STEVE SUTANTO

Crafting Experiences: Select UX Stories

Product Design & Strategy • Design Leadership • stevesutanto.co

Agenda

About me

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

The work

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

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.
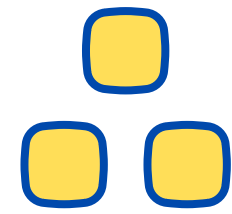
Remote, U.S

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)
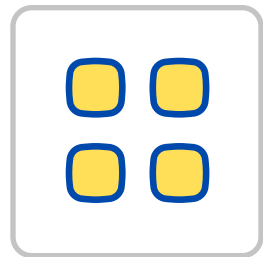
Project Lead

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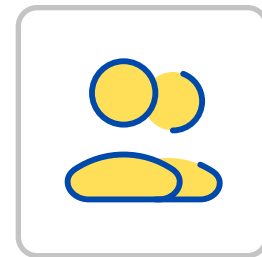
Mentorship

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.
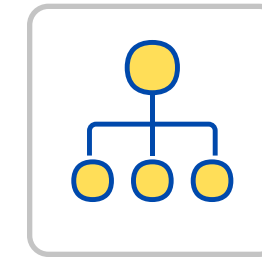
Team Management

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

Pfizer

Revamp the Clinical Trial Recruitment Online Platform
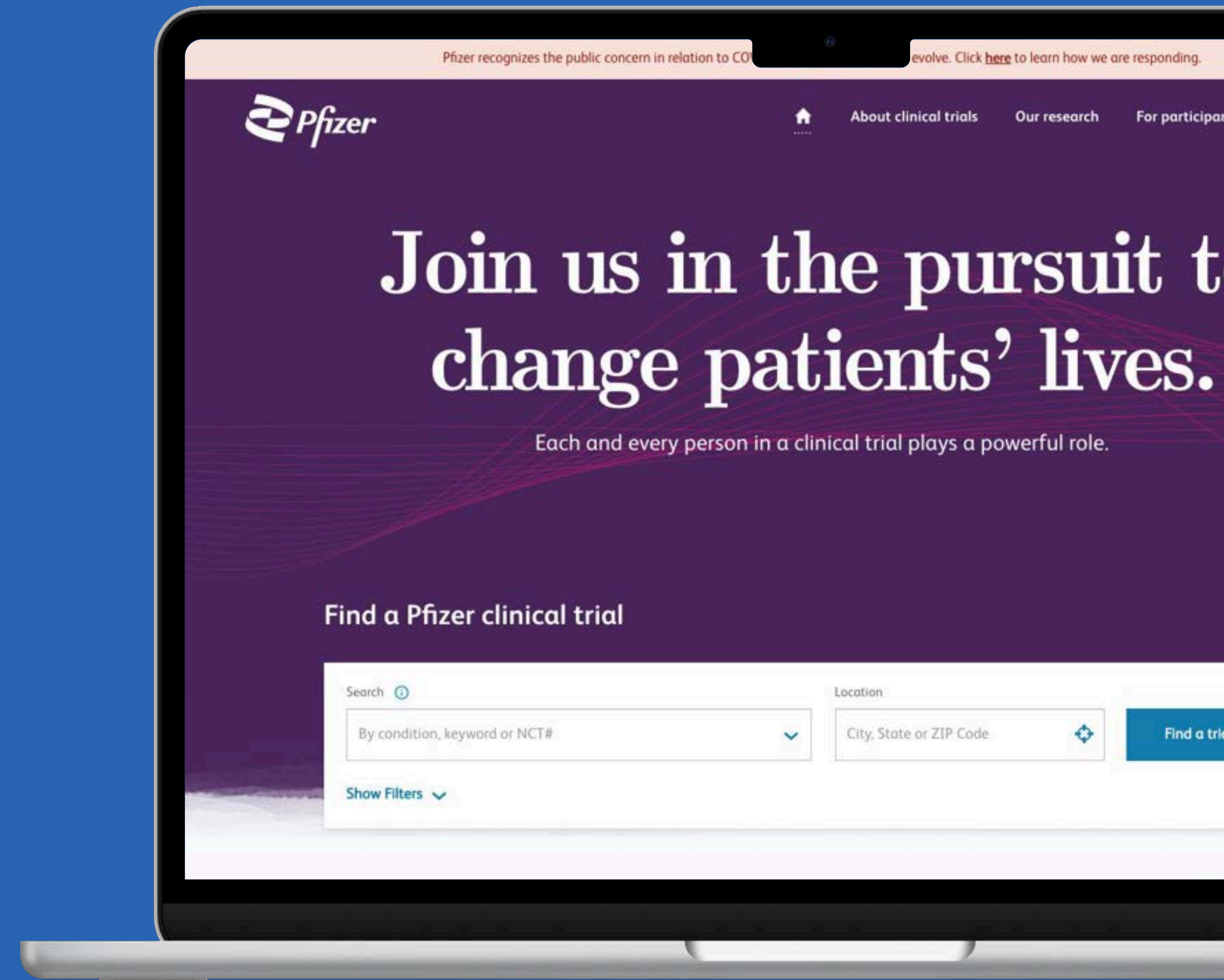
About

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.
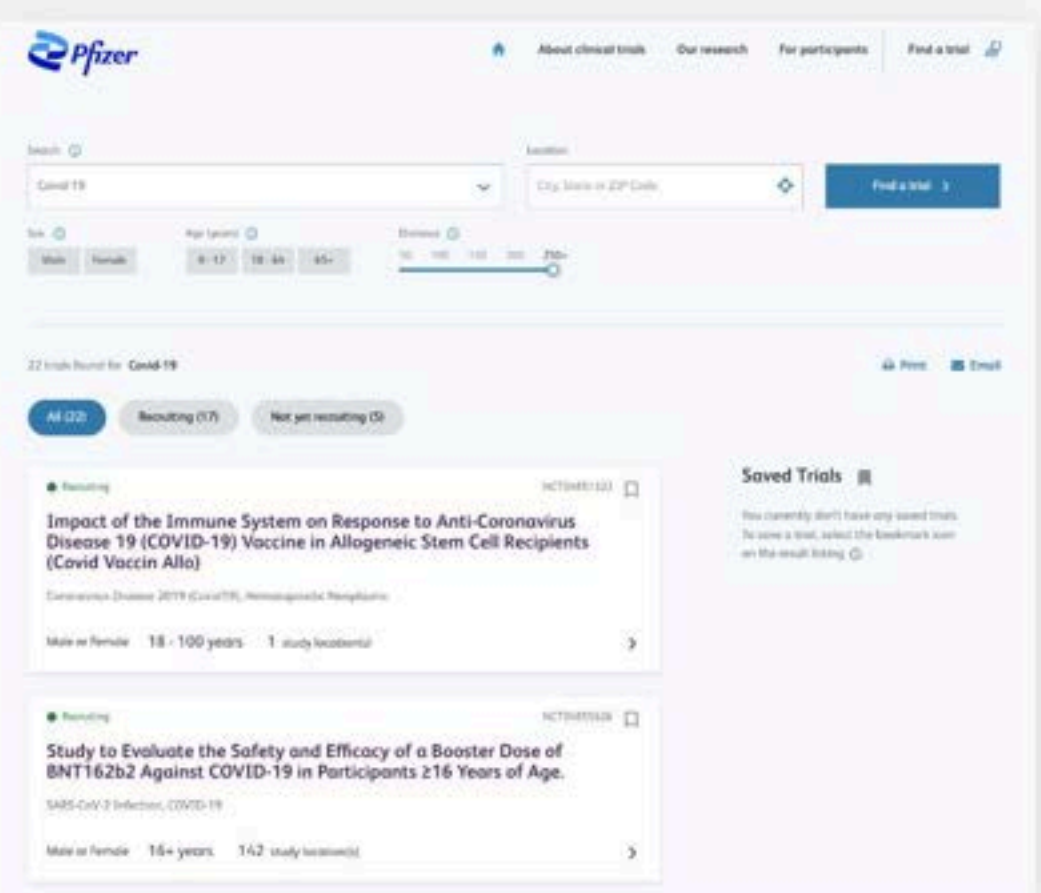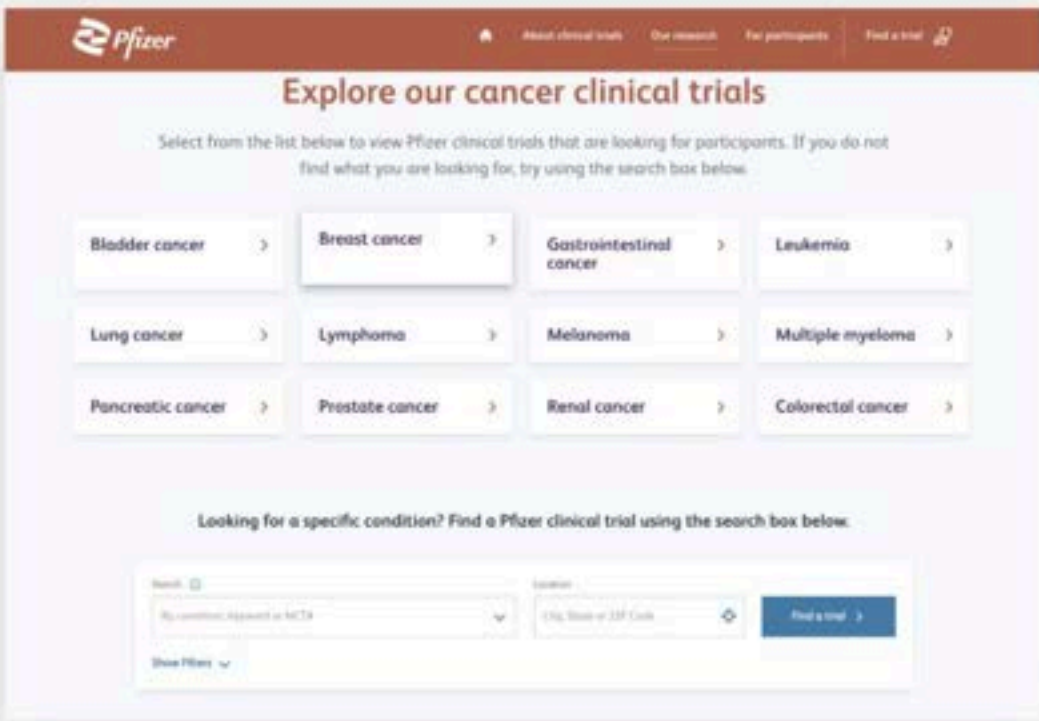
Delivery

