



Head of Design

Episource (part of UHG/Optum) | California, US

9/2021 – Present

Unified multiple disjointed products into a single cohesive suite, increasing user engagement and revenue by 75% while humanizing innovative AI/ML/LLM solutions. Established a design system that reduced development time and effort, leading to an accelerated market launch.

Chief Design Officer / Co-Founder

SportsBiz | New York, US

3/2021 – 9/2021

A seasonal advisor and founding designer for a pre-seed startup company. Built MVP for an AI/ML-powered Salesforce marketing SaaS cloud with a product design strategy & roadmap.

Chief Product Officer

OrangeShine | California, US

6/2020 – 3/2021

Implemented Google AI/ML Recommendations and AI Image Search for B2B Wholesale eCommerce SaaS in PWA cloud. Launched a ChatBot Call Center. Enhanced sign-on, loyalty program, cart, and payment processes. Achieved a 68% revenue increase within 5 months.

Director, Head of UX Design

TaxAct (Avantax Wealth Management) | Texas, US

8/2018 – 6/2020

Created a customer-centric, research-driven design process, and customer journey map to re-imagine the workflow. Launched AI Textract (OCR) to increase user acquisition by 65%. Built a Design System with WCAG 2.1/Section 508 to build a new PWA Fintech app.

Global Head of User Experience

Hexagon AB | Alabama, US

5/2016 – 8/2018

Led 39 Globally distributed designers, researchers, front-end developers. Integrated Hexagon AI/ML, Blockchain technologies in multi-SaaS enterprise platforms (Hexagon BIM, AEC Smart 3D Build). Built UI Component Toolkits. Led Qual+Quant research and telemetry tests.

Director of Digital Creative Services

LG Electronics | Alabama, US

10/2013 – 5/2016

Promoted from Sr. Manager to Director. Built an NLP ChatBot in API.ai (Dialog. ow.ai). Created MarTech solutions including GMP, CDP, CRM, and responsive email templates. Improved SEO with content strategies with service designs. With the Call Center Ecosystem with multisupport channels, reduced call volume by 98%, Ops costs by 96% and increased CSAT by 66%.

Webmaster / Sr. Web Developer

Cotton Incorporated | North Carolina, US

10/2003 – 10/2013

Designed mock-ups & wireframes. Developed iOS/ Android mobile apps & 30+ mobile responsive e-commerce WordPress websites. Programmed SQL ASP.Net forms. Created WCAG 2.1, Section 508 guidelines. Set UX metrics & GTM tags. Created email templates and fully mobile responsive HTML email campaigns with media queries CSS, animations, infographics videos.

Application Developer

Builders Mutual Insurance Company | North Carolina, US

4/2000 – 10/2003

Designed and developed intranet and external websites and MS Access data applications. Created a help desk portal to reduce service tickets and improve employee experience.

Freelance Graphic Designer

Entelli Design Agency | North Carolina, US

2/2000 – 4/2000

Designed clients' logos, brochures, flyers, websites with Flash animations and print materials.

Master of Business Administration (MBA)

Information Technology
University of Massachusetts Lowell

2011 - 2013

Bachelor's Degree

Computer Science
(concentration in Computer Programming) Strayer University

1996 - 2000

Design Thinking and Innovation

Harvard Business School

2021

Human Factors

Interaction Design Foundation

2013

SQL Server Reporting & Developing Web App

Microsoft

2013

Honorary Member

Design Leadership Forum

2022-PRESENT

UI/UX Bootcamp Instructor

UC Irvine Online via Trilogly

2021

AI ML Keynote Speaker

1.21GWS (1point21GWs)

2019

LG Electronics Global BM Best Practice Award

AI ML NLP Chatbot

2015

Seoul Institute of the Arts Student Digital Design Competition

Grand Visual Design Award

1995

USER PERSONA 1

HOPELESS HAYDEN

DESCRIPTION
My life is hard enough. Funds usually live paycheck to paycheck, but occasionally I have to gigs to make ends meet. Somewhat procrastinate doing my taxes I'm afraid I will owe money. I just want to get ahead.

FINANCIAL UNDERSTANDING
Novice

CONFIDENCE LEVEL
No Confidence

INITIATIVE
Procrastinator

SEEKS HELP
Frequently

TECH SKILL LEVEL
Inexperienced

"I feel frustrated because I can never get ahead. Seems like everyone else gets a refund but I never do."

USER PERSONA 2

CONFIDENT CAMERON

DESCRIPTION
I consider myself tech savvy and am familiar with navigating all types of tax software. My financial understanding is pretty good. I am confident when filing my taxes. I like to educate myself and my finances are on track for the future. I need my tax software to be secure and provide guidance and assistance when needed.

FINANCIAL UNDERSTANDING
Novice

CONFIDENCE LEVEL
No Confidence

INITIATIVE
Procrastinator

SEEKS HELP
Frequently

TECH SKILL LEVEL
Inexperienced

"I'm always wary about the software checking for refunds. I feel like they don't know my exact situation."

USER PERSONA 3

FAMILIAR FRANCES

DESCRIPTION
I am not tech savvy or overly confident with things that are new to me. I tend to use the same tax software year over year because it's familiar and comfortable to me. I typically file in multiple sessions because I like taking my time and make sure everything is correct. It is worth my time to itemize my deductions and save everywhere I can. I'd love help organizing all of my paperwork and guidance throughout the tax process.

FINANCIAL UNDERSTANDING
Novice

CONFIDENCE LEVEL
No Confidence

INITIATIVE
Procrastinator

SEEKS HELP
Frequently

TECH SKILL LEVEL
Inexperienced

"As you get older it means a lot to you that it feels the same... familiar."

CHARACTERISTICS

- Married with dependents or empty nester
- Nearing retirement or retired (Age: 55+)
- Prepared, but not organized
- Needs multiple sessions to file
- Takes 10+ hours total to file
- Values human interaction

MINSET

- Uncertain
- Confused
- Loyal
- Afraid of change

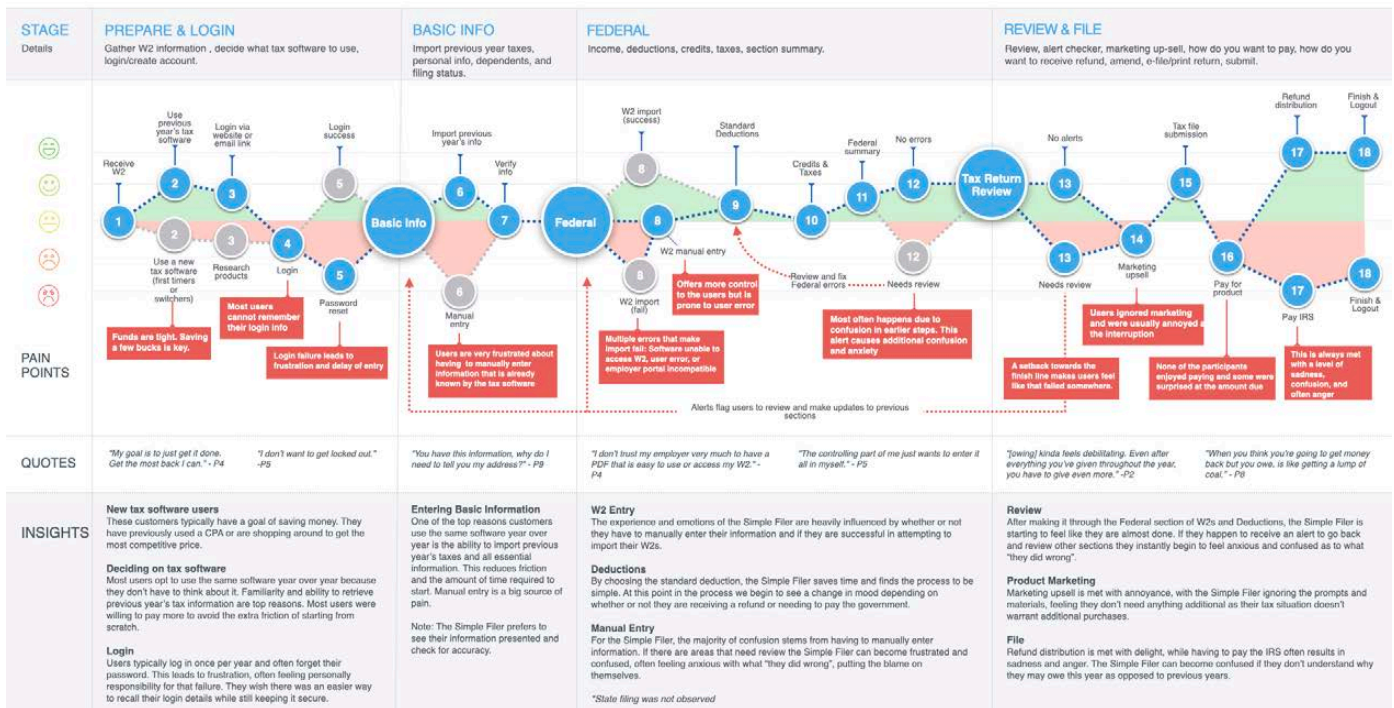
CHALLENGES

- Needs help continuously
- Organization understanding content and questions
- Organization and keeping track of paperwork
- Navigation through multiple sessions
- Difficulty working efficiently

IDEAL EXPERIENCE

I want a familiar tax software that I can trust to be accurate and secure. In looking for small victories, like being able to complete a section in one session. Since I spend a lot of time on deductions, I want to get the money I deserve.

Journey Map: Simple Filer



TaxAct

Components

Accordion

Buttons

Checkbox

Currency

Date Input

Dropdown Input

Email Input

Field Label

Input Wrapper

Password Input

Payment Input

Phone Input

Social Security Input

Text Area

Text Input

Toggle Switch

Drawer

Footer

Footnote Link

Payment Input

A payment input is a basic text input which masks the value into a dot

Credit Card

Bound Value:

Code example

```

1 <InputWrapper>
2   <template v-slot:label>Credit Card</template>
3   <template v-slot:input>
4     <PaymentInput v-model="value" />
5   </template>
6   <template v-slot:description>
7     Bound Value: {{ value }}
8   </template>
9 </InputWrapper>

```

Default Validation Rules

The phone input component defines these default validation rules.

The function validateCardNumber checks the number against the Lu

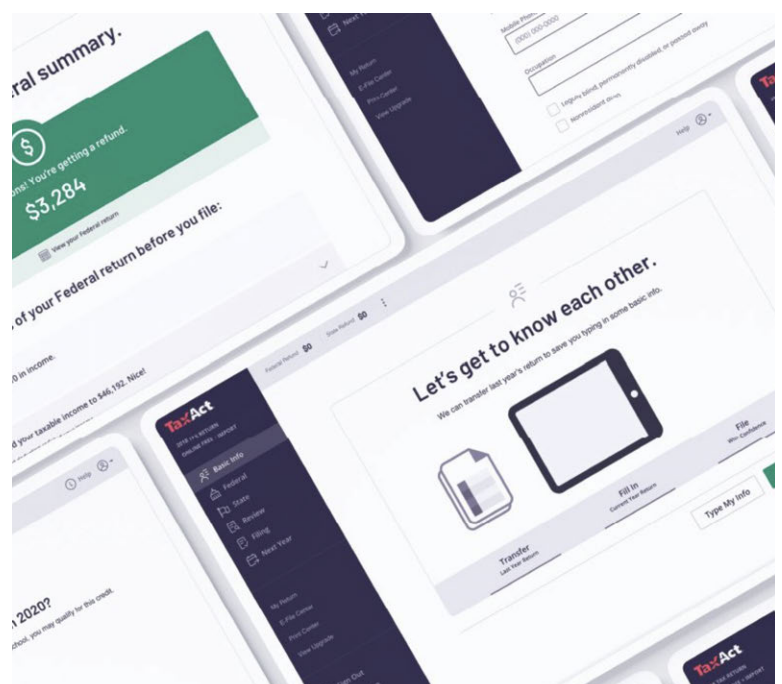
Code example

```

1 1 [{
2   run: (v: any) => v.length === 16,
3   errorMessage: 'Please enter a valid credit card
4 },
5 {
6   run: (v: any) => validateCardNumber(v),
7   errorMessage: 'Please enter a valid credit card
8 }]

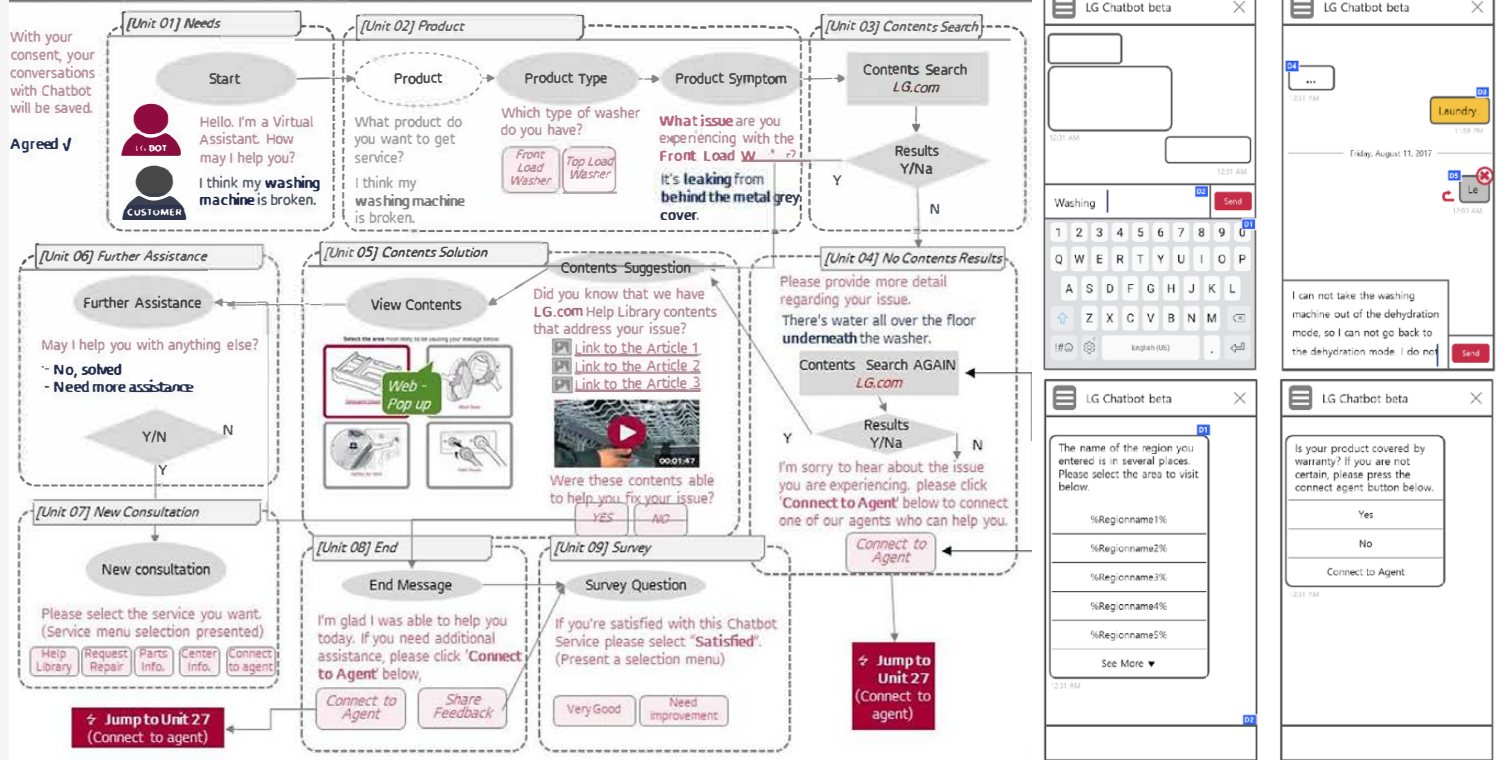
```

