

Lester Jones
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Portfolio





Lester Jones

The UX
Researcher/Designer
with Expertise in
Informing Results
Delivering UX
Efforts for Large
Impactful
Systems.

www.lesterajones.com

Academics

2021 - Graduate Certificate - Cyber Security
Harvard Extension School

2009 - Masters - Information Architecture and
Interaction Design
University of Baltimore

2005 - AAS - Computer Information Systems
Baltimore City Community College

2000 - B.Sc. - Zoology and Botany
University of the West Indies

Special Sauce

- Experience Leading Nation Spanning Ethnographic Studies
- Expert in Generative UX Research Methods
- Experience working with Large Scale Systems that Impact Millions of Users
- Experience with both UX Research and UX Design Methods
- Professional Photographer, Drone Pilot and Overlander
- Experience working in Confidential Environments
- Strong Science Background



Click to Chat

Implement an In-house Designed and Built Technician / Customer Chat Application
to increase the Customer Communication Efficiency of the Agency.

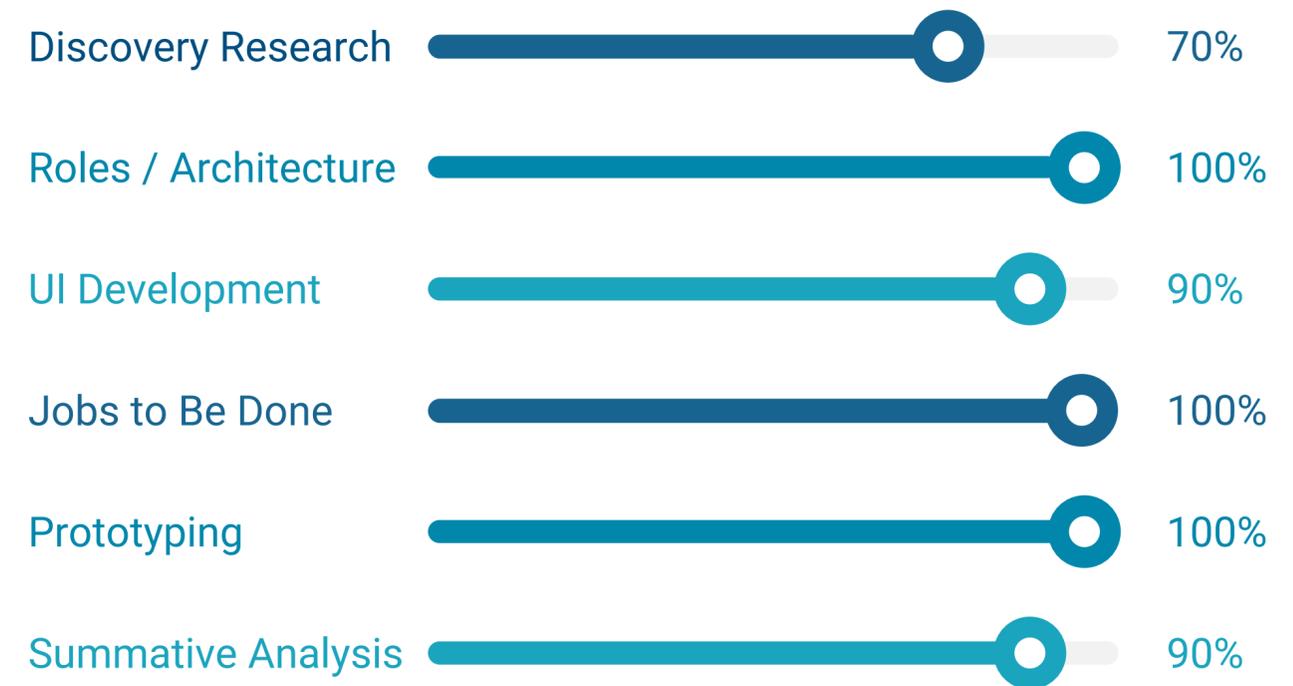


Role: UX Lead

UX Team Size: 1.5

Project Management: Agile

My Contributions



Tools:

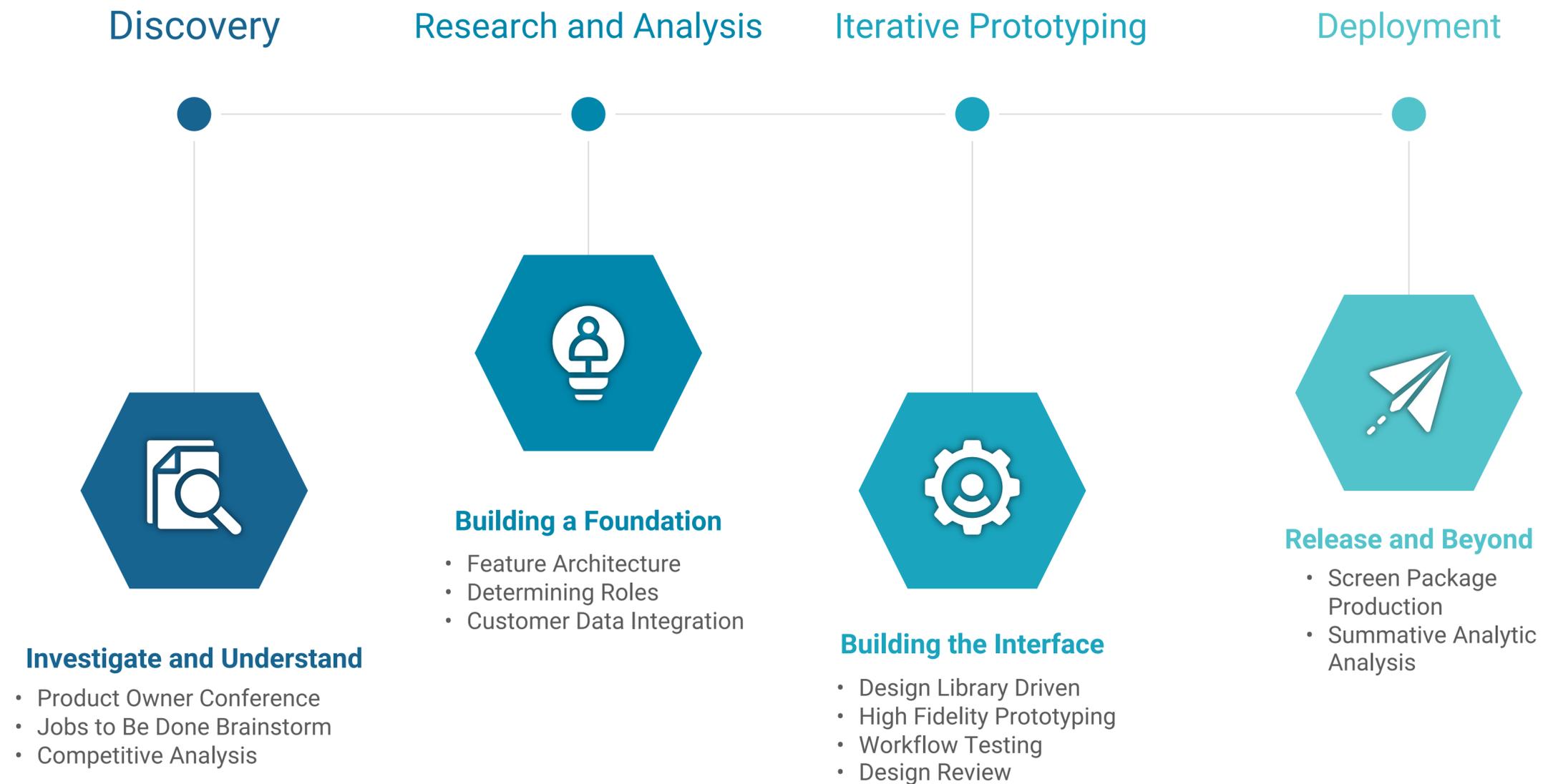
axure

mach⚡form
Est. 2007

balsamiq®

 Figma

The Design Process



01

Discovery

The preliminary phase in the UX-design process, here it involved:

- Conference with the Product Owner
- “Jobs to be Done” Brainstorming
- Researching the problem space
- Framing the problem to be solved and determine the scope
- Gathering enough evidence and initial direction on what to do next

