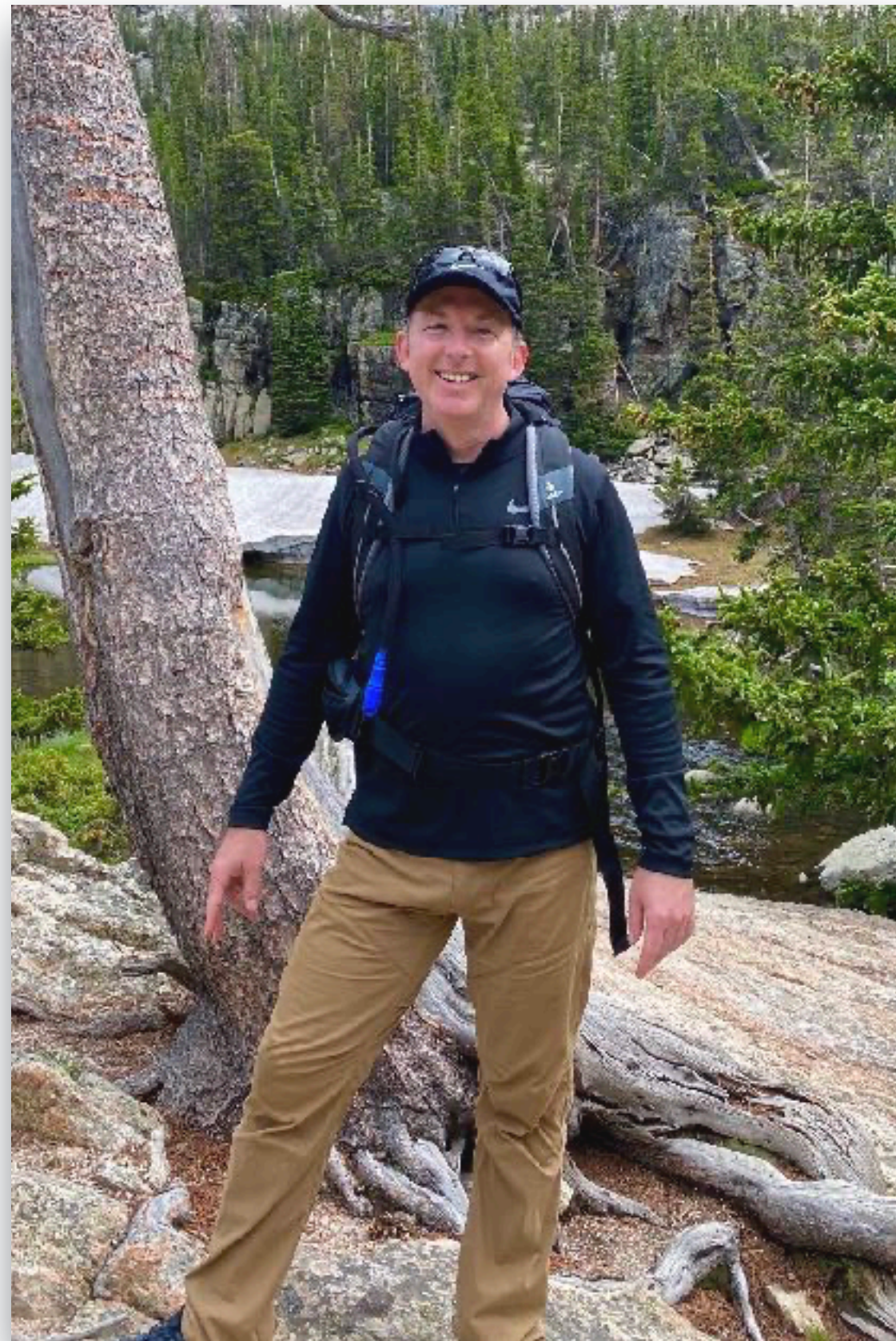# CHAUNCEY JACK DUNLAVEY

CUSTOMER + USER EXPERIENCE

DESIGN INNOVATION 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'm passionate about 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.

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.
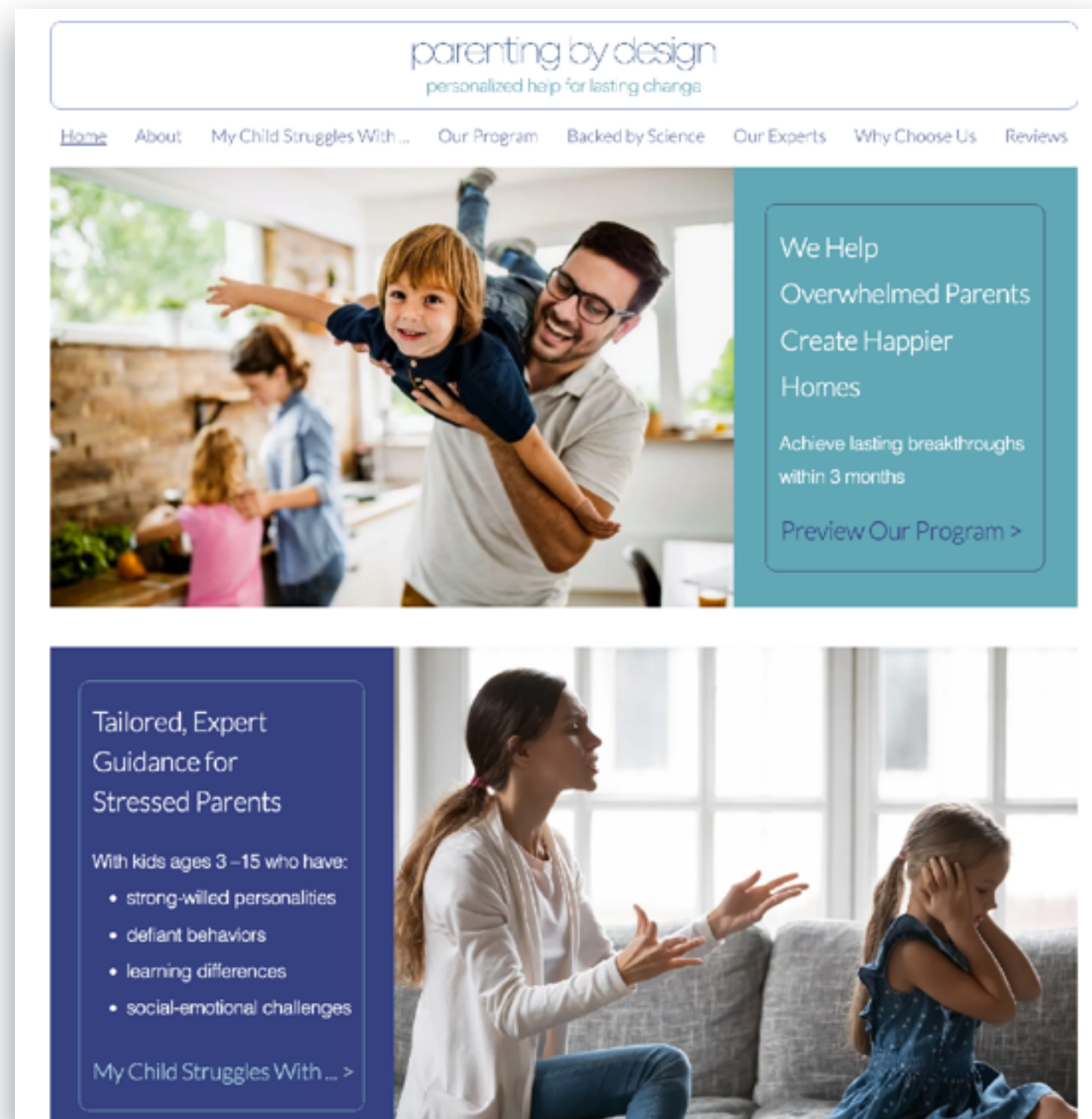
There's opportunity everywhere . . .

