ROBYN *boler*

UX DESIGNER WITH A PASSION FOR RESEARCH

Working with my team on the Amazon Explorer project. Indiana University - Bloomington. Fall 2012. Photo: Yizhou Pan.

About me

My journey into design began during my junior year of college. I was in my statistics class, when I had an epiphany, realizing the path I was heading down was not for me. I had yet to explore what I was truly passionate about. After some soul searching, I realized two things: **I enjoyed solving problems, and I loved creating things**. I then started searching for a career that would challenge me while allowing me to express myself creativity; this led me to the world of HCI.

As a designer, your basic practices do not change, however, it's the thrill of exploring a problemspace that allows growth...and this is what attracts me to HCI. Overall, I am passionate about design and research and **I want to use my creativity to collaboratively develop solutions that will impact a wide range of people**.

I am currently based in the **Charlotte Metro** area, working for **Salesforce's Customer Success Group** team. I utilize my talents as a senior designer to enhance the mobile and desktop experiences for our provider B2B customers, with an emphasis placed on the healthcare and home improvement customers.

FUTURISTIC

ADAPTABLE

STRATEGIC

3

Design Process

Through my career, I have found that design does not follow a linear process, rather the needs of our customers shape how we land upon a design solution. Below you will find some of my favorite tools to utilize when exploring a problemspace.

PROBLEM FRAMING THRU EXPLORATION

Affinity Diagramming
Card Sorting
Contextual Inquiry
Ethnography
Interviews
Persona & Scenario Development
Sketching

CONCEPTION AND PROTOTYPING

Arduino (Uno/LilyPad)
Elito Method
Paper Circuits
Paper Prototypes
Storyboarding
Wireframes

EVALUATION AND LAUNCH

Design Critiques
Focus Groups
Usability Testing
User Acceptance Testing

"
Anyone who has never made a mistake has never tried anything new.

-Albert Einstein

DESIGN
study

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Primary CTA   Secondary

EMAIL DESIGN SYSTEM

UX Design • Strategy (Research, Design Execution)

The Email Design System (EDS) was an initiative to create a scalable, modular email framework for Newrez, a mortgage company, to ensure brand consistency and improve efficiency. I joined the project early on to lead research and strategy, collaborating with stakeholders to identify pain points and align design with development best practices.

To establish a seamless workflow, I worked closely with the development team to align on best practices, set up a structured meeting cadence, and gather internal assets to streamline the process. Stakeholder interviews and research shaped our approach, helping define goals, constraints, and key deliverables. We balanced branding needs with technical feasibility, addressing challenges like color flexibility and modularity while ensuring scalability for future enhancements.

My role involved leading the research, strategy, and design execution of the EDS. I worked cross-functionally to develop a cohesive system, define content blocks, and optimize branding components. Collaborating closely with development, ensured design solutions were technically viable while maintaining a strong visual identity. The final deliverables included a fully implemented EDS, modular content blocks, and a comprehensive style guide for long-term use.

THE SCOPE.

Newrez partnered with Salesforce to develop **a streamlined, user-friendly Email Design System** (EDS) that enhances engagement, improves efficiency, and ensures compliance.

This initiative aimed to **address challenges in email creation, deployment, and accuracy while optimizing user experience and maintaining brand consistency**.

OBJECTIVES

- **Reducing manual effort** and simplifying processes
- Maintaining high standards of **accuracy and accessibility**
- **Empowering users** to independently create, manage, and optimize email communications
- Ensuring **consistency and personalization** at scale
- Aligning email design with **mobile best practices**

TARGET AUDIENCE

MARKETING TEAMS
To streamline email creation, ensure brand consistency, and reduce production time.

DESIGN TEAMS
To establish reusable components and improve efficiency in email styling.

DEVELOPERS
To create modular, scalable, and mobile-optimized email templates.

COMPLIANCE + QA TEAMS
To ensure accuracy and adherence to regulatory standards across all email communications.