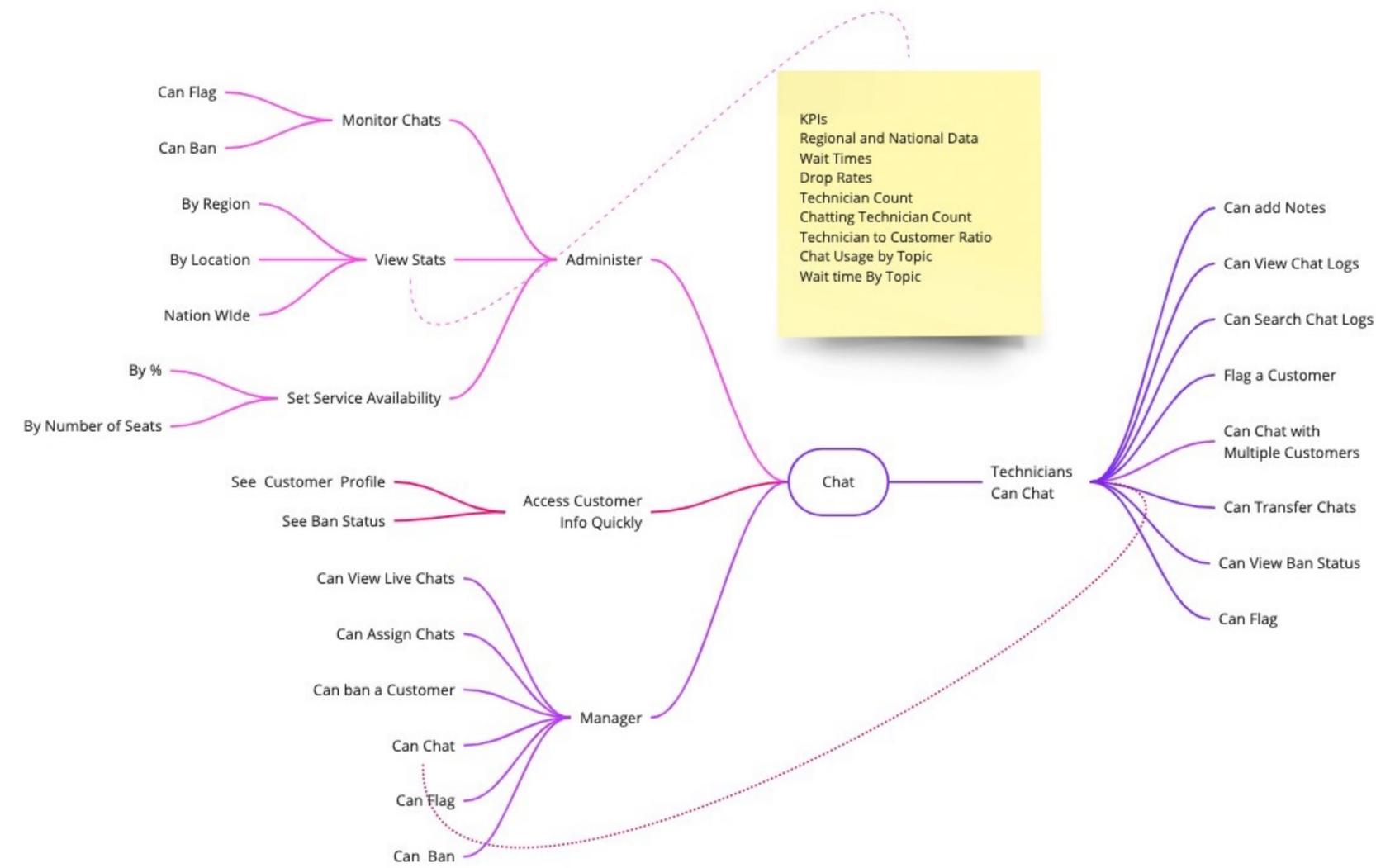
Discovery

Jobs to Be Done

Deep Dive

I facilitated a “Jobs to be Done” Brainstorming effort to determine the functions that was needed for this Customer Chat Application

The results were captured in a Mind Map



Discovery

Comparative Analysis

Invent and Simplify

The Key Takeaways from this analysis were as follows

- Visualize Data displayed in KPIs wherever possible
- Segment KPI by Functional and Regional Groups
- Give Technicians Name Masking capabilities to protect their own privacy
- Allow flagging and banning of obscene customers
- Give technicians chat transcript search and retrieval capabilities
- Allow managers “look in” and chat transfer ability
- Allow customers text formatting tools
- Allow for in-system note taking

zendesk



slack



MOXO



INTERCOM

HubSpot

02

Research and Analysis

After the Product and Project Scope and the Desired Outcomes are determined, Research and Analysis is done to determine the specific next steps need to insure the success of the overall effort.

Research and Analysis Roles

Customer Obsession

Based on information gathered from the Product Owner Conference the **User Roles** and their **Capabilities** were determined.

