



STEVE SUTANTO

# Crafting Experiences: Select UX Stories

Product Design & Strategy • Design Leadership • [stevesutanto.co](http://stevesutanto.co)

# Agenda

## About me

A quick overview of design milestones, guiding principles, and my approach.

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## The work

Work snapshots in Financial Services, Life Sciences, and Business Development.

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## Closing

Key highlights of my fit for the role applied and few shout outs from peers and leaders.

# About me

A brief overview of key design milestones, guiding principles, and my approach to work.



## Steve Sutanto

Product Design & Strategy

Over **12 years** of experience in user-centered product design and strategy, turning ambiguity into action. Comfortable in agile environments, cross-functional collaboration, and solving complex challenges in regulated industries like **life sciences, healthcare, and finance**.

### DESIGN MILESTONES

#### 2012

Started UX/UI journey at tech startups to medium sized companies including **eharmony**

*Los Angeles, CA*

#### 2020

Hired during the pandemic to lead design projects for healthcare and online retail clients at a global digital ad agency, including **Pfizer** and **United Rentals**.

*Kansas City, MO*

#### 2011

Different era: Freelance web designer, flash designer and UI/ Production Artist intern at **Warner Brothers**.

*Los Angeles, CA*

#### 2015

Led design teams and relocated to Jakarta, Indonesia to work for a **top 3 regional eCommerce** and a **top 5 tech-enabled delivery logistics** company in Southeast Asia.

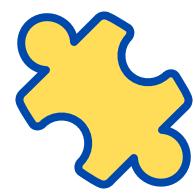
*Jakarta, Indonesia & Singapore*

#### Now

Joined a tech consultancy, expanding client work in **financial services, healthcare, and online retail**, while contributing to the firm's growth.

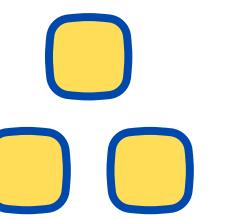
*Remote, U.S*

# Guiding Principles



## It's progress not perfection!

When tackling complex projects, I embrace the uncertainty, rigorously navigating the discovery process to ensure progress while solving challenges.



## Teamwork makes the dream work

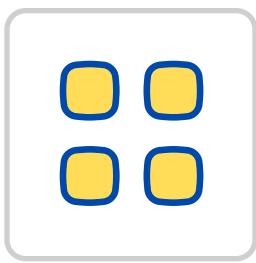
I love the quote, "If you want to go fast, go alone. If you want to go far, go together." Designing a product is a team effort. Collaborating early and often brings clarity and alignment to design challenges.



## Pivot!

I work closely with my team to develop a process that suits everyone. Flexibility and adaptability are crucial; changes in priority, scope, or other business decisions. Embracing flexibility is essential.

# Leadership Influence (High-Level)



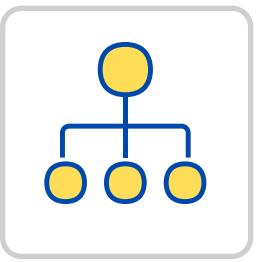
## Project Lead

Led a variety of projects, from portfolio-level initiatives to workstreams, supporting product development, business development, or design operations.



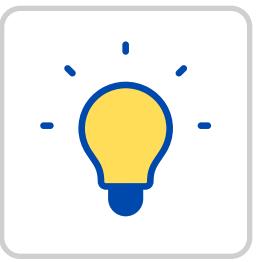
## Mentorship

Provides guidance to Designers in diverse setting, whether via structured programs like internships or bootcamps, or by offering project oversight at both individual and team levels.



## Team Management

Led a team of product designers and product managers to support strategic initiatives for tech startups, enhancing design operations and fostering career development



## Thought Leadership

Delivered UX-related trainings, workshops and sharing sessions with relevant communities of practices, events and speaking engagements.

## Product Thinking

Centers on the understanding of the customer needs, aligning with business goal and iterating based on feedback and collaborating across teams to delivery continuous Value

## How I work

Over the years, I've recognized the significance of aligning my design process with the Product-Thinking mindset to create holistic solutions that consider both the business (or team) goals and user needs.

### Design the right thing

- Principles mindset
- Primary / Secondary Research
- Stakeholder interview
- Persona
- Customer journey

### Design the thing right

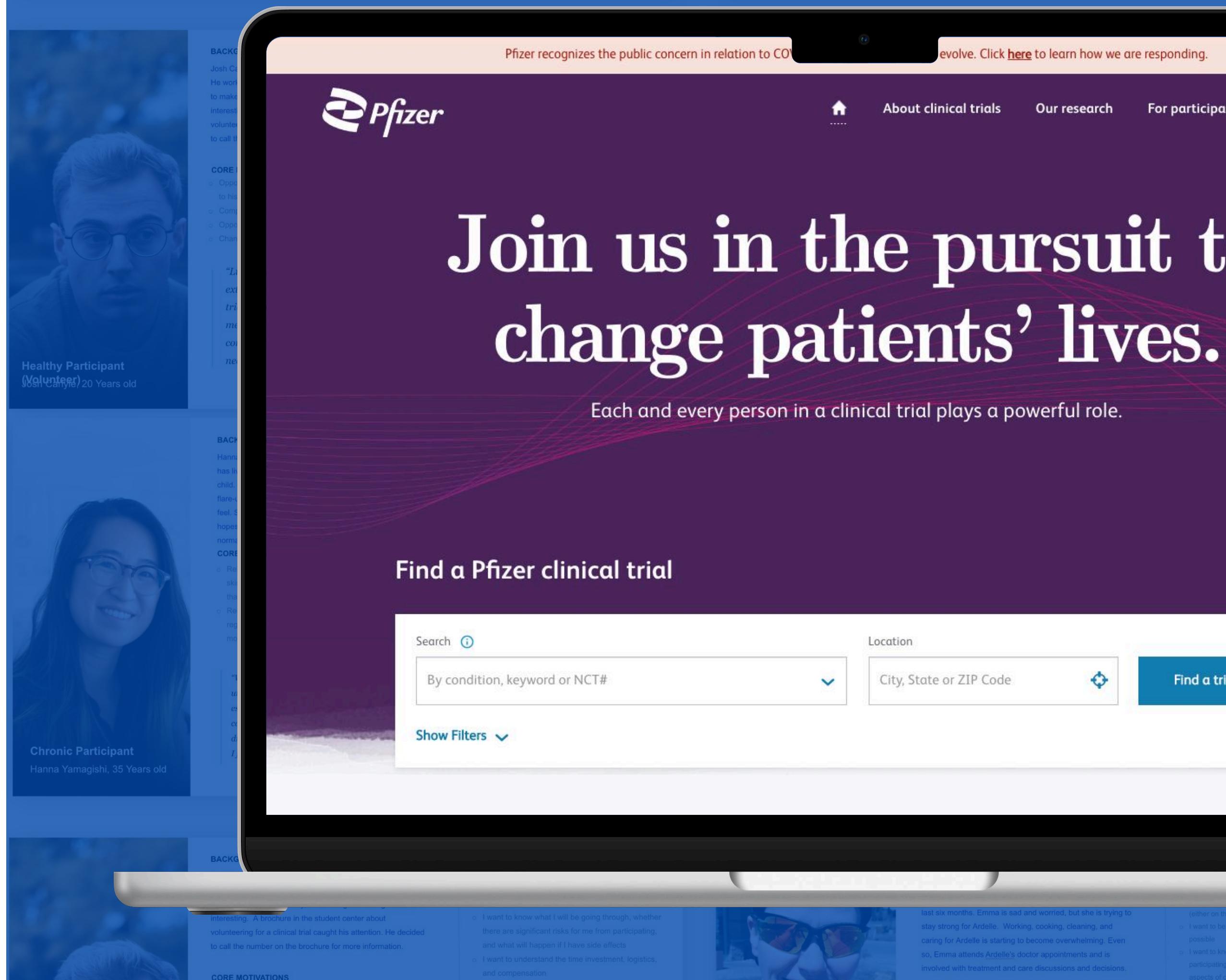
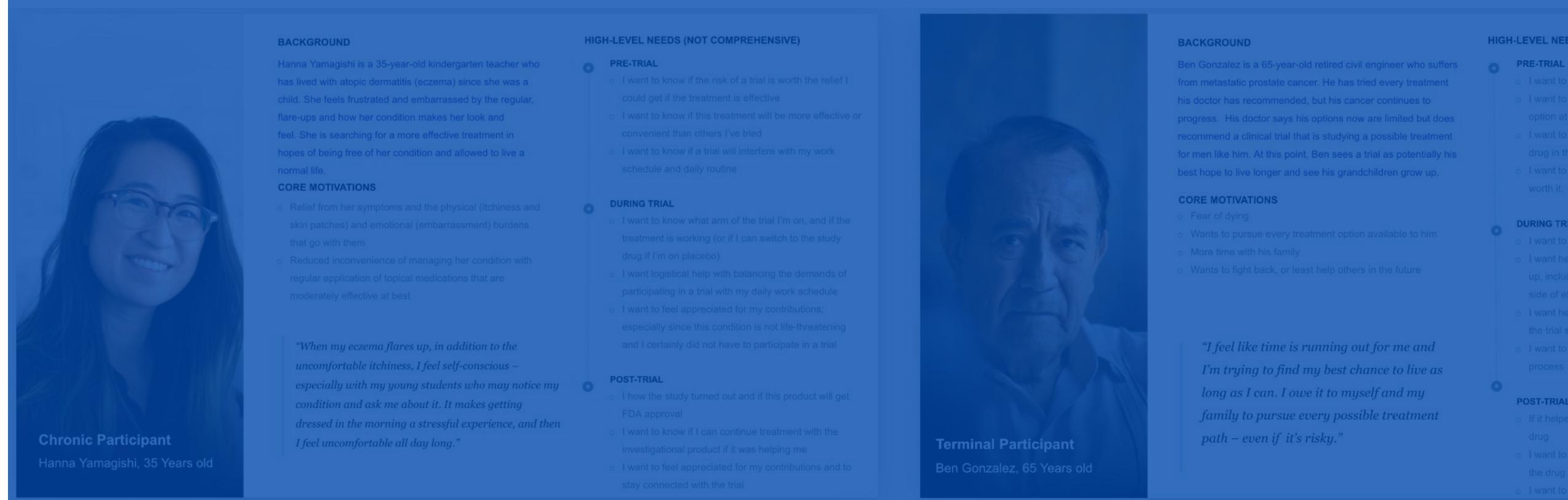
- Design standard
- IA
- Wireframes
- Prototypes
- User Testing

# The Work

Snapshots of work in the Financial Services, Healthcare and Business Development



# Revamp the Clinical Trial Recruitment Online Platform



# About

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Pfizer Global Product Development seek to create a unified digital platform to enhance the recruitment of clinical trial participants and streamline access to studies.

## Problems / Opportunity

- Clinical trial resources were scattered across multiple platforms, hindering efficient access.
- The goal was to unify and consolidate them, enhancing accessibility and user experience.

# Project Activity

Partnered with Pfizer SMEs, Business Stakeholders and Internal cross-functional team to create a clinical trial recruitment platform, using existing research to shape the feature roadmap.



## Research & Strategy

Analyzed research and service blueprints to align with business goals and user needs



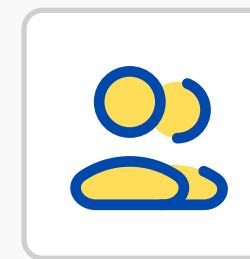
## Info Architecture

Partnered with the Content Strategist to align wireframes with content and IA.



## Design & Prototype

Created user flows and prototypes for usability testing with 20 participants.



## Proto-Persona

Developed proto-personas and journey maps to shape the MVP roadmap.

## Delivery Example

# Designing Find-a-Trial Feature

**Initial User-Goals:** Discover relevant and accurate clinical trials & studies online for adults, **age 40+** with **Chronic** or **terminally ill** patients.

## Key Challenges

The clinicaltrials.gov website's rigid structure and complex language make it difficult for people to easily find and understand information about medical studies.



