

Chauncey Jack Dunlavey

Product Innovation, Customer Insights, Digital Experience & Marketing Strategy Leader

PORTFOLIO

About Me ...



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 — along with 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 . . .

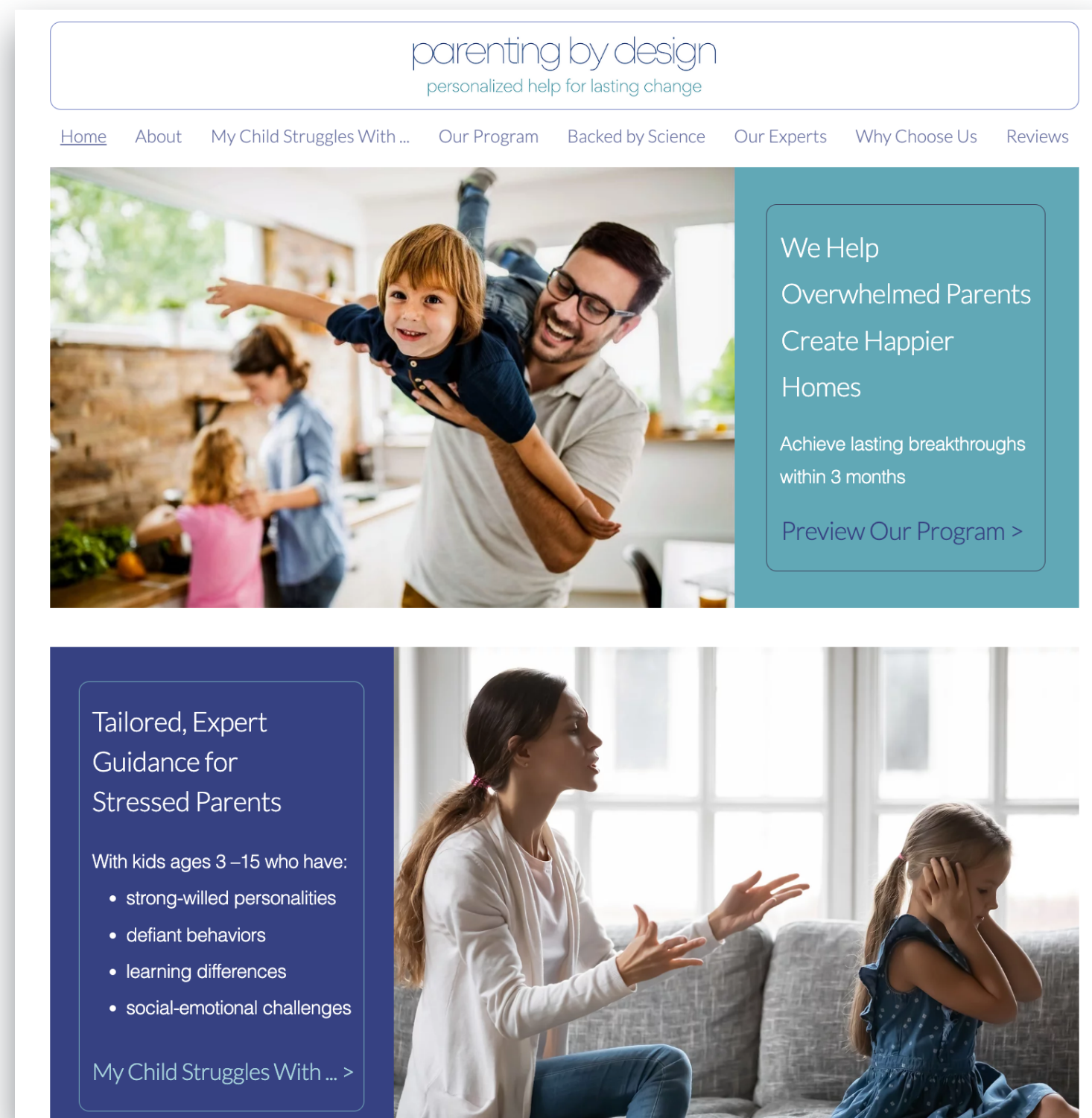
Let's Get to Know Each Other

Experiences by Design: Insights & Innovations Consultancy

Managing Director | Proprietor

Helping organizations create breakthrough products and services
via customer insights, design research and digital innovation

Personalized, Expert Guidance for Overwhelmed Parents



Product & Service Design via Insights: First-to-Market Service

CHALLENGE

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

- Determine depth of unmet needs, audience size and viability
- Design solution with customization and uniformity to scale
- Develop product-market fit without insurance coverage
- Understand 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

