# CARLA SARLI
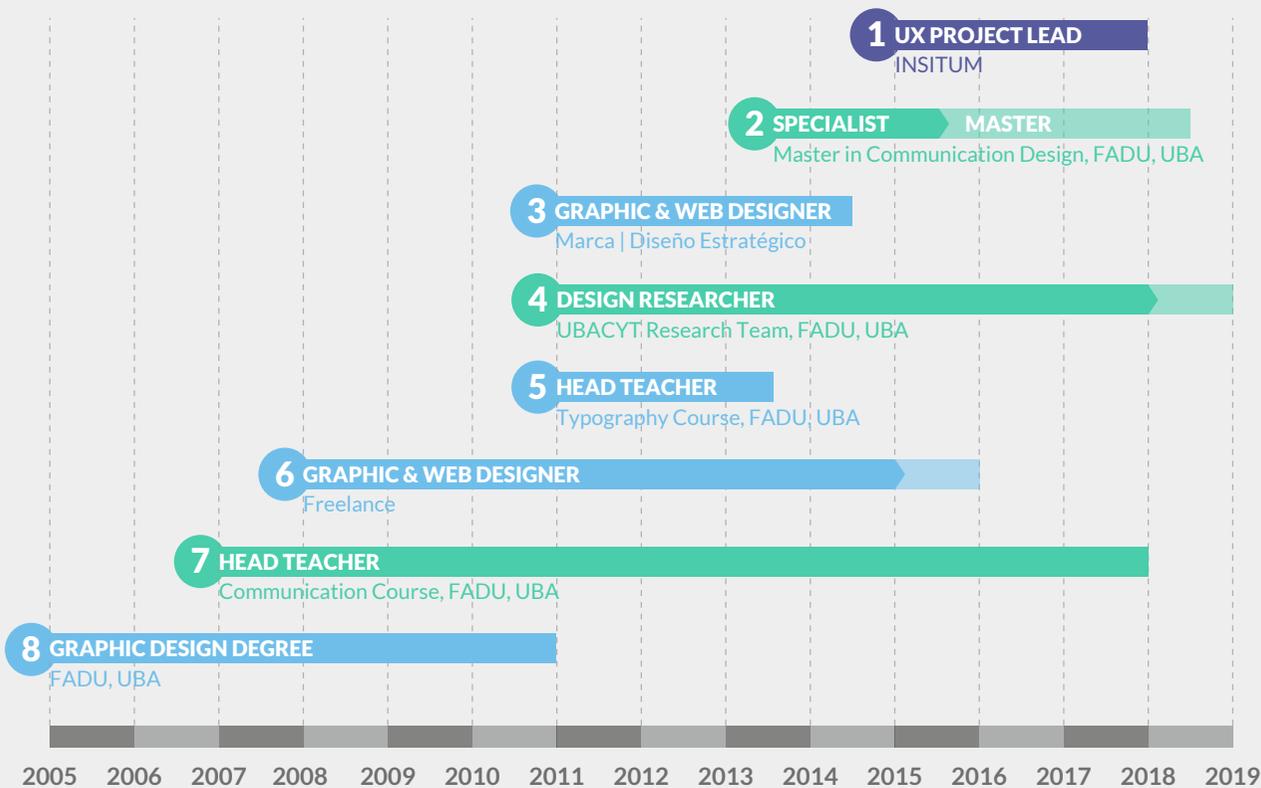
PRESENTATION +
UX PORTFOLIO

# EVERYONE IS A MIX.
# THIS IS MY PROFESSIONAL DNA.

My professional and academic path got me pivoting around the Design and Research fields.

**DESIGN**　　**RESEARCH**

**1** UX PROJECT LEAD
INSITUM

**2** SPECIALIST　　MASTER
Master in Communication Design, FADU, UBA

**3** GRAPHIC & WEB DESIGