



Hey, I'm Caterina.

Having been born in Barcelona and raised in New York City, I'm a trilingual interaction designer. My curiosity drives me to explore aesthetics, and human behavior.

Currently I am part

of the Extia team in Barcelona as a UX design lead at AXA Insurance. We design fluid and satisfying user experiences for the insurance industry.

I love the work I do, and the people I engage with to brainstorm ideas, and share creative concepts for advancing towards a better future.

Being multicultural has widened my vision, and enhanced my focus for creating innovative solutions.

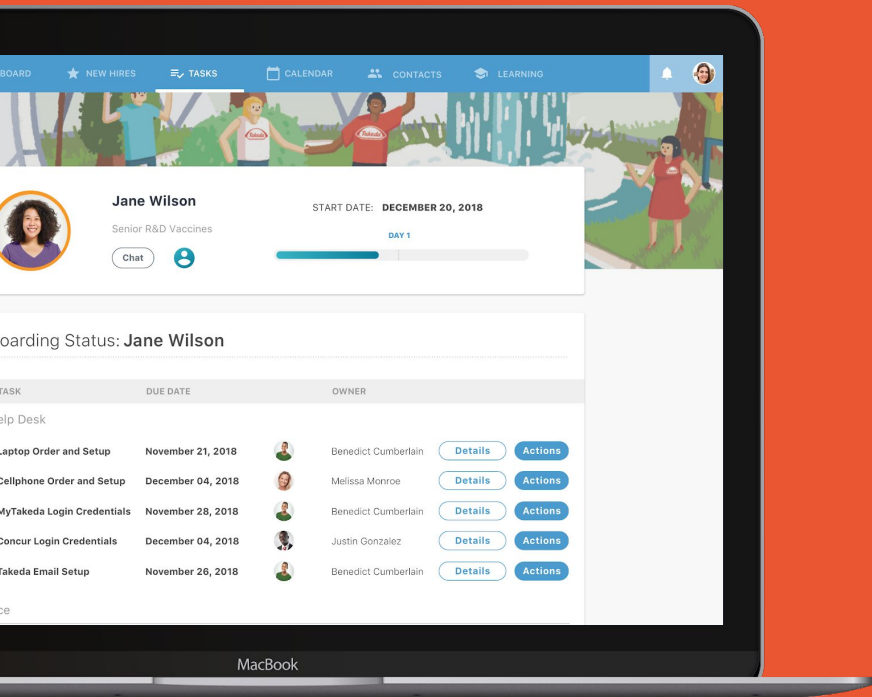
I enjoy every step of the design process, from the research work, to creating prototypes, to user testing, and implementing ideas for all digital interfaces.

My ever-increasing understanding of human psychology and empathy are strengths I feel I possess for solving the needs of users and clients.

Below are some of the clients I've worked for, and the colored circles are those included in my portfolio.







Takeda

HR Onboarding App

Challenge

Takeda, an international pharmaceutical company, came to us requesting that we develop an improved world class preboarding/onboarding online process. The goal was to align, on a global scale, the end to end hiring experience for new employees. While allowing enough flexibility for HR to incorporate their own local practices.

Roles

Qualitative user research, information architecture, UI design, prototypes, and user testing.

TAKEDA ONBOARDING PROCESS ZURICH — CUSTOMER JOURNEY MAP (work in progress)

Customer Journey — Process and Content Matrix

	1. CONTRACT PREPARATION	2. CONTRACT SIGNING	3. FINAL OFFER	4. WORKDAY ID	5. ONBOARDING INITIATED	6. TICKET CLOSED	7. DAY 1	8. DAY 2	9. DAY 3	10. DAY 4	11. DAY 5
PROCESSES											
TOOLS											
COMPETENCES											
ACTORS											
ACTIVITIES											
EMOTIONAL STATES											
ACTIVITIES											
EMOTIONAL STATES											
ACTORS											

Customer Journey Map, after decoding interviews.

1. CONTRACT PREPARATION	2. CONTRACT SIGNING	3. FINAL OFFER	4. WORKDAY ID	5. ONBOARDING INITIATED	6. TICKET CLOSED	7. DAY 1
<p>1. CONTRACT PREPARATION</p> <p>Be the best candidate you can be!</p> <p>Be ready to sign the contract!</p> <p>Be ready to sign the contract!</p>	<p>2. CONTRACT SIGNING</p> <p>Checklist sign the contract.</p> <p>Contract has approved by the boss.</p>	<p>3. FINAL OFFER</p> <p>Offer is accepted!</p> <p>Offer is accepted!</p> <p>Offer is accepted!</p>	<p>4. WORKDAY ID</p> <p>Get the offer to the HR department!</p> <p>Get the offer to the HR department!</p> <p>Get the offer to the HR department!</p>	<p>5. ONBOARDING INITIATED</p> <p>Get the offer to the HR department!</p> <p>Get the offer to the HR department!</p> <p>Get the offer to the HR department!</p>	<p>6. TICKET CLOSED</p> <p>Get the offer to the HR department!</p> <p>Get the offer to the HR department!</p> <p>Get the offer to the HR department!</p>	<p>7. DAY 1</p> <p>Get the offer to the HR department!</p> <p>Get the offer to the HR department!</p> <p>Get the offer to the HR department!</p>

Takeda

HR Onboarding App

Process

My boss and I conducted 58 interviews with new employees, managers, and HR reps, both in person and remotely. After decoding the interviews to identify initial problem areas, I mapped out a customer journey map with pain points, opportunities, and the tools used throughout the hiring process.

My team and I brainstormed ideas, and translated the insights into key app features for solving user's frustrations. The user testing was conducted in Zurich, and with Takeda's Boston and Tokyo offices, remotely. The goal was to identify and gather feedback on cultural differences to redesign the prototypes and retest them to the satisfaction of our clients.

Fill calendar
automatically
with meetings
(manager) team
members etc)

Buddy
System

Clear status
of all open
issues (tickets)
+ actions for
each
(transparency) ↓

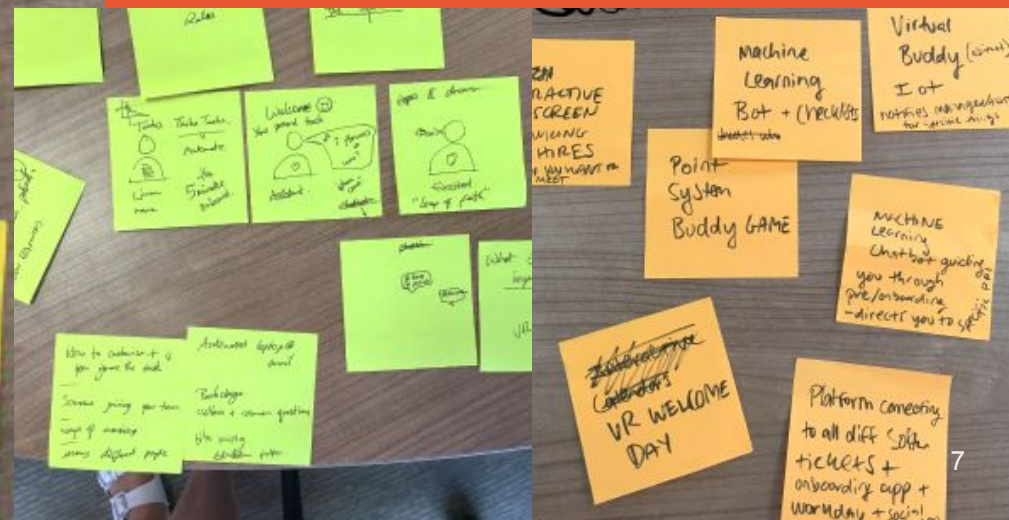
Automatize
request / ticket
creation

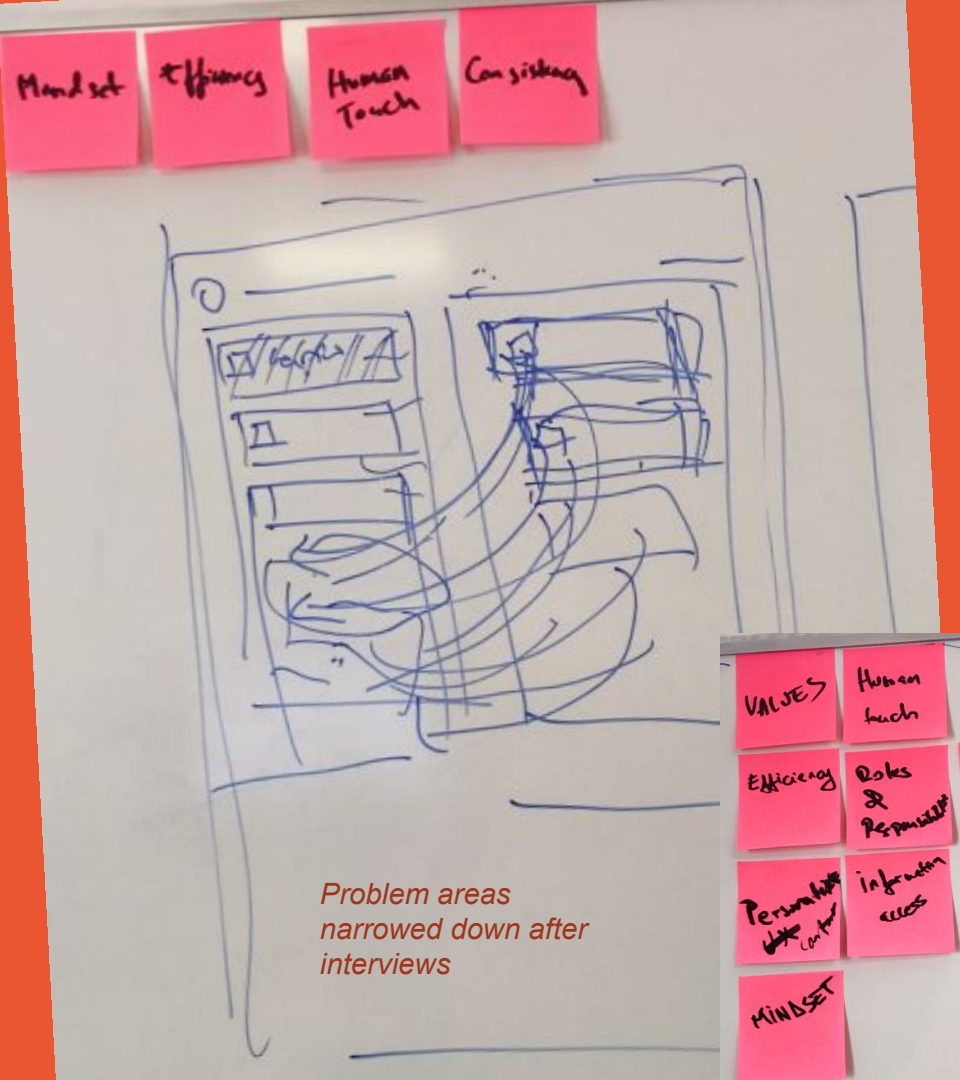
Setup
Clear objectives
and goals
for the new
employee

Full transparency
over the prebo
arding and onboarding
process for the
new hire
(timeline)

Full transparency
over the prebo
arding and onboarding
process for the
new hire
(timeline)