Let's Collaborate!

Experiences by Design

Managing Director, Customer + User Experience

Guiding organizations in solving problems for their customers

by uncovering insights to create exceptional product + service solutions

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
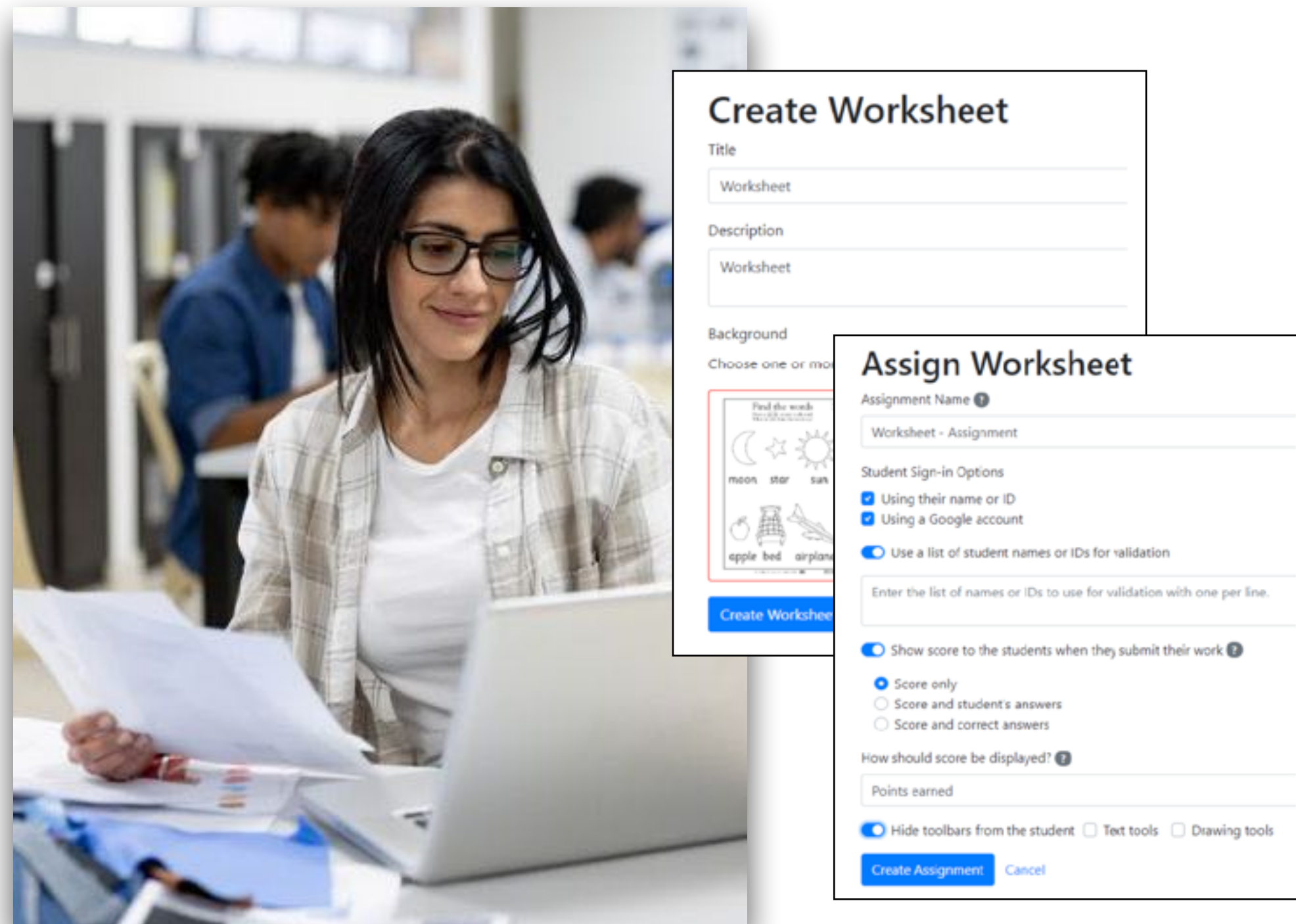
SOLUTIONS

▶ New brand with a 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 2026

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.

SOLUTION

Provided 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

Cataloged assignment types & assessment formats across multiple grades and subjects