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.
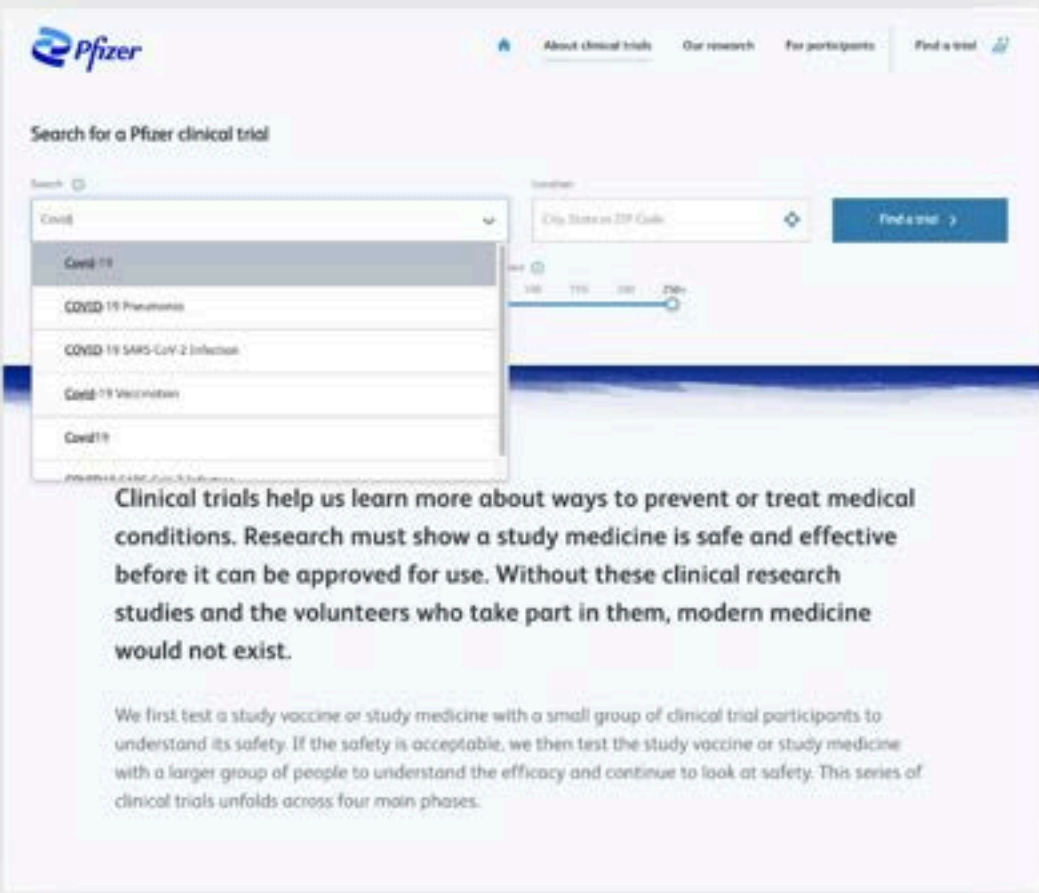
Find a Trial (Search feature) via Global Nav

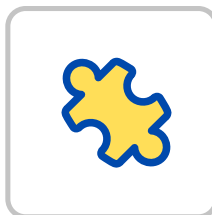Trial "Detail" Page

Other touchpoint to find a trial
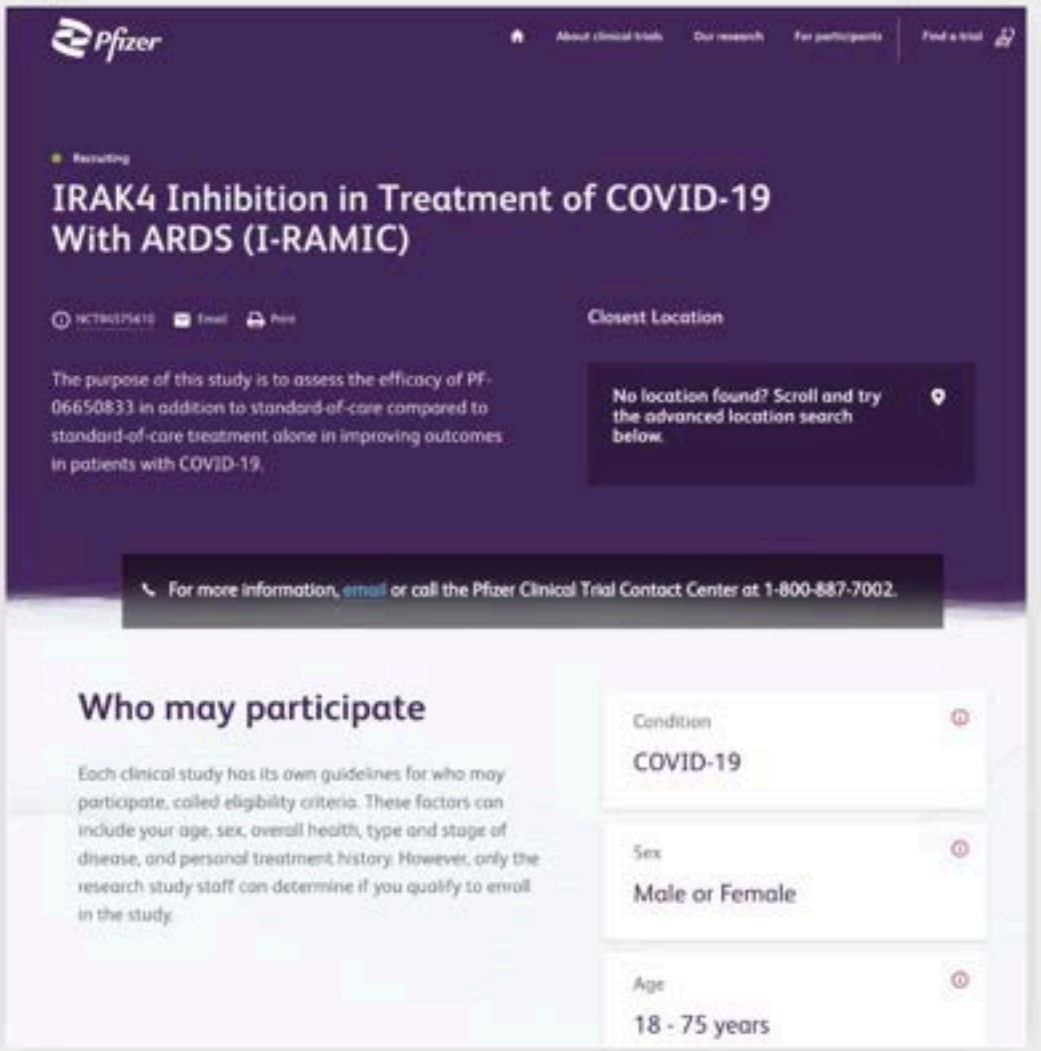
Clinical Trial Study Page

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,***
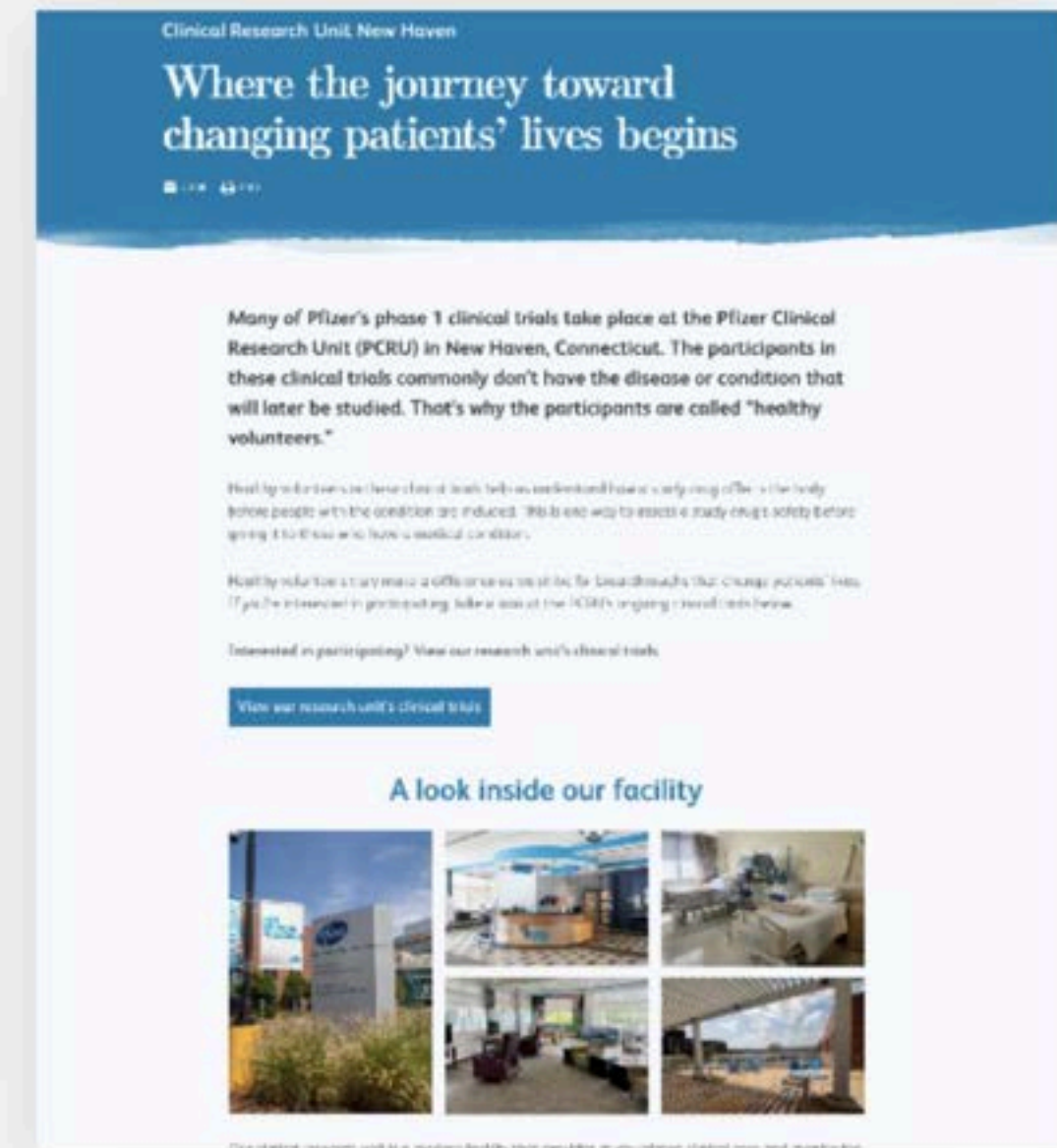
Key Challenges