Brainstorming ideas internally with the team





Problem areas
narrowed down after
interviews

Takeda

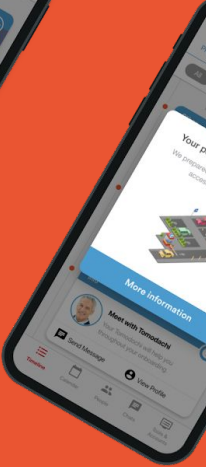
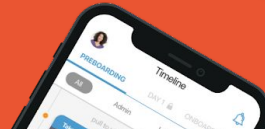
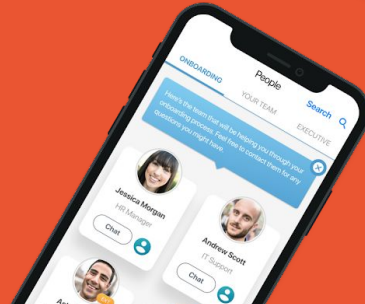
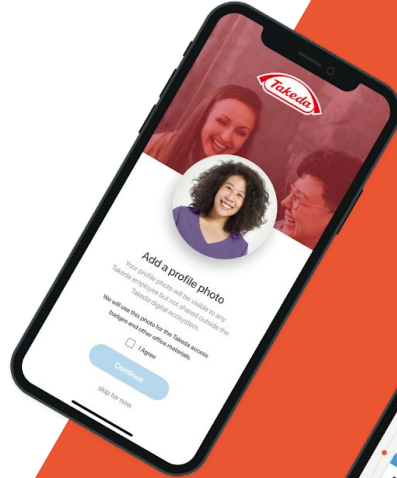
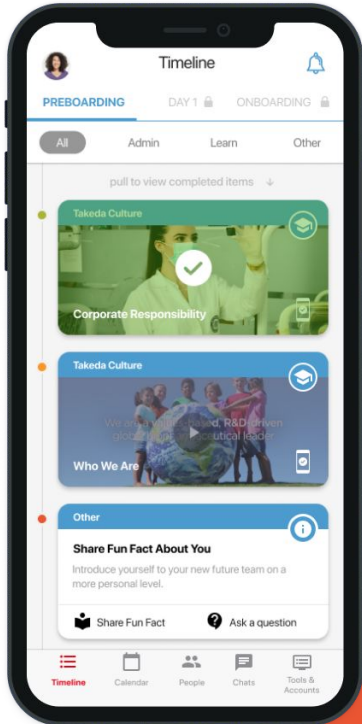
HR Onboarding App

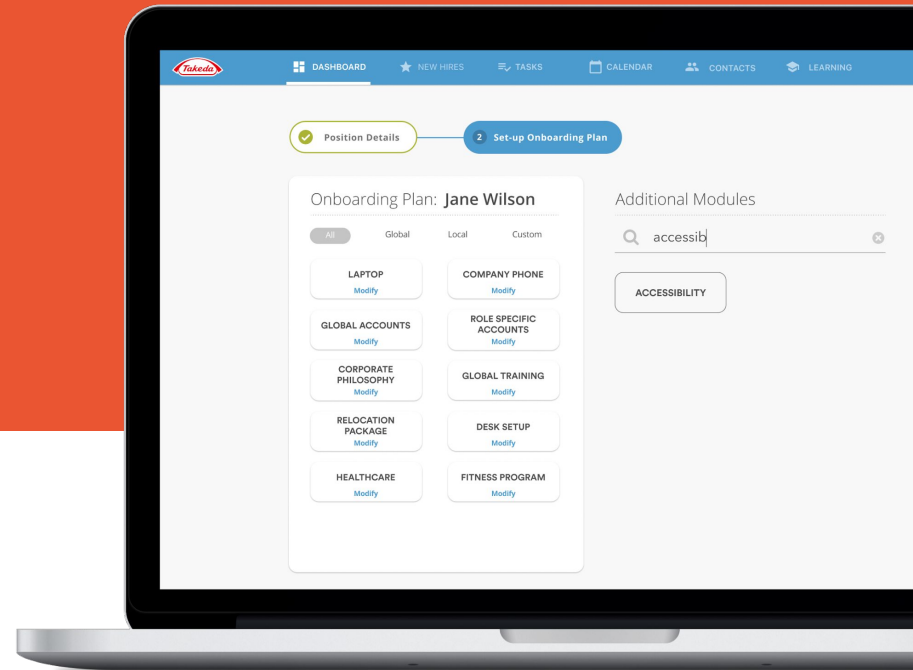
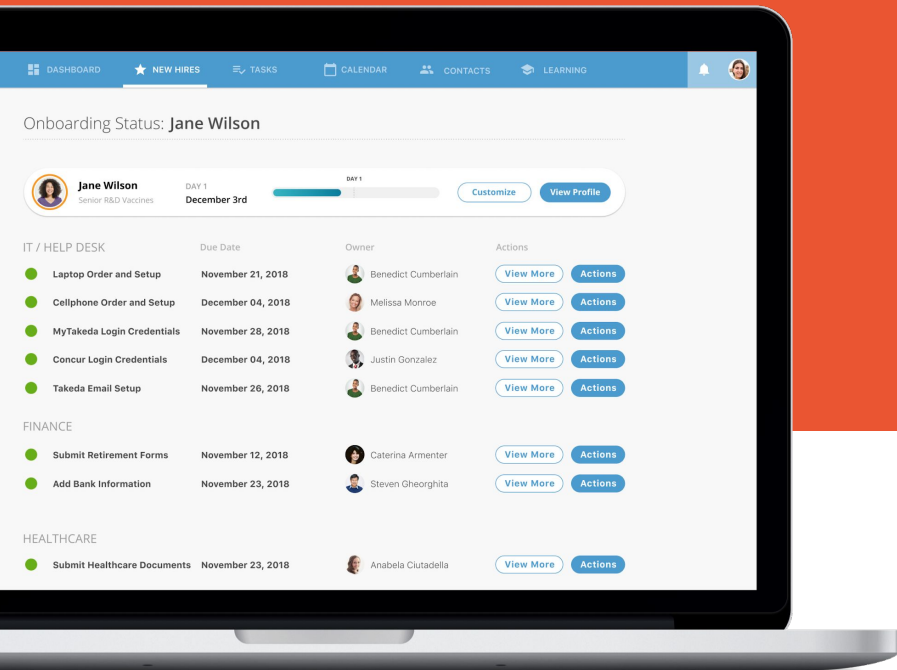
Our Solution

The multi-feature app for new employees was designed to provide the correct information at the appropriate time in their onboarding process. This solution would help new employees track, and prioritize their tasks with a personalized timeline display of their most relevant content.

We also crafted a web interface for HR representatives to use when setting up each new employee's onboarding process. This tool would allow HR reps to personalize the automated content based on key factors, such as: location, job title, marital status, transportation method and more.

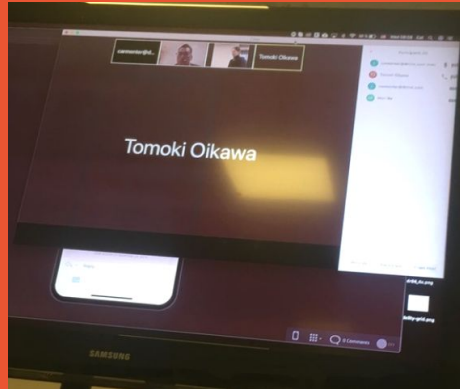
New Joiner App







Presenting our insights at the Takeda Zurich office



Remote interviewing with Tokyo

Takeda

HR Onboarding App

The concept was very well received, which emphasized those unmet needs we had identified within the preboarding/onboarding process in Takeda.

Some comments from employees during user testing:

“I hope it gets up, and launched because this would be very beneficial.”

- New Joiner

“It is important to have a continuous and consistent experience like this.”

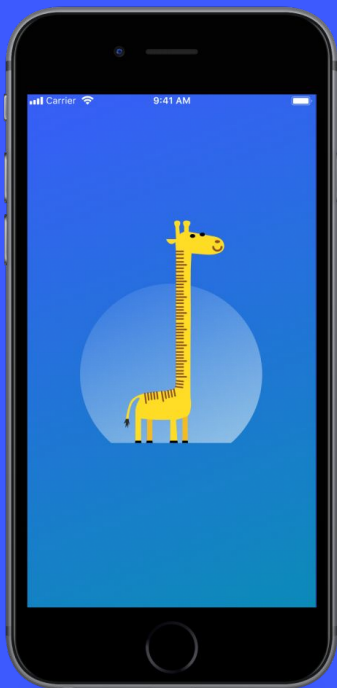
- HR Representative

“This would be a one stop shop that is critical for both sides.”

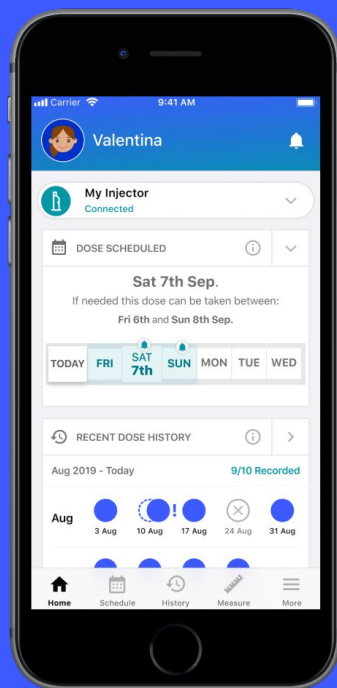
- New Joiner

The logo for Phillips Medisize is centered within a thin white circle. The text is white and set against a solid blue background. The word "Phillips" is in a sans-serif font, with the letter 'i' having a dot. Below it, "Medisize" is in a larger, bold, sans-serif font. Underneath "Medisize" is the text "a molex company" in a smaller, lowercase sans-serif font, where "molex" is bolded.

Phillips
Medisize
a **molex** company



A splash screen I illustrated to represent growth for children.



The home screen displays the injection dates and the status of the connected injector.

Phillips Medisize - Monter

Growth Hormone App

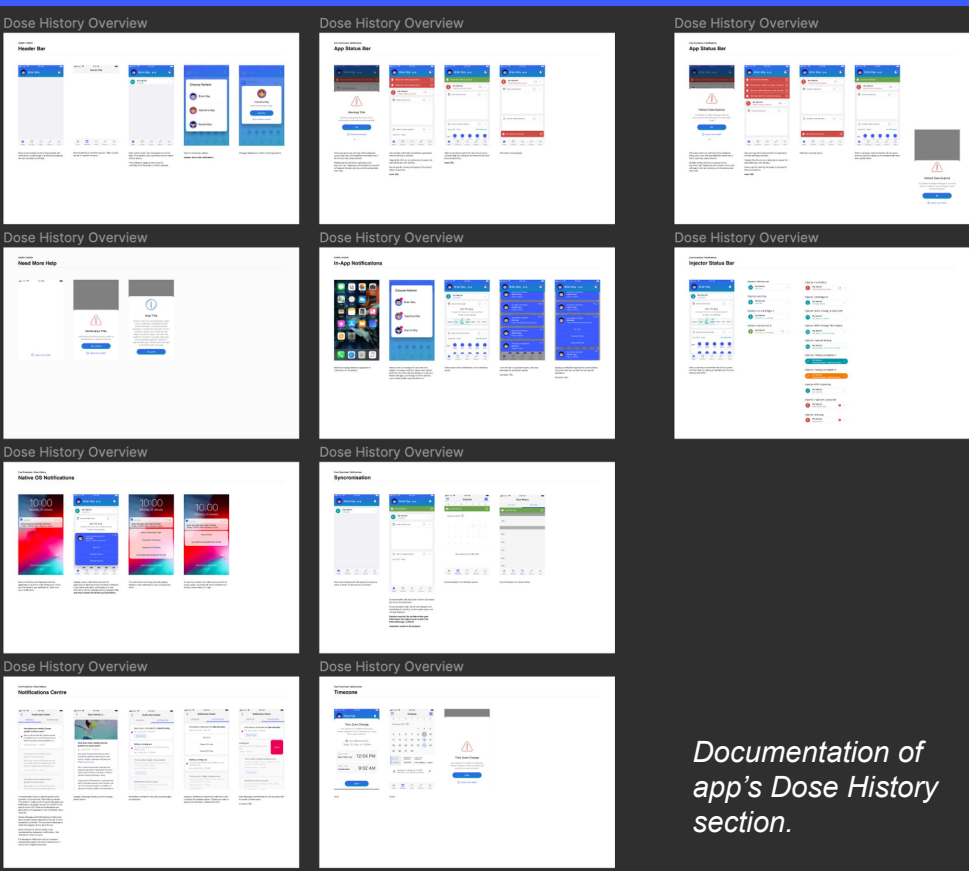
Challenge

Phillips-Medisize is a leading biotech company that provides drug delivery devices to the pharmaceutical industry, and were looking for a way to leverage their devices connectivity via bluetooth. Their main objective was to improve the patient/user experience and to create a direct feedback loop between patient, healthcare practitioners, and case managers.