## Delivery

The proposed solutions focus on improving the user experience of finding clinical trials by simplifying the navigation, allowing for flexible content reuse, and adopting a modern, accessible layout.

Find a Trial (Search feature) via Global Nav

Other touchpoint to find a trial

Clinical Trial Study Page

## Delivery Example

# Pfizer Clinical Trial Units (PCRU)

**User-Goals:** Discover relevant and accurate **phase-1** clinical trials & studies online for **young adults (18-25)** and **healthy volunteers**,



## Key Challenges

Limited API access and manual updates make it difficult to discover studies through the "Find a Trial" tool.



## Delivery

An integrated microsite with tailored content and reused templates can improve discoverability and attract healthy volunteers.

**Clinical Research Unit New Haven**  
Where the journey toward changing patients' lives begins

Many of Pfizer's phase 1 clinical trials take place at the Pfizer Clinical Research Unit (PCRU) in New Haven, Connecticut. The participants in these clinical trials commonly don't have the disease or condition that will later be studied. That's why the participants are called "healthy volunteers."

Healthy volunteers help us understand how a study drug affects the body before people with the condition are treated. This is one way to assess a study drug's safety before giving it to those who have a medical condition.

Healthy volunteers may make a difference as we strive for breakthroughs that change patients' lives. If you're interested in participating, take a look at the PCRU's ongoing clinical trials below.

Interested in participating? View our research unit's clinical trials.

[View our research unit's clinical trials](#)

A look inside our facility

Our clinical research unit is a modern building that includes an entrance, clinical area, and participant

**PCRU Trial Options**

**What to expect**

If you contact us about volunteering at the PCRU, you will speak to one of our staff who will answer your questions and add you to our database of volunteers. If we have a study that may be a fit for you, you will be invited to attend a screening visit at our facility in New Haven, CT. If you qualify for the study, there may be a period of up to 28 days before dosing begins.

For specific studies, there may be the following amenities available for our Japanese participants:

- Japanese staff and language support
- Japanese food
- Japanese comic books, games, movies, etc.

Required overnight stays  
Varies by study

Long-term follow up  
Varies by study

How long is this study?  
Varies by study

Compensation  
Varies by study

Safety remains our top priority at the PCRU during COVID-19. Here's how we're keeping participants and staff safe >

**Interested in participating?**

\* required

First name\*  
John

Last name\*  
Doe

**PCRU Landing Page**

**Clinical Research Unit New Haven**

**About this study**

**Japanese >**

The Pfizer Clinical Research Unit is seeking healthy Japanese volunteers for upcoming studies. Healthy volunteers in clinical trials help us understand how a study drug affects the body. This is one way to assess a study drug's safety before giving it to those who have a medical condition.

Japanese participants help our treatments reach Japanese patients around the world faster and truly make a difference as we strive for breakthroughs that change patients' lives. If you're interested in participating in one of our studies, call us or complete our contact form below. We look forward to hearing from you!

**PCRU Study Page**

**Find-a-Trial feature  
in the first 2-2.5  
months**

Since the first product  
release



**20+%**  
Avg Pg view

**60%**  
Click-Thru-Rates

### **Client Satisfactions**

*Your steady approach,  
responsiveness, and creative skills  
were invaluable to the team*

*Received the highest score during  
a focus group comparison of  
clinical trial websites.*

**Resulted in**  
**1 Year, Contract  
Extension**

### **Key Outcomes & Feedback**

- **Strong user-engagements:** Average of 20+% page-views per user in the first 2-2.5 months since the product launch over other pages and 60% click-through rate demonstrates strong.
- **Client Satisfaction:** Client praises the project for its effective design and positive impact on clinical trial websites, which led to contract extension.



# Card-as-a-Service (CaaS)

A woman with curly hair, smiling, is in the background. In the foreground, a tablet screen displays the Capital One CaaS landing page. The page features a dark background with a smiling woman in the background. The text "A finance infrastructure for the platform economy" is displayed, along with a subtext "Embed financial experiences seamlessly in your brand using the same services powering Capital One". Two buttons are present: "Get Started" (dark blue) and "Learn More" (white). At the bottom, three icons are shown: a trophy for "Powerful", a gear for "Integrated", and a bicycle for "Scalable".

A finance infrastructure  
for the platform economy

Embed financial experiences seamlessly  
in your brand using the same services  
powering Capital One

Get Started      Learn More

Powerful      Integrated      Scalable

# About



As part of their larger tech transformation strategy, a financial services company was creating a new business model, Card-as-a-Service (CaaS), to increase revenue and explore new business opportunities

## Problems / Opportunity

- To provide a real-time, intelligent Card-as-a-Service platform designed to help digital-first companies attract customers and boost revenue.
- Through innovative lending, payment, and loyalty solutions, supported by top-tier data, virtual wallets, and fraud prevention capabilities

# Project Activity

My role revolved around assessing the product-market fit for the financial services new Line of Business product by conducting research, gathering stakeholder insights, and developing user-centered proof of concept to get buy-in from the project sponsor and informed scoping.



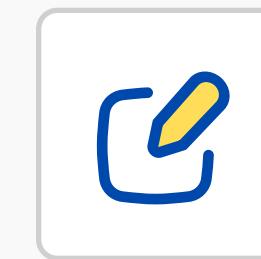
## Current State Assessment

Gathered information on internal and external API integrations.



## Proof of Concepts Development

Used visual aids (wires, process flows, visual design concepts) to show how the Embedded Finance Proof of Concept could be leveraged internally and externally.



## Stakeholder Interviews

Gathered insights from B2B partnerships, credit approval, and API integration teams to understand platform requirements.



## Archetypes Development

Created user archetypes to represent different user segments and their product experiences.

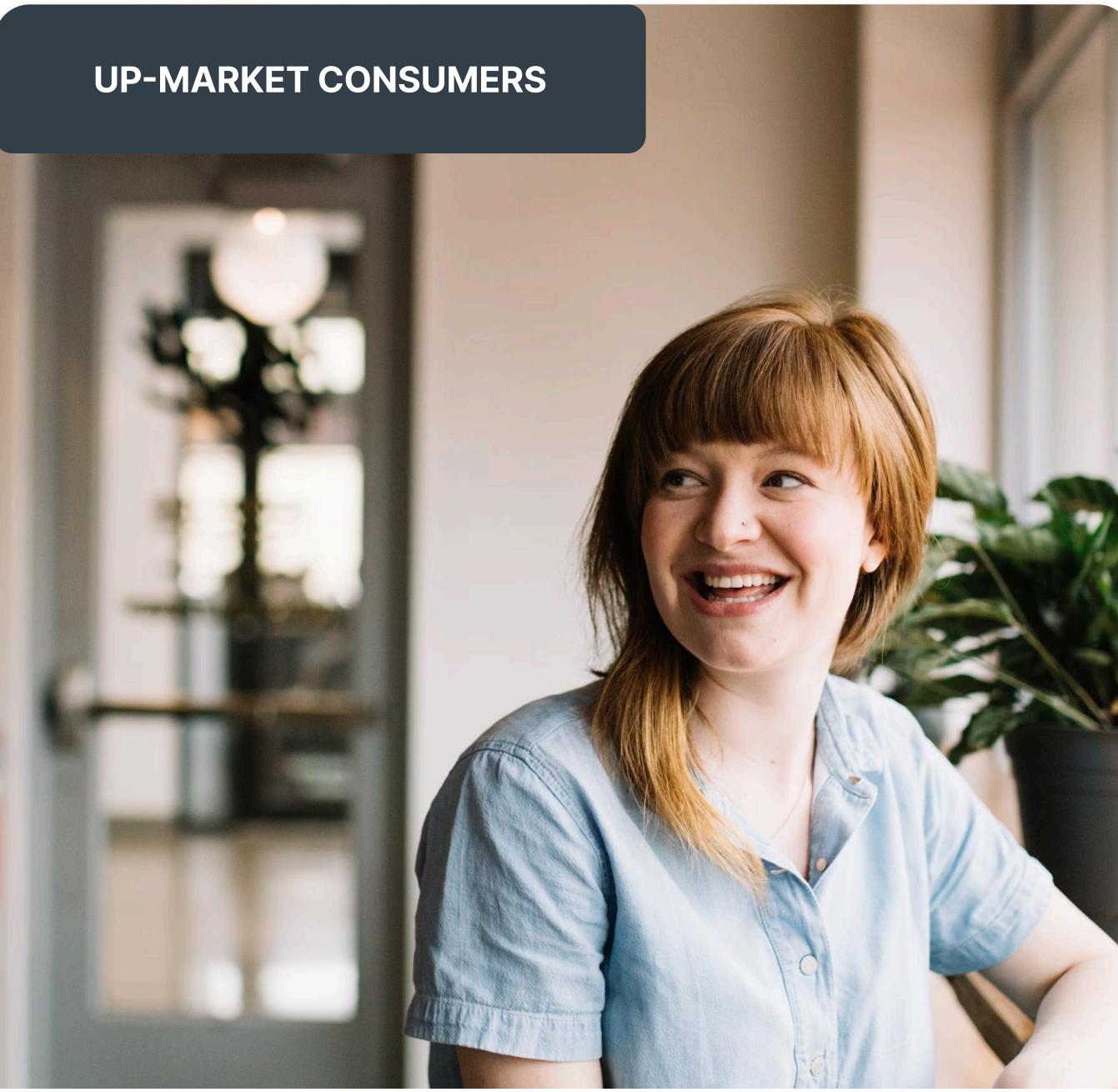
# Target Audience

MERCHANTS



Identify their needs around payment and loyalty products, helping to refine concepts that would resonate with this business segment.

UP-MARKET CONSUMERS



7-day online diary study to gain insights into their behaviors and preferences related to credit and loyalty payment options.

TECH EXECUTIVES / LEADS



direct interviews to helps us better understand the general expectation for piloting the tool, the risk, basic feature and documentation.

## Delivery Example

# Co-Branding & Loyalty Construct



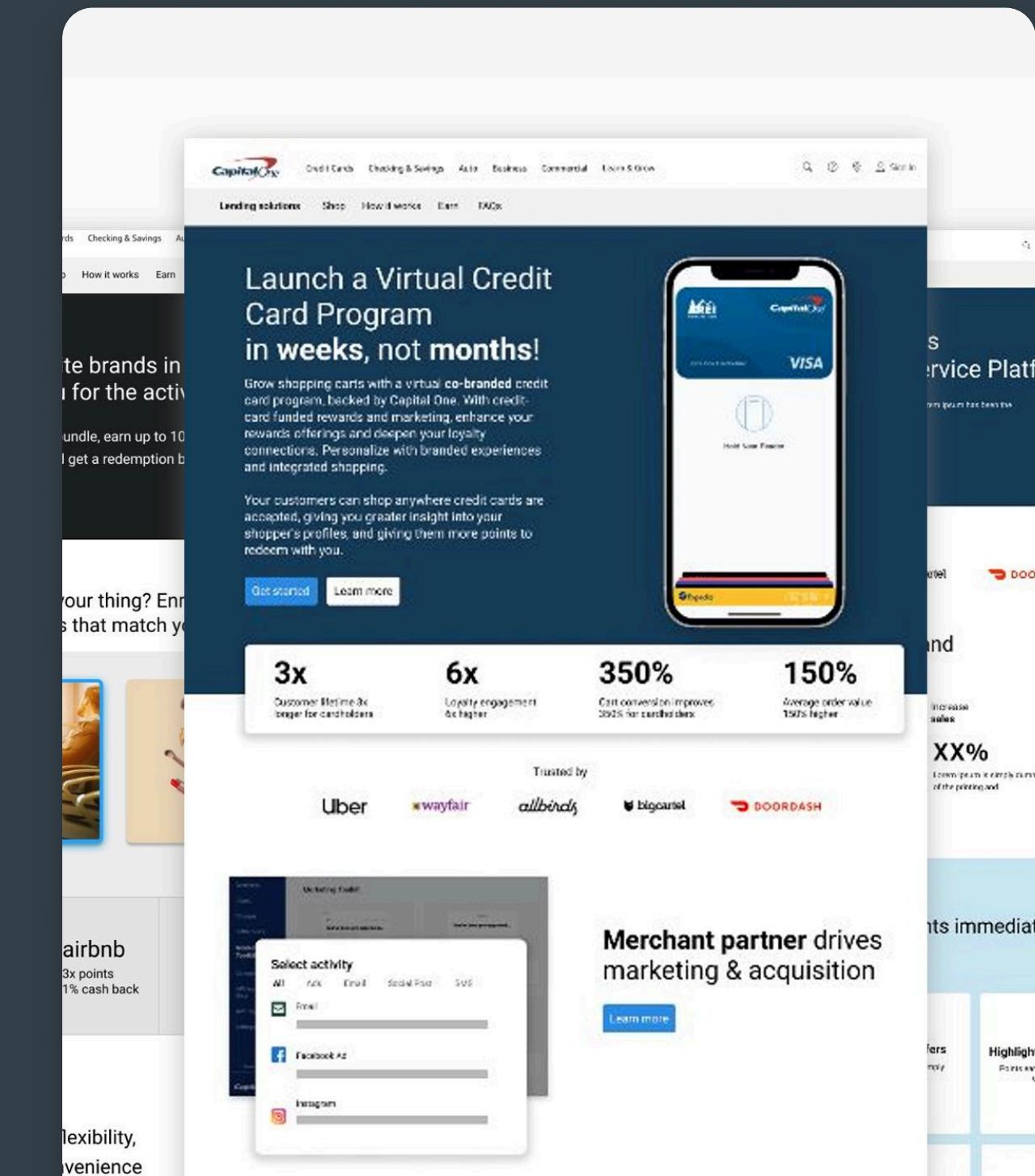
## Key Activity

Over 3 weeks, observations of 2 archetypes and the use of visual stimuli in stakeholder interviews reinforced the proof of concept and facilitated meaningful discussions.