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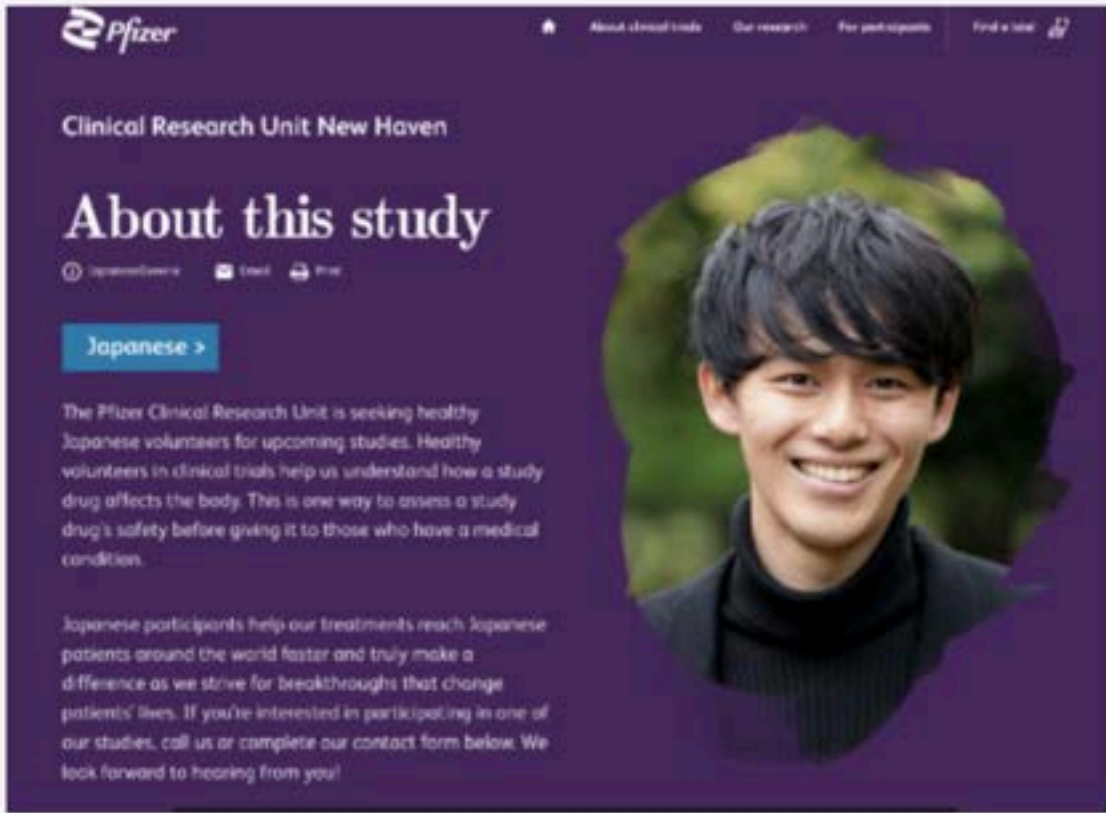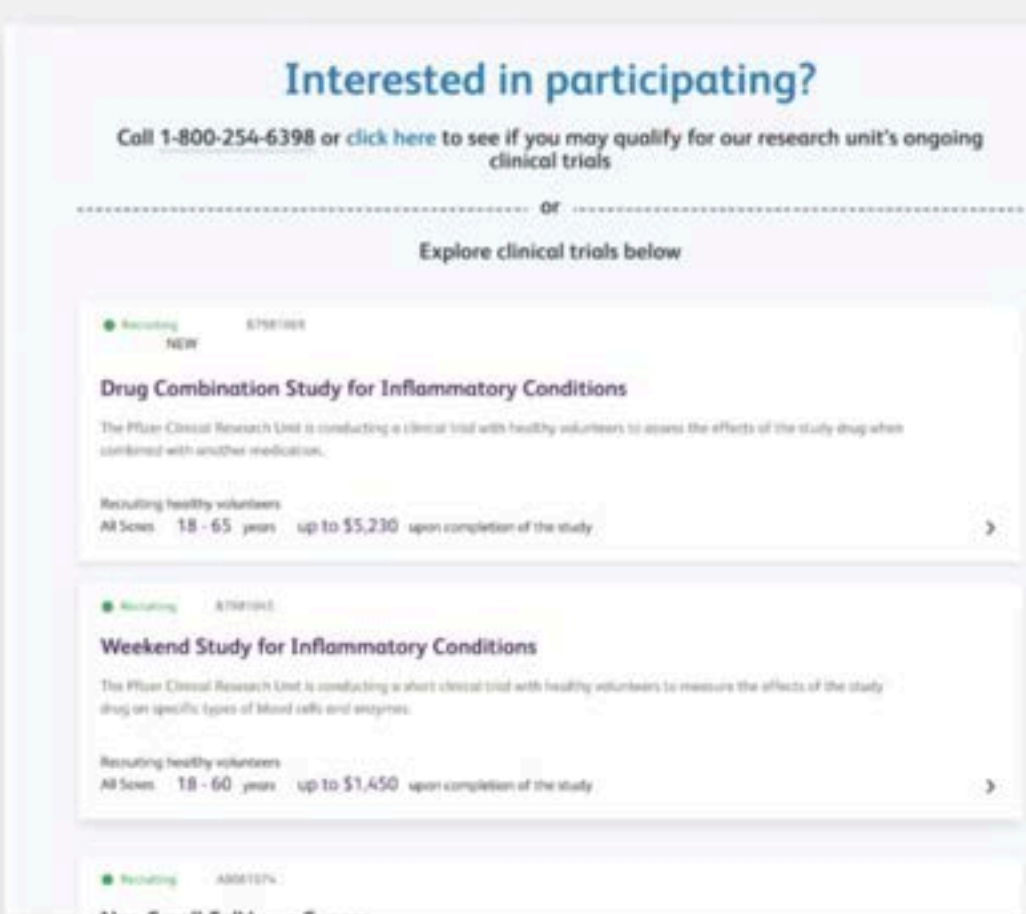
Delivery

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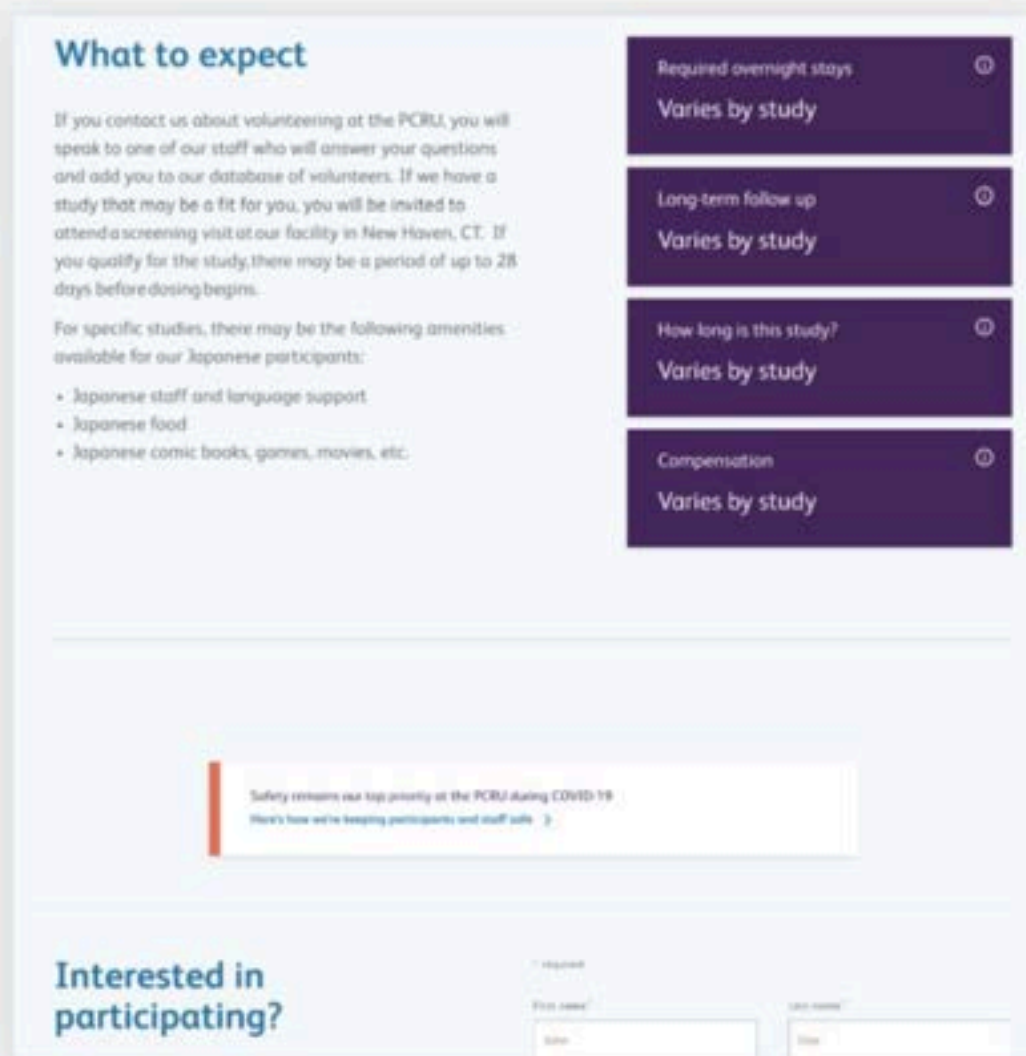

PCRU Landing Page

PCRU Trial Options

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)
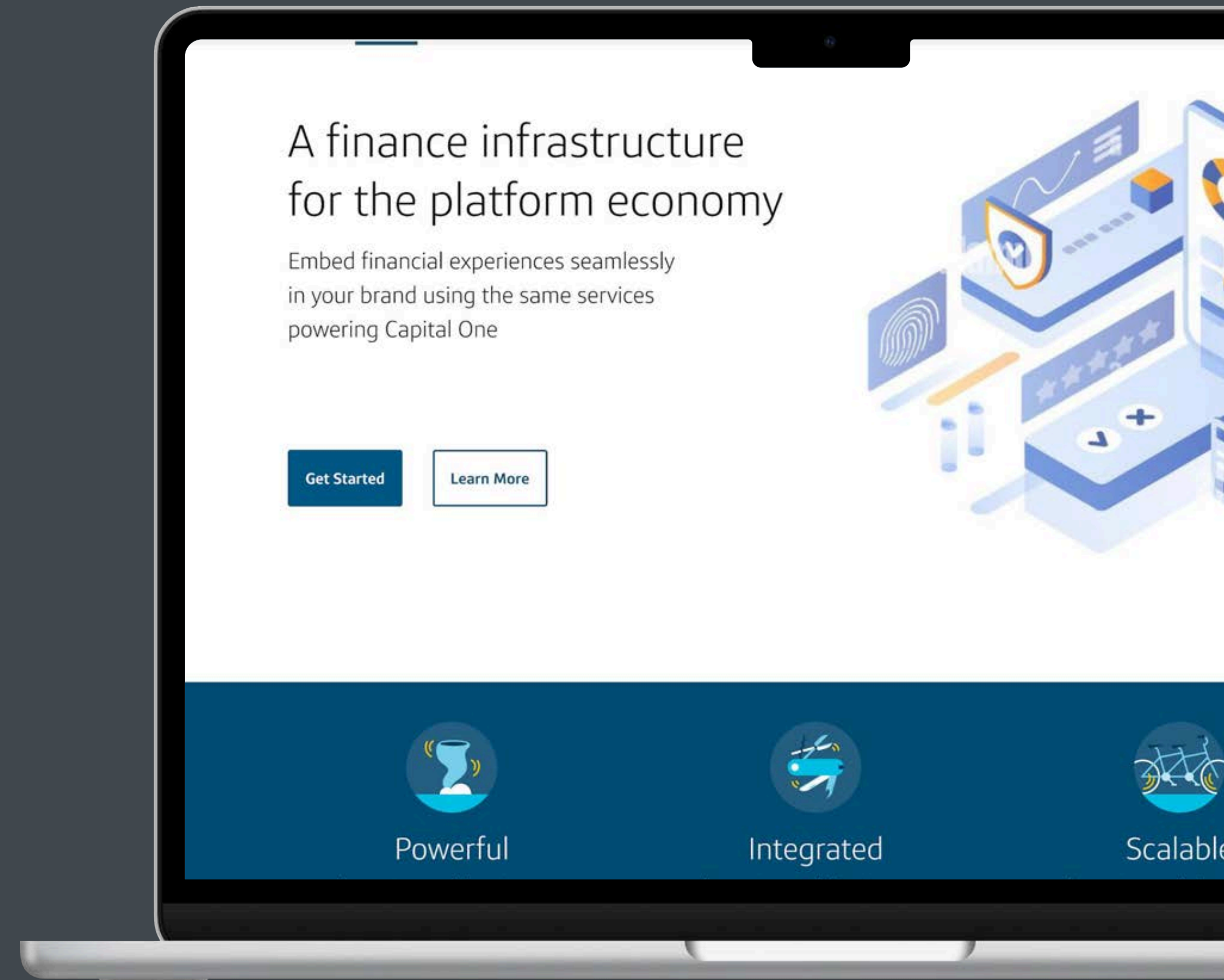
About