RESULTS

2020-2021 School Year — Free
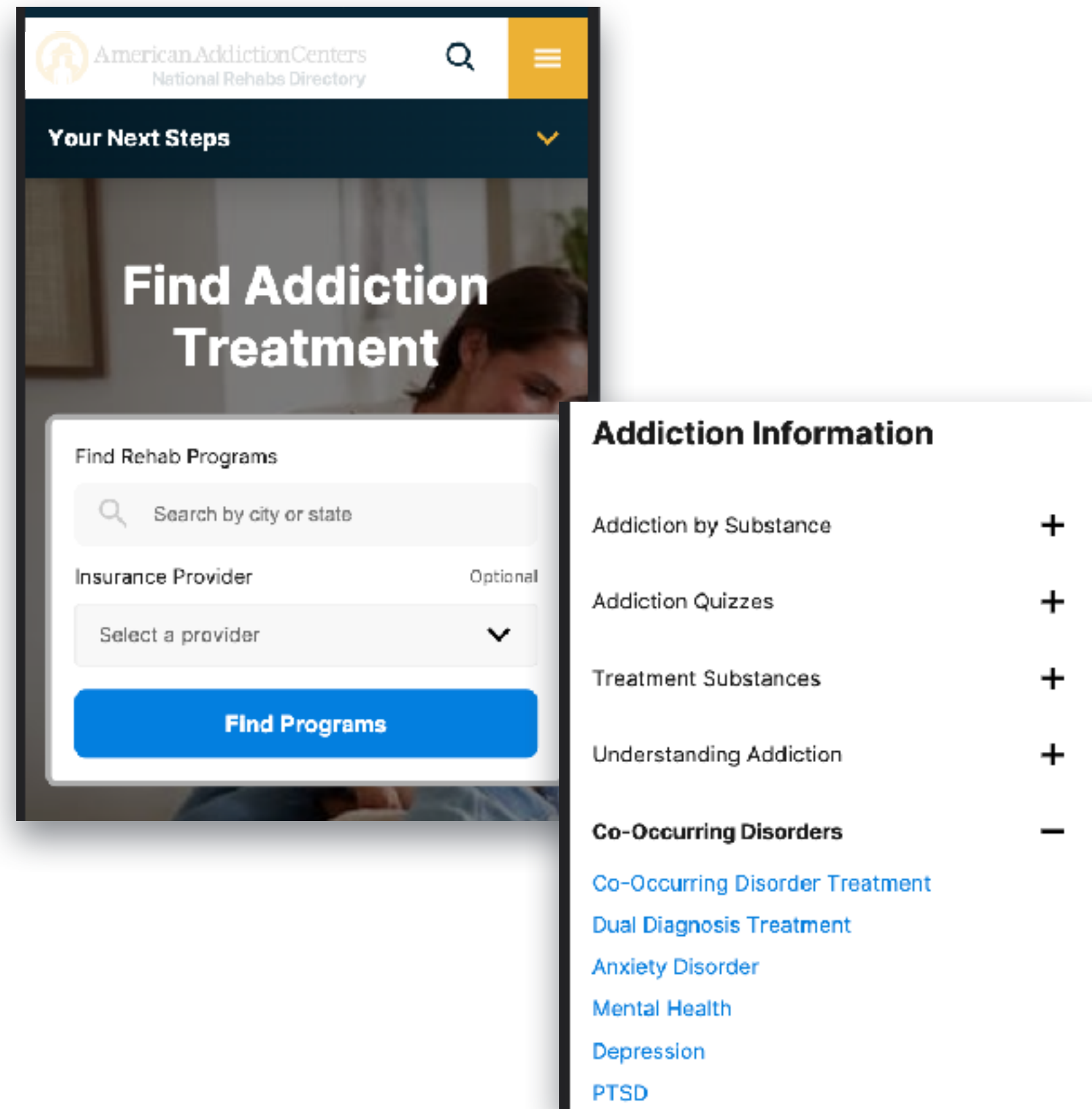
▸ 25,000+ teachers registered

▸ 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 substance misuse 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
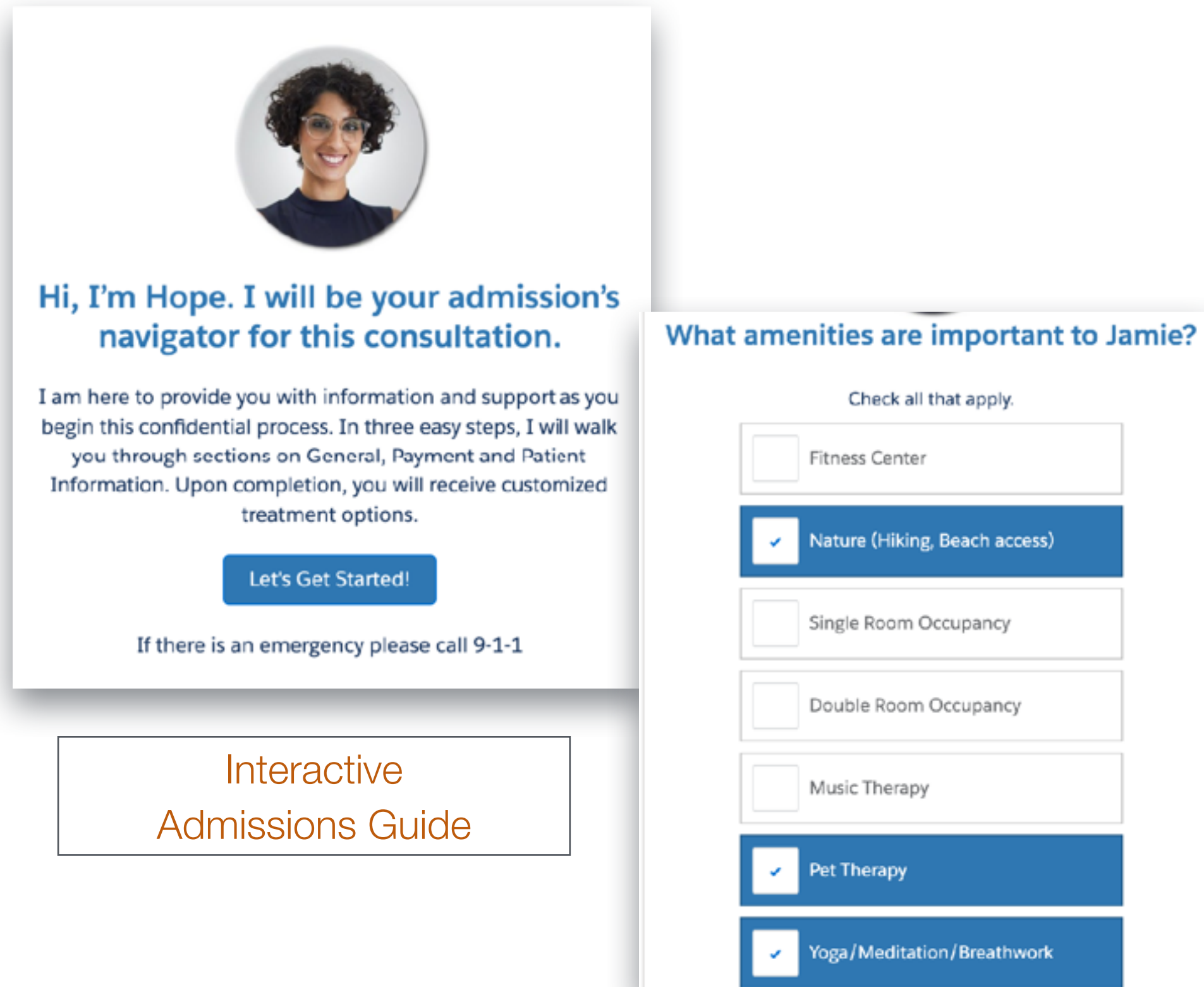- ‣ Lead redesign of websites with poor usability; penalized by Google

DISCOVERY & SCOPE OF ENGAGEMENT

- ‣ Built an in-house user experience team; lead digital agencies
- ‣ Ethnographic research; qualitative and quantitative data analysis
- ‣ Developed personas based on addiction, lifestyle, and family dynamics
- ‣ Redesigned portfolio of websites — 10,000+ pages | 100+ locations — including the largest addiction and treatment directory in the US
- ‣ 75+ substances, co-occurring disorders, and treatments
- ‣ Directed 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

Interactive
Admissions Guide

Discovering Sales Lead Solutions
Via Design Thinking

CHALLENGE

People suffering from substance misuse — 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

▸ On-site Observation Patient & Staff Visits at Multiple Locations

▸ Brainstorm Workshops with Key Stakeholders

▸ Created 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

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 to cut back made unsu so?

