

We need a prototype

Enhancing Innovation and
Speed in Product
Development



Elements of AI product

- **Traditional Visual Design & Wireframing** - Allocation: 10% While foundational, these elements form only the basic outline of our product's aesthetic and functional framework.
- **Service Design Integration** - Allocation: 30% Here, we transition from classic service paradigms to those augmented by AI capabilities, translating conventional workflows into AI-enhanced processes that deliver a more intuitive customer experience.
- **Conversation Design** - Allocation: 30% Defining conversational patterns is essential in establishing an engaging dialogue between our AI applications and our users, making interactions as natural and efficient as possible.
- **Interaction Design** - Allocation: 30% This focuses on designing the interactive elements that will engage our users, encouraging adoption and long-term adjustment to AI integration.



Iterative vs. Waterfall Approach

- Adapts swiftly to evolving tech landscapes
- Invents and repurposes interactive patterns dynamically
- Data-driven feature design & development
- Iterative process ensures product quality
- Sustains ongoing innovation through constant design & R&D
- Scheduled feature delivery & testing with client engagement
- Costs and schedules can be easily estimated and controlled

Some Basics Rules

- Initiate design with available resources; evolve iteratively
- Feature additions grounded in research
- Experiment with styles; use data for refinements or pivots
- Adopt continuous development with user data & feedback
- We should use similar design and interaction patterns as in the traditional version

Design choices

- Bento Style for design is well suited AI based interfaces as well as dashboard
- Bento is naturally suited for card-based design
- Bento is modern and considered one of the design trends in 2024
- Dark mode is preferred by data and financial users

Compartmentalisation in UI Design



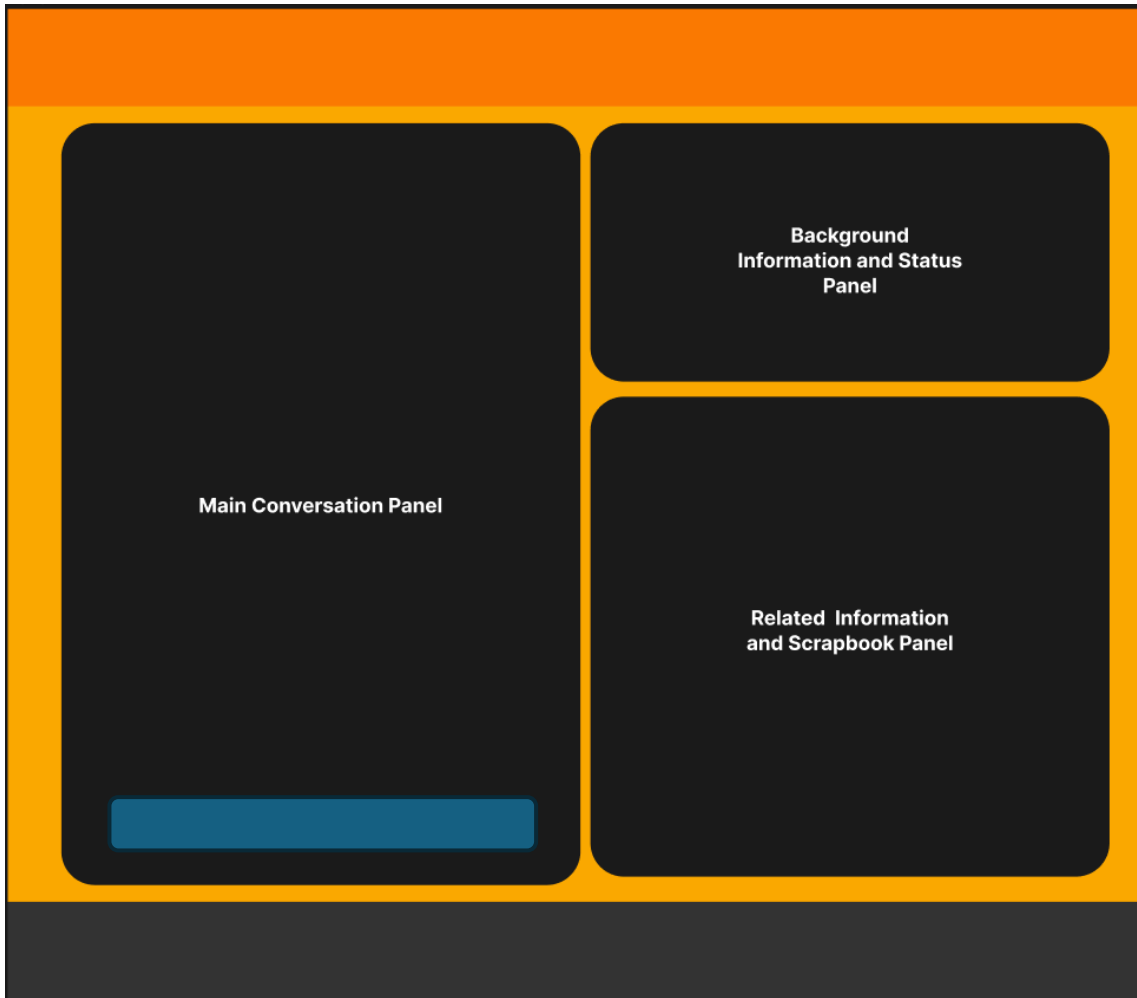
Design styles will be validated by user research and data