The Monter mobile application was specifically for patients undergoing human growth hormone (hGH) injections, and their caregiver's involvement.

Roles

User research, information architecture, user flows, customer journey maps, prototypes, UI design, design QA and dev support.



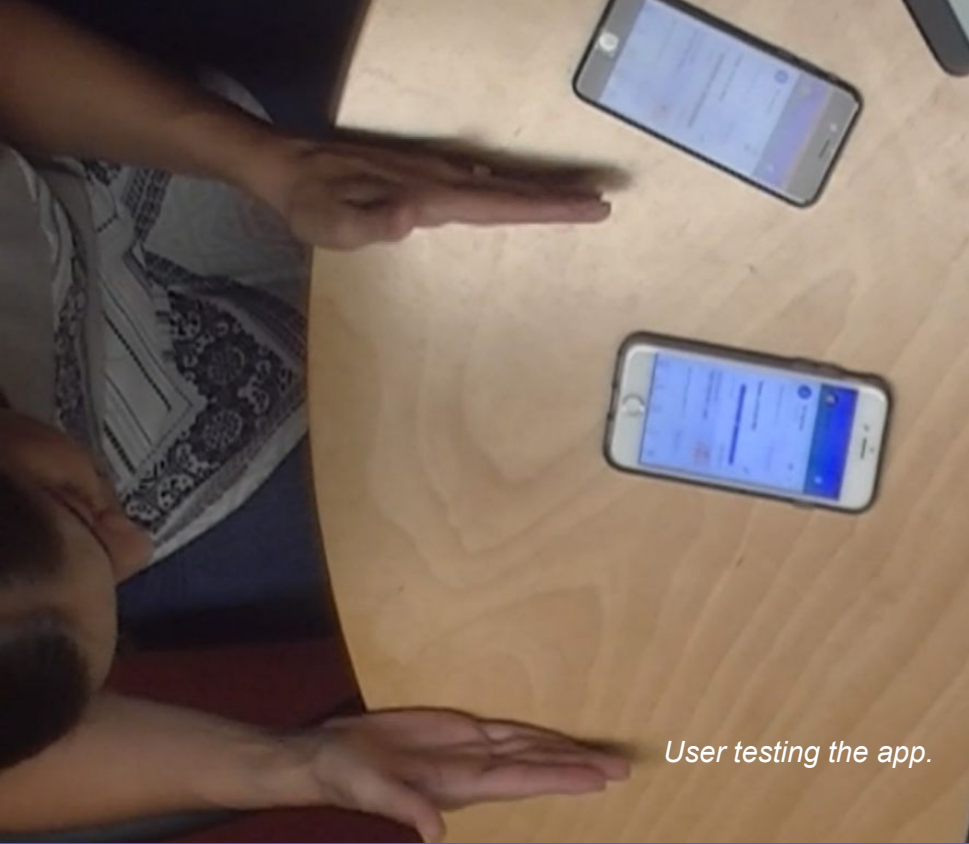
Documentation of app's Dose History section.

Phillips Medisize - Monter Growth Hormone App

Process

The design lead and I were responsible for the UX and UI designs of a patient app, and web portal for medical professionals.

For the prototyping and testing phases, my design partner and I worked alongside the director of Phillips Medisize Connected Health who conducted several focus groups for us to analyze the feedback and reiterate the designs, determined on creating an easy to use, and intuitive app for all ages that would be a vital tool for all patient's health care.



User testing the app.

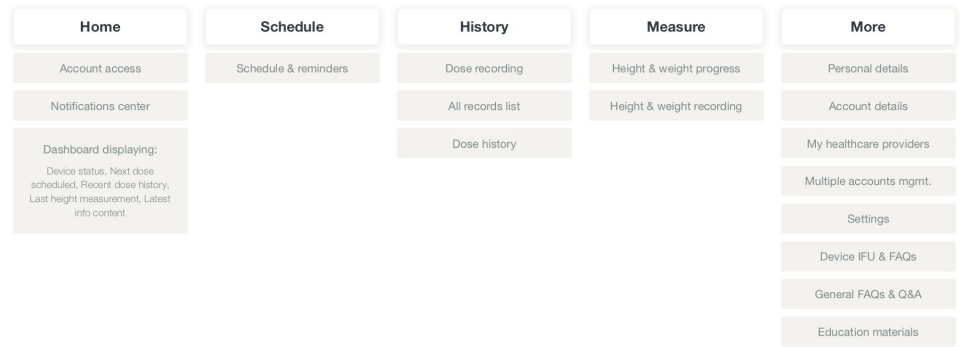
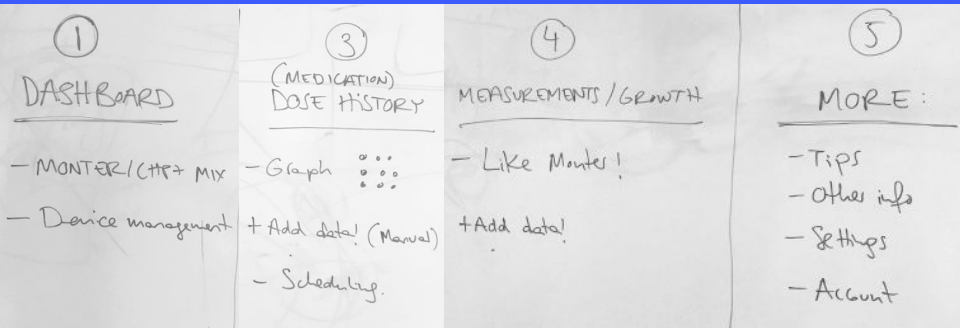
Phillips Medisize - Monter

Growth Hormone App

Process

My responsibilities included: UX benchmarking, analyzing and decoding user's feedback, updating prototypes based on client or user needs, supporting developers, and documenting design guidelines.

I also conducted all-day workshops and presented the works-in progress of design proposals to the clients who visited our Barcelona office. This close collaboration with the clients allowed us to complete our work to their satisfaction.



Phillips Medisize - Monter

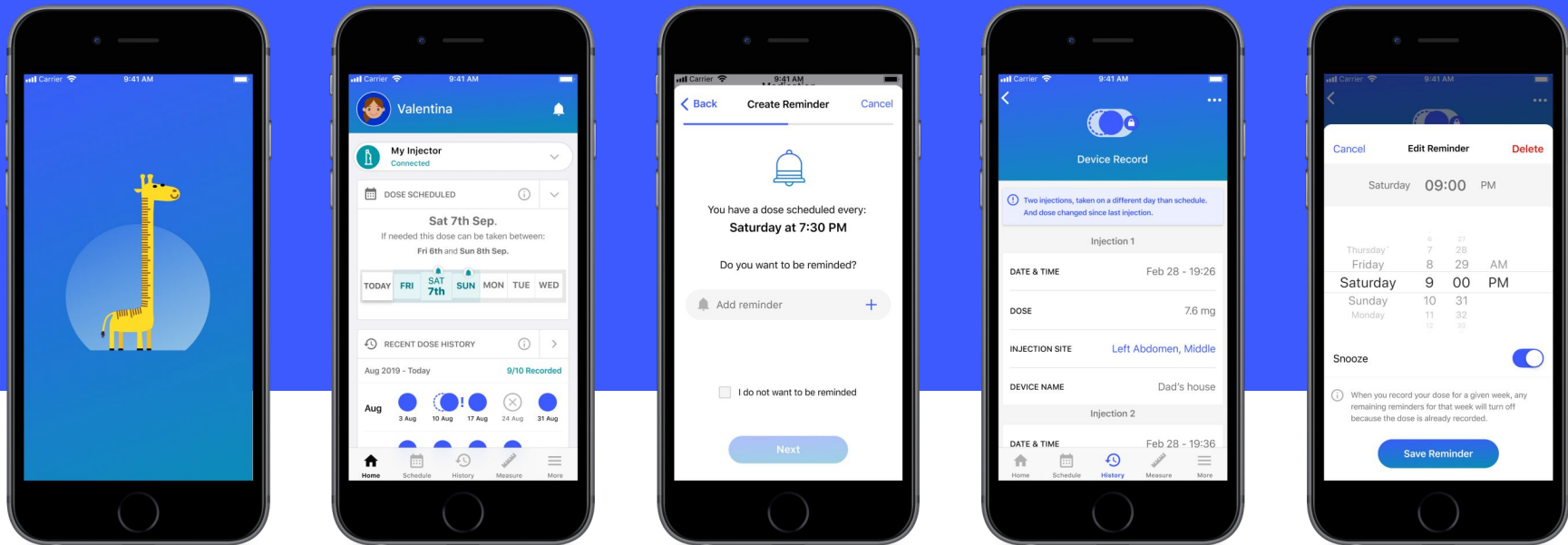
Growth Hormone App

Our Solution

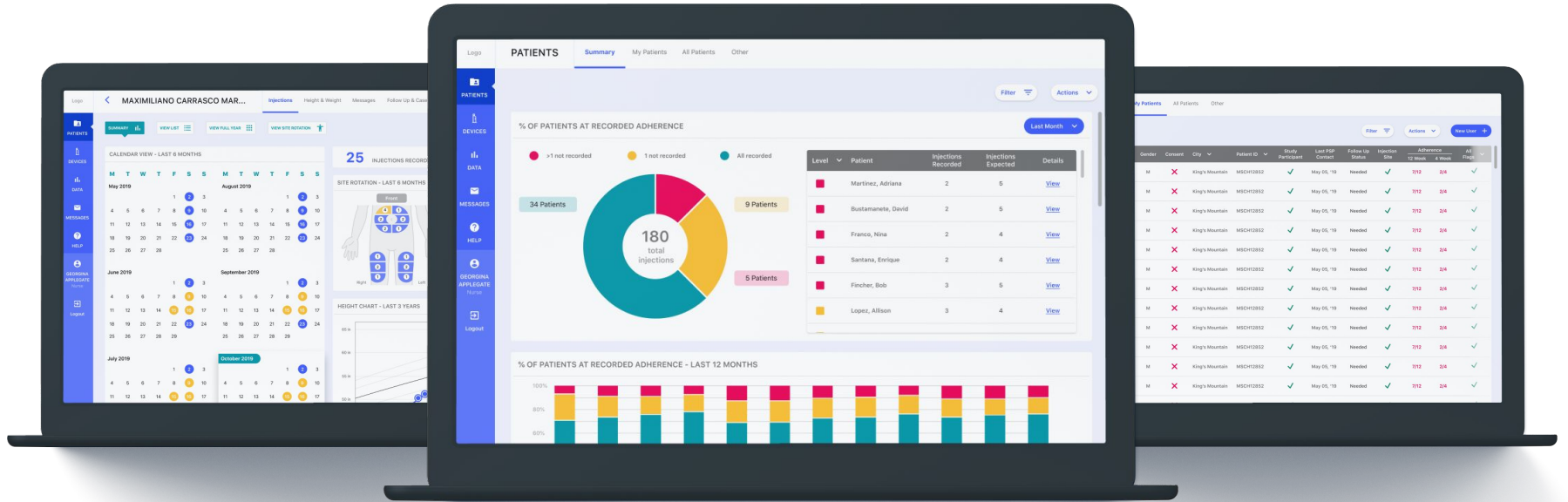
The app enabled users to set a medication schedule with reminders, record the dosage taken from the connected device, track injection history, and monitor growth measurements.

The Monter mobile app functions in conjunction with a smart autoinjector to support medication management. Doctors can meanwhile use the web platform to track their patient's health progress, and send them private messages or reminders.

