REGULAR JOE
CONSULTING, LLC

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UX Design Portfolio

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# Joe Sokohl

About my experience

For 20 years, I have concentrated on crafting excellent user experiences, using content strategy, information architecture, interaction design, and user research. I help companies effectively integrate user experience into product development. In addition, I've led teams as small as three in the same room to as large as 25 across three countries and six sites.

I see my expertise as helping companies understand who will use their product, how they'll likely interact with the company while using that product, and what benefits the company might realize by effecting an excellent experience for that person. I believe in "UX for the rest of us." I concentrate on productivity tools, Web apps, internal interfaces that folks use in order to do stuff, rather than on the marketing and branding expressions a company might impart.

About my skills

Skill	Rank Beginner	Some Skills	Proficient	Expert	Guru
Leadership					
UX Strategy					
Research					
Prototyping					
Content Strategy					
Big IA					
Little IA					
Interaction Design					
UI Design					
Front-end Coding					

Since 2009, I've been the principal for Regular Joe Consulting, LLC. I previously held UX-oriented positions based in Boston, MA; Hamburg, Germany; Chicago, IL; Durham, NC; and in Richmond, VA. My diverse client list includes work for Allianz Global Assistance, SnagAJob, Aetna, Waste Management, The Library of Congress, the Centers for Disease Control, Vitrue, NBC, and others.

A recent member of the board of directors for the Interaction Design Association, I actively engage with the UX community through speaking engagements worldwide. I'm a charter member of the Information Architecture Institute, and I helped found Richmond UX (RUX). I also am a guest blogger for ACM's interactions magazine.
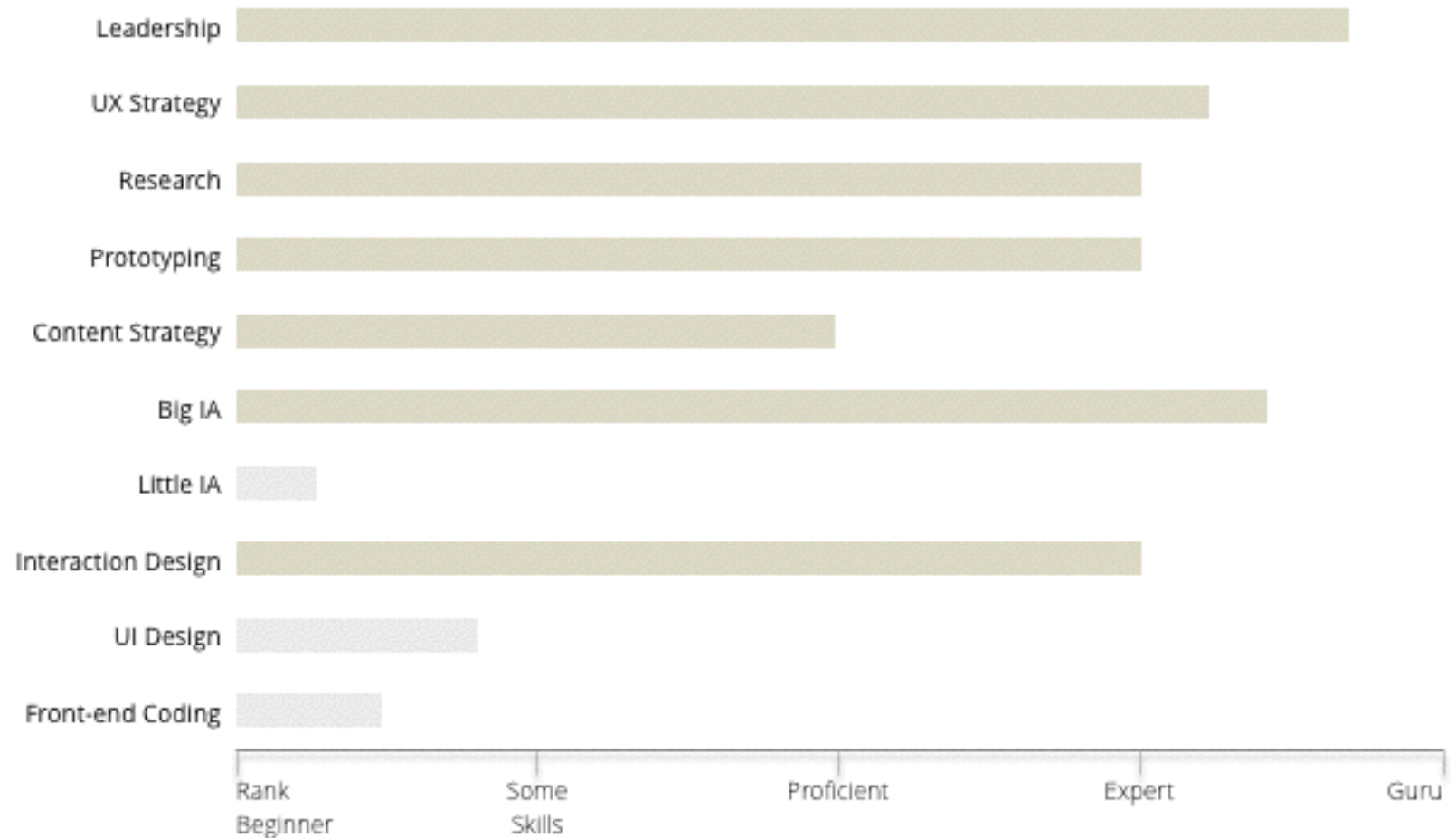
Library of Congress Congressional Research Service 1/2

Creating a self-help area for users reluctant to self-help.

The brief

Established by Congress in 1913, the Congressional Research Service (CRS) provides highly specialized and authoritative research support for members of Congress. A department of the Library of Congress, CRS "works exclusively for the United States Congress, providing policy and legal analysis to committees and Members of both the House and Senate, regardless of party affiliation" (from http://www.loc.gov/crsinfo/). CRS needed our help to enhance the ability for members, their staffs, and other Congressional entities to realize a better search and navigational user experience.

Sketching wireframes. Taking results from research and the design studio, I created quick wireframes with interaction design ideas.
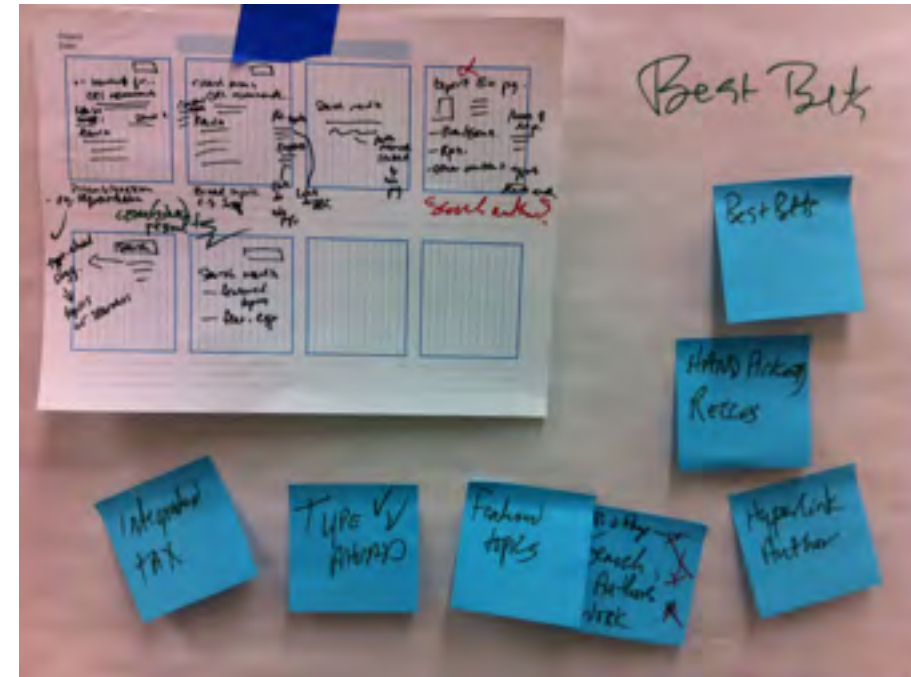
What I did

Partnering with a technology firm, we wanted to help make CRS Products more accessible to its users while ensuring that CRS.gov became more maintainable and flexible.

