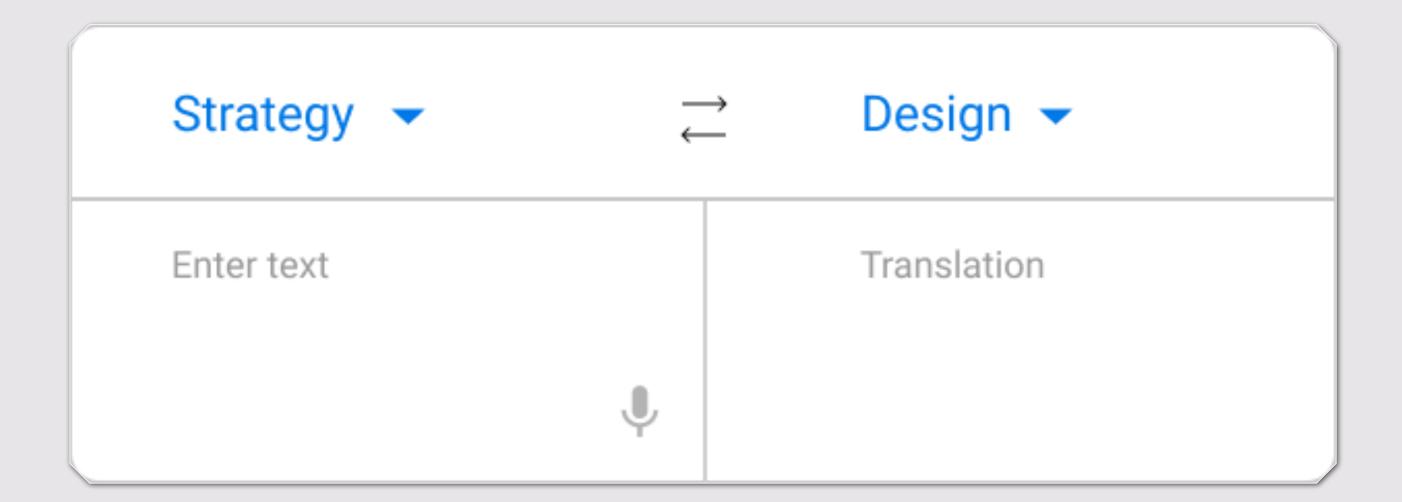
### **MIAMI AD SCHOOL**

### Translate:



HI, MY NAME IS...

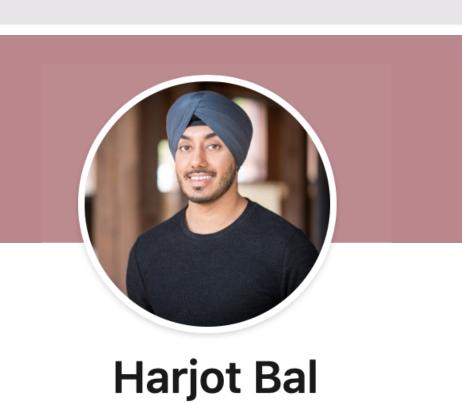
### Harjot.

HI, MY NAME IS...

### Harjot.







CX & UX | Product & Service Design | Research & Strategy | DesignOps & Design Systems

HI, MY NAME IS...

### Harjot. What's yours?

### **TRUE OR FALSE:**

### Research informs strategy, and strategy informs design.

#### TRUE OR FALSE:

## Research informs strategy, and strategy informs design.

False.

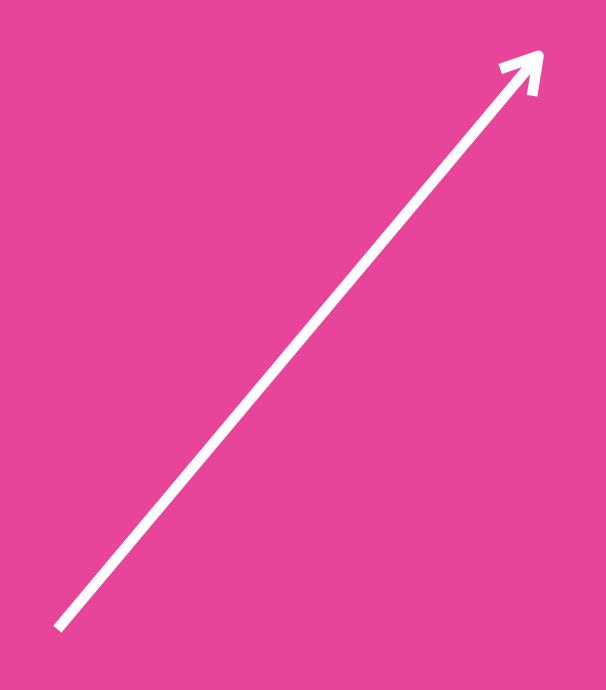
#### **TRUE OR FALSE:**

Research informs strategy, and strategy informs design.

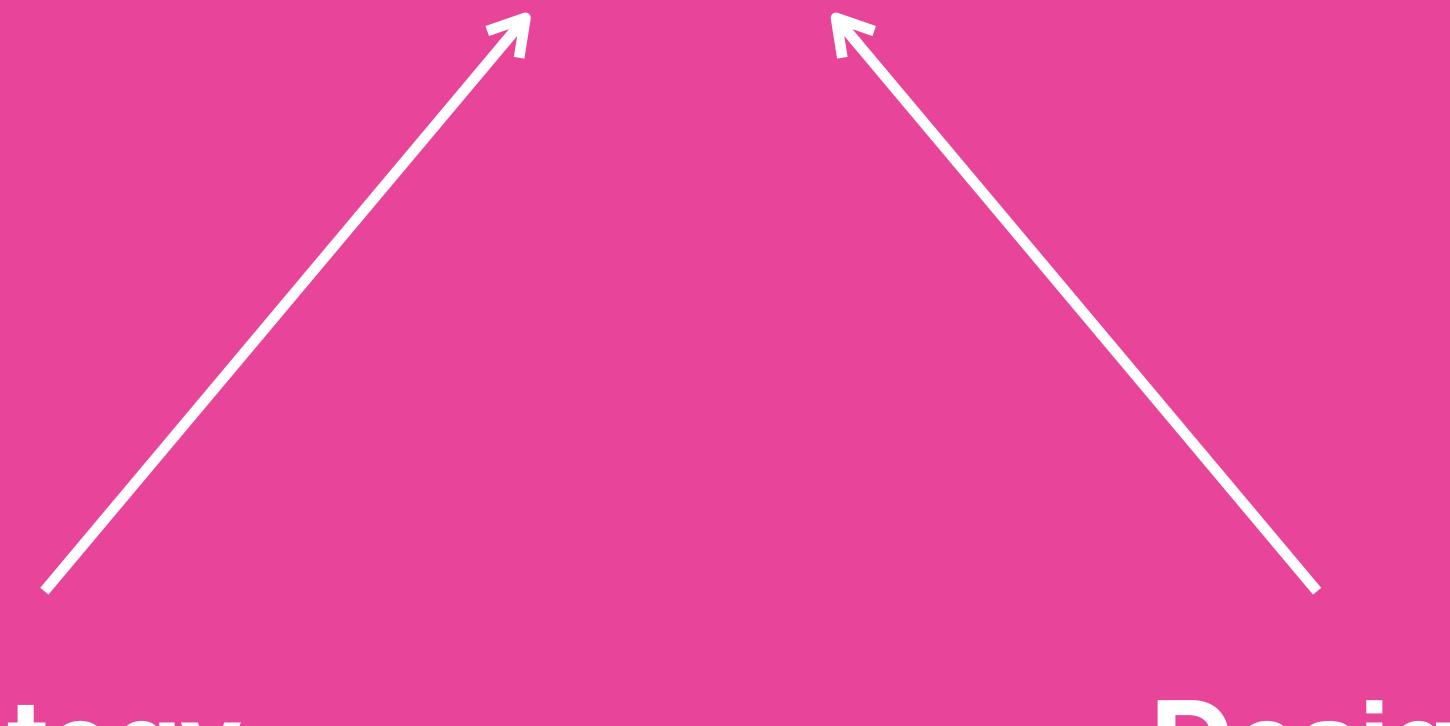
False.

Research is a continuous, shared responsibility.