The Monter app architecture consists of 5 main sections allowing the user to reach all the functionalities available.



App for patients and caregivers.



Web portal for doctors and health professionals.

Art | Basel



New York Times article.

Online Viewing Rooms

Art Basel

Challenge

Art Basel is an international modern art fair that physically brings together artworks and art collectors. I had been assigned as their sole UX/UI designer a few months prior when covid appeared. When Art Basel's exhibition events were cancelled, their digital platform had to urgently be reimagined and revamped with enhanced features.

Expectations grew to enhance their digital presence, and though a challenging process it was also illuminating for me while designing new UX features in a shorter time than usual. I juggled between near-future designs, current designs, and quality assurance, in constant collaboration with the engineers who were building them.

How might we...



Online Viewing Rooms

Art Basel

Role

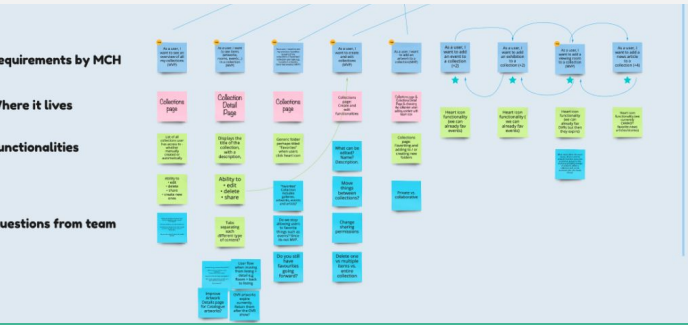
UX benchmarking, UI design for a responsive web and app, information architecture, design QA, and graphic designs for iTunes and Google stores.

Requirements by MCH

Where it lives

Functionalities

Questions from team



Search Query



Art Basel - Official App

Lifestyle

MCH Messe Schweiz (Basel) AG



Not Enough Ratings

GET



12+

Age

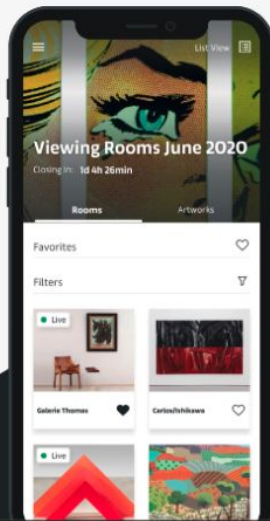
Art|Basel

Art Basel - Official App is only available on iOS.

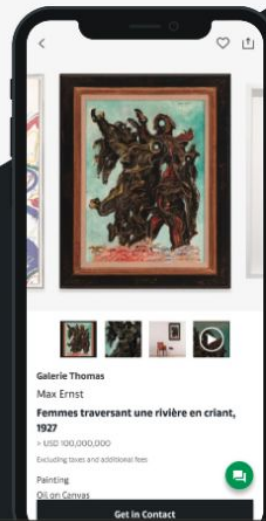
Art|Basel



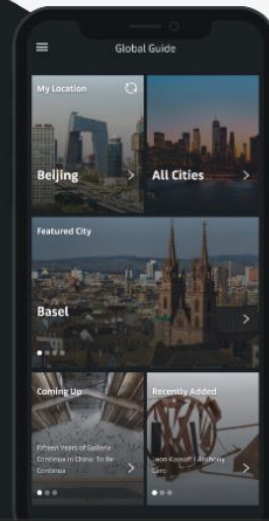
Browse Online Viewing Rooms

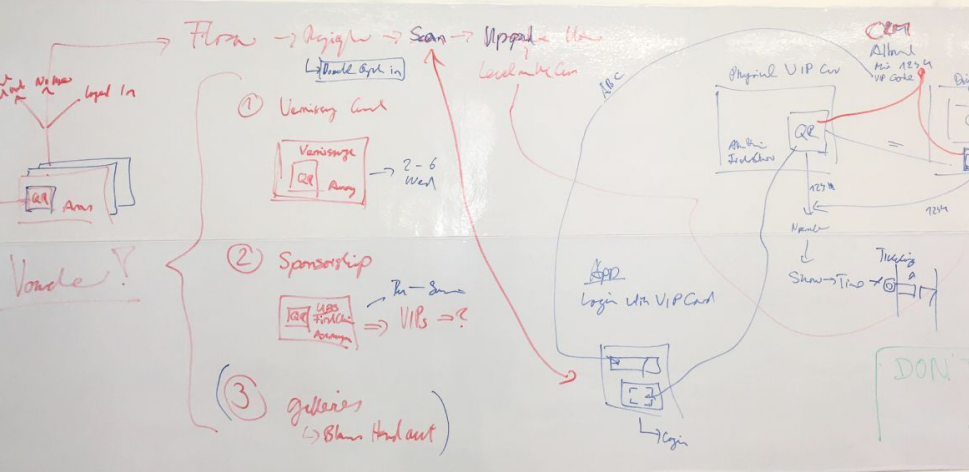


Discover Artworks



Explore Cities



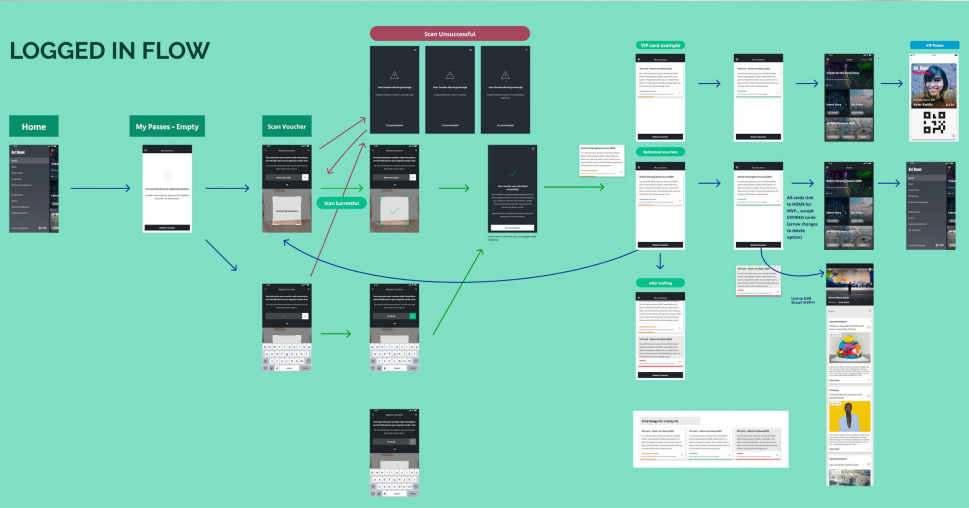


Online Viewing Rooms

Art Basel

Process

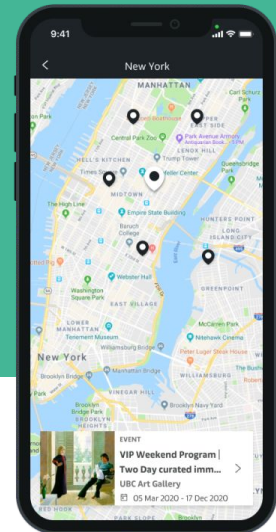
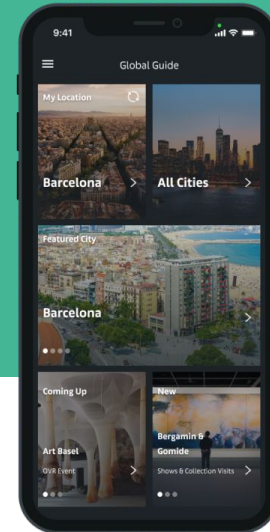
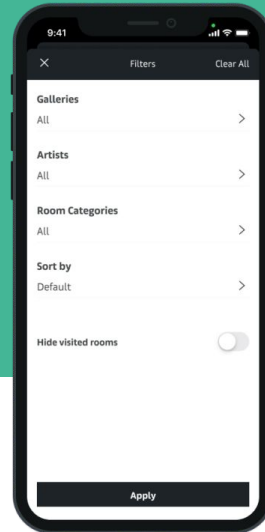
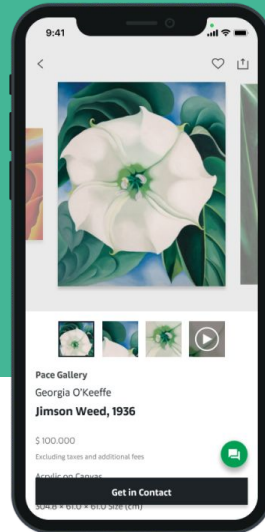
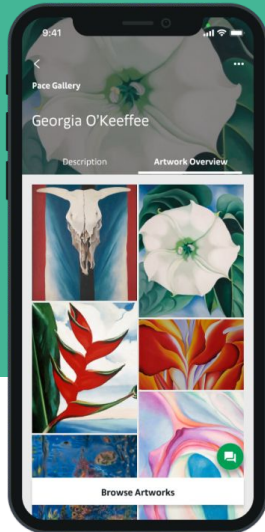
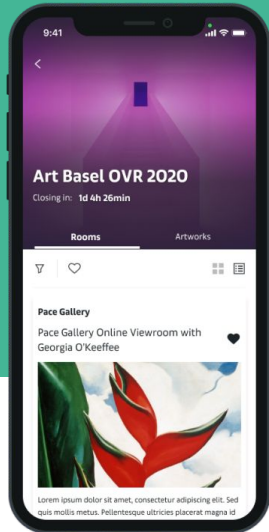
I worked as the sole UX designer along with a team of 12 engineers and 1 PO using the agile method of 3 week sprints for 1 year. After I familiarized myself with all of Art Basel's diverse online platforms, I was able to research, create, and present new concepts and wireframes to the client. I also redesigned their entire login flow, online viewing rooms, a new voucher redeeming feature, and made vast improvements throughout all of Art Basel's digital platforms. While I continuously imagined and visualized future designs, I was able to verify that the developers carried out the designs. And was always available to support them in any way possible.



User flows for the new Voucher Redeeming feature for Mobile.