As part of their larger tech transformation strategy, a financial services company was creating a new business model, <u>Card-as-a-Service (CaaS)</u>, 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 Assesment

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.
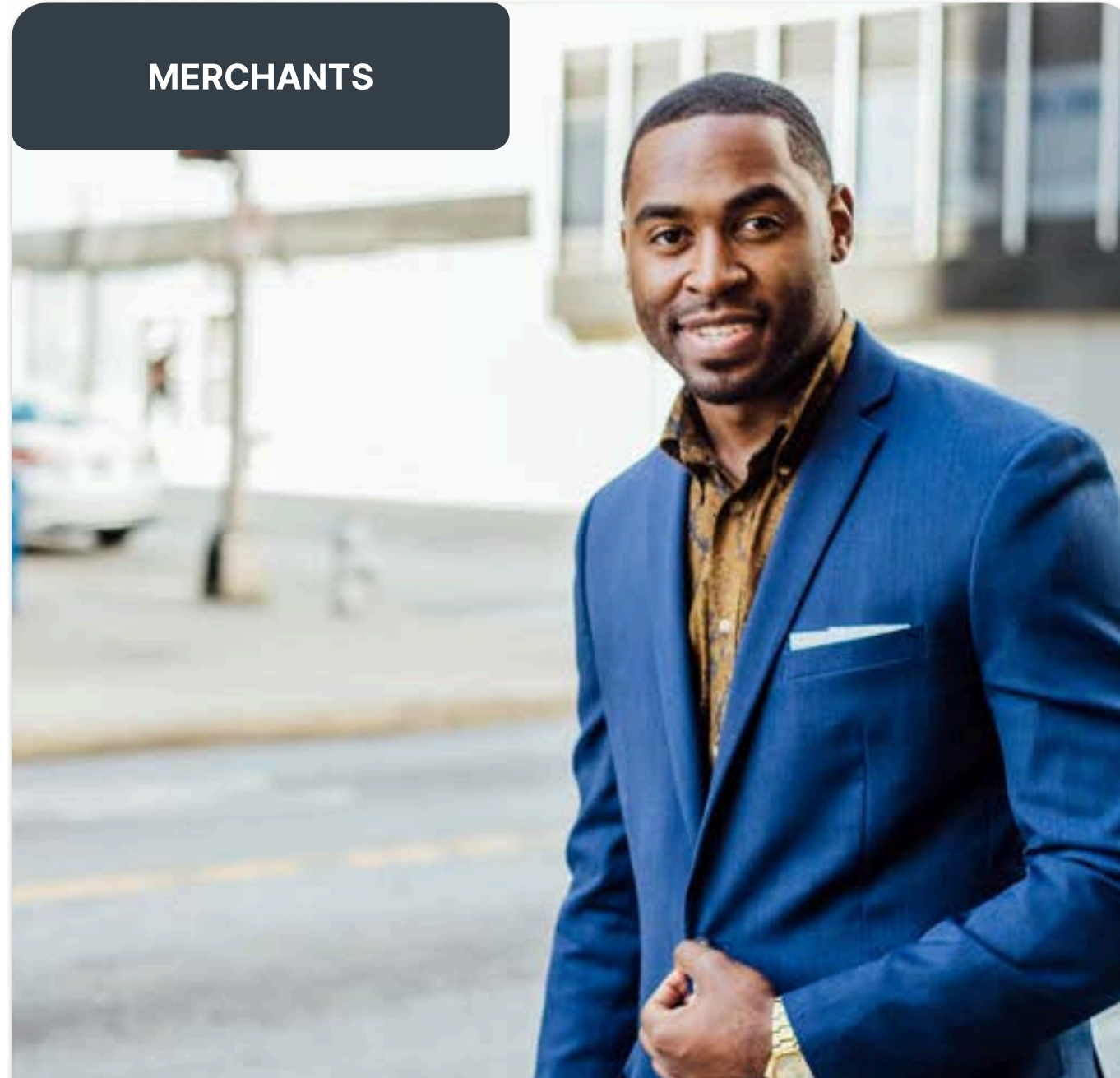
Archetypes Development

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.
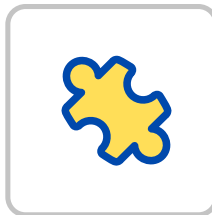

TECH EXECUTIVES / LEADS

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
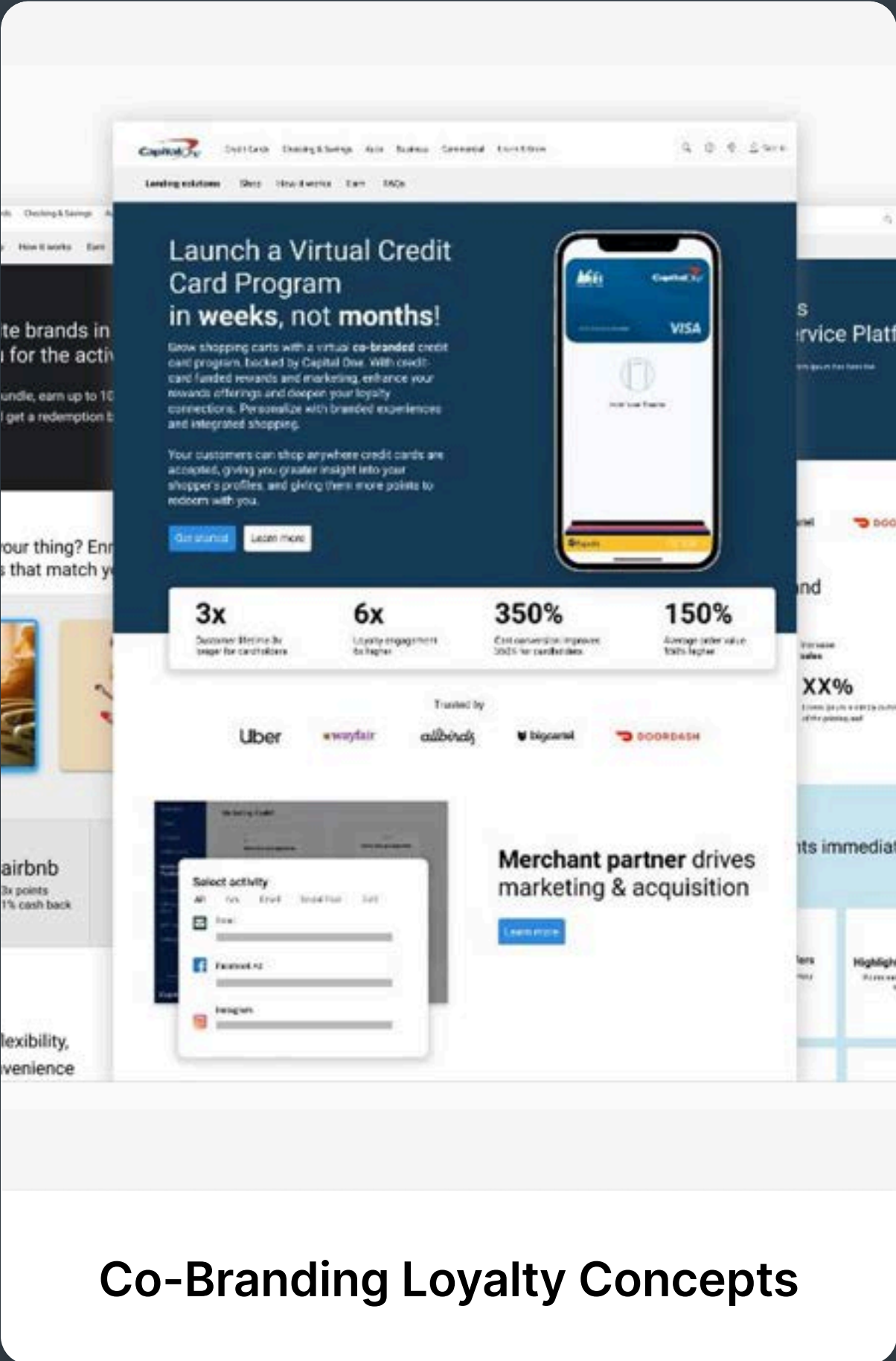
Key Activity

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
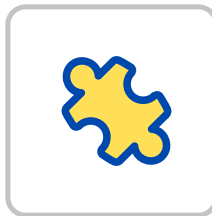
Co-Branding Loyalty Concepts

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.

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-
- Delivered a comprehensive API integration flow to clarify scope and timeline for tech partners.