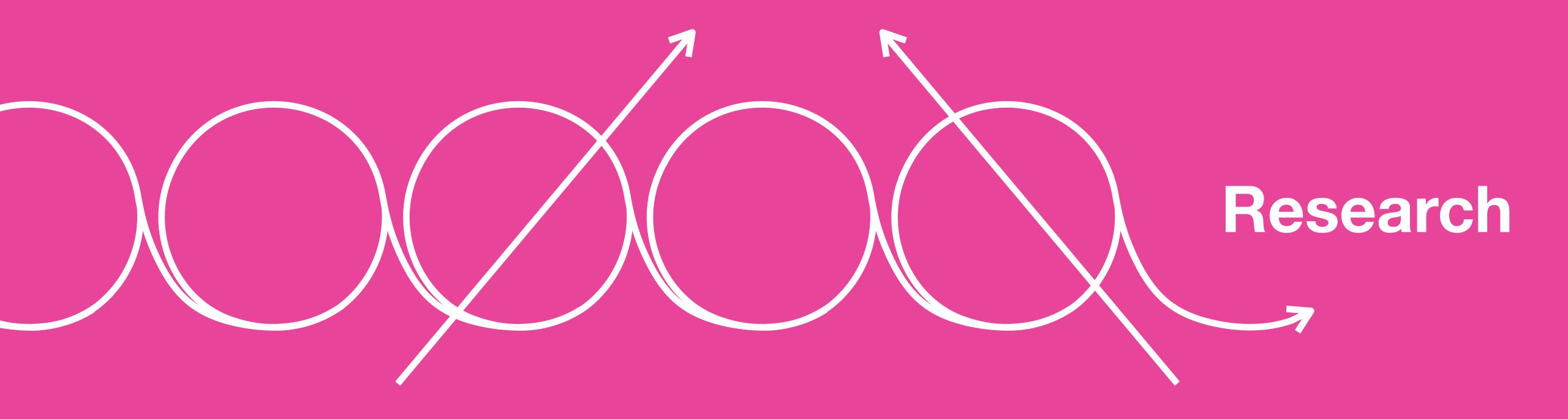




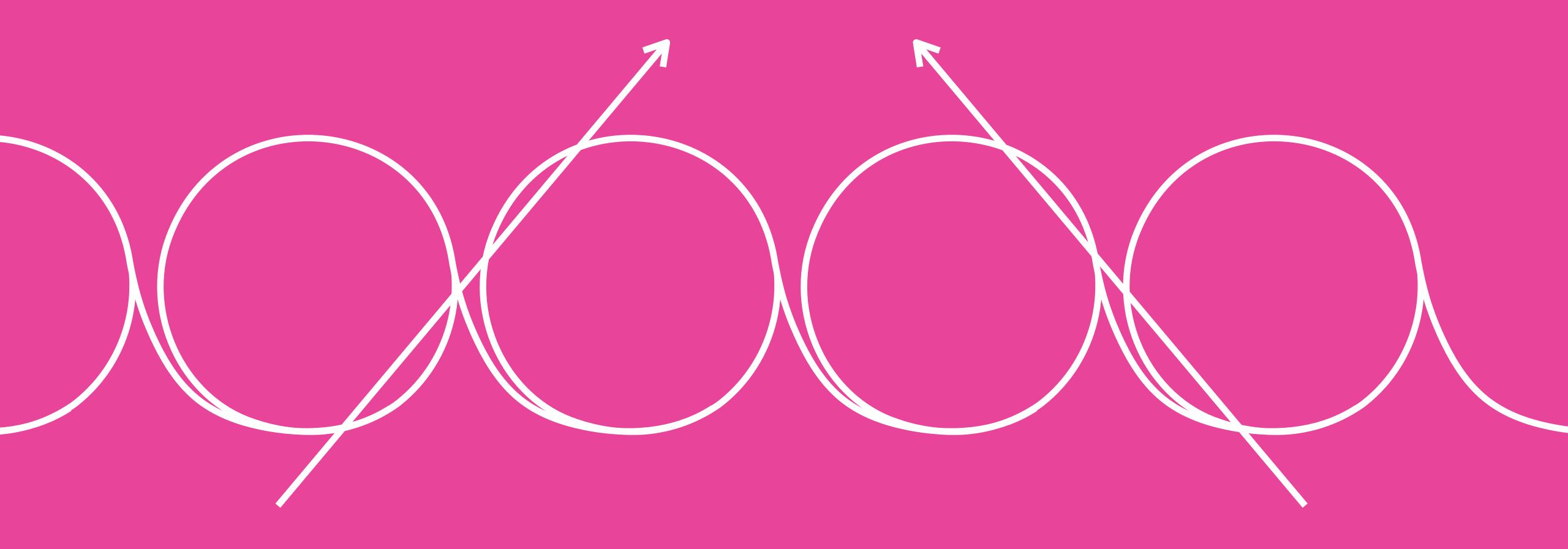
Strategy



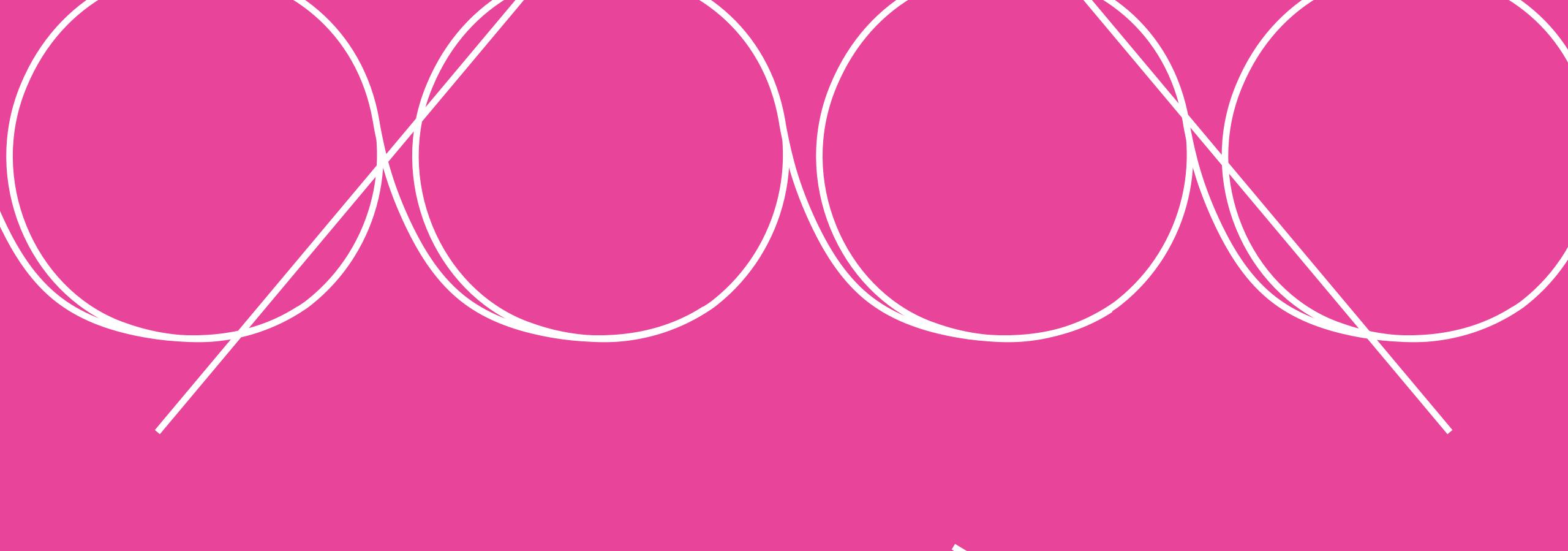
Strategy

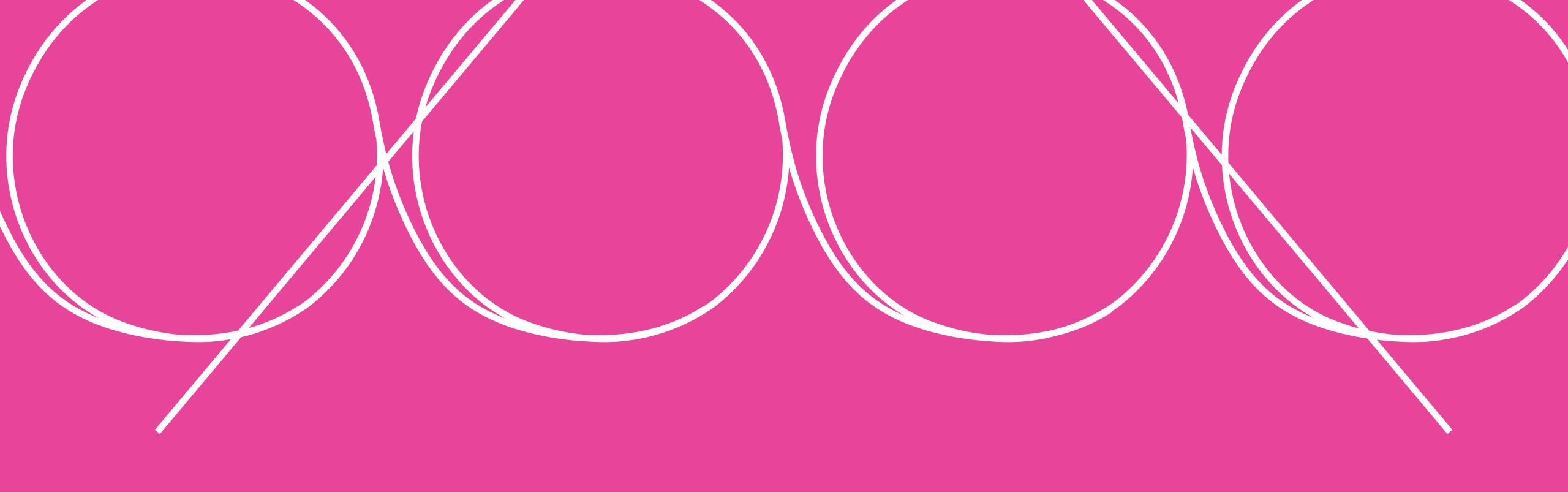


Strategy

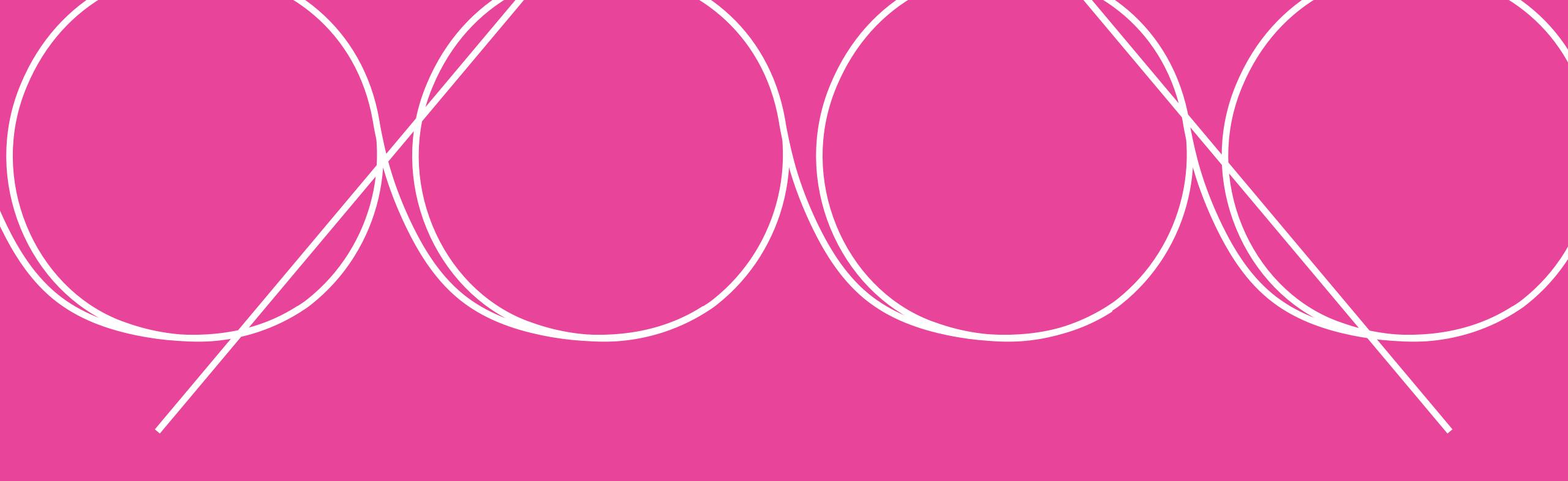




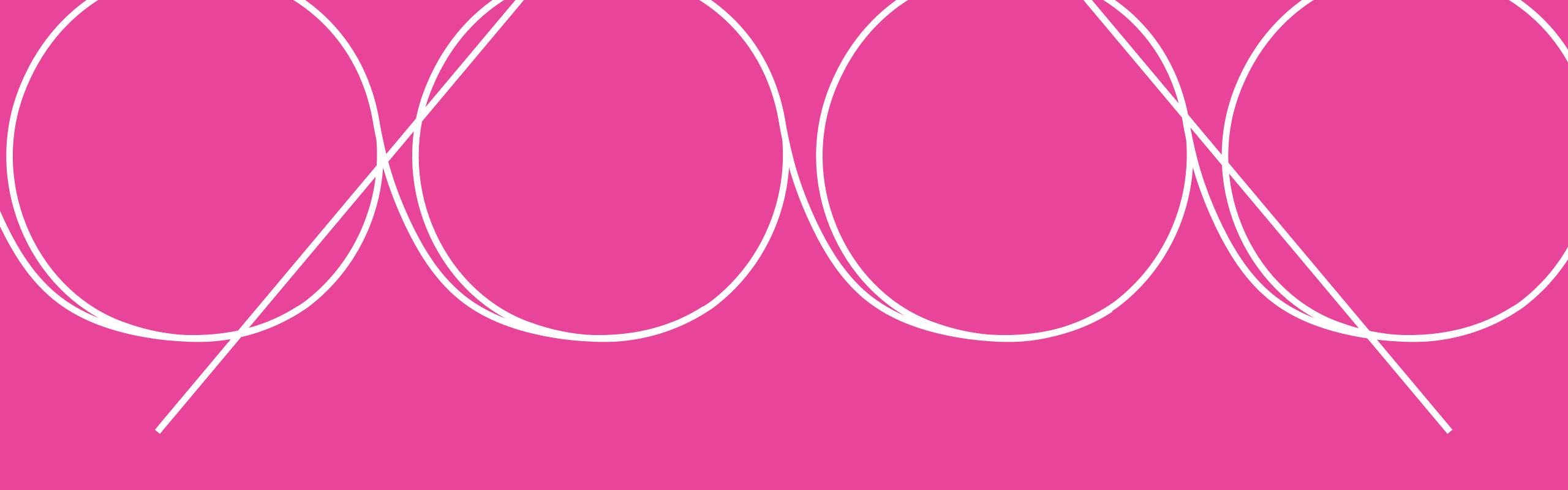




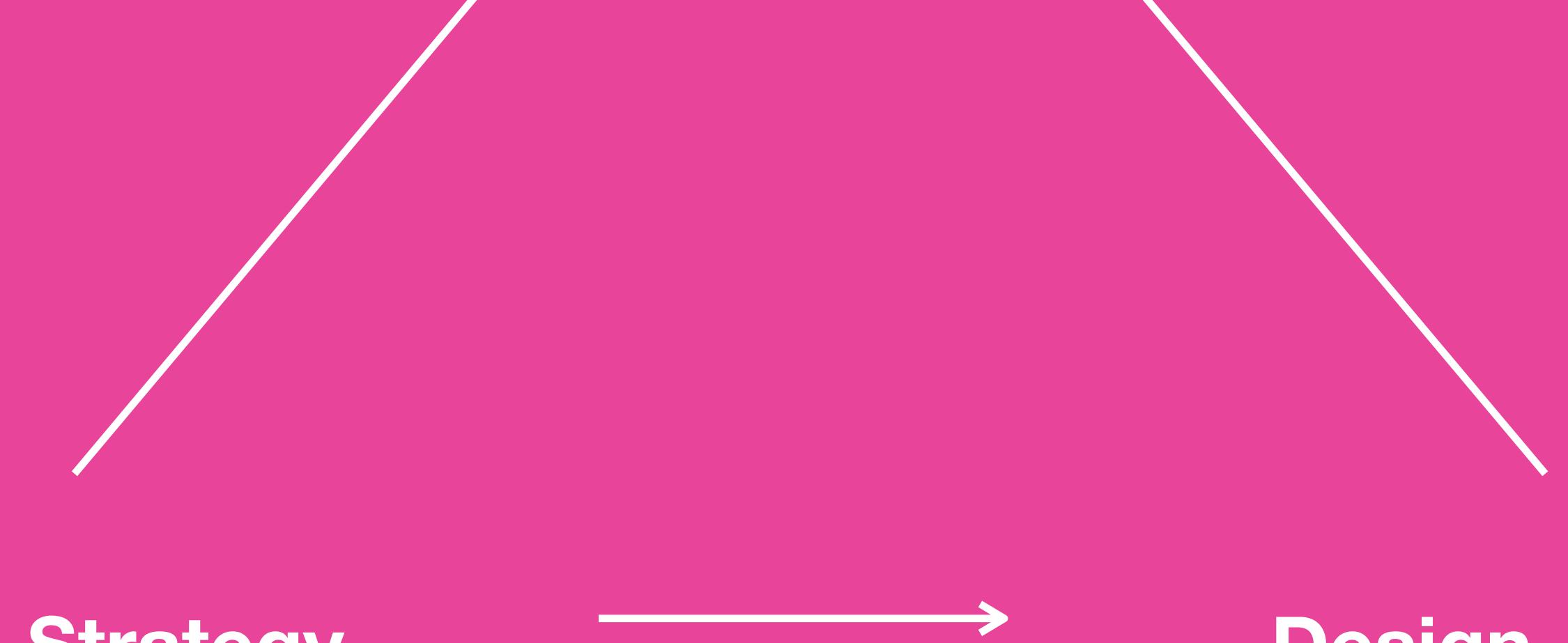










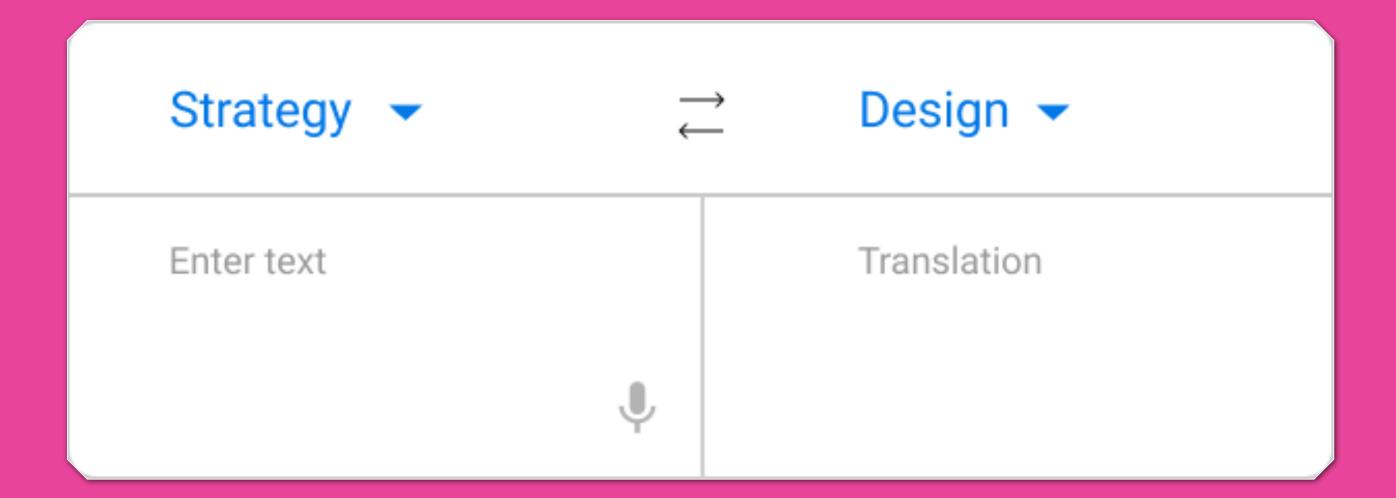


### Translate:

Strategy



### Translate:



### **ON TONIGHT**

1

Take it in

5 pillars of discovery

Insights

The brief

2

Take to it

Make it efficient-er

Use the use case

Get wild

3

Take it away

Things to consider

Resources

FYI

### Art Direction and Design are different.

FYI

### Art Direction and Design are different. Art Direction is the concept.

# Art Direction and Design are different. Art Direction is the concept. Design is the implementation.

**FYI** 

Art Direction and Design are different.
Art Direction is the concept.
Design is the implementation.
Today, we'll focus *mostly* on Design.

### 1. Take it in

### 5 pillars of discovery

### 5 pillars of discovery What the business needs

# 5 pillars of discovery What the business needs Who the audience is

# 5 pillars of discovery What the business needs Who the audience is What the audience needs

5 pillars of discovery
What the business needs
Who the audience is
What the audience needs
The state of the brand

5 pillars of discovery What the business needs Who the audience is What the audience needs The state of the brand What others are doing

# 5 pillars of discovery What the business needs +

What's involved?	Why?
Requirements or stakeholder needs	<ul> <li>To draw lines in the sand</li> <li>Content, features, or standards that are a must for the business to achieve</li> <li>Examples: Multi-language support, achieve AA accessibility</li> </ul>
KPIs and success metrics	<ul> <li>To know what to prioritize</li> <li>Benchmarks (based on data) established to measure success and conversion</li> <li>Examples: Reduced drop-off rates, increased newsletter subscription</li> </ul>
Strategic vision	To understand where the ship is headed  The direction in which the business wants to move based on perception or operation  Example: To become the Apple of the ABC industry by doing XYZ

# 5 pillars of discovery Who the audience is +

What's involved?	Why?	
Demographics and audience segmentation	<ul> <li>To understand who is and isn't represented</li> <li>Data driven insights that compare personas and their consumption habits to the global and local population</li> </ul>	
Personas or archetypes	To know who we're talking to  These are the people that we want to design for  These are the people we will measure our success through	
Target audience planning	To understand if and how the audience will change  • Ways to extend or shift our reach over the short- or long-term	

## 5 pillars of discovery What the audience needs $\leftarrow$

What's involved?	Why?
Stakeholder and user interviews	<ul> <li>To understand how personas feel about the existing system</li> <li>Qualitative insights that allow personas to reflect on their experiences of the current state of affairs</li> </ul>
Feature and content audits	<ul> <li>To understand the utility and messaging that personas need or want</li> <li>The core content that brings users to the experience</li> <li>Examples: Virtual tours, waitlist notifications, inventory comparisons</li> </ul>
Maps, flows, and analytics tracking	To understand how personas move within the existing system  • Quantitative and qualitative insights on how the UX supports personas' needs  • Examples: Signing in, checking out, checking order status

## 5 pillars of discovery The state of the brand +

What's involved?	Why?			
Brand purpose, vision, and mission	To align on what the brand stands for  • Establishing a point of view and fulfilling a promise			
Brand personality traits	To bring the brand to life  • Allowing the brand to be recognized, respected, and remembered			
Documentation download (guides for brand, design, imagery, content, etc.)	To exercise the brand at a more tangible level  • Understanding how the brand attributes and characteristics manifest in the design of online and offline touchpoints			

## 5 pillars of discovery What others are doing 4

What's involved?	Why?			
Competitive and landscape analysis	<ul> <li>To evaluate how we measure up</li> <li>A look at what's working and what's not working across best-in-class experiences, both in and out of industry</li> </ul>			
Best practice guidelines	To work with established standards  • A set of tried-and-tested approaches for a particular industry or space			
SME checklist	<ul> <li>To be compliant with category-specific mechanics</li> <li>Features and functions that are mandatory and legally crucial to our success</li> <li>Example: Users must be able to review and confirm their order before completing payment transactions</li> </ul>			

## 5 pillars of discovery Once more, with feeling.

What the business needs	Who the audience is	What the audience needs	The state of the brand	What others are doing
Requirements or stakeholder needs	Demographics and audience segmentation	Stakeholder and user interviews	Brand purpose, vision and mission	Competitive and landscape analysis
KPIs and success metrics	Personas or archetypes	Feature and content audits	Brand personality traits	Best practice guidelines
Strategic vision	Target audience planning	Maps, flows, and analytics tracking	Documentation download (guides for brand, design, imagery, content, etc.)	SME checklist

### OK. Discovery = discovered.

### OK. Discovery = discovered. Now what?



finding

finding

finding

finding

finding

Discovery

finding

finding insight

finding —> insight

finding insight

finding

Discovery

**Synthesis** 

finding
finding
insight

finding ——> insight ——> Brief.

finding insight

finding

Discovery Synthesis Direction

finding

finding insight

finding ---> insight ---> Brief.

finding insight

finding

**Synthesis** 

Direction

Discovery

### Insights

## Insights They tell us why.

## Insights They tell us why. Findings are reinforced observations.

# Insights They tell us why. Findings are reinforced observations. Insights are penetrating reasons for why findings are...found.

**Observation:** Women say they don't like most beauty product ads.

1. TAKE IT II

Why?

Insig
They
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Insig

findi

Insight: Because they portray women who do not look like 95 percent of women.

Idea: Dove Real Beauty



s. 'why

Reference The insight: the most important part of the brief

finding insight

finding → insight → Brief.

finding insight

finding

Discovery

Synthesis

Direction

### The brief

### The brief Sets the foundation.

## The brief Sets the foundation. Allows for feedback.

# The brief Sets the foundation. Allows for feedback. Aligns expectations.

### The brief.

Vision Audiences References

Objectives Key themes Metrics & KPIs

### I'M TIRED

### Intermission Take liiiiike 5-ish minutes.

### 2. Take to it

### How does Design start designing?

### How does Design start designing? Remember those insights?

How does Design start designing?
Remember those insights?
Time to start proposing ideas that address the insights through the lens of the brief.

2. TAKE TO

How Rem Time addr of th



### OK. Let's try some examples.

## OK. Let's try some examples. We'll look at web design.

OK. Let's try some examples. We'll look at web design. Examples that went through a few rounds of design to ensure that the strategic insights were maximized.

Designing experiences based on decks and reports isn't easy.

It's not prescriptive, nor should it be.

So...experiment!

