Navin, Ann

Design & Usability Analyst Senior
Manager: Tim Priebe (1033540)
Evaluated By: Tim Priebe (1033540)

2023 Year-End Connect

Organization: Tim Priebe (1033540) Department
Location: US WI MKE 4900
07/17/2023 - 12/31/2023

Year-end Summary Review (Mandatory)

Manager Overall Input

Rating: Achieves

Comment: Ann was able to celebrate many successes in 2023 as she applied her extensive experience rabidly shifting from research, design and strategy as project priorities.

Ann successfully incorporating User Experience (UX) Research and other UX practices in several projects, improving product teams' understanding the value and essential insights UX brings to the product lifecycle. Ann provided valuable support to Business Hub, incorporating UX research into the product, while overcoming resource challenges. Additionally, Ann shifted her focus to provided support for D1 Business Banking and ACH improvements.

Ann made significant additions to her and the teams knowledge base by participating in Jared Spool Agile and UX workshop and created a plan to implement what she learned. Additionally, Ann was project lead for the UT.com D1 Baseline Research. Again, creatively overcoming obstacles for access to products to be tested. Ann's efforts were key to the project's success.

I see many opportunities for Ann to contribute to the overall success of the team in 2024 and look forward to what she can bring to FIS with her new role teaching as an adjunct professor at the Milwaukee School of Engineering (MSOE).

Employee Overall Input

Comment: 2023 largely consisted of incorporating User Experience (UX) Research and other UX practices in several projects, revealing many challenges but also producing momentum in product teams' understanding the value and essential insights UX brings to the product lifecycle. UX-driven products that exceed users' needs, and eliciting continuous feedback strengthens client relationships as well as providing a product that delights them. I look forward to continuing to pull together the tools, product access, and processes in the D1 Business team to capitalize on UX efforts, both in day-to-day product decisions as well as in larger, strategic product decisions.

The second half of 2023 moved the team from Platform to Banking, and my assignment to D1 Business Banking, supporting those value streams. That shift included overall team training and alignment with new sprint teams, as well as learning D1 Business (new product for me). We're just starting to work on features/UX improvements on the roadmap for next year. I look forward to incorporating proactive UX to the product and process, including ideas learned in professional development workshops (e.g., Jared Spool UX and Agile Intensive).

In addition to the change in work alignment, I am also leading the work with UserTesting.com (our research platform/partner) to conduct baseline studies with end-users for D1 Flex (web and mobile), D1 Consumer Studio (web and mobile) and D1 Business (web and mobile) to assess current state of those products. This is expected to be complete early 2024. We need to understand the current user experience – where the frustrations are, what works well, what could be better – before we can move forward with a plan that includes improved UX outcomes for the product.

The first half of 2023 included:
Assessing UX needs for several product teams, advocating for and incorporating UX Research and Design in varying projects. Highlights include:

• Organizing/Leading UX Research Forum monthly meetings
• Assessment of UX needs for Payments One configuration project that was handed off to a consulting company due to resource constraints.
• Assessment of UX needs/estimate for D1 Teller/IBS Teller/D1 Banker
• Working with UserTesting.com vendor to coordinate education sessions for the UX team, as well as facilitating their help with UX research projects.
• Business Hub - ongoing UX research and contributing to design discussions
• Other duties as assigned, including but not limited to: UX Scorecard input/testing, ad hoc D1 design rework, research library explorations.

Acknowledgement

Employee

Entered by:	Ann Navin (5433498)	Date:	02/08/2024
Status:	Acknowledge		
Comment:			

Approved Goals (Review/Edit/Add)

CEO Goals / Colleague Experience - Help contribute to a positive employee experience at FIS

ANN: Collaborate with other designers and team members on projects to better incorporate UX/research activities and knowledge into the project. Facilitate education and participation in new skills and broaden design thinking.

Cascaded Goal: Contributing to a positive employee experience is a broad category that could cover a broad spectrum. Here are a few examples: Contribute to a culture of gratitude by using the FIS Celebrate tool, help another employee to learn something new or grow their career, be inclusive of other perspectives and get input and feedback from lots of different people. These are just a few ideas. Also, consider prioritizing your own well-being: What do you need to improve your own employee experience? Discuss with your manager, ask for support, and be proactive.

Due Date:	12/31/2023	Status:	4 - Completed
Category:	2. My Performance		

CEO Goals / Revenue Growth - Contribute to an effort that brings in revenue to FIS in 2023.

ANN: Use UX best practices and UX research to ensure we're building the right thing for our clients and customers that will contribute to revenue-generating products.

Cascaded Goal: Talk to your stakeholders to better understand how the project(s) you are assigned to are predicted to bring in revenue in 2023. Follow up and continue this conversation throughout the year to track progress.

Due Date:	12/31/2023	Status:	4 - Completed
Category:	3. My Clients		

CEO Goals/ Risk & Compliance - Support efforts to design and demo products that reduce risk.

ANN: Incorporate UX best practices and research to reduce risk of building products that don't meet client needs, which protects FIS from financial risk of products that aren't profitable.

Cascaded Goal: Deliver UX designs or Demo Studio capabilities that protect FIS, its clients, and their customers against financial and non-financial risk. This could mean delivering designs that are risk compliant and meet accessibility design standards.

Due Date:	12/31/2023	Status:	4 - Completed
Category:	1. CEO Goals		

CEO Goals/Efficiency - Leverage assets to make the project you are working on more efficient

ANN: Influence teams and incorporate research to make better UX decisions and avoid rework.

