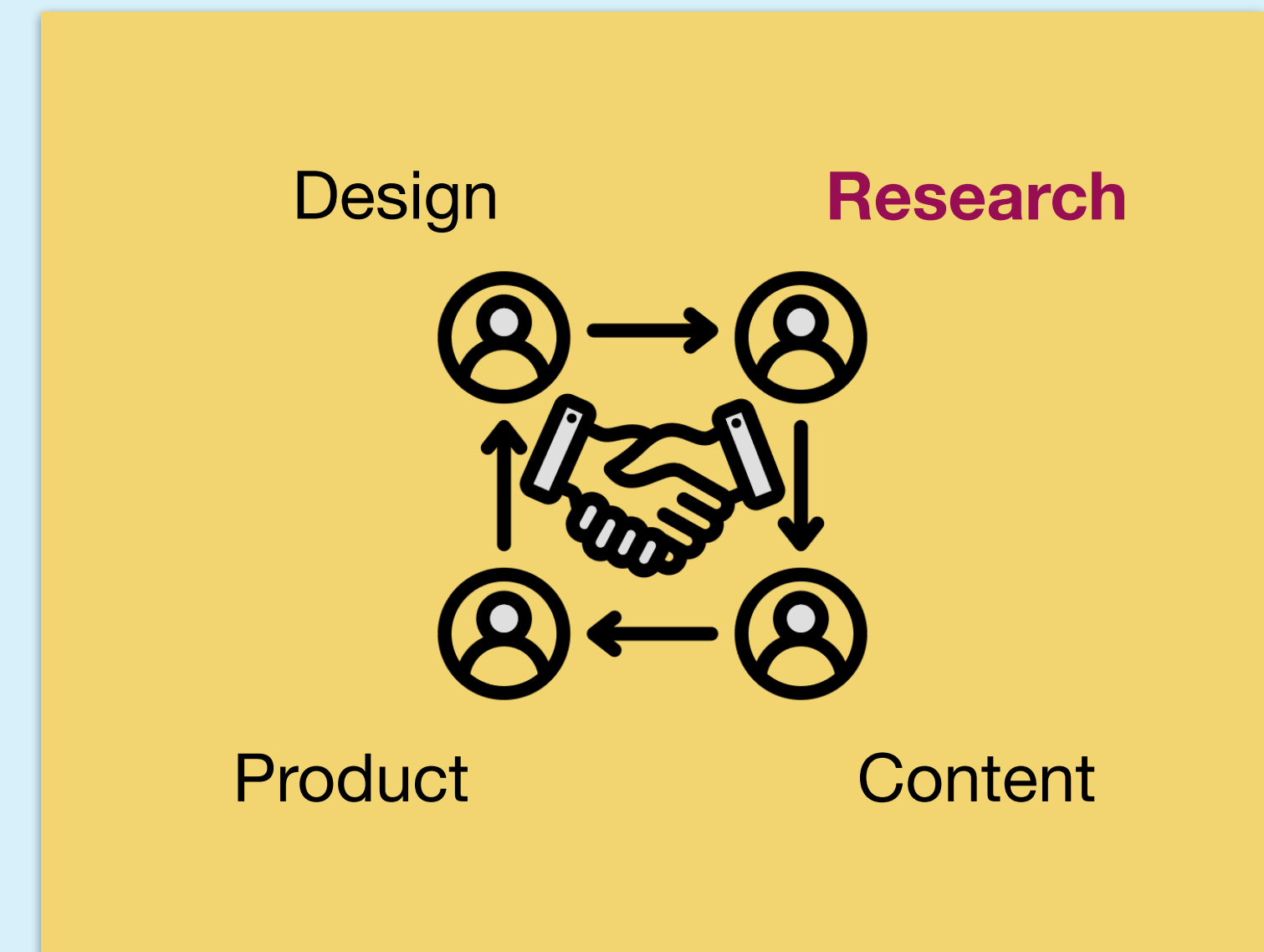
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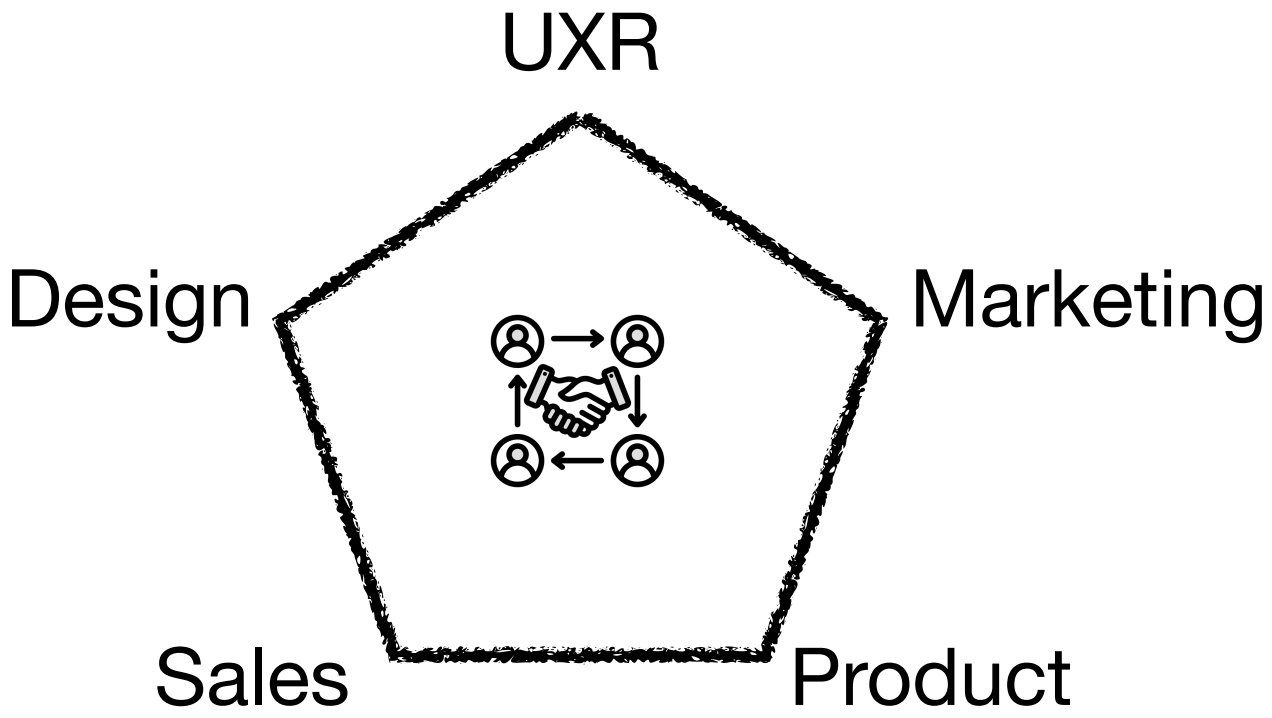