After reviewing existing quantitative data that CRS had collected, I set up a series of phone calls with staff members on the Hill. These calls formed the basis of an understanding of pain points, frustrations, and difficulties that staff members encountered with the existing experience. At the same time, I interviewed CRS staff members and stakeholders to gauge how they understood their users. Using themes that emerged from this research, I could show stakeholders the gaps in their impression of how users viewed their services.

Creating a self-help area for users reluctant to help themselves.

Design studio helps generate ideas

Once I had a picture of people, their pain points, and their potential requirements, we conducted a design studio with CRS stakeholders. Spending a full day with the assistant director of the CRS and senior staff members meant introducing them to a user-centered approach to product design.

Using the design studio ideas we discussed jointly, the interview feedback, and the CRS survey research, I generated initial design sketches.

More fidelity helps create a prototype. Immediately going into prototyping helped me refine design studio concepts as well as bring clarity to the stakeholders quickly.

Walking the halls of Congress

After achieving buy-in on the design direction, I created a prototype for usability tests. I met with Congressional committee members, staff members, and Senate librarians. These users accomplishing tasks that reflected the type of interaction they needed to do with CRS.gov. Usability testing early in any software project provides indispensable information. Using this information, we were able to provide clear design guidance for our partners. The visual designs reflected the modernity of the tool while also evincing the gravitas that CRS prides itself on.

Key tools and deliverables

- Axure (prototype)
- Silverback (usability testing)
- OmniGraffle (wireframes)
- Design studio

Results

The database developers could understand how to imcorporate user needs into the tools. Stakeholders held high confidence in their users' ability to quickly find information or people they needed.

Biomedical Firm

Led in-person qualitative research and created a roadmap for internal product creation and enhancement.

The brief

This Fortune 100 pharma company wanted to understand how well its internal users experienced IT products and how to improve experiences.

Working with a secondary user researcher, we conducted *in-situ* observations, discussions, and ad hoc usability testing. We also photographed users' environments so we could ensure the UX described took into account their context of use.

- Conducted a workshop with department heads from IT, creating a benchmark of their view of users' UX as well as their goals.

- Interviewed 25 people in three locations.

- After analyzing results and correlating with the stakeholder workshop, we mapped UX along a technology adoption lifecycle, derived recommended approaches, and determined a phased approach for implementation.
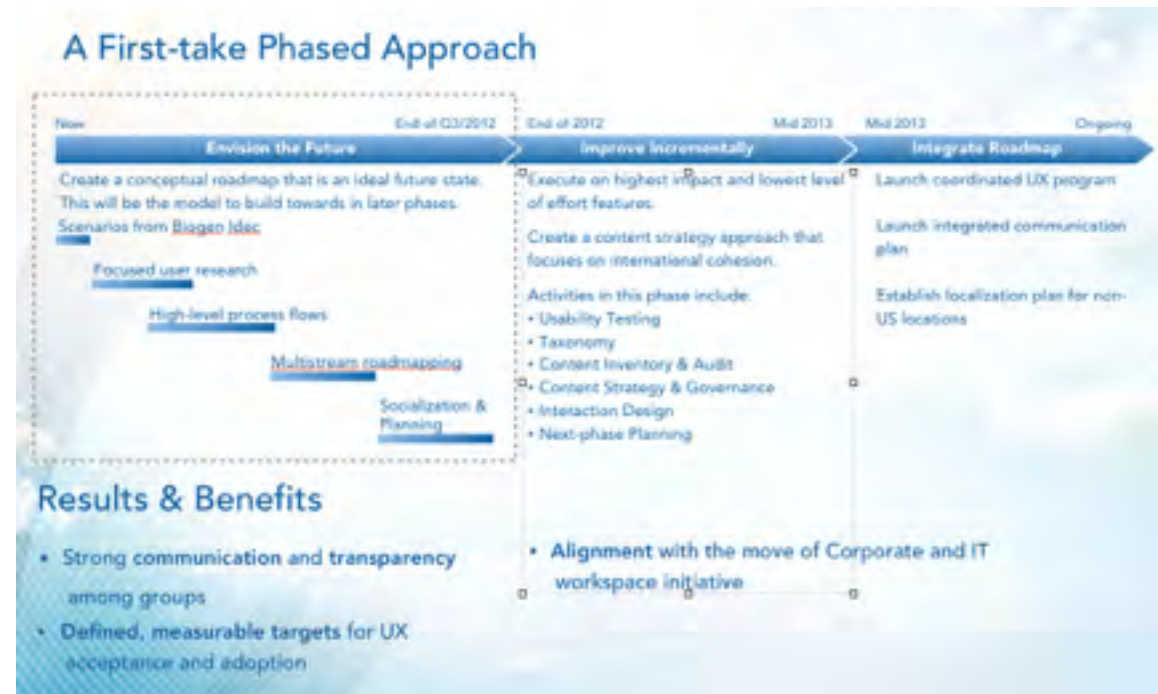
Key tools and deliverables

- Stakeholder workshops
- Contextual observation & interviews
- Keynote
- Project management

Results

Transforming this company that prided itself on its 150+ year experience helped improve product vision, technical direction, and overall buy-in among internal users.
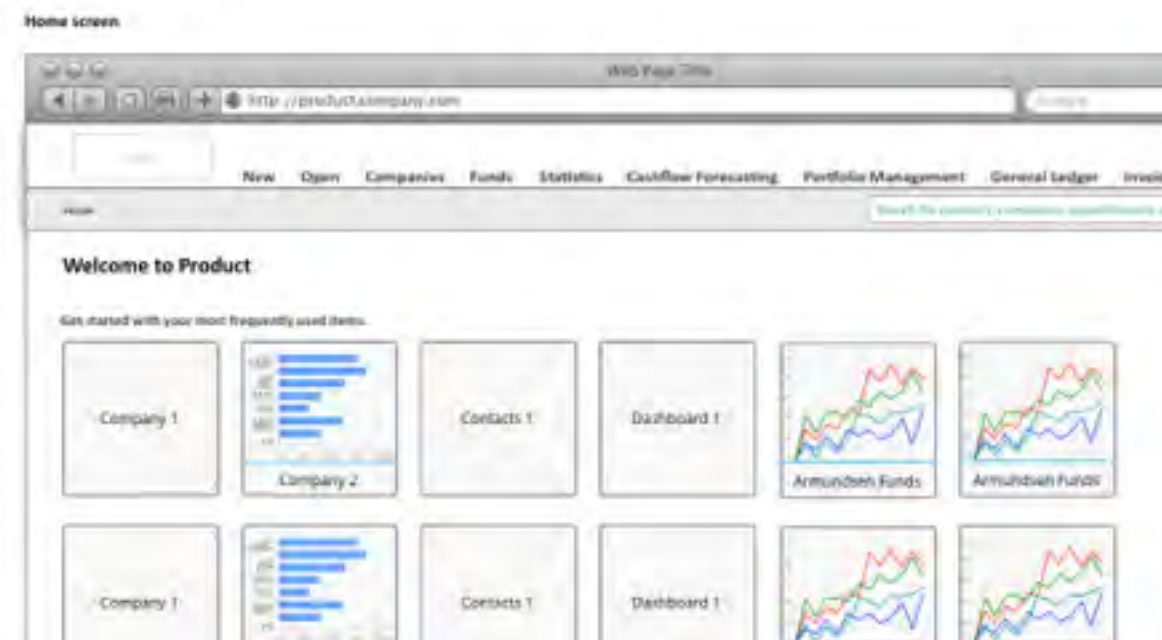

Designing a modern, usable approach to a financial vertical Web app

The brief

An international company that provides complex, highly customized Web-based software for alternative investments needed to radically redesign its application.

What I did

After reviewing existing client research, I interviewed a dozen users, four internationally by telephone or Skype and the others in person. I also conducted a heuristic review of the software, scoring the results both qualitatively and quantitatively. Discovering key areas for improvement, I began with lo-fi wireframes and then assisted in visual designs of what the application *might* look like.

After initial wireframes, the technical team expressed some reservations on the constructability of real-time dashboard panels. Adjusting to ensure capability, I determined that tiles would be most useful on the home page. Users can then scroll vertically in each category. At any time, users can see 15 items to target, with contextual menus for each. In addition, I created a more open and scannable design than the previous software entailed.

Modular Dashboard Collection Because the client's customers can configure the application, the design needed to provide a toolkit that doesn't feel like a toolkit.
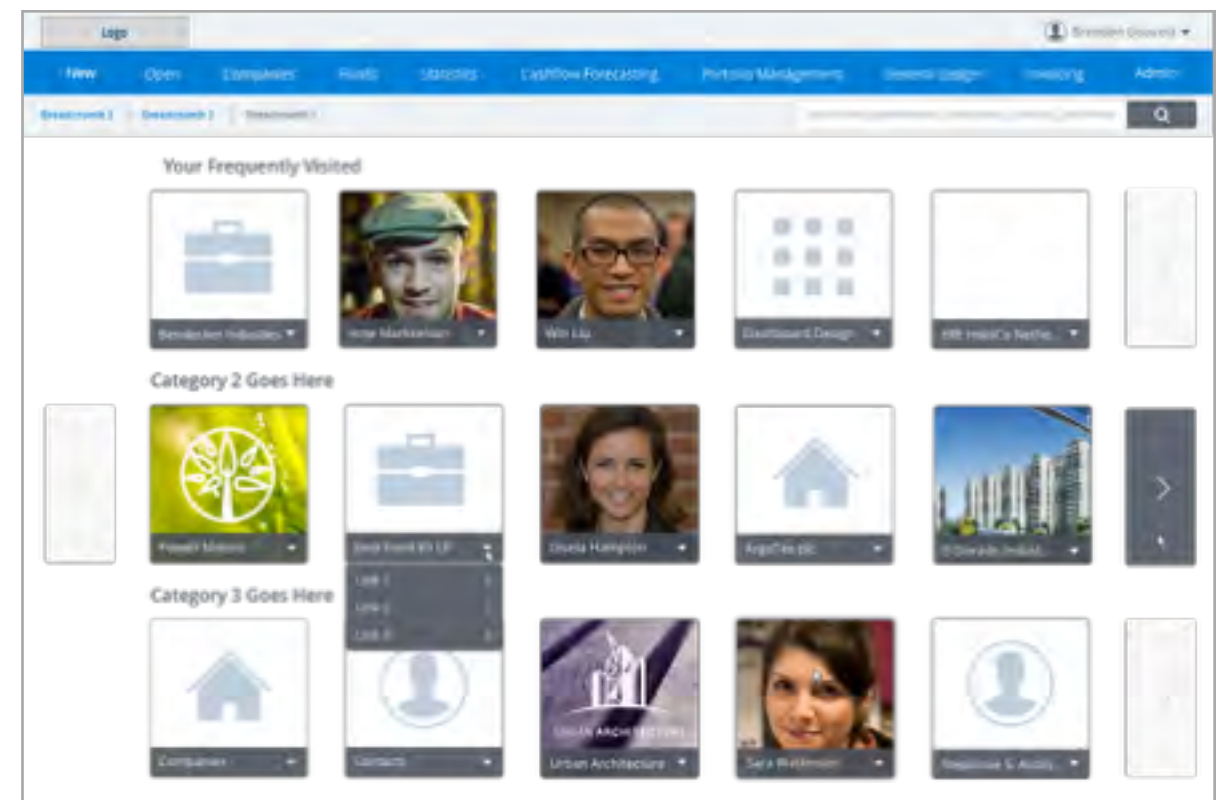
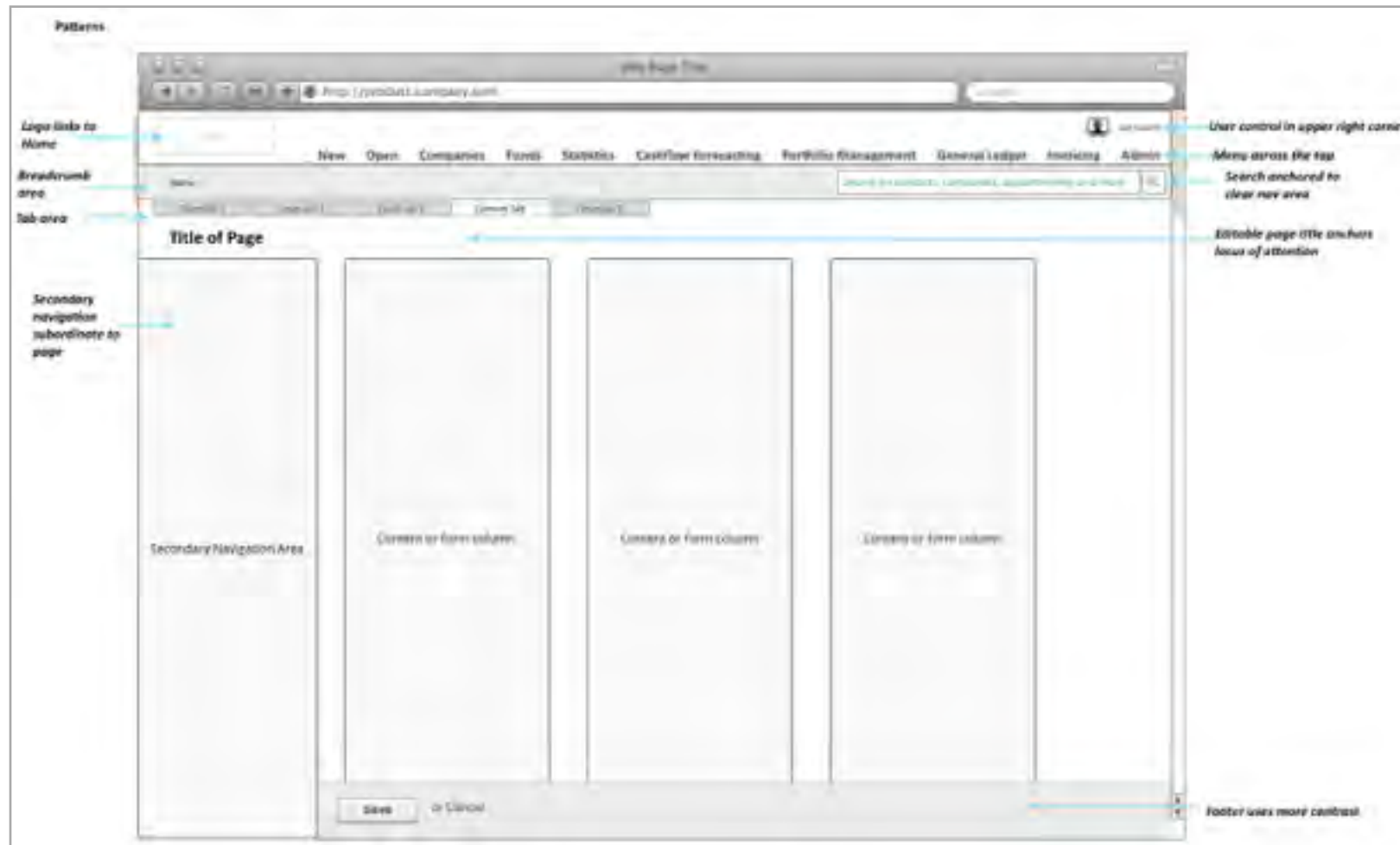**Highly Visual Style** Users can quickly understand where they need to go.

iPad   Desktop app (Java)

Designing a modern, usable approach to a financial vertical Web app

Patterned Approach Because the software is so configurable, it was almost impossible to define exact screens. So illustrating patterns became successful.

Key tools and deliverables

- Contextual inquiry & interviews
- Heuristic review
- Data analysis
- OmniGraffle (wireframes)

- Sketch (visual comps)
- OmniPlan (scheduling)

Results

A prospective client of our client was keenly interested in the UX approach. After engaging with me, they decided to continue with a purchase path, largely based on their confidence in my approach and the deliverables they saw.

Allianz Global Assistance 1/2

Redesign a customer-facing travel insurance transactional and informational site

The brief

Allianz Global Assistance wanted to move its outdated experience design into a modern, flexible, and mobile-friendly approach.

What I did

After conducting several internal knowledge transfer meetings, I established a baseline of business goals as well as the client's perception of their users. I performed a qualitative & quantitative heuristic review. I engaged a subcontractor, who performed moodboarding and helped establish a visual design direction.

Once we had a solid understanding of initial personas, I quickly moved into scenario-based journey mapping. Using a set of provisional personas and these scenarios, I quickly created mobile-first sketches of primary states. I moved these into digital sketches to prove concepts. Secondarily I worked out larger viewport-based ideas, and I established a set of patterns for building the design.

Sketching The activity of putting pen to paper helps me think through design ideas and problems quickly, without getting too precious about them.
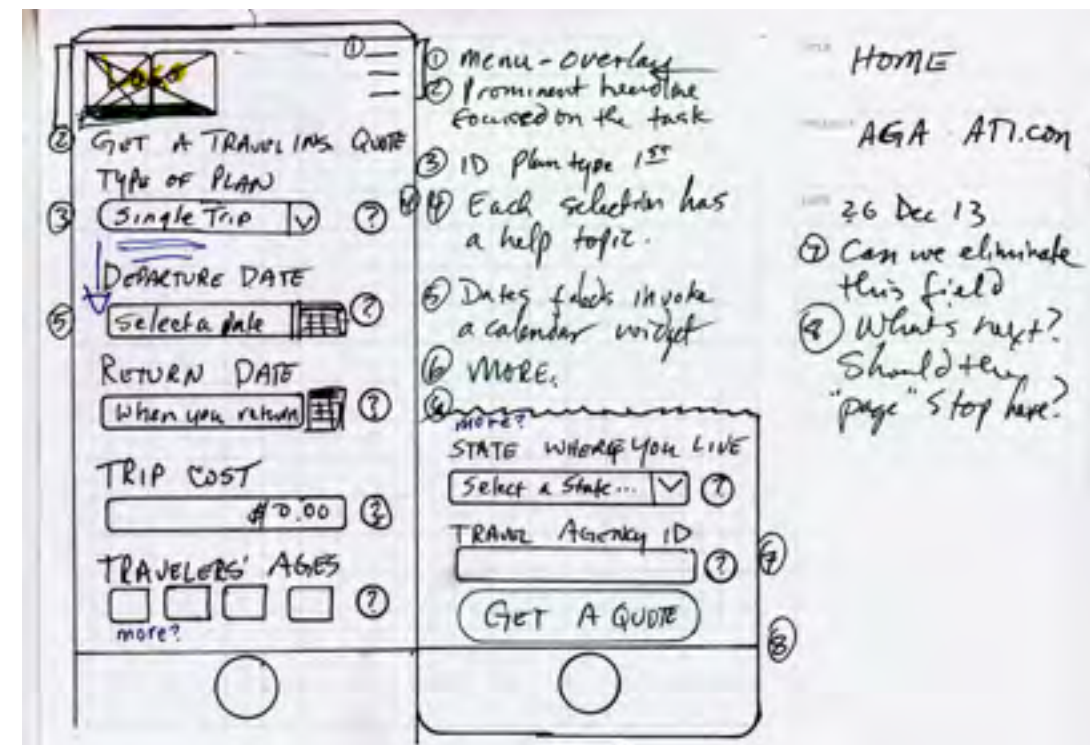
User Research From moodboards to personas to journey maps, I established an internally based understanding of the user. In later activities, I used an Axure-based prototype to conduct in-person usability tests.

Redesign a customer-facing travel insurance transactional and informational site

After working out design concepts internally, I conducted 14 in-person usability tests. Using this data, we were able rapidly to adjust both visual design and interaction design issues. We also proved the viability of some of our concepts.

Once I delivered the project successfully, AGA engaged with me for several more projects:

- European site redesign

- White-label redesign

Using a get-to-prototypes-fast approach reduced time as well as confusion on the part of the stakeholders.

