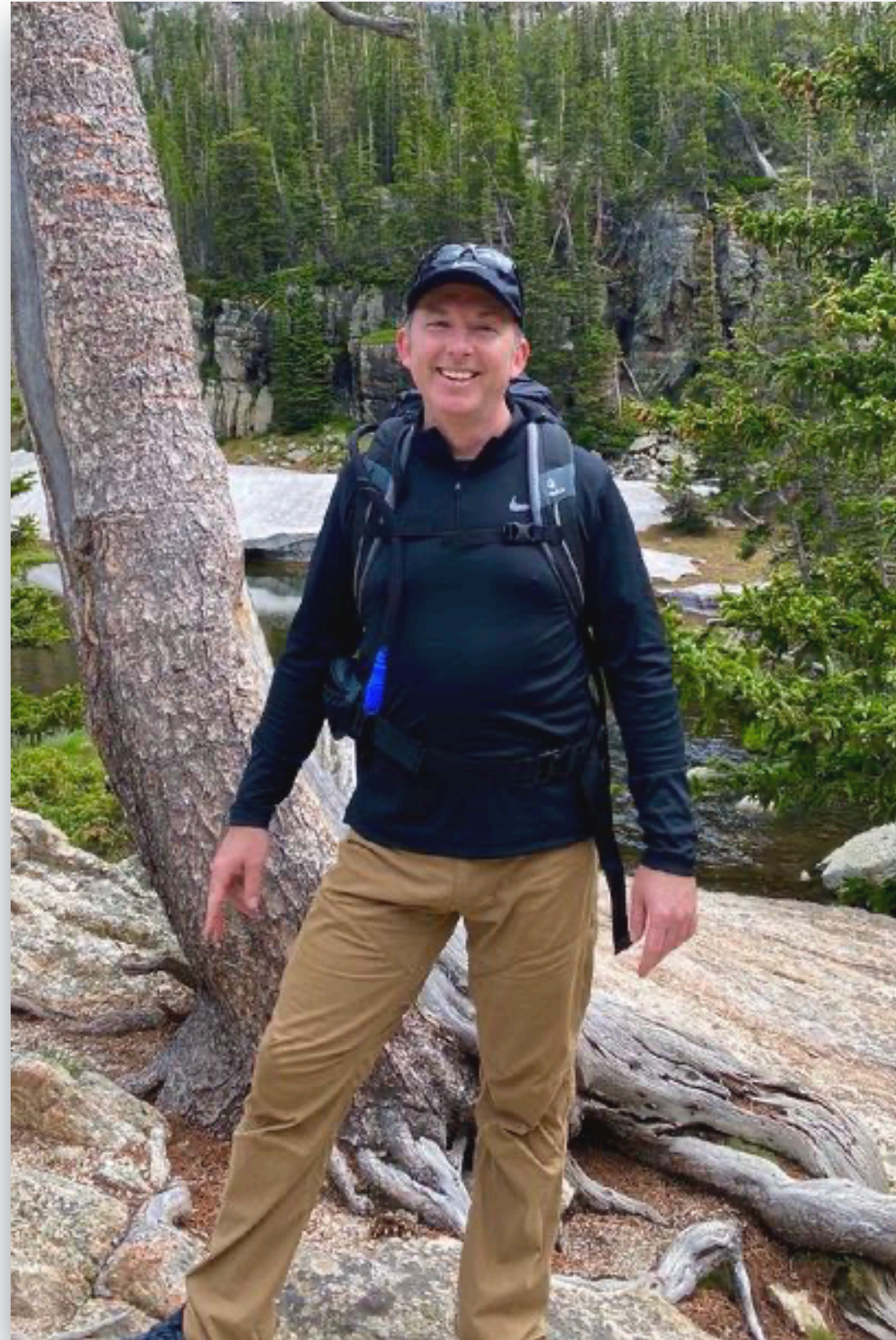


CHAUNCEY  
JACK  
DUNLAVEY

CUSTOMER EXPERIENCE LEADER

PORTFOLIO

## About Me . . .



Hi, I'm Chauncey Jack Dunlavey!

In 2017, I launched Experiences by Design to help organizations create extraordinary customer experiences across every touchpoint. Using Voice of the Customer insights, I guide organizations in designing exceptional service, products, and digital innovations.

Professionally, I have a passion for using Voice of Customer insights to help teams create extraordinary experiences and solve complex problems. I offer a comprehensive marketing background — focused on building brands, driving acquisition growth, strengthening loyalty, and improving service delivery — in travel, hospitality, financial services, ed-tech, and healthcare.

My experience has focused on improving customer experiences through product, service, and digital innovation. I also have experience managing advertising, social media, market research, community, and public relations, as well as crisis management.

Personally, I love adventure travel, kayaking, hiking and exploring new places. I'm obsessed with customer experiences — always thinking about ways to improve every touchpoint.

There's opportunity everywhere . . .

## Let's Collaborate !

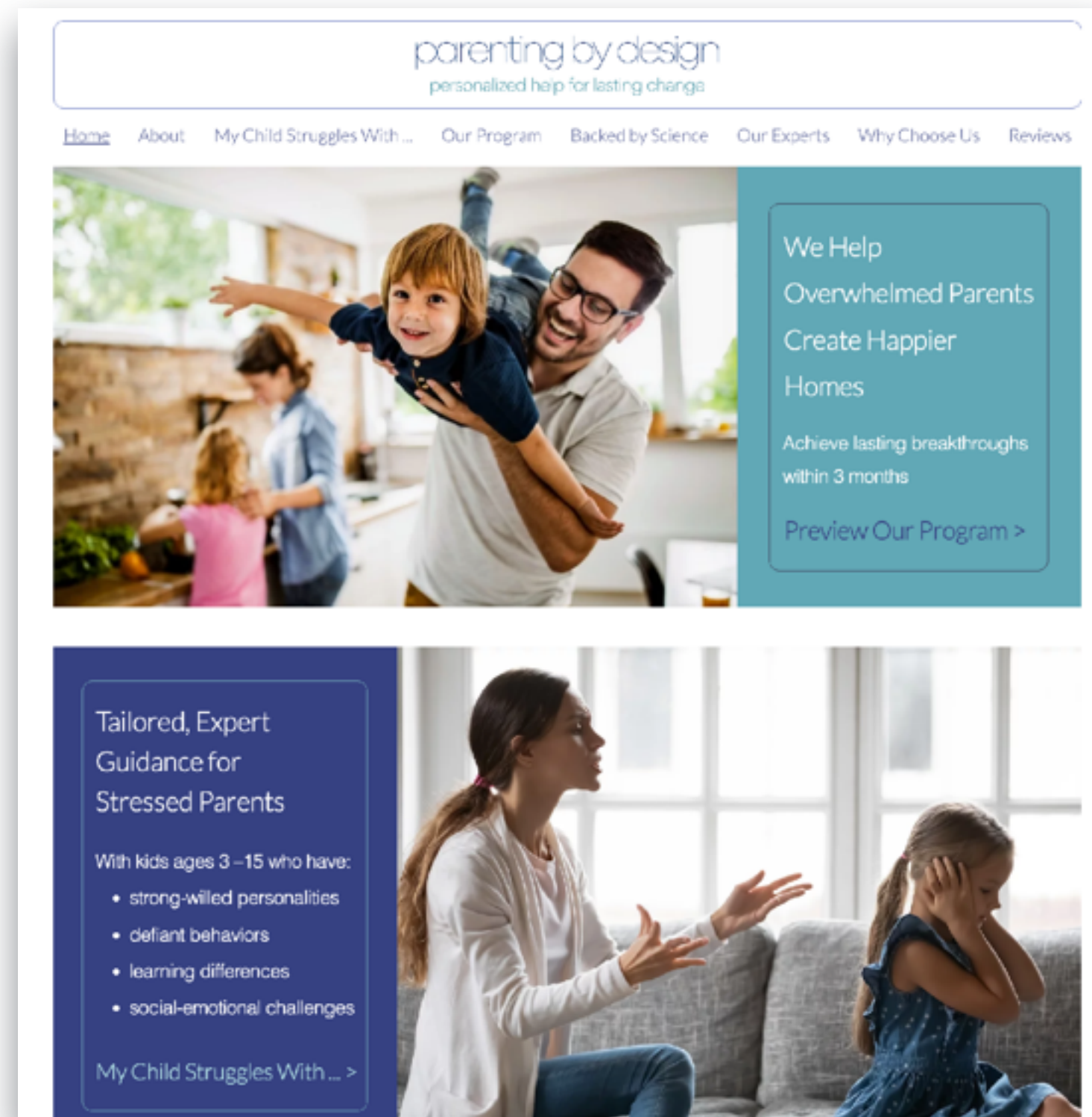
# Experiences by Design: Customer Insights + Design Research

Managing Director, Customer Experience

Guiding organizations in creating breakthrough products, services, and experiences  
by uncovering frustrations, unknown problems, and unmet needs



# Personalized, Expert Guidance For Overwhelmed Parents



## Product & Service Design via Insights: First-To-Market Service

### CHALLENGE

Uncover ways to help parents who are overwhelmed with strong-willed children who experience social-emotional challenges and/or have learning differences.