## Key Learning

Merchants are interested in the transaction data and co-branding with the financial services company are seen as a strength but are hesitant to pilot due to concerns about revenue sharing, business fit, integration complexity, and a preference for shorter contracts



### Co-Branding Loyalty Concepts

#### MERCHANTS



Identify their needs around payment and loyalty products, helping to refine concepts that would resonate with this business segment.

#### UP-MARKET CONSUMERS



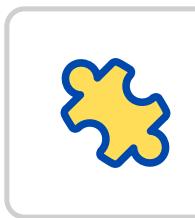
## Next Step

The feedback help guides strategic direction in our product discovery process

7-day online diary study to gain insights into their behaviors and preferences related to credit and loyalty payment options.

## Delivery Example

# Seamless API Integration



## Key Challenges

Merchants were hesitant to pilot due to concerns about revenue sharing, business fit, integration complexity, and a preference for shorter contracts



## Delivery

- Interviewed tech leaders in online retail to gather insights on API integration.
- Produced interactive prototypes to showcase end-to-end integration.
- Delivered a comprehensive API integration flow to clarify scope and timeline for tech partners.

The feature you're requesting requires an enterprise sandbox. **It's free**, we just require some additional information.

Prospect sandbox	Enterprise sandbox	Staging	Production
✓ Access to all APIs in test environment	↳ Everything, plus:	↳ Everything, plus:	↳ Everything, plus:
✓ Manage transaction and test data	✓ Manage team members & roles	✓ Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec massa erat...	✓ Full production access to accepted product integrations
	✓ Enhanced reporting		
	✓ 3rd party data integrations		

**PRICING & TERMS**

Free	Enterprise	Staging	Production
Requires: minimal product data and accepted	Free	For product pricing	For product pricing

**Your current environment**

Use our latest technology to manage B2B payments

**Start Building Now** **View Documentation & Guides**

**Seamless API Integration**

ACTORS

Once the developers are satisfied, the Admin will then request access to the next environment using the CC website

ACTIVITY

Role and privilege management (admin, team member)

BUSINESS EPIC

Seamless Transition to QA

SCREENS & FLOW SAMPLES

PRODUCTS AND PLATFORMS (LANDING)

ACTORS

VP of Product, Senior PM

ACTIVITY

VP of Product talks Senior PM at Uber to find an embedded finance product to increase Uber's revenue

BUSINESS EPIC

Landing Page (Document)

SCREENS & FLOW SAMPLES

LANDING PAGE

DOCUMENTATION & TOOLS

UX Process Mapping

**TECH LEADER**

direct interviews to help us better understand the general expectation for pi...

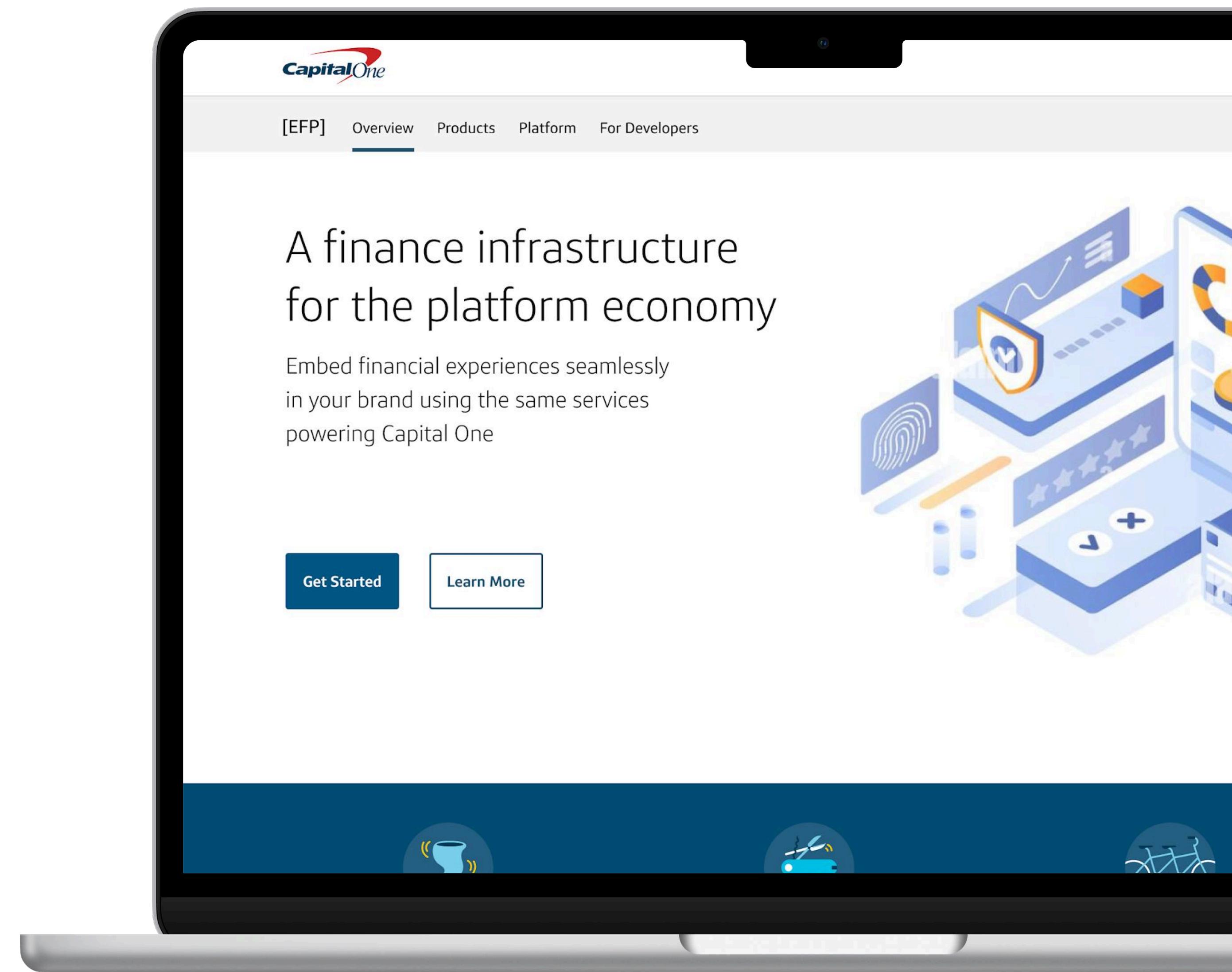
# API Integration Journey with Future Prospects (High-Level)

**Overarching jobs:** Enable seamless business entity creation, API integration, testing, and production deployment, ensuring secure access, role management, and ongoing monitoring for a successful embedded finance partnership.

Authentication & Business Entity	API Credential Issuance	Product Selection & Business Verification	Sandbox & API Testing	QA Environment Setup	Production & Monitoring
<b>TECH &amp; PRODUCT</b>  Senior Dev from XYZ company authenticates and sets up the business entity, establishing their access to Capital One's platform.	<b>TECH</b>  The senior Dev receives API credentials, gaining access to the sandbox environment.	<b>PM &amp; VP OF PRODUCT</b>  PM & Product Leader selects APIs, and the business entity undergoes verification for the integration to proceed.	<b>TECH</b>  The Developers test the APIs in the sandbox, uploading test data to simulate real-world interactions.	<b>TECH</b>  Then prepares the QA environment with different test scenarios to validate API functionality.	  After final QA checks, the system transitions to production with real-time monitoring and alerting.
<b>SYSTEM/TOOLS</b>  Login, Business Entity Registration	<b>SYSTEM/TOOLS</b>  API Credential Management	<b>SYSTEM/TOOLS</b>  API Selection, Contract Management, Verification Tools	<b>SYSTEM/TOOLS</b>  SSO, API Testing Tools, Test Data Upload	<b>SYSTEM/TOOLS</b>  QA System, Testing Request Tools	<b>SYSTEM/TOOLS</b>  Monitoring Dashboard, Production Deployment Tools

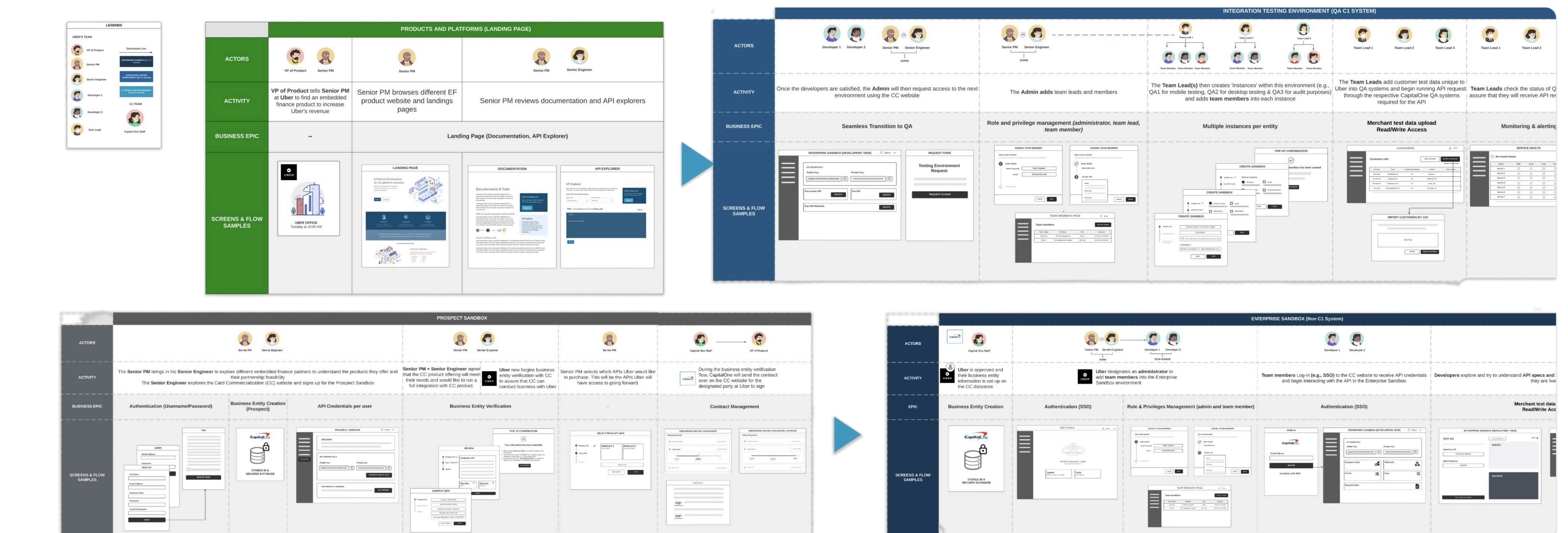
# Interactive Prototypes

Link [here](#)



# User Experience Process Mapping

Developed highly visual service blueprint to inform Scope and Functional Requirements

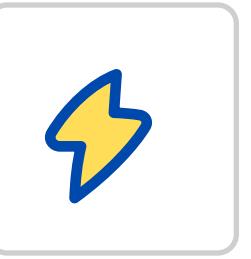


# Key Outcomes



## Enhanced Clarity & Alignment

Using design stimuli such as user flows, journey maps, and interactive prototypes during stakeholder interviews provided clear visualization, solidifying the initial proof of concept and fostering deeper understanding.