1. Administrator
2. Technical
3. Manager



Administrator

Turn Chat Application On and Off, View KPIs, Flag and Ban Customers, Set Chat Availability %



Manager

“Look in” on Chats, Chat with Customers, Assign Technicians to Chats Chats, Flag and Ban, Create Notes, Search Customer Transcripts



Technician

Chat with Customers, Flag, Create Notes, View Customer History, Search Customer Transcripts

Research and Analysis Features Architecture

Customer Obsession

A determination was made regarding the features needed for the Click To Chat application in concert with the following

1. Production Owner Team
2. Development Team
3. User Representatives and Subject Matter Experts

Click to Chat Feature Architecture

Administrator	Manager	Technician
Chat Service	Technician Management	Chatting
Toggle Chat Service On and Off	View Assigned Technicians	Start to Chat
Set Chat Availability %	View Chat Channels	End Chat
Toggle Dynamic Help On and Off	View Ongoing Chats	Transfer Chat
Toggle Click to Call Back On and Off	Assign Technician to a Chat	
Set Dynamic Help Start Time	Assign Technician to a Channel	Chat Records
		Create Note
KPIs To Monitor	Chatting	Search for Note
Technician Availability %	Start to Chat	View Note
Chatting Customers	End Chat	Search Transcripts
Waiting Customers	Transfer Chat	View Transcripts
Available Customers		View Uploaded File
	Chat Records	
Regional/National KPIs	Create Note	Name Format
Customer Wait Time	Search for Note	Change Name Format
Chat Capacity	View Note	
Customer Drop Rate	Search Transcripts	
	View Transcripts	
Extended Trends	View Uploaded File	
Customers vs Technicians		
	Name Format	
Topic Usage Numbers	Change Name Format	
Account Assistance		
Retirement and Medicare		
Online Application		
Disability		
Other Issue		
Visualization Triggers		
Blue/Yellow/Red Threshold for		
Customer Wait Time		
Chat Capacity		
Customer Drop Rate		

03

Iterative Prototyping

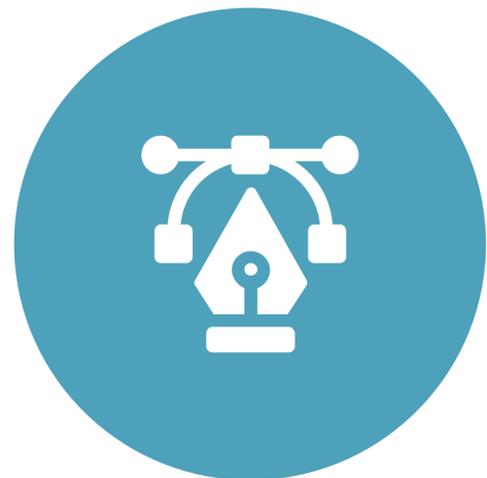
Prototypes were built user SSA's Design Library, known as the **Universal Experience Framework (UEF) - Internal Application Kit**. The prototyping process was:

- Iterative and Integrated with Periodic Testing and Review
- Agile with delivery 2 Sprints ahead of Development Needs

Tool: **Axure RP**

Iterative Prototyping Prototyping

Deliver Results



Click to Chat

Technician

Change My Status Select between Available and Unavailable. When in Available Status you can initiate chats. Status Available Change Status	Chat With A Customer Click the button below to initiate a chat with the next available customer from your assigned queues. Chat with Customer
Change My Name Format Change the way your name is displayed to the customer. Name Format Joe Change Name Format	Search Click search button to search for customer's communication history. Search

Technician Home Page

Click to Chat

Chat Controls Transfer Chat to a Queue Transfer Chat to a Manager Create Notes Search Exit Current Chat	Chatting with Diana Prince - Retirement or Medicare Joe Technician 5/10/2017 - 10:20 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Diana Prince 5/10/2017 - 10:21 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Joe Technician 5/10/2017 - 10:22 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Diana Prince 5/10/2017 - 10:23 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Joe Technician 5/10/2017 - 10:24 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Diana Prince 5/10/2017 - 10:25 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.	Personal Information Social Security Number (SSN) 123-12-1234 Phone Number 410-123-1234 Email Address dprince@gmail.com Banned Status None Citizenship USA - Citizen Proof of Citizenship Birth Certificate Electronic Services Address 123 New St New York City, New York 21207 USA Mailing Address 123 New St New York City, New York 21207 USA Parent/Mother's Name at Her Birth Theo Smith Parent/Father's Name Zeus Smith Date of Birth November 10, 1977 Place of Birth New York City, New York USA
Response to Customer (6400 characters maximum) B I [Rich Text Editor] Characters remaining: 6000 Send		Exit