- Determine the depth of unmet needs, audience size, and viability
- Design a solution with customization and uniformity to scale
- Develop product-market fit without insurance coverage
- Understand the decision-making process, barriers, and key influencers

### DISCOVERY + SCOPE OF ENGAGEMENT

- In-depth, insight interviews with key audiences & stakeholders
- Market research and competitor SWOT analysis
- Journey Mapping, Brand & Product Development
- Manage product development, service delivery, and website launch:
  - Ideation, Prototyping, Design, Content, and Testing

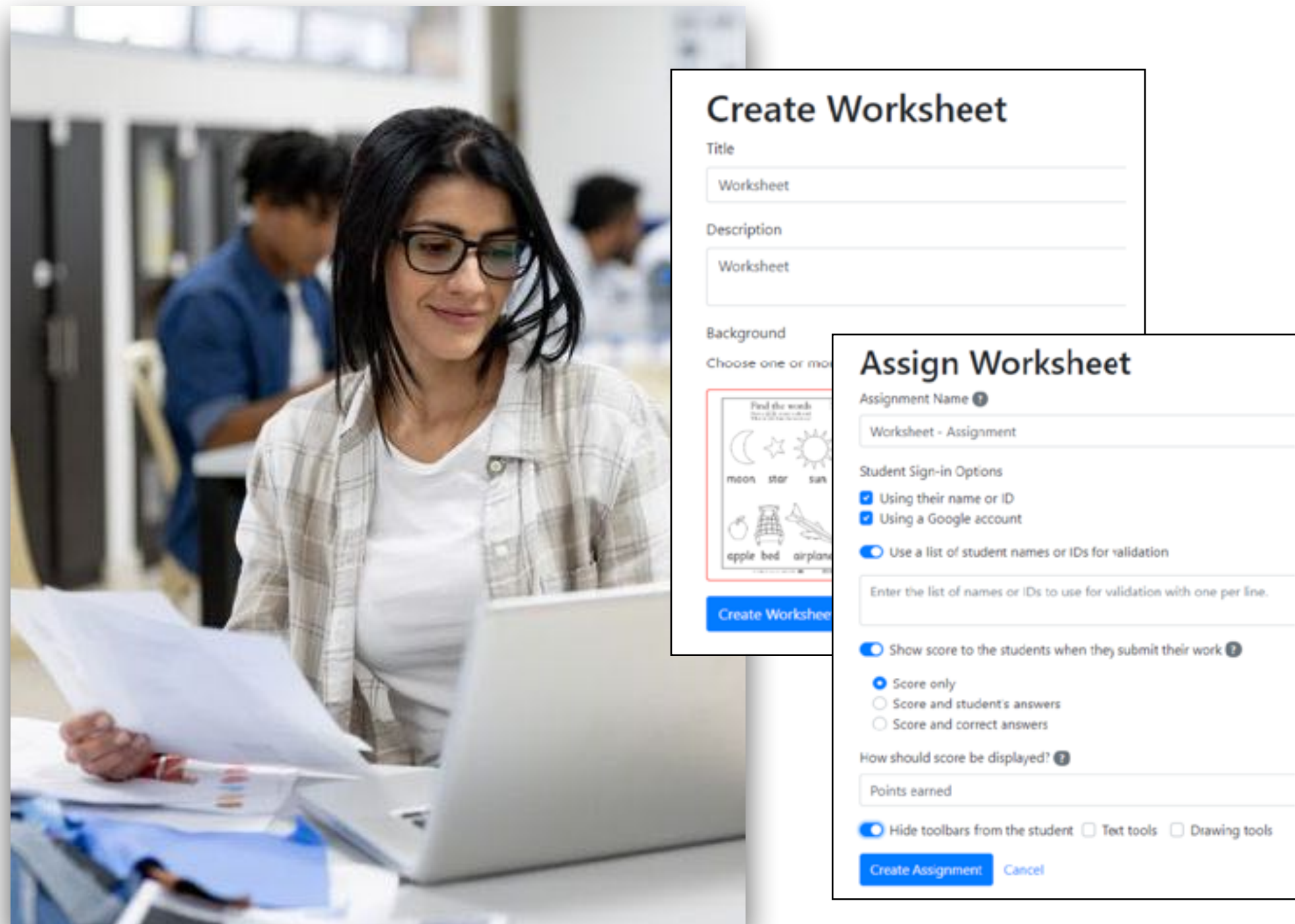
### SOLUTIONS

- New brand with unique selling proposition & competitor differentiation
- First-to-market, 'all-inclusive' tailored program with expert instructors

### RESULTS

- Excellent brand perception, program feedback, and user testing scores
- New program scheduled to launch in Fall 2025

## Helping Teachers & Students In Time of Need



## Solving Problems Via Digital Innovation: First-To-Market Product

### CHALLENGE

Explore challenges teachers were having with the abrupt shift to online learning during the pandemic:

- ◉ Research if a new digital product could solve an unmet need
- ◉ Create a solution with sustained need once on-site learning returned
- ◉ Develop a long-term financial growth plan, with free access during the economic downturn

### DISCOVERY

Insights uncovered with elementary and middle school teachers:

- ◉ Paper, non-electronic versions of worksheets and tests were widely used in classrooms before the pandemic
- ◉ Worksheets were shared among teachers, had no centralized organization / storage system, and were often uneditable
- ◉ Teachers spent an average of 8 hours a week manually grading
- ◉ With distance learning, students had to print, write on, scan, and upload worksheets to submit assignments; a similar process for teachers.
- ◉ No systematic way of tracking specific skills students were struggling with, or tracking progress in learning new skills.

continued ...



## SOLUTION

Provide teachers with the ability to scan worksheets & convert them into editable, interactive activities, with auto-grading and success tracking.

### Main Features

- Edit text, embed videos and hyperlinks, rearrange problems, add content, and change question types
- Create answer keys with auto-grading capability
- Assign activities to a school, classroom, or student
- Access data on success rates by: classroom, student, skill type, individual problem, or activity
- Customizable library filing system

### Tiered Pricing Model

Free — Core Features & Functionality:

- First-year registrants received lifetime access

Paid — Robust Features & Functionality:

- Integration with learning management systems and grade book software platforms; additional features

## SCOPE OF ENGAGEMENT

- Voice of Customer research using:
  - In-depth Insight Interviews
  - Diary Studies
  - Teacher Surveys
  - Search Engine Keyword Traffic Analysis
  - Concept & Usability Testing
- Competitor SWOT Analysis
- Catalog assignment types & assessment formats across multiple grades and subjects