## Improved Collaboration & Decision Making

Visualizing abstract ideas early on encouraged more meaningful discussions among stakeholders, helping to clarify the concept and ensure alignment during critical project phases.

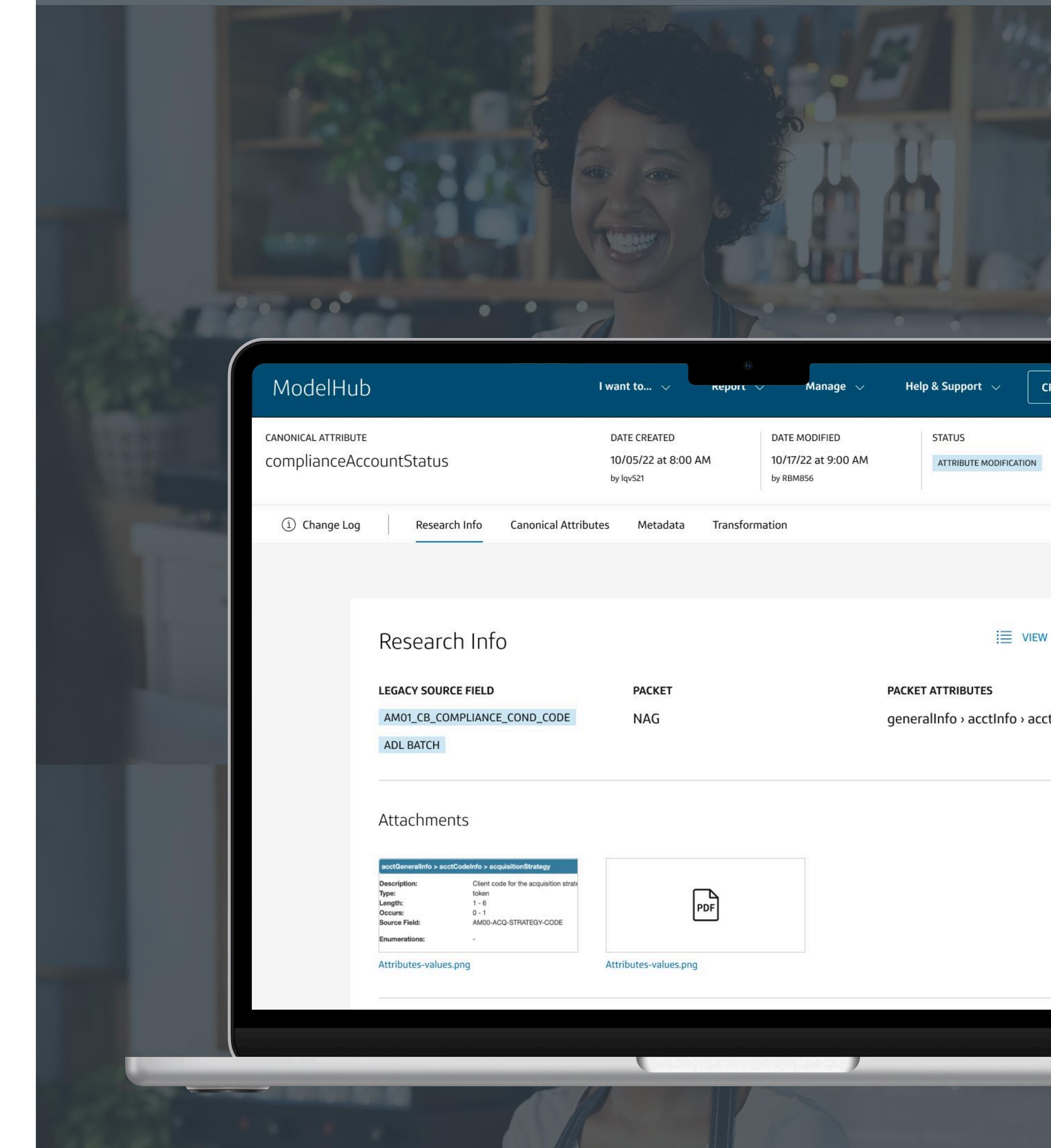


## Successful End-to-End Integration

Delivered a seamless API integration flow from sandbox to production, effectively informing scope and timeline for tech partners, ensuring smooth project execution.



# Data Modeling Revamp



# About



The Core Data team was looking to improve their existing Data Modeling platform, the Model Hub (MH). MH were used by two types of users - Data Analysts and Data Modelers - and aims to be a one-stop place for managing data modeling.

## Problems / Opportunity

To provide reliable data output and reduce the reliance on a third-party data modeling platform called TSYS.

# Project Activity

Partnered with Capital One's Core Data Product Manager to enhance their existing Data Modeling platform, Model Hub. I helped the team by optimizing and testing the platform with end-users, leveraging their feedback to improve the overall user experience.



## Current State

### Assessment

Reviewed prior research and service blueprint to ensure alignment on business context, product requirements, and user needs.



## Design & Prototypes

Developed high-fidelity wire and concepts, grounded from the previous research to prep for the Usability Testing.



## Usability Testing

Led end-to-end research, including planning, stakeholder interviews with Data Analysts and Modelers, and collaborated with product and tech partners to synthesize insights and ideate solutions.



## Socialization

Shared the report with the product, tech and business stakeholders.

## Delivery Example

# Optimizing Data Modeling Experience

## Challenges



- Inconsistent source data and packet referencing
- Inadequate attribute search function
- Unfriendly change log interface
- Issues with attribute hierarchy
- Lack of attribute saving function

## Delivery



The solutions streamlined attribute search and filtering, simplified adding and managing attributes, improved attribute identification and saving, optimized attribute editing, and enhanced change log management for better efficiency and control.

## ModelHub

Status

114 Results found for “Status”

Show results per page

20

21 – 100 of

□	ATTRIBUTES	ENTITY	LAST UPDATED	STATUS	NEXT PHASE
□	CANONICAL ATTRIBUTE complianceAccountStatus	Participants	10/20/22 AT 9:00 AM By RBM856	ATTRIBUTE MODIFICATION	INTERNAL PEER REVIEW

## ModelHub

Hello, what would you like to do today?

SEARCH & MODIFY   CREATE NEW ATTRIBUTES

Search an Attributes

SEARCH   ALL FILTER

# Interactive Prototypes

Link [here](#)

Create New Attributes

Download Template Bulk

Research Info

The Attributes

- Canonical Attributes
- Metadata

Transformation

Add Transformation

Rule Name complianceAccountStatus\_Forward

Rule Type Forward

Rule Definition

```
If AM01_CB_CARD_TRACKER = 'L' (match for the primary's record)  
If AM01_CB_COMPLIANCE_COND_CODE != Nulls and != space and != "" (not empty)
```

- +

CLEAR ALL

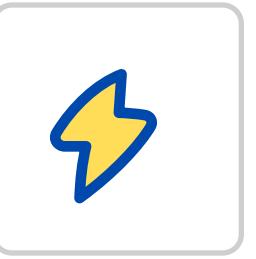
SAVE AS DRAFT

# Key Outcomes



## User-Centered Optimization

Revamped the Data Modeling Hub using insights from data analysts, modelers, and SMEs to address key pain points and improve overall user experience



## Enhanced Efficiency

Simplified data attribute reviews and modifications for modelers while streamlining new attribute requests for analysts, improving workflow efficiency.

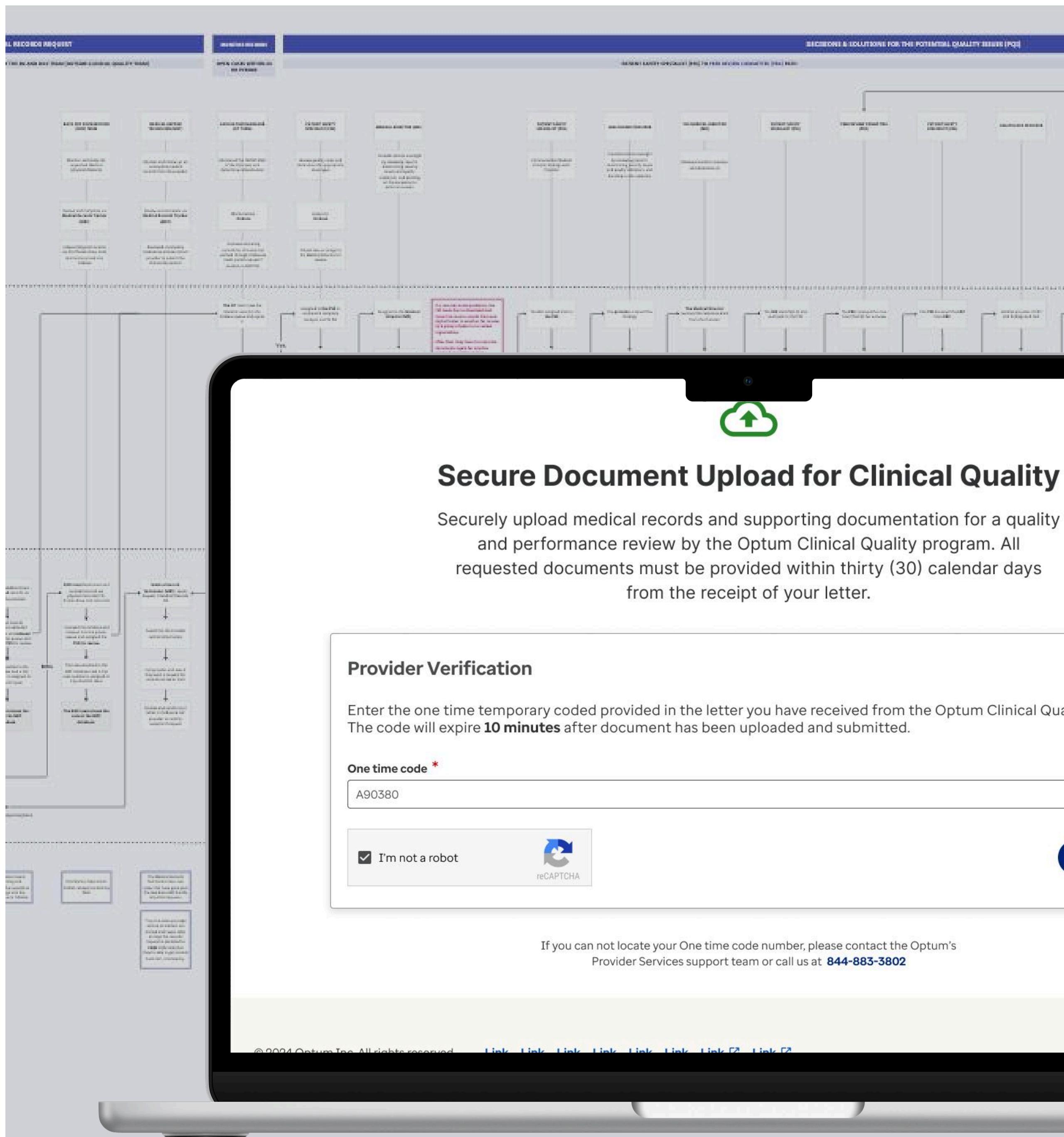


## Targeted Improvements

Improved attribute search, creation, and editing features, directly addressing the primary challenges faced by data modelers and analysts.