Design Patterns Choices

- A three-panel design with automatic content strategy can serve well in both, traditional and AI design
- It can be easily implemented in both systems
- We can also implement this design to a content reused from traditional version of the website



Pattern for AI Version



- Interaction in AI is focused on conversation which is performed in the Main Panel
- Background Information is related to the topic of ongoing conversation to give it a context
- Scrapbook Panel is a temporary storage of visualizations being discussed in the conversation
- Everything is resizable to customize experience

Dashboard Interaction Patterns

- Each card can serve as a button
- When pressed content in all panels will change to focus on choices and we switch from dashboard mode to data analytics mode
- Conversation about chosen visualization will be triggered
- Conversation design will be text based with other interaction elements inserted to support best user experience



Analytics Interaction Patterns



- User pressed one of the data visualization cards
- The same visualization becomes a focal point of conversation
- Related Data panel is populated with background data
- At the same visualization is also displayed in the Scrapbook panel. This way it is always in-view when the conversation scrolls
- User can interact with the chart via text or interaction with the content
- At any point user can return to the dashboard

Everybody benefits

Research based on data

- Real Data Analytics
- Real Users
- Real Data

Design based on research

- Refinement and validation
- Iterative design
- Ability to pivot

Development based testing

- Refinement and validation
- Early problem identification
- Ability to pivot



LLM Development

- Beta users
- Training Data
- Costs and usage estimates

Product

- Gradual exposure
- Good alignment with business objective
- Early validation of ideas

Other Teams can engage early and prepare

- Marketing and Sales
- Security
- Legal
- Branding
- Infrastructure and Technology

Designing Forum Experience

- We still have time to build it
- We have data analytics part done by Matt
- We have benchmarking visualizations done by Chris
- We have enough data from research to find related KPI
- Conversation design would be written as a guided tour through the features and functionality
- It would be combined with user research and website analytics
- Research could be set up “dress to impress” with eye tracking and cameras followed by AI based survey
- Research session would be displayed to the audience on a large monitor outside the booth
- We could brand it as Forum Labs to limit product and sales team exposure

Imagine

- A nice-looking Data Compass booth
- User is invited to sit down in the front of the computer and has conversation with AI
- While s/he is doing it, her screen and eye tracking are displayed on the large screen outside the booth where a group of Fiserv clients are watching
- Clients are signing up for Beta testing