## RESULTS

2020-2021 School Year — Free

- 25,000+ teachers registered
- 1M+ assignments submitted

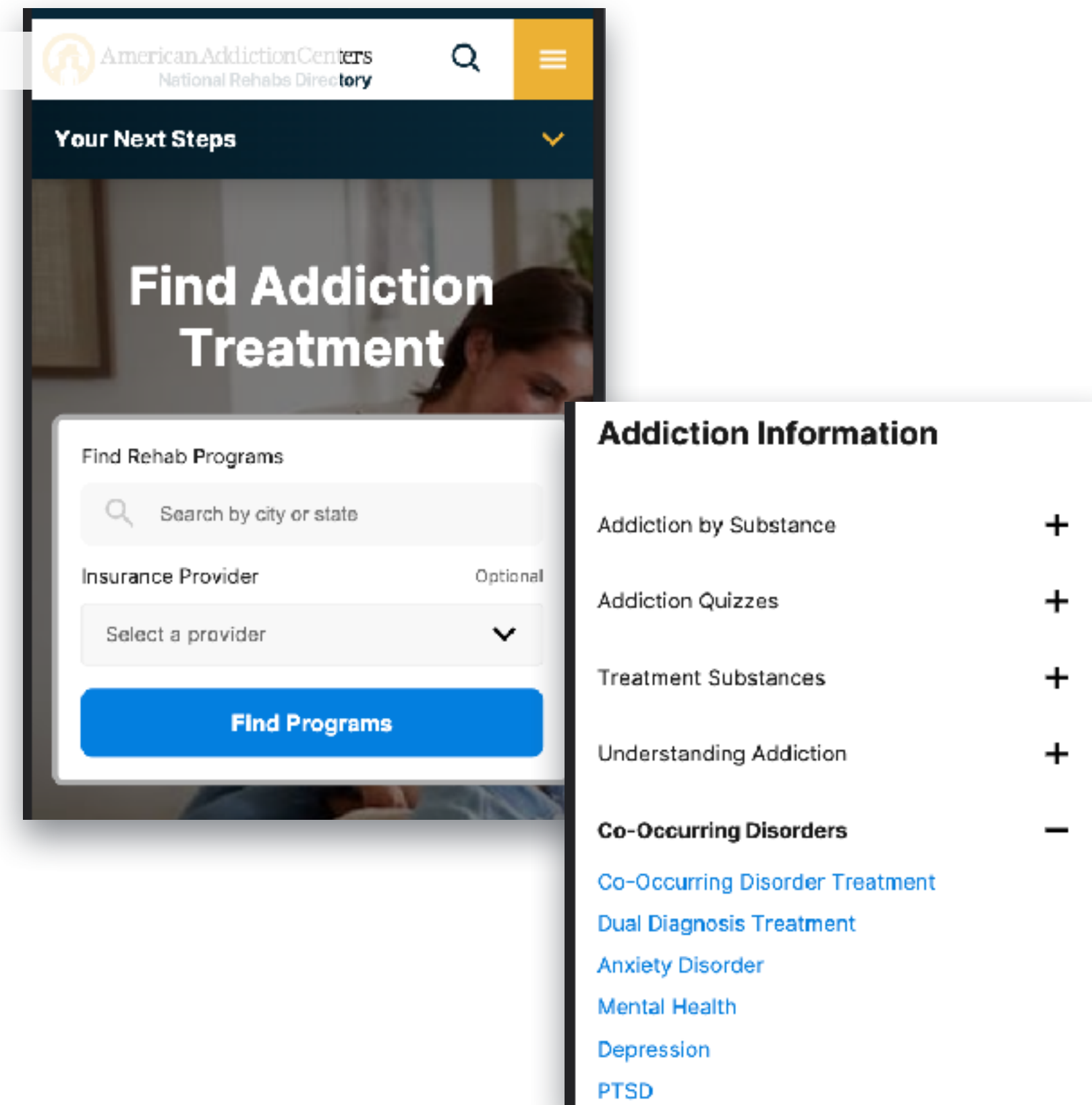
2021-2022 School Year

- \$900,000 revenue

2024-2025 School Year Projection

- \$10.2M in revenue
- 400,000 registered teachers

# Building Trust & Motivating Change



## Digital Strategy, Research & Design

### CHALLENGE

Motivate people suffering from addiction to seek treatment and provide guidance for their loved ones:

- Build trust and engagement in a highly sensitive healthcare area
- Create brand preference and differentiation
- Lead redesign of websites with poor usability; penalized by Google

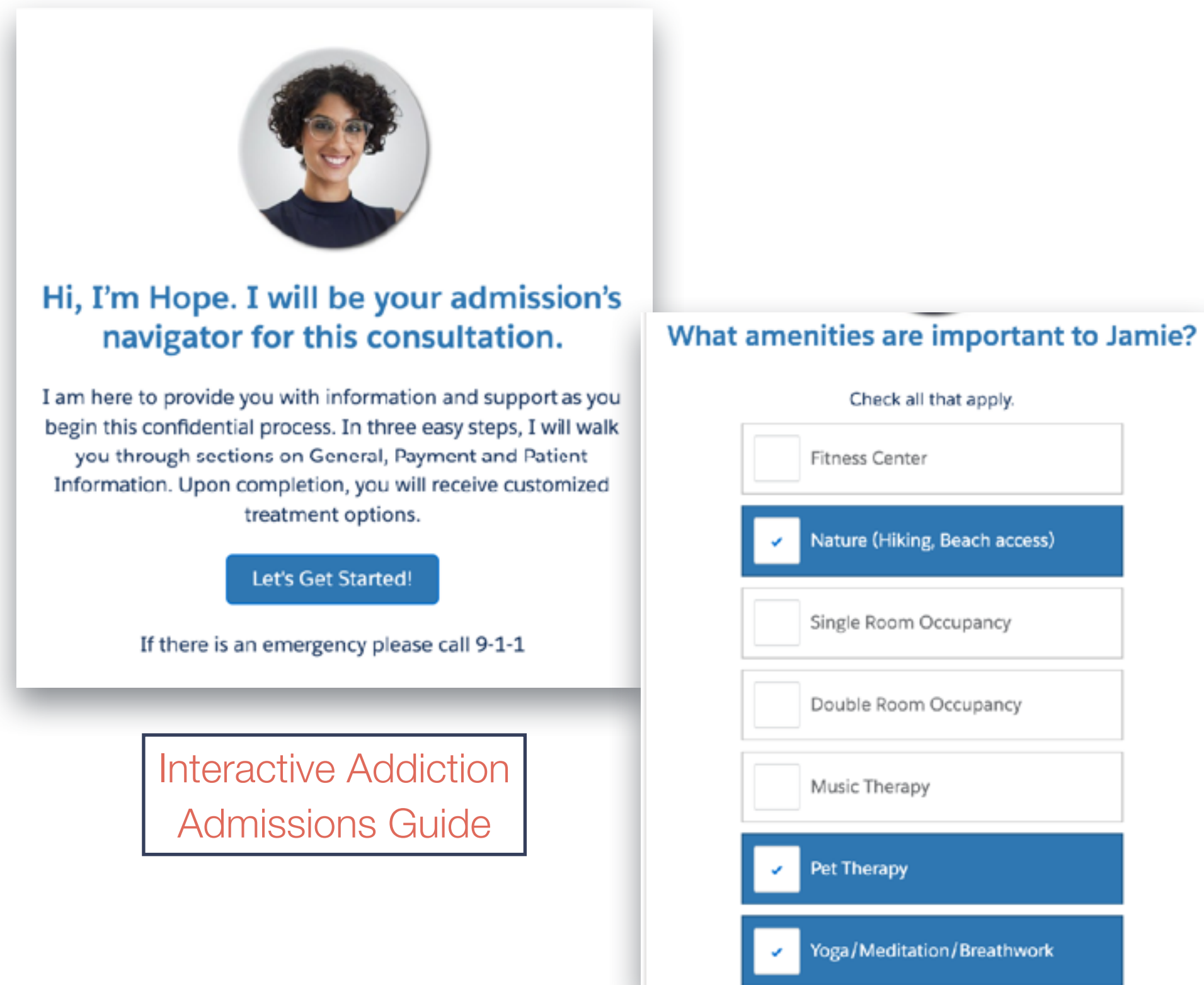
### DISCOVERY & SCOPE OF ENGAGEMENT

- Build an in-house user experience team; lead digital agencies
- Ethnographic research; qualitative and quantitative data analysis
- Develop personas based on addiction, lifestyle, and family dynamics
- Redesign portfolio of websites — 10,000+ pages | 100+ locations — including the largest addiction and treatment location directory in the US
- 75+ addictions, co-occurring disorders, and treatments
- Oversee UX research, design, architecture, and user testing

### RESULTS

- 275% estimated increase in organic search engine traffic
- Removal of Google penalties — increasing keyword rankings
- 20% estimated increase in prospects seeking treatment and loved ones seeking guidance on their behalf

# Life-Changing, Real-Time Answers



**Hi, I'm Hope. I will be your admission's navigator for this consultation.**

I am here to provide you with information and support as you begin this confidential process. In three easy steps, I will walk you through sections on General, Payment and Patient Information. Upon completion, you will receive customized treatment options.

**Let's Get Started!**

If there is an emergency please call 9-1-1

**What amenities are important to Jamie?**

Check all that apply.

- ☐ Fitness Center
- ☒ Nature (Hiking, Beach access)
- ☐ Single Room Occupancy
- ☐ Double Room Occupancy
- ☐ Music Therapy
- ☒ Pet Therapy
- ☒ Yoga / Meditation / Breathwork

Interactive Addiction  
Admissions Guide

## Discovering Sales Lead Solutions Via Design Thinking

### CHALLENGE

People suffering from addiction — and their loved ones — are often uncomfortable sharing their story with a ‘stranger’ and seeking help for treatment.