## Team



**Problem**

**Problem - low click rate leading to no conversion**



**Low click-rate on cross-sell**

# Research questions

# Research questions + goals



## Purchasing behavior

At what point in the journey do users decide to make purchase?

What factors influence users to make purchase?

# Research questions + goals



## Purchasing behavior

At what point in the journey do users decide to make purchase?

What factors influence users to make purchase?

---

**Goal**

**Improve discoverability of cross-sell widget**

Key metric

**Anticipated Impact**

Low click rate on cross-sell widget

**Increase conversion via  
cross-sell experience**

# Project Planning

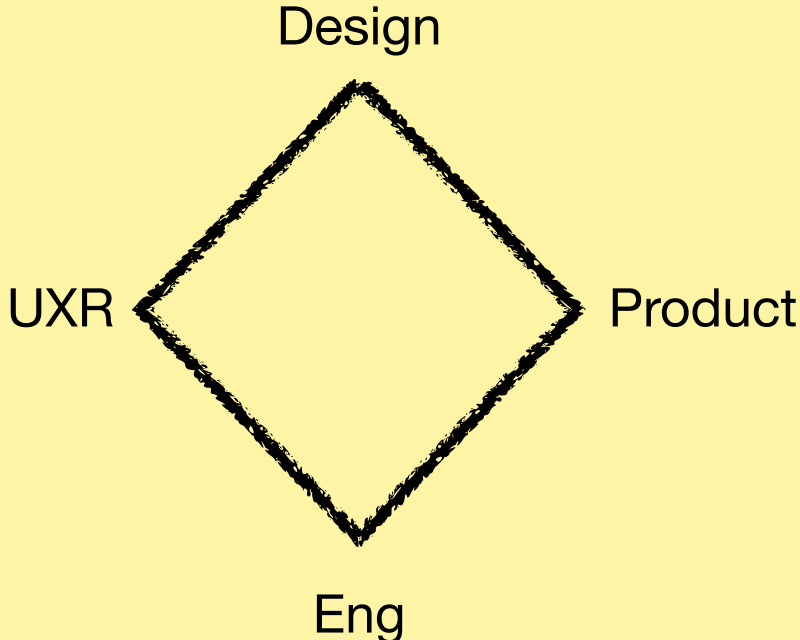
# Rapid Research Program

Week 1

Week 2

## 1 Scope

Understand design options



## 2 Planning + recruitment

Generate study plan

## 3 Execution

Conduct

## 4 Synthesis

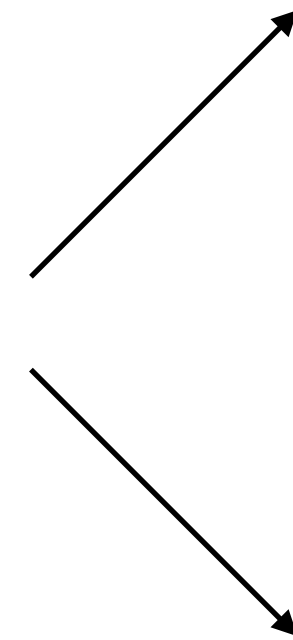
Synthesis and research share out

# Execution

# Research methods



**Unmoderated concept validation  
usability test**



# Recruitment

n=16	within subjects, counterbalanced
	unmoderated, non-customers
	Had difficulty getting approved for a lease
	Currently pay for renters insurance
Tools	<a href="https://www.usertesting.com">usertesting.com</a>

# Study Guide

## ***[Scenario based tasks]***

Provide initial impressions and understanding. What would you do next?