Seamless API Integration

UX Process Mapping

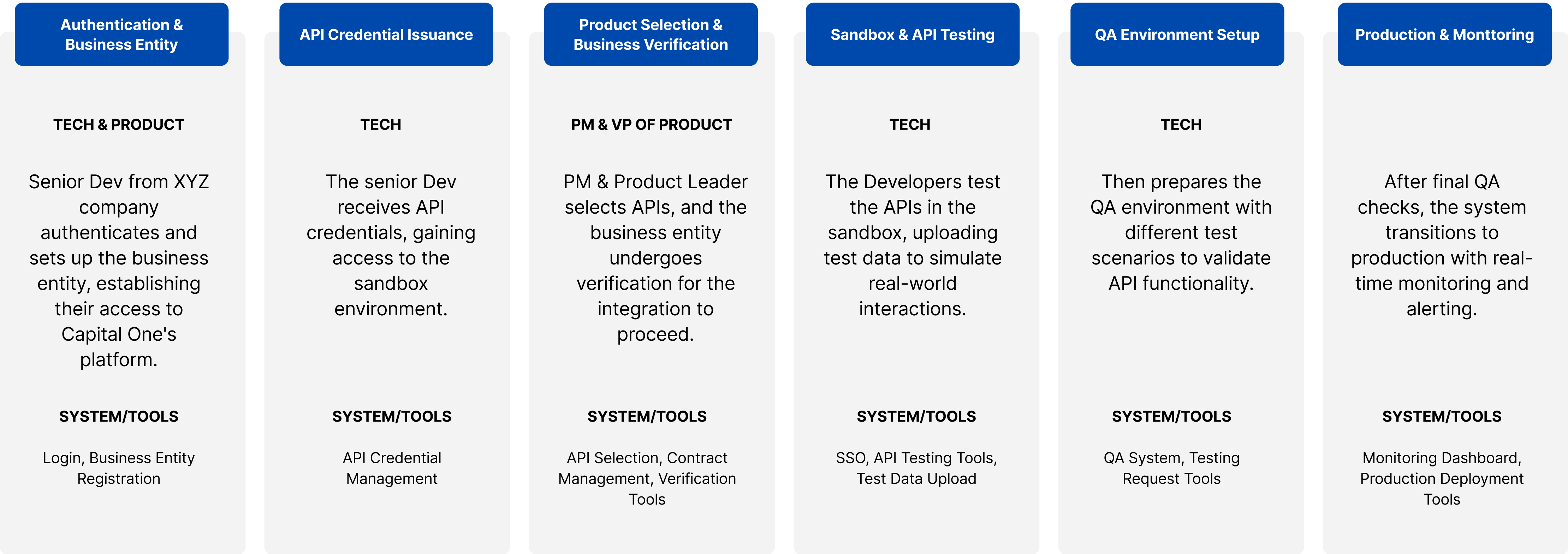**TECH LEADER**

direct interviews to helps us better understand the general expectation for pi...
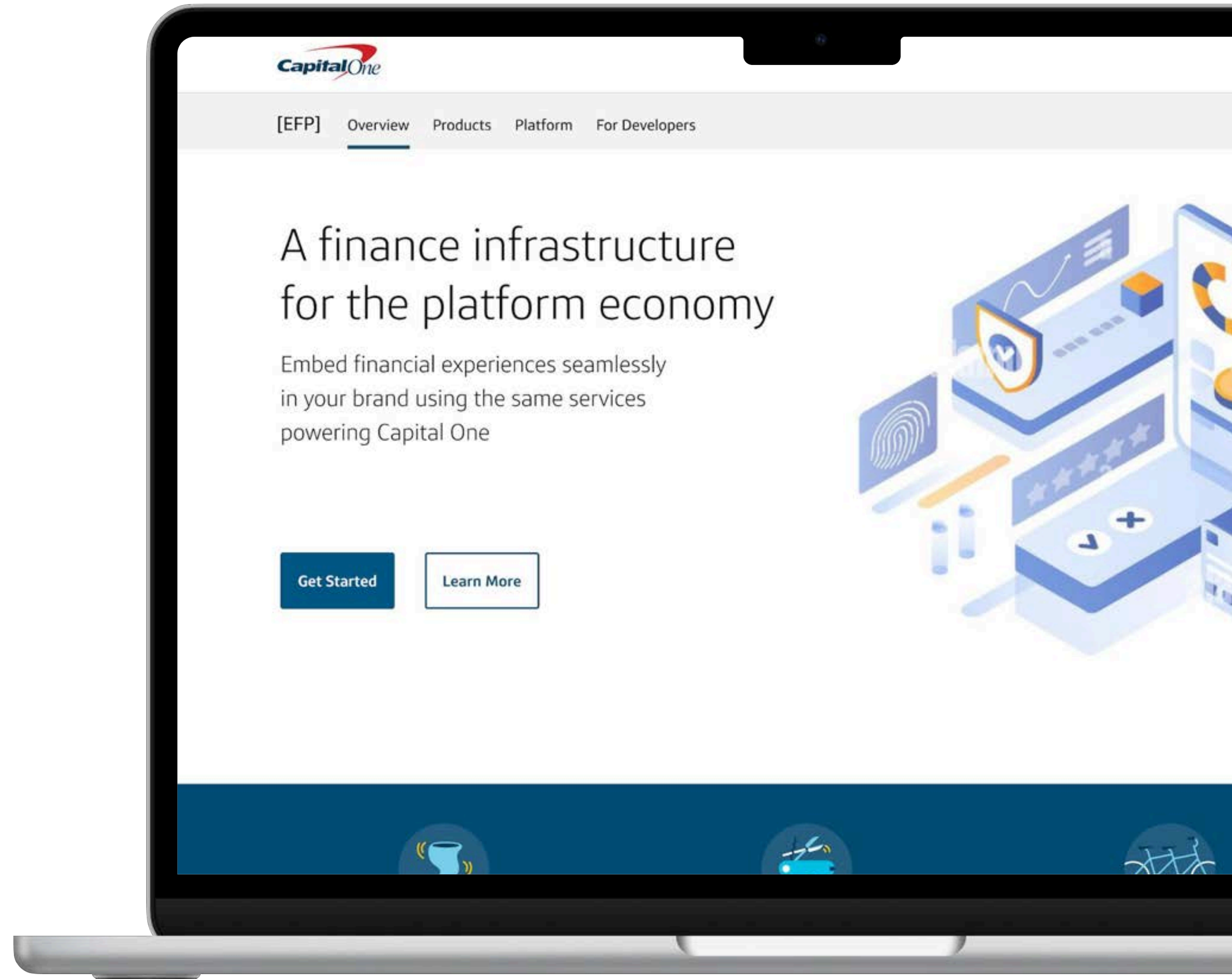
API Integration Journey with Future Prospects (High-Level)

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 & Monttoring
TECH & PRODUCT	**TECH**	**PM & VP OF PRODUCT**	**TECH**	**TECH**	**TECH**
Senior Dev from XYZ company authenticates and sets up the business entity, establishing their access to Capital One's platform.	The senior Dev receives API credentials, gaining access to the sandbox environment.	PM & Product Leader selects APIs, and the business entity undergoes verification for the integration to proceed.	The Developers test the APIs in the sandbox, uploading test data to simulate real-world interactions.	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.
SYSTEM/TOOLS	**SYSTEM/TOOLS**	**SYSTEM/TOOLS**	**SYSTEM/TOOLS**	**SYSTEM/TOOLS**	**SYSTEM/TOOLS**
Login, Business Entity Registration	API Credential Management	API Selection, Contract Management, Verification Tools	SSO, API Testing Tools, Test Data Upload	QA System, Testing Request Tools	Monitoring Dashboard, Production Deployment Tools

Interactive Prototypes

Link <u>here</u>

User Experience Process Mapping

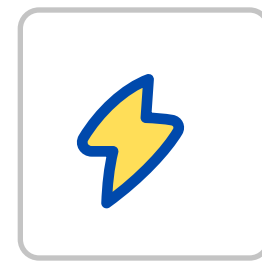Developed highly visual service blueprint to inform Scope and Functional Requirements
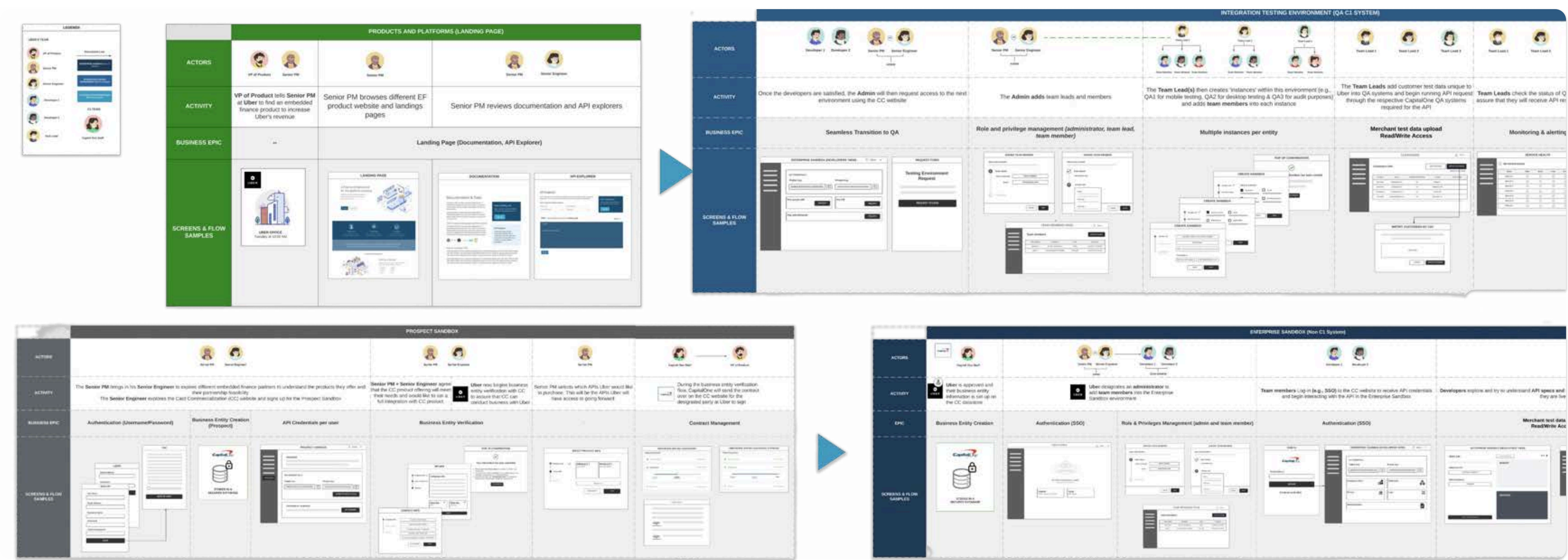
Key Outcomes

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.
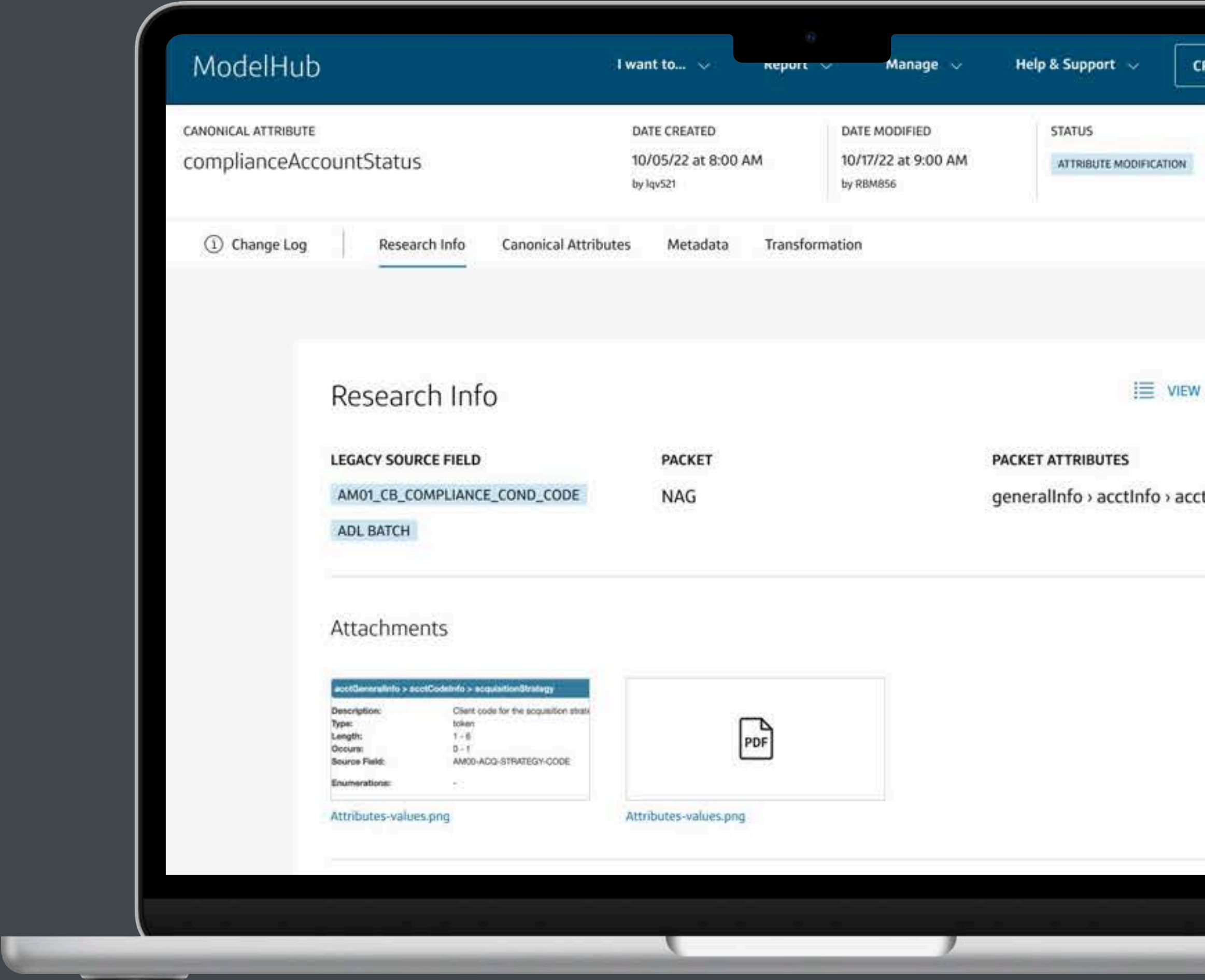
Successful End-to-End Integration