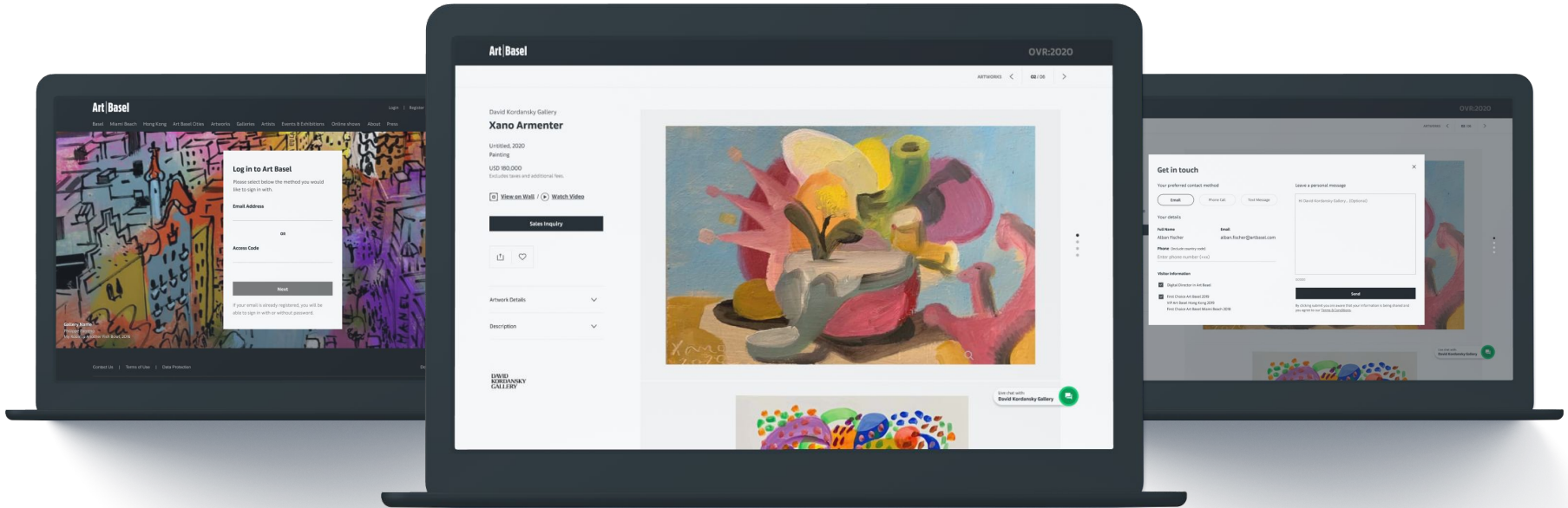
Online Viewing Rooms

Art Basel



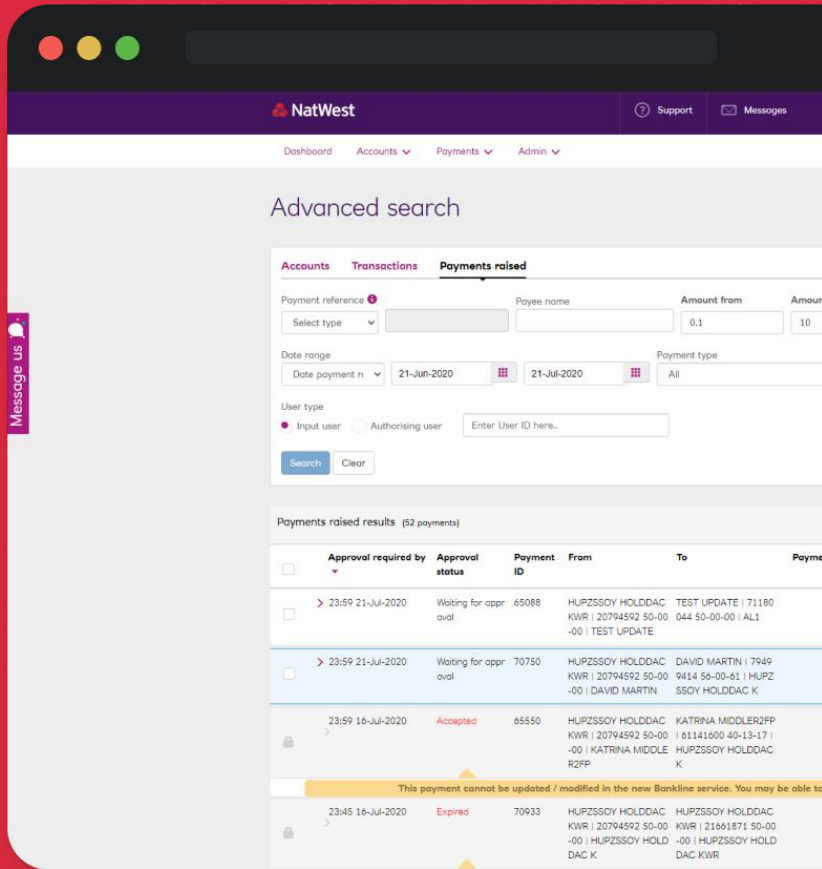
Online Viewing Rooms

Art Basel





NatWest



Initial NatWest Bankline platform

NatWest

Bankline Usability Improvements

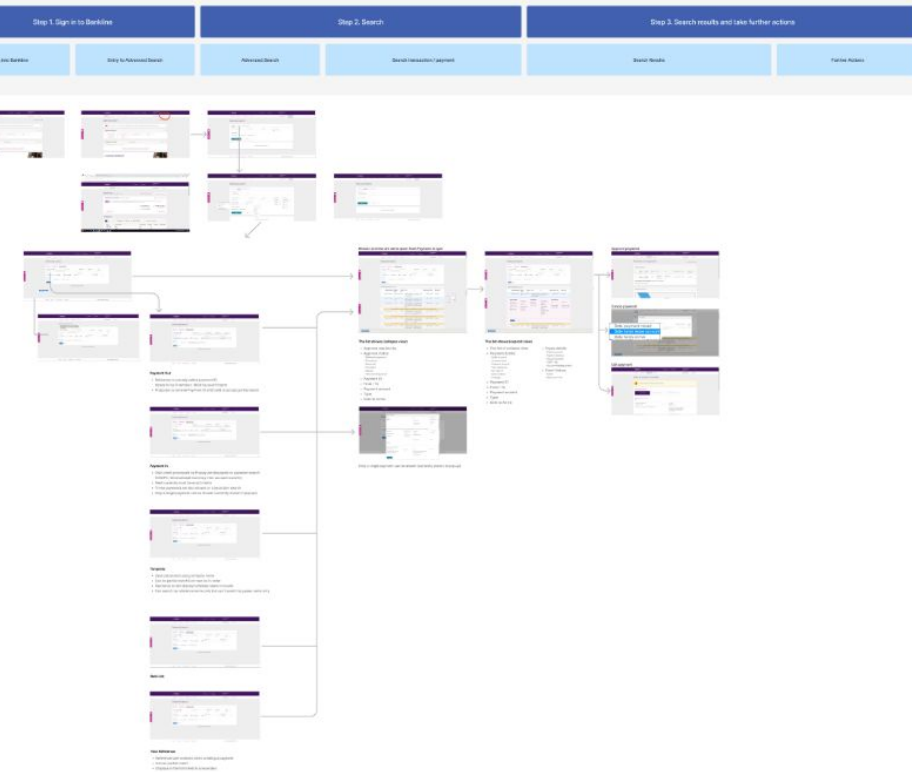
Challenge

NatWest is a prominent retail and commercial bank in the United Kingdom. They needed us to enhance their SME sector's existing platform; called Classic Bankline. Their customers were grappling with a convoluted user journey, encountering non-intuitive label names, and data values while attempting to access their audit-related reports.

Over 760 calls daily inundated NatWest's call center, prompting the need for a streamlined SME portal. Aside from improving usability, we needed to reduce the reliance of helpdesk support with a 12% target.

Role

User research (qualitative and quantitative), create customer journey maps, create user personas, conduct user testing, conduct ideation workshop, present insights to stakeholders.

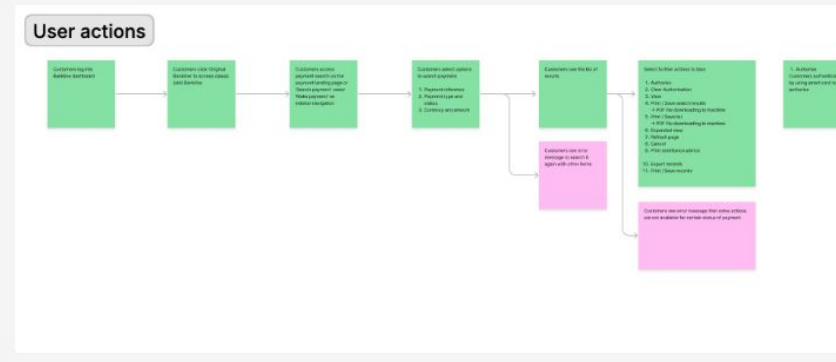
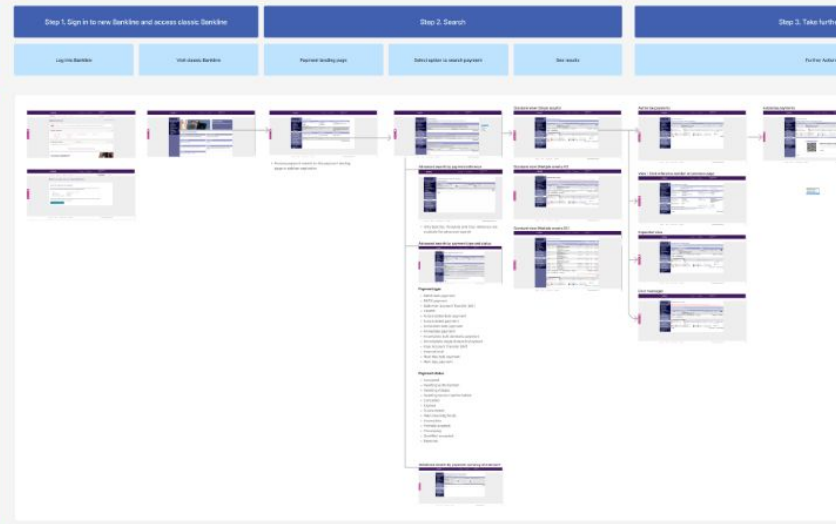


Timeline

Screenshots

User actions

Pain points



Persona 1 - Small Business
C B Digital

The Juggler
Assistant Management Accountant

I do a bit of everything, but I would like to do it in a more efficient way.

Optimiser Relator

About the business

Business type
Sell or produce their own services or manufacturing organization. Owner's typically a husband or wife or maybe even the finance manager. Finance team is small and essentially does little bit of everything, which is what inevitably drives Ian on. Some processes will happen on paper and on computers. Ian's looking to make the team more efficient, to make sure they're meeting, rather than reports being emailed in or paper-based.

Segment

- Business Banking
- Customer and Consultant

Bankline integrations

- No integrations

Approach to finance management

Company culture for innovation

Financial complexity Technological advancement

User behavior and key jobs

Background
Ian is the assistant of the company founder with a small range of responsibilities like uploads, he input all the day to day finance activity, either manually or using the report function from Sage into NBL.

Decision power

Very low Very high

Payment Search experiences
Ian uses Bankline daily to perform a large variety of tasks, however his main focus is raising payments and monitoring cashflow. Ian is not very familiar with the different methods of raising and searching payments and he loses time. He doesn't have authority to approve payments.

Intensity of Payment Search usage

Very low Very high

Payment Search satisfaction

Very low Very high

Device

Ways of using Payment Search

- Used on mobile payments
- Used on desktop access to National Security via software.
- Used on National Security (after clicking the search button on the homepage)
- Used to raise and search payments in order to get the amount of payments
- Used to type, take note, reference it, and send the payment to NBL or CSV
- Used on Digital Bankline
- Used to search for payments to raise and search for
- Used for support
- Used to search for specific IDs or tracking out to Client website.

Pain points and needs

- Bankline user struggles to have payment status on the screen and have the ability to export it into excel
- Bankline is searching for a transaction and payment associated
- There's a step of user feedback and user guidance
- Users need the flexibility to raise payments to another individuals address
- Not enough email or chat communication or going to payment agent
- Bankline needs to have consistency over payment process, user to investigation and alternative variety of location where different user experience is based

NatWest

Bankline Usability Improvements

The Process

Was a collaboration between the product owner, UX designer and myself as user researcher.

First, I met with internal stakeholders to better understand the product, and their business needs. Then, I planned, recruited and conducted two rounds of 1:1 user interviews with eight Bankline users from various sized companies. Once I had gathered the qualitative data, analyzed it, and identified the common pain points I then created an in-depth 15 min. survey that I strategically disseminated among 150 users.

To share my research findings a collaborative ideation workshop with my team and internal stakeholders took place, in which we collectively brainstormed ideas and prioritized pain points to achieve the best UX design solutions.

Persona 2 - Small Business
C B Digital

The Self-starter
Business owner

We have pretty simple needs. I just need financial information to be easily accessible.

Unexperienced Practical

About the business

Business type
Small company or a community interest company. It's been recently established and has few employees. The company consists only of the owner and the service that the company offers is provided by contractors. The business currently isn't making a significant profit. Finance management related needs are a few, but are expected to develop a lot over time. For now the owner manages all finances. The focus is on survival and growth, rather than optimization.

Segment

- Business Banking

Bankline integrations

- No integrations

Approach to finance management

Company culture for innovation

Technological advancement Structure of finances

User behavior and key jobs

Background
Ian is the assistant of the company founder with a broad range of responsibilities in the company. He inputs all the day to day finance activity, either manually or using the report function from Sage into NBL. It is essential for Ian to get his work done on time and as accurate as possible.

