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TOOLBOX

Strategy + Roadmapping + Executive Presence + Building Processes + Leadership + Startup Savvy + Team Management + UX Methodologies + Workshop Facilitation + UI Visual Design + Wireframes + Prototyping + Design Research + Service Design International Experience + Usability Testing + User/Client Evangelist + Affinity Mapping + Contextual Interviews + Ecosystem Mapping + User Personas + Information Architecture + Customer Journey + Mobile/Tablet/Desk + Agile Scrum

EXPERIENCE

CHARLES SCHWAB
Financial Services
UX Director
Denver, Colorado
2018-2024

Financial Services company, offering trading and investing opportunities for a breadth of needs. I lead a team of 17 UX Managers and Designers within an org of over 200 UXers. I implement and mature the design thinking within the institution to produce strategy, leadership and top-tier execution for digital offerings.

- **Manage a team of ~20** -- 2 levels: team managers and individual contributors. I lead UX on 5 programs across Schwab Digital that includes 23 cross-discipline UXers (Research, Content, Design).
- **Executed on high visibility, high stakes initiatives - Schwab Investing Themes** - Launch of acquisition Motif -> Schwab Investing themes, Schwab Personalized Indexing. Built new Schwab Experience for our DIY market segment to drive value and personalization through themed investing. To launch Sept 2023 w \$1.3B expected NNA. Includes new exploratory trade experience, implementing, updating Design System, Product Marketing, new capabilities and complexities of launch date requirements.
Also similar: Schwab Intelligent Portfolio Premium. launch 2019 (Robo Investing w Advisor, subscription pricing), Digital Financial Planning & GUIDE experiences, launch 2020.
- **Incremental Design delivery - Schwab Charitable: giving \$5B to charities in 2023** - Team worked in empowered teams to develop hypotheses to business objectives and guided donor experience initiatives. Used data and client backed rationale for journey, content, E2E experience and planned UX Research. Includes grant automation (5% reduction to calls, CES 98, increase recurring grants 2%), led introduction and conversion to design system to decrease MLO effort, decrease grant duplication (decrease 2% manual cost), recurring grant (increase 20% since last year/pre-design), Update to Charity Search to increase confidence in Charity selection, built customer journey, data integration and utility integration for new Charitable Open Account flow, vision work for updated Account Overview based on client value and JTBD framework.
- **UX Catalyst - Design Strategy arm of Innovation Ecosystem** - Led UX Catalyst team and product strategy.
Delivered 100 engagements in 3 years, 31% on Product Roadmaps, 36 Workshops facilitated, 16 Business Cases supported, 22% in Production, 28% in pipeline for next best actions for teams.
Provided space to uplevel and upskill 70+UXers and other practitioners on Design Thinking, problem solving and Storytelling. Joint shares to EVP level to align on company innovation priorities & direction with Labs, RnD, Data/Insights in IA Ecosystem.
- **Transformed 2 business teams to Digital mindset** - Workplace Financial Solutions (1.9M Participants & \$249B AUM) & Equity Awards (564K Participants & \$94B AUM). Products we deliver experiences for: 401k Participant Journey, Equity Awards Retail Account experience, Plan Admin software, Sales Demo software, Backend Recordkeeping. Introduced Transformed Ways of Working with UX and Development Delivery, Discovery Ceremonies, Roadmap strategies, UX Bootcamp, Dual Track Agile and solid partner relationships with Product, Offer, Marketing, Development (up to SVP level). Product delivery: launched new Financial Wellness initiative to increase literacy and confidence, launched client facing 401k website overhaul to focus on JTBD, Needs and values of users and Client Promoter Score. Rollover initiative (increase 28% CTR), increased UX Resource # from 1 to 7 in 2 years because of value and over exceeded expectations of UX delivery.
- **Establish and enhance UX processes, standards, roadmaps, and development integration across product offerings.**
This increased efficiency of teams by lowering # meetings, creating trust with Development and Product partners and lowered Sprint overflow by 90%. UX Bootcamp to share outwards UX methods, ways of working and best practices created functional, replicable processes administered by all 5 programs to speed up discovery and delivery, increase collaboration and decrease friction and frustration.