Main Chat Interface

Click to Chat

Search History

Search History by Social Security Number

123-12-1234

Select Topic(s)

- All Topics
- Account Assistance
- Retirement or Medicare
- Disability or SSI
- Online Application
- Other Issue

Select Date Range

Start Date End Date

Chat History Search

Click to Chat

Diana Prince

Search History

Diana Prince, SSN#: 123-12-1234

Search Chat History by Social Security Number

123-12-1234

Select Topic(s)

- All Topics
- Account Assistance
- Retirement or Medicare
- Disability or SSI
- Online Application
- Other Issue

Select Date Range

Start Date End Date

Diana Prince

Technician?	Topic	Created	Channel	View
Mark Simon	Retirement	2/23/2016	CTC	Transcript
Leland Lynch	Retirement	3/24/2016	CTC	Transcript
Abraham Williams	Retirement	4/25/2016	CTC	Note - Lost Documents
Benny Morris	Retirement	5/26/2016	CTC	Note - Update Submitted
Julia Quinn	Retirement	6/27/2016	CTC	Note - Supplemental

Chat Search Results

Click to Chat

Diana Prince

Create Note

Create Note for Diana Prince, SSN#: 123-12-1234:

Title:

Note 1

Enter Note Contents

B I

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Characters remaining: [500]

Note Creation

Click to Chat

Diana Prince

Note
Diana Prince, SSN#: 123-12-1234

Title: Lost Documents Created On: 3/12/2015 - 10:00am Topic: Disability
Created by: Mark Simon

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In viverra orci a eros elementum, eget facilisis odio commodo. Aliquam dictum leo eleifend ex vulputate, sed blandit magna laoreet. Sed varius ante egestas tortor lobortis, ut consectetur tortor elementum. In auctor ultrices dolor, non ullamcorper tellus mattis quis. Quisque finibus lacinia massa sed ullamcorper. Pellentesque nulla dolor, finibus eu diam ut, vestibulum venenatis nulla. Vestibulum gravida est sit amet nunc mattis, nec placerat lacus elementum. Morbi non ultricies lorem, eu posuere arcu. Fusce feugiat convallis odio vitae iaculis. Maecenas ullamcorper, ante placerat pretium gravida, nibh metus suscipit lectus, eget posuere mauris nunc eget lorem. Praesent vitae nibh vehicula, cursus quam a, consectetur nulla.

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Close Print

Viewing and Existing Note

Click to Chat

Diana Prince

Chat Transcript: Account Assistance - 05/10/2017
Diana Prince, SSN#: 123-12-1234:

Joe Technician 5/10/2017 - 10:20 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Diana Prince 5/10/2017 - 10:21 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Joe Technician 5/10/2017 - 10:22 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Diana Prince 5/10/2017 - 10:23 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Joe Technician 5/10/2017 - 10:24 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Diana Prince 5/10/2017 - 10:25 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Joe Technician 5/10/2017 - 10:22 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Diana Prince 5/10/2017 - 10:23 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Joe Technician 5/10/2017 - 10:24 am
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.

Close Print

Chat History for a Customer

Click to Chat

Technician Administrator Management Information **Controls**

Global Configuration Settings

<p>Click to Chat Availability</p> <p>Turn Click to Chat On or Off Globally</p> <p><input checked="" type="radio"/> On <input type="radio"/> Off Save</p>	<p>Click to Call Back Availability</p> <p>Turn Click to Call Back On or Off Globally</p> <p><input checked="" type="radio"/> On <input type="radio"/> Off Save</p>
<p>Dynamic Help Availability</p> <p>Turn Dynamic Help On or Off Globally</p> <p><input checked="" type="radio"/> On <input type="radio"/> Off Save</p>	<p>Dynamic Help System Initiated Time</p> <p>Set Dynamic Help System Initiated Time</p> <p>3 Minutes Save</p>
<p>Click to Chat Percentage Access</p> <p>Set the percentage of MySSA users that have access to Click to Chat</p> <p>50% Save</p>	

Global Configuration

04

Deployment and Beyond

Passing over the screen package to development is not the end. **Sumatative Testing** to validate design decisions and provide guidance for update is essential.