Key tools and deliverables

- Sketches
- Balsamiq (wireframes)
- OmniGraffle (wireframes & journey maps)
- Axure (prototype)

- Silverback (usability testing) Keynote & Excel (heuristic review)
- InDesign (styleguide)
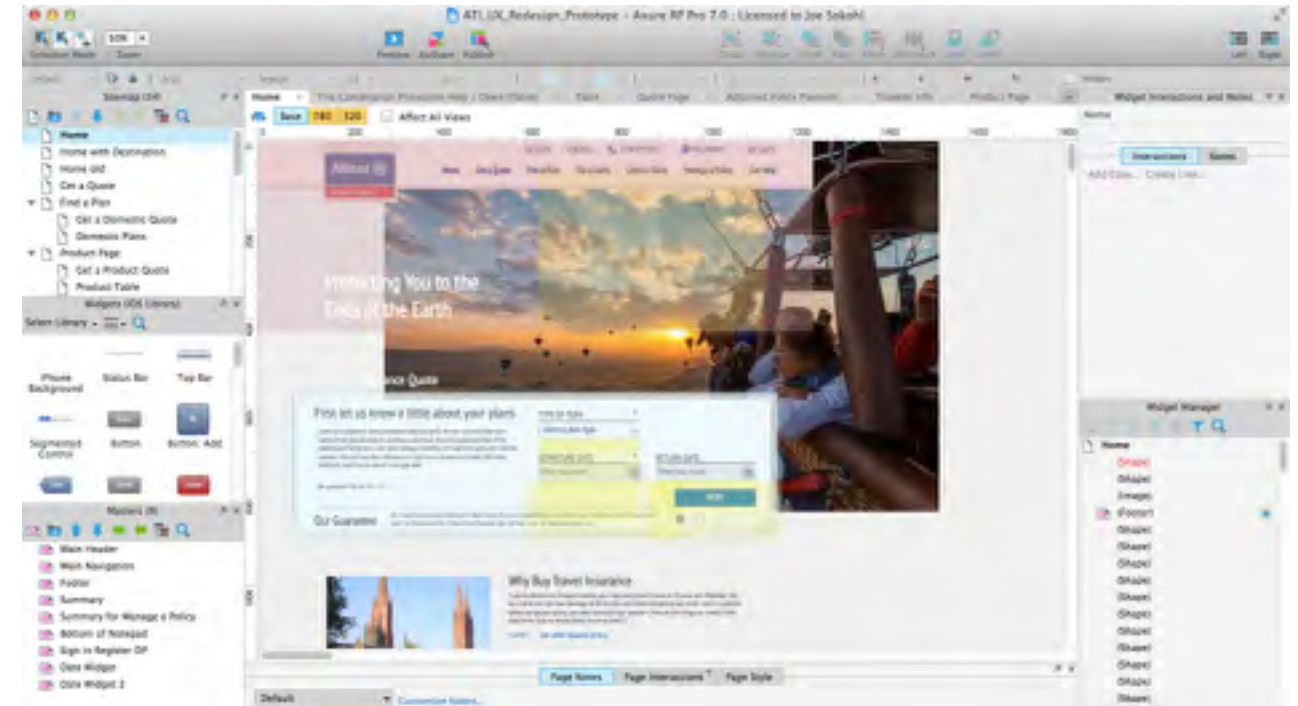
Prototyping Moving to Axure helped not only illustrating interaction design to the team, but it also helped me work out details in the concept. It also formed the basis for both usability testing and documentation, wherein I embedded specs for developers.

Results

The usability tests provided deep insight, helping us adjust some elements of the design. They also validated hypotheses as well. The developers said this set of information was "the best detail and most useful documentation we've ever seen."

Phone Tablet Responsive web

Creating a decision support app across multiple personas in multiple scenarios

The brief

This large company provides deep data to insurance companies, primarily in the property & casualty area (but also some life insurance). The company was standing up a new company-within-a-company, focused on digital tools that helped their clients understand how data had impact on business.

What I did

I worked with a small UX team to understand both internal and external users. A user research provided the primary research, but I led the collaboration to create personas that illustrated core needs, goals, and tasks.
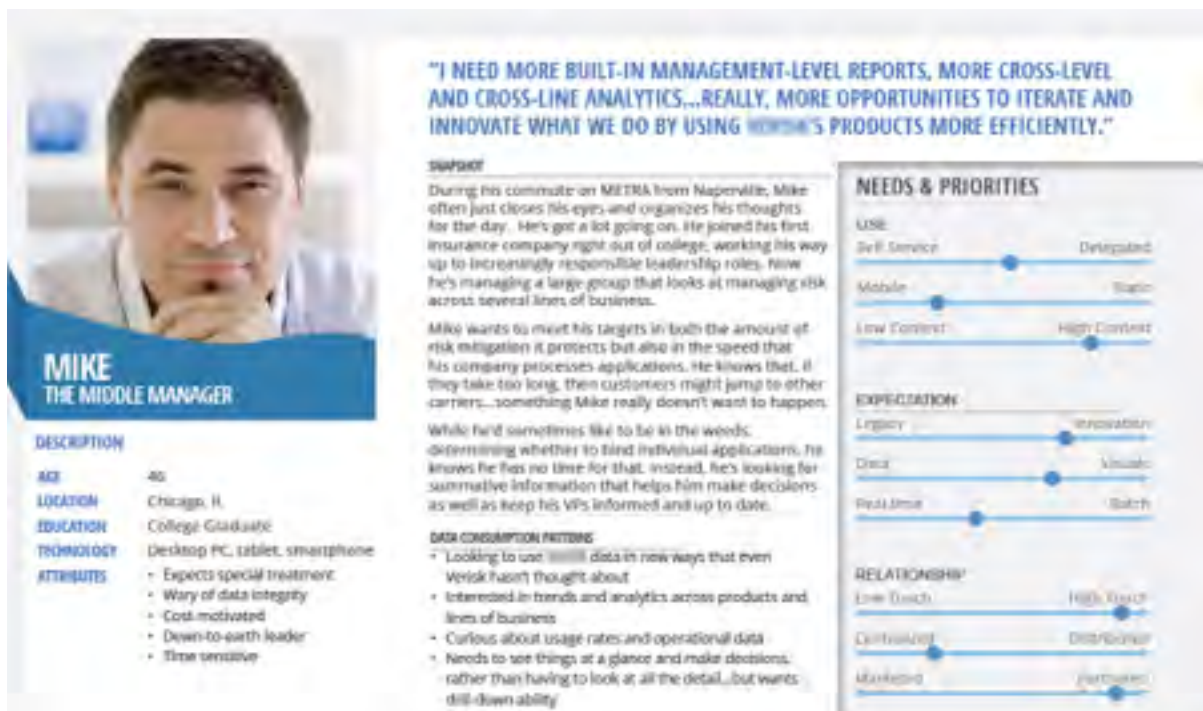
Personas. Our personas and their attendant journeys effectively illustrated a goal-directed approach and helped guide the design throughout the project.