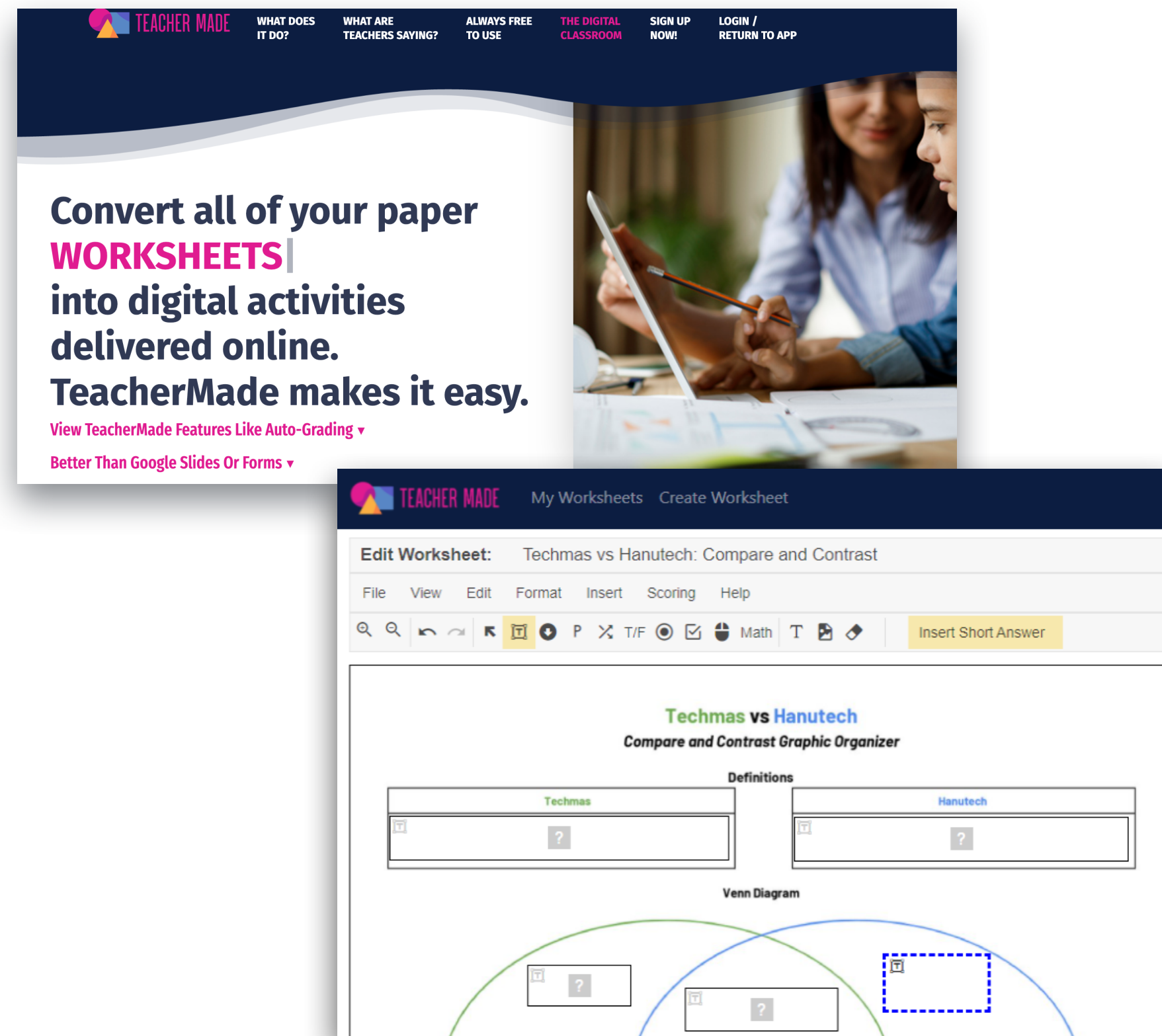
SOLUTIONS

- 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 2024

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 COVID pandemic:

- Research if a new digital product could solve an unmet need
- Create 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 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; similar 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 ability to scan worksheets & convert into editable, interactive activities; with auto-grading and success tracking.

Main Features

- Edit text, embed videos and hyperlinks, re-arrange 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 & Paid Versions

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

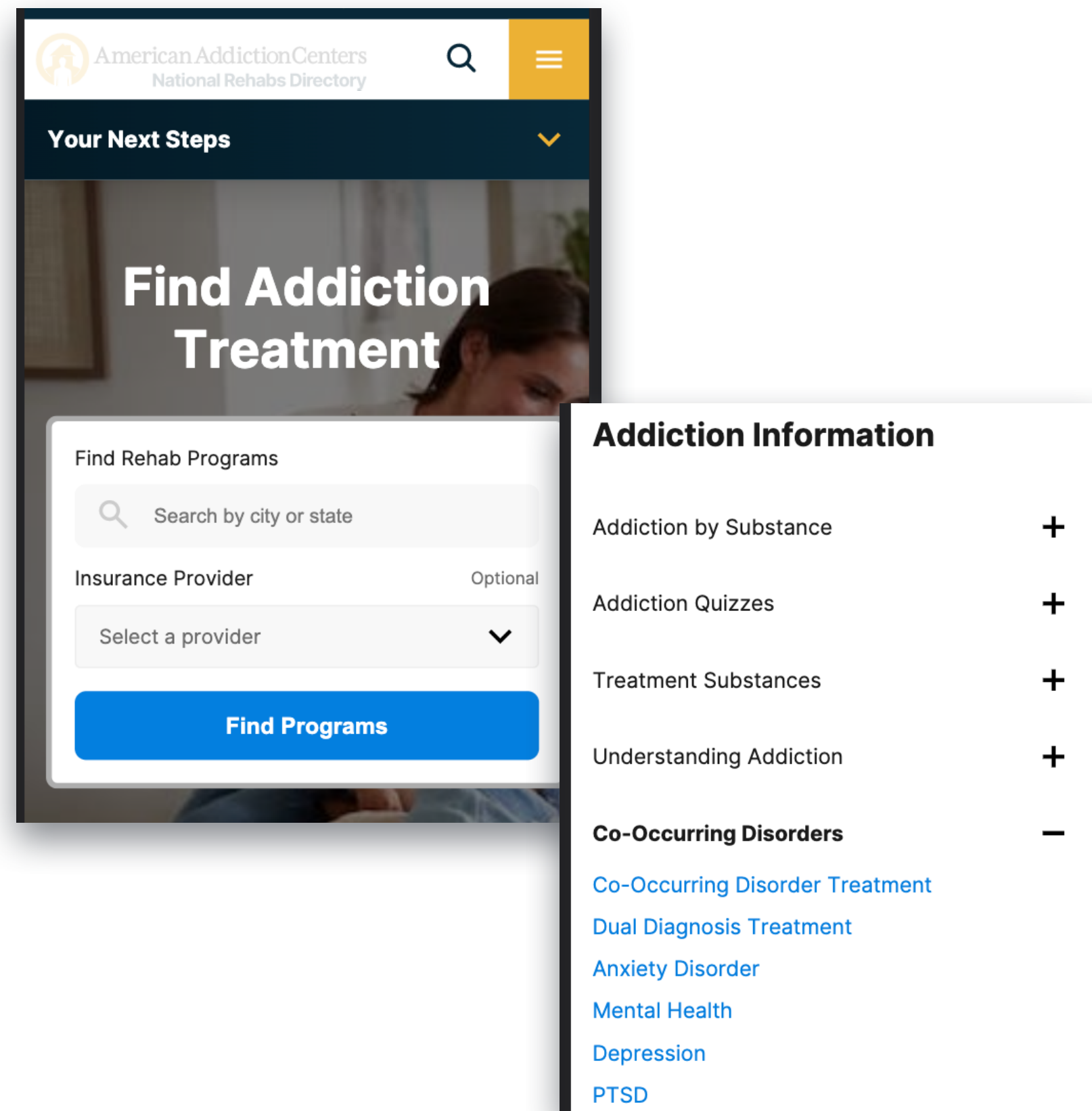
2021-2022 School Year — Paid Versions

- \$900,000 revenue

2023-2024 School Year — Free & Paid Versions

- \$1.8M estimated revenue
- 60,000 registered teachers
- 82M+ total assignments submitted (since 2020)

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 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 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

Interactive Addiction
Admissions Guide

What amenities are important to Jamie?

Check all that apply.