Discover ways to provide tailored, confidential, real-time information, treatment options, and onboarding assistance online.

### DISCOVERY

Design Thinking Process & Ethnographic Research:

- Call Center Shadowing and Listening
- Interviews with Call Center & Healthcare Employees
- Onsite Observation Patient & Staff Visits at Multiple Locations
- Brainstorm Workshops with Key Stakeholders
- Create Personas with Qualitative & Quantitative Data

### SCOPE OF ENGAGEMENT

- Co-Led Discovery with Product Channel Owners
  - Directed Concept Testing & Prototyping of Solutions
  - Managed Information Architecture, Design, Content & Usability Testing
- continued ...



## Self-Assessment: Am I Addicted?

0/11 Questions

1. Do you often use drugs or alcohol in larger amounts or over a longer period of time than you intended?

☐ Yes ☐ No

2. Have you ever tried to cut back on your use of drugs or alcohol, but couldn't?

☐ Yes ☐ No

3. Do you sometimes find yourself using drugs or alcohol more often than you intended?

☐ Yes ☐ No

### Your score for this quiz was 8

According to your answers, you may already meet 8 of the criteria for substance use disorder. The DSM-5 provides thresholds for substance use severity based on the number of criteria met within a 12-month period:

- Mild: Presence of 2-3 symptoms.
- Moderate: Presence of 4-5 symptoms.
- Severe: Presence of 6 or more symptoms.

You may already be experiencing issues related to compulsive Alcohol use and may benefit from speaking more about this possibility with a doctor or other healthcare provider.

Call (888) 483-2860

Helpline Information

## See if You're Covered

With a few details, we are able to connect with insurance providers across the country to instantly provide you with your coverage information.

\* These fields are required

Find Insurance Carrier \* Aetna

Type To Search

First Name \* John

Last Name \* Smith

### Addiction Risk Assessment & Insurance Coverage Lead Generators

## SOLUTIONS

- Create a first-to-market, interactive addiction admissions guide incorporating:
  - ▶ Addiction Type
  - ▶ Co-Occurring Disorders
  - ▶ Recreation & Environment Preferences
  - ▶ Facility Capacity
  - ▶ Insurance Coverage
- Design multiple online addiction risk assessments based on substance and persona.
- Launch redesigned online instant health insurance verification based on addiction type and coverage.

## RESULTS

- Overall, a 3X estimated increase in qualified lead generation across digital channels
- 18% estimated decrease in call volume for people using the interactive placement guide
- 22% estimated increase in online insurance verifications

# Nemours Children's Health

Director, Digital + Video Marketing

► Digital Experience + Innovation Leader

Largest Pediatric Healthcare + Research System in the US:

80+ Primary, Specialty, Urgent + Hospital Locations



# Establishing Trust, Empathy & Expertise



Redesign:  
Create Simplicity From Complexity

## CHALLENGE

Design a patient acquisition channel for a pediatric healthcare system offering services that vary by location.

- Introduce prospective families to Nemours
- Differentiate Nemours from the competition
- Motivate and persuade families to make an appointment
- Create distinct patient acquisition experiences for parents and healthcare professionals

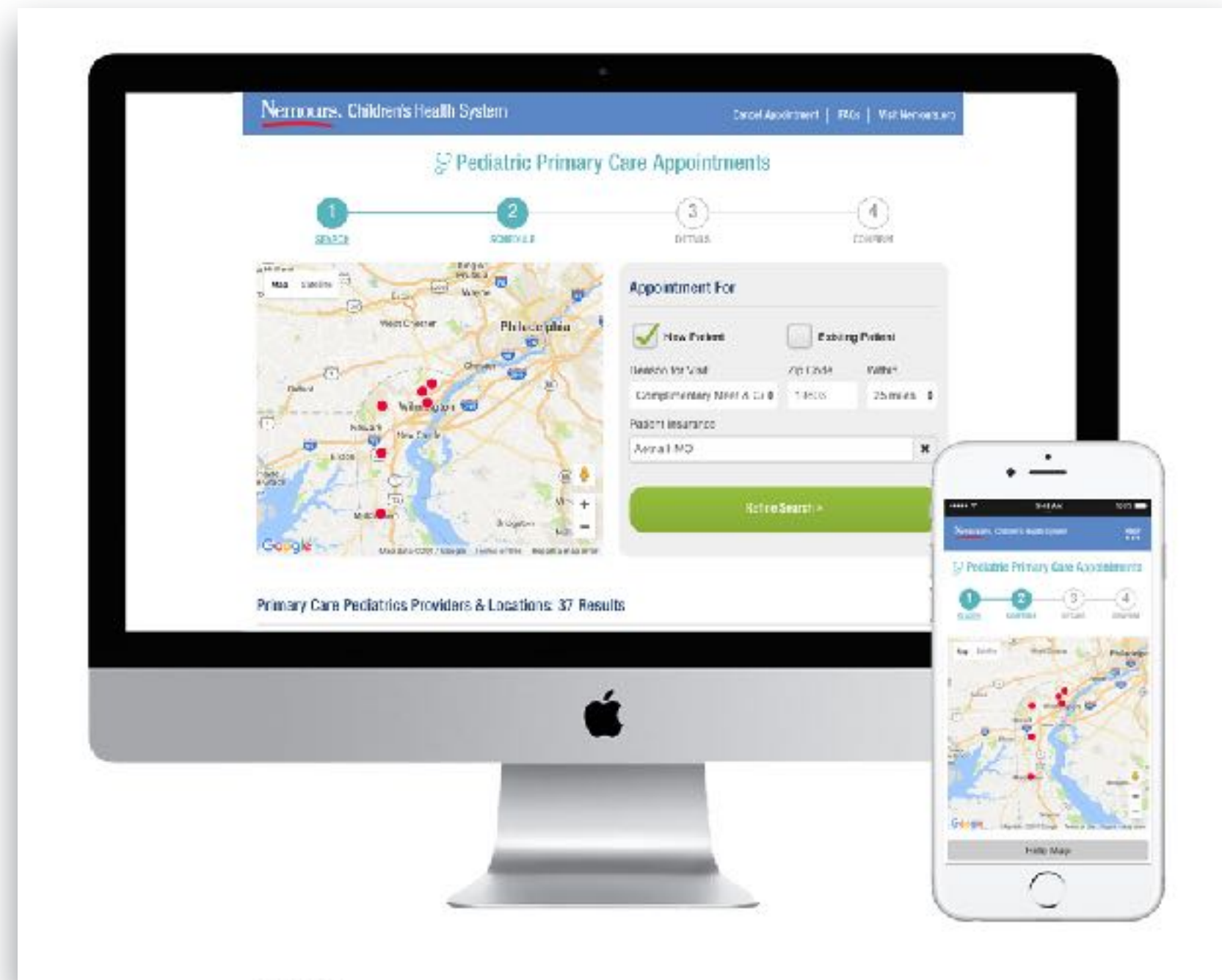
## SCOPE

- 5,000+ pages
- 1,100+ medical provider profiles
- 250+ medical conditions & services
- 100+ clinical trials
- 80+ locations

## RESULTS

- 125% average increase in organic search traffic
- 28% average increase in usability testing scores
- 11% increase in 'likelihood to schedule appointment' ratings

## Brand Differentiation Via Product Innovation



First-To-Market:  
Real-Time, Medical Appointments

### CHALLENGE

Provide families with the ability to make real-time appointments 24/7/365

- Offer scheduling on weekends and evenings without staffing
- Differentiate the appointment experience from competitors
- Reduce appointment call volumes and on-hold abandonments
- Simplify the complex appointment process