### A. Make it efficient-er

# A. Make it efficient-er Example:

### A. Make it efficient-er

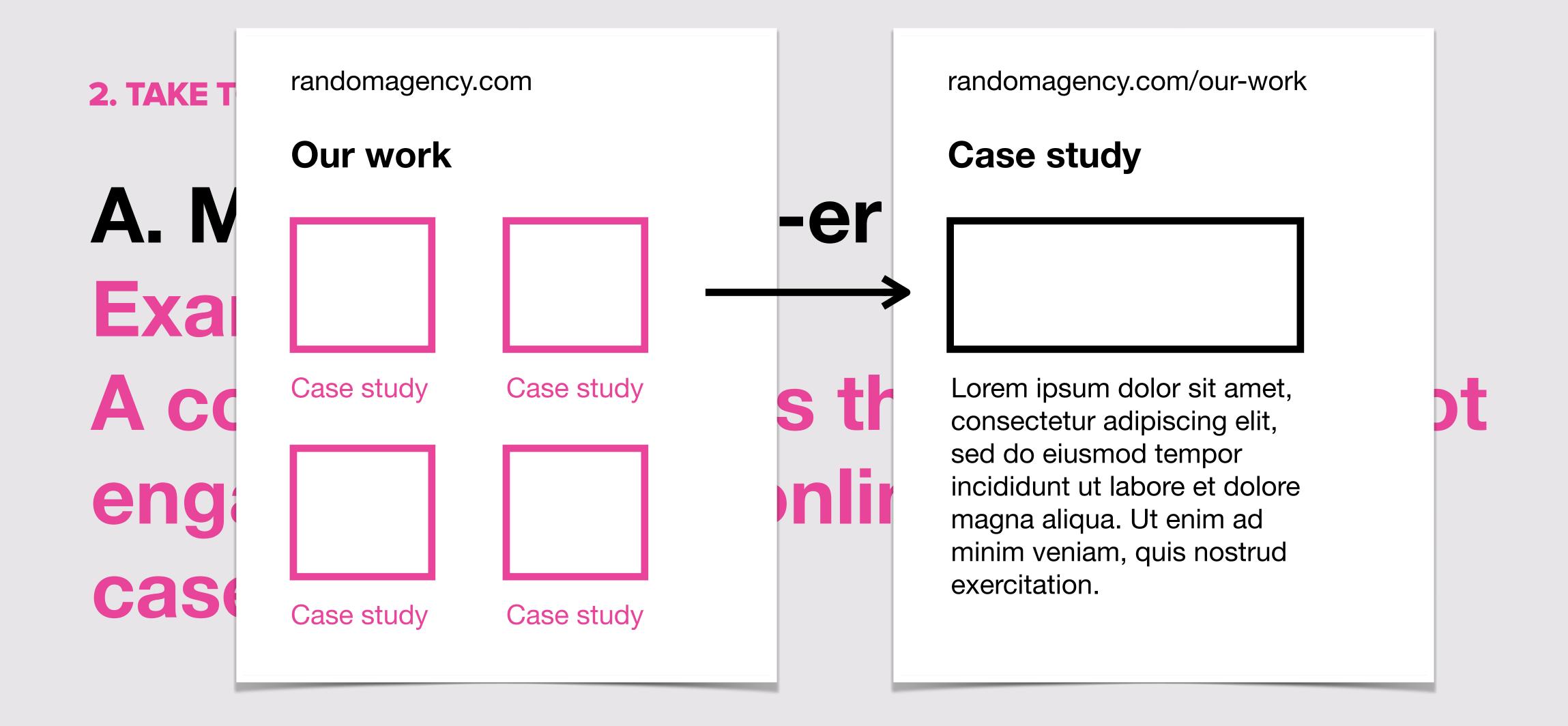
### Example:

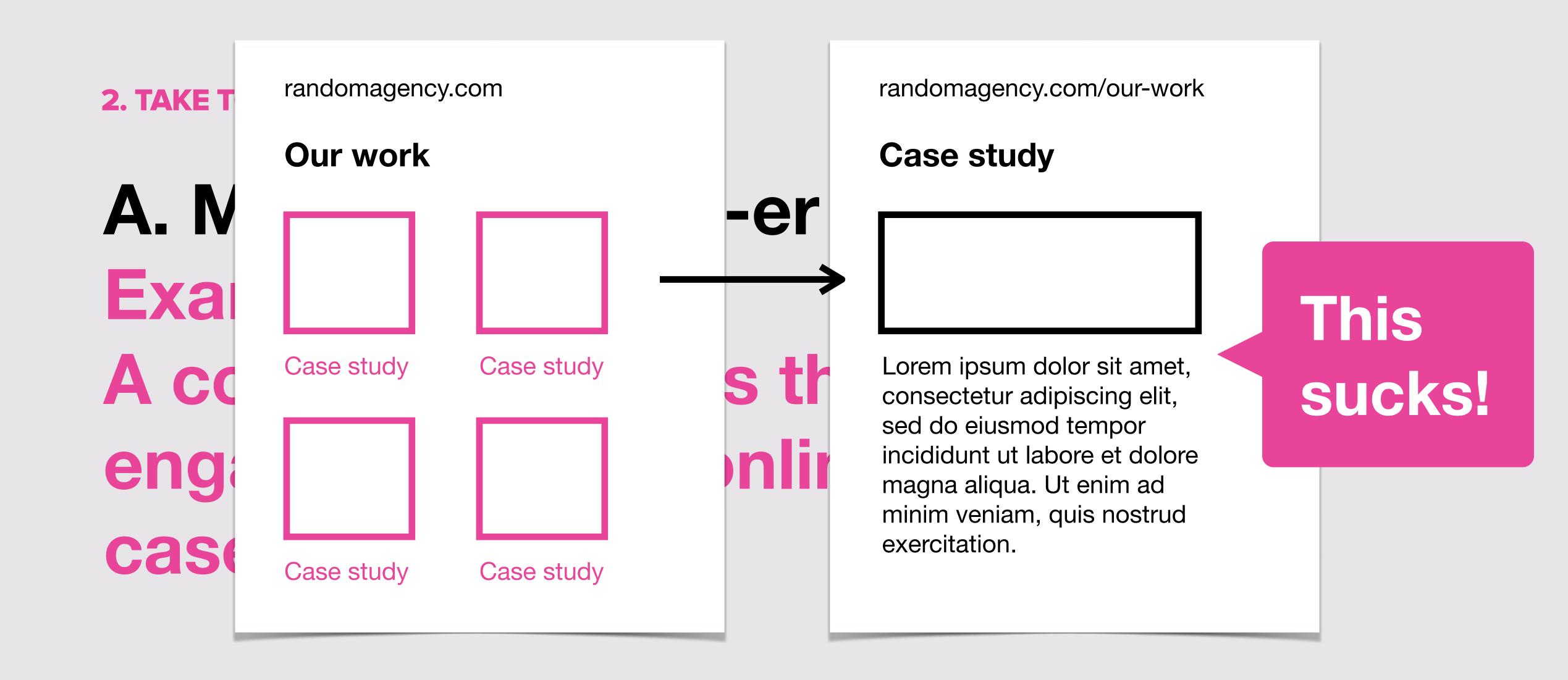
A consultancy finds that users are not engaging with its online portfolio of case studies as desired.

randomagency.com 2. TAKE T Our work A. N Exa Case study A CC Case study eng case Case study Case study

-er

s that users are not nline portfolio of sired.





# A. Make it efficient-er Insight:

### A. Make it efficient-er

### Insight:

Users landing on a case study grow frustrated in trying to figure out if the content is relevant for them to consume.

# A. Make it efficient-er More insights:

# A. Make it efficient-er More insights: Dense information doesn't allow users to quickly scan priority details:

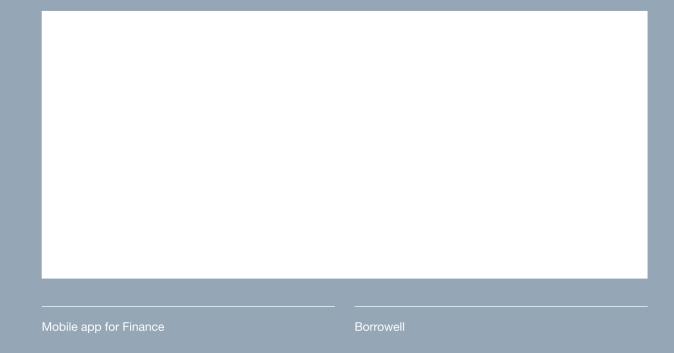
A. Make it efficient-er More insights: Dense information doesn't allow users to quickly scan priority details: Client? Problem? Output? Timeline? Location? Wins? Team?

## A. Make it efficient-er The first draft...



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#### What problem were we trying to solve?

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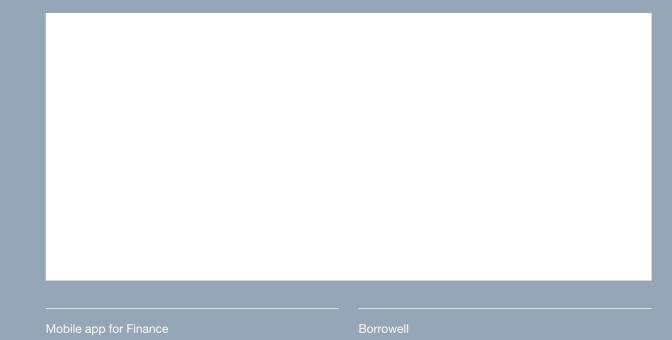
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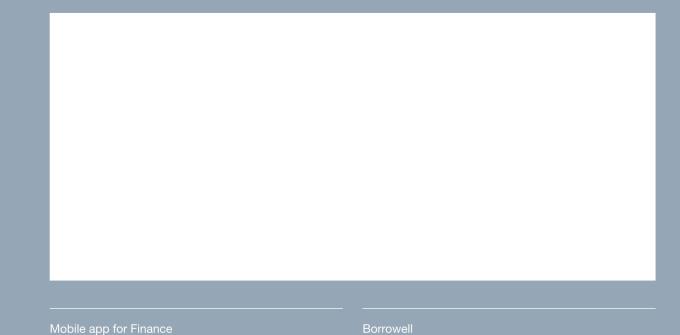
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#### Paragraph for gist

#### See the thing

#### Borrowell • Mobile app • Finance

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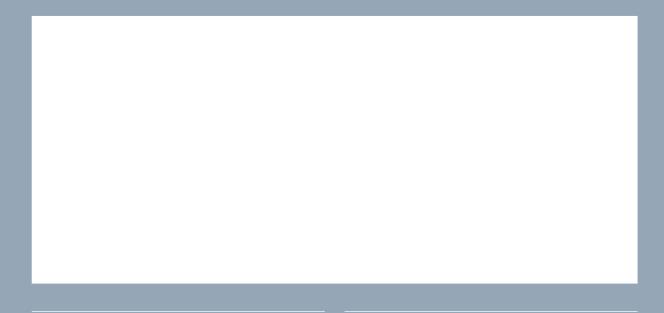
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Mobile app for Financ

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#### What problem were we trying to solve?

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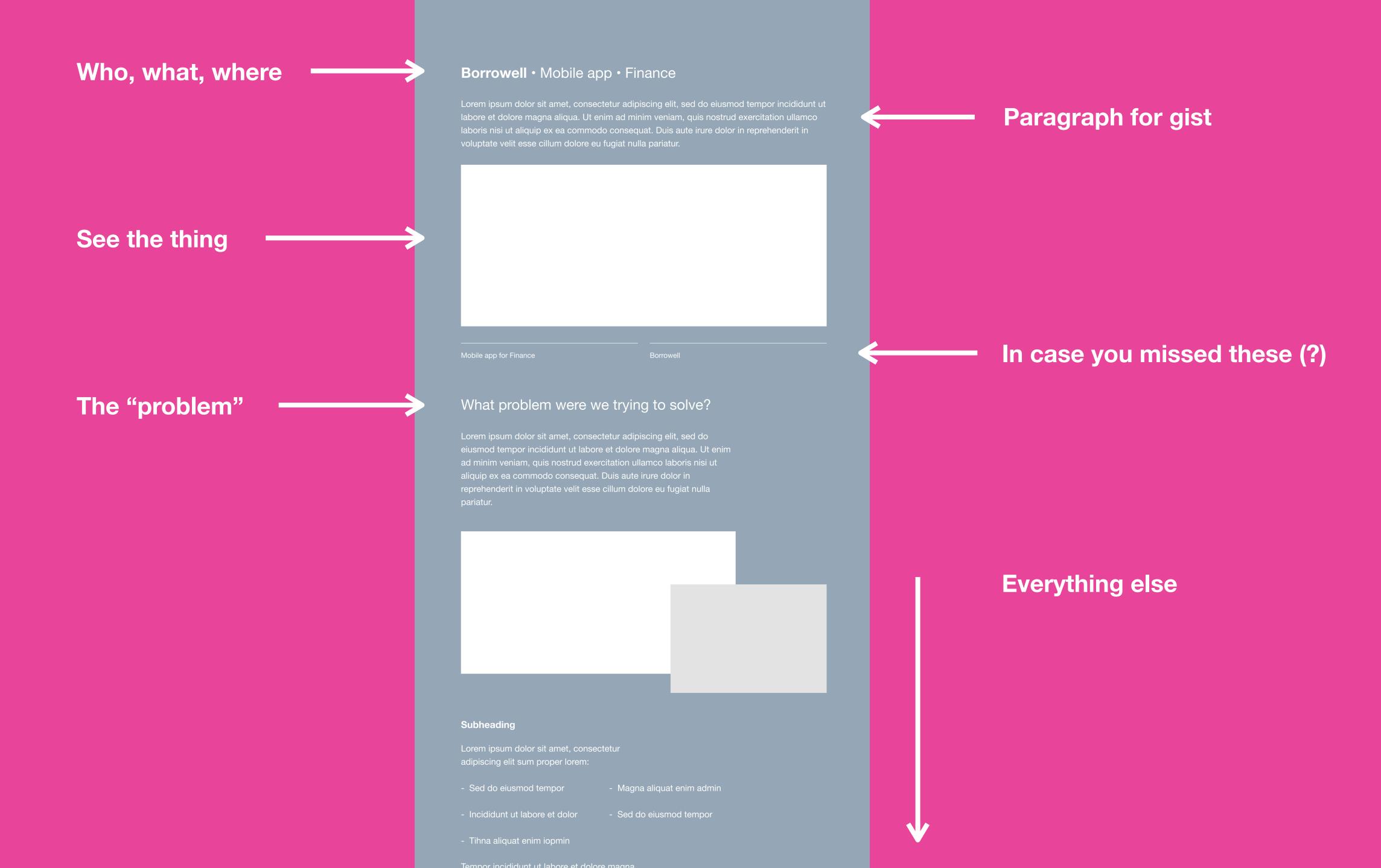
#### In case you missed these (?)

Paragraph for gist

### Who, what, where Borrowell • Mobile app • Finance Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco See the thing The "problem" What problem were we trying to solve? Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla

Paragraph for gist

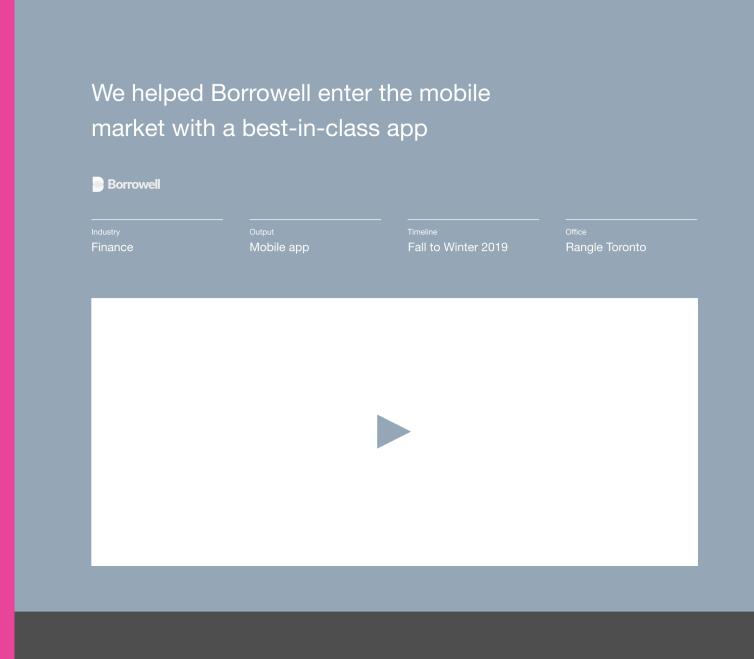
In case you missed these (?)



# A. Make it efficient-er Hmm. Try again?

# A. Make it efficient-er Hmm. Try again? Fiiiine \*groans in *Designer*\*





#### Highlights

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The outcome ↓

#### Core team



**Lidia Tavassoli**Program Director



Harjot Bal
Design Lead



Setareh Shams
Visual Designer

#### The challenge

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#### What we did

We helped Borrowell enter the mobile market with a best-in-class app



#### Highlights

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Jump to

The challenge  $\downarrow$ 

The process  $\downarrow$ 

The outcome  $\downarrow$ 

#### Core team



**Lidia Tavassoli**Program Director



Harjot Bal
Design Lead



Setareh Shame Visual Designer

Steven Szatala

Experience Designer



**Ankita Kulkarni**Solution Architect

#### The challenge

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#### What we did

Logo for recognition

We helped Borrowell enter the mobile market with a best-in-class app

Borrowell

Finance

<sub>itput</sub> Iobile app

all to Winter 2019

Rangle Toronto

#### Highlights

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Jump to

The challenge  $\downarrow$ 

The process  $\downarrow$ 

The outcome ↓

#### Core team



**Lidia Tavassoli**Program Director



**Harjot Bal**Design Lead



Setareh Shams
Visual Designer



Steven Szatala

Experience Designer



**Ankita Kulkarni**Solution Architect

#### The challenge

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Finance

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II to Winter 2019

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Jump to

The challenge  $\downarrow$ 

The process  $\downarrow$ 

The outcome ↓

#### Core team



**Lidia Tavassoli**Program Director



Harjot Bal Design Lead



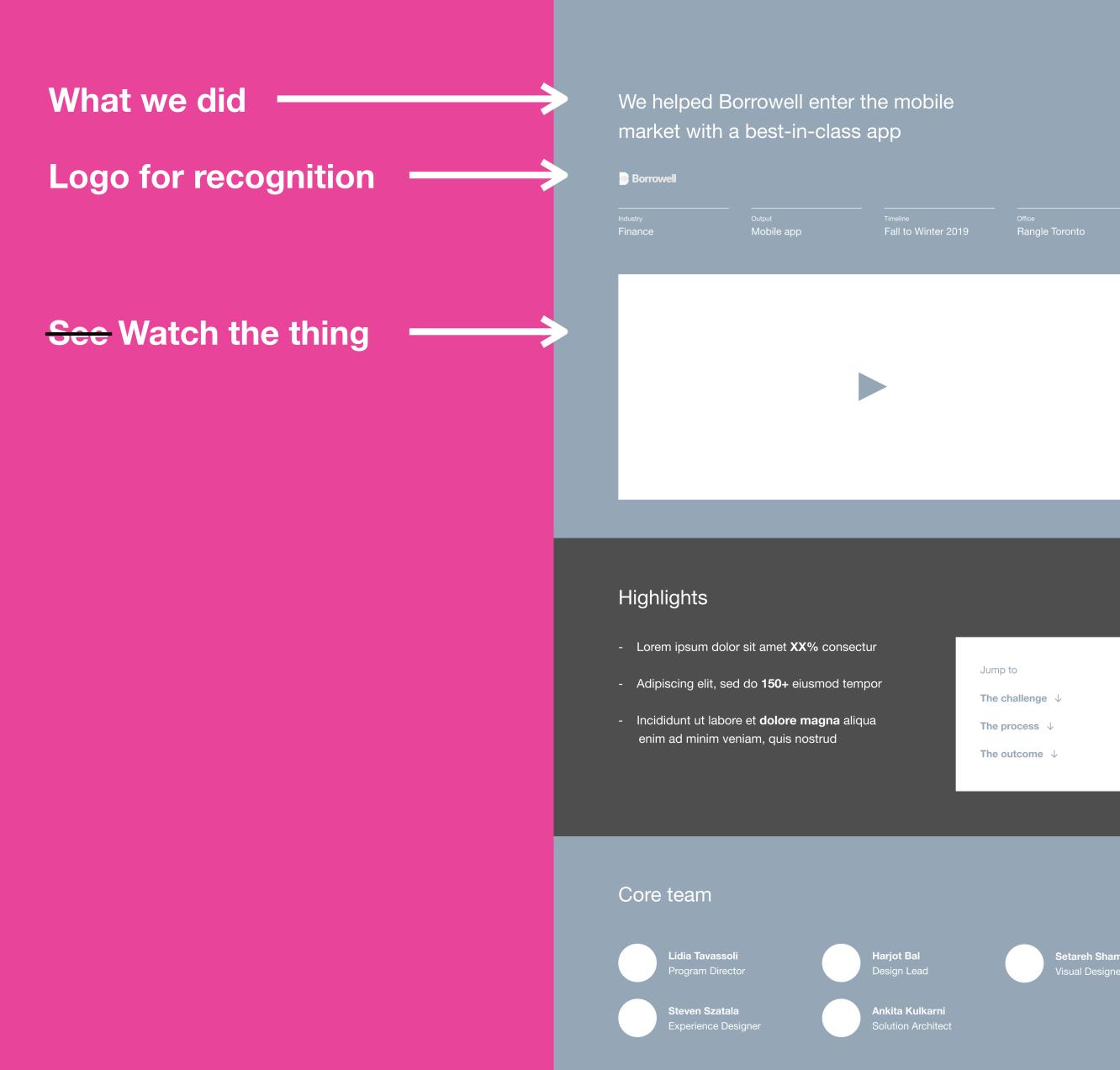
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Visual Designer

Ankita Kulkar Solution Archi

#### The challenge

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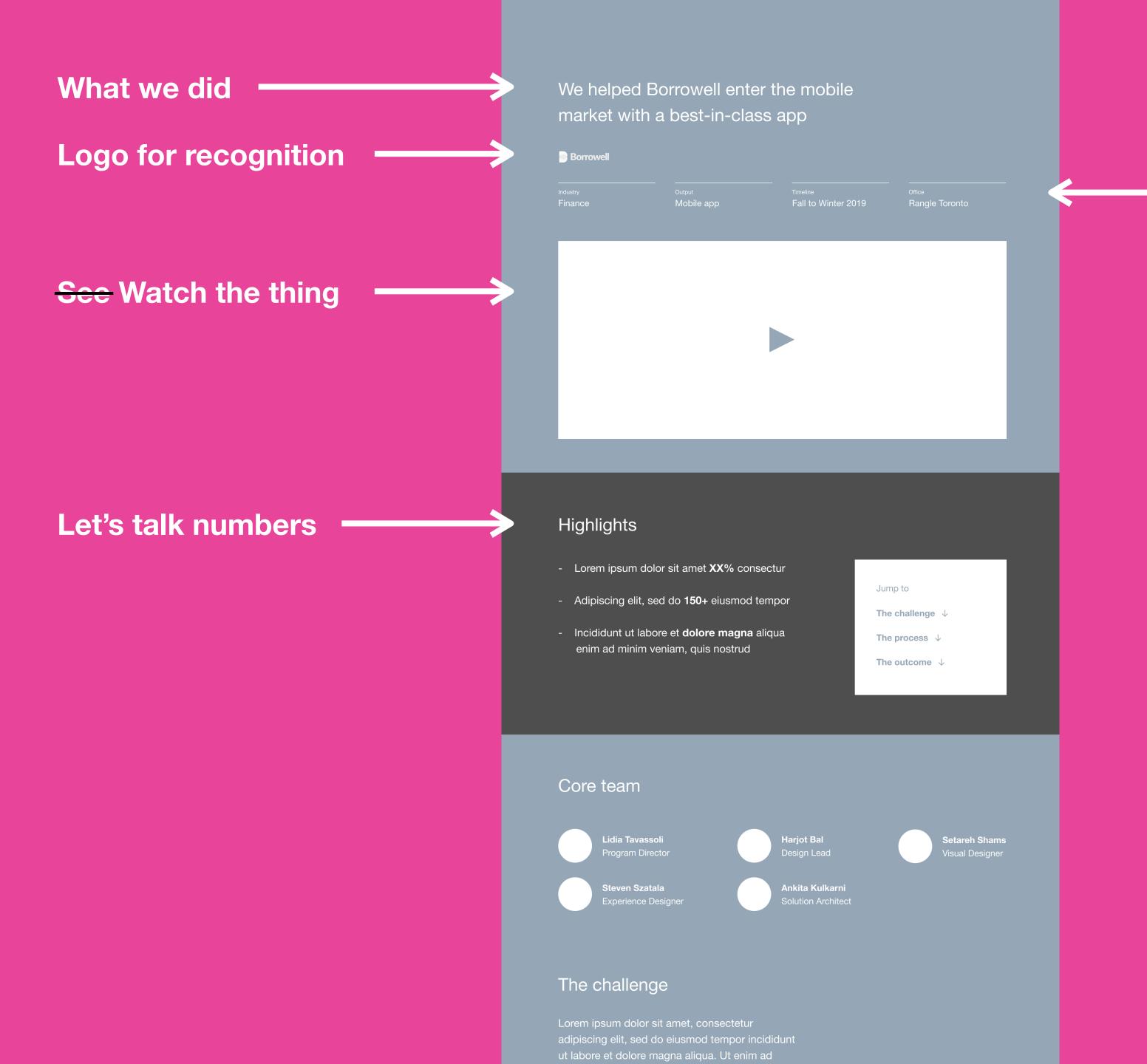
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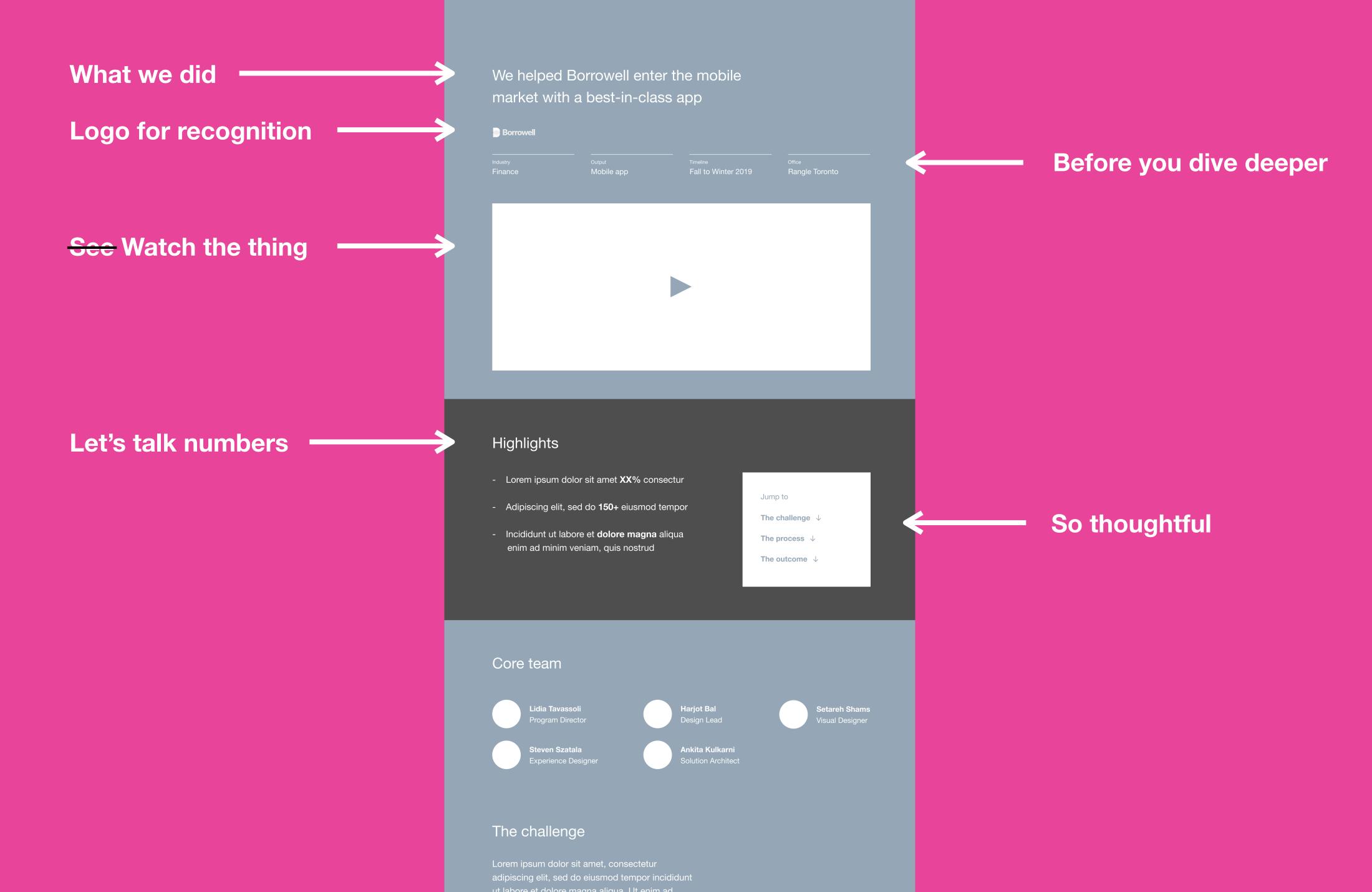
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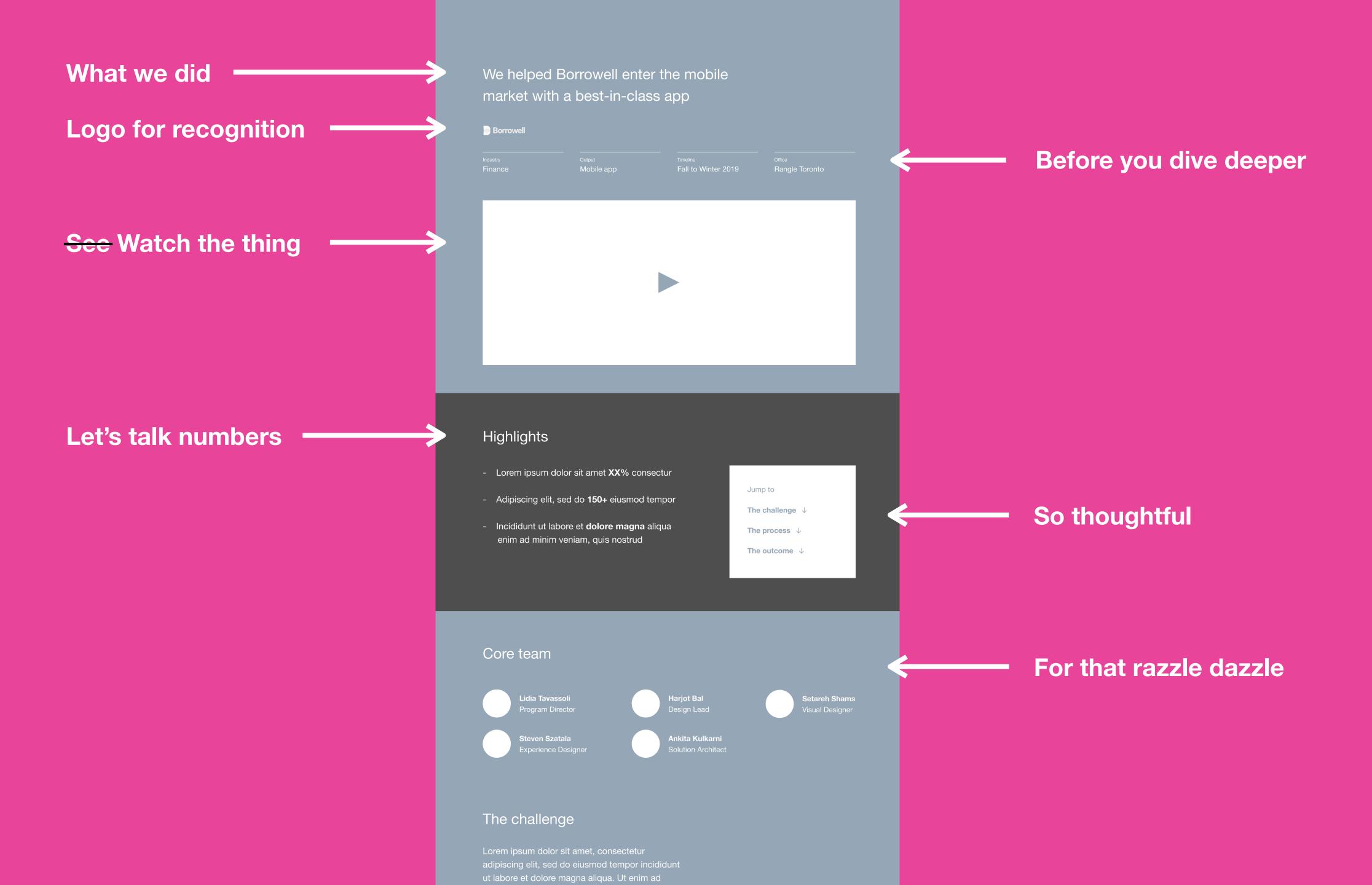
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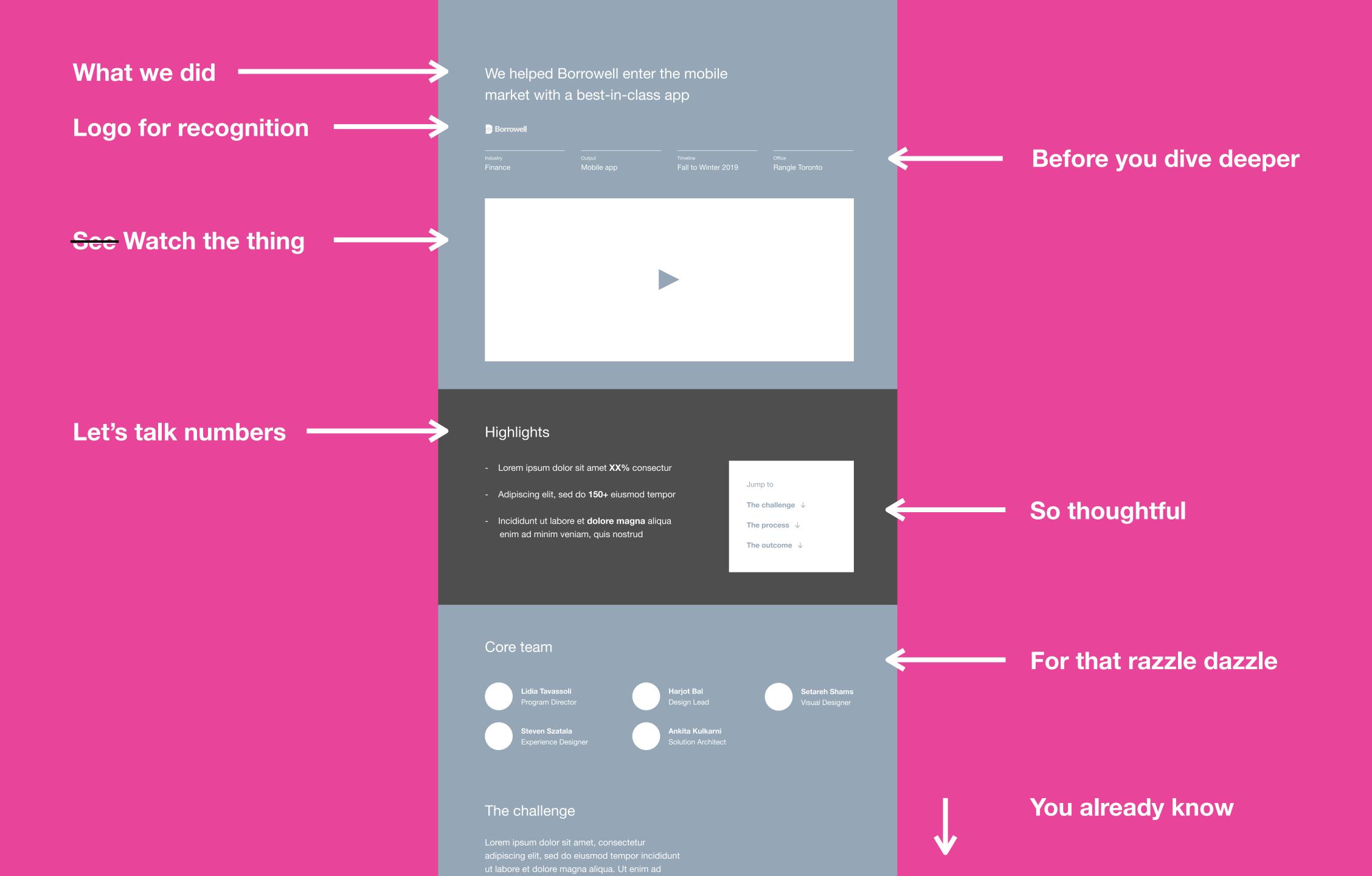
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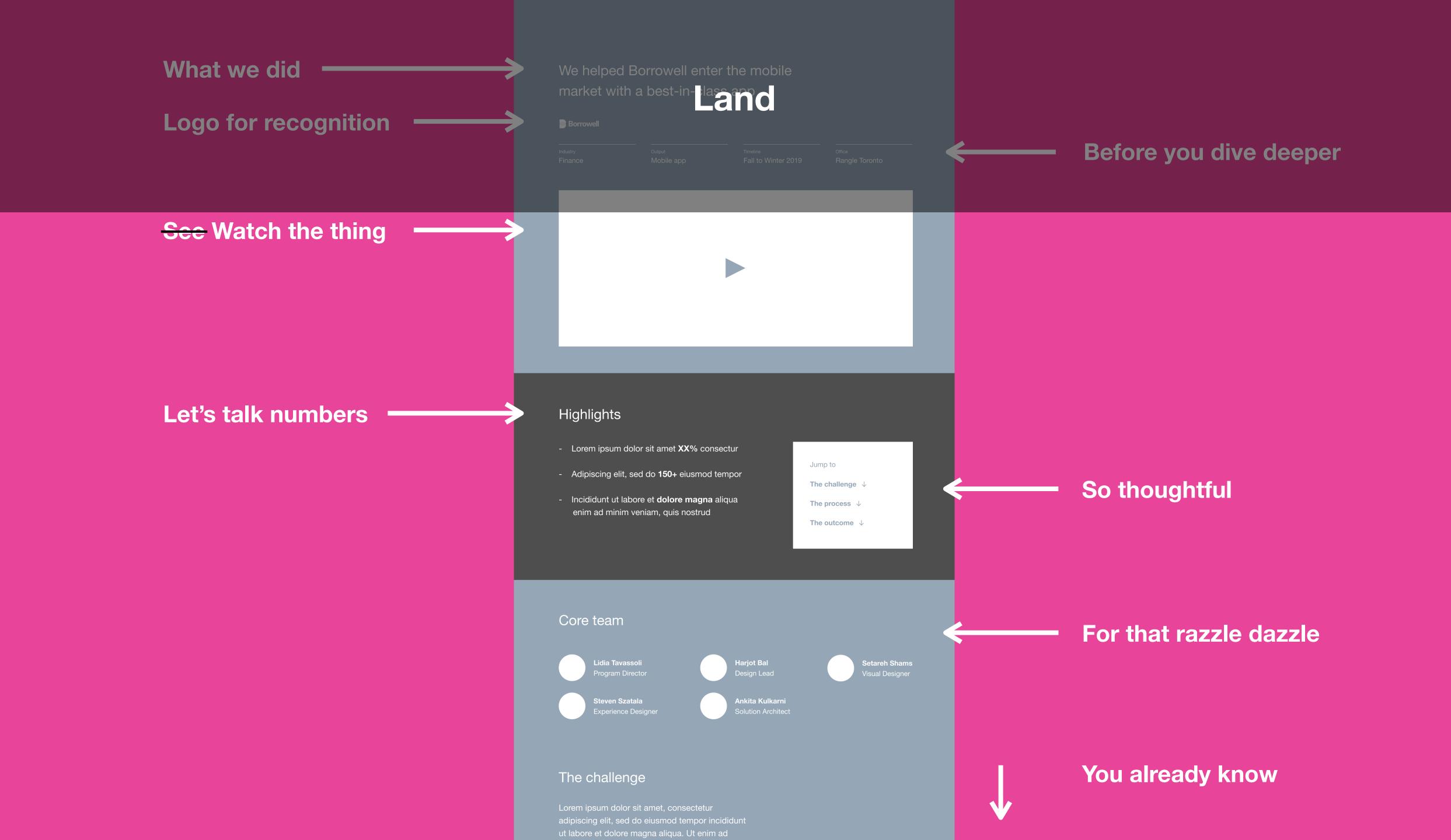


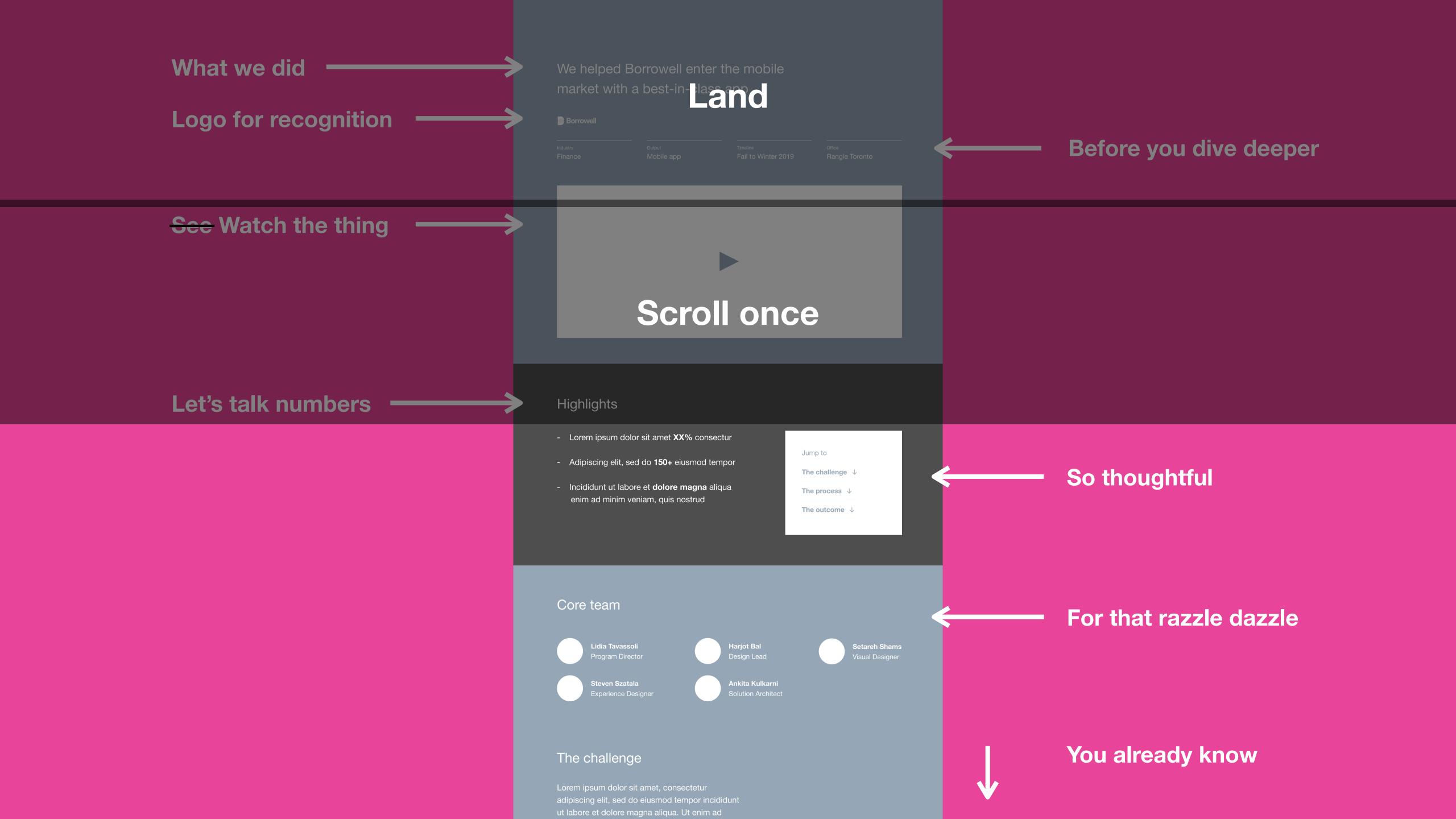
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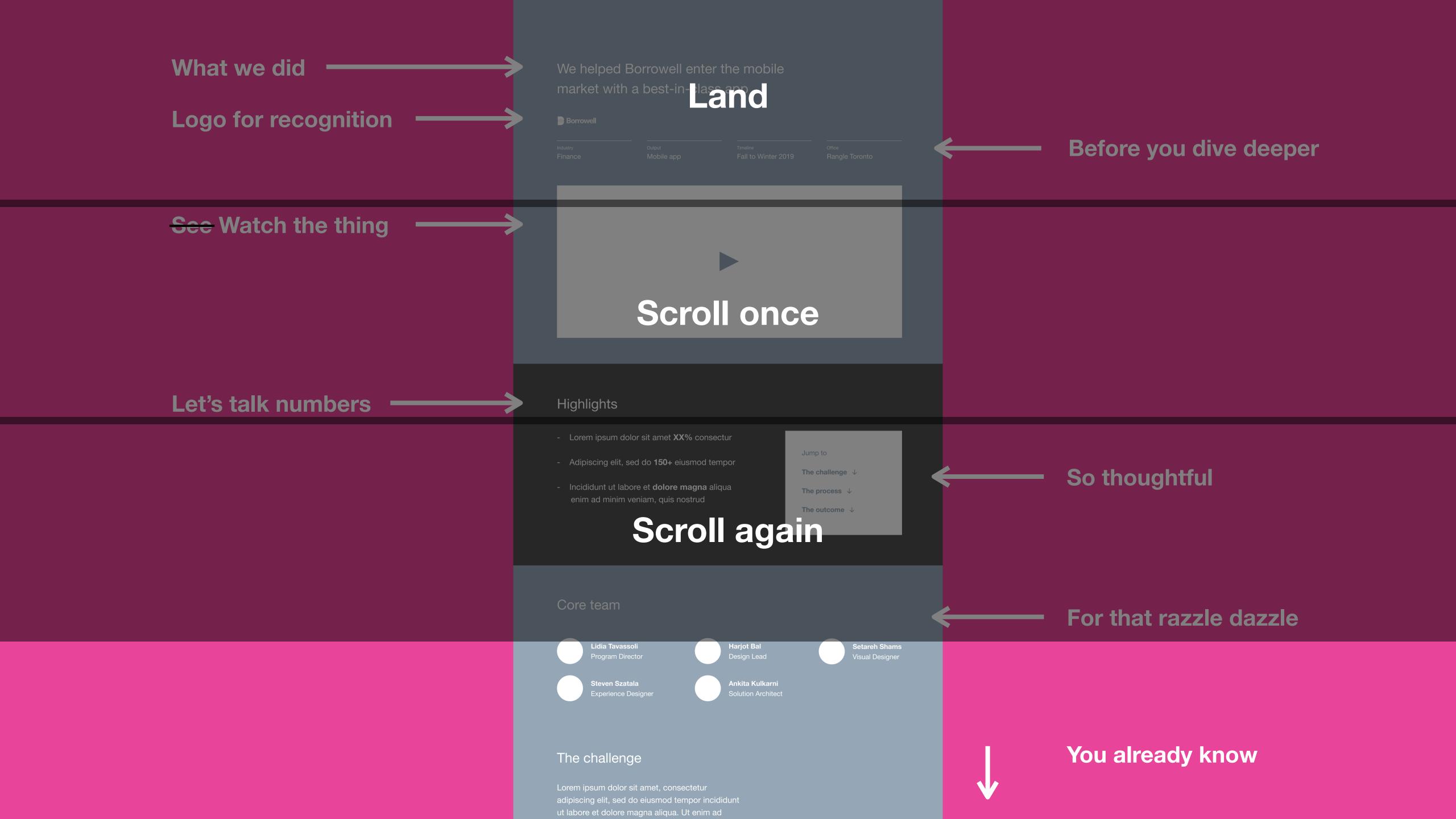


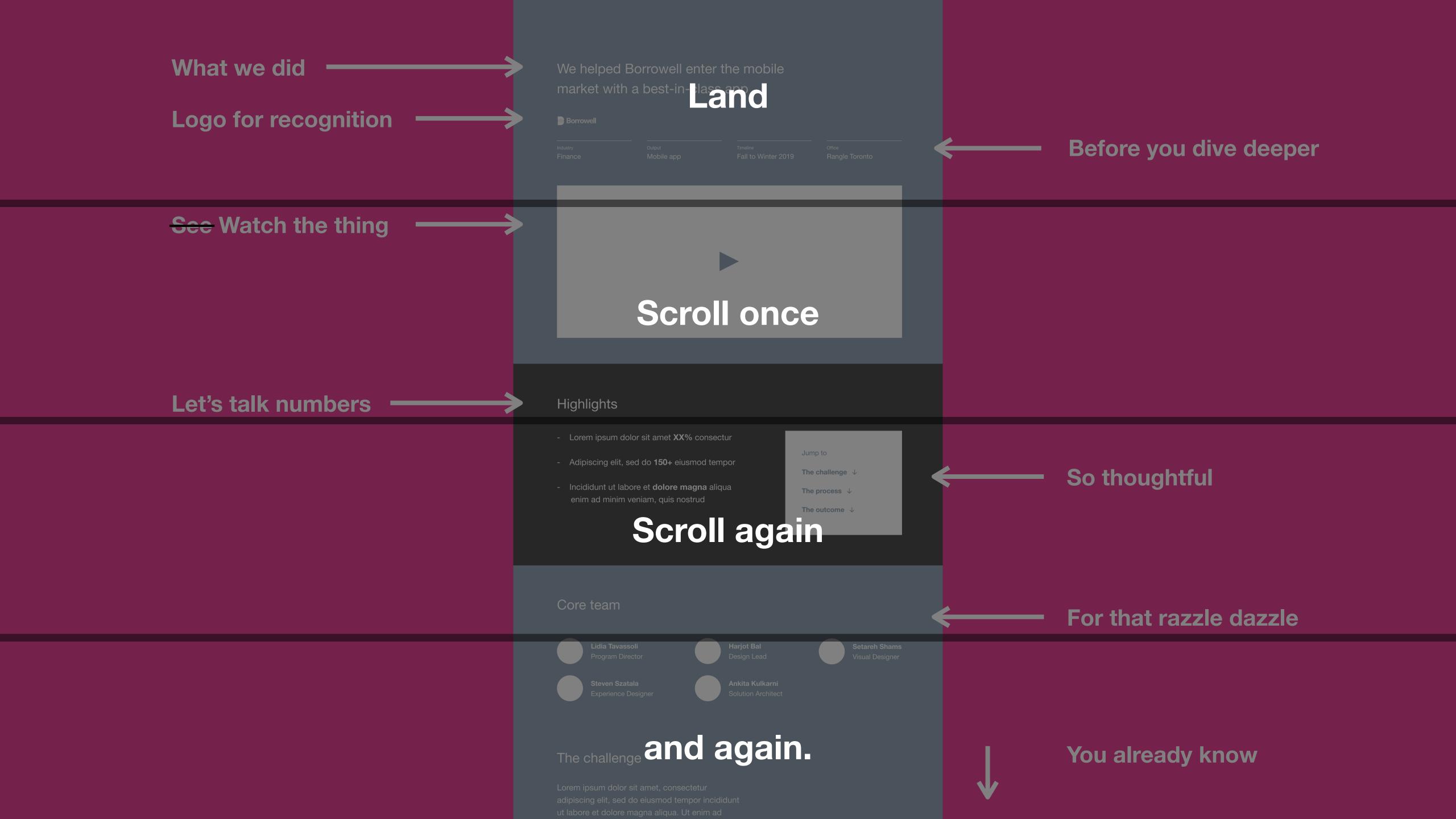








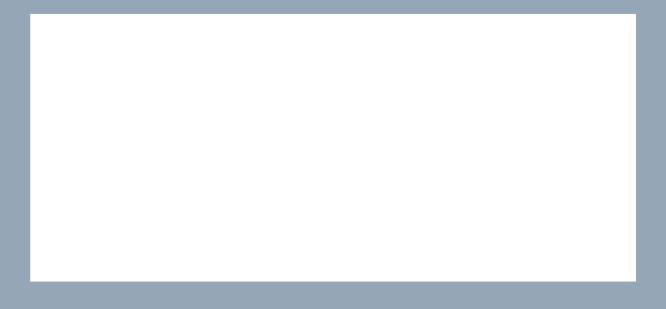






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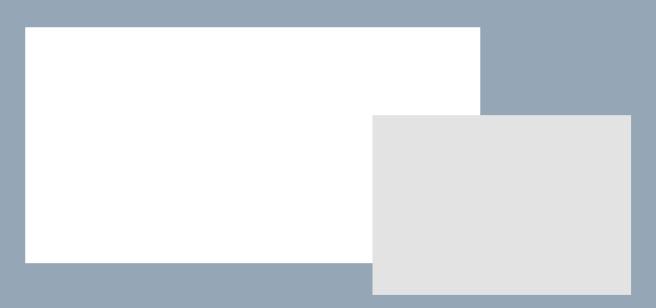


Mobile app for Finance

Borrowell

#### What problem were we trying to solve?

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### We helped Borrowell enter the mobile market with a best-in-class app



#### Highlights

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Jump to

The challenge ↓

The process ↓

The outcome  $\downarrow$ 

#### Core team



idia Tavassoli rogram Director



Harjot Bal
Design Lead



Setareh Shams
Visual Designer

#### Soluti

#### The challenge

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#### **Borrowell • Mobile app • Finance**

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Borrowel

#### trying to solve?

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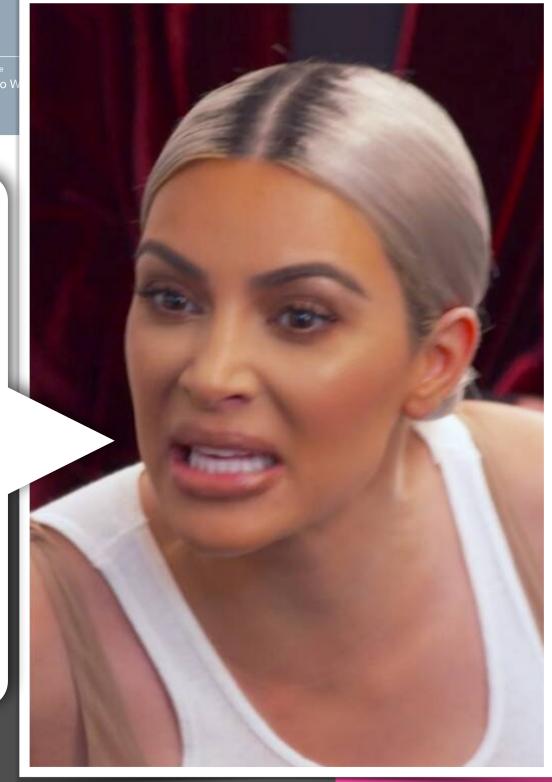
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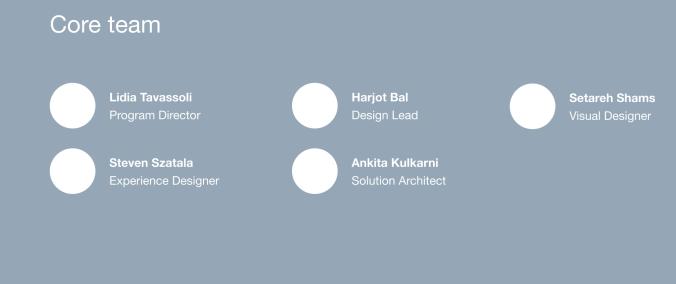
We helped Borrowell enter the mobile market with a best-in-class app

Borrowell

Industry
Output
Finance
Mobile app
Fall to W

Maybe if you had a f\*\*\*ing business that you were passionate about you would know what it takes to run a f\*\*\*ing business but you DON'T!