Deployment and Beyond

Efficiency Improvements

Deliver Results

Customer Obsession

The Click to Chat application was very successful and achieved all of its stated goals and allowed for several advantages some of which are listed below.

1. Technical Contact Efficiency
2. No More Customer Information Retrieval
3. Improved Contact Continuity



400% Technician Contact Efficiency

Technicians have demonstrated the ability to chat with 4 customers at once as opposed to one at a time when using the telephone.



Removal of Customer Information Retrieval

Technicians used to spend up to 3 minutes retrieving customer details for each interaction. This is now done automatically when the connection is made.



Contact Continuity

A Technician can now retrieve and search transcripts and quickly see the exact content of previous conversions reducing research time in miscommunication.

Deployment and Beyond Unfettered Design

Learn and Be Curious

I enjoyed working on this project so much but I felt limited but the SSA's UEF design Library for so I freed myself of and created a design free of this constraint.

Design Tool: Figma

Enjoy



Deployment and Beyond Unfettered Design

Learn and Be Curious

Administrator Dashboard

Key Features

- Modern Design
- Light / Dark Switcher
- Real Time Monitoring of Chat KPI's
- Visualization of KPI with Color Coded Indicators
- "Real Time" Customer vs Technician Tracker
- Report Generator



Deployment and Beyond

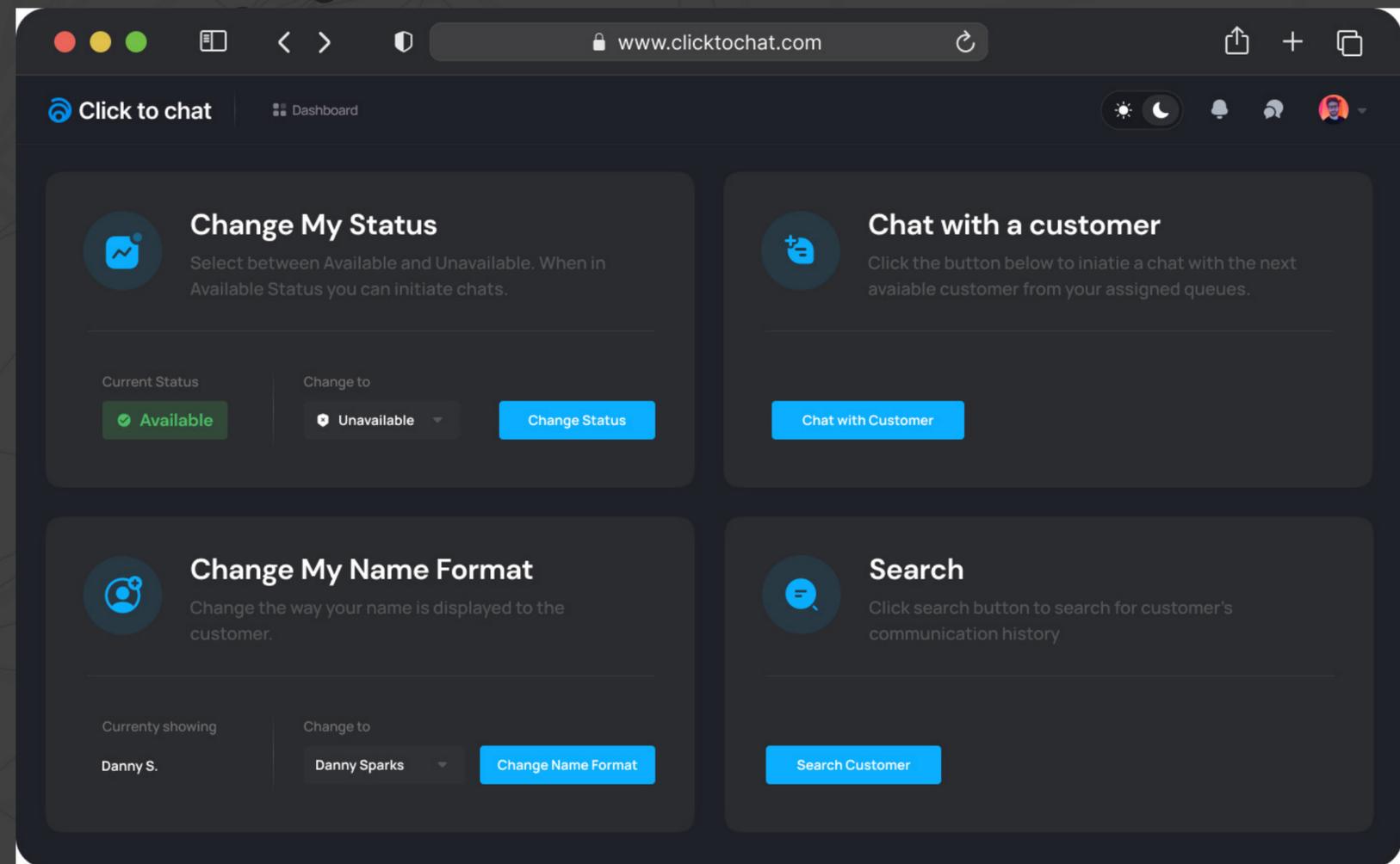
Unfettered Design

Learn and Be Curious

Technician Home Page

Key Features

- Technician Status Changer
- Technician Status Indicator
- Technician Home Name Masker
- Customer Search



Deployment and Beyond Unfettered Design

Learn and Be Curious

Administrator Dashboard

Key Features

- Customer Typing Indicator