END USERS + CUSTOMERS
To receive engaging, accessible, and well-designed email communications that drive interaction and conversions.

DESIGN CONSTRAINTS.

BUDGET AND STAFFING

25 content blocks, delivered by **one developer**

Any additional requests would have **impacted the delivery timeline, requiring scope adjustments**

DESIGN CONSTRAINTS.

CONTENT BLOCK CONSIDERATIONS

Newrez paid for **25 content blocks**

Prevented unnecessary use of content blocks for **small variations**

Helped stakeholders understand **what defines a content block**

Example. A multi-column component with 3 styles (icon, highlight, icon-alt)) and 3 layouts equaled 9 content blocks, consuming a significant portion of the allocation.

Optimized development by embedding **features like dividers and buttons** within content blocks

Used a **toggle feature** allowing users to **enable/ disable elements,** maximizing flexibility without **wasting block allocations**

DESIGN CONSTRAINTS

BRAND USE OF COLOR

Newrez has **10 brand colors, used by differently** by various lines of business

No clear directions on how to **apply accent colors,** leading to inconsistencies.

Some colors came in **tinted variations,** each adding complexity to the EDS.

Had to **reset expectations** on what was feasible within the system.

To ensure scalability and ease of launch, we had to limit the initial phase to launch the most critical combinations

Four logo variations were used in headers and footers

The **lack of defined color + logo usage guidelines** created design challenges.

Initially, Newrez envisioned **26 logo variations** due to combinations of color, logo, and CTA button options.

DESIGN CONSTRAINTS.

JOINT VENTURE (JV) BRANDS

Newrez has **over 10 joint venture brands**

Each with **unique color palettes**

When designing the footer, we **conducted accessibility tests** to determine which JV logos would pass against Newrez's brand colors **helping narrow** down background color **options**

APPROACH.

RESEARCH + DISCOVERY

Conducted **competitive analysis** and **best practice research** for email design and accessibility

Evaluated **existing email templates and workflows** to identify pain points and inefficiencies

Conducted **interviews with key stakeholders** leveraging design workbook and questionnaires to gather feedback

RESEARCH TOOLS
A Design workbook, questionnaire, and interviews were used to gain insights into the goals and desired outcome

APPROACH.

DOCUMENTATION PREP

Created **early drafts** to outline potential **content blocks, layouts, and style guidelines**

Documented **findings and constraints** to align expectations early in the process.

APPROACH.

ITERATIVE DESIGN APPROACH

Hosted **working sessions** with **Newrew's marketing, design, and development teams** to align on needs

Presented initial concepts in **design review meetings**

Gathered feedback from stakeholders on **usability, branding, and functionality needs**

Refined designs based on **real-world use cases and functionality requirements** to ensure feasibility

Conducted **accessibility testing** to validate color choices, contrast levels, and readability

APPROACH.

DEVELOPMENT COLLABORATION + FINALIZATION

Held **1:1 discussions with developers** to refine shared **content blocks** and ensure technical feasibility

Iterated based on **developer feedback** to ensure efficient implementation

Conducted a **final sign-off meeting** before moving into the build and delivery phase.

APPROACH.

BUILD + DELIVERY

Finalized and delivered a **scalable, flexible Email Design System** aligned with Newrez's brand and business needs

Provided **documentation and training** to ensure smooth adoption by internal teams

Final deliverables included overview of the content blocks and redlines

Readback Deck | EDS Design Approach

The process overview outlined the five key phases of development, breaking down each stage to set clear expectations. This structured approach helped stakeholders understand where we were in the process, what to anticipate in the upcoming phases, and the expected deliverables at each milestone   ensuring alignment and clarity throughout the project.

newrez | **salesforce**

WE ARE HERE

Interview Stakeholders

Through discovery we'll learn about your goals, current workflows, team structure, skill sets, tools, etc. so that the solution we design for you will work for all stakeholders.