### SCOPE

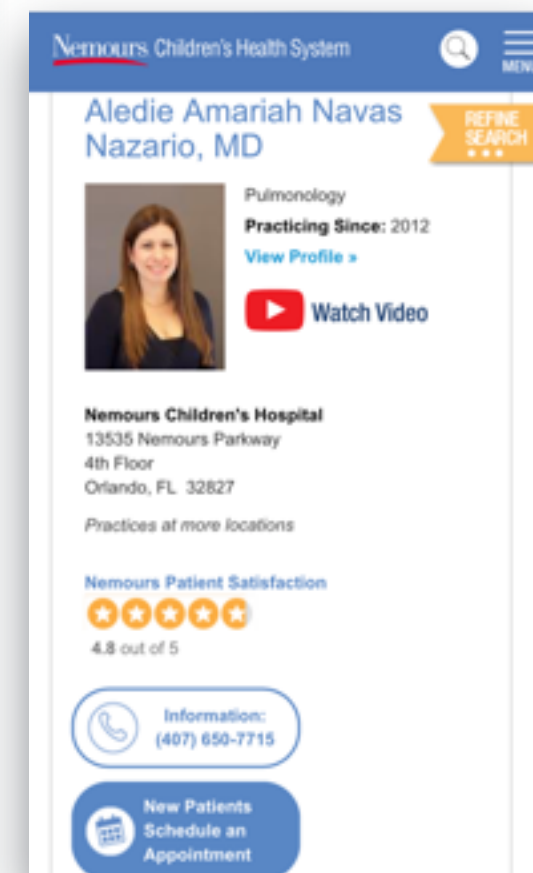
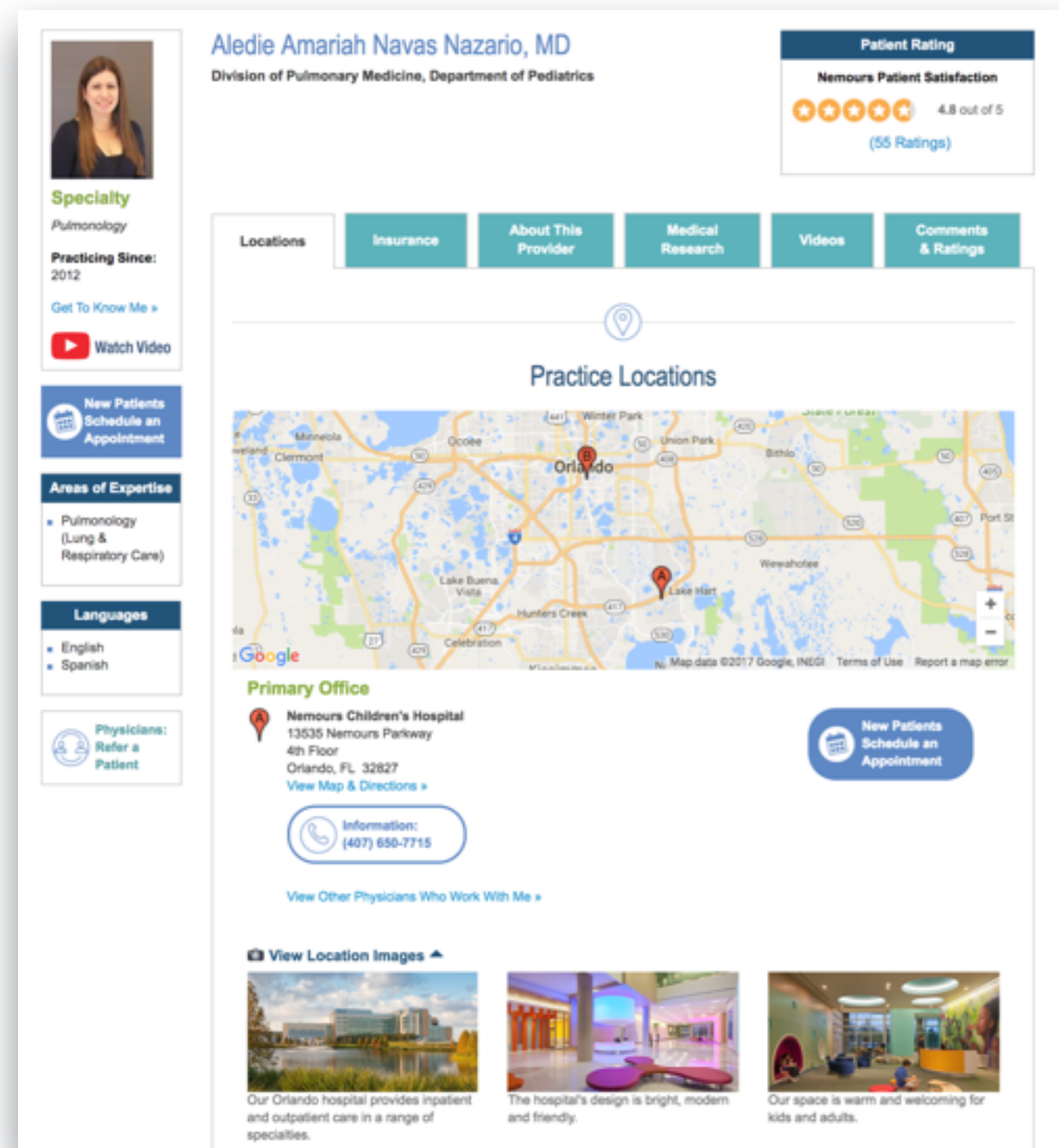
- 1,100+ doctors, nurse practitioners, and physician assistants
- Different scheduling procedures for each location
- Thousands of varying visit types to match
- Hundreds of insurance providers and policies to verify
- 300+ medical conditions, treatments, and services

### RESULTS

- 33% conversion rate
- 52% of appointments are made during evenings and weekends
- Drastically reduced number of visit-type selections
- Standardized insurance verification and scheduling across locations
- First healthcare system to provide real-time online appointments



# Designing Best-In-Class Product



## Find a Doctor Search Directory Redesign

### CHALLENGE

- Help families select a doctor in times of need
- Build trust and familiarity
- Preview the style of care and bedside manner
- See what other families have to say about their experience
- Provide the ability to compare doctors in the exact location and specialty
- Create competitive differentiation and drive acquisition
- Overcome physician concerns about sharing negative comments

### SCOPE

- 1,100+ doctors and providers across 80+ locations
- Integrate satisfaction scores and ratings
- Photo shoots across 60 locations to showcase amenities
- Create 'Get to Know Me' editorial and video profiles
- Develop a comment review and appeal process for doctors
- Extensive Voice of Customer research and user testing
- Merge, translate, and display data from 10 disparate systems

### RESULTS

- First pediatric system to launch satisfaction scores and reviews
- 125%+ increase in organic search engine traffic
- Substantial increases in task performance usability scores

# Tailoring Digital Experiences for Different Audiences



## Launching New Brand With a Complex Story & Business Model

### CHALLENGE

Create brand awareness for an organization offering different medical services and treatments in each geographic market.

- Help families find local care while showcasing breadth
- Differentiate from better-known competitors
- Improve usability task performance
- Engage diverse audiences with specific needs

### SCOPE

- Dedicated digital areas for eight diverse audiences
- Extensive photo, video, and commercial shoots
- Creation of 4 new specialized onsite searches
- Develop new medical service templates — creating a unified brand experience with location-specific content.

### RESULTS

- Surge in local search engine rankings and traffic
- 22% average increase in 'Likelihood to Make An Appointment,' 'Trust,' and 'Understanding of Nemours' ratings
- 46% average increase in 'Find a Doctor' and appointment task performance scores



# “Let's Move” Campaign For First Lady Michelle Obama



Influencing Healthier Habits for Life

## CHALLENGE

Design a new website for First Lady Michelle Obama in 30 days for national campaign launch:

- Educate child care providers about obesity prevention
- Motivate providers to commit to nutrition and exercise goals
- Persuade providers to register and complete multiple online certification courses

## SCOPE

- Collaborate with the Centers for Disease Control (CDC), the White House, and the Nemours Child Advocacy teams
- Design a 50-page website with more than 150 resources
- Lead teams in architecting, coding, designing, writing, editing, and testing while supporting other digital initiatives

## RESULTS

- 1,800+ child care providers registered
- 1,100+ providers completed all 5 goals for certification
- Led to fitness and nutrition improvements for 1.2M children
- Enabled Nemours to receive \$25M to expand the program



## Product Re-Invention



## Tailoring for New Business Need

### CHALLENGE

Create a way for parents of pre-schoolers to access the reading curriculum.

initially created for teachers, as an early reading intervention tool:

- Position Nemours as a leader in children's preventative health
- Create a consumer-friendly online version of the program
- Design with the ability to add corporate sponsorships in the future
- Balance differences in cultures and reading abilities