# Re-Design the Clinical Quality Tool



# About



The Clinical Quality team at a leading Optum Serve aims to enhance their tool for managing Potential Quality Issues (PQI) cases from established sources, supporting timely medical record requests from VA CCN-affiliated providers while meeting VA CCN's turnaround time requirements.

## Problems / Opportunity

- Case intake process is highly manual and time-consuming. Each case takes an average of 4 hours to review and manipulate in a spreadsheet.
- Operational tools are outdated, relying on multiple databases and requiring a significant modernization overhaul.

# Project Activity

This project is complex, requiring in-depth domain knowledge of the end-to-end process from both the user and system perspectives. Cross-functional collaboration with Product, Tech, and Stakeholders was essential to identify user value and find ways to build incrementally.



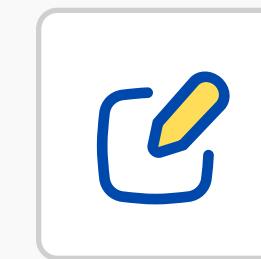
## Product Discovery

Conducted various in-take with direct users and the Subject Matter Experts and acquired domain knowledge, identified challenges and opportunity to innovate.



## Service Blueprint

Created Service Blueprint by outlining the end-to-end journey against the actors, their pain points and the corresponding system that supports their operations.



## Persona Development

Interviewed 10+ Clinical Quality Staff and Leads to understand their touchpoint, journey and challenges in the Clinical Quality Process.

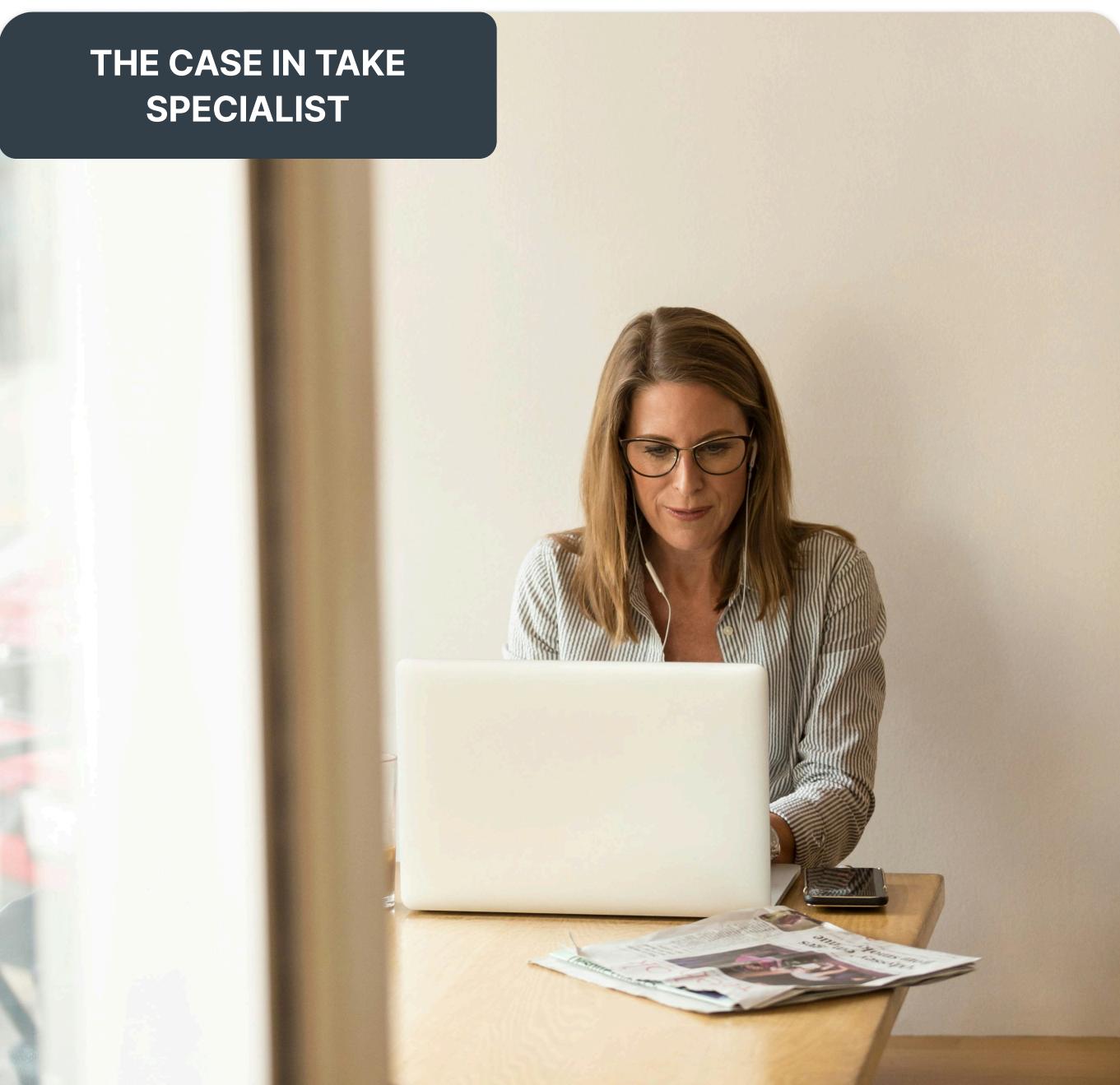


## Partnership with the Product & Tech

Collaboration within the Product trio was essential for determining value and scope to build the experience incrementally to maximize value while minimizing effort.

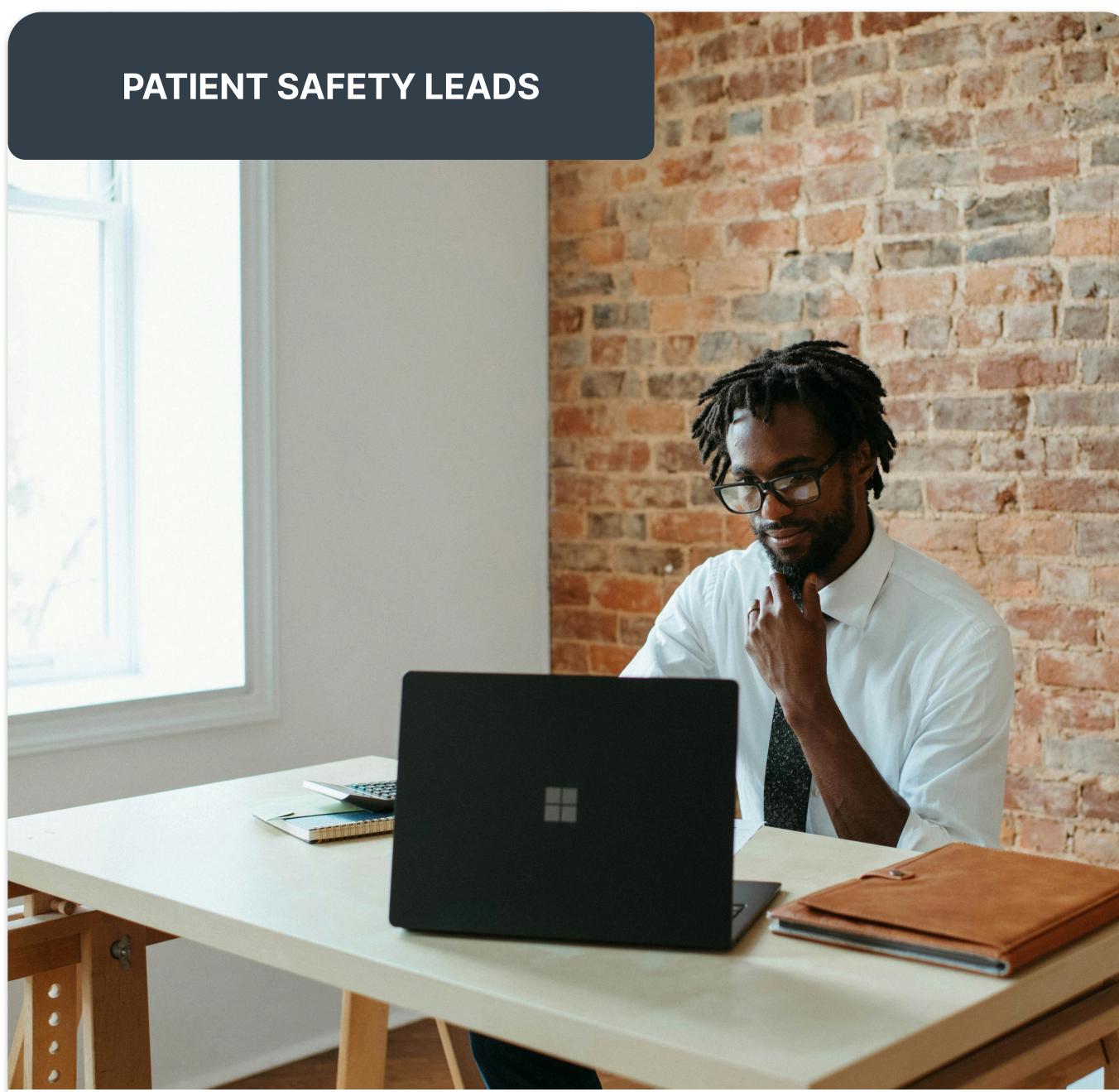
# Clinical Quality Team's Persona

## THE CASE IN TAKE SPECIALIST



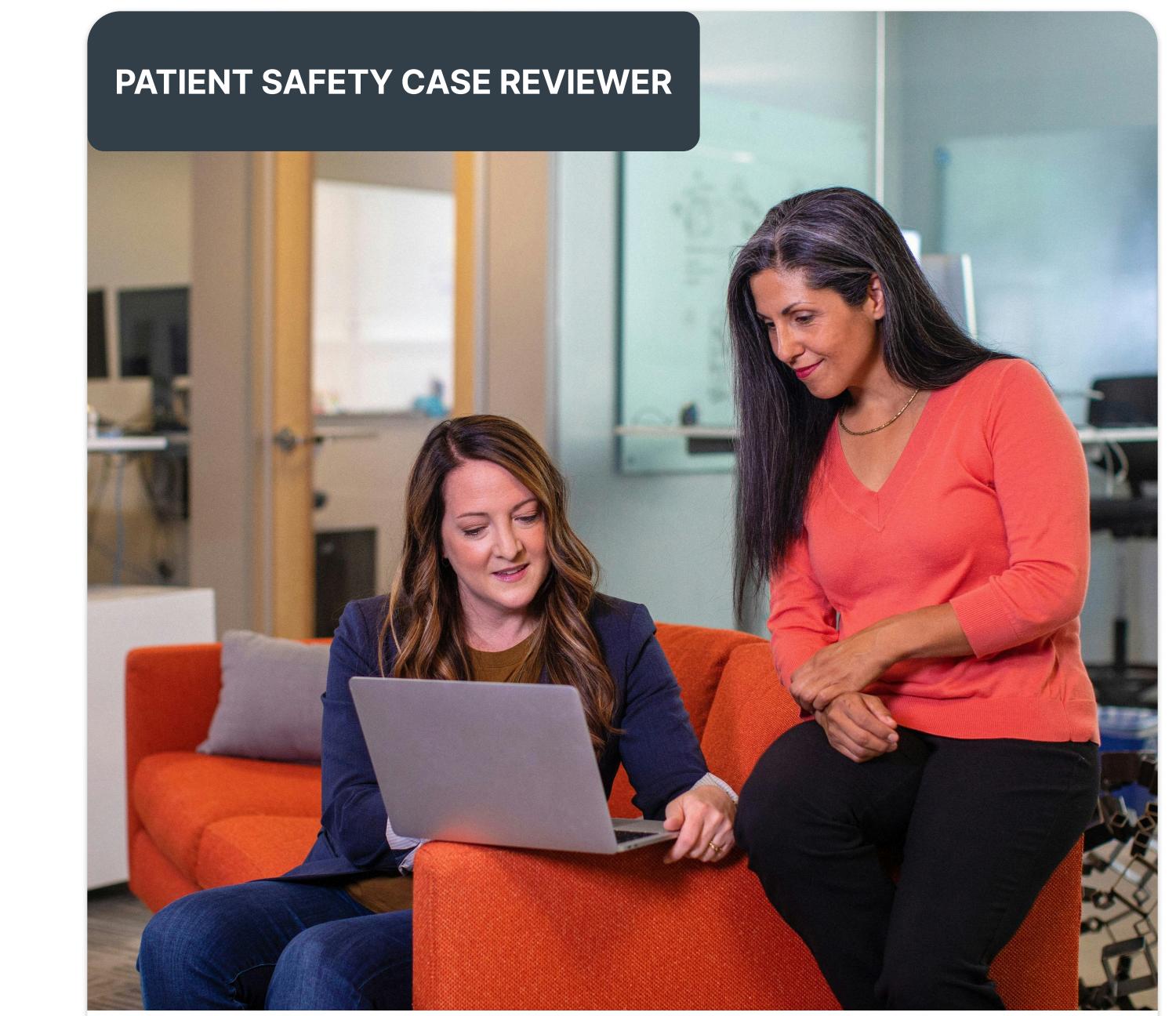
The Case Intake Specialist, a key part of the Patient Safety team, reviews, receives, and prepares PQI cases before they are triaged by the Patient Safety Specialis

## PATIENT SAFETY LEADS



Responsible for ensuring patient safety by managing care quality, handling case intake, review, and resolution, and ensuring regulatory and organizational compliance.