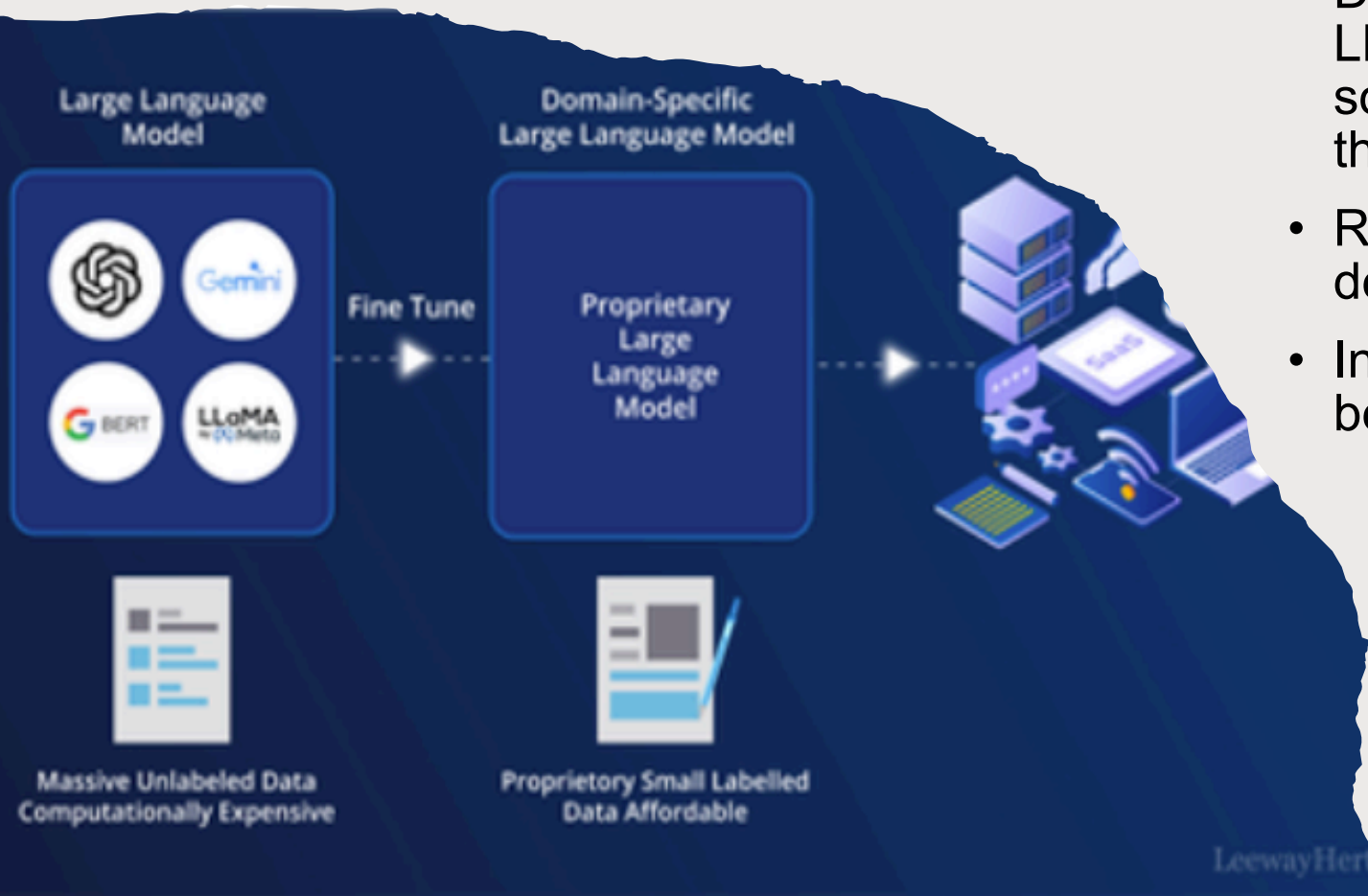
Prototype
look and
feel



Long Term AI Strategy

Discuss early with Mark Rind

- Add features
- Add voice
- Add personal dashboard generation based on usage and data
- Decide on infrastructure (inhouse LLM seems like a cost-effective solution at least for the first version that addresses security)
- Revenue models need to be developed
- In about a year from now we should be ready to start a switch to LLM OS



Immediate needs



Approve or refine UX strategy for the project and present to Mark and Product Teams



Solve the data visualization problem and approve direction



Based on approved strategy, create a project management plan with a clear delivery schedule. Review with product teams



Present AI prototype needs and solutions to Mark and if approved, review with AI and Data teams