### SCOPE

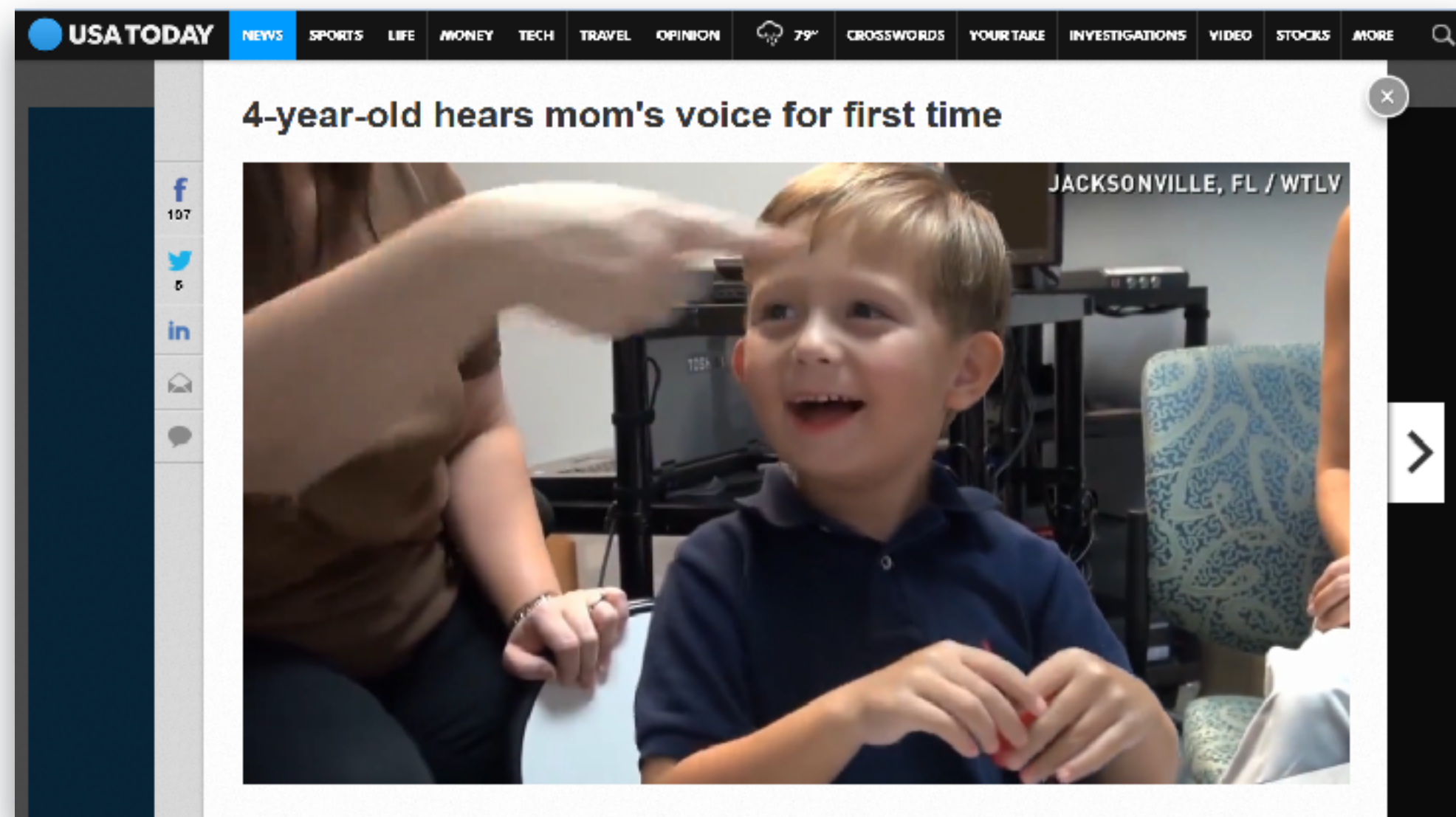
- Online assessment with customized action plans
- Extensive consumer market research and usability testing
- Automate the post-visit marketing program
- Customize resources for 8 different age groups
- Product marketing and orientation videos

### RESULTS

- Exceptional concept testing and usability ratings
- Research revealed that sponsorship design added credibility
- More than 14,000 assessments completed
- Product positioned as a unique selling proposition for the organization's primary care pediatric business



# Illustrating Life-Changing Impacts to Create Lasting Emotional Connections



## Sharing Compassion & Expertise Via Video

### CHALLENGE

- Comfort families while illustrating expertise and differentiation
- Introduce families to care providers and build trust
- Prepare families on what to expect during their visit
- Create an emotional connection to unknown places and people
- Find ways to repurpose videos for multiple needs
- Scale without sacrificing quality with a limited budget

### SCOPE

- Build in-house, freelance, and boutique agency video capabilities
- Create an editing and distribution strategy to maximize impact
- Launch initiative to create 500+ 'Get to Know Me' doctor videos

### RESULTS

- More than 100 videos were produced each year
- 3-4 videos produced from each day of filming:
  - ▶ 'Get to Know Me' doctor videos
  - ▶ 'Answers to Grown On' for social media
  - ▶ 'Why Choose Us' for specific medical care
  - ▶ Video News Release for publicity, resulting in national coverage
- Doctors report families are choosing them based on their videos



## Product Re-Imagination



## Redesigning Adult Telemedicine Product for Pediatrics

### CHALLENGE

- Provide 24/7 on-demand care and consults for children from their home
- Brand and describe a new technology product
- Redesign the third-party platform originally created for adults
- Persuade parents to pay for service not covered by insurance
- Motivate new patient-families to use the service
- Explain what symptoms the product could be used to diagnose

### SCOPE

- Develop visual brand identity, description, pricing, and positioning
- Conduct extensive customer insights research and usability testing
- Collaborate with a third-party SaaS vendor on extensive product changes
- Design to incorporate medical monitoring devices
- Leverage Voice of Customer insight to improve the product:
  - ▶ Ability to see more than one child in a single visit
  - ▶ Invite another parent or caregiver to video chat

### RESULTS

- First pediatric healthcare system to launch product in multiple states
- High satisfaction scores from users
- First 90 days: Average 4.6-star rating on Apple; 4.1-star rating on Google
- Product is also now used for follow-up visits and chronic condition care

## Citibank | Citigroup

VP, Global Customer Insights + Research

► Customer Experience | Global Internet + Mobile

Fortune 100 | 150 M+ Customers

Consumer, Small Business, Commercial + Institutional Financial Services Organization



# Building Organizational Trust via Customer Insights & Research Services

## MISSION

Provide actionable, comprehensive and unbiased data to help make business and customer-centric decisions.

Collaborate to define research strategies which address business and customer needs.

Deliver ongoing guidance, education, reporting and support to our partners.

## WHAT WE OFFER

### Customer Satisfaction Insight

What our customers want vs. our ability to meet those needs

### Concept Testing

How do we determine need and best ways to position new offerings?

### Ethnographic Research

Who are our customers and what are their needs?

### Audience Measurement, Competitor Intelligence & Market Share Data

What impact are we having?

### Usability Testing

How do our customers accomplish tasks online?

## CHALLENGE

Provide senior leaders, product managers, and digital channel owners with insights and prioritization to:

- Increase Acquisitions
- Reduce Attrition
- Decrease Call Volumes
- Strengthen Loyalty
- Improve Cross-Selling

## SCOPE

Expand capabilities across global digital acquisition and servicing channels — including:

- Consumer Banking, Mortgages, Lending, and Credit Cards
- Commercial Banking
- Institutional Trading and Securities