TRANSAMERICA
Financial Services
Digital Design Manager
Denver, Colorado
2017-2018

104 year old financial institution, 11,000 employees nation-wide. Serves over 6 million customers and grossing over \$472 billion, the company is transforming to deliver customer focused digital products to keep up with the needs of the everyday user.

- Built and maintained a multi-disciplinary team from just 5 designers to over 21 in 6 months; Allocated resourcing for 6+ products company-wide split between UX, UI and UX Researchers
- Re-designed and launched Transamerica.com. Methodologies included: Information Architecture to shave off 3/4 legacy pages, Card Sorting to build navigation to prospect's mental model. Re-design visual interface to showcase re-brand.
- Managed teams and work that supported empowered pod teams for Plan Sponsor software, TA.com website redesign, Advisor Services facing software, 401k Participant App and Website redesign.
- Shaped vision and strategy for design and product teams ranging from the Transamerica mobile app to retirement participant web app dashboard experiences to design systems for the entire digital experience.
- Effectively managed complex product teams and SME (CMO, VP Marketing, VP Product) to pinpoint obstacles, use design and communication to deliver products that deliver high-value from C-level execs to our everyday customers.

N26

FinTech Startup
 UX Product Design Lead
 Berlin, Germany
 2016-2017

German bank servicing 17 European countries with over 350,000 customers, built to disrupt the banking industry. Mobile-first hub for all banking needs.

- Mentor and manager of 10 person design team. Directed designers day to day, design member 1:1s and taught team/company workshops to learn UX/Design best practices.
- Strategic design thinking for roadmap products, optimized MVP to launch, identified and captured customer desired features and directed supporting user flows and wires.
- Established and strengthened the UX team by initiating research and testing for the company, creating an in-house process workflow, User Testing Lab, and teaching UX Research methodology to Jr Designers.
- Managed multiple cross-functional feature teams that spearheaded new products (Credit, Savings, Insurance, Internationalization). Initiated 3 channels of revenue and enhanced access to features fulfilling customers needs.
- Conceived and directed the migration ecosystem including user flow moving over 170,000 customers to new licensed bank. Built, tested and implemented – transferring an unprecedented 96.1% of customers.

CONSULTING

Strategic Design + Startups
 Senior UX/UI Designer
 SF, Boulder, SE Asia, Bahrain
 2014-2016

Experience and design projects for agencies and startups translating business and user requirements into clear, tangible and business-aligned concepts and products.

- Strategized and built customer experience for Punchcut agency/Disney for new movie watching experience that would excite users, carving out niche in crowded market.
- Responsible for leading UX/Visual design for Social Credits, a World Economic Forum initiative in Bahrain. Heuristic audit, strategy, concept, wires and branding for visual UI of website. Organization and implementation for G-20 summit presentation.
- Developed vision for refreshed visual brand and refined UX/UI product design for Kindara, a Boulder startup focused on women's fertility awareness. Guided the product to build on the archetypal user creating a more intuitive and visually stimulating product for their users.

QUEST ALLIANCE

Education Innovation NGO
 Design Manager
 Bangalore, India
 2014

Indian owned & run NGO in Bangalore, India that enables children and young adult self learning with funding from USAID and IYF Boston.

- Crafted unified vision for design team: building out a roadmap for products and processes with most impactful return. Directed design team, instilling Human-Centered Design methodology throughout the company's practices: including cross-team collaboration and design learning workshops.
- Orchestrated project teams in India through fieldwork, analysis, synthesis and product creation of ongoing projects focused on dropout prevention, youth employment and youth entrepreneurship.
- Worked with project owners and designers in close collaboration to iteratively problem solving with design thinking. Created solid actionable solutions, realized product strategy plans and identified actionable research insights.