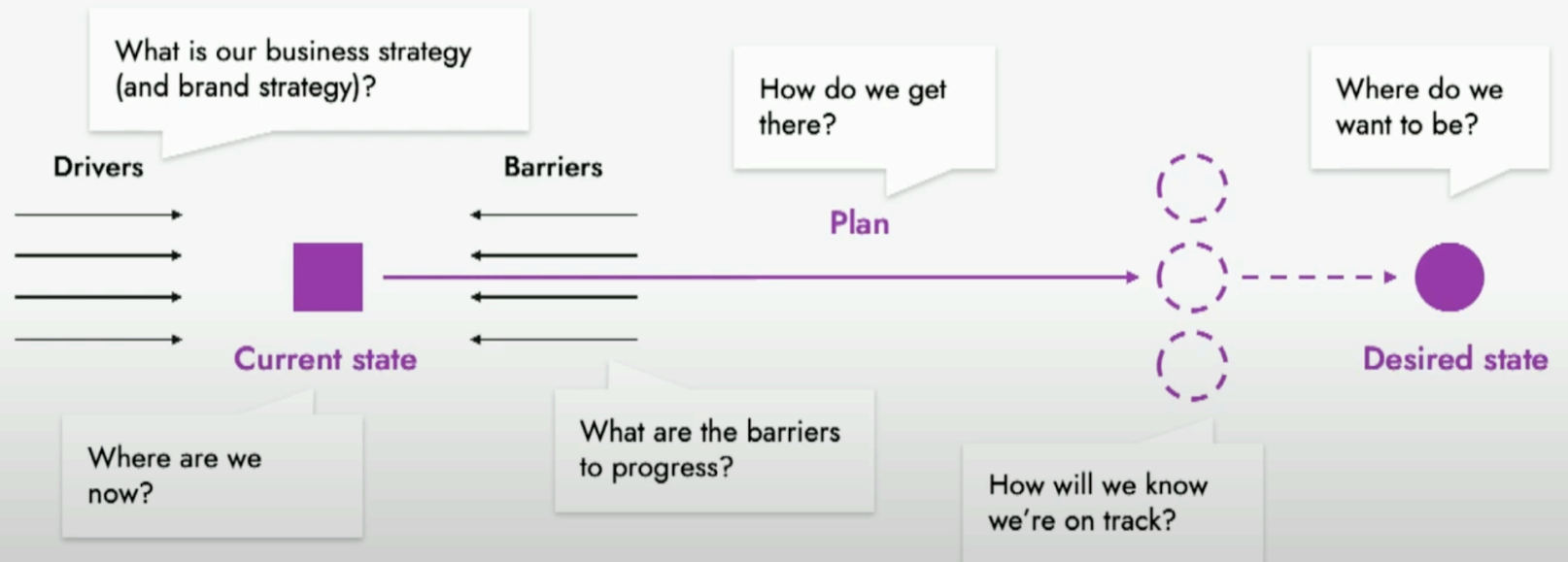
Start working on the prototype ASAP



If more help is needed

If you want, I can arrange a call with Jaime Levy, she offered to talk to you, maybe we can organize a webinar for product teams? Or just to talk

What goes into a strategy?





Let's start making beautiful things

In a professional way, using methodologies proper to the task

Every time there is a disruption we have a chance to change a lot of things – now is such a moment

Let's not repeat mistakes of the past, this year we can make it perfect

Let's make Fiserv proud and Product Design Team a group that everybody wants to collaborate with

Additional Issues

Who is the leader of this group? Klaus claims it's not Deepak and me talking to you will have no effect on the project. Do I really waste my time trying to bring up quality and standards?

UX Strategy next steps – refine and present to Mark Rind

This attitude (“it’s not my problem”) of passing a blame to other teams and people needs to end. Everybody is responsible for quality

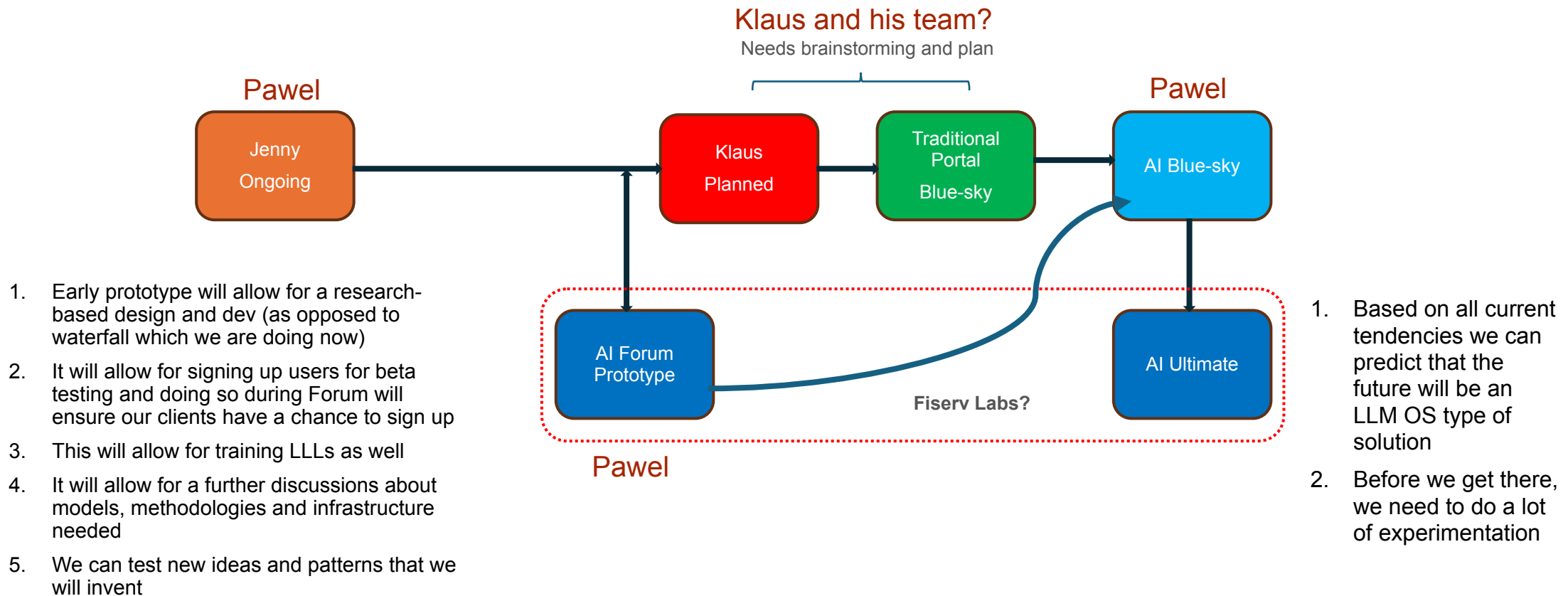
Problems with showing too early and how to remedy it – after strategy is accepted it will be easy to schedule presentations, especially if we abandon Waterfall model