○ Yes

3. Do you s finding, usi drugs or al

○ Yes

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.

♥aetna™   BlueCross BlueShield   Cigna.

UnitedHealthcare   KAISER PERMANENTE.   Humana

* These fields are required

Find Insurance Carrier *   Aetna

🔍 Type To Search

First Name *   John

Last Name *   Smith

Risk Assessment & Insurance Coverage Lead Generators

SOLUTIONS

▸ Created a first-to-market, interactive admissions guide incorporating:
  – Type of Substance Misuse
  – Co-Occurring Disorders
  – Recreation & Environment Preferences
  – Facility Capacity
  – Insurance Coverage

▸ Designed multiple online addiction risk assessments based on substance and persona.

▸ Launched a 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 System

Director, Digital Marketing | Experience + Innovation

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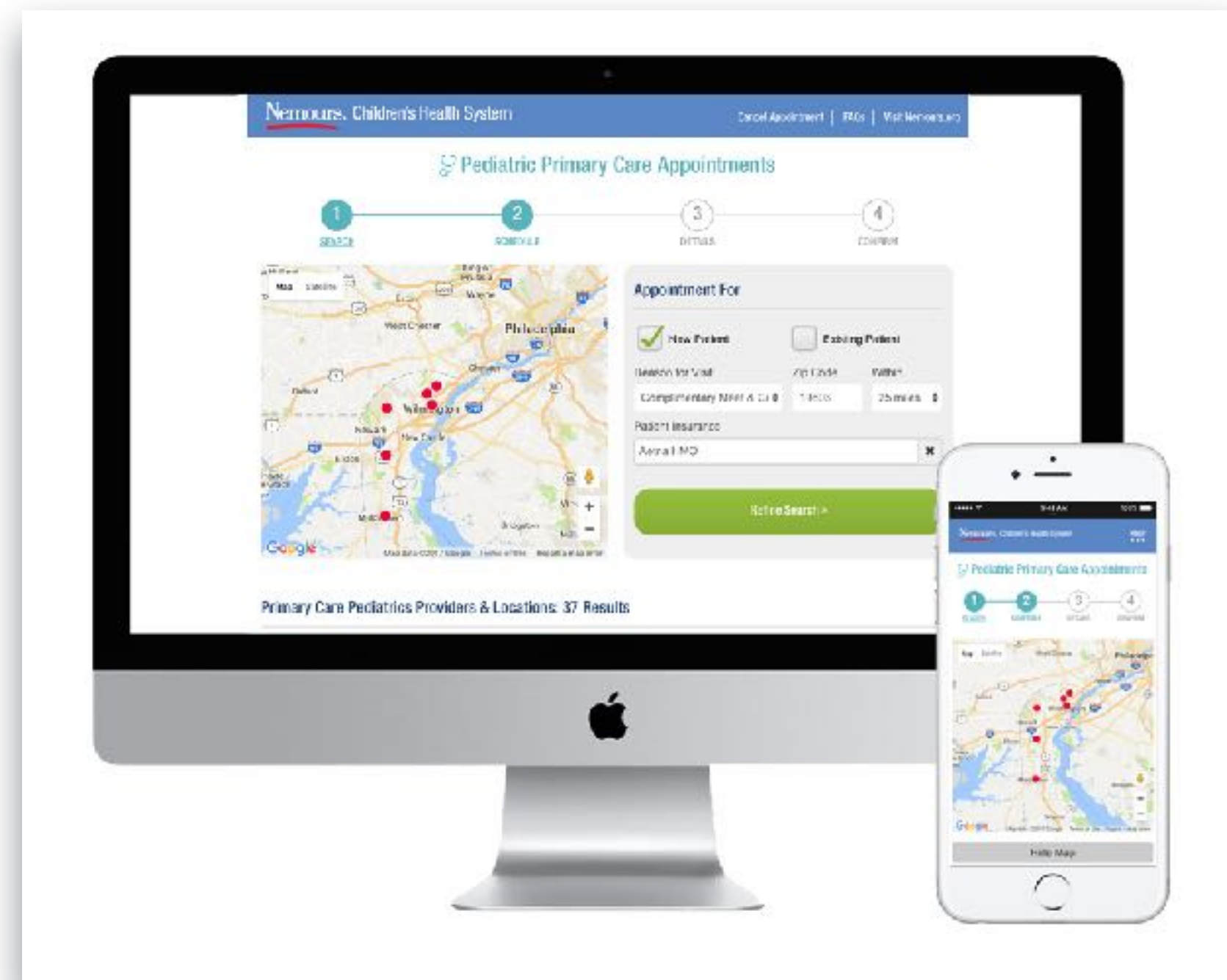
First-To-Market:
Real-Time, Medical Appointments