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 Assesment

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.
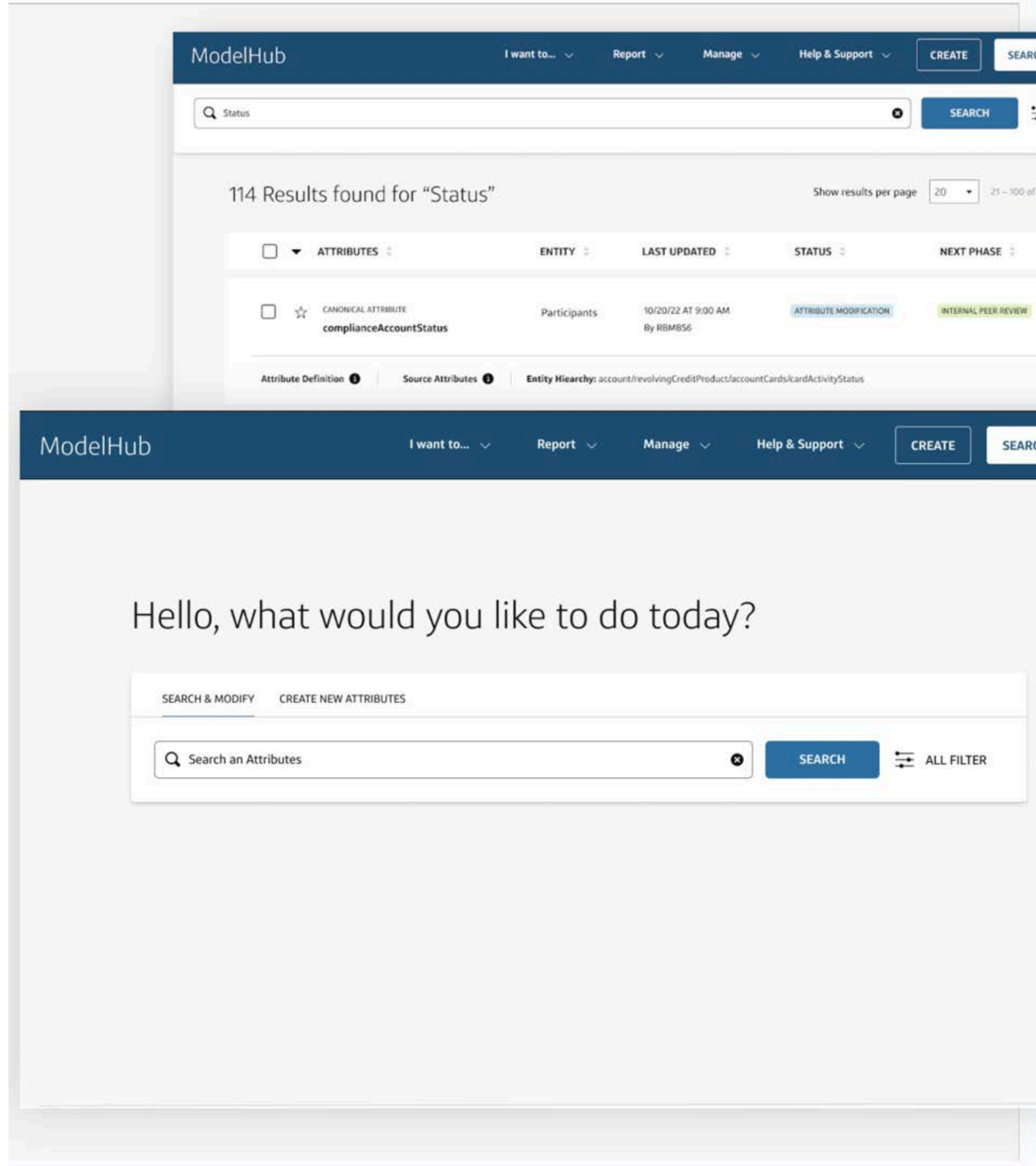
Optimizing Data Modeling Experience

Challenges

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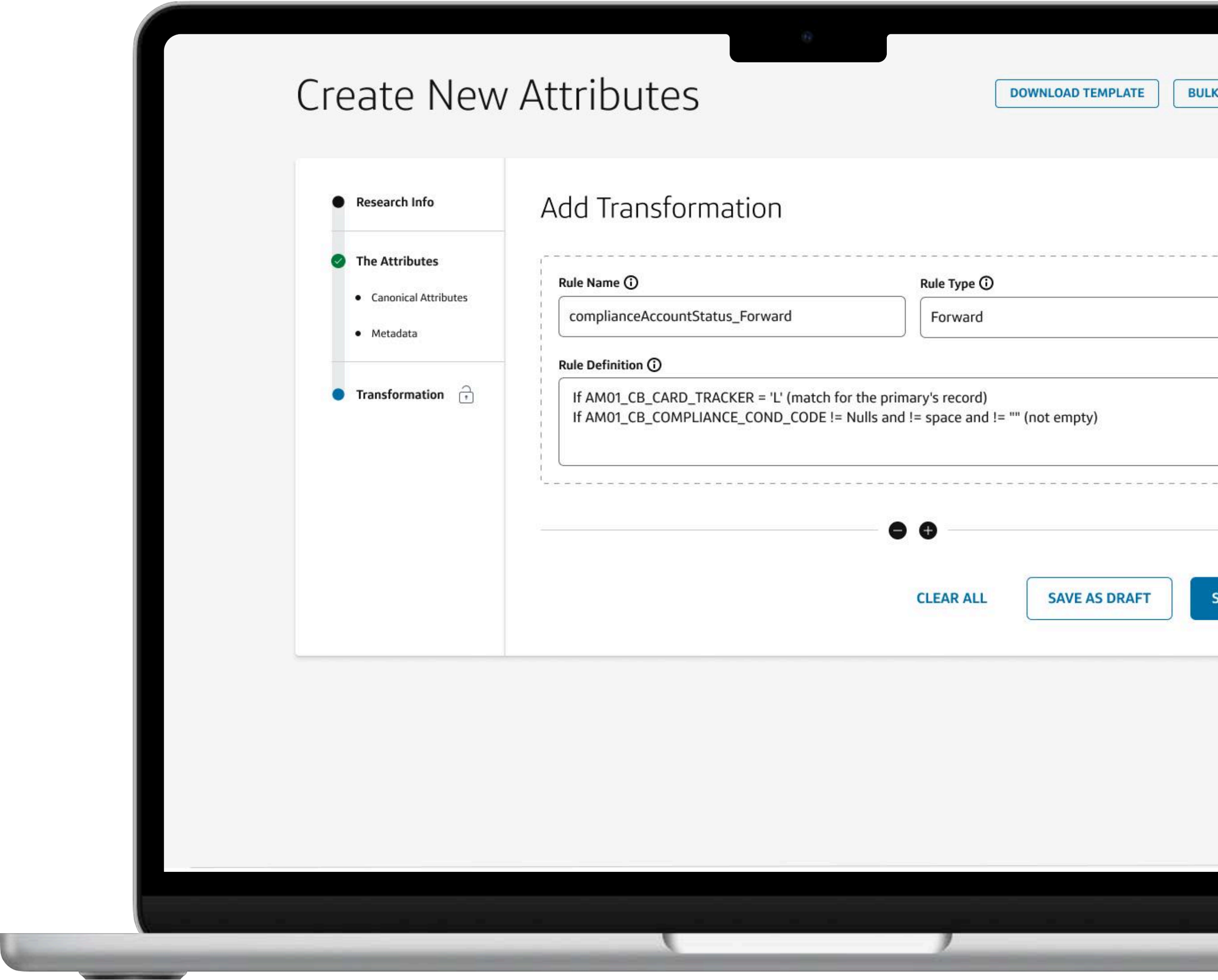- Lack of attribute saving function

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.

Interactive Prototypes

Link [here](#)

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
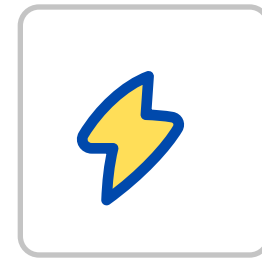
Enhanced Efficiency