Using my previous experience in data visualization projects, I created a concept of "dashboards of dashboards," as well as a focus on user control. On the home page of the app, My Boards showcase the dashboards that apply to the user. She can add new boards, she can edit a board, she can share a board with a colleague or the client, and she can delete a board (with the right permissions, of course).
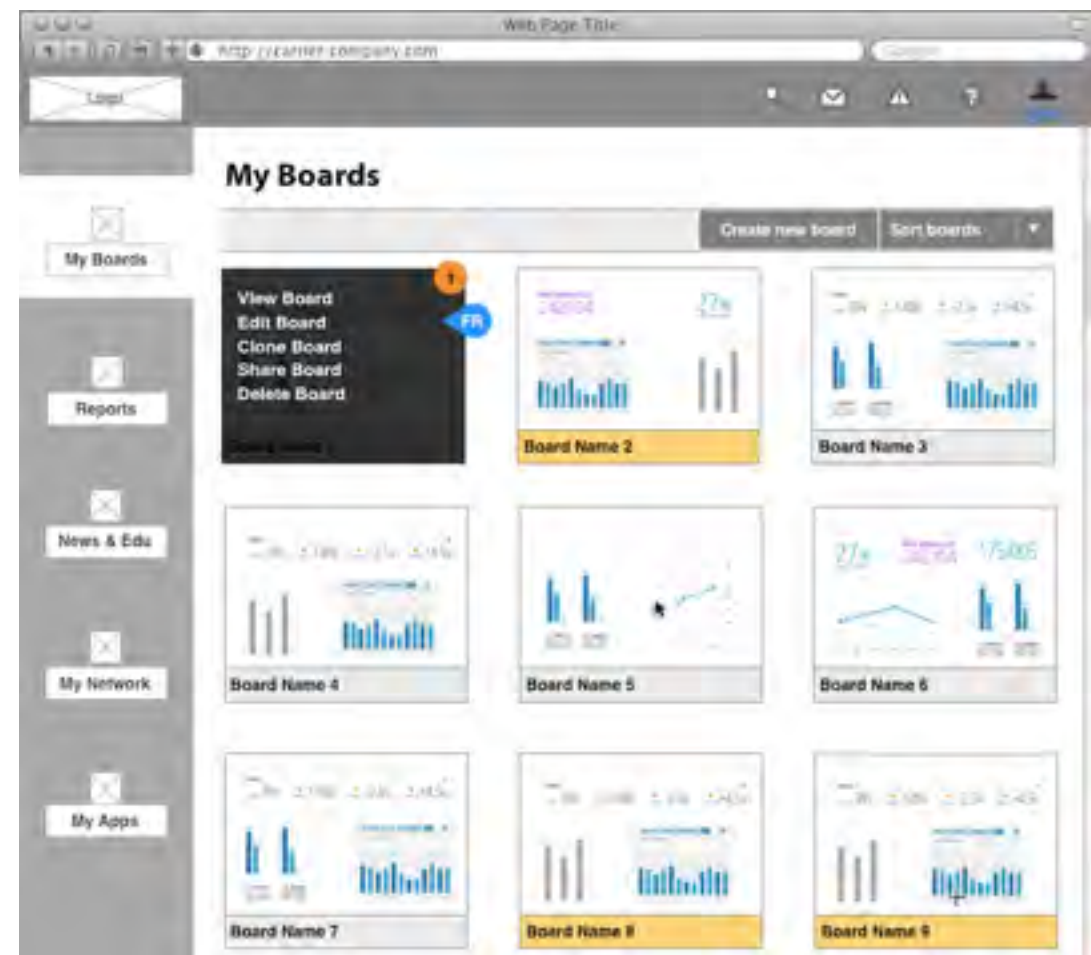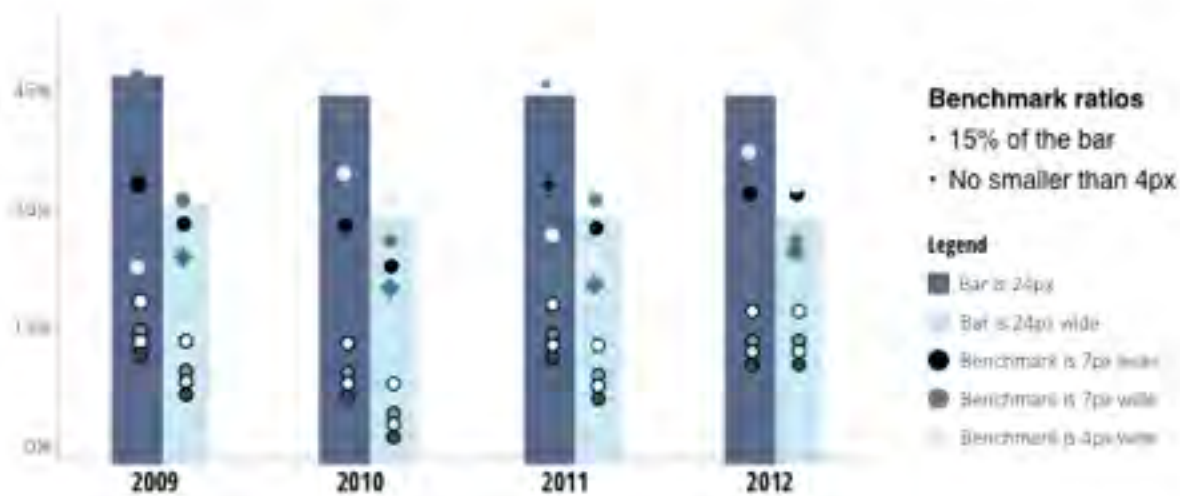
Dashboard of Dashboards. I created the concept that users can adjust dashboards they have available, and they can see at a glance what area needs further research.

Digital Services Company 2/2

Creating a decision support app across multiple personas in multiple scenarios

In addition, I led the effort to refine each area of each dashboard and report. Throughout the process, I ensured that our concept of "humanity in numbers" and the goals of the users remained in the forefront of all team members, whether in New Jersey or Massachusetts or Virginia or India.

Benchmark ratios
- 15% of the bar
- No smaller than 4px

Legend
- Bar is 24px
- Bar is 24px wide
- Benchmark is 7px taller
- Benchmark is 7px wide
- Benchmark is 4px wide

Information Visualization. I worked on several different approaches, ensuring that we could realize quick understanding in small displays.

Sketching. Using whiteboards or paper for quick ideation helped me rapidly illustrate concepts we could then further realize.

Key tools and deliverables

- Stakeholder & user interviews
- Sketching
- OmniGraffle
- InDesign
- Personas
- Journey maps

- Annotated wireframes
- Information visualization
- Dashboard design

Results

Product team members at the client were fully engaged. The VP of the digital spinoff fully appreciated my work, even declaring that she saw me as an integral member of the team. She praised me for times I would tell her "no" to requests that would, in the end, have been detrimental to the product.
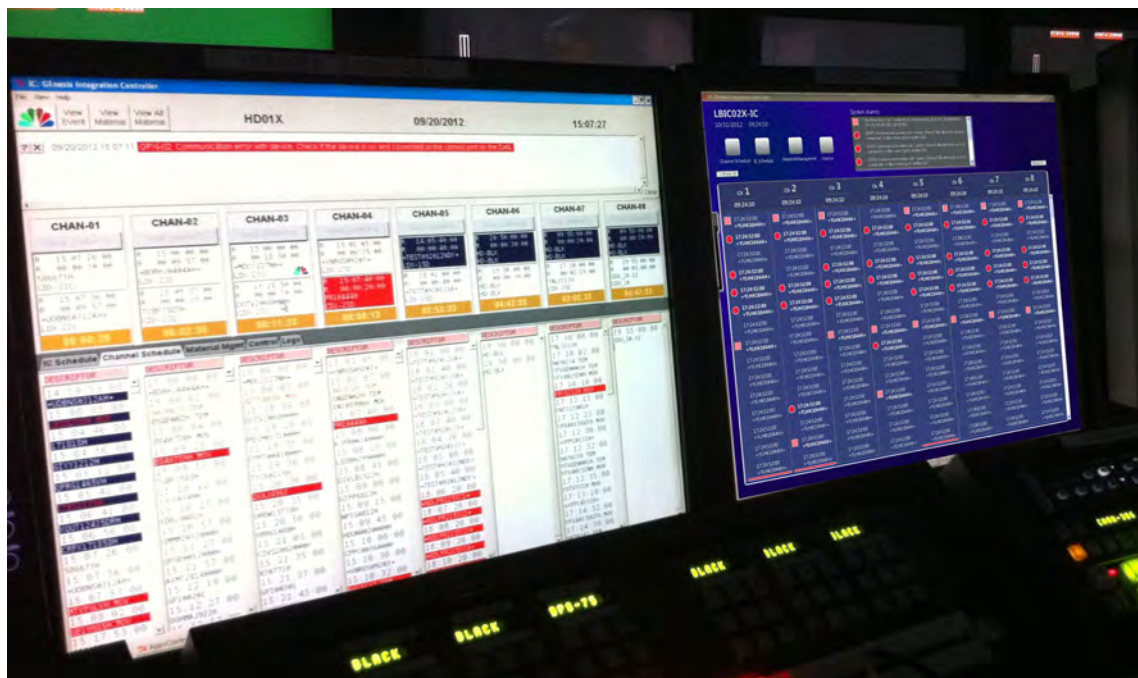
NBC Operations 1/2