Assess Digital Experience and Define Styles, Blocks, and Tech Requirements

We'll identify the patterns in your existing presence and recommend components that ensure a great, consistent customer experience within the parameters of email, and a technical solution that aligns with your capabilities and requirements.

· READBACK
· MOCKUPS

Iterate and Align Stakeholders

We'll work together with you to get the design system into a place that meets the needs of marketers, designers, developers, content creators, and any other key stakeholders.

REFINED MOCKUPS

Develop and Document

Once everything is approved, we'll formalize and build your design system, and then enable you on it.

· CONTENT BUILDER BLOCKS
· DOCUMENTATION
· SOLUTION WALKTHROUGH
· GUIDANCE ON LONG-TERM ADOPTION

Communicate, Educate, Migrate, and Evolve

You'll take the reigns from here, but we'll get you started on developing a launch plan, a governance model, and a change management approach that sets you up for success.

Button Style Exploration

Defining a global button pattern for consistency.

Future State |LOB Taglines

Establishing campaign-specific tagline placement.

Design Workbook

Centralized guide for branding and components.

Block System Overview

Establishing campaign-specific tagline placement.Visualizing the modular email structure.

Refined Block System

Finalized framework for scalable email creation.

The goal of the Email Design System was to establish a standardized, reusable, and mobile-friendly framework for Newrez's email campaigns. The system aimed to ensure brand consistency, enhance email creation efficiency, and optimize user experience across different teams.

KEY STAKEHOLDERS

Marketing Managers • Creative Team • Support Teams• Creative Team • Support Teams

IMPORTANCE OF UAT

- **Cross-client compatibility** (e.g., Gmail, utlook, Apple Mail)
- **Design consistency** and **brand alignment**
- **Ease of use** for internal users when building and deploying emails

SCOPE AND FOCUS AREAS

- **Email Templates:** Design, responsiveness, and visual appeal
- **Code Compatibility:** Compatibility across email clients
- **User Experience (UX):** Ease of use for email creation
- **Performance:** Email load times, especially on mobile

UAT
testing

KEY FINDINGS

MOBILE ISSUES
Iconography sizing was problematic on mobile. Adjustments were made to standardize icon sizes, improving rendering on mobile devices.

OUTLOOK RENDERING
Specific Hero Image issues were traced to user error (incorrect content block settings). This was resolved by reinforcing training on proper content block configurations.

SPACING ISSUES
Minor padding and spacing issues were addressed directly within the email design system

CRITICAL DEFECTS IDENTIFIED

Emails did not render consistently across some email clients.

Specific content blocks and settings required adjustments to ensure proper display.

ADJUSTMENTS MADE

Fixed broken elements and adjusted design components based on feedback.

Enhanced training materials and documentation to guide teams in using the system effectively.

OUTCOMES AND BUSINESS IMPACT

INCREASED CONSISTENCY
Provided a uniform email experience across campaigns, aligning with brand guidelines.

REDUCED ERRORS
Streamlined the email creation process, minimizing manual errors through flexible yet controlled design options.

FASTER EXECUTION
Post-UAT, email creation became more efficient with fewer revisions needed, speeding up campaign launches.

LESSONS LEARNED AND RECOMMENDATIONS

WHAT WORKED WELL
Style guides and **content block documentation** set clear expectations.

Step-by-step videos helped teams across locations stay aligned without live sessions.

ROOM FOR IMPROVEMENT
Enhanced **education materials** and **FAQ guides** to address common issues quickly.

Implement **UAT days before launch** with all stakeholders on call to resolve last-minute issues efficiently.

Thank you!

Questions?

Contact me

TO LEARN MORE ABOUT MY WORK

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704-458-0245

Portfolio Sample
A preview of projects I've worked on, highlighting my role, approach, and key outcomes in a concise format.

Case Studies
An in-depth look at select projects, detailing challenges, strategies, and results for a deeper understanding of my work.