<input type="checkbox"/>	Fitness Center
<input checked="" type="checkbox"/>	Nature (Hiking, Beach access)
<input type="checkbox"/>	Single Room Occupancy
<input type="checkbox"/>	Double Room Occupancy
<input type="checkbox"/>	Music Therapy
<input checked="" type="checkbox"/>	Pet Therapy
<input checked="" type="checkbox"/>	Yoga/Meditation/Breathwork

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-Lead Discovery with Product Channel Owners
- Direct Concept Testing & Prototyping of Solutions
- Manage 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 made unsuccessful attempts?

☐ Yes ☐ No

3. Do you sometimes find that you need to take more drugs or alcohol than you intended to?

☐ 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) 493-2860




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

Q Type To Search

First Name *

John

Last Name *

Smith

Addiction Risk Assessment & Insurance Coverage Lead Generators

SOLUTIONS

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

Nemours Children's Health System

One of the Largest Pediatric Healthcare Organizations:
80+ Primary, Urgent, Specialty & Hospital Locations

Director, Digital & Video Marketing

Co-Leader of Digital Experience & Innovation

Establishing Trust, Empathy & Expertise



Redesign:
Create Simplicity From Complexity

CHALLENGE

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

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

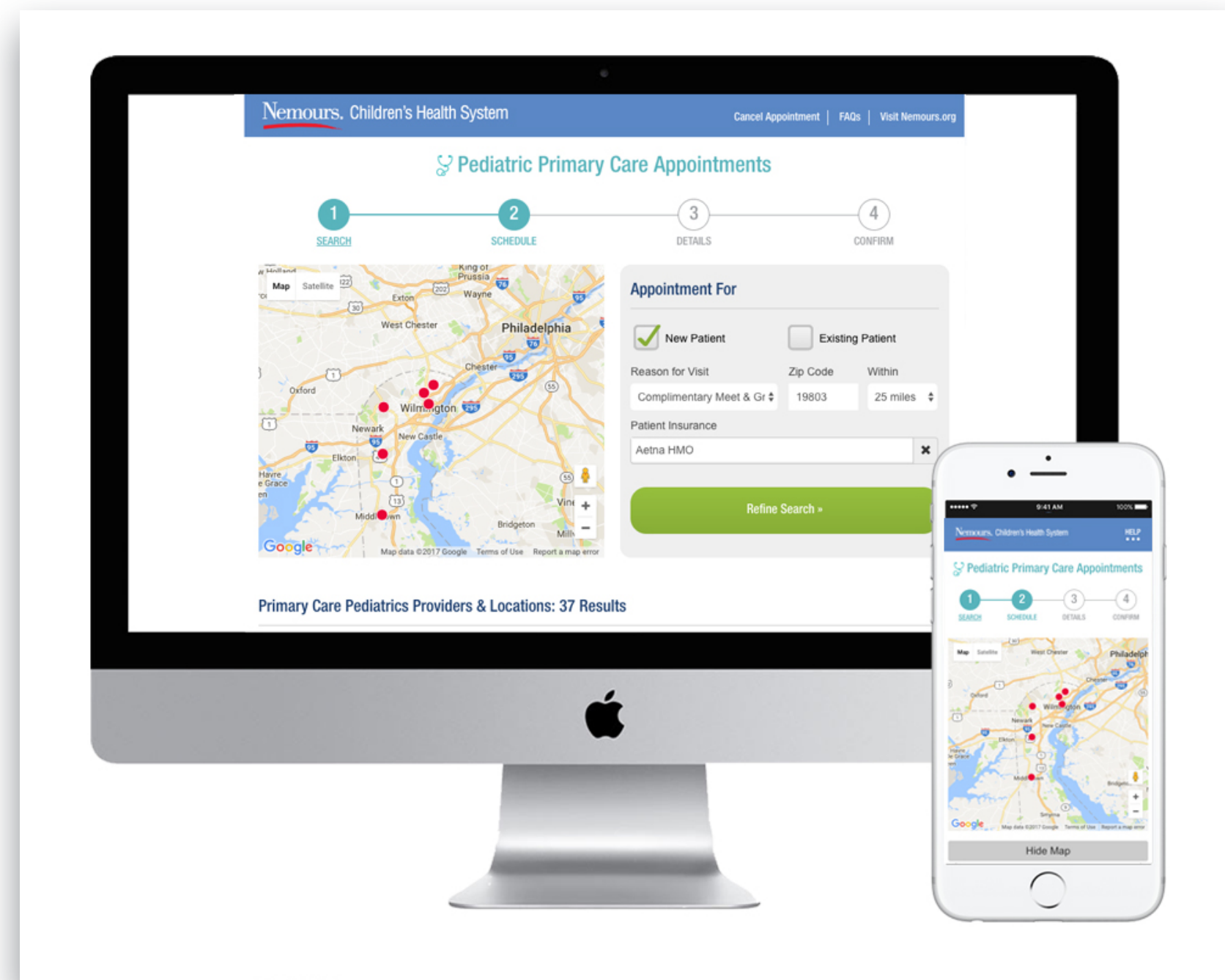
SCOPE

- 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 ability to make real-time appointments 24 x 7 x 365