designsystem.taxact.com



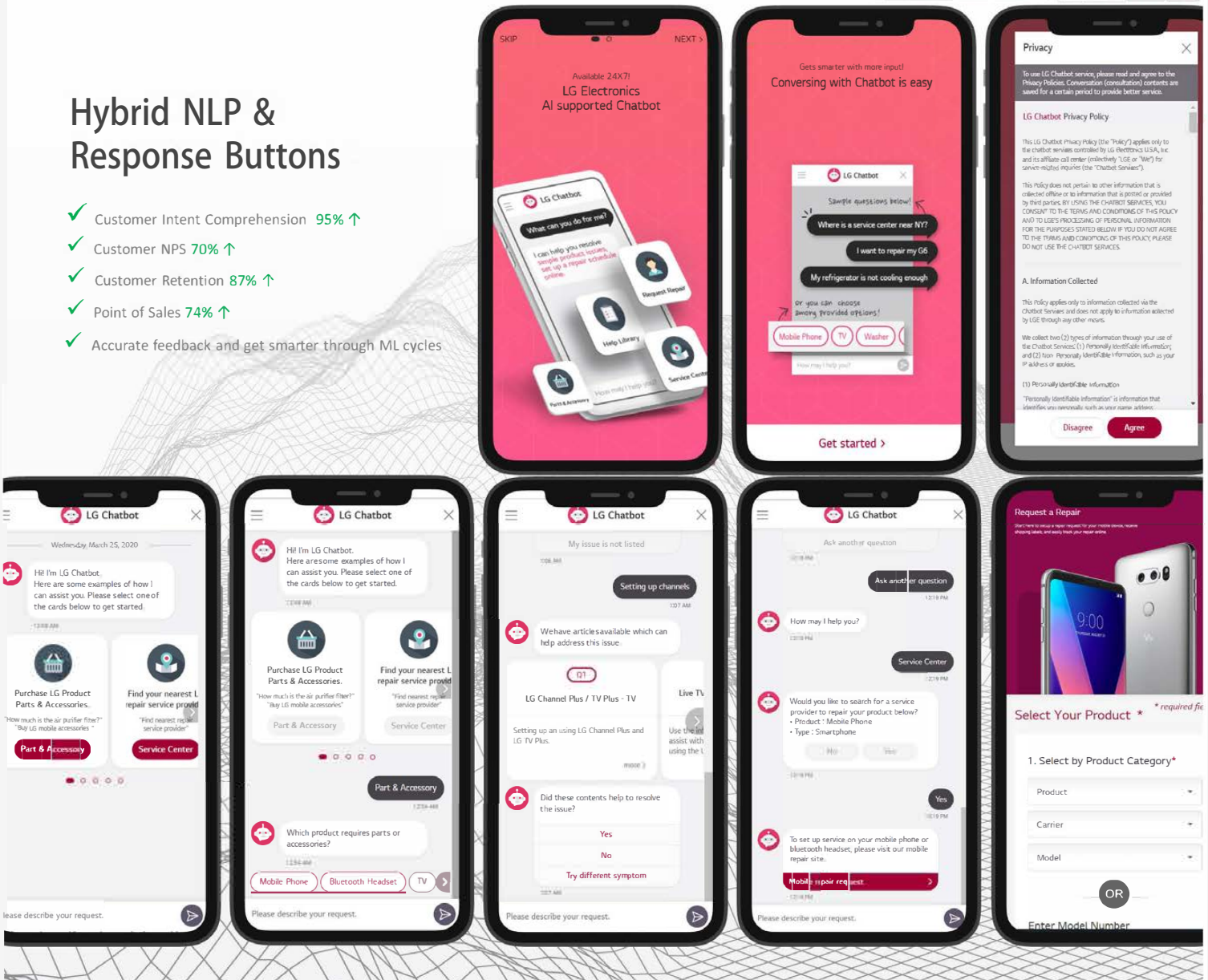
AI Conversational Chatbot

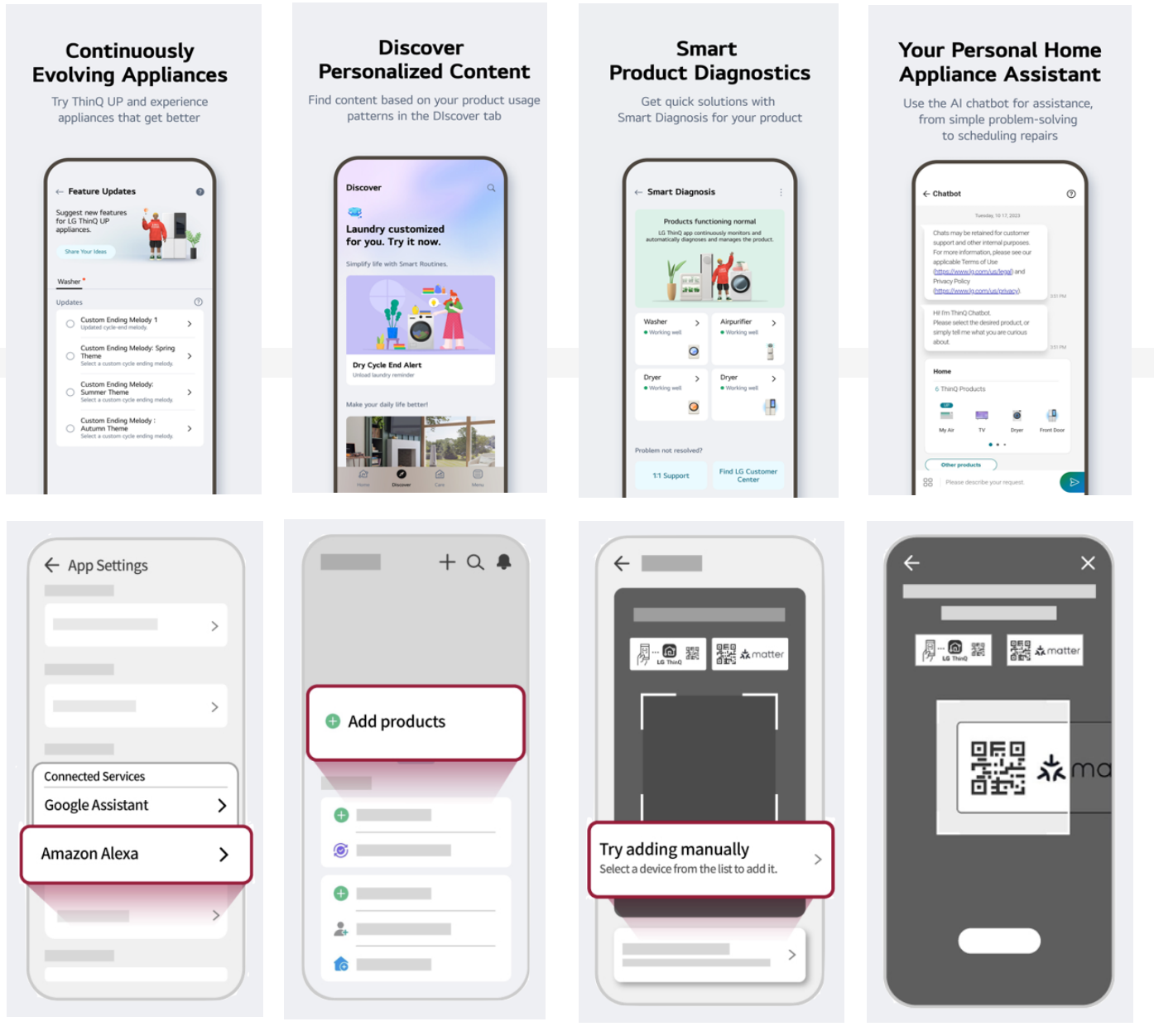
Case 01. Product Explanation & Usage



Hybrid NLP & Response Buttons

- ✓ Customer Intent Comprehension 95% ↑
- ✓ Customer NPS 70% ↑
- ✓ Customer Retention 87% ↑
- ✓ Point of Sales 74% ↑
- ✓ Accurate feedback and get smarter through ML cycles