Decision power

Very low Very high

Payment Search experiences
Ian uses Bankline daily to perform a large variety of tasks, however his main focus is raising payments and monitoring cashflow. Ian is not very familiar with the different methods of raising and searching payments and he loses time. He doesn't have authority to approve payments.

Intensity of Payment Search usage

Very low Very high

Payment Search satisfaction

Very low Very high

Device

User personas for Bankline research

All Audit users use a date range to filter following event categories. User click and select all users (tick box).

Over 50% of users use the Audit to searching payments.

These users that use Audit search Payments do it because of habit or unaware of the Payment search.

Top used Event Categories:

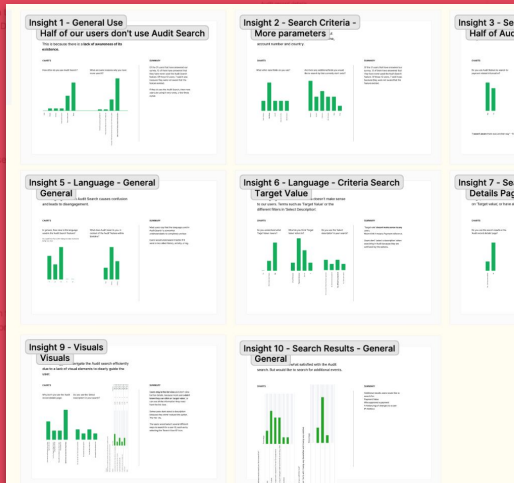
1. Payments (5)
2. Account Information (4)
3. Administration (3)
4. Statement Download (2)
5. Account Servicing (2)
6. New Bankline Functions (1)

Users prefer a minimum of 2 years months.

Users would like to search by:

1. Amount
2. Customer name
3. Account number
4. Country

Most users are happy with the results in the list view.



Synthesized survey results

NatWest

Bankline Usability Improvements

After reviewing the thirteen insights I had previously gathered, the team and I categorized them into three main themes:

Awareness: Users were not aware that certain features existed due to a lack of communication and visibility. We wanted to eliminate the need for users to embark on digital scavenger hunts.

Search: Users were confused with the various filters and the terminology being used. Our redesign focused on refining the language, transforming the search tool into an intuitive guide, seamlessly connecting users with the information they sought.

Search Results: Users felt stuck once obtaining the results due to missing visual components and the lack of actions such as the ability to export the data. Our goal was to empower our users to navigate efficiently and export data effortlessly.

General search criteria

Summary

How quickly can you find what you need? How many results do you get? How relevant are the results? How easy is it to filter and refine your search? How easy is it to save and share your search results?

Key Insights

- Users want to find what they need quickly and easily.
- Users want to see relevant results.
- Users want to be able to filter and refine their search.
- Users want to be able to save and share their search results.

Key Features

- Fast search results.
- Relevant search results.
- Easy to filter and refine search results.
- Easy to save and share search results.

Search Time Frames

Summary

How long does it take to find what you need? How long does it take to get the results you need? How long does it take to get the results you need?

Key Insights

- Users want to find what they need quickly.
- Users want to get the results they need quickly.
- Users want to get the results they need quickly.

Key Features

- Fast search results.
- Fast search results.
- Fast search results.

Select Description

Summary

How easy is it to select the description you need? How easy is it to select the description you need? How easy is it to select the description you need?

Key Insights

- Users want to select the description they need easily.
- Users want to select the description they need easily.
- Users want to select the description they need easily.

Key Features

- Easy to select description.
- Easy to select description.
- Easy to select description.

User ID

Summary

How easy is it to find the user ID you need? How easy is it to find the user ID you need? How easy is it to find the user ID you need?

Key Insights

- Users want to find the user ID they need easily.
- Users want to find the user ID they need easily.
- Users want to find the user ID they need easily.

Key Features

- Easy to find user ID.
- Easy to find user ID.
- Easy to find user ID.

Target Value

Summary

How easy is it to find the target value you need? How easy is it to find the target value you need? How easy is it to find the target value you need?

Key Insights

- Users want to find the target value they need easily.
- Users want to find the target value they need easily.
- Users want to find the target value they need easily.

Key Features

- Easy to find target value.
- Easy to find target value.
- Easy to find target value.

Validation & Prompting

Form Validation

Summary

How easy is it to validate the form you need? How easy is it to validate the form you need? How easy is it to validate the form you need?

Key Insights

- Users want to validate the form they need easily.
- Users want to validate the form they need easily.
- Users want to validate the form they need easily.

Key Features

- Easy to validate form.
- Easy to validate form.
- Easy to validate form.

Support

Contacting Helpdesk

Summary

How easy is it to contact the helpdesk you need? How easy is it to contact the helpdesk you need? How easy is it to contact the helpdesk you need?

Key Insights

- Users want to contact the helpdesk they need easily.
- Users want to contact the helpdesk they need easily.
- Users want to contact the helpdesk they need easily.

Key Features

- Easy to contact helpdesk.
- Easy to contact helpdesk.
- Easy to contact helpdesk.

Search Results - List

Search Results - More info...

Summary

How easy is it to see more information about the search results you need? How easy is it to see more information about the search results you need? How easy is it to see more information about the search results you need?

Key Insights

- Users want to see more information about the search results they need easily.
- Users want to see more information about the search results they need easily.
- Users want to see more information about the search results they need easily.

Key Features

- Easy to see more info.
- Easy to see more info.
- Easy to see more info.

Search Results - Unneces...

Summary

How easy is it to see unnecessary information about the search results you need? How easy is it to see unnecessary information about the search results you need? How easy is it to see unnecessary information about the search results you need?

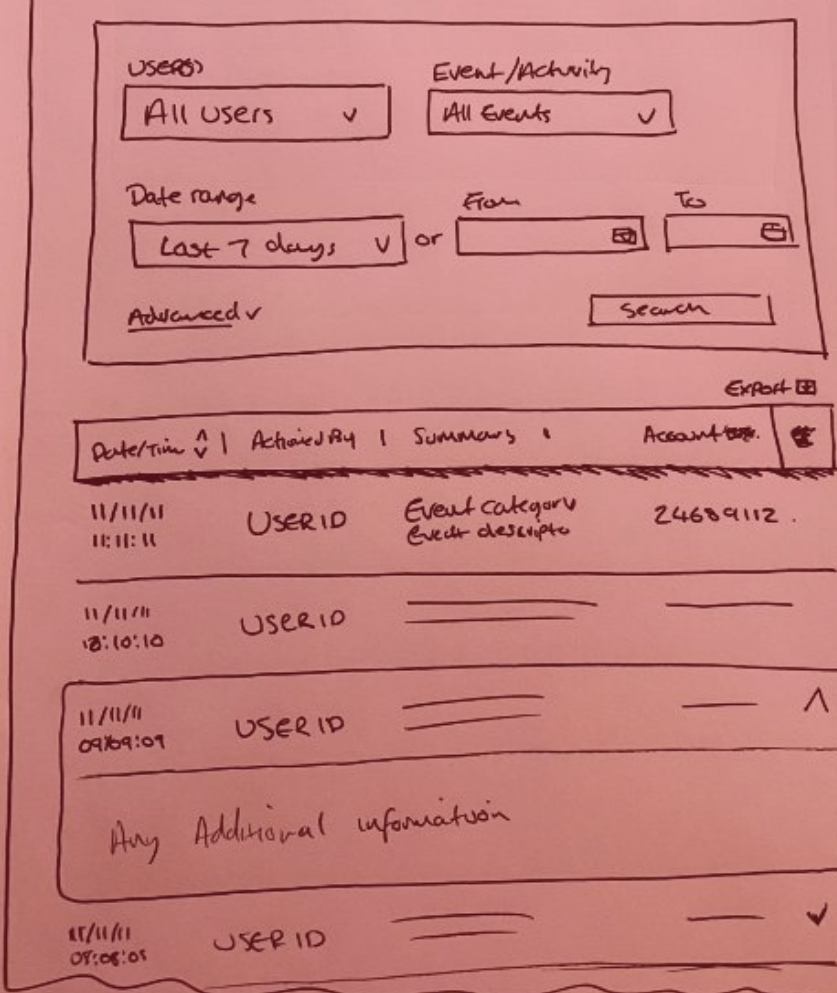
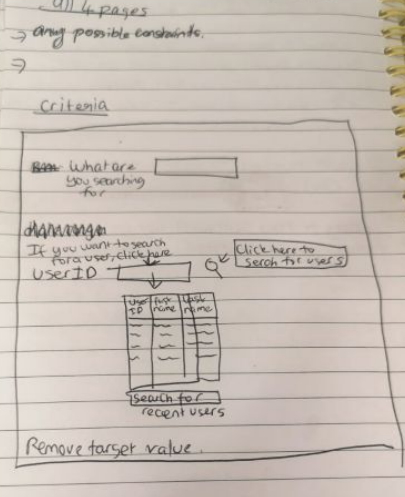
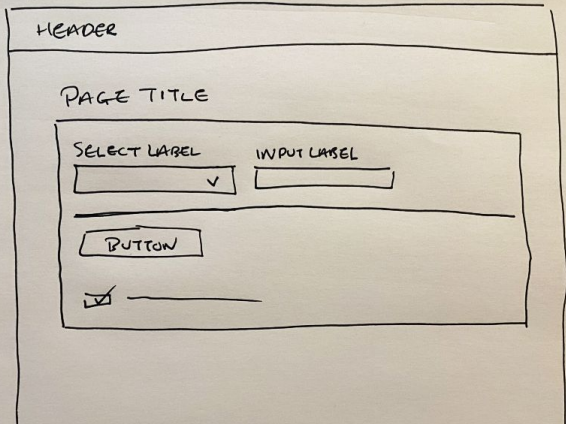
Key Insights

- Users want to see unnecessary information about the search results they need easily.
- Users want to see unnecessary information about the search results they need easily.
- Users want to see unnecessary information about the search results they need easily.

Key Features

- Easy to see unnecessary info.
- Easy to see unnecessary info.
- Easy to see unnecessary info.