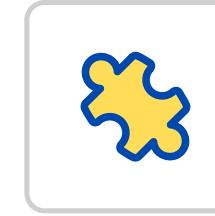
## PATIENT SAFETY CASE REVIEWER



The Patient Safety Specialist (Case Reviewer), conduct case reviews including collecting and triage case info ensuring the case hand over to the appropriate providers and medical counsels.

## Delivery Example

# Clinical Quality Case-In-Take



## Key Challenges

Clinical quality patient safety specialists spend 3-4 hours manually updating reports for database import, a labor-intensive process prone to human error and potential data entry mistakes.



## Solutions

Design the user experience to support automation capability to standardized PQI cases, leverage specialists' technical capabilities, and enable processing of structured ERA team data.

 <p><b>Patient Safety Lead</b> Medical Surgical</p> <p><b>Patient Safety Leads (PSLs)</b> are responsible for ensuring patient safety by managing and overseeing the quality of care and service processes. They handle case intake, review, and resolution, ensuring compliance with regulations and organizational standards.</p>		<p><b>JOBS TO BE DONE</b></p> <ul style="list-style-type: none"> <li>Generates detailed case reports.</li> <li>Manages the entire case process from intake to resolution.</li> <li>Monitors case progress for Patient Safety Specialists.</li> <li>Conducts regular compliance and quality audits.</li> <li>Provides training and mentorship for Patient Safety Specialists.</li> <li>Handles claim queries</li> </ul> <p><b>NEEDS</b></p> <ul style="list-style-type: none"> <li>Meet organizational and contractual KPIs</li> <li>Integrated, user-friendly systems for case management.</li> <li>Efficient tools for generating and manipulating reports.</li> <li>Clear communication channels with the VA and other stakeholders.</li> </ul> <p><b>GOALS</b></p> <ul style="list-style-type: none"> <li>Close 95% of cases within 90 days and 99% within 180 days.</li> <li>Ensure accurate and timely case resolution.</li> <li>Maintain high standards of patient safety and quality care.</li> </ul> <p><b>DESIRABLE OUTCOMES</b></p> <ul style="list-style-type: none"> <li>Reduced case-in-take time spent.</li> <li>Timely Report turn around</li> </ul>	
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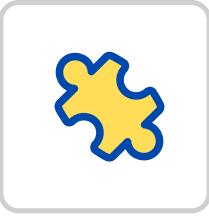
## Secure Report Upload for Clinical Quality

Upload ERA (AHRQ or HAC) reports for the system to process, making them ready import into the Potential Quality Indicator (PQI) Database. Only .xlsx file types are accepted, max 10MB.

<p><b>REPORT UPLOAD</b></p> <p><b>Upload the Report *</b> Accepted file types: .xlsx, ≤10MB</p> <p>Select file File status message goes here</p> <p>Place files on the drop area to upload</p>	
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# Delivery Example

# Clinical Quality Case Management



# Key Challenges

Clinical quality patient safety specialists spend 3-4 hours manually updating reports for database import, a labor-intensive process prone to human error and potential data entry mistakes.



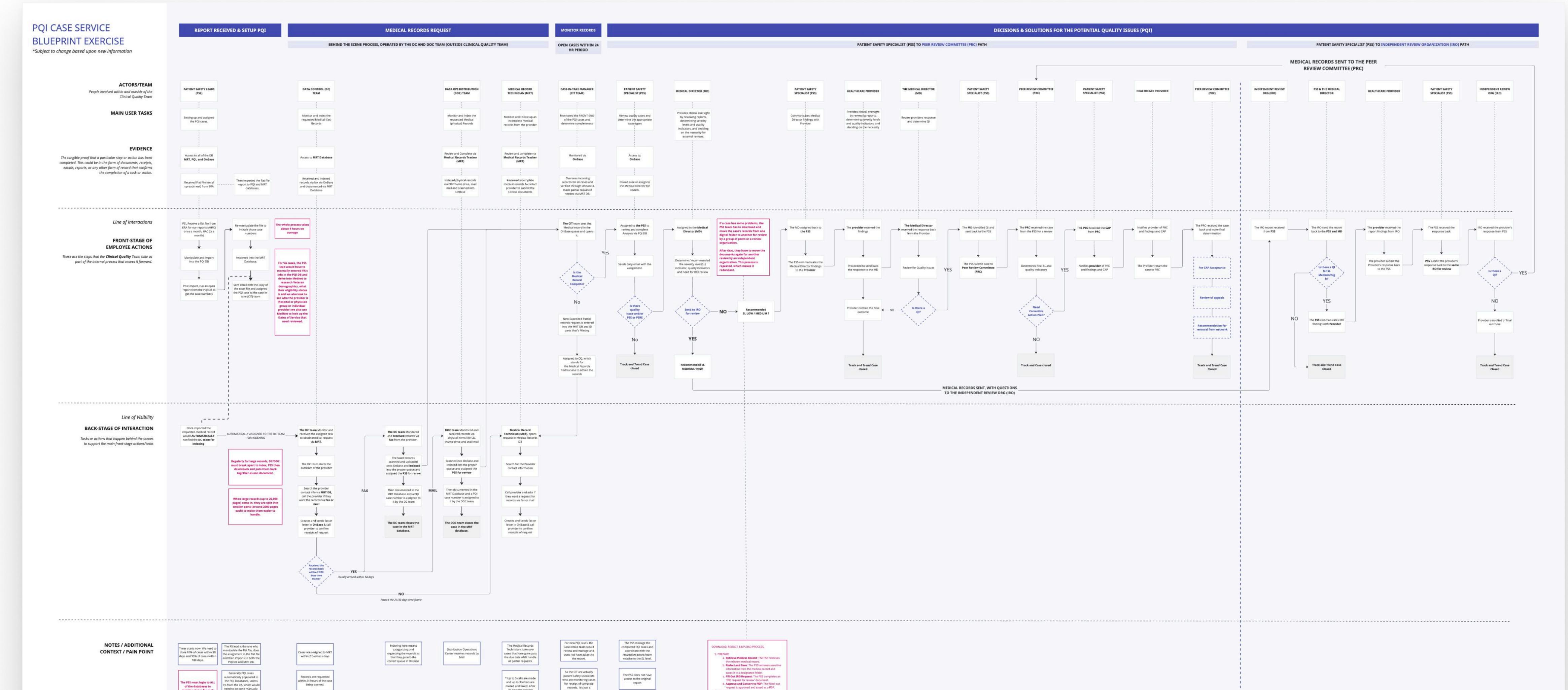
# Solutions

Design the user experience to support automation capability to standardized PQI cases, leverage specialists' technical capabilities, and enable processing of structured ERA team data.

## Delivery Example

# End-to-End Service Blueprint

[View in detail here](#)



**Business Development**

# **Public Services Walking Deck Development**



# About

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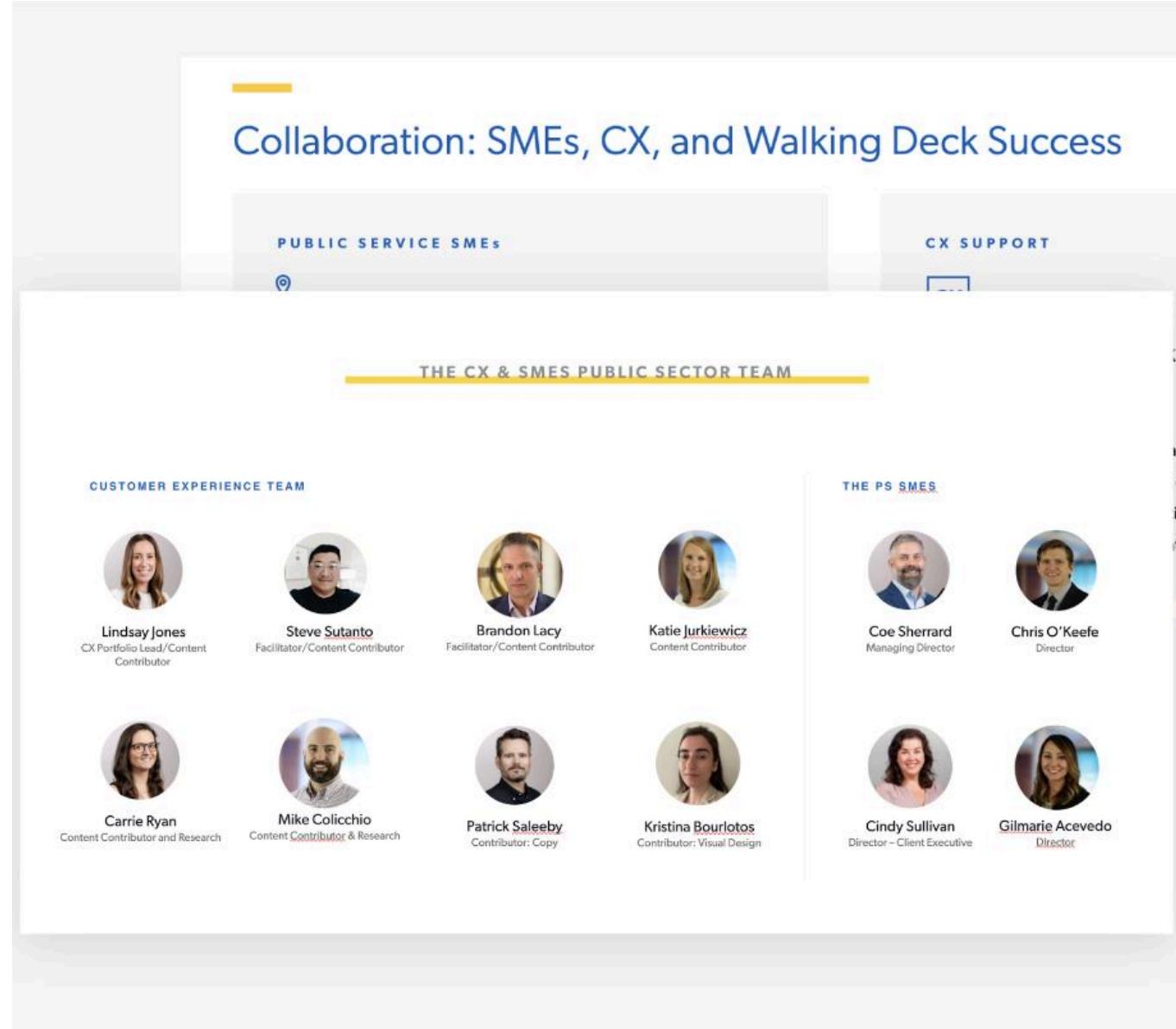
Teamed up with Public Sector's Portfolio team at CapTech to develop on-the-go pitch and proposal content, aiming to enhance their portfolio strategy to sell and win work.