1 A role based workflow in progress UI to provide a sense of the current phase of the task with status

2 Grouping by DOS, patient ID, provider for improved efficiency.

3 Frontload Acute, chronic, lifelong diseases, combo codes, MEAT indicators

4 NLP detects handwritten signature

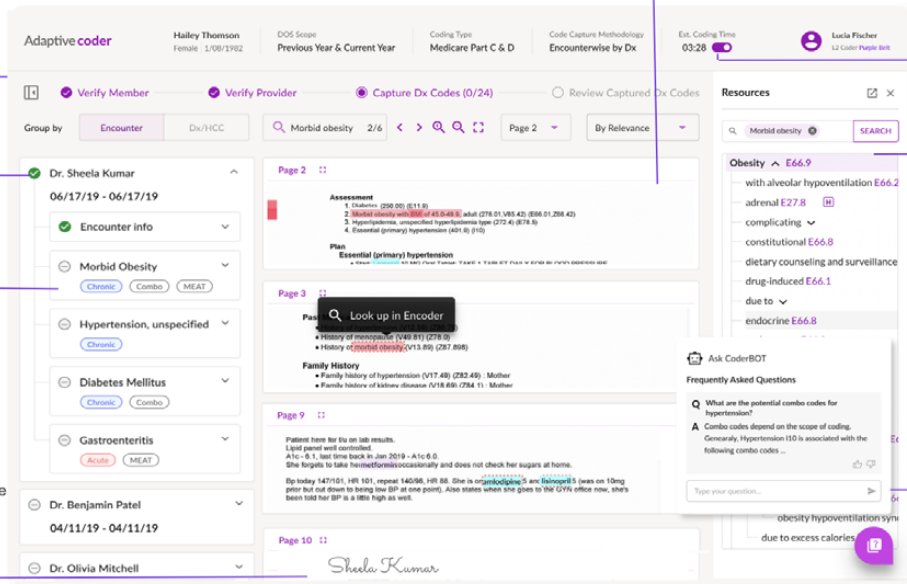
Generative AI + NLP/ML Medical Coding Tool

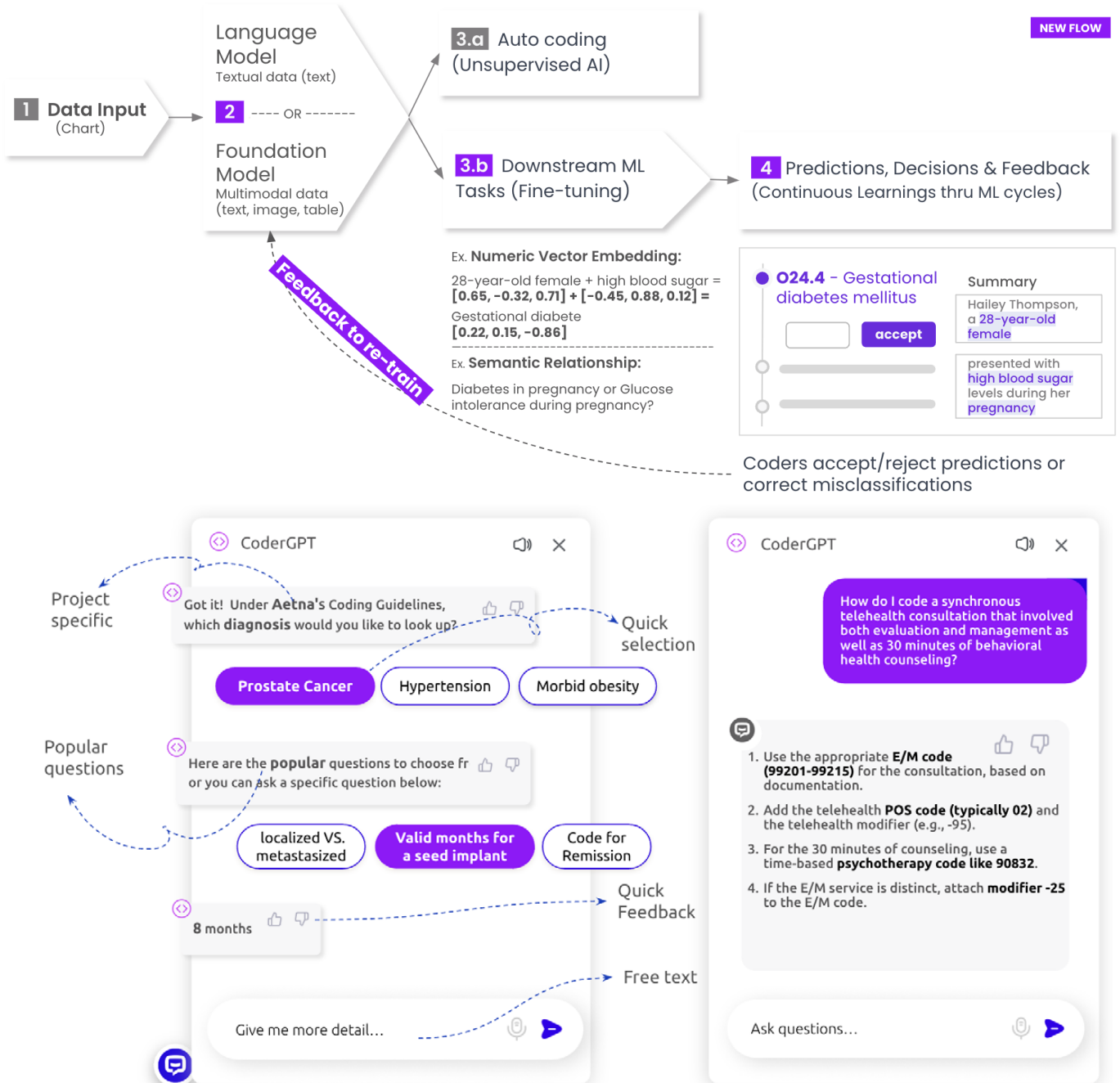
5 Multiview of highlights is displayed to help focus only on the most critical information while **hiding unnecessary info & pages**