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 the 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
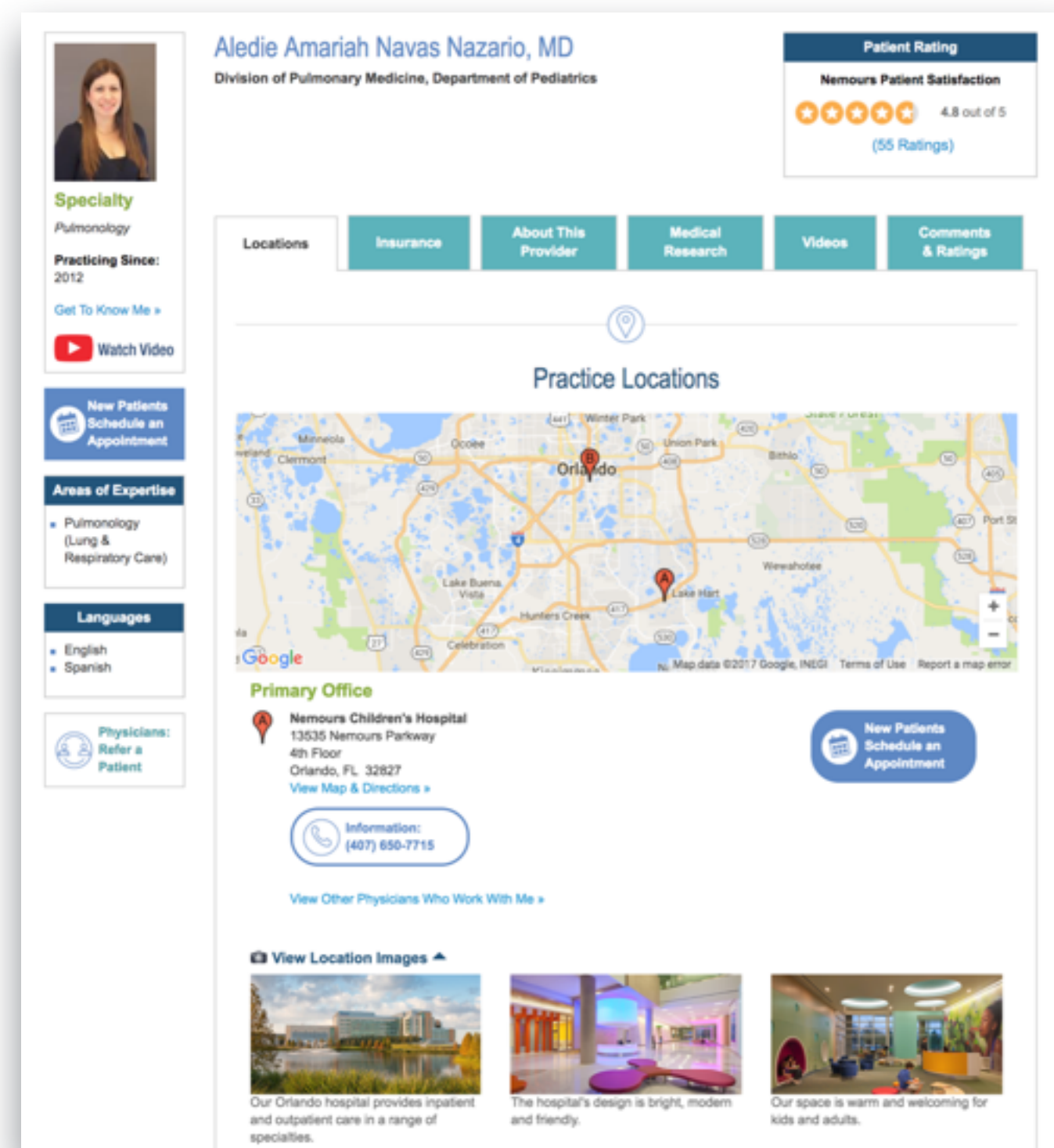
Find a Doctor
Search Directory Redesign

- 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 ability to compare doctors within same 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
- Integrated satisfaction scores and ratings
- Photo shoots across 60 locations to showcase amenities
- Created 'Get to Know Me' editorial and video profiles
- Developed a comment review and appeal process for doctors
- Extensive Voice of Customer research and user testing
- Merged, translated, and displayed 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
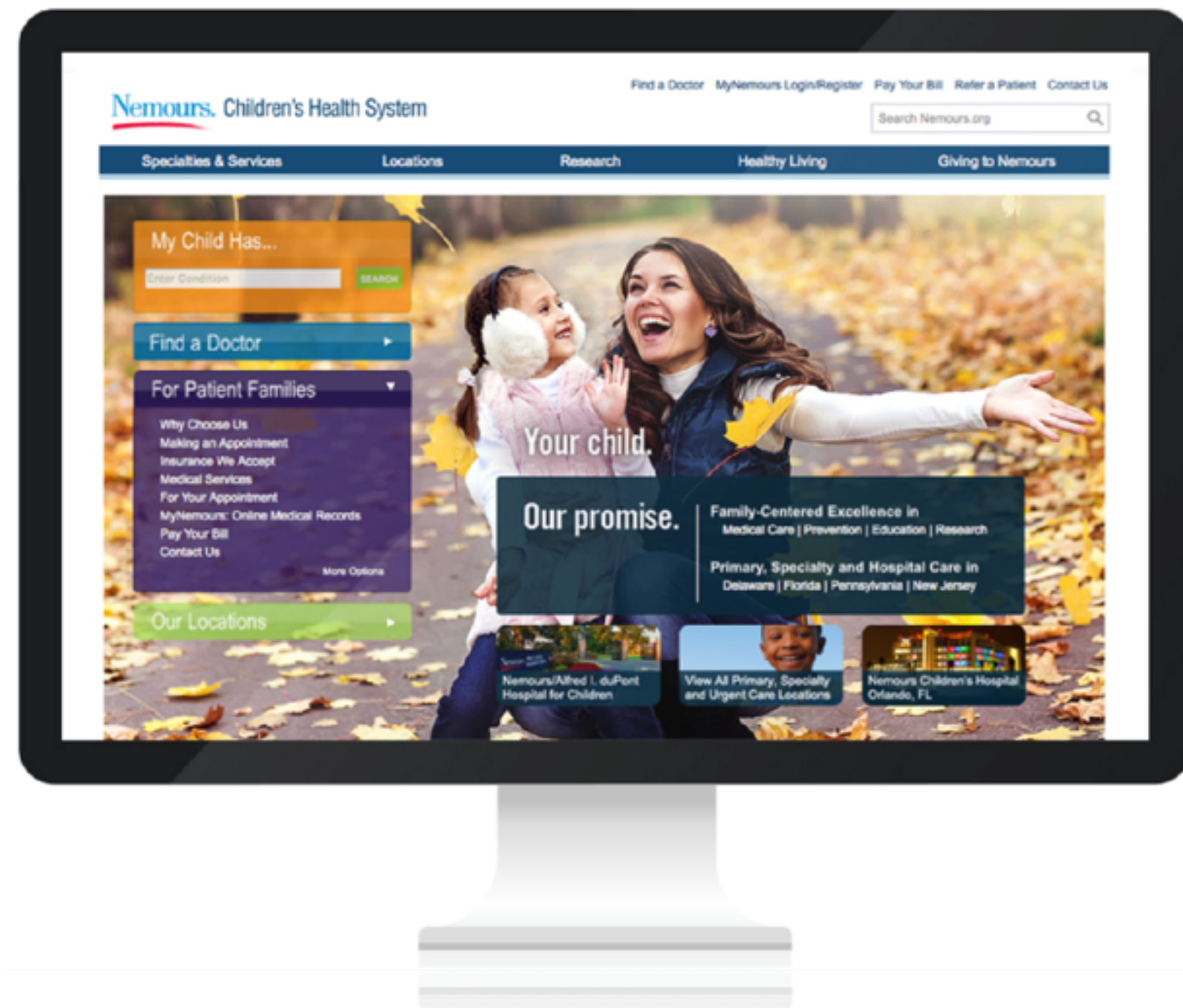
Launching New Brand With a
Complex Story & Business Model