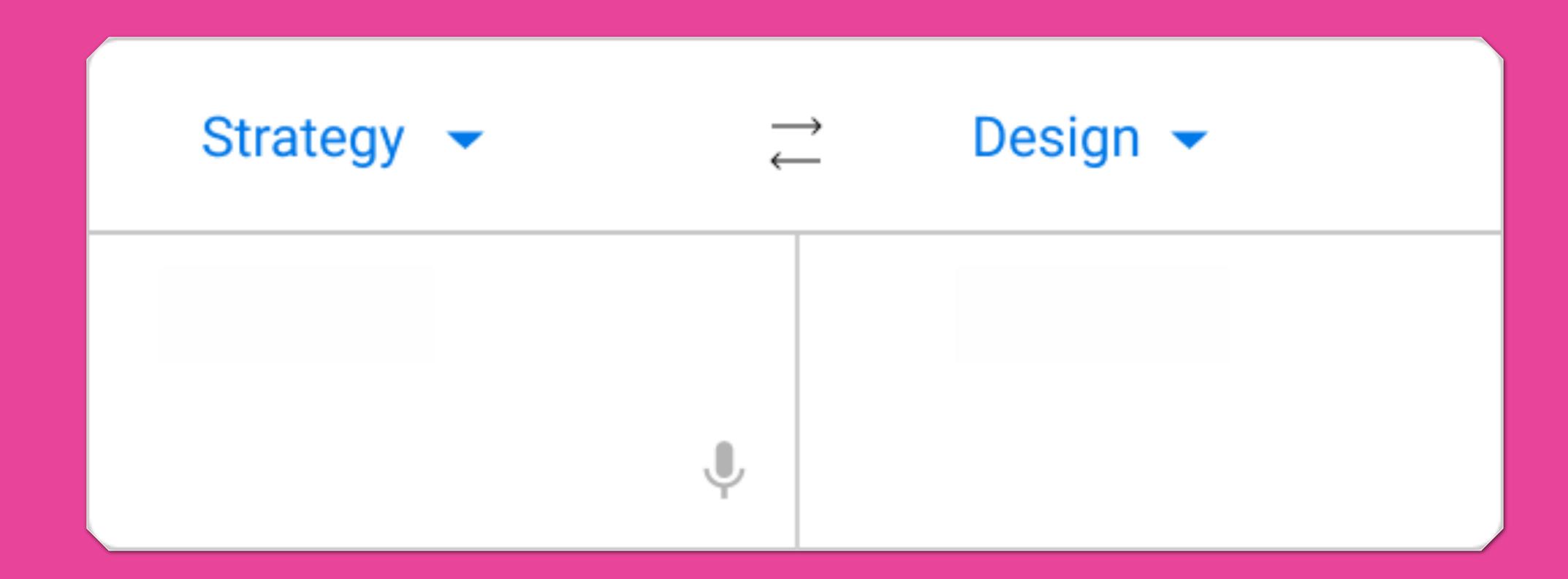




#### The challenge

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Design -

Users landing on a case study grow frustrated in trying to figure out if the content is relevant for them to consume. Dense information doesn't allow users to quickly scan priority details.



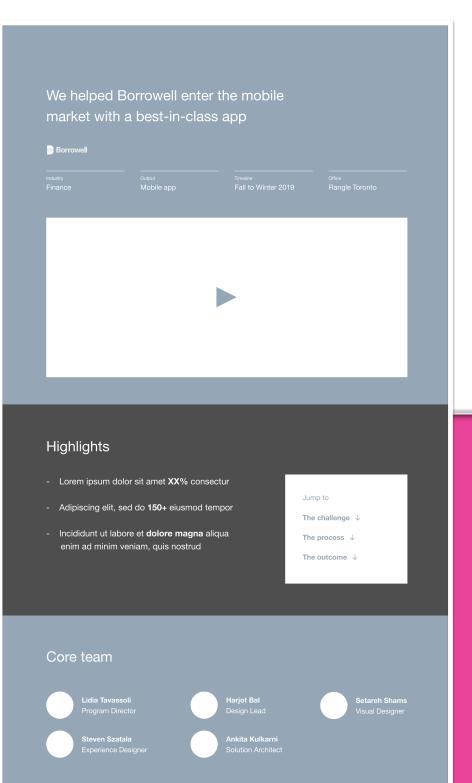
## Strategy



## Design -

Users landing on a case study grow frustrated in trying to figure out if the content is relevant for them to consume. Dense information doesn't allow users to quickly scan priority details.





# OK. Next.

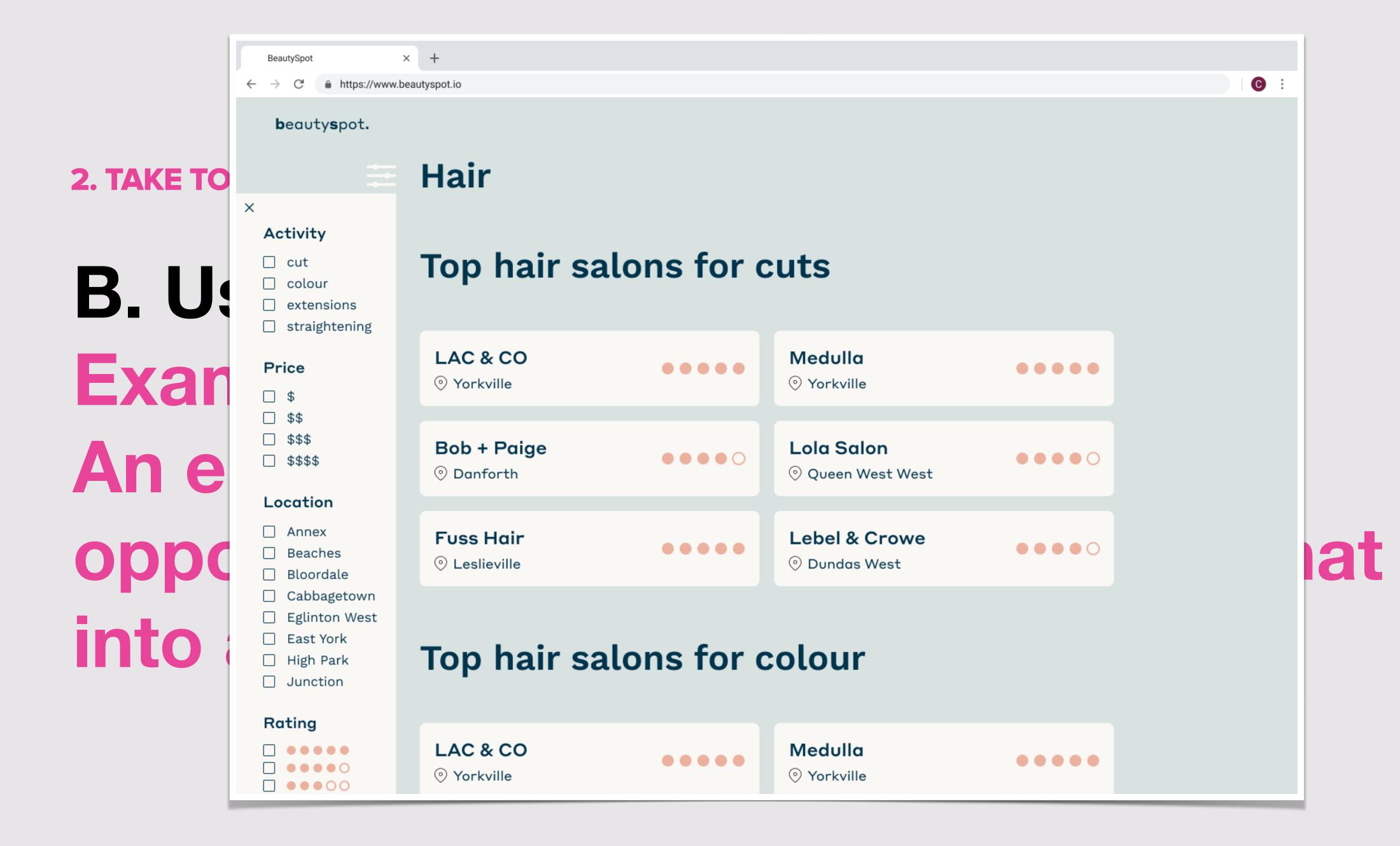
## B. Use the use case

# B. Use the use case Example:

## B. Use the use case

# Example:

An entrepreneur recognizes an opportunity to turn a Slack group chat into a business.



# B. Use the use case Insight:

B. Use the use case Insight:
People prefer *real* recommendations from people like themselves.

# B. Use the use case Insight:

People prefer *real* recommendations from people like themselves. "Hey ladies, anyone know where I can get quick a blow out over lunch?"

# B. Use the use case The first draft...



### Connecting you with your ideal beauty experience.

Quick access to local services for your hair, skin, nails. Our list of spots is curated by people like you.

Browse spots

#### How it works.

#### Need a spot?



Need to find a nail place near your new office or the best spot in town to cut curly hair?

#### Find your spot.



Access reviews from real people giving honest opinions on beauty spots across the GTA.

#### **Newest spots.**



Parlour

O Yorkville



Hairz

O Liberty Village



Lac & Co

Yorkville



Parlour

O Queen West

beautyspot.

nails

browse spots

#### A bit cookie cutter, no?

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skin

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Parlour

o Yorkville



Hairz

O Liberty Village



Lac & Co

O Yorkville

Parlour

O Queen West

## Relying on users to scan, read, and engage.



# B. Use the use case Hmm...

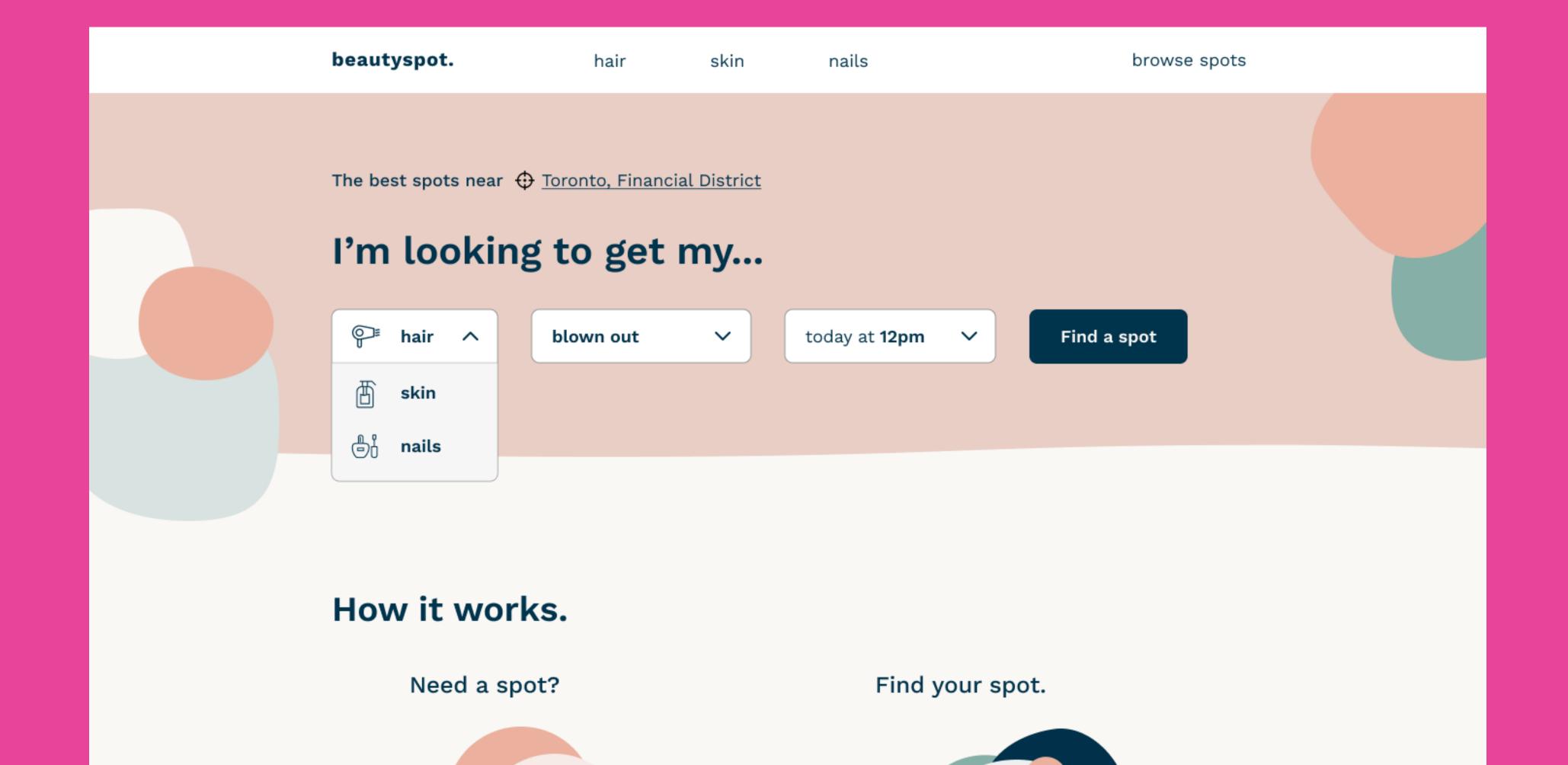
B. Use the use case
Hmm...
Remember the group chat?

B. Use the use case
Hmm...
Remember the group chat?
Draw the analogy.



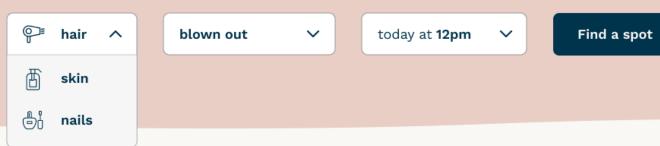
"Hey ladies, anyone know where I can get quick a blow out over lunch?"

# "Hey ladies, anyone know where I can get quick a blow out over lunch?"





#### I'm looking to get my...



#### How it works.

Need a spot?



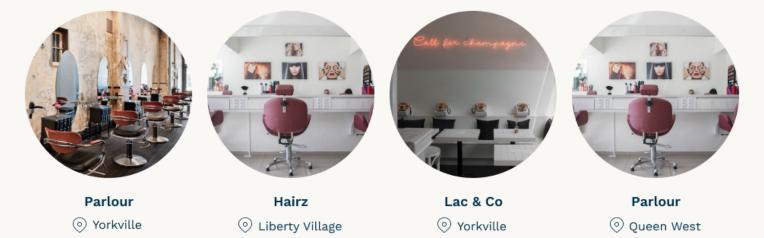
Need to find a nail place near your new office or the best spot in town to cut curly hair?

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Access reviews from real people giving honest opinions on beauty spots across the GTA.

#### Newest spots.



beautyspot. browse spots nails

#### Connecting you with your ideal beauty experience.

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**Browse spots** 

#### How it works.

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#### **Newest spots.**



Yorkville



O Liberty Village



Yorkville



O Queen West

beautyspot.

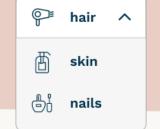
blown out

nails

browse spots

The best spots near 💠 Toronto, Financial District

#### I'm looking to get my...



today at 12pm

Find a spot

#### How it works.

#### Need a spot?



Need to find a nail place near your new office or the best spot in town to cut curly hair?

#### Find your spot.



Access reviews from real people giving honest opinions on beauty spots across the GTA.

#### **Newest spots.**



Yorkville



O Liberty Village



Yorkville



O Queen West

beautyspot. nails browse spots

#### Connecting you with your ideal beauty experience.

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**Browse spots** 

#### How it works.

Need a spot?



Find your spot.



Need to a nail place near people your new to be a specific to the specific to

#### **Newest spots.**





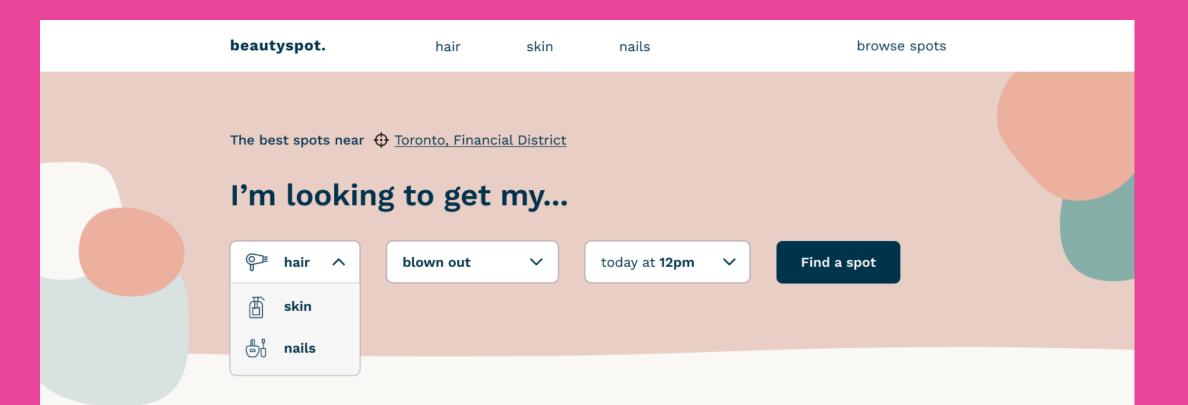
⊙ Yorkville ⊙ Liberty Village



Yorkville



Queen West



#### How it works.

Need a spot?



#### Find your spot.



Need to find a nail place negretary our new office or the best 155 leaving honest opinions on beauty in town to cut curly hair?

#### **Newest spots.**







Liberty Village





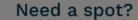
beautyspot. nails browse spots

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**Browse spots** 

#### How it works.





Find your spot.