Designing a monitoring and alert software for fast-moving, critical tasks

The brief

NBC Operations needed to replatform a mission-critical monitoring application written in C++ and Tcl onto Java. They realized its ancient, blocky user interface needed to be modernized.

What I did

I spent several days in both New Jersey and Manhattan operations centers, observing and interviewing users. I determined human factors elements of visual acuity, motor movements, and other contextual inquiry findings.

I then created a prototype and conducted eight usability tests with actual users in the operations centers. Adjusting the design, I defined exact specifications for the programmers to realize the design.


Contextual Design The original software on the left created pools of light in an otherwise darkened control room. My design on the right showcases both the appropriate palette as well as a more immediate focus on alerts.
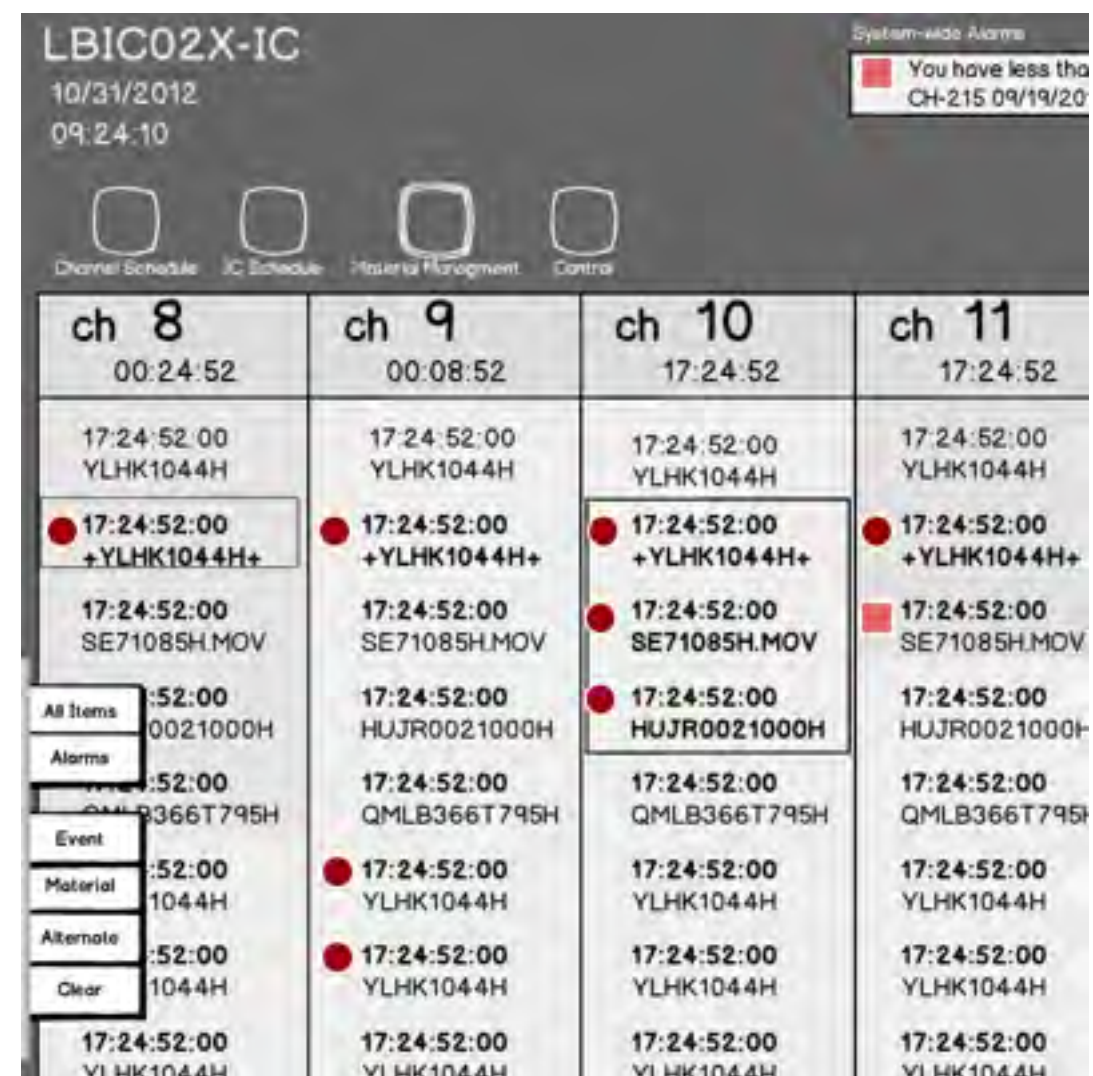
Balsamiq Sketching Using software familiar to the development team, I created concepts in interactive Balsamiq files. These quick sketches enabled me to achieve understanding with the team so that I could build a more faithful prototype for usability testing.
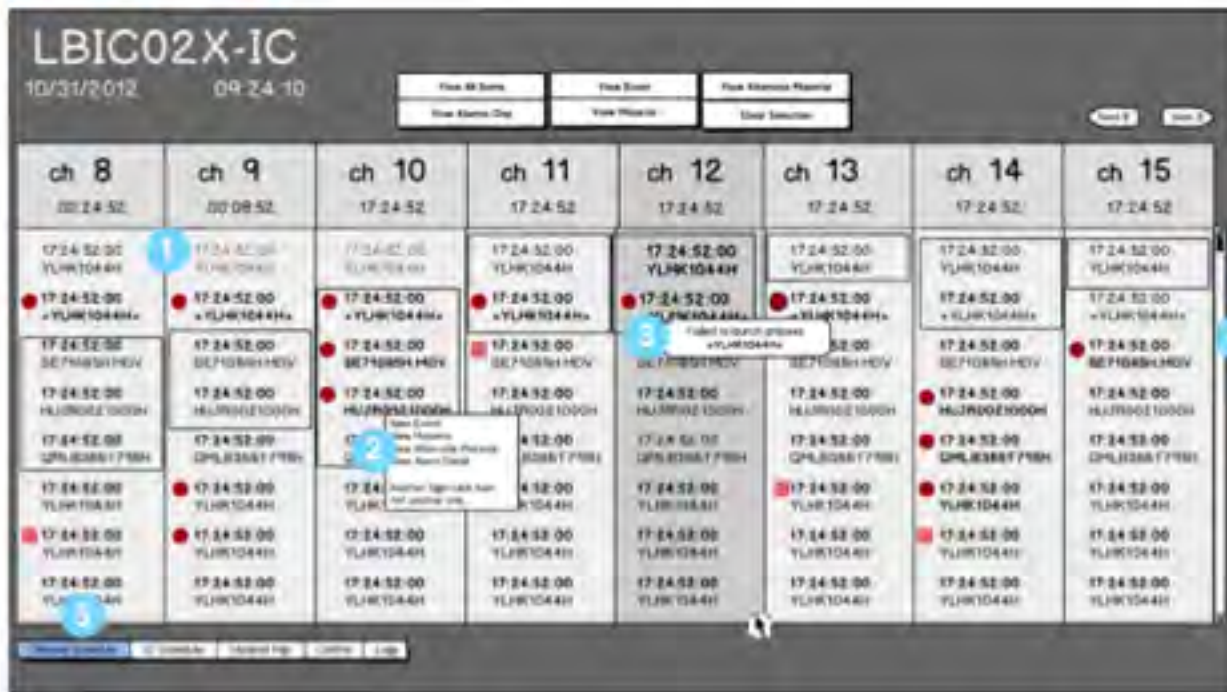
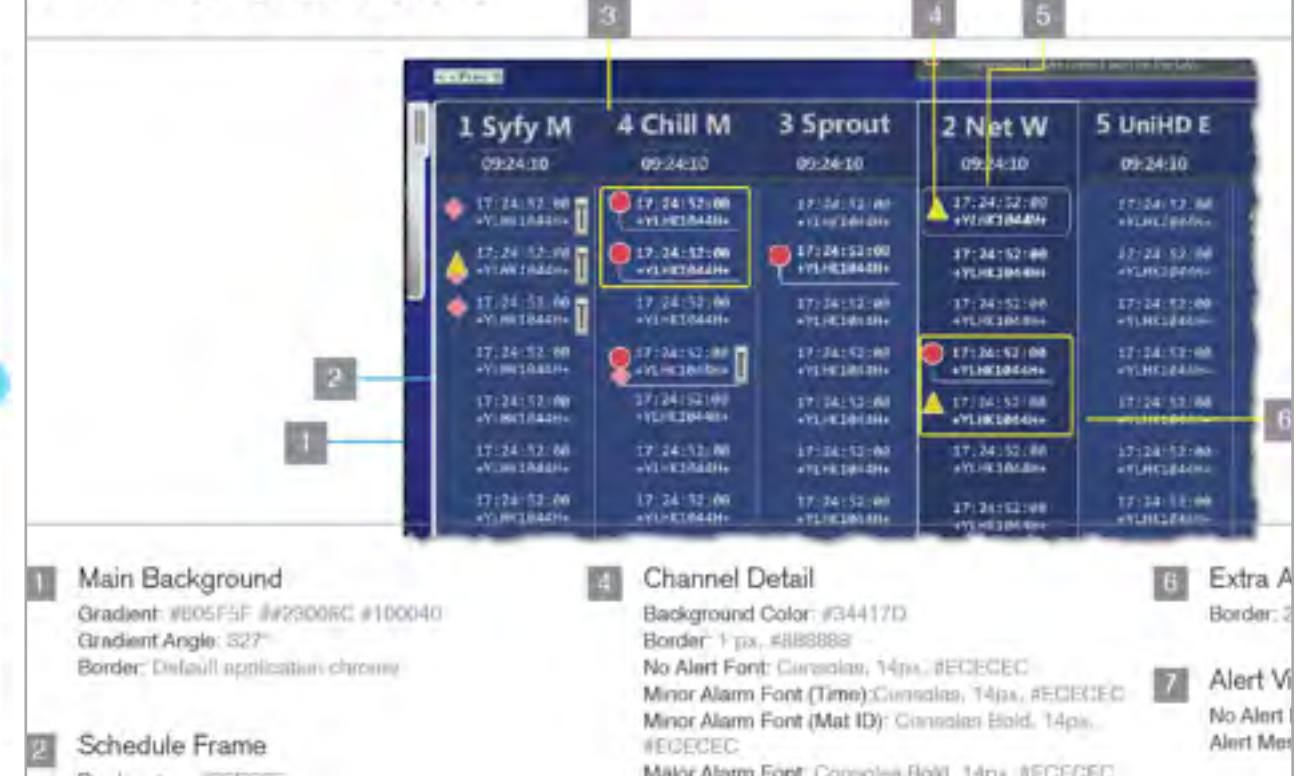Designing a monitoring and alert software for fast-moving, critical tasks