I need help with Klaus, he is extremely difficult to collaborate with, maybe I can focus on helping Jenny with current situation and developing AI prototype, while Klaus and his team pursue their current goal?

This is a serious issue and it’s very hard to get things done
A lot of resources and time is wasted and quality drops

Where are we?

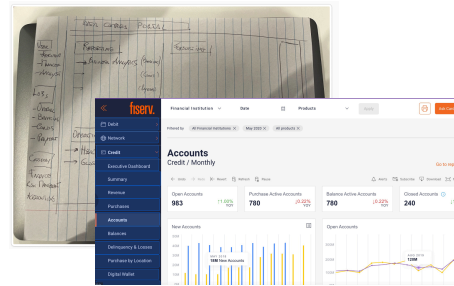
We need an approved UX Strategy!



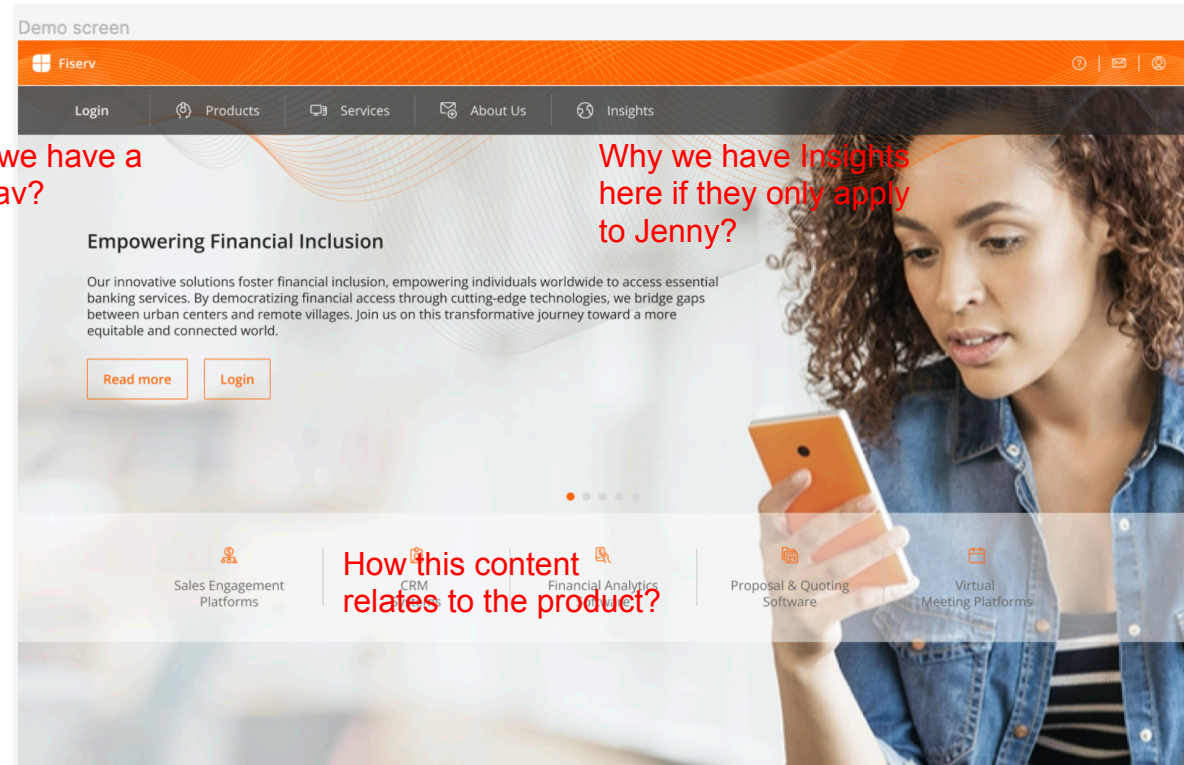
Where are we?