FROG DESIGN

Global Innovation Design Firm
 Senior Visual Designer
 San Francisco, CA
 2009 (contract) + 2011-2014

World-wide design experience consultancy, focused on product realization, business growth strategy and innovative, customer centric product design. 600 Employees, 11 locations, 7 countries \$30 million revenue.

- Project themes ranged from business/product placement strategy, design research and opportunity segmentation, user experience and web/application product solutions, visual design concepting and brand building, corporate presentations for executive buy-in.
- Clients include of Intel, Google, AT&T, UCLA Innovation Lab, GE, HP, The Genome Project, Alcatel Lucent, Disney, JP Morgan Chase, Nike Girl Project, Opower, Telstra (Aus telecom), Advent Financial Software, Verizon, Yellow Pages & Chevron.
- Collaborated with developers, strategists, engineers and industrial designers to: rethink patient experiences in hospitals, develop wearable device product strategies, UX design/UI build out banking applications and create innovative telecom cross device systems.
- Directed visual design vision, spearheaded UI and UX concepts, presented to execs & C-level, facilitated company workshops and built rock solid client relationships.

FLUID, INC.

San Francisco, CA
 2011

E-commerce agency building out digital shopping experiences for top name brands.

- Conceptualized online strategies, devised social and e-commerce solutions and created the core branded values look for the 2011 UGG Australia website and the newest Amazon acquisition, Quidsi web-commerce site, Wag.com.

17FEET

San Francisco, CA
 2007-2009

Boutique design agency, focused on web and micro-site marketing, bought by Google in 2013.

- Worked with clients such as Microsoft, Clif Bar, Sprint, Plum Organics, Cox. Provided research, competitive analysis, stakeholder interviews and iterative design to create on-target products to drive customer engagement, optimize conversion and ensure brand stickiness. Envisioned 17FEET branding and collateral, which was published in AIGA 365 and exhibited in their nationwide show.

EVB

San Francisco, CA
 2005 -2007

Pioneering digital marketing focused on Millennials, with over \$8 million in revenue.

- Supported concept creation, visual/motion design and programming for major accounts such as Adidas, Kashi, Wrigleys and Best Buy.

PUBLICIS/MODEM MEDIA

San Francisco, CA
 2005

3rd largest international marketing and communications digital agency worldwide.

- Leveraged client design language to create compelling emails/marketing/visuals to stay on-brand and customer-targeted.
- Client roster included: Comcast, Charles Schwab & Sprint

EDUCATION

ACUMEN+ Human-Centered Design Course
Cont. Education, 2013-2017 Prototyping Designs Course
Adaptive Leadership Course

CHICAGO BOOTH SCHOOL OF BUS. Funding An Entrepreneurship Course
Cont. Education, 2015

N.C. STATE COLLEGE OF DESIGN Bachelor of Graphic Design + Minor Art & Design
Raleigh, NC 2004 Scuola Lorenzo De Medici Semester abroad, Florence Italy

SOFTWARE

Microsoft Products + Adobe Products + Figma + Sketch + InVision + MURAL + Atlassian Products

ACHIEVEMENTS

Speaker at Experience Conference in Bratislava, Slovakia (2017); Speaker at UX Pivotal Labs in Berlin, Germany (2017); Mentor for Lady Problems Hackathon in Berlin, Germany (2017), Design Impact Fellow, India (2014); Microsoft Young Indian Entrepreneurship Competition Advisor (2014); Socap Conference Article in Frog Mag, SF (2014); Facilitation at Compost Modern Conference, SF (2013); Digital Design Guest Lecturer at San Francisco State University (2012-2014); Published in AIGA 365 book (2009); PRINT Regional Design Annual (2008); The Spanish Quarter - Horizon Interactive Award (2008); Winner FWA Site of the Day (2008); Wrigley's CoolBreathPower.com - International Advertising Award (2007); National Outdoor Leadership School: Wind River Range, WY (2000)