## Problems / Opportunity

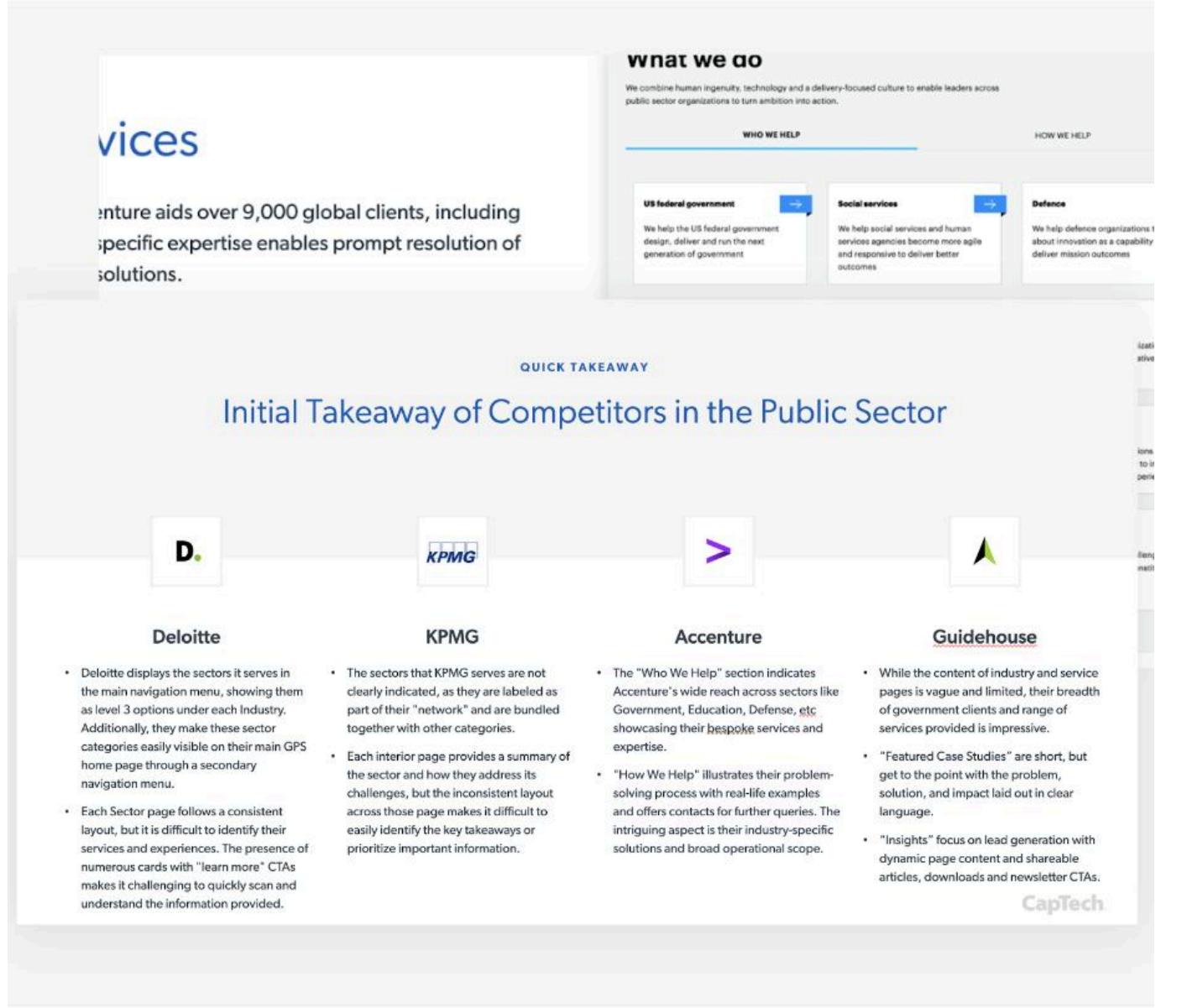
The public sector team struggles to unify their messaging around expertise, services, and experience, despite having strong thought leadership, client stories, and proposals.

**Outcome:** Unified fragmented content into clear, cohesive messaging that drove significant account growth by strategically collaborating with account executives

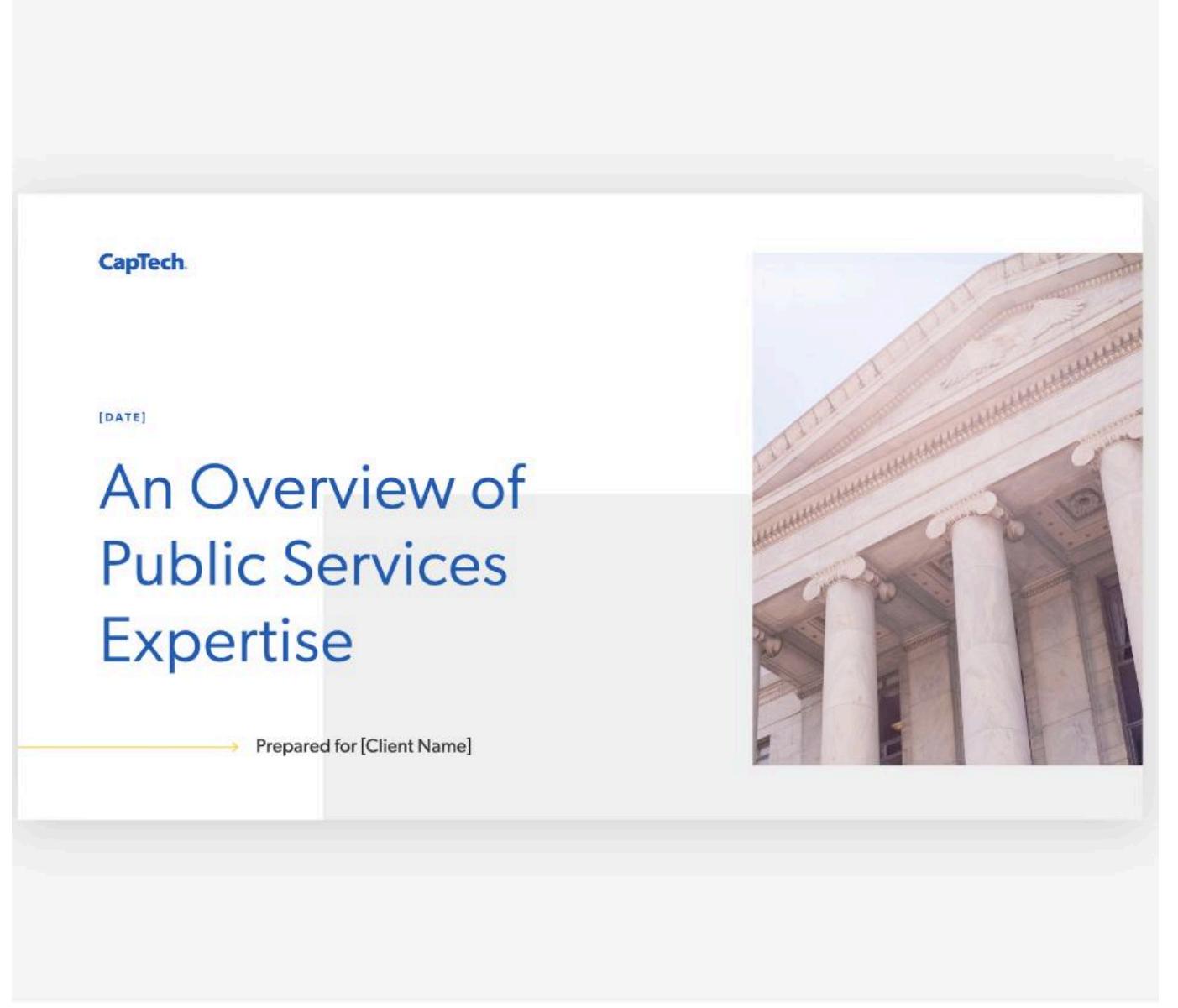
# Approach & Delivery



This image shows a digital interface for a 'Walking Deck' presentation. The title 'Collaboration: SMEs, CX, and Walking Deck Success' is at the top. Below it, there are three main sections: 'PUBLIC SERVICE SMEs' (with a 'View Deck' button), 'CX SUPPORT' (with a 'View Deck' button), and 'THE CX & SMES PUBLIC SECTOR TEAM' (with a 'View Deck' button). The 'THE CX & SMES PUBLIC SECTOR TEAM' section contains a grid of 12 team member profiles, each with a photo, name, and title. The profiles are organized into three columns: 'CUSTOMER EXPERIENCE TEAM' (Lindsay Jones, Steve Sutanto, Brandon Lacy, Katie Jurkiewicz, Coe Sherrard, Chris O'Keefe), 'THE PS SMES' (Carrie Ryan, Mike Colicchio, Patrick Saleby, Kristina Bourlotos, Cindy Sullivan, Gilmarie Acevedo), and 'CX SUPPORT' (not fully visible).



This image shows a competitive analysis slide titled 'Initial Takeaway of Competitors in the Public Sector'. It features four company logos: Deloitte, KPMG, Accenture, and Guidehouse. Below each logo is a list of observations. For example, under Deloitte, it says: 'Deloitte displays the sectors it serves in the main navigation menu, showing them as level 3 menus under each industry. Additionally, they make these sector categories easily visible on their main GPS home page through a secondary navigation menu.' The slide is branded with 'CapTech' at the bottom right.



This image shows a presentation slide titled 'An Overview of Public Services Expertise'. It features a large image of a classical building with columns on the right. The slide has a 'CapTech' header and a 'DATE' placeholder. The main content area contains the title 'An Overview of Public Services Expertise' and a 'Prepared for [Client Name]' footer. The slide is branded with 'CapTech' at the bottom right.

## Team Formation

Defined collaborative roles between SMEs and CX, resulting in the formation of a specialized team.

## Competitive Analysis

Conducted competitive analysis of major firms to refine sales tactics and content strategies.

## Client Presentation Enhancement:

Developed a Walking Deck for Account Executives to enhance client presentations.

# Project Roadmap and Milestones



01	02	03	04	05	06
Identify the SMEs	Kick off meeting	Cadence	Build	Copy/Design	Pilot
1 week Initial communication with the portfolio leads and the SMEs.	1 week Define the goals, roles expectation of the project, ensuring everyone is on the same page before.	Weekly Organizing regular check-ins ensures to ensure we stay on track, and it sets a rhythm for updates and feedback loops.	3 Weeks Drafting and revising the content with input from SMEs ensures the walking deck is aligned with the envisioned goals and expert insights.	2 Weeks Begin visualizing and finalizing the look and feel of the walking deck. Even in its draft mode, this phase is crucial for consolidating content and design elements.	-- After refining the design and content, the walking deck is prepared for its first real-world exposure. This pilot phase is the initial launch to a smaller audience to gather feedback and insights.

## Delivery Example

# Competitor Research

Evaluate competitors to understand their Public Service selling approach, terminology used, content structure and thought leaderships.



## Focus Content on Key information

## Use Real-Life Examples Wisely

## Engage users & Drive Actions

<b>Deloitte</b>	<b>KPMG</b>	<b>Accenture</b>	<b>Guidehouse</b>
<ul style="list-style-type: none"><li>Deloitte displays the sectors it serves in the main navigation menu, showing them as level 3 options under each Industry. Additionally, they make these sector categories easily visible on their main GPS home page through a secondary navigation menu.</li><li>Each Sector page follows a consistent layout, but it is difficult to identify their services and experiences. The presence of</li></ul>	<ul style="list-style-type: none"><li>The sectors that KPMG serves are not clearly indicated, as they are labeled as part of their "network" and are bundled together with other categories.</li><li>Each interior page provides a summary of the sector and how they address its challenges, but the inconsistent layout across those pages makes it difficult to easily identify the key takeaways or prioritize important information.</li></ul>	<ul style="list-style-type: none"><li>The "Who We Help" section indicates Accenture's wide reach across sectors like Government, Education, Defense, etc. showcasing their bespoke services and expertise.</li><li>"How We Help" illustrates their problem-solving process with real-life examples and offers contacts for further queries. The intriguing aspect is their industry-specific solutions and broad operational scope.</li></ul>	<ul style="list-style-type: none"><li>While the content of industry and service pages is vague and limited, their breadth of government clients and range of services provided is impressive.</li><li>"Featured Case Studies" are short, but get to the point with the problem, solution, and impact laid out in clear language.</li><li>"Insights" focus on lead generation w</li></ul>

## Accenture – Public Services

Their services and capabilities are described using everyday language, clearly specifying the public sectors Accenture serves and the solutions offered. This presentation is compelling and easy to understand, making it straightforward for potential clients to see their experience and approach.