- Alternate Technician/Customer Response formatting
- Automatic Customer Data Display

The screenshot displays the 'Click to chat' Administrator Dashboard. The browser address bar shows 'www.clicktochat.com'. The dashboard includes a 'Chat Control' sidebar with options like 'Transfer chat to a queue', 'Transfer chat to a Manager', 'Create Note', 'Search', and 'Exit Current Chat'. The main chat window shows a conversation with 'Diana Prince - Retirement or Medicare' (Online). The chat history includes:

- Customer: "Contrary to popular belief, Lorem Ipsum" (Today 11:52)
- Agent: "Don't look even slightly believable. If you are going to use a passage of Lorem Ipsum, you need to be sure there isn't anything" (Today 11:54)
- Customer: "Sure. Taking a screenshot right now." (Today 11:59)
- Customer: "Screenshot.png" (Today 11:59)
- Agent: "Thanks you! I'm reporting this internally" (Today 11:54)
- Agent: "Hey Diana, it's Nirob from Cuboid. Following back on what we said early, we have made some improvements so please update your application to get fix the problem. Thanks" (Today 11:54)
- Customer: "Typing...." (Today 11:54)

The right sidebar shows 'Personal Information' for Diana Prince:

- Email: renaeavu@bej.edu
- Phone: (562) 975-6876
- Social Security Number (SSN): 152-12-4251
- Other Info: Banned Status (None), Citizenship (United States of America), Proof of Citizenship (Birth Certificate)
- Address: Electronic Services Address (45 Roker Terrace, Latheronweel, KW5 8NW, London) and Mailing Address (45 Roker Terrace, Latheronweel, KW5 8NW, London)
- Parents Info: Mother Name (Theo Smith), Father Name (Zeaus Smith), Date of Birth (November, 10 1997)

The chat input area at the bottom includes a rich text editor with options for bold, italic, underline, and link, along with a 'Type your message...' field and a send button.