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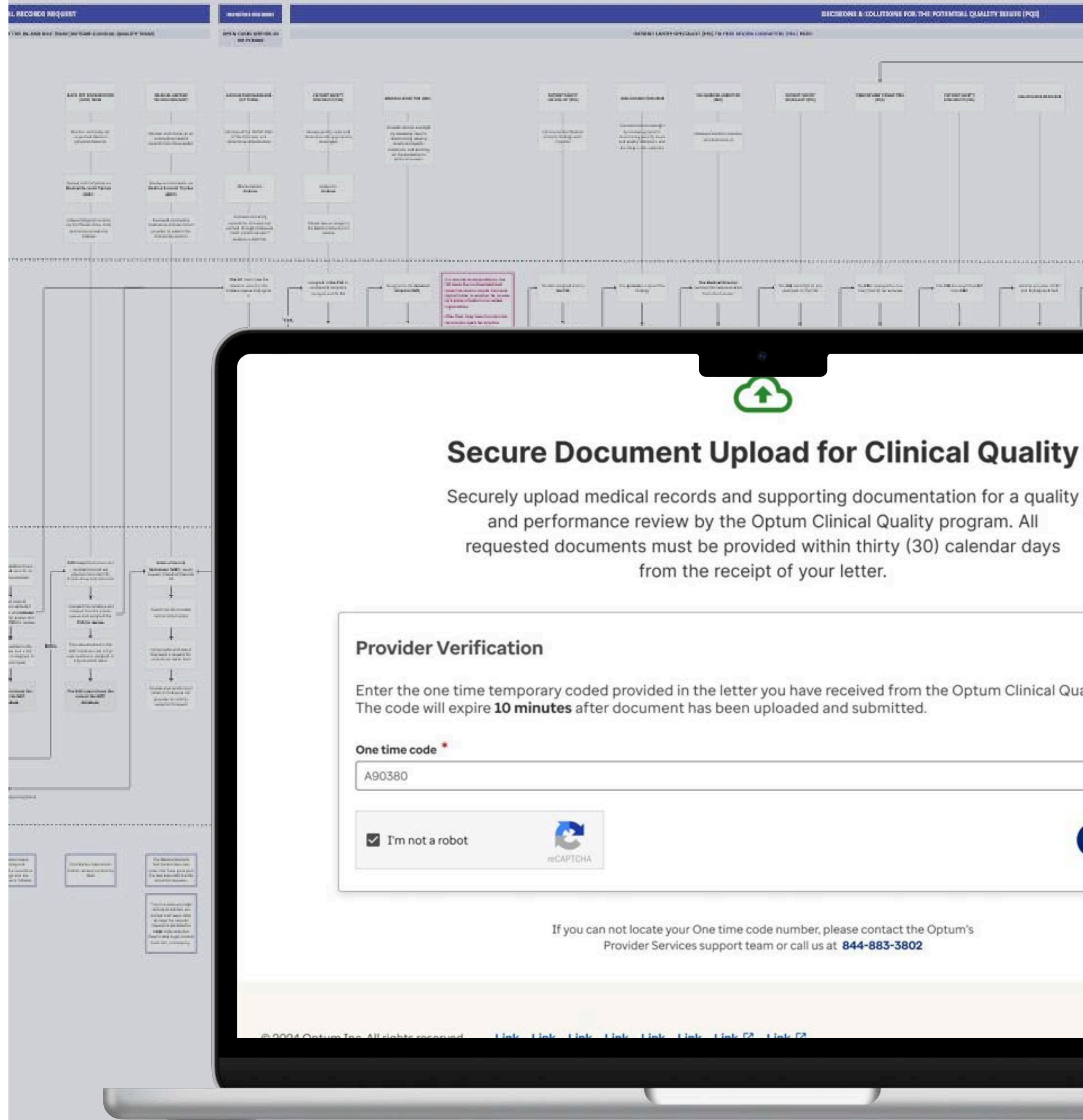
Targeted Improvements

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

Re-Design the Clinical Quality Tool

Optum

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.

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.

VACCN | TPA, **Clinical Quality Team** – Patient Safety Lead

Patient Safety Lead
Medical Surgical

Patient Safety Leads (PSLs) 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.

> *Case-in-take process are manual and time consuming, increasing the risk for mee the turn around-time set by the VA ~ Tina (PSL)*

JOBS TO BE DONE
- Generates detailed case reports.
- Manages the entire case process from intake to resolution.
- Monitors case progress for Patient Safety Specialists.
- Conducts regular compliance and quality audits.
- Provides training and mentorship for Patient Safety Specialists.
- Handles claim queries.
- Performs initial assessment of PQI refe forms.
- Manually sets up new cases in the syste
- Confirms referrals in the Med Net syste
- Communicates with the VA on PQI issu and redirects quality service events.
- Directly reports potential criminal find the provider network.

CHALLENGES
- Multiple logins across databases.
- Manual processes for cases from the VA, requiring significant time and effort.
- Need to gather and research records from various sources, which can be time-consuming.
- High pressure to meet case closure timelines.

NEEDS
- Meet organizational and contractual KPIs
- Integrated, user-friendly systems for case management.
- Efficient tools for generating and manipulating reports.
- Clear communication channels with the VA and other stakeholders.

GOALS
- Close 95% of cases within 90 days and 99% within 180 days.
- Ensure accurate and timely case resolution.
- Maintain high standards of patient safety and quality care.

DESIRED OUTCOMES
- Reduced case-in-take time spent
- Timely Report turn around

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 ar accepted, max 10MB.

REPORT UPLOAD

Upload the Report *
Accepted file types: xlsx, ≤10MB
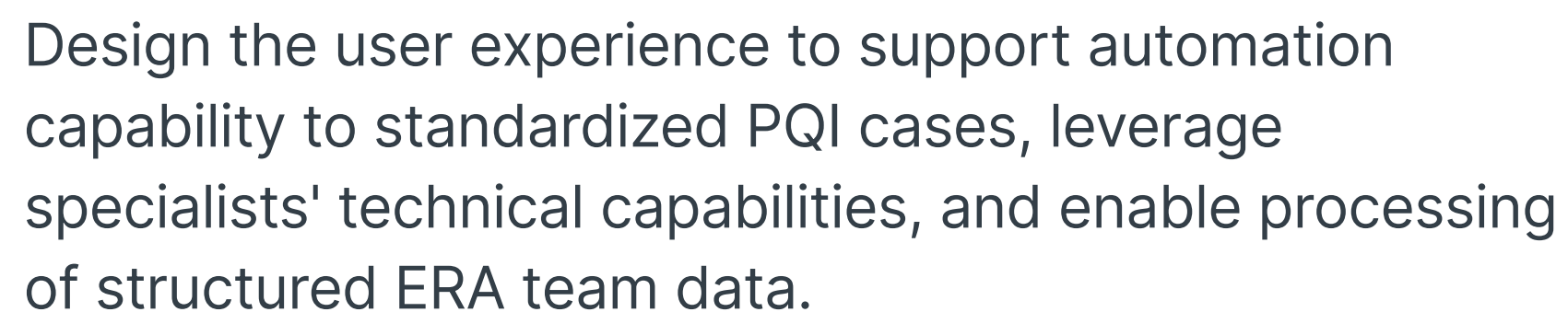
[Select file]   File status message goes here
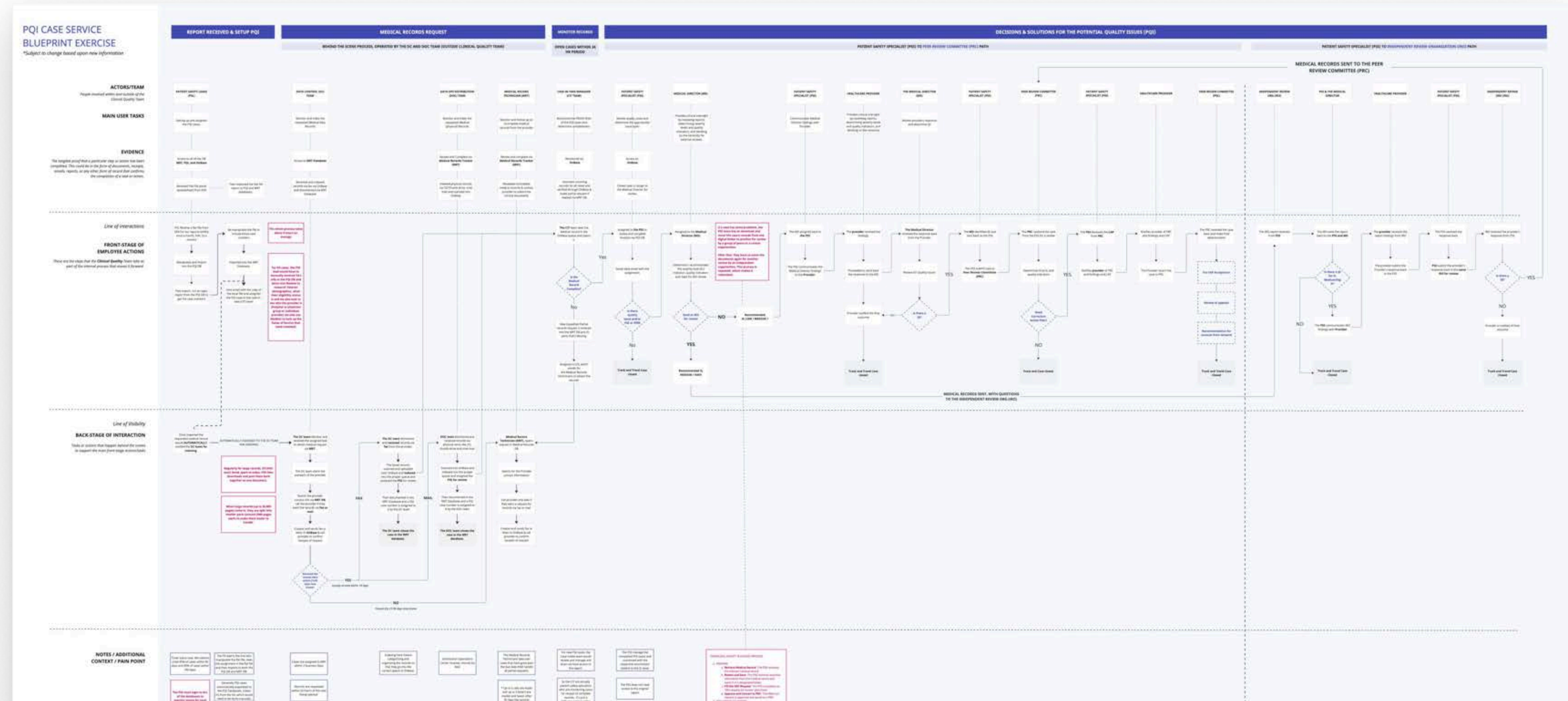
⬆
Place files on the drop area to upload

If you have issues with file upload please contact us at **xx@optum.com** or **123-456-7890**

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.

End-to-End Service Blueprint

Business Development

Public Services Walking Deck Development

About

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.