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

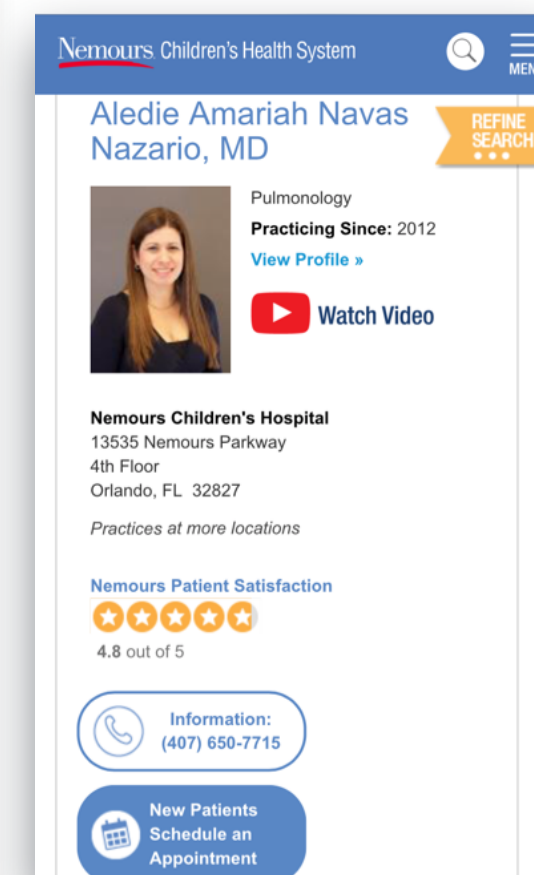
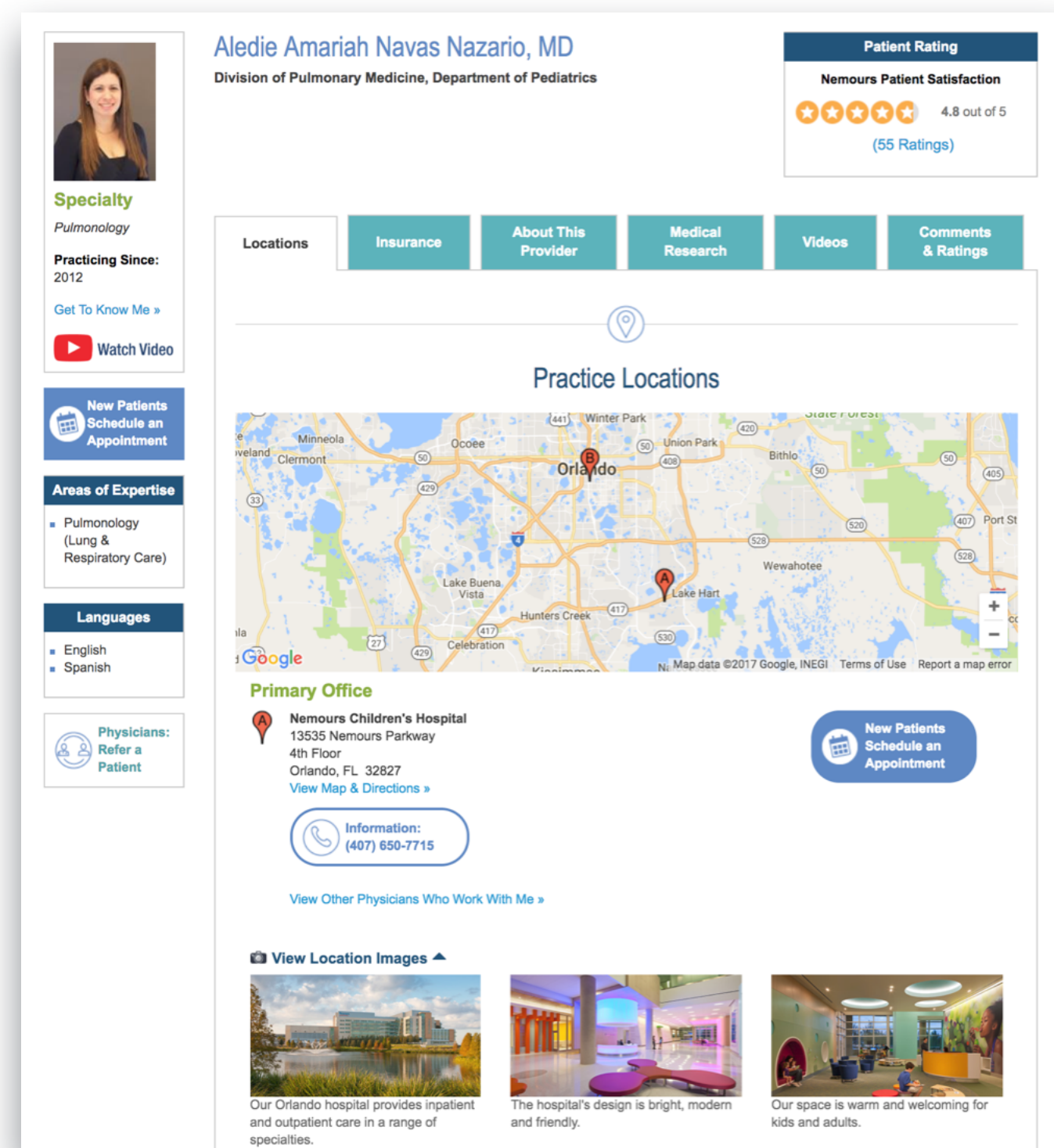
SCOPE

- 1,100+ doctors, nurse practitioners and physician assistants
- Different scheduling procedures for each location
- Thousands of different 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 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 time of need
- Build trust and familiarity
- Preview style of care and bedside manner
- See what other families have to say about their experience
- Provide ability to compare doctors in same location and specialty
- Create competitive differentiation and drive acquisition
- Overcome physician concerns about sharing negative comments