Need to a nail place near place n

### New Dön't romance me...



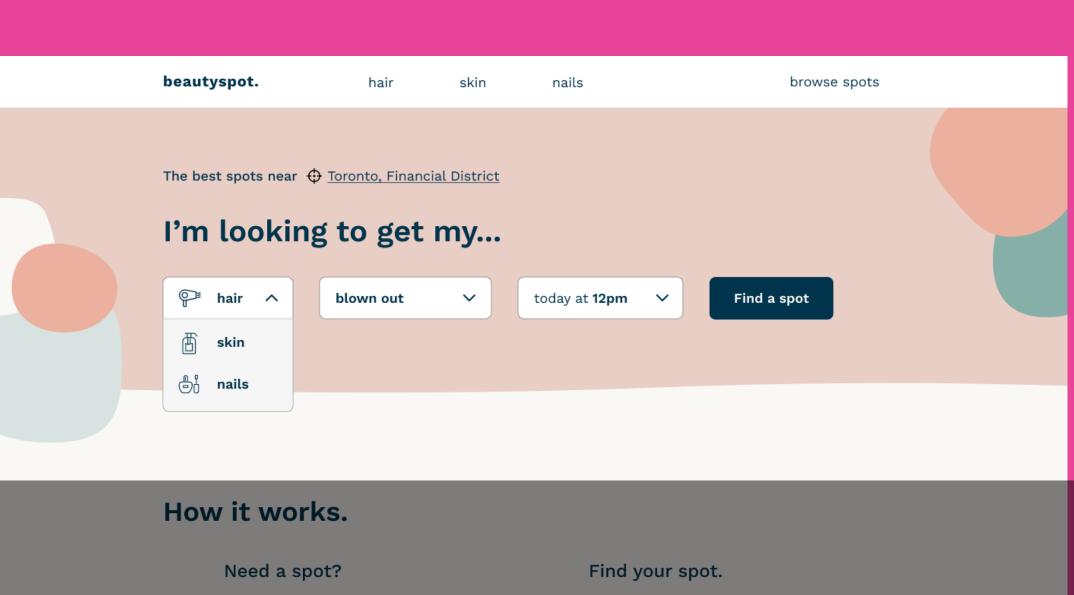




Yorkville



Queen West



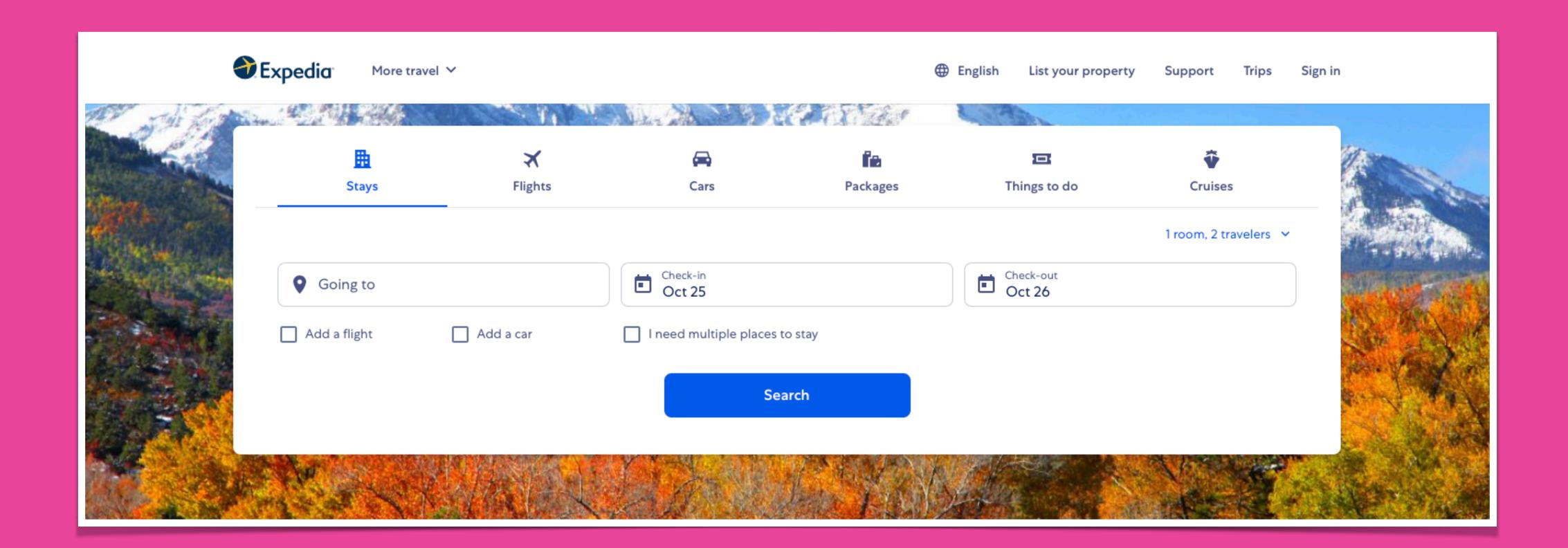


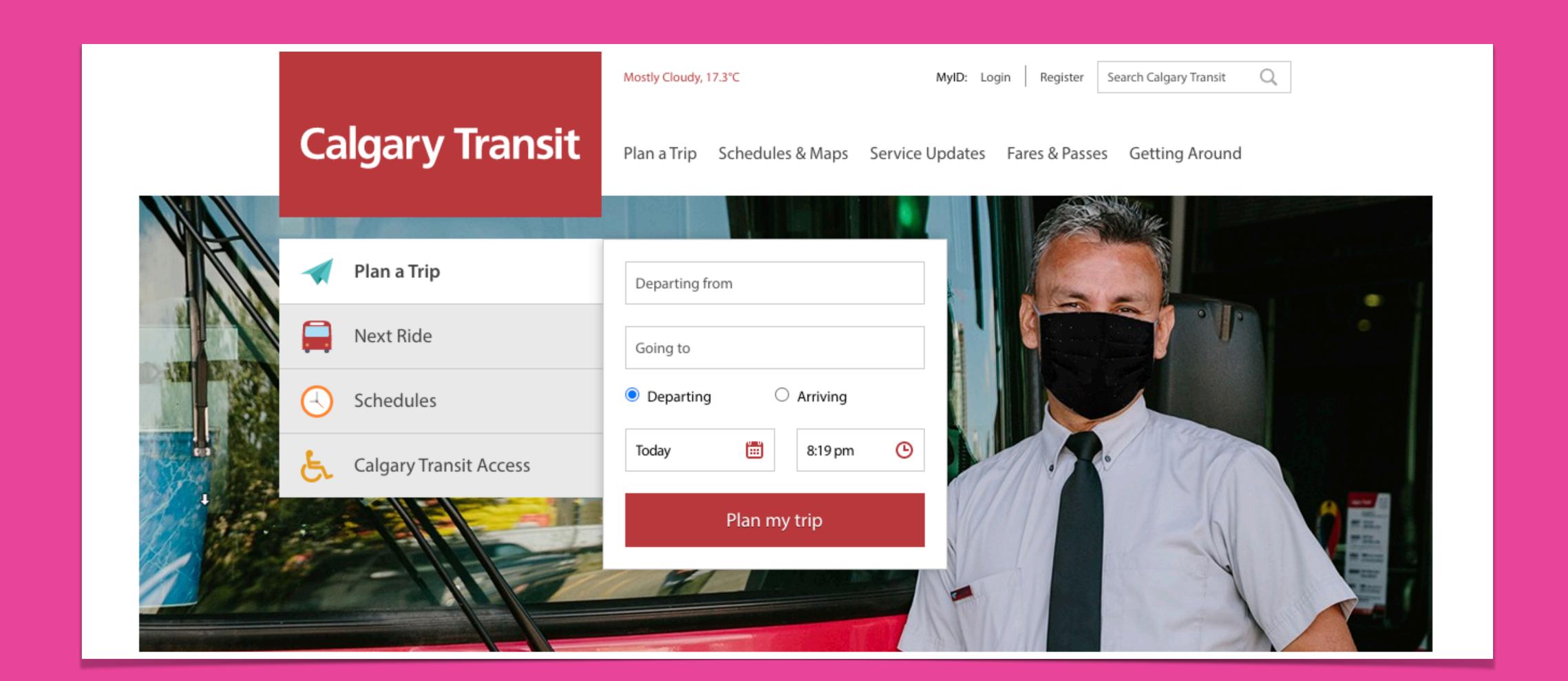


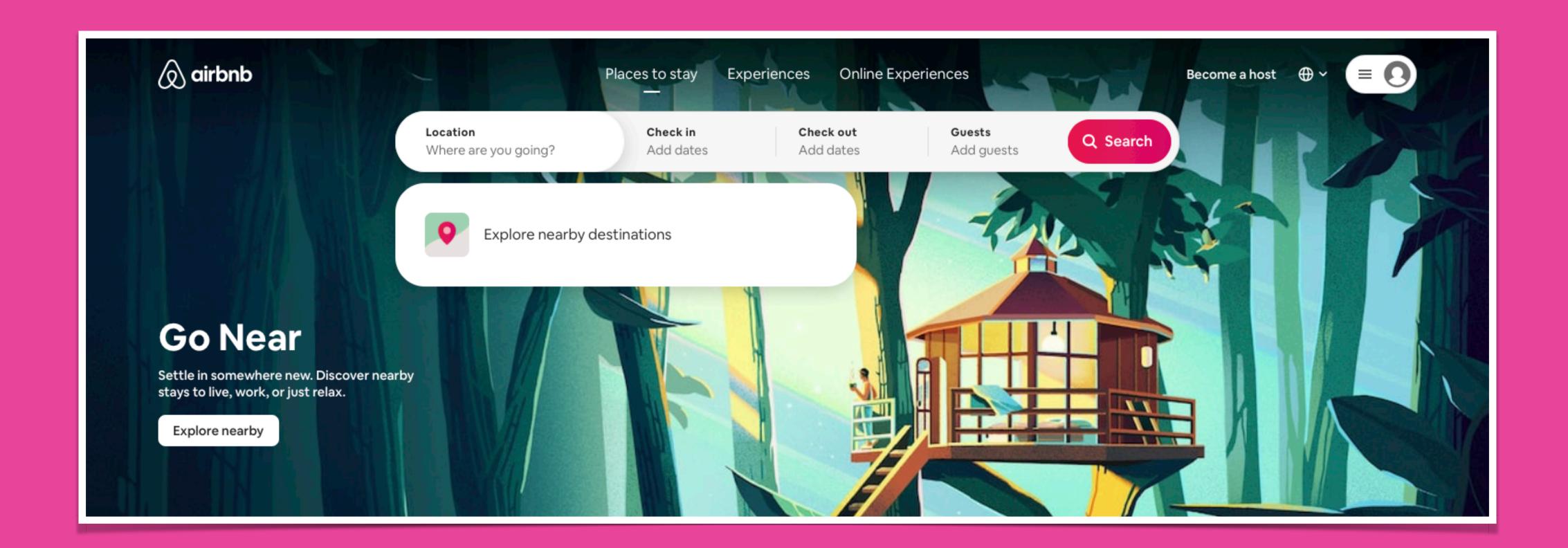
### Newest spots. just show me!



## Where have I seen this before?







# Beauty

Beauty

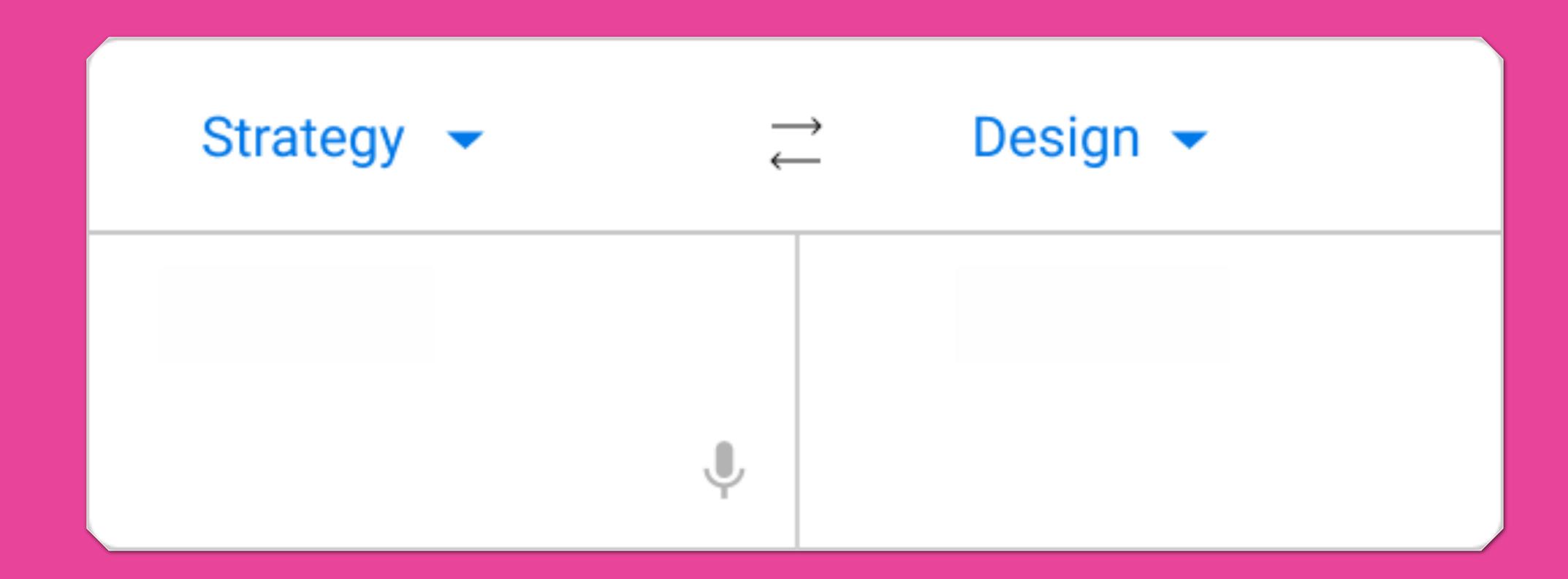
Travel,
tourism,
and hospitality

Beauty

~~

Travel,
tourism,
and hospitality

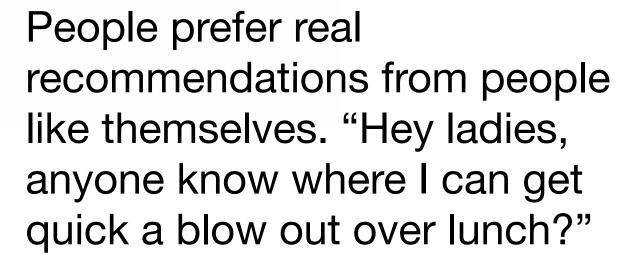








Design -





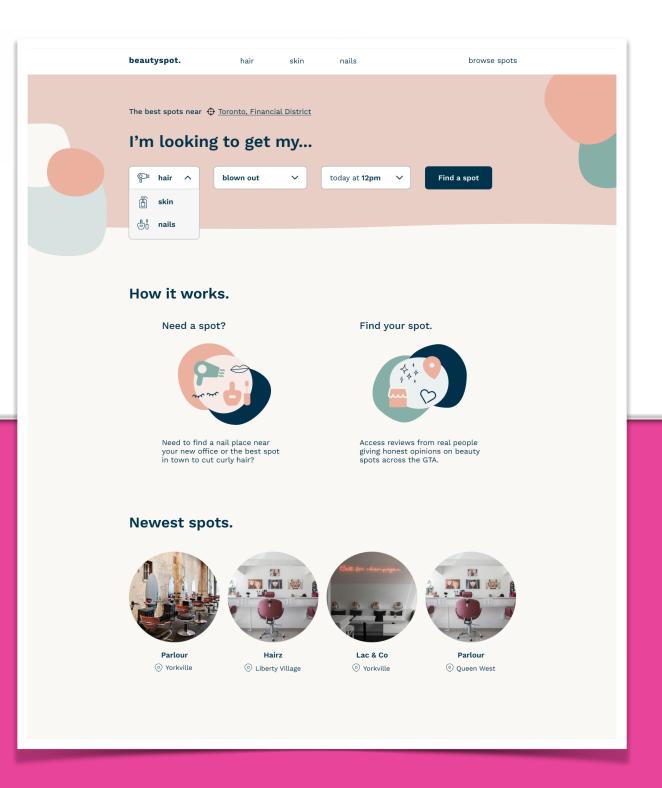
### Strategy -



### Design -

People prefer real recommendations from people like themselves. "Hey ladies, anyone know where I can get quick a blow out over lunch?"





## Aaand, last one.

## C. Get wild

## C. Get wild Example:

### C. Get wild

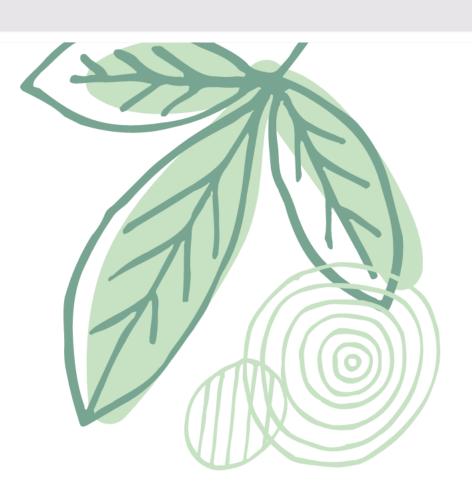
## Example:

A frozen food retailer tries to educate its customers on the nutritional value of its products.

2. TAKE T

C. GEXAINATION







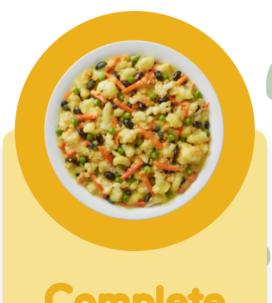
Veggiefull Patties



Pizzas & Crusts



Snacks & Appetizers



Complete Meals

e its
fits

## C. Get wild Insight:

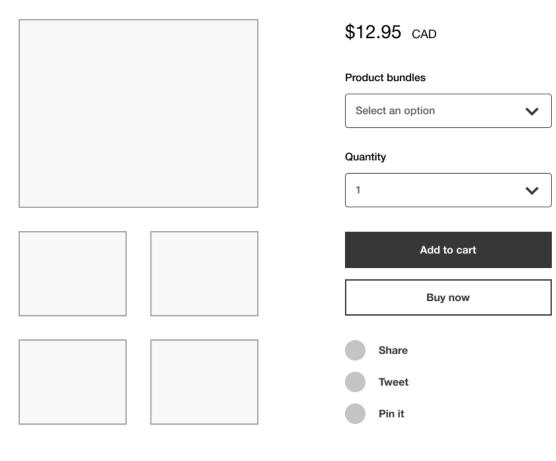
## C. Get wild Insight:

The retailer's quirky brand personality performs well with its target audience because it's fun and not intimidating.

# C. Get wild The first draft... (you know where this is going)



#### Sweet Curry Carrot



#### What's to love

A harvest inspired blend of Non GMO corn, heirloom carrots, and yellow lentils with a hint of curry!

The Sweet Curry Carrot is slightly on the sweeter side, with the flavor of curry balanced out with a dash of honey. Softer in texture, this patty is perfect for those looking to add more protein to wraps, or even have as a breakfast item.



#### The star ingredient(s)



Carrots are excellent for gut health because they include plenty of fiber and as most people know fantastic for eyesight.

Non-GMO: Corn, carrot, lentils, cage free egg white powder, non-modified rice starch, non-modified potato starch, non-modified corn starch, sunflower oil, spices, vinegar solids, pea protein, honey, salt, garlic powder.