### CONTENT STORY: WHO WE HELP

- Value prop:** We combine human ingenuity, technology, and a delivery-focused culture to enable leaders across public sector organizations to turn ambition into action.
- Overview:** A summary of Accenture's approach in the specific industries, e.g., US Federal, Education, Defense, Public Safety, etc.
- Capabilities:** Detailed description of the services offered in the PS sector.
- Who We Serve:** Showcase of how they have helped clients in the PS sector.
- What we think:** articles or white papers related to the PS industry.

### CONTENT STORY: HOW WE HELP

- Overview:** A summary of what's involved in a specific delivery, approach, and solutions offered
- Case Studies:** Examples of how Accenture has implemented specific delivery in real-world scenarios with clients.
- What we think:** Articles or white papers related to the solutions
- Related Capabilities:** Showcase similar solutions in other spaces.
- Contact Information:** Details on how to contact the team responsible for particular service.

The screenshot shows the Accenture Public Services website. At the top, there is a navigation bar with links for "Who We Help", "How We Help", "Our Stories", "Our People", and "Our Insights". Below this, there is a section titled "Obsess over citizens' needs" with a sub-section "Who We Help". This section includes a "NEW RESEARCH" card for "Talent leaders, agents of public service change" and a grid of cards for different sectors: "US federal government", "Social services", "Defense", "State", "Giles, transport & infrastructure", "Healthcare", "Public safety", "Education", "Transport services", "Manufacturing", "Public health", "Private sector", and "Insights". Each card has a brief description of the services offered in that sector.

## Delivery Example

# The Walking Deck

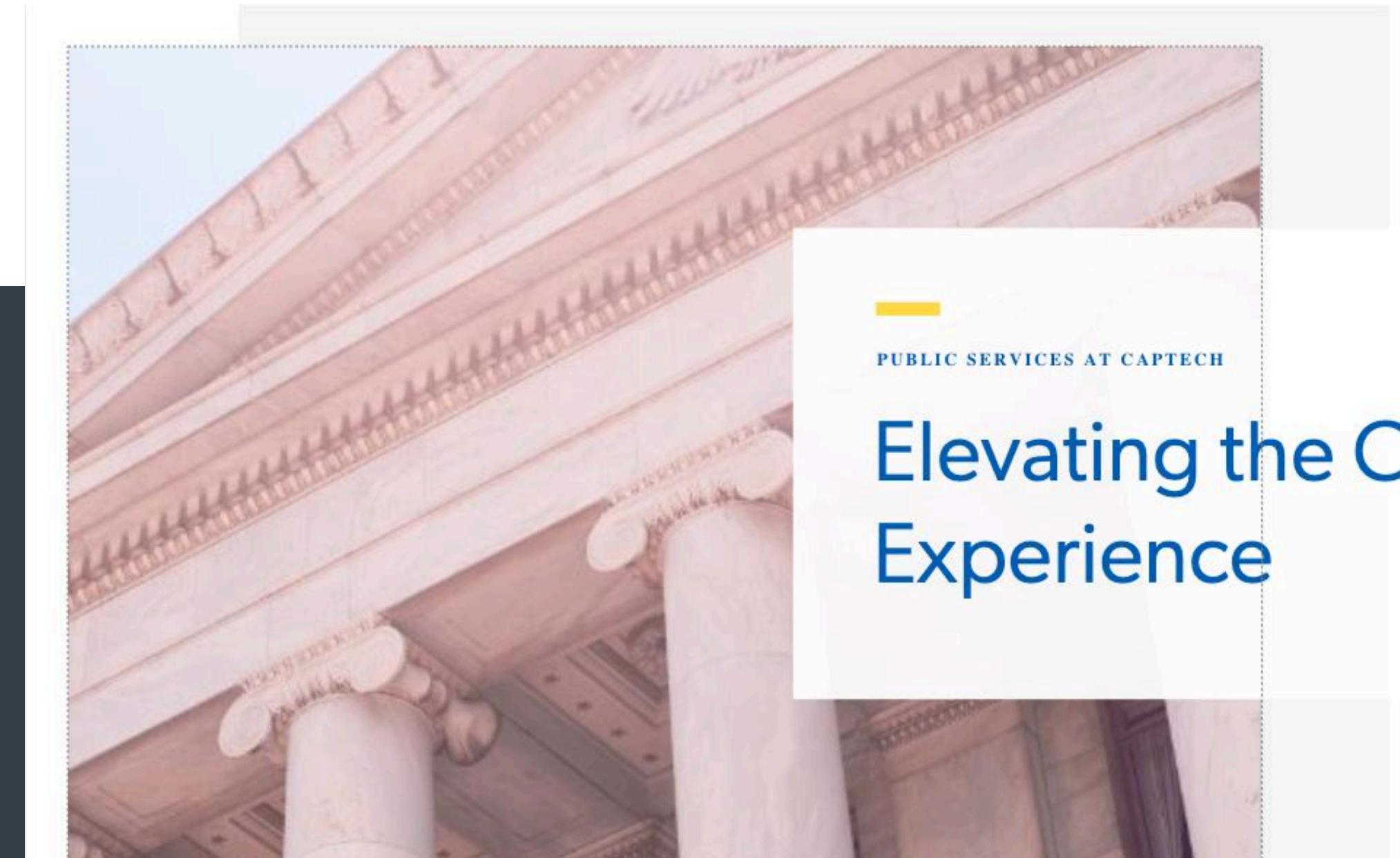
The completion of the first version of the walking deck marked a significant milestone to support growth in the public service portfolio and strengthening the team to sell work and build strategic relationship with clients.



## Compelling Content Story

## a Clear Value Proposition & Industry Expertise

## Fostered Stronger Relationships with the portfolio team



**OUR MODEL FOR SUCCESS**

Support and engage with clients in a variety of ways, from one-off and set series projects to embedded teams.

We deliver meaningful work to our clients through various models and partnership types depending on the roles and objectives.

**WE DRIVE EXCEPTIONAL OUTCOMES**

CapTech offers you **the right people at the right time** to deliver on your biggest business objectives.

**THE BENEFITS TO YOU**

- Proven Expertise**  
Highly skilled talent capable of partnering with existing teams
- Increased Productivity**  
Leveraging the right people to improve delivery velocity and quickly realize business value
- Quality at an Attractive Price Point**  
Engagements are 10W-based (Time & Materials or Fixed Price) with competitive rates
- Effective Knowledge Transfer**  
Successful transition and handoff for sustained long-term success

**CapTech | CLIENT STORY**

**SHEPHERD CENTER**

**Modernizing Education and Safety for Families**

CapTech worked with non-profit Shepherd Center to develop Code & Learn software and mobile applications to help parents play a more active role in driver education, skill practice and most importantly, safety.

**The Details**

- An app with a customizable family agreement and a driving log.
- Engagement components including a graduated driver's license quiz and 10-chapter curriculum.
- An app designed to meet driver education requirements in all 50 states.

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**Creating Intuitive Citizen Interactions**

New technologies empower government agencies to innovate, streamline, and extract value that sparks powerful transformation.

But with equity and privacy concerns, government agencies must find ways to protect the citizen experience.

**PUBLIC SERVICE CHALLENGES:**

- Legacy Systems
- Staffing Challenges
- Paper-Based Processes
- Shifting Political Landscape
- Public Scrutiny
- Complex Regulations

By collaborating closely with clients, we develop tailored solutions that transform citizen engagement and accelerate agency modernization.

**CapTech | CLIENT STORY**

**VIRGINIA DEPARTMENT OF TAXATION**

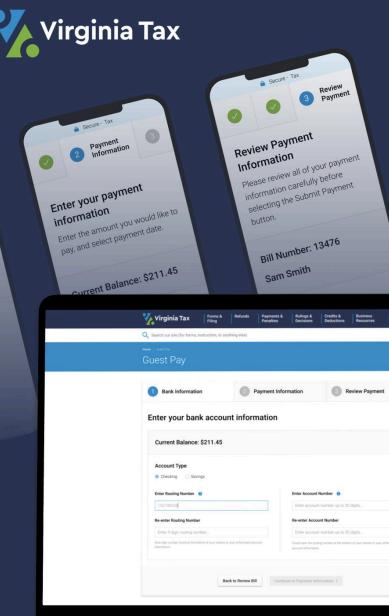
**An Improved Online Experience for Taxpayers**

As part of an ongoing effort to make their website more approachable, the Virginia Department of Taxation turned to a trusted partner, CapTech, to explore ways to make it easier for users – particularly guest users – to make payments online.

**The Details**

- Conducted stakeholder and SME interviews; referenced functional design documents to understand the capabilities and limitations of existing payment applications and inform the creation of high-level concepts, wireframes and screen flows.
- Conducted usability testing with state residents to validate design concepts and uncover additional opportunities to meet user expectations.
- Deliverables included annotated visual designs and a component library for Guest Pay, interactive prototypes for desktop and mobile, and a roadmap with post-MVP guidance and recommendations.
- Now completing a content assessment around payments-related website content and supporting Virginia Tax as they look at implementation options for an unauthenticated Guest Pay experience.

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# Closing

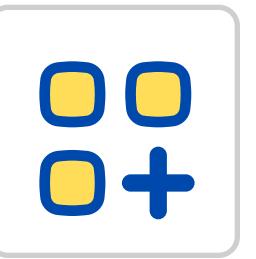
Highlights key aspects of my suitability for the role applied.

# Closing



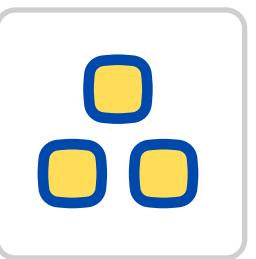
## Relevant Experience

Over 12 years as Product Designer and experiences in highly regulated industries. Also the ability to lead full product design lifecycle from research, strategy, iteration to final delivery.



## Thrives in Complexity

Experienced in designing and delivery for B2C and B2B Online Marketplace and Enterprise Environments SaaS Solutions, with a knack for turning ambiguous problems into user-centered actionable solutions.



## Strategic Collaborator

Strong experience working in collaboration with Product, Engineers and various stakeholders. Additionally, ability lead large-scale design projects, provide guidance to junior designers, and foster a collaborative environment.

# Few Shout outs

“

*I was particularly impressed with Steve's work in the Clinical Quality area. He led efforts with dedication, engaging the team to identify diverse stakeholders and end users in a complex process. His structured approach to discussions and documentation helped clarify customer workflows, uncover pain points, and highlight inefficiencies.*

**Principle UX Lead, Optum**

“

*Steve has shown exceptional intelligence in his client space and was notably worked to bring clarity in a highly visible and quickly changing atmosphere...his designs were top notch, his ability to bring a measured approach to his work as a key skill that sets Steve out from the crowd*

**Product Lead, Airbnb**

“

*What I have especially appreciated about my collaboration with Steve is how he used his natural curiosity to build strong relationships. At the same time, he sought out other AMs so that materials and messaging was developed with multiple perspectives taken into account.*

**Sr. Manager, Management Consultant, CapTech**

“

*Steve has been a consistent and effective driver of progress, guiding the team with thoughtful ideas, content refinement, and regular check-ins to deliver a high-quality final product. His contributions have already been instrumental in client pitches, with long-term potential to secure future work.*

**Product Owner, Auto Industry, Ford Credit**

# Thank you.

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