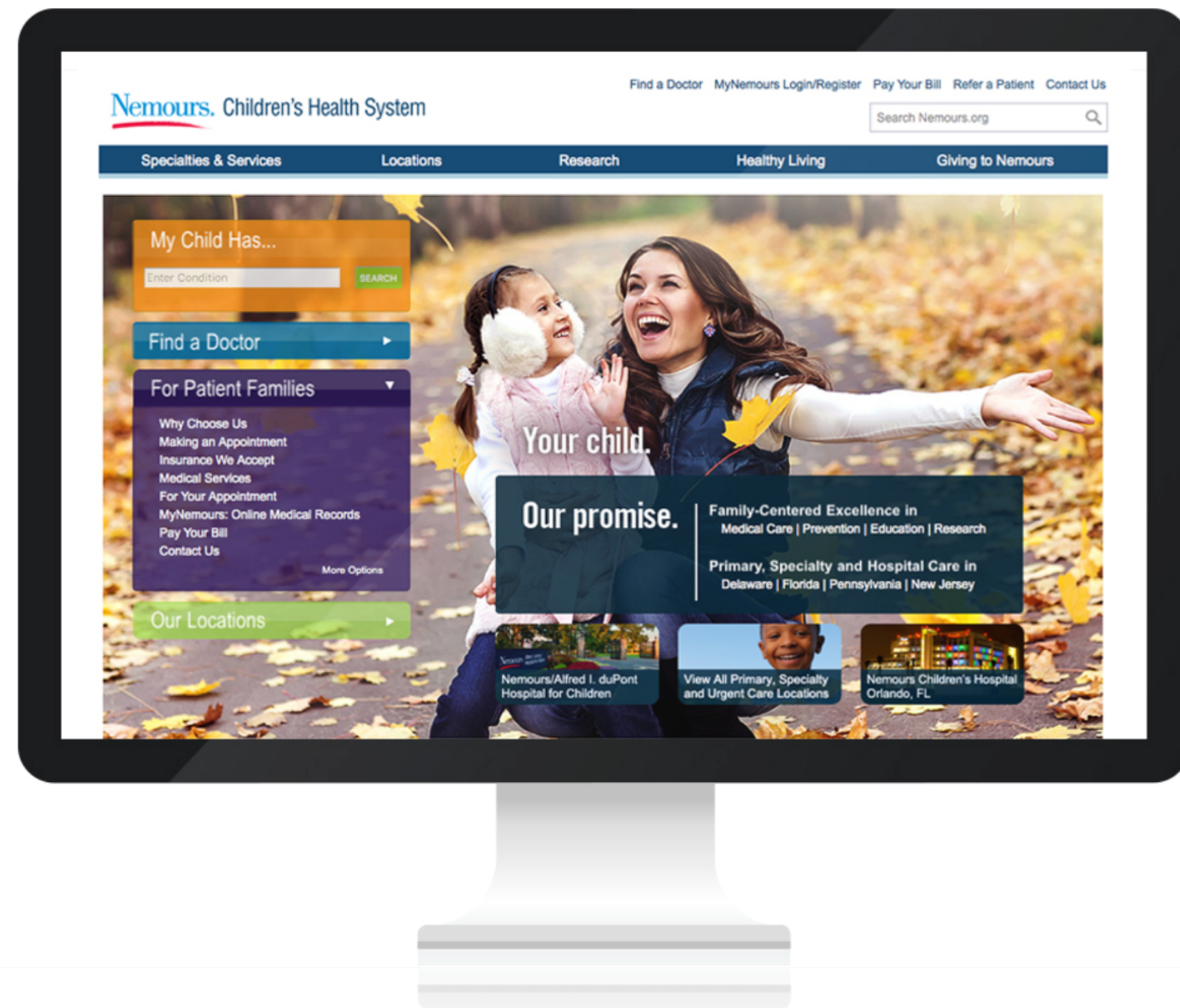
SCOPE

- More than 1100+ doctors and providers across 80+ locations
- Integrate satisfaction scores and ratings
- Photo shoots to across 60 locations to showcase amenities
- Create 'Get to Know Me' editorial and video profiles
- Develop 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 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 8 diverse audiences
- Extensive photo, video and commercial shoots
- Creation of 4 new specialized onsite searches
- Develop new medical service templates — creating 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 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

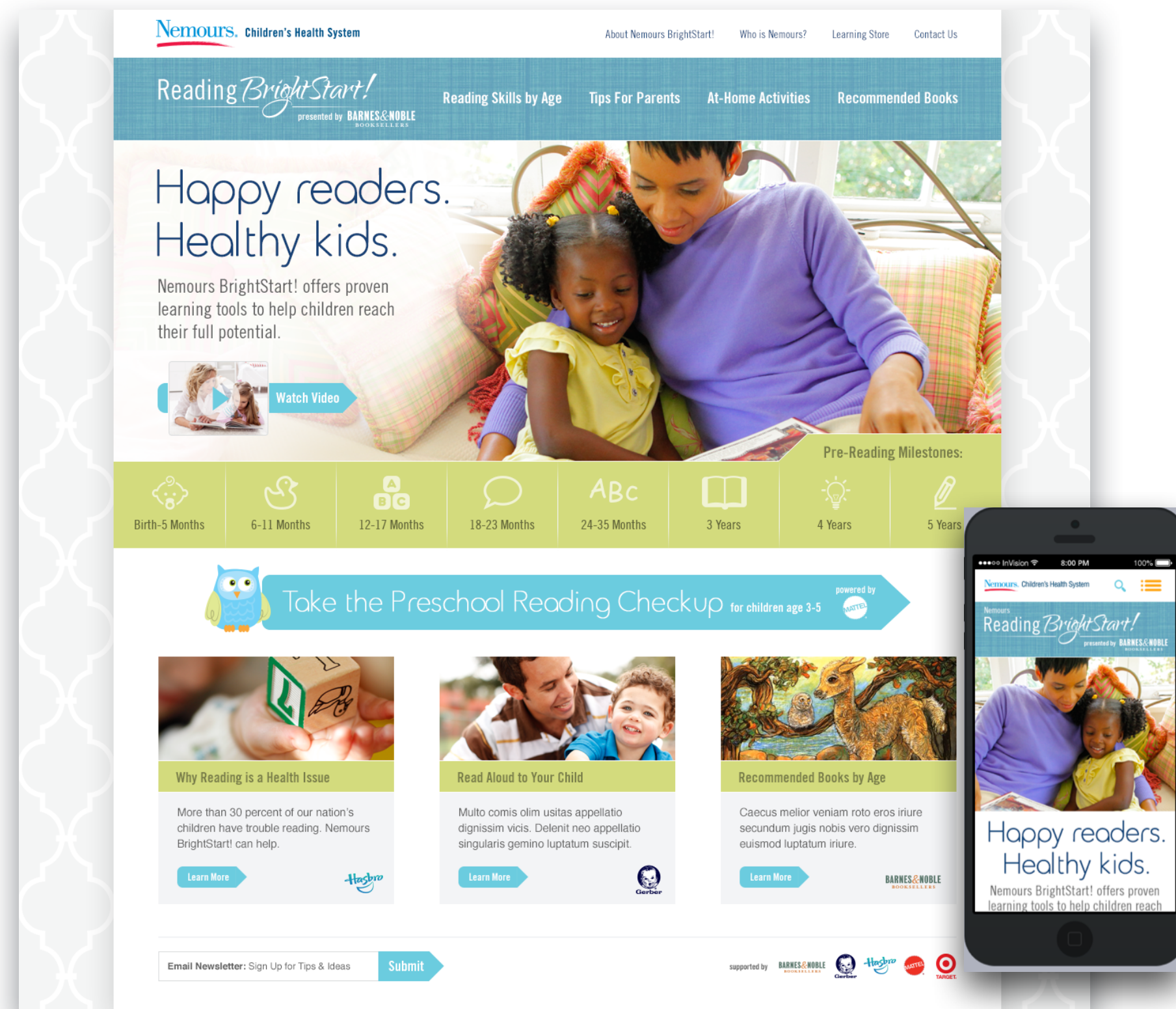
SCOPE

- Collaborate with CDC, White House and Child Advocacy teams
- Design 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 1.2 million children
- Enabled Nemours to receive multiple multi-million dollar, multi-year grants

Product Re-Invention



Tailoring for New Business Need

CHALLENGE

Create a way for parents of pre-schoolers to access reading curriculum originally created for teachers — as an early reading intervention tool:

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

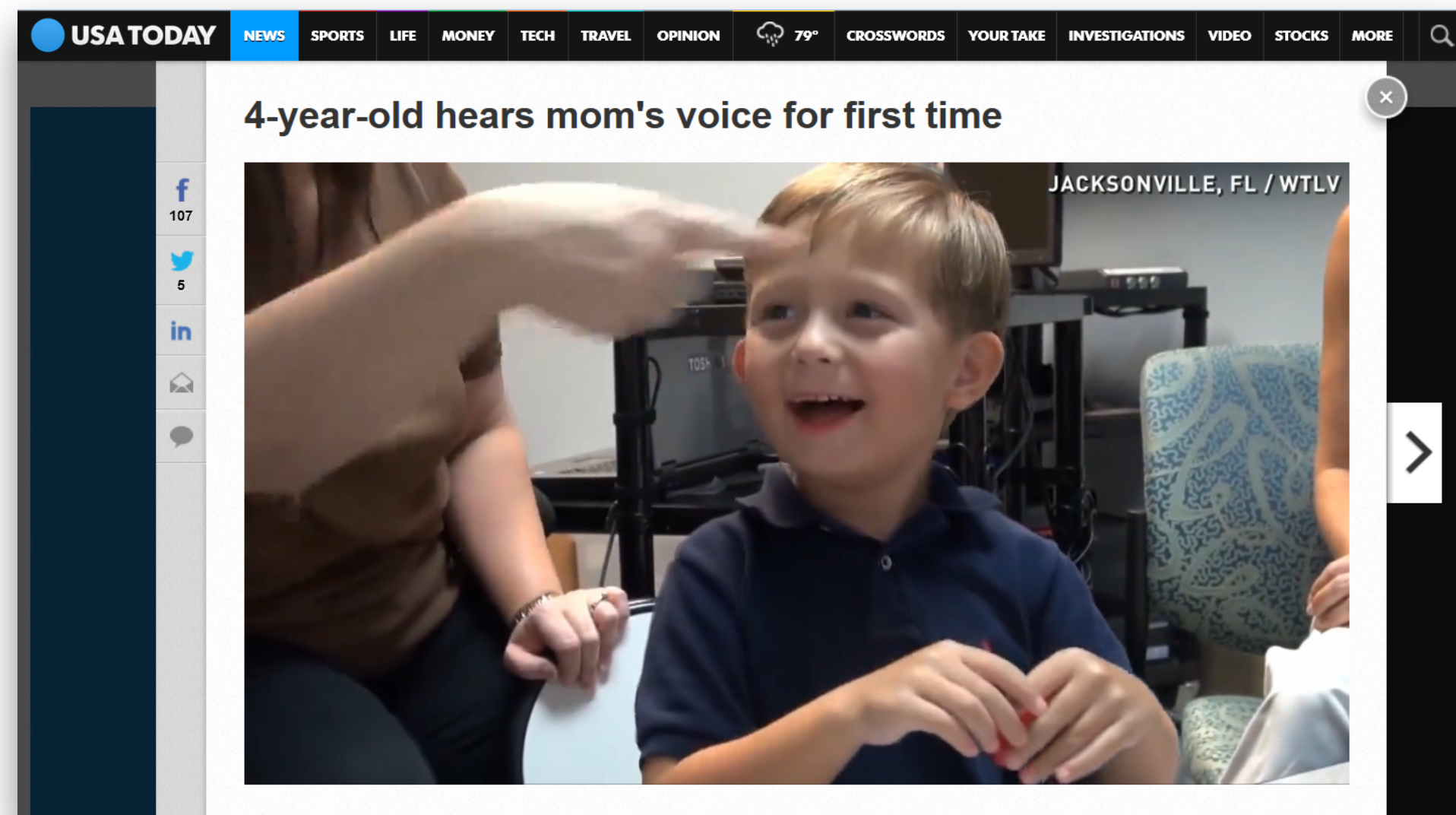
SCOPE

- Online assessment with customized action plans
- Extensive consumer market research and usability testing
- Automate 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 sponsorship design added credibility
- More than 14,000 assessments completed
- Product is now being positioned as unique selling proposition for 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 emotional connection to unknown places and people
- Find ways to re-purpose videos for multiple needs
- Scale without sacrificing quality with limited budget

SCOPE

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

RESULTS

- More than 100 videos 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 medial 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 x 7 on-demand care and consults for children from their home
- Brand and describe new technology product
- Redesign third party platform originally created for adults
- Persuade parents to pay for service not covered by insurance
- Motivate new patient-families to use service
- Explain what symptoms 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 third party SaaS vendor on extensive product changes
- Design to incorporate medical monitoring devices
- Leverage Voice of Customer insight to improve 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
- 5-star rating on Apple App Store and 4-star rating on Google Play
- Product also now used for follow up visits and chronic condition care

Citibank

VP, Customer Insights

Leader of Customer Satisfaction & insights for Global Digital Channels

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?

Using Data to Influence Decisions

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

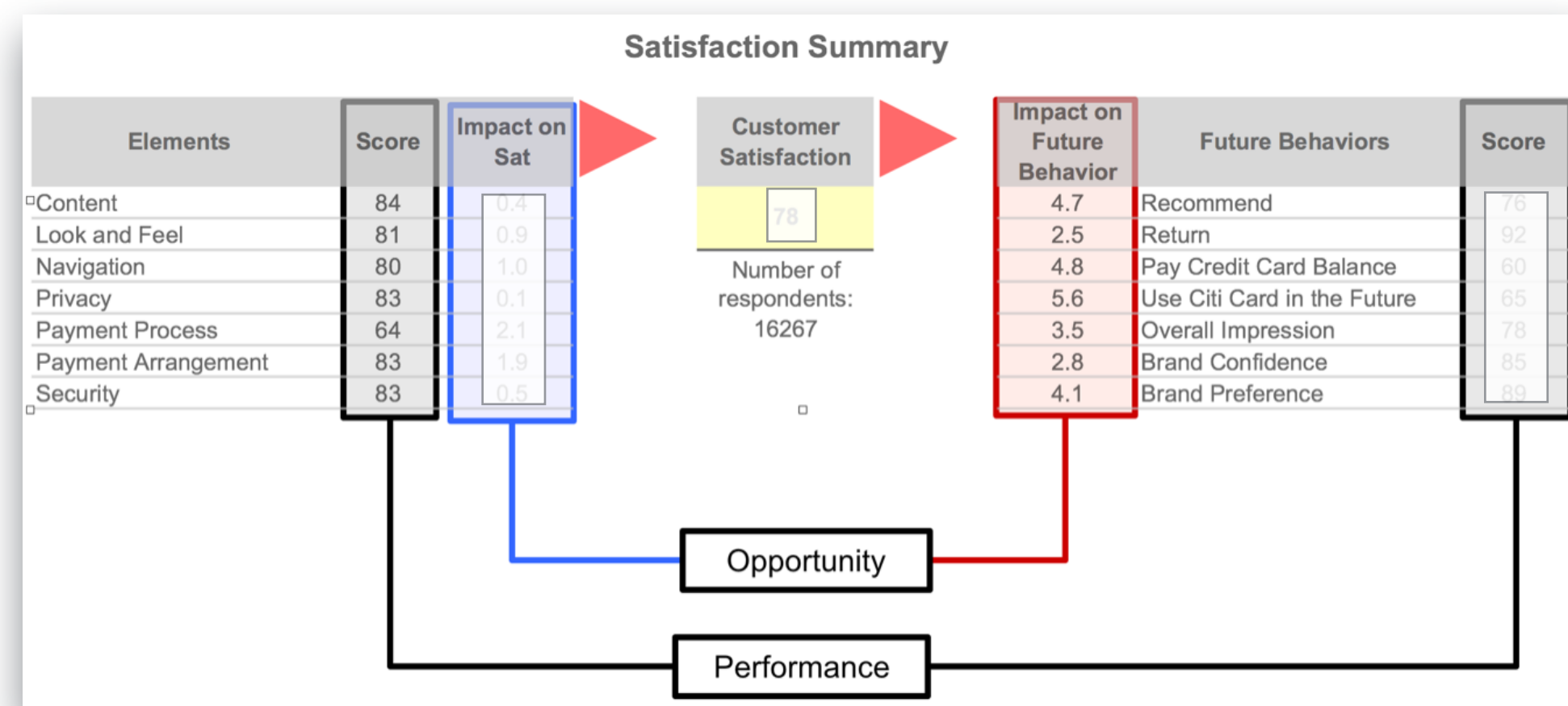
Expand capabilities across global digital acquisition and servicing channels — including:

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

RESULTS

Based on success of US credit card program, led expansion across all North America products; followed by global rollout

Prioritizing ROI Using Science-Based Methodology



Measuring Customer Satisfaction & Illustrating Impact on Business

CHALLENGE

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

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

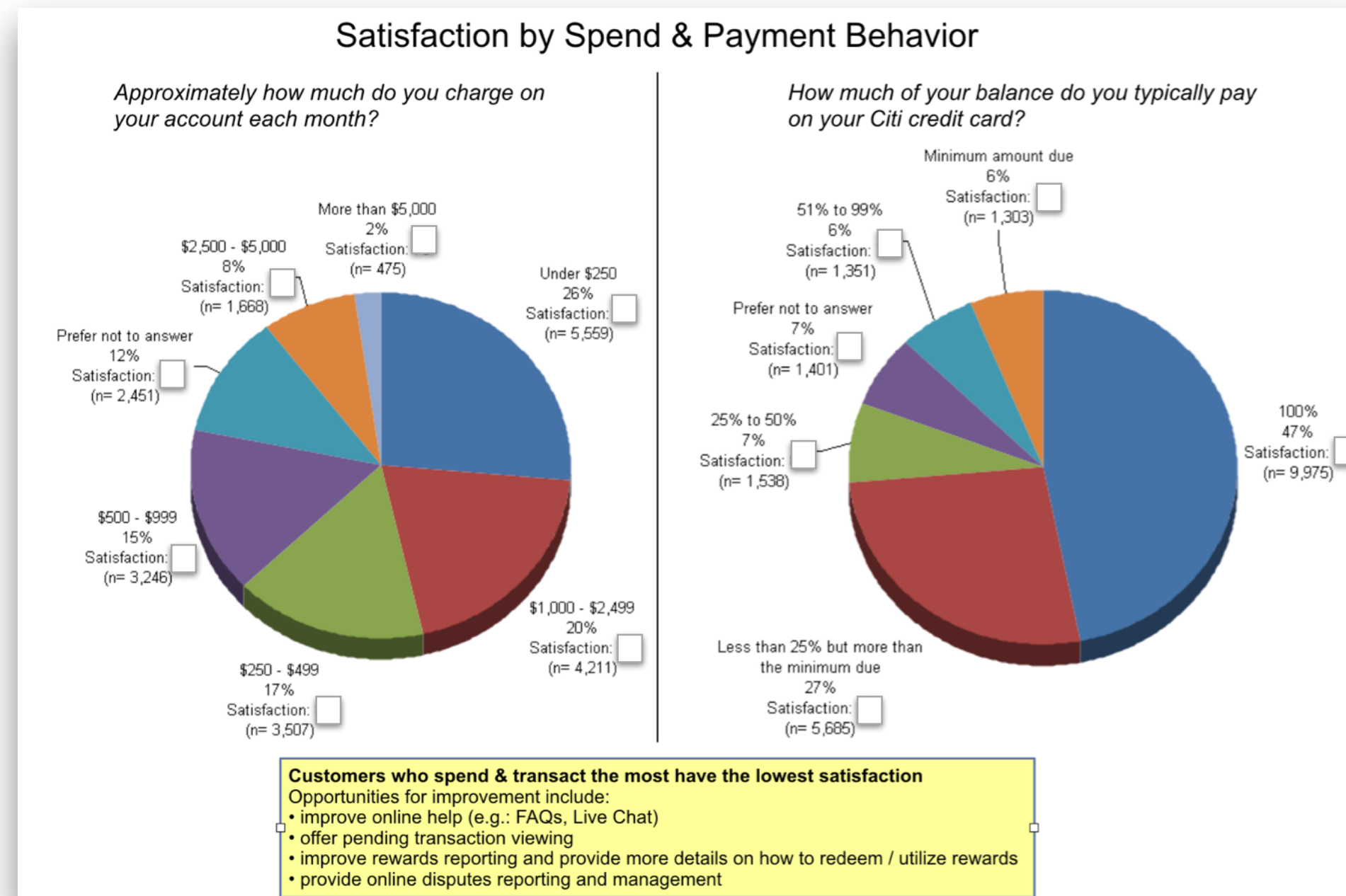
SCOPE

- 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 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