Klaus
Planned

There is no clear strategy where we go in this process (team's opinion), we are also showing this to larger teams without internal review, prematurely. Design exercise is being done with ignoring all previous work and without doing required preparation (e.g. competitive analysis, review of related products, etc.)



Why don't we have anything about DataCompass on this page?



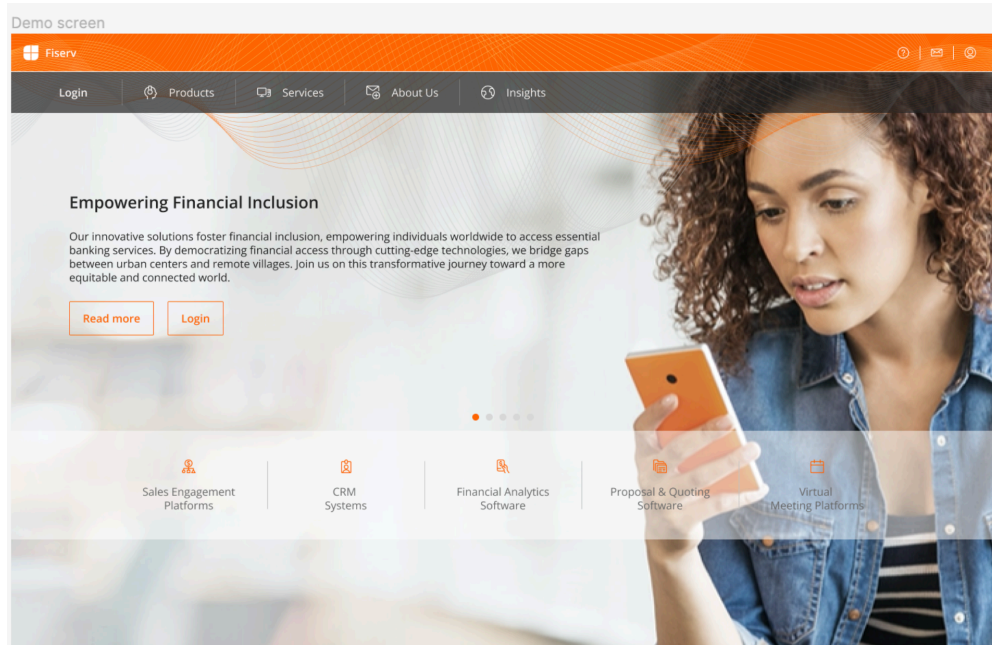
Why we have a subnav?

Why we have Insights here if they only apply to Jenny?

How this content relates to the product?

This design strategy is the riskiest as it carries all risks of AI without its benefits, additionally because of the proposed implementation of AI, should something happen, the site would be unusable

Where are we?



We can't use AI as a main technology - this must work if AI is down

Klaus
Planned

This version is not the portal design, you can't access individual product dashboard because it doesn't exist in this version

1. We are starting the design from modeling some flow based on one product which is not the most efficient way of doing it. This is a third direction change in the last three weeks
2. We should start with identifying common patterns between products and, in addition, on competitive analysis
3. First, it would be good to design some common structure that can be applied to all products
4. There is no UX strategy, how to get from Jenny to Klaus. There is no explanation about the process
5. We should strive to organize the work in a way that maximizes reuse of Jenny's work in this final project

How Klaus's team works

- Everybody is waiting for flows – already 3 months
- In the meantime, they could start designing structure and interactions
- That means starting with competitive analysis and product review while Neal completes his work
- Also, parts of this projects can be done indecently from each other