6 Timer with an estimated coding time

7 Linked Encoder Prefetched Dx code info, project-specific coding guidelines, a Chatbot to provide quick answers

8 AI Chatbot knowledge-based chatbot with coding guidelines.





Dialogflow Essentials Global

SaaS-Widget-1 en

Intents +

Entities +

Knowledge [beta]

Fulfillment

Integrations

Training

Validation

History

Analytics

Prebuilt Agents

Small Talk

RAF Score SAVE

Enter action name

REQUIRED	PARAMETER NAME	ENTITY	VALUE	IS LIST	PROMPTS
<input checked="" type="checkbox"/>	RafScore	@	\$Raf	<input checked="" type="checkbox"/>	What is your Ra...

+ New parameter

Responses ?

DEFAULT +

Text Response

- 1 We can increase your \$Raf by
- 2 Enter a text response variant

ADD RESPONSES

Set this intent as end of convers

Agent

USER SAYS Bob score COPY URL

DEFAULT RESPONSE What was that?

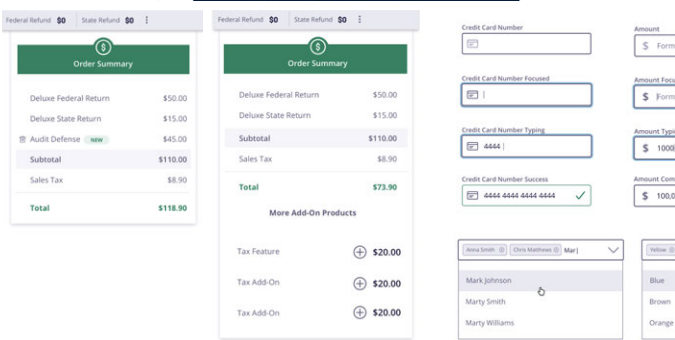
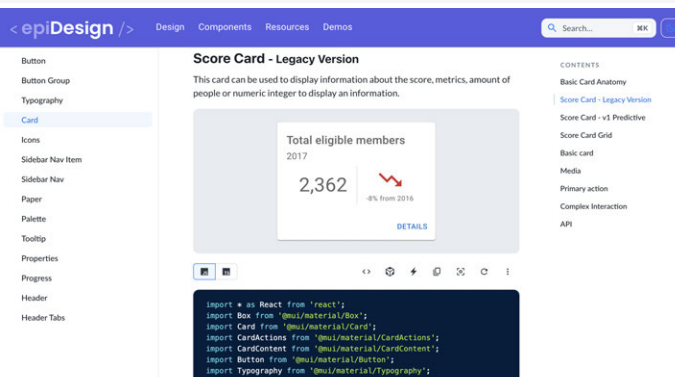
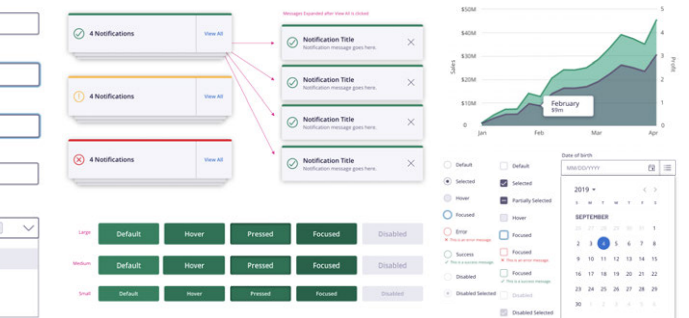
CONTEXTS __system_counters__ RESET CONTEXTS

INTENT fallback

ACTION input.unknown

SENTIMENT Query Score: 0.2

DIAGNOSTIC INFO





Immersive Reality

Mobile & tablet responsive layouts for touchscreens.

Bottom navigation bars to switch between top-level views in a single tap.

Side-by-side 40/50 visualization views with on/off of legends and label with a synchronized scrolling function.