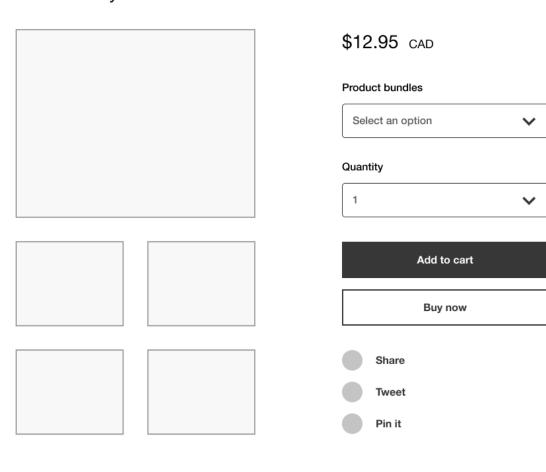


#### Nutrition Facts Valeur nutritive

Per 1 patty (75 g) / pour 1 galette (75 g) % Daily Value % valeur quotidienne Calories / Calories 110 Fat / Lipides 3.5 g Saturated / saturés 0.3 g + Trans / trans 0 g Cholesterol / Cholestérol 0 mg 0 % Sodium / Sodium 170 mg Potassium / Potassium 260 mg 7 % Carbohydrate / Glucides 14 g 5 % Fibre / Fibres 3 g 12 % Sugars / Sucres 3 g Protein / Protéines 7 g Vitamin A / Vitamine A 4 % Vitamin C / Vitamine C 0 % Calcium / Calcium 2 % Iron / Fer 10 %

#### Pretty basic.

#### Sweet Curry Carrot



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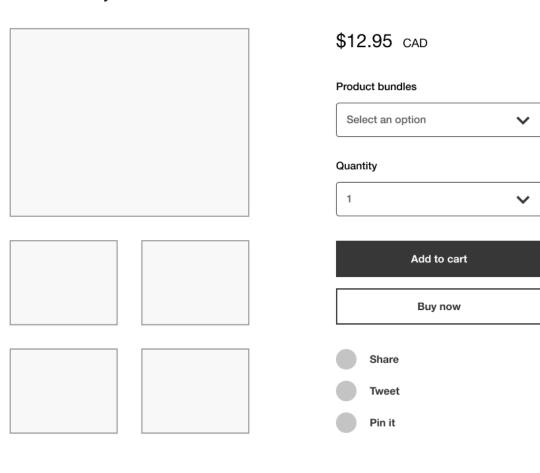
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#### Pretty basic.

Oooh a carrot...

#### Sweet Curry Carrot



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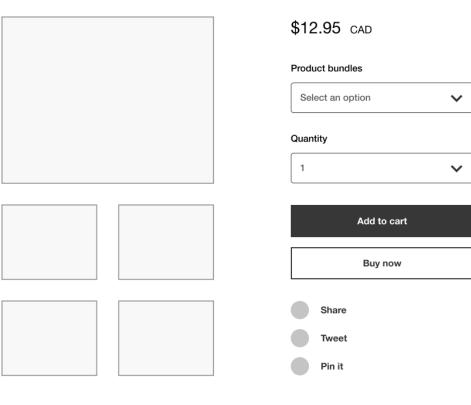
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## C. Get wild C'mon...



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#### The star ingredient(s)

#### The crafty Carrot

Carrots are excellent for gut health because they include plenty of fiber and as most people know fantastic for eyesight.

#### Strengths

- + Boosts metabolism and fat-burning
- + Retains powers of nutrition when grilled

#### + Unstoppable when steamed

Fibre Protein



Non-GMO: Corn, carrot, lentils, cage free egg white powder, non-modified rice starch, non-modified potato starch, non-modified corn starch, sunflower oil, spices, vinegar solids, pea protein, honey, salt, garlic powder.



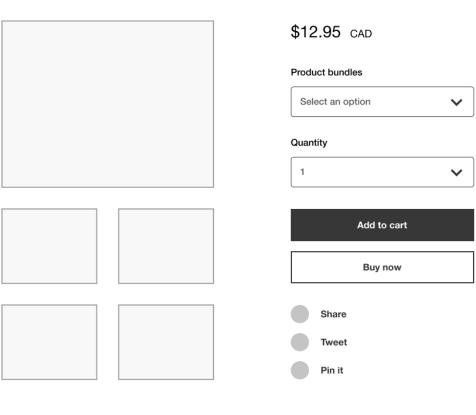






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## The start of a series...

#### The crafty Carrot

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#### Strengths

- + Boosts metabolism and fat-burning
- + Retains powers of nutrition when grilled
- + Unstoppable when steamed

#### Stats

Protein Iron





#### The almighty Broccoli

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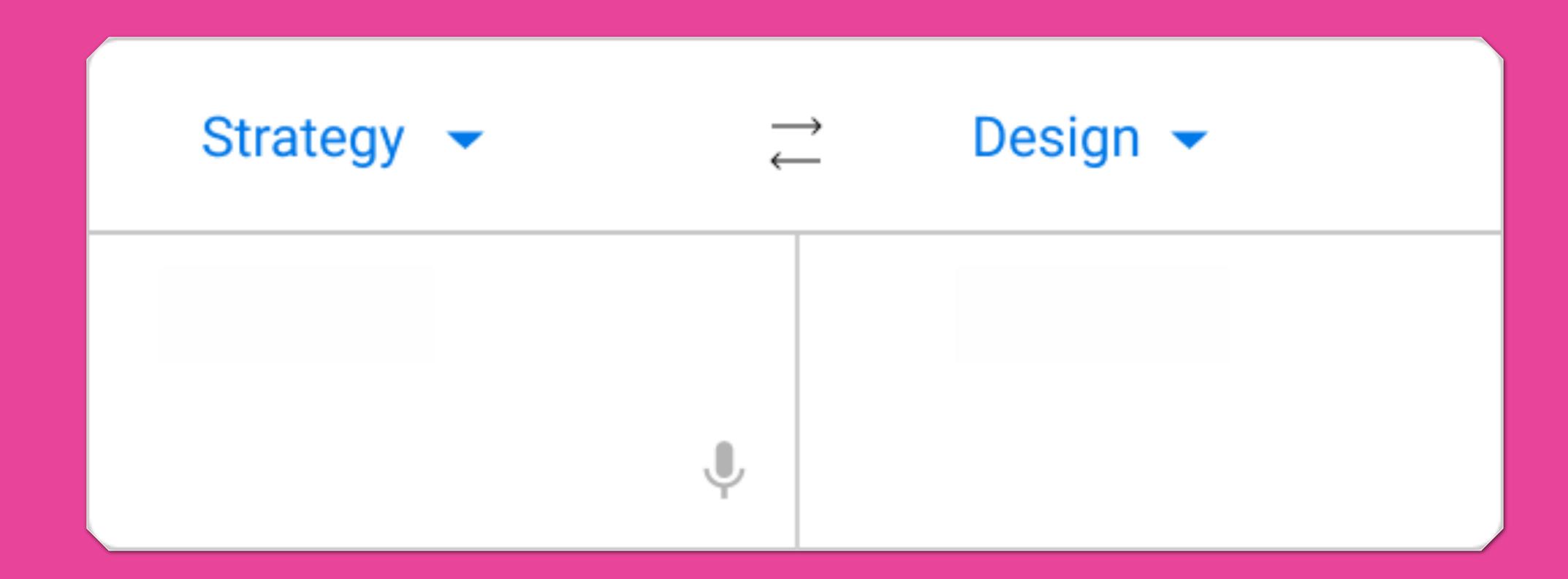
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#### Stats

Fibre	
Protein	
Iron	

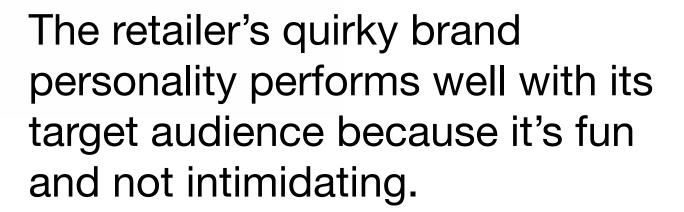








Design -





### Strategy



Design -



The retailer's quirky brand personality performs well with its target audience because it's fun and not intimidating.







## OK. That's enough.

## Breaky time A 5 minute stretch will do you good.

## 3. Take it away

## How can we take this to our practice?

## How can we take this to our practice? It's not always clear.

How can we take this to our practice? It's not always clear. It takes practice.

How can we take this to our practice?
It's not always clear.
It takes practice.
Designer's intuition.

How can we take this to our practice?
It's not always clear.
It takes practice.
Designer's intuition.

BUUUT...

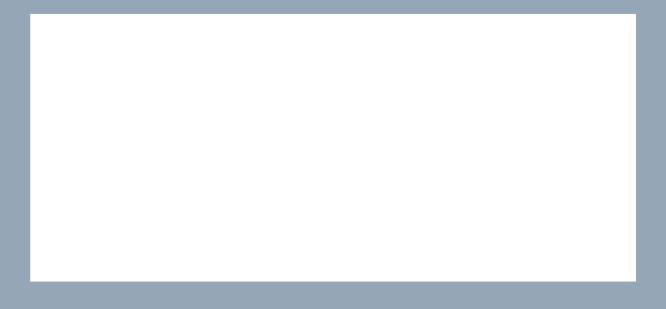
## There are a few things to consider:

# There are a few things to consider: Try new patterns.

## Try new patterns.

#### Borrowell • Mobile app • Finance

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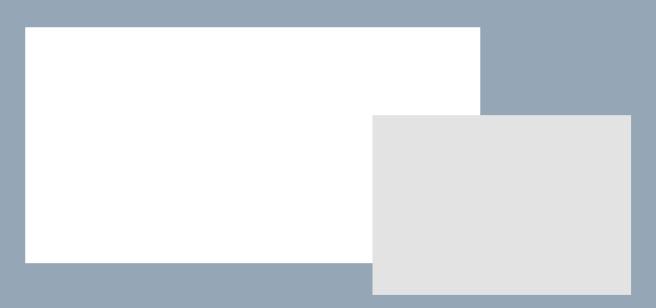


Mobile app for Finance

Borrowell

#### What problem were we trying to solve?

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#### Subheading

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- Sed do eiusmod tempor
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#### We helped Borrowell enter the mobile market with a best-in-class app



#### Highlights

- Lorem ipsum dolor sit amet XX% consectur
- Adipiscing elit, sed do **150+** eiusmod tempor
- Incididunt ut labore et dolore magna aliqua enim ad minim veniam, quis nostrud

Jump to

The challenge ↓

The process ↓

The outcome  $\downarrow$ 

#### Core team



idia Tavassoli rogram Director



Harjot Bal
Design Lead



Setareh Shams
Visual Designer

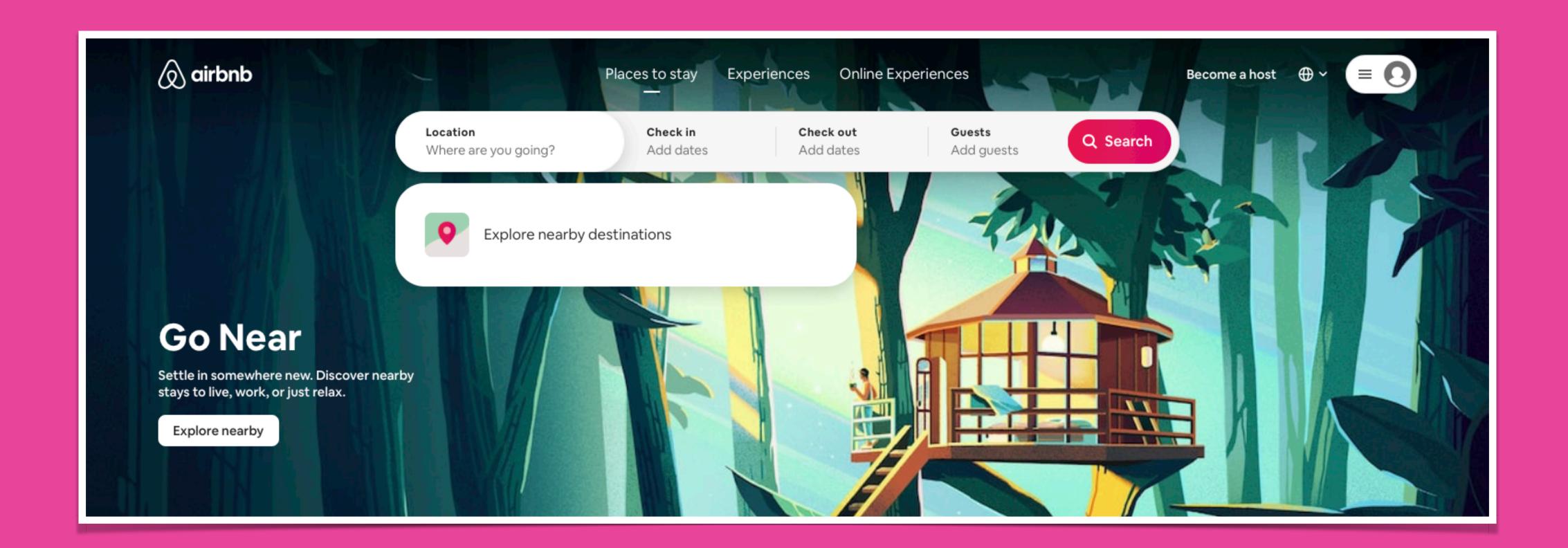
#### Soluti

#### The challenge

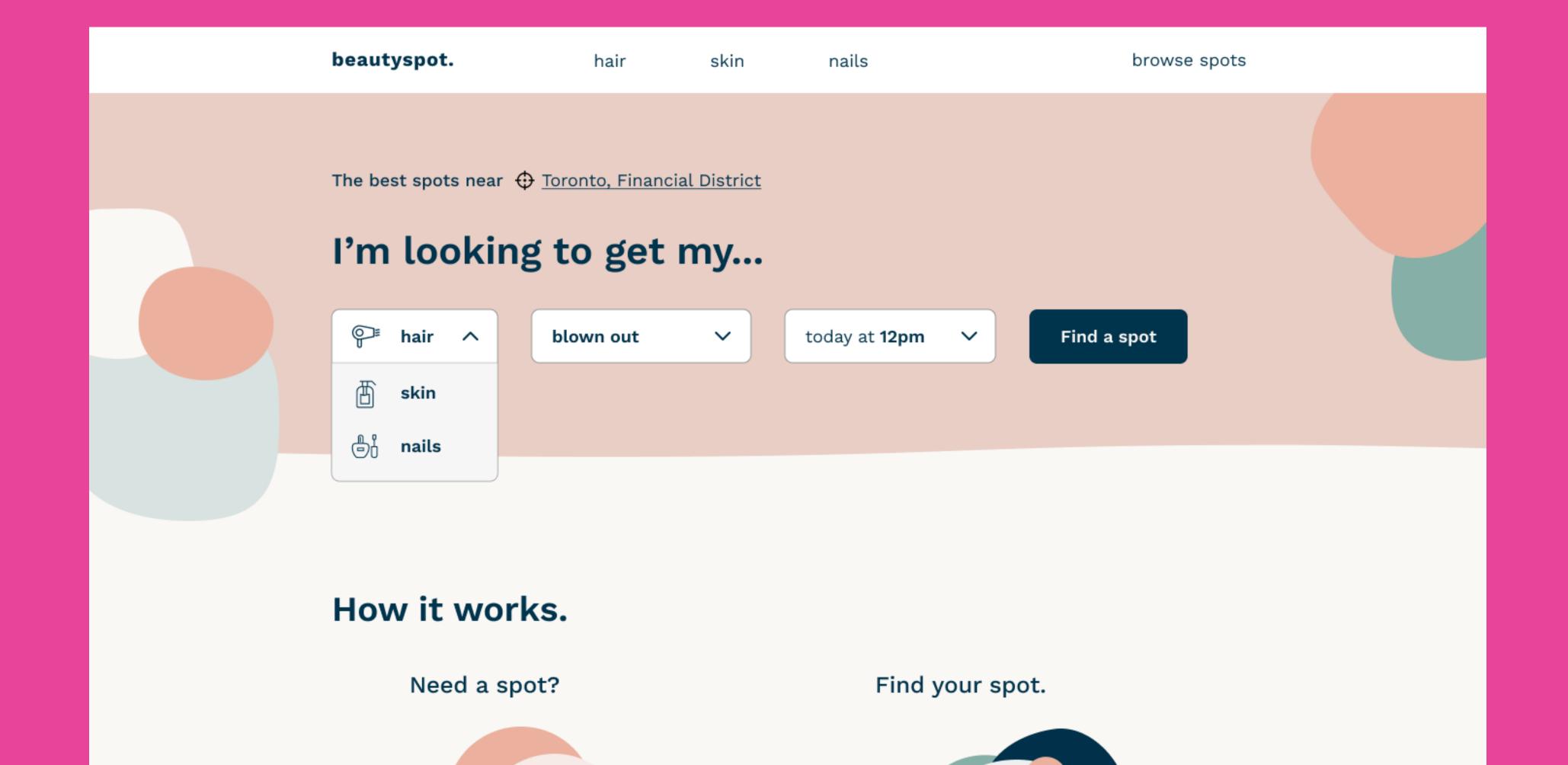
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# There are a few things to consider: Try new patterns. Analogize outside of your competition.

## Analogize outside of your competition.



# "Hey ladies, anyone know where I can get quick a blow out over lunch?"



There are a few things to consider:

Try new patterns.

Analogize outside of your competition.

"Have fun with it." — Kawhi Leonard

There are a few thing
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#### Strengths

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- + Retains powers of nutrition when grilled
- + Unstoppable when steamed

#### Stats

Fibre	
Protein	
Iron	

## There you have it...

# Resources — > For your tool belt.

# Article What customer-centric design really means

medium.com/@harjot.bal/whatcustomer-centric-design-really-meanse82efd266422

# Article Why your project needs a strategic brief blog.mindgrub.com/why-your-projectneeds-a-strategic-brief

# Article The insight: the most important part of the brief medium.com/what-do-you-want-to-know/the-insight-the-most-important-

part-of-the-brief-6fb97f6d60d5

**OKAY, NOW I'M SUUUPER TIRED** 

## This is pretty much the end.





Design -

Questions?

Comments?

Feedback?

I'm ready to leave...
unless you have
something to share.



# Goodbye.