CHALLENGE

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

▶ 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

▶ Created of 4 new specialized onsite searches

▶ Developed 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

▸ Collaborated with the Centers for Disease Control (CDC), the White House, and the Nemours Child Advocacy teams

▸ Designed a 50-page website with more than 150 resources

▸ Led 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

▸ Achieved 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 a reading curriculum, originally 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

▸ Automated the post-visit marketing program

▸ Customized resources for 8 different age groups

▸ Created 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
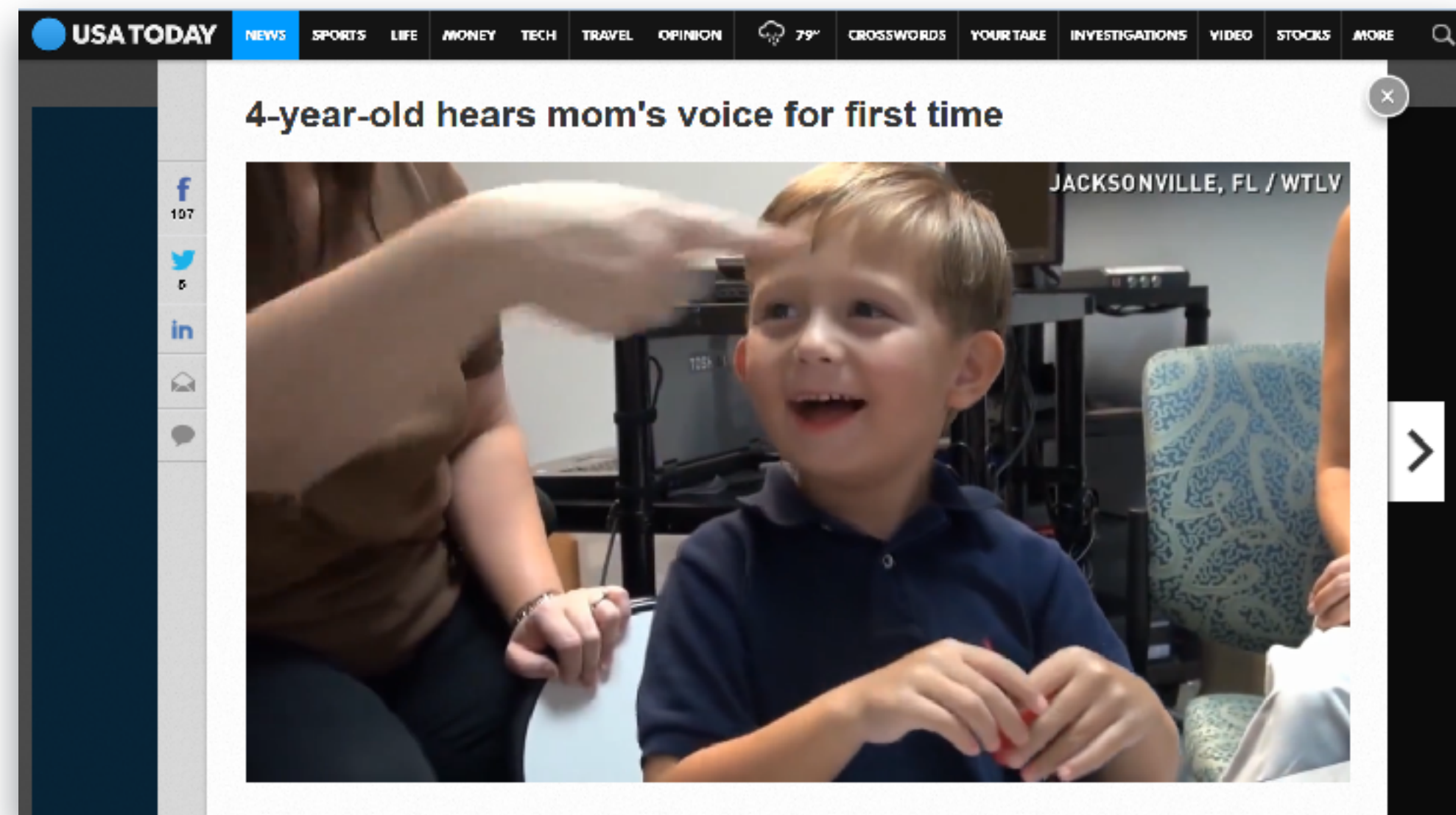
Sharing Compassion + Expertise Via Video

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

▶ Built in-house, freelance, and boutique agency video capabilities

▶ Created an editing and distribution strategy to maximize impact

▶ Launched 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 reported families 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

▸ Developed visual brand identity, description, pricing, and positioning

▸ Conducted extensive customer insights research and usability testing

▸ Collaborated with a third-party SaaS vendor on extensive product changes

▸ Designed to incorporate medical monitoring devices

▸ Leveraged 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 later used for follow-up visits and chronic condition care

Citibank | Citigroup

VP, Global Customer Insights, Satisfaction + Research

Customer Experience

Fortune 100 Organization | 150M Global Customers

Consumer, Small Business, Commercial + Institutional Financial Services

Building Organizational Trust via Customer Insights & Research Services

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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