Spatial BIM

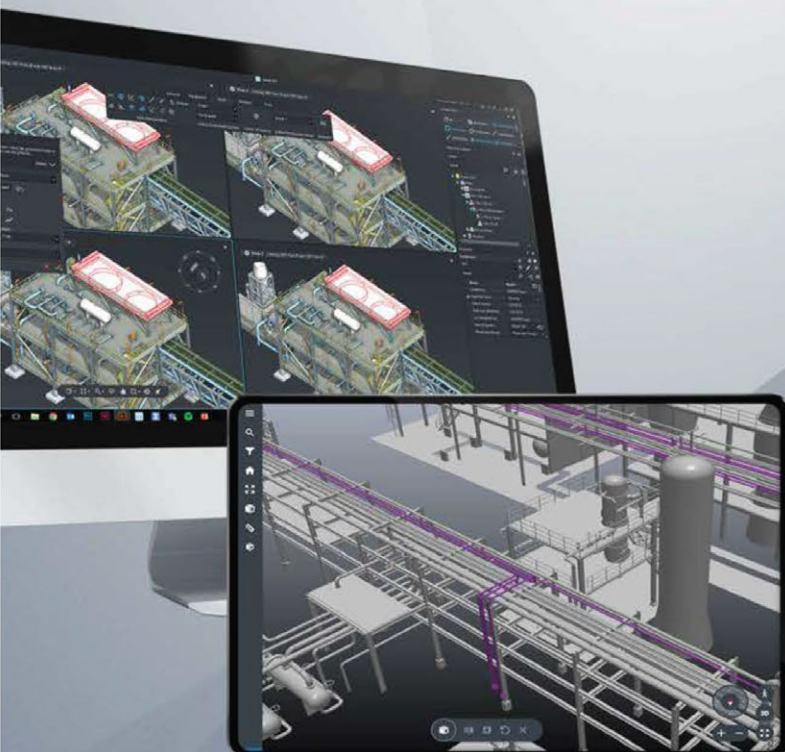
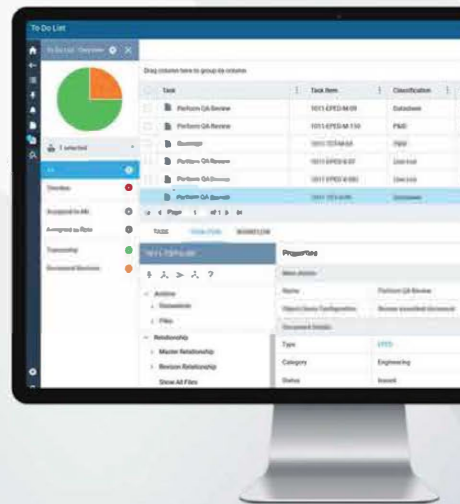
Digital Asset Management

Intuitive flow solution for Exxon clients' usability issues.

Resizable panels with clear visual cue for the selected row.

Z-pattern layout (human eye travels from left to right, top to bottom).

Optimized nav tree UI by revealing only the functionality when a user needs it.



Smart 3D

New modern dark theme that helps users focus on the 3D model.

New contextual UI controls that support specific engineering tasks.

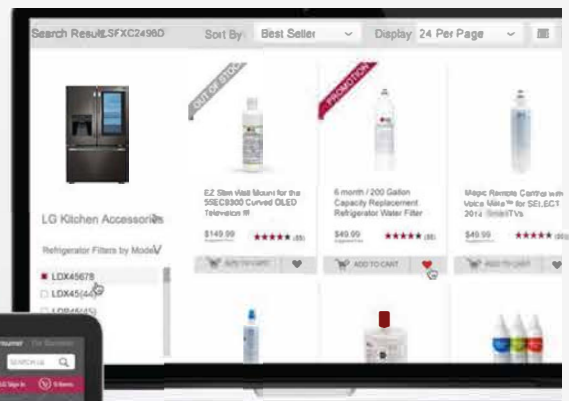
Floating ribbon bar/Floating command view
Floating FAB (Floating Action Button) bar.

New centralized messages and notification center. Redesigned modern icon library that dynamically changes colors with themes.

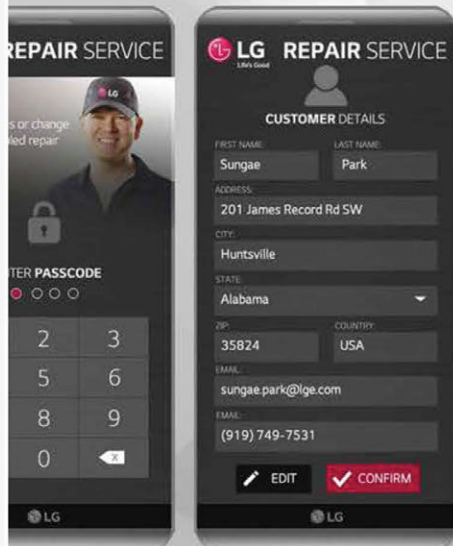
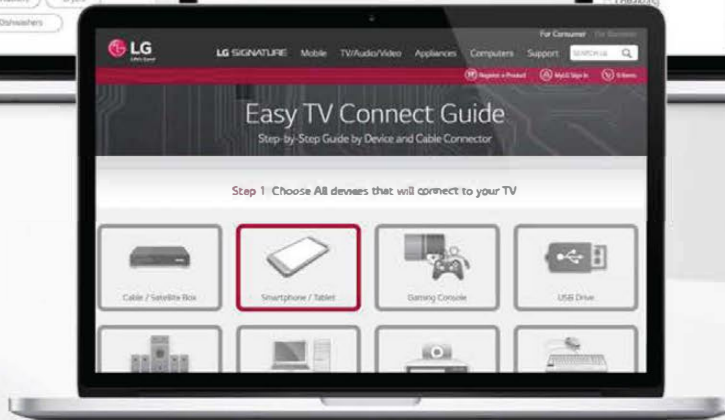


Community Portal

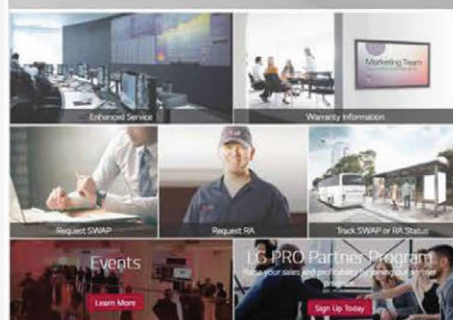
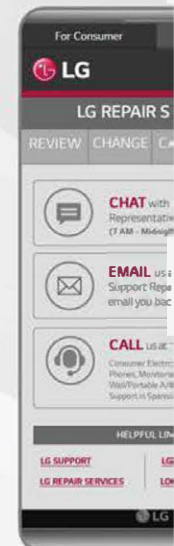
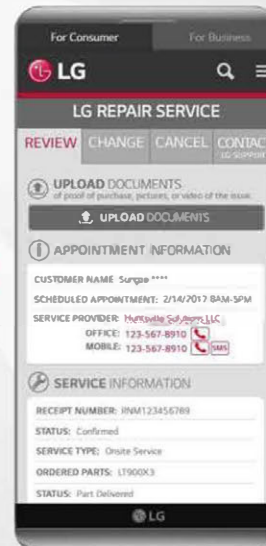
Service Design