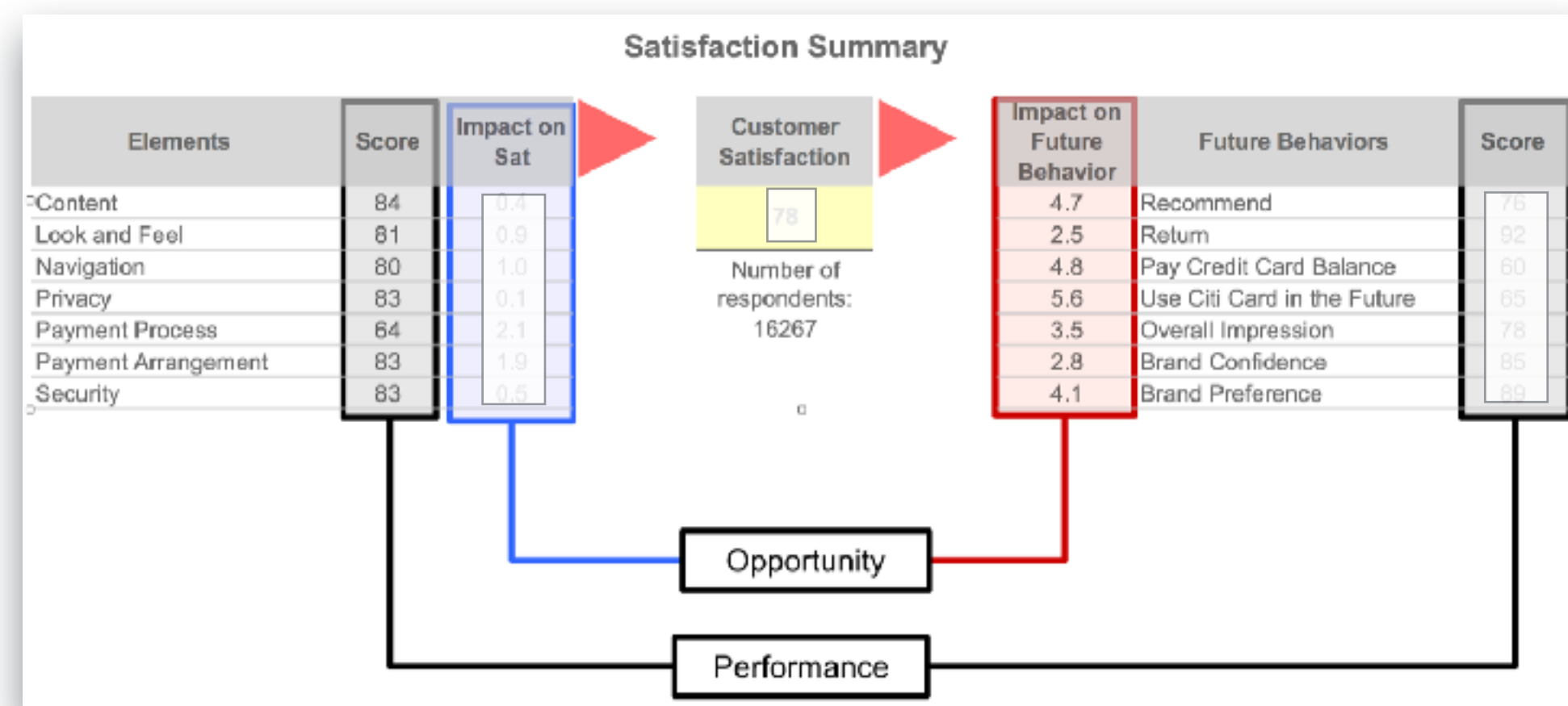
## RESULTS

Based on the success of the US credit card program, I was asked to lead expansion across all North America products, followed by a global rollout

## Using Data to Influence Decisions

# Prioritizing ROI

## Using Science-Based Methodology



## Measuring Customer Satisfaction & Illustrating Impact on Business

### CHALLENGE

Establish a scientifically proven customer satisfaction measurement — with the ability to determine changes with the greatest impact:

- Comparability across business lines and regions
- Tailor questions, analysis, and reporting to local regions
- Create consistent reporting across the enterprise
- Provide stakeholders with on-demand tools and reporting

### SCOPE

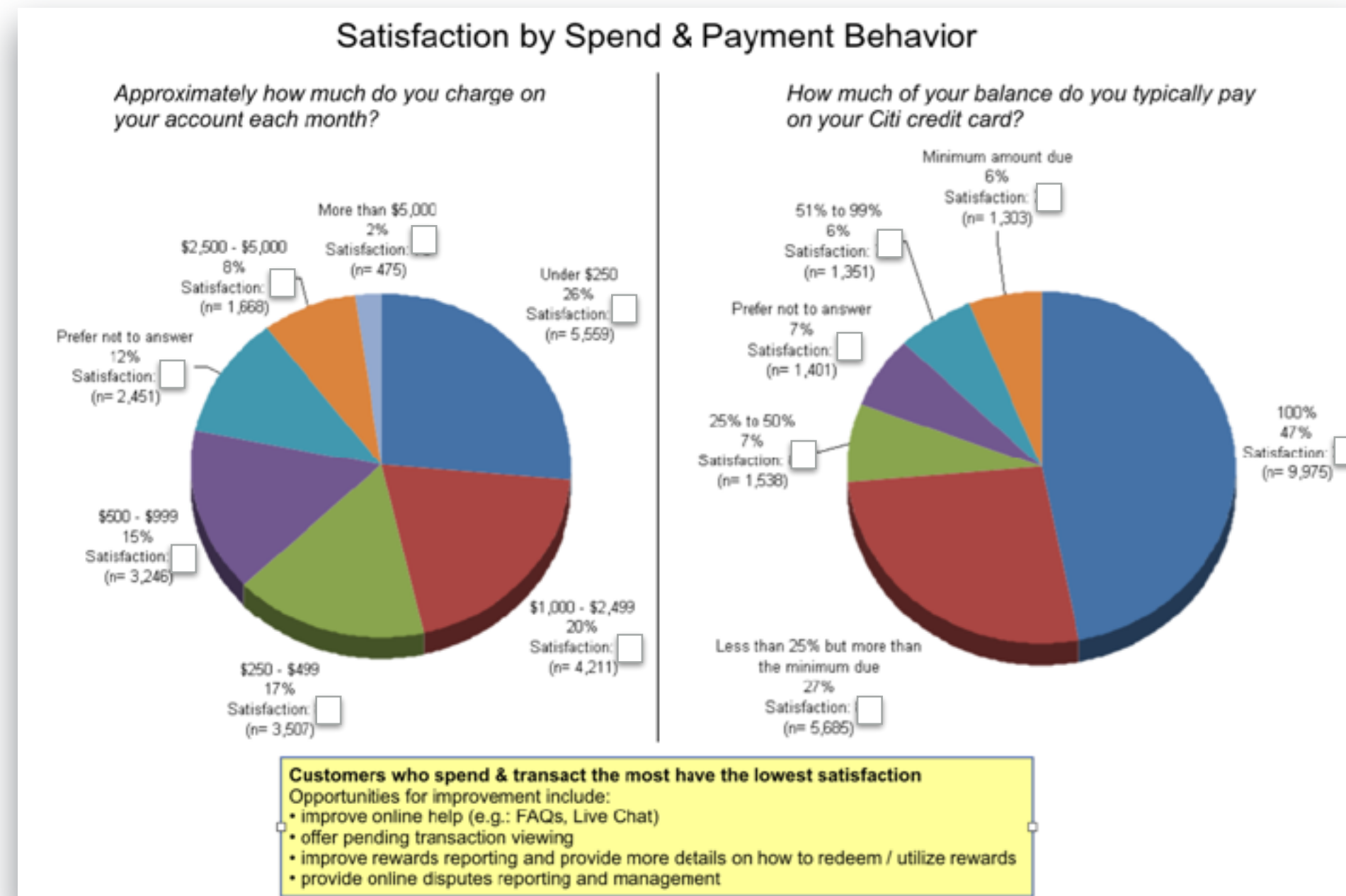
- Comprehensive internal marketing and training campaign
- Evaluation of multiple methodologies and vendors
- Expansion to all global digital channels

### RESULTS

- Voluntary adoption across most regions within 18 months
- Led to substantial improvements to digital experiences worldwide
- Able to validate the impact of satisfaction on business results



# Delivering Actionable Insights



## Comparing Satisfaction of Customers Segmented by Business Value

### CHALLENGE

Deliver actionable insights to drive key business metrics:

- Offer guidance on where to start focusing efforts
- Prioritize business needs with customer needs
- Determine what changes have the greatest impact

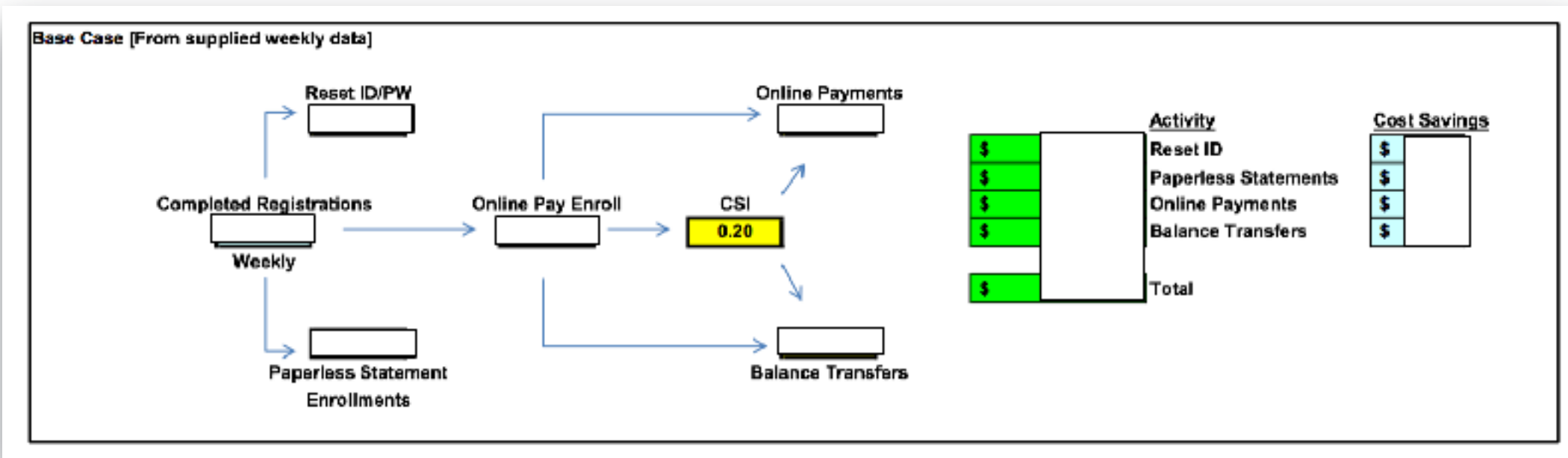
### SCOPE

- Collaborate with regional teams to tailor measurements to:
  - ▶ Highest value customers
  - ▶ Local market business priorities
- Create automated reporting complemented by analyst research