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

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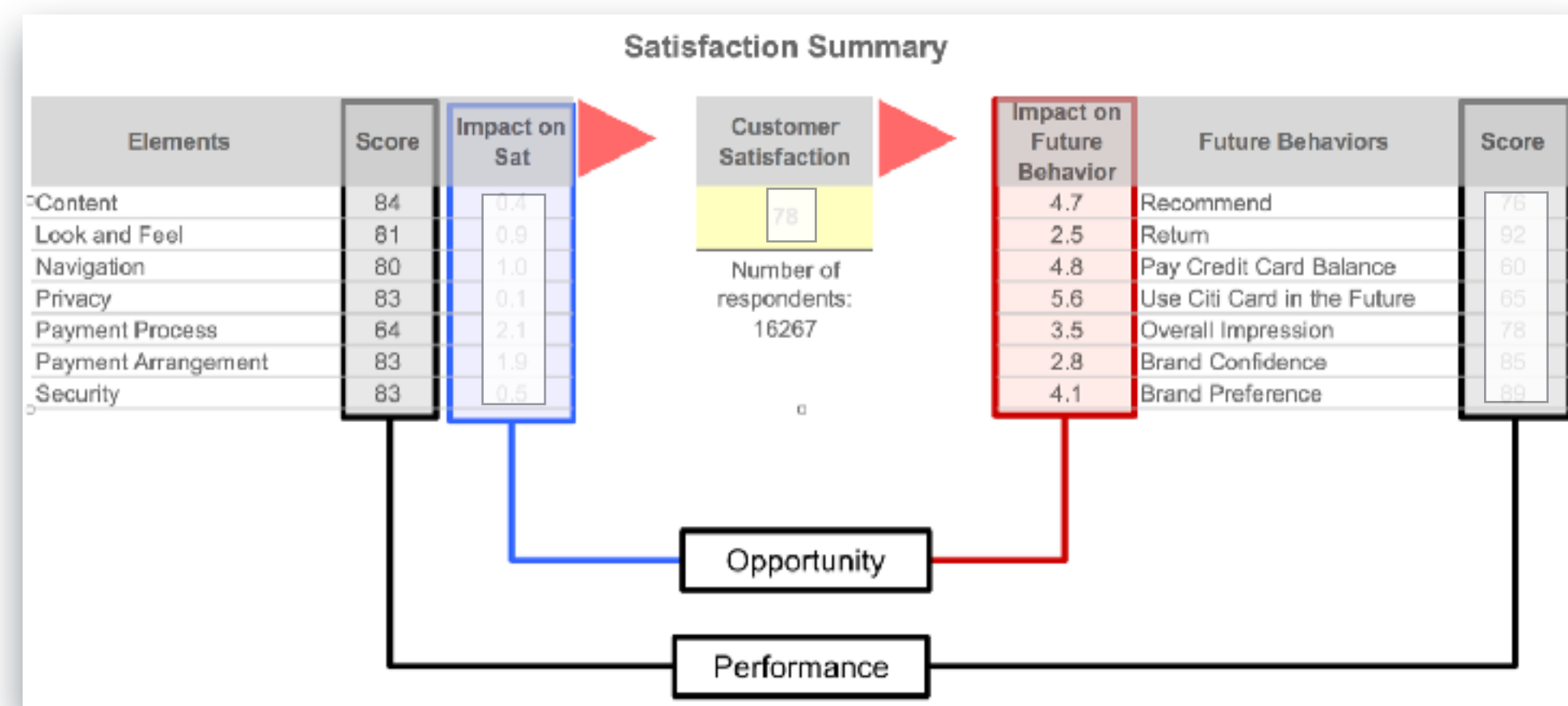- ▸ Institutional Trading and Securities

RESULTS

Based on the success of the customer insights and satisfaction program for consumer products in North America, I was asked to lead expansion into international markets and institutional clients.

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 across all global digital channels

RESULTS

▸ Voluntary adoption across most regions within 18 months

▸ Led to substantial improvements to digital experiences worldwide

▸ Validated the impact of satisfaction on business results

Delivering Actionable Insights

Satisfaction by Spend & Payment Behavior
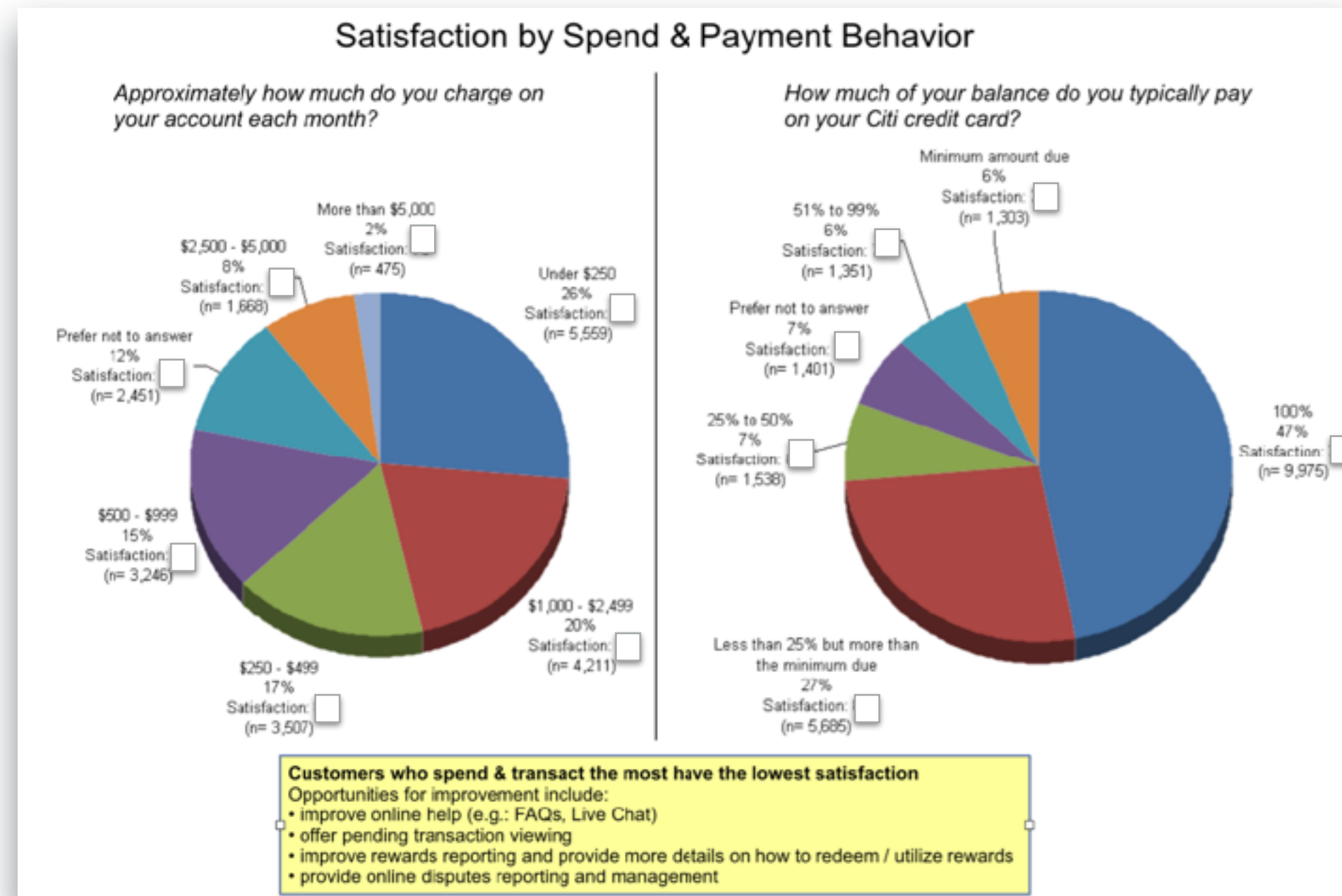
Comparing Satisfaction of Customers Segmented by Business Value

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

▸ Collaborated with regional teams to tailor measurements to:

– Highest value customers

– Local market business priorities

▸ Created automated reporting complemented by analyst research

RESULTS

▸ Generated high demand for service, with an 18-month global expansion

▸ 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
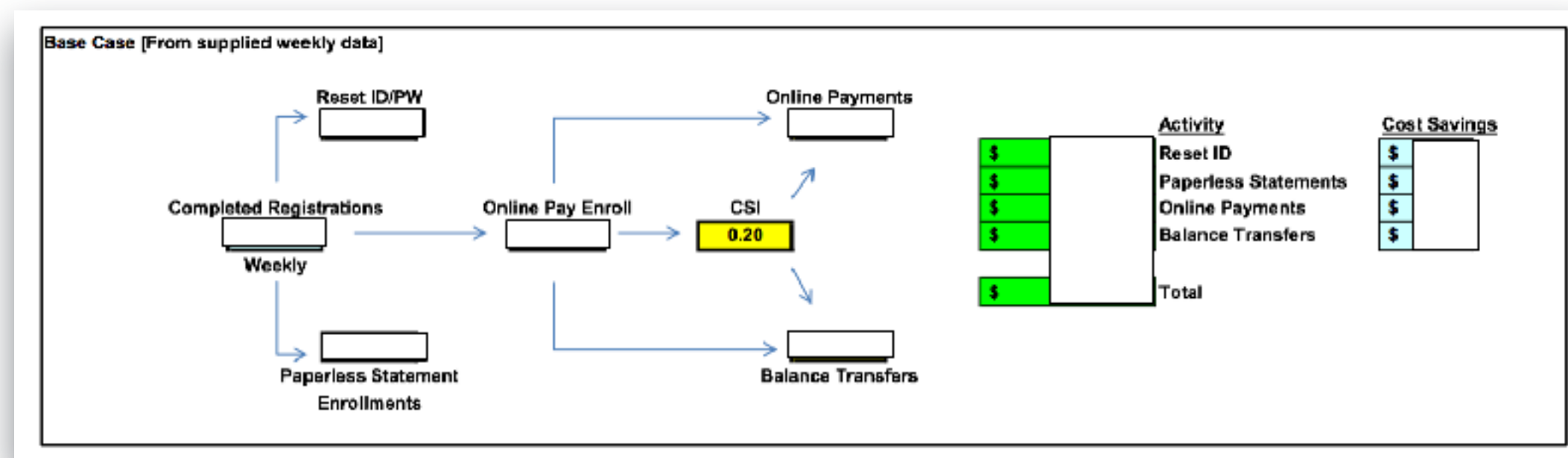
Improving success rate of Account Online registration by 50% increases overall satisfaction by 5 points =

Cost Savings of $XXX,XXX,XXX Annually

Designed 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

▸ Leveraged the University of Michigan's research-validated methodology

▸ Researched 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

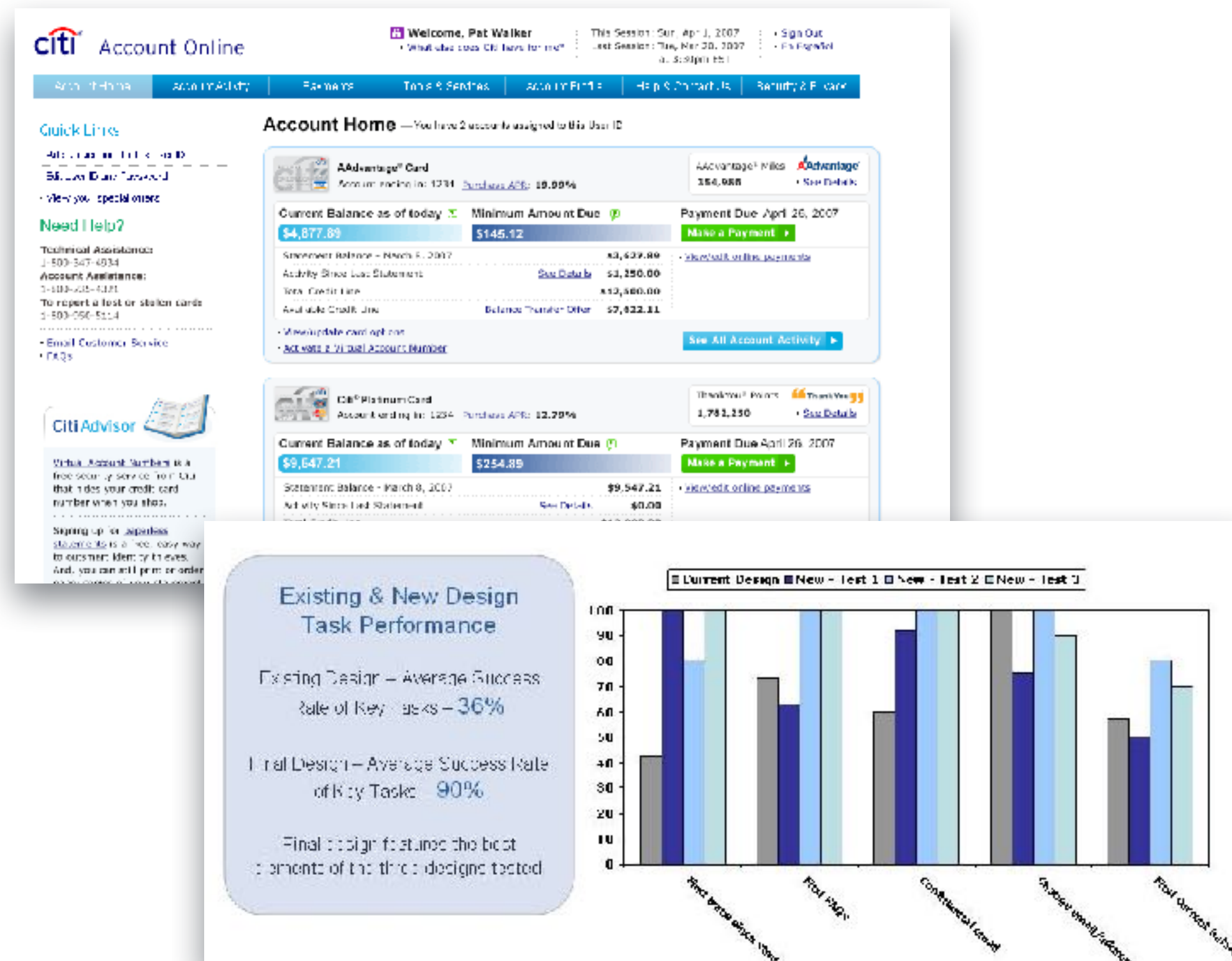### SCOPE

▸ Established a concept testing framework for 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

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

▸ Planned ethnographic research studies based on business size, ownership structure, and purchasing influencers.

▸ Observed 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. Managed agency teams.

▸ Enabled Citi to improve its existing card products and tailor marketing to specific business personas

CHAUNCEY JACK DUNLAVEY

customer + user experience

design innovation leader

Let's Collaborate To Solve Complex Problems +

Design Exceptional Experiences

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