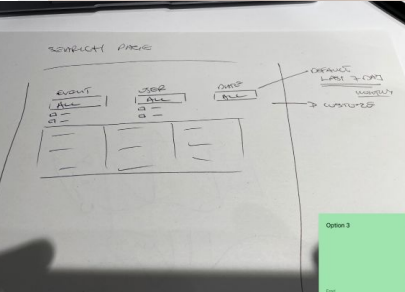
SEARCH



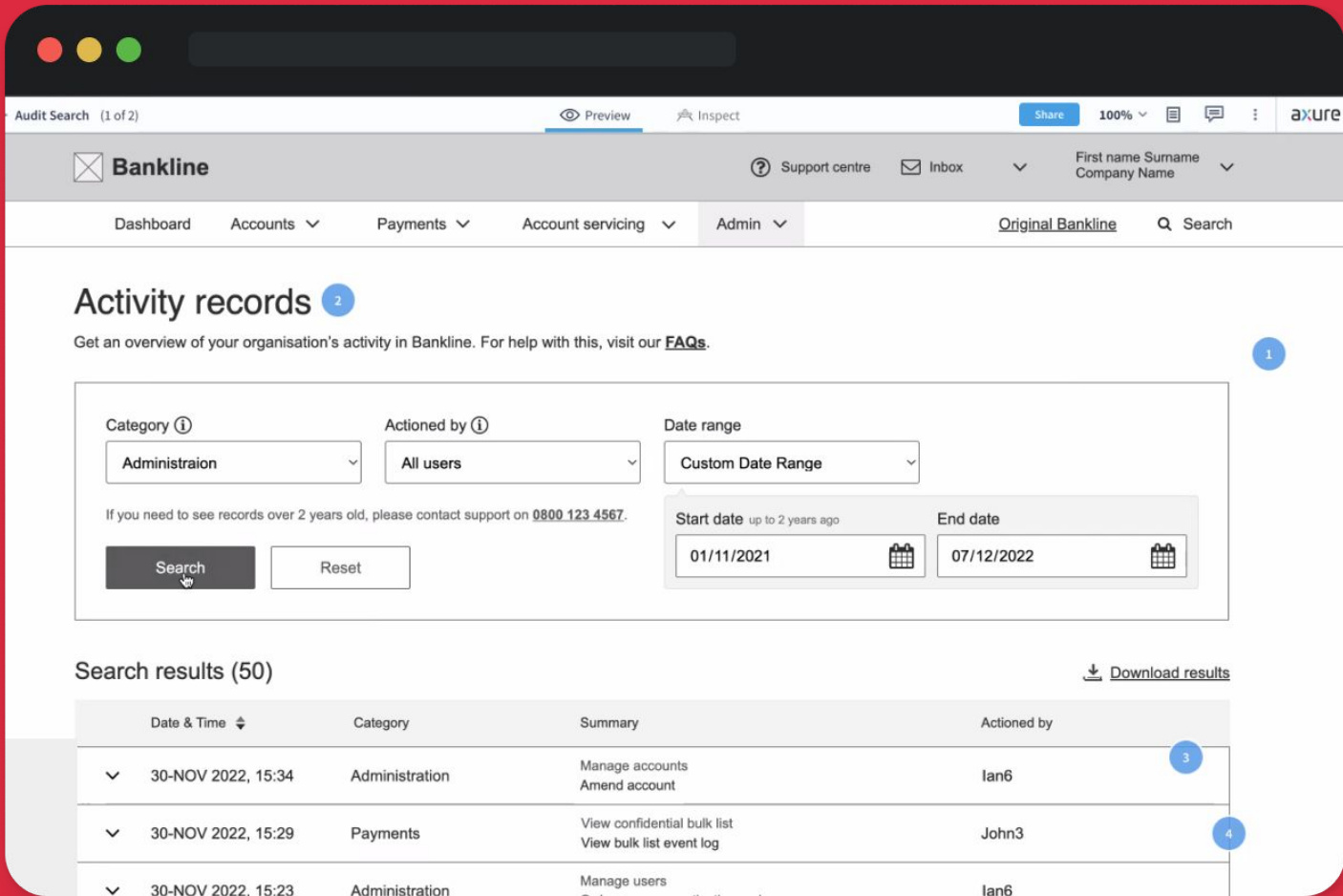
Search anything, Event Category, Description, User ID

To: [opens calendar 24 months limit] From: [opens calendar 24 months limit] [Last 14 days] [SEARCH]

	V	# of rows					
V	DATE	TIME	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
	Feb 5, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
	Feb 10, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
	Feb 10, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
	Feb 5, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
	Feb 10, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
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	Feb 5, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
	Feb 10, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
	Feb 5, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME
	Feb 10, 2021	10:30:51	USER ID	EVENT CATEGORY	DESCRIPTION	REFERENCE	CUSTOMER NAME



Sketches from ideation workshop





NatWest / Bankline Usability Improvements

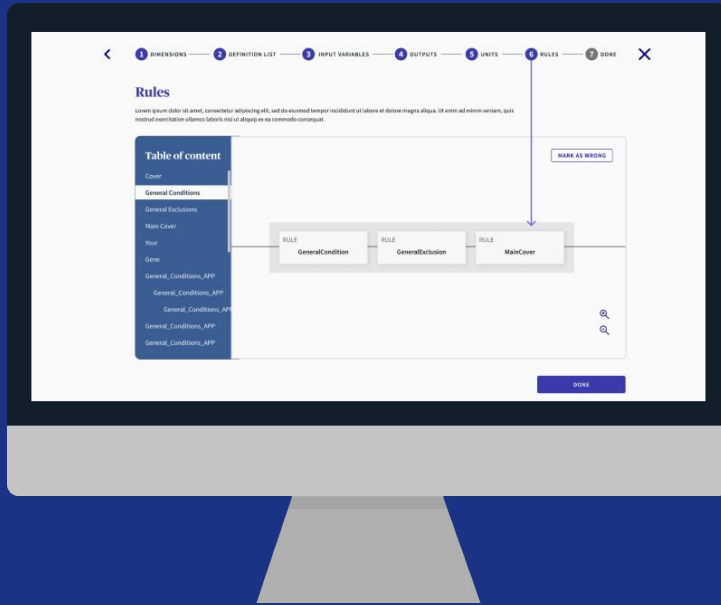
Solution

Our UX designer was then able to synthesize the collaborative workshop ideas that we had brainstormed, and create a low fidelity wireframe for me to use for testing five individual users who had originally participated in my initial interviews.

To alleviate our user pain points we designed a solution that included: visually impactful elements, refined terminology, an enhanced search feature, the ability for users to export results, and the option to hide sensitive financial information.

By the end of my contract we had enhanced NatWest's SME user experience platform, and solidified the project's success with overwhelmingly positive feedback.





Design concept integrating AI in the user flow.

AXA

Digitalizing the Policy Process

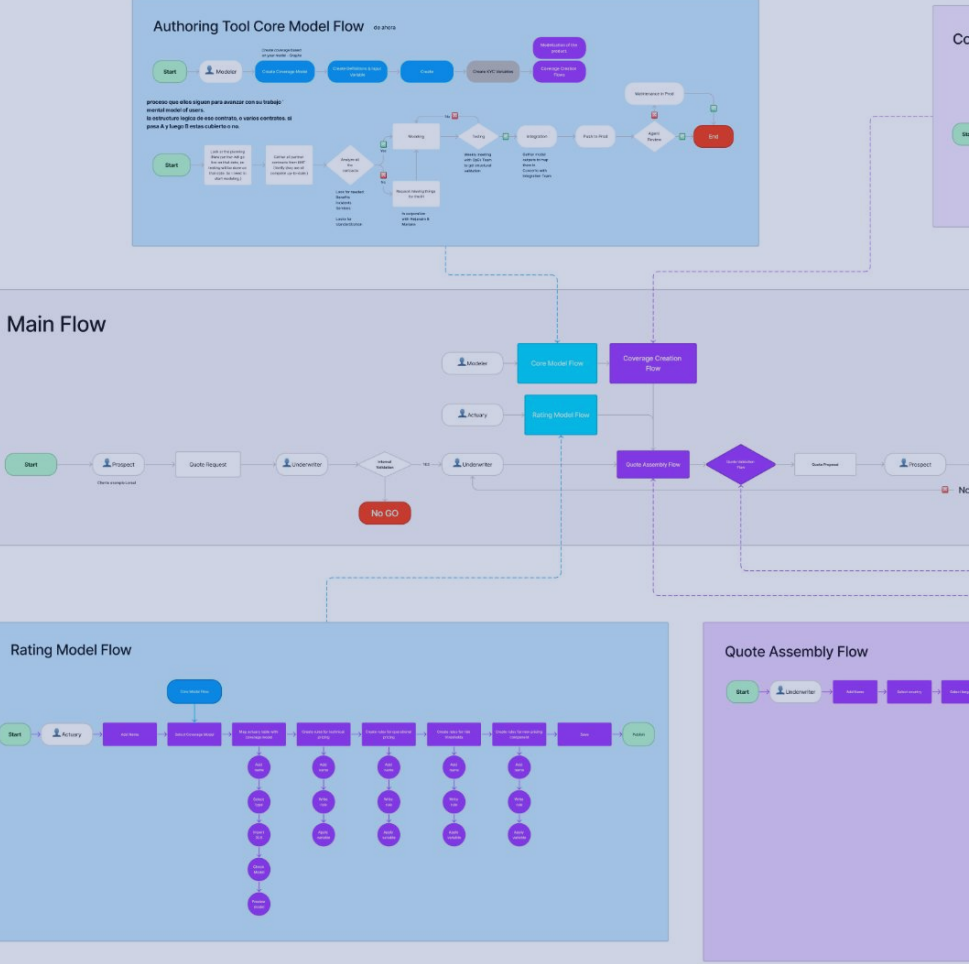
Challenge

As part of AXA's innovation team I was assigned the formidable task of enhancing the UX/UI of one of their internal tools named, Computable Contracts aka: CC. This software tool had been built two years prior by AXA's own top engineers, although, without any design principles applied.

CC is a powerful software aimed at helping AXA's global entities digitize their contracts building process, and facilitate its agents with a speedier customer claims service.

AXA's other main objective with CC was to white label it, and create such an indispensable tool that other insurance companies would want to purchase it.

But CC users were encountering enormous challenges navigating its complex interface. One user said he needed an entire year to learn how to use the product, though appreciating its benefits.



AXA

Digitalizing the Policy Process

Role

UX design lead, user research (qualitative and quantitative), create customer journey maps, create user personas, conduct user testing, review all UI design, mentor junior UI designer, design QA, support developers, and present design concepts to stakeholders.



Data gathered from the 1 hour remote interviews with CC users.

Most users are testing using the widget tool, not the testing

Yes, in the testing phase in our front end, we try all the models made in Authoring Tool.

Let's try the Coverage rules instead of the rules. I would say, I have a few. Are you the one that will be responsible for the coverage rules? I will be the one that will be responsible for the coverage rules because at the end of the day we need to be able to get out of the coverage tool because at the end of the day we need to be able to cover our advertising cost.

featu

Users
consum
testing
Covera
modell

Users would like to always have

I would need to monitor it and, very often, and I would need to be able to monitor it.
User 1
User 2

mod

Users are interested in AI

I think some steps could be more simple or more fast. I think some of the steps can be automatized. We take too much time to create.
User 3

When
all the
trust A
human
modell

Users say the modelling process is very repetitive and time consuming.

In a first iteration, instead of being by actually to use an API, it is better. You give me all the criteria, terms, need the full entries, some parameters, objectives and all the requirements.
User 2

Use

Users say that the modelling process takes a very long time and requires completing several menial repetitive tasks.

When we model we have to test several times before the go live.
User 3

The whole process will take 25 days.
User 3

I understand that creating a product can be long because you need to pay attention to many steps.
User 4

It takes so much time maybe to understand the product policy and the good understanding of how to model, fast, and for sure we need to know how to use the tool to model fast.
User 3

It took me a lot of effort actually to do things because in my job, I don't have the time to really do the product policies or the existing tool used. The whole world of product because all the terms and all the variables in the background, they need to be aligned with the other systems.
User 2

Use

So I wonder, it doesn't really behave the same, but it gets some core concepts, like the way you describe type of questions, it's not able to present much stuff in a consistent way, so we need to suggest matter separate, CLAIM HANDLER.
User 4

It's very long to do. We have several things to do in the product modelers, and it's very long. It's not difficult but it is long.
User 5

I don't have access to the systems stuff like this and I need to have it done by someone else. So I need to wait.
User 4

It takes me a week or so. Jans it takes him a day or so.
User 4

Proto Persona 2
Profile: "to model the products in the most efficient way"

Demographics / Behaviours
Demographics / Behaviours
Summary statement about the profile:

Age	Gender	Education	Occupation
25-34	Female	High School	Marketing

Proto Persona 1
Profile: "to facilitate the policy claims process the best way"

The Insurance PM
Research and collect data related to both customers and the business itself.

Demographics / Behaviours
Demographics / Behaviours
Summary statement about the profile:

Age	Gender	Education	Occupation
35-44	Male	University	Product Manager

Decision power
Very low to Very high

Intensity of Computable Contracts usage
Very low to Very high

Obstacles
- Lack of data
- Lack of time
- Lack of resources

Needs
- Early add (personnel)
- Complex cover (products or online products)
- Options to the (policy parts)

Obstacles
- Policy takes a lot of time to they use
- Coverage
- Check to test

Needs, Obstacles, Desires

- NEED** - Needs to have an overall view
- NEED** - Need to bring resources for approvals
- NEED** - Ability to share, comparison of tag in features such as "Policy 2"
- NEED** - Easy and quick understanding
- NEED** - Easy add to CSP, Definitions, Products, Plans and
- NEED** - Complex several contracts in one model
- NEED** - Options to do

Key insights and personas created from user interviews.