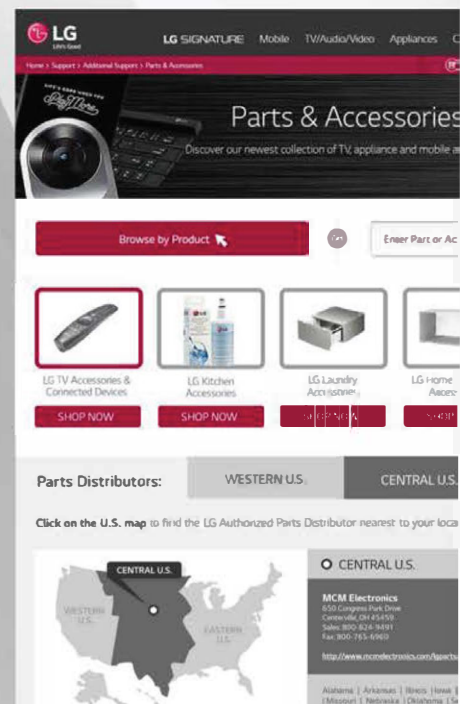
BrandShop E-commerce



Dispatch Service Mobile App



Social Media Digital Service Design





Give old denim new purpose.

Denim reborn.

BlueJeansGoGreen.org

Concept sketches | User story board | Architecture diagrams | UX mockups & High fidelity prototype | Digital content development in HTML5, Bootstrap 3.3.6, CSS, Javascript, Ajax, JQuery, ASP.Net (VB), MVC Framework, SQL.

CottonInc.com

UX Workshop & Digital Media Video Contents | Percussion CMS with ASP.net(VB), PHP, ColdFusion applications, SQL Database, Stored Procedures | Website development in HTML5, CSS, Ajax, JSON, JQuery, Responsive & Cross-browser Compatibility CRM Marketing Email Templates in Bronto - Track & Analyze Email Distribution Data.

CottonUniversity.org

IA flows | Wireframes | UX usability A/B testing | SEO strategies | Google Analytics & Google Tag Manager | Video editing | digital content development in HTML5, CSS, MVCJS frameworks - NodeJS & Twitter REST API.

CottonUniversity.org

Welcome to Cotton University™ THE ULTIMATE TEXTILE RESOURCE

RBTN.CottonInc.com

Research Analysis | Qualitative data | Customization in Wordpress Theme, Plug-ins, Widgets, Functions, SEO | Hand-coded PHP, HTML5, CSS, Javascript, JQuery, JSON & Social Network API Integration.

RBTN REGIONAL BREEDERS TESTING NETWORK

ABOUT | TRIAL DATA | FIBER SAMPLE SUBMISSION | PUBLICATIONS | CONTACT US

CottonCultivated.CottonInc.com

Concept sketches | UX mockups | Wireframes, Customization in Wordpress theme, Plug-ins, Widgets, Functions, Taxonomy, Tags, Ajax custom fields | Digital content development in HTML5, CSS, PHP 5, Javascript, JQuery, MySQL data integration & Social network API integration.

CottonCultivated

Logo Design: COTTON CULTIVATED

TheFabricOfOurLives.com

Design Briefs & Strategy | IA, UI, UX Mockups & Prototypes | Responsive web/ mobile & e-commerce platform development in PHP Magento Framework, HTML5, CSS, Javascript, JQuery, Web Services & Social Network API Integration.

TheFabricOfOurLives.com

discover cotton

UX PRINCIPLES



BE CLEAR

The tasks of the system operation should make sense. Ensure that **users can predict the outcome of each action** they take and understand the logic behind decisions. Provide clarity and transparency for definitions and terminologies.



SENSE OF PLACE

Allow users to see their progress during their journey. Recognize interruptions occur regularly. Design for frequent interruption and multi-session usage. Allow for users to easily pick up where they left off and access specific pages they may have to come back to at a later time.



COMFORT IN THE UI

Reduce visual clutter and provide clear paths through the user experience. **Utilize consistent colors and patterns so users can predict what function will occur.** Highlight priority items and make long, complicated functions feel visually appealing and scannable.



LOGICAL WORKFLOW

Design in a linear and progressive path forward to create a more intuitive experience. Detect issues as early as possible and allow users to correct them in place. Consider building explicit support for common user workflows.



CARRY THE LOAD

Automate what is currently manual to lessen the load on users. Utilize the latest technology. Humanize the experience. Avoid forcing repeated work. Cognitive burden should not fall on our customers.



UNDERSTANDING PREFERENCES

Allow for common settings and patterns that users consistently select. **Let customers establish personalized settings and meaningful defaults.** Avoid forcing repeated work.



SOLVE FOR ONE, EXTEND TO MANY

Embrace diverse ideas to be more inclusive. Exclusion happens when we try to solve problems using our own biases. Design for everyone. Employ accessibility and inclusive design to create products that are accessible and reachable to all users.



ANTICIPATE USER NEEDS

Provide the right information at the right time to help users complete their journey. Be intuitive and take the initiative to clear potential barriers before users ever reach them. Leverage gathered data to predict user behavior and personalized journeys.



HELP USERS NOT FEEL HELPLESS

Provide helpful, targeted information to educate and empower users. Recognize when users are struggling and provide help the way they prefer it. Inform and empower users to feel confident. **Utilize visual imagery to assist in common areas of confusion.**