Deployment and Beyond

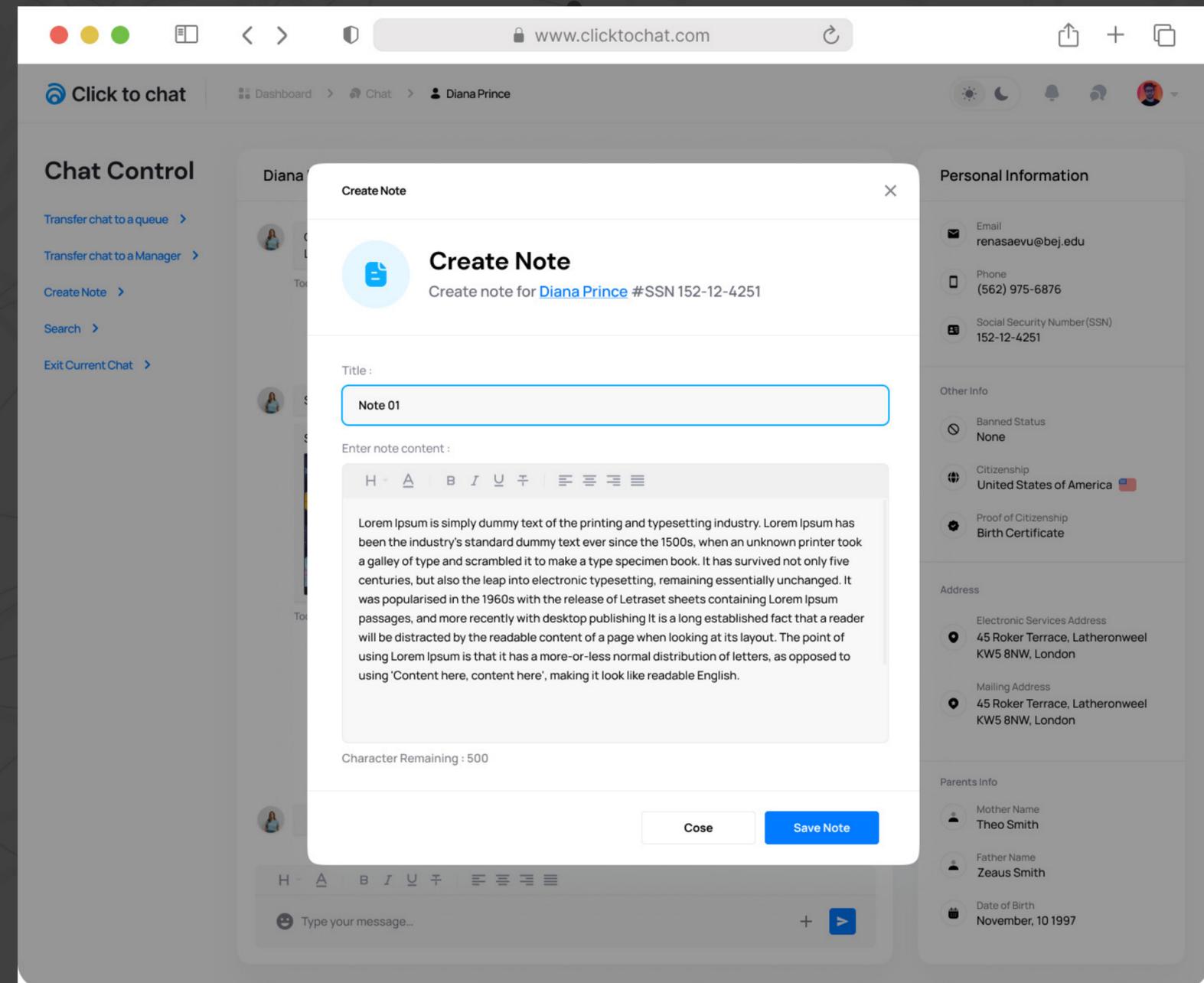
Unfettered Design

Learn and Be Curious

Administrator Dashboard

Key Features

- Visual Text Editor
- Text Character Counter



Deployment and Beyond Unfettered Design

Learn and Be Curious

Search History

Key Features

- Fragmented Search
- Animated Date Picker

The screenshot displays the 'Search History' modal in the Click to chat application. The modal is titled 'Search History' and is associated with the user 'Diana Prince #SSN 152-12-4251'. It features a search bar containing the SSN '152-12-4251'. Below the search bar, there is a 'Select Topics' section with a list of topics and their respective counts: 'All Topics' (325), 'Account Assistance' (12), 'Retirement or Medicare' (5), 'Disability or SSI' (32), and 'Online Application Other Issue' (22). A 'Select Date Range' section includes 'Start Date' and 'End Date' fields, both set to '12 April 2022'. There are 'Search' and 'Create New Note' buttons. The search results are displayed in a table with columns for 'TECHNICIAN', 'TOPIC', 'CREATED', 'CHANNEL', and 'VIEW'. The results are for 'Diana Prince' and include entries for Albert Flores, Theresa Webb, Floyd Miles, and Darrell Steward, all with the topic 'Retirement' and created on '12 Sep 2022'. Each entry has a 'Transcript' link. A 'Close' button is located at the bottom right of the modal.

TECHNICIAN	TOPIC	CREATED	CHANNEL	VIEW
Albert Flores	Retirement	12 Sep 2022	CTC	Transcript
Theresa Webb	Retirement	12 Sep 2022	CTC	Transcript
Floyd Miles	Retirement	12 Sep 2022	CTC	Note -Lost Doc..
Darrell Steward	Retirement	12 Sep 2022	CTC	Note -Update ..



Outcome

Successfully Provided the UX Artifacts and Guidance to inform the implementation of
An Internally Developed Customer/Technician Chat Application
that increased Customer Contact Efficiency by 400%
and removed the time consuming customer info location process.