AXA

Digitalizing the Policy Process

Process

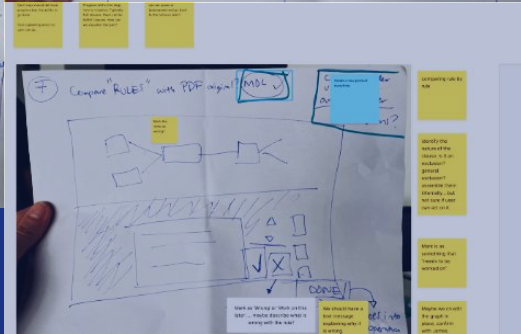
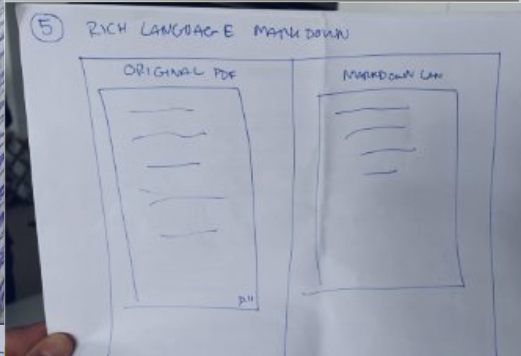
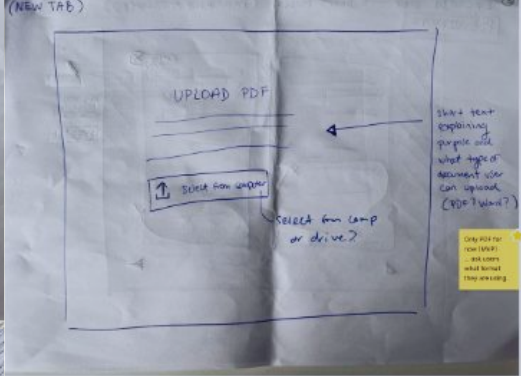
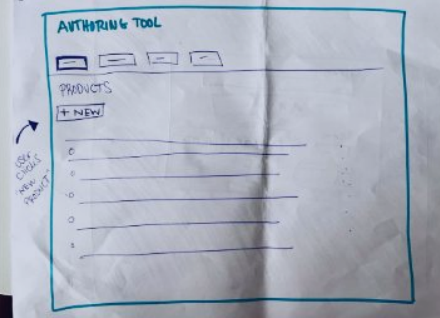
As Lead UX Designer I addressed the urgency for streamlining, and simplifying the usability of CC with a more intuitive and pleasantly efficient experience.

I immediately delved into the preliminary existing research and once gaining a comprehensive understanding of the current landscape, I meticulously mapped out the user flows, crafted proto personas for my 1:1 subsequent user interviews.

Eight users were interviewed for gathering valuable insights. Four were managers with approval rights, and the other four were modelers who were responsible for the core modeling process by inputting manually extensive data.

The main insight encountered was the tool's repetitiveness and its time consumptive challenges on its users, demanding a tedious core modeling process.

This revelation guided my team's main strategy to singularly focus on improving the core modeling process.



Examples of sketches I made

AXA

Digitalizing the Policy Process

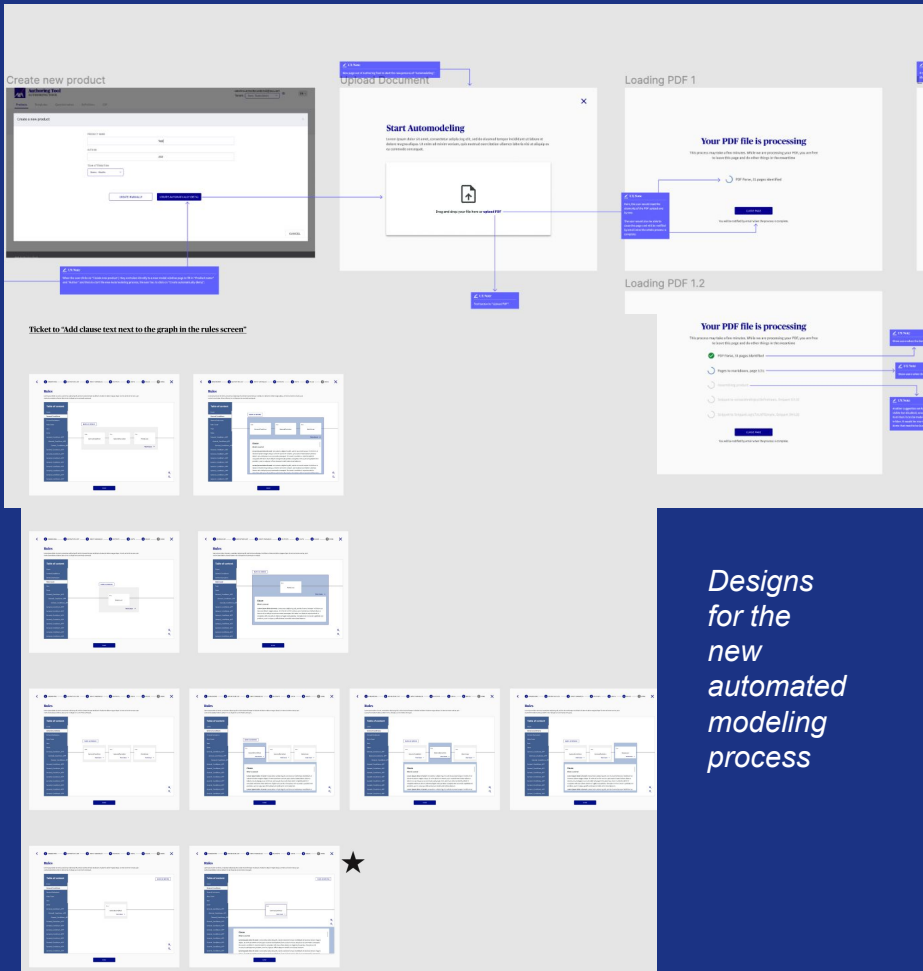
Solution

I, with the engineers and the Product Owner (PO) collaborated, brainstorming solutions for providing an easier, and more condensed core modeling process.

We concluded after many tests and brainstorming sessions that leveraging AI technology would transform the duration of the modeling process from a one month endeavor to a matter of days.

I identified and mapped out the steps involved in the current modeling process in order to assign what appropriate tasks should be delegated to AI.

Once we refined the proposed steps and were approved by our internal stakeholders, with the assistance of my junior UI designer I created a hi-fidelity prototype for further testing to validate our hypothesis.



AXA

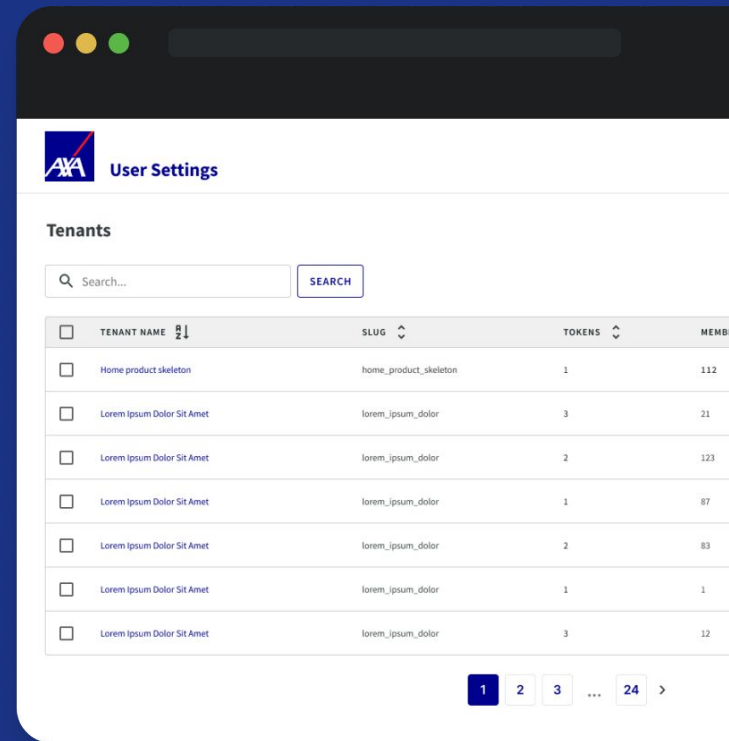
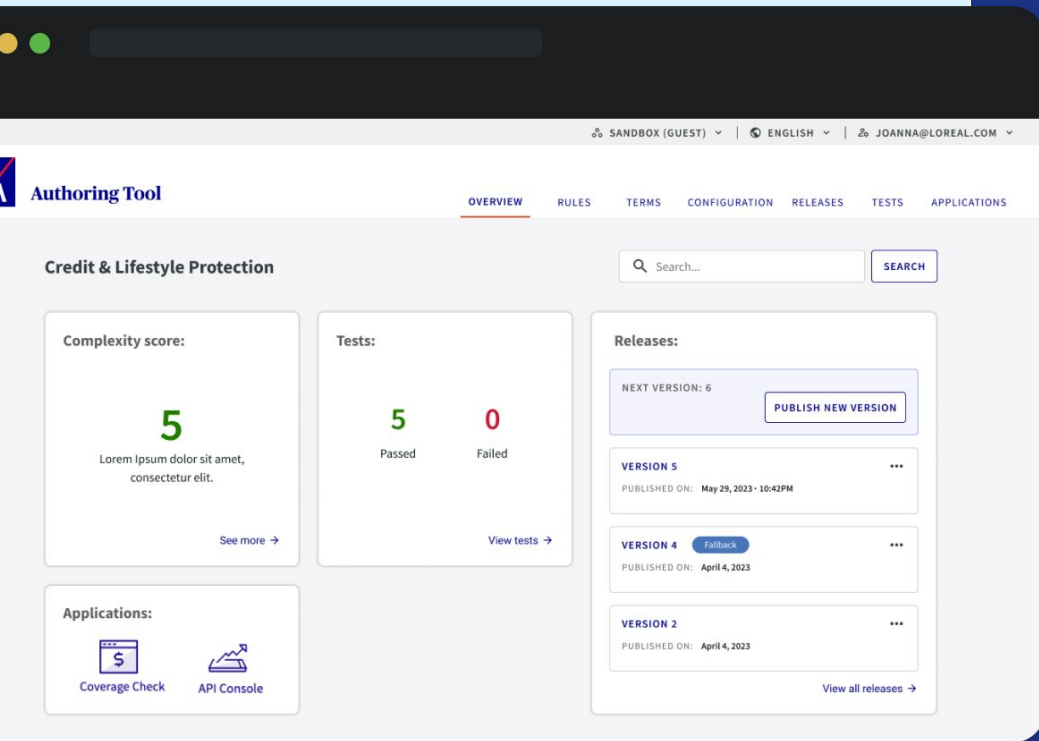
Digitalizing the Policy Process

I conducted user tests for assessing the new automated modeling process, with our newly integrated AI GPT technology.

I conducted a remote workshop that involved twelve users for testing and providing preliminary feedback on our first iteration. The response was very positive, but also filled with doubts and concerns for how precise the technology could actually function. To help ease eliminate the user's worries we provided them with the ability to review the AI's completed work and highlight any errors made.

Throughout the Computable Contracts' revamping, other smaller design projects like, enhancing the dashboard, refining the user settings page, simplifying visual components, removing extraneous information, and optimizing data tables across the program were taken care with a consistent vision amongst the team and I.

We were delighted to hear from the PO that the users have expressed much excitement with the UX/UI enhancements, and underscored the positive impact it's had on their overall experience.



Final design proposal for the CC dashboard and User Settings section.

Check out my travel photography website I
built with HTML and JavaScript →

Thank you for your interest.

Enjoy!



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