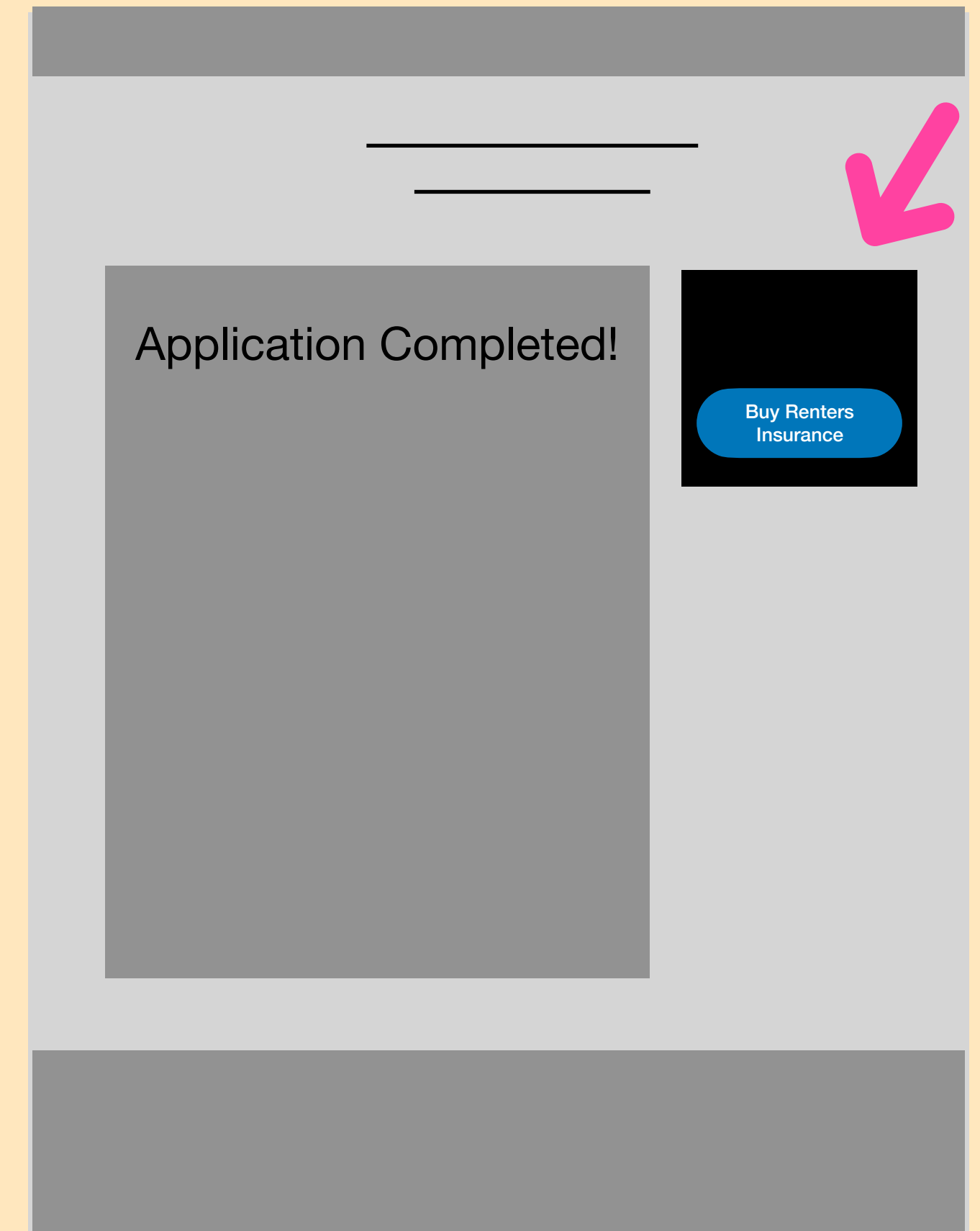
## ***[Design A/B counterbalanced]***

***[Task]*** Now let's imagine you want to purchase renters insurance. How would you do that here?

*[rating on understanding and comprehension]*

## ***[Post task questions]***

***[verbal response]*** Which option was clearer? why?

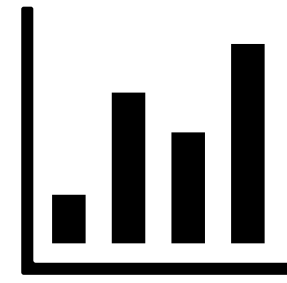


# Synthesis

# Data synthesis



Task and path analysis




Average ratings



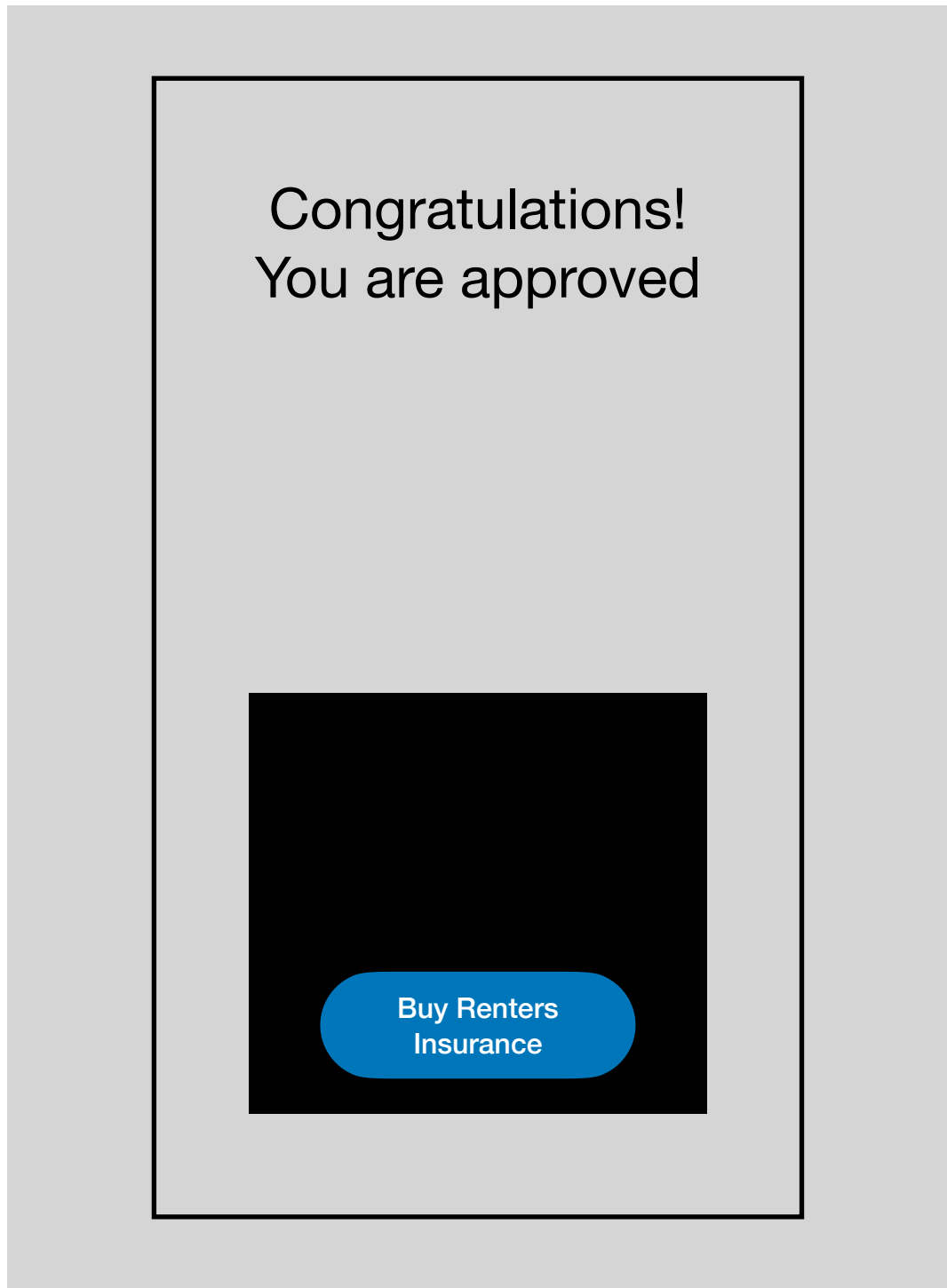
Word maps



Quotes, clips

Finding	Recommendation	 Impact
<p>Though participants found design A easier and more appealing, overall, purchasing renters insurance is <b>not top of mind</b>.</p>	<p>Consider providing cross-sell opportunity at the time of receiving approval.</p>	<p><b>8% increase in conversion in 30 days</b></p>

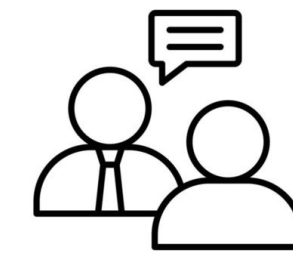
*"I'll probably do that later...I don't think I am even approved for the apartment yet."*



# Retro



More time to dig deeper



No chance to follow-up

# End.

Jaza Samuel



BFA, Industrial Design  
MS, Human Computer Interaction