Approach & Delivery
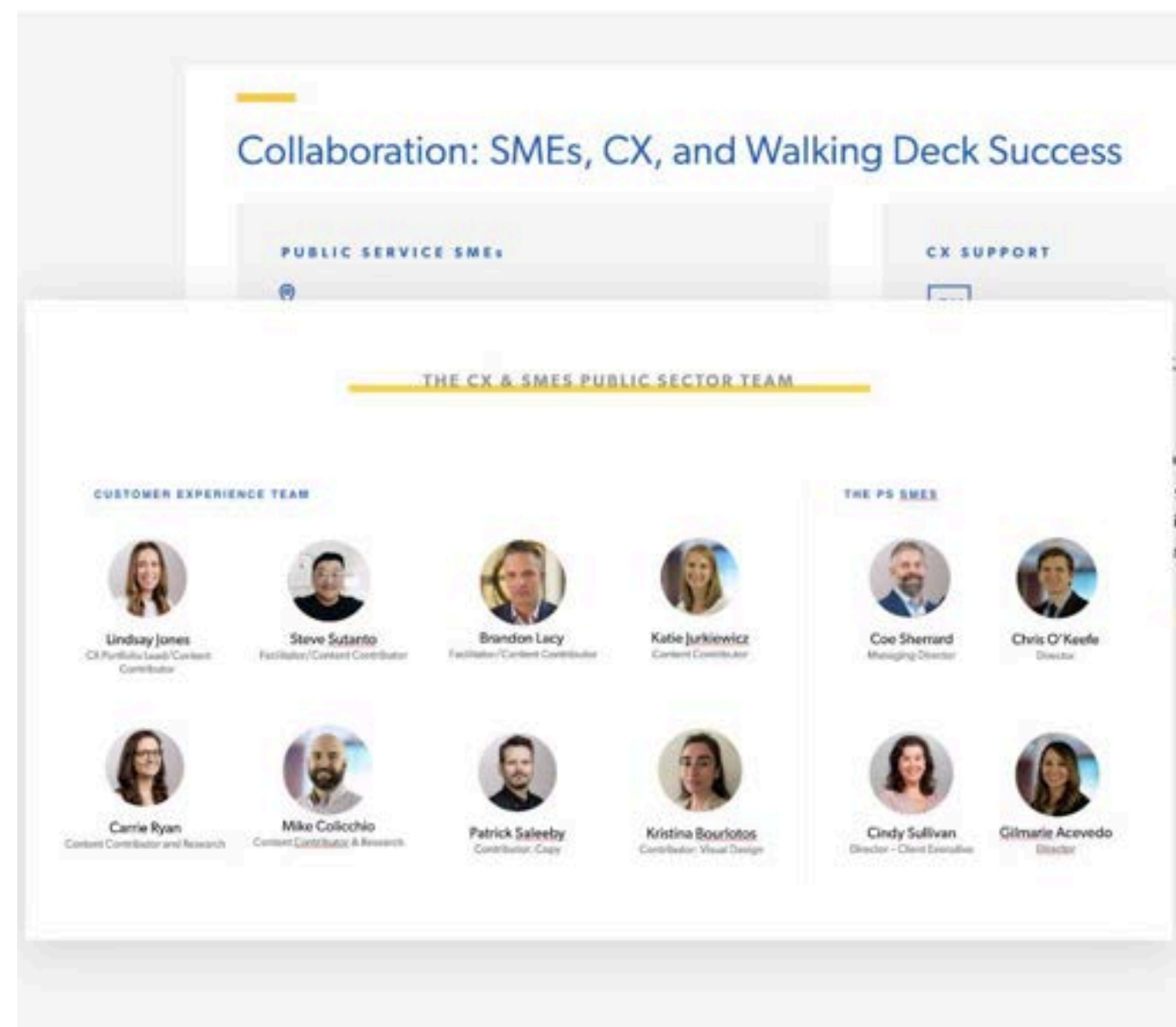
Team Formation

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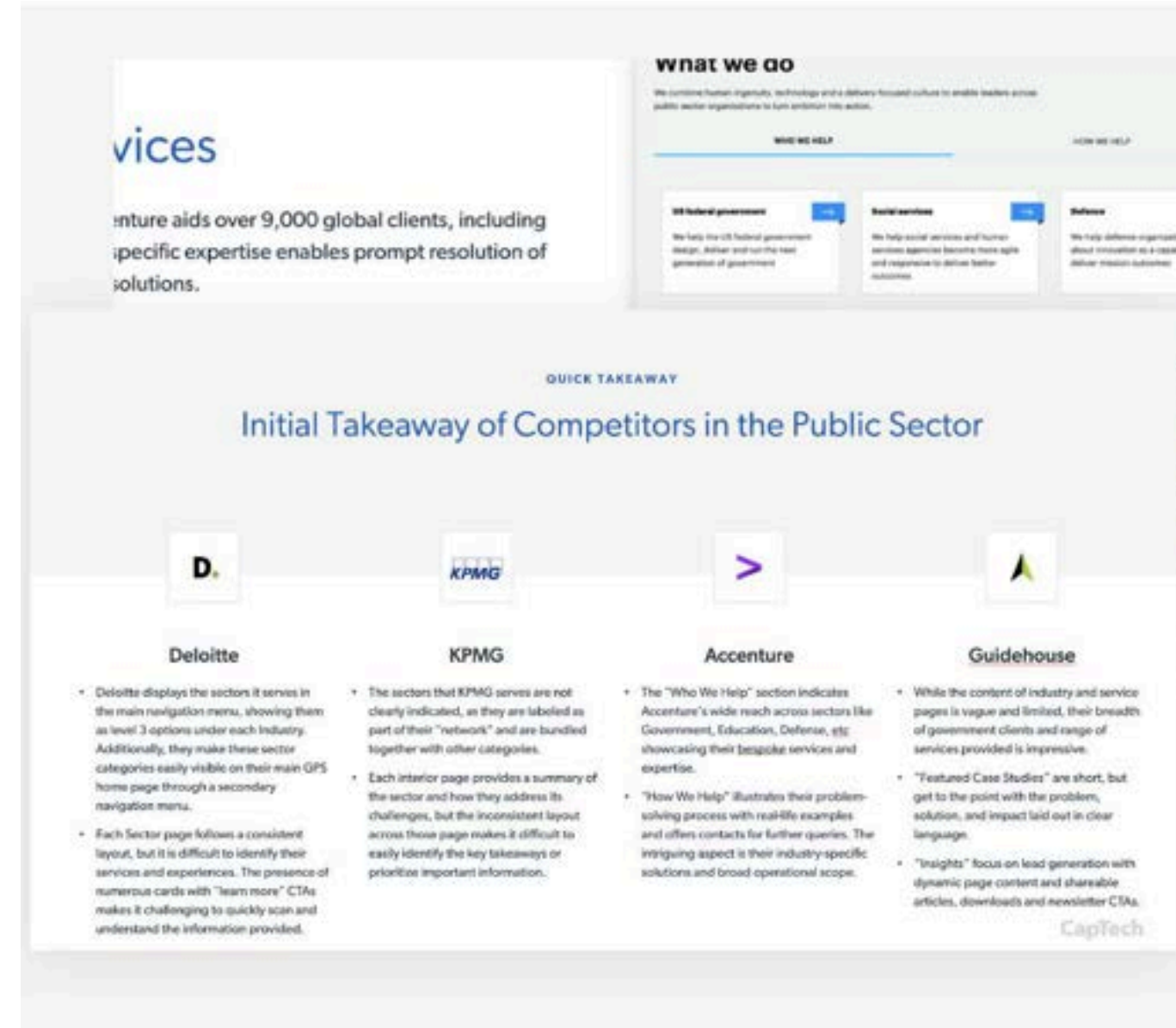
Competitive Analysis

Conducted competitive analysis of major firms to refine sales tactics and content strategies.
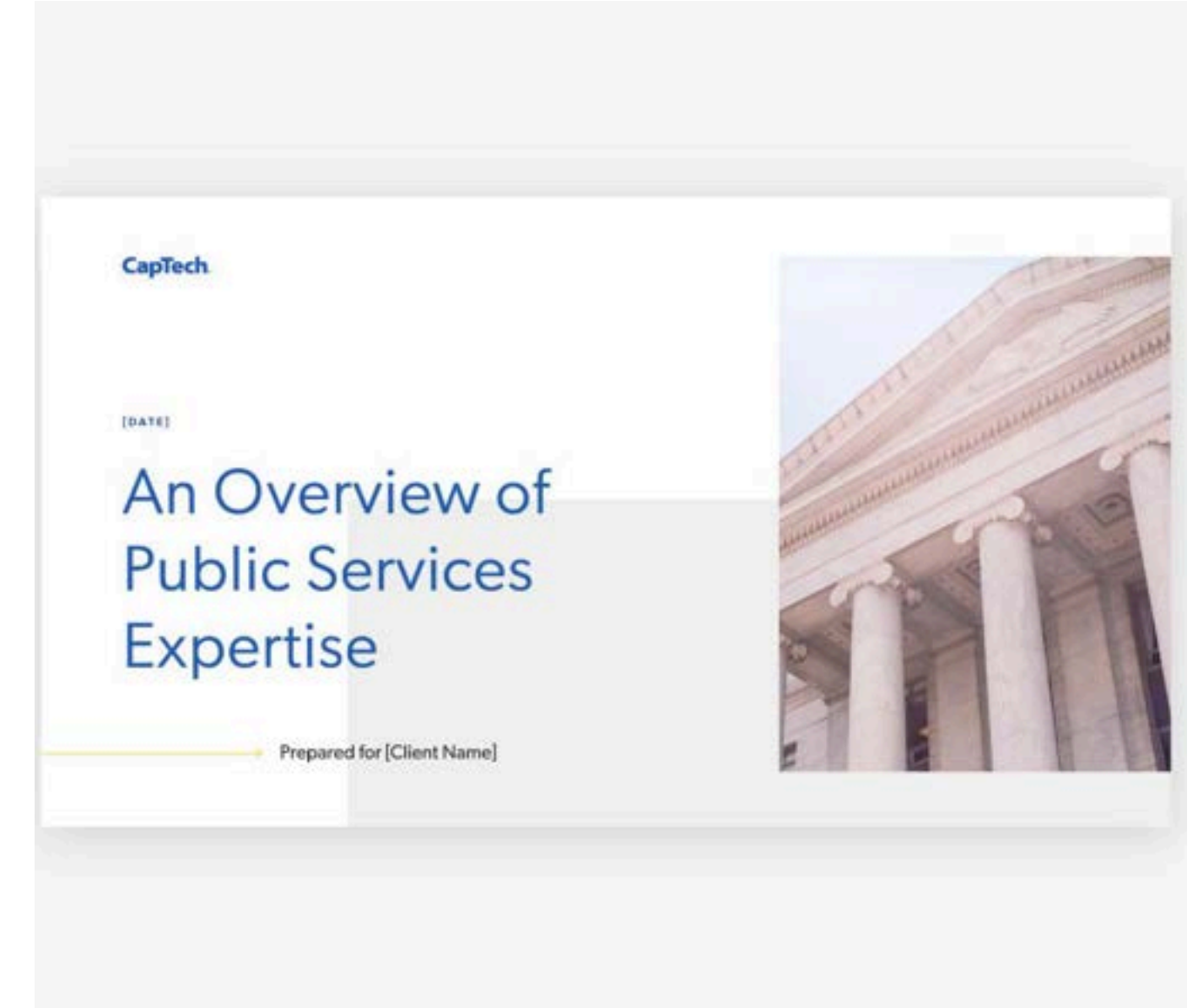
Client Presentation Enhancement:

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

Project Roadmap and Milestones

INITIATION & ALIGNMENT Connecting with the Stakeholders	**COLLABORATION** Iteration and Feedback	**REFINEMENT & FINALIZATION** Finishing touch and Final Delivery

01 Identify the SMEs

1 week

Initial communication with the portfolio leads and the SMEs.

02 Kick off meeting

1 week

Define the goals, roles expectation of the project, ensuring everyone is on the same page before.

03 Cadence

Weekly

Organizing regular check-ins ensures to ensure we stay on track, and it sets a rhythm for updates and feedback loops.

04 Build

3 Weeks

Drafting and revising the content with input from SMEs ensures the walking deck is aligned with the envisioned goals and expert insights.

05 Copy/Design

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.

06 Pilot

--

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.

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

Enggage users & Drive Actions

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 building strategic relationship with clients.

Compelling Content Story

a Clear Value Proposition & Industry Expertise

Fostered Stronger Relationships with the portfolio team

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.
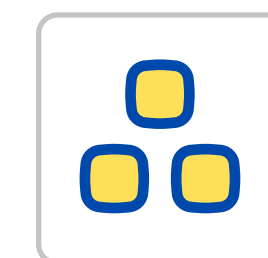
Strategic Collaborator

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

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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

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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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