### RESULTS

- Generated high demand for service, with an 18-month global rollout
- Improved profitability of high-value customers
- 8% call volume reduction in North America due to improved self-service capabilities

# Measuring Financial Impact of Customer Satisfaction



Improving success rate of Account Online registration by 50%  
increases overall satisfaction by 5 points =  
Cost Savings of \$XXX,XXX,XXX Annually

## Create Model To Measure ROI of Digital Experience Satisfaction

### CHALLENGE

Determine if improving the digital experience customer satisfaction had a measurable financial impact:

- Create a model that didn't previously exist
- Determine what to measure
- No pre-defined path to success
- Costs of services initially unknown

### SCOPE

- Led collaboration with finance team and product owners — partnering with ForeSee Results (acquired by Verint) research team to prototype and test models
- Leverage the University of Michigan's research-validated methodology
- Research the internal costs of services

### RESULTS

- Created a model that prompted Citi to redesign, simplify, and integrate its account registration process across North America
- Catalyst to create dedicated teams to focus on improving the experience of key servicing functions
- Established credibility of customer satisfaction measurement



# Concept Testing



## Tailoring Specific Value Propositions To Customer Needs

### CHALLENGE

Help product owners understand emotional barriers to cross-selling:

- Develop personas for products
- Deliver product insight based on psychological needs
- Incorporate attitudinal data into segmentation models
- Create a methodology for unbiased testing
- Connect emotional needs to usability abilities

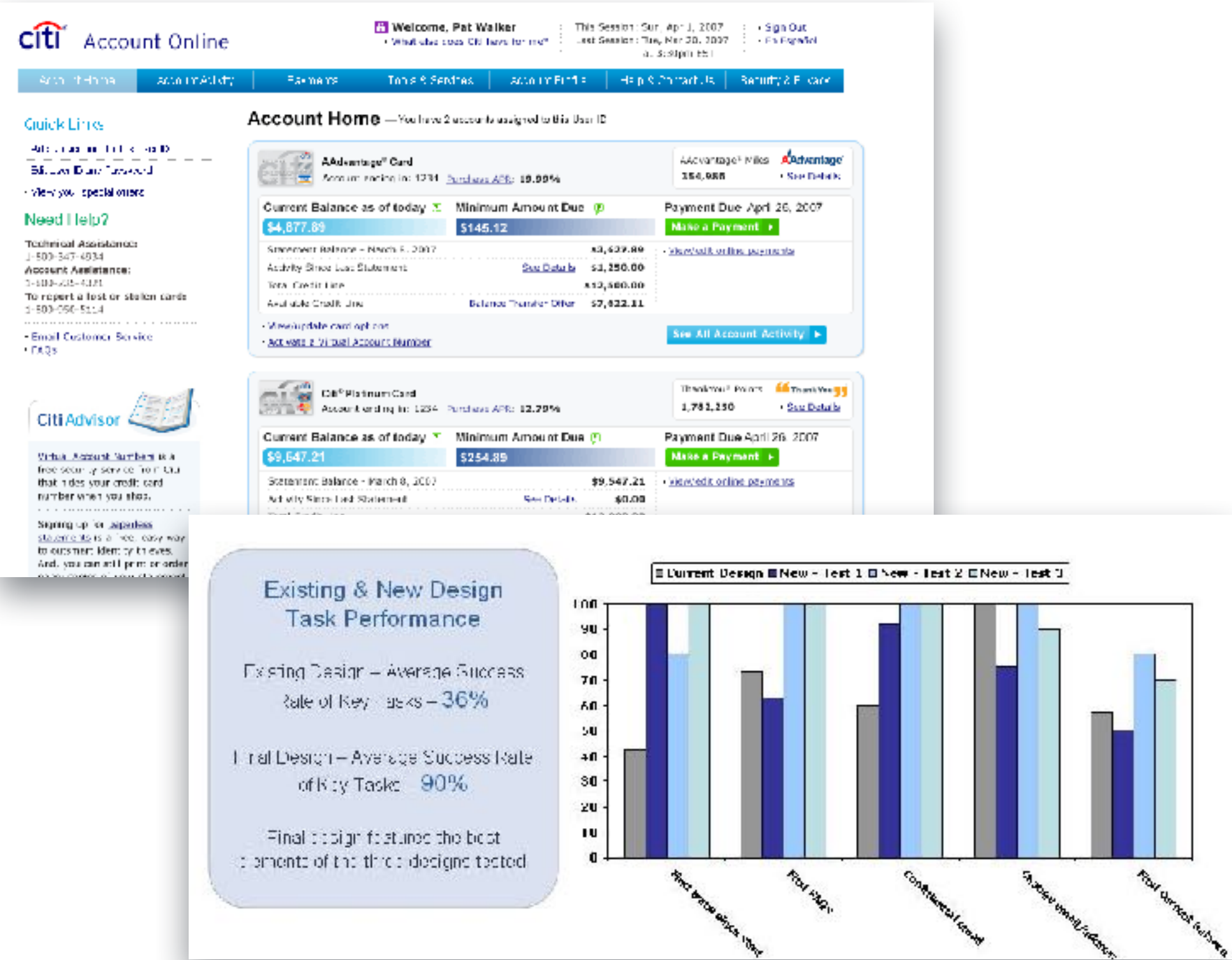
### SCOPE

- Establish a concept testing framework for all of North America's financial service digital products

### RESULTS

- Created the ability to acquire more customers and sell more products via Voice of Customer insights
- Launched more persuasive products and value propositions that generated additional revenues and cost savings

# Prototyping & Usability Testing



## Improving Online Servicing Experience

### CHALLENGE

Redesign the online credit card account servicing portal to:

- Improve understanding of the information presented
- Enable customers to manage multiple accounts in one portal
- Decrease call volume for servicing needs
- Increase key task completion rates
- Improve product cross-selling

### SCOPE

- Influence designs that could be applied to all consumer, business, brand, co-brand, and private label credit cards
- Establish a rapid prototyping and testing system with multiple product owners, legal, design, architecture, and content teams.

### RESULTS

- Improved average task success rate from 36% to 90%
- Revenue-generating transactions increased 403% YOY
- Cost-saving transactions increased 618% YOY
- Raised understanding of data displayed on dashboard — helping reduce account servicing call volume by 8%



# Creating Personas

## Via Ethnographic Research & Business Data



Using Customer Insights to  
Create Better Products

## CHALLENGE

Discover why Citi had low business card adoption and usage:

- Determine financial needs and influences by type of business
- Understand influences on purchasing behaviors
- Uncover why competitor products were preferred
- Figure out what drove payment choices at the point of purchase
- Discover unmet needs and desires for future products

## SCOPE

- Plan ethnographic research studies based on business size, ownership structure, and purchasing influencers; lead agency.
- Observe business owners and decision-makers at work and home, managing their finances, shopping, traveling, and dining

## RESULTS

- Gained insights into business owners' needs, pain points, emotional influences, habits, and goals, based on the lifecycle and size of their company.
- Enabled Citi to improve its existing card products and tailor marketing to specific business personas

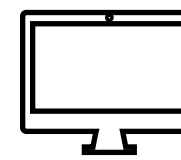
Thank You.  
Let's Collaborate!

CHAUNCEY  
JACK  
DUNLAVEY

CUSTOMER EXPERIENCE LEADER



CJackDunlavey@gmail.com



ChaunceyJackDunlavey.com



904-536-3505



JackDunlavey