Cascaded Goal: Leveraging assets could mean reusing existing code from an existing demo, utilizing design system components, or utilizing existing code, designs, or patterns.

Due Date:	12/31/2023	Status:	4 - Completed
Category:	1. CEO Goals		

Continue to cultivate professional development and leadership opportunities through work as well as organizations outside of work.

Use opportunities within my assigned project as well as through involvement with The Rotary Club of Milwaukee and as a board member with the Milwaukee Rowing Club to learn new skills, influence change and practice servant leadership.

Due Date:	12/31/2023	Status:	4 - Completed
Category:	5. My Development		

Connect Focus Areas (Mandatory)

LOOK BACK: What did you achieve during this performance period and how did you perform within the seven Performance Categories?

Manager Input

Response: Ann was able to celebrate many successes in 2023 as she applied her extensive experience rabidly shifting from research, design and strategy as project priorities shifted due to several team restructurings.

Ann successfully incorporating User Experience (UX) Research and other UX practices in several projects, improving product teams' understanding the value and essential insights UX brings to the product lifecycle.

Ann provided valuable support to Business Hub, incorporating UX research into the

Employee Input

Response: **Year End 2023**
2023 largely consisted of incorporating User Experience (UX) Research and other UX practices in several projects, revealing many challenges but also producing momentum in product teams' understanding the value and essential insights UX brings to the product lifecycle. UX-driven products that exceed users' needs, and eliciting continuous feedback strengthens client relationships as well as providing a product that delights them. I look forward to pulling together the tools, product access, and processes in the D1 Business team to capitalize on UX efforts, both in day-to-day product decisions

product, while overcoming resource challenges. Additionally, Ann shifted her focus to provided support for D1 Business Banking and ACH improvements.

Ann made significate additions to her and the teams knowledge base by participating in Jared Spool Agile and UX workshop and created a plan to implement what she learned. Additionally, Ann was project lead for the UT.com D1 Baseline Research. Again, creatively overcoming obstacles for access to products to be tested. Ann's efforts were key to the project's success.

as well as in larger, strategic product decisions.

Highlights include:

Business Hub – trying to incorporate UX research into the product, but was met with some challenges. In the end, the team and the product weren't in a place to pursue meaningful UX research but will be included in future efforts.

Shift to D1 Business Banking and ACH improvements.

Participated in Jared Spool Agile and UX workshop and created a plan to implement what we learned.

Leading UT.com D1 Baseline Research. UT.com D1 Baseline Research Challenges included:
- Relaunching dormant UX research practices – we, as a company, seemed to have de-prioritized UX research and testing in our product lifecycle so we are essentially starting from scratch with the D1 suite.
- Access to live versions of the products for internal use that has full functionality and data and features that a customer would see (vs. a demo dump that may or may not be an accurate representation of a client's implementation).
- Access to production versions of those products that can be shared with a vendor and third-party testers outside of FIS.
- Reorganization at UT.com resulting in a completely new team midway through the project that required to be brought up to speed.
- Differences in Demo Studio (the version of the products we could reliably test) and the actual in-market version of the products.
- This project is still in progress, but I look forward to exploring the findings in early 2024.

LOOK FORWARD: What actions will you focus on to help achieve our CEO goals, deliver for your

clients, and execute within the seven Performance Categories?

Manager Input

Response: Ann has a unique opportunity in 2024 to apply the many new research skills she acquired in 2023.
Ann will be making a shift to project work focusing on D1 Banking product improvements, this will allow her efforts to the left in the UX life cycle and apply her extensive skills in benchmarking, user research, iterative design, usability testing and assessing client feedback.

Employee Input

Response: The more important shift in work/responsibilities allows me to focus more on future UX improvements so there is time for UX before the value stream team(s) will start working on those stories. Ideally, we would incorporate:
- Benchmarking on features as they compare to what else is out there
- Continuous user research to ensure we understand the problem(s) to solve
- Researched user needs
- Iterative design ideas and prototypes
- Usability testing on design ideas
- Input from client advisory board members

Shifting from reactive UX design to proactive UX will have a significant impact on our product, clients and end-users.

Continue to advocate for and lead/participate in UX Research efforts for D1 (and other) products

YOUR DEVELOPMENT: What skills, knowledge and/or experiences do you want to build and what support do you need from your manager, or others, to help you develop at FIS, grow your career, & with your overall well-being?

Manager Input

Response: As in all previous years, Ann is always proactively working to improve her UX skills and industry knowledge and takes advantage of any opportunities to share her knowledge with others. In addition to supporting Ann's development goals identified here, FIS should continue to support Ann in her education pursuits as well as her role in teaching the undergraduate Interaction Design course as an adjunct professor at the Milwaukee School of Engineering (MSOE). These learning and teaching experience improves the overall skill set of the team here at FIS and expands UX as a skill set and FIS's influence outside the walls of the organization.

Employee Input

Response:
- Continue to find ways to regularly incorporate UX research and other UX activities into product development.
- Continue to seek out and participate in professional development opportunities through WeLearn, LinkedIn Learning, Baymard, Jared Spool, UserTesting.com workshops, etc.
- Find ways to incorporate user-centered design practices in day-to-day work
- Become more proficient with ever-changing technology - Figma, UserTesting.com, Miro, etc.
- Continue to participate in community organizations as a board/committee member and volunteer: Milwaukee Rowing Club, Rotary Club of Milwaukee, Wauwatosa Curling Club, Neighborhood/Community events

- Prepare to teach an undergraduate Interaction Design course as an adjunct professor at the Milwaukee School of Engineering (MSOE).