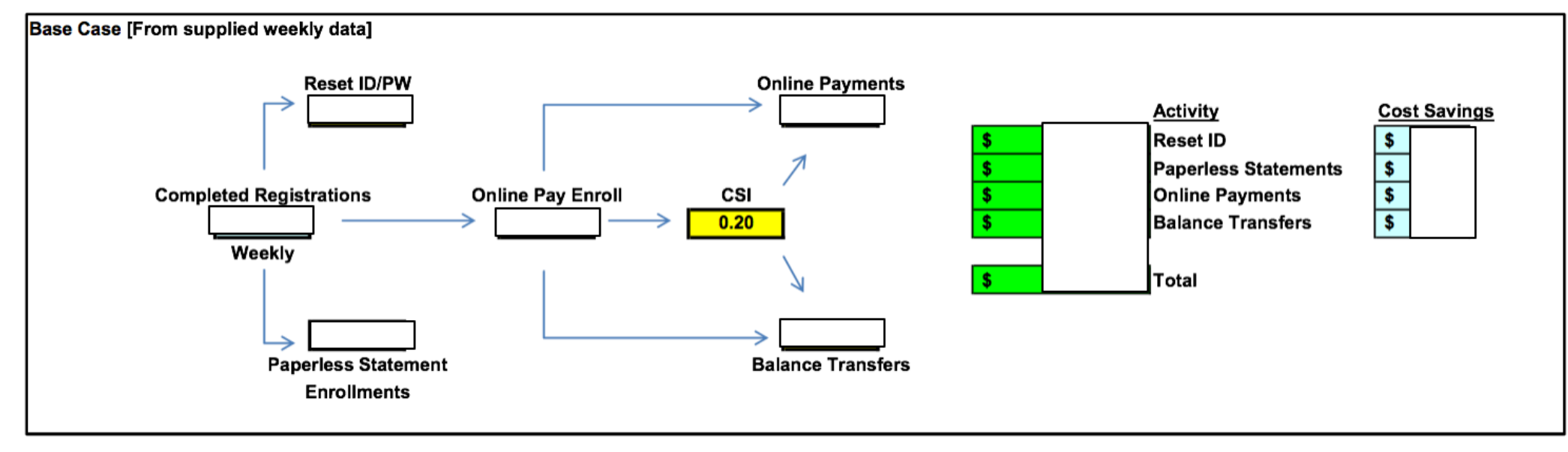
SCOPE

- 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 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 digital experience customer satisfaction had a measurable financial impact:

- Create 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 University of Michigan research-validated methodology
- Research internal costs of services

RESULTS

- Created model that prompted Citi to redesign, simplify and integrate its account registration process across North America
- Served as 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 methodology for unbiased testing
- Connect emotional needs to usability abilities

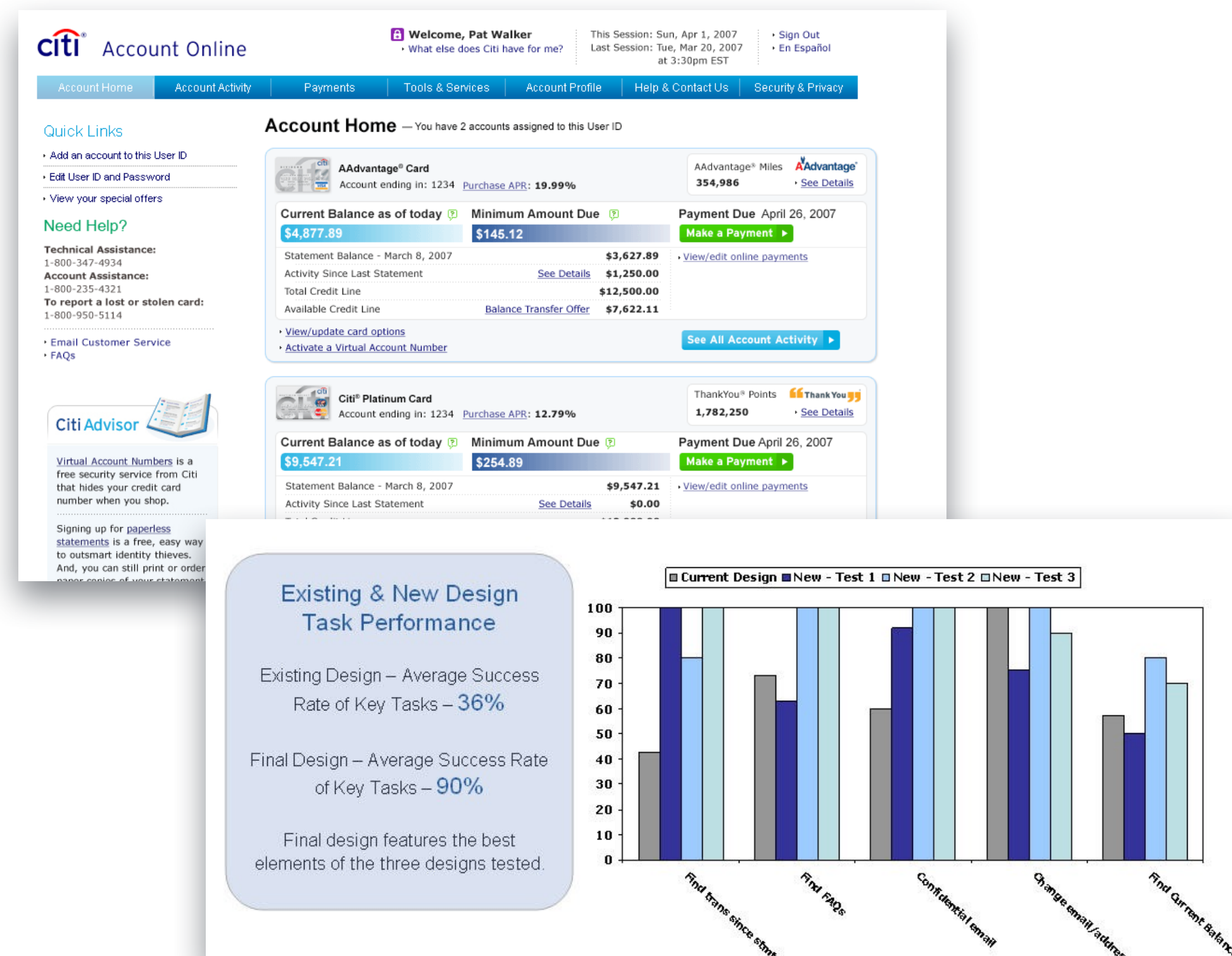
SCOPE

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

RESULTS

- Created 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 online credit card account servicing portal to:

- Improve understanding of 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 rapid prototyping and testing system with multiple product owner, 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 in purchasing behaviors
- Uncover why competitor products were preferred
- Figure out what drove payment choices at 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 owner needs, pain points, emotional influences, habits and goals — based on lifecycle and size of their company
- Enabled Citi to improve its existing card products and tailor marketing to specific personas

Thank You.
Let's Collaborate!

Email

Jack@ExperiencesByDesign.com

Call or Text

904-536-3505

Connect

[LinkedIn.com/in/JackDunlavey](https://www.linkedin.com/in/JackDunlavey)