Lo-fi Prototyping. Using Balsamiq, I sketched patterns of light versus dark areas to focus attention. I created a visual hierarchy that supported quick access of alertive conditions.

Detailed Styleguide. While often a detailed styleguide can bog developers down, in this case we decided it was important. The distributed nature of all team members enhanced the need.

Key tools and deliverables

- Balsamiq (wireframes)
- Fireworks (page comps)
- PhotoShop (bitmaps)
- InDesign (styleguide)

- Axure (prototype)
- Silverback (usability testing)

Results

The developers received easily understood and appropriately detailed information so they could rewrite the application. The client was extremely pleased, so much so that they decided to move toward a complete suite redesign based on the user-centered design I provided.
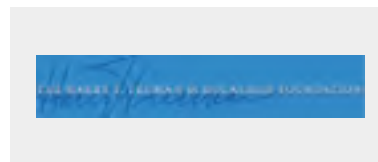
Additional clients

Non-profit/NGO/.gov

IFPRI
Heuristic analysis and improvement recommendations

Robert Wood Johnson Foundation
Heuristic analysis and wireframes for a redesigned home page.

Full agile project for truman.gov, incorporating redesigned IA, interaction design, and UI.

REL APPALACHIA | CNA
Interviewed stakeholders and designed a multilayer data visualization tool.

CDC
Redesign of the CDC podcast library to include heuristic review, personas, and wireframes

Texas Coastal Bend Collection: User research with interviews, card sorts, tree testing, and sitemap design.

VCU
Taught research librarians how to conduct user research and persona lifecycle building for VCU Libraries,
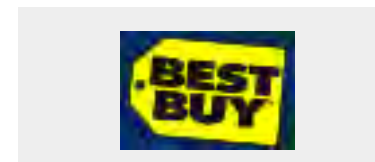
Commercial

WM WASTE MANAGEMENT
Complete redesign of customer-facing site. I worked as a team member in a distributed, rapid design project.

snagajob
Completely new design for an SMB self-service Web app geared toward job providers. Sketching, IxD, prototyping, usability testing.
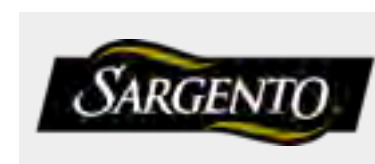
BEST BUY
Wireframing, stakeholder management, detailed specs for the gaming purchase and support experience.
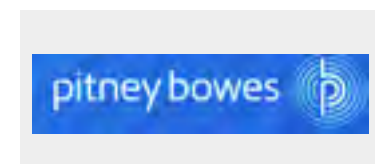
pitney bowes
Strategic UX mapping for complete repositioning of the brand from postal meters to a digital services company.

Intranet

SARGENTO
Contextual interviews, stakeholder management, detailed wireframes.

Biogen
Contextual user research, strategic visioning, and heuristic reviews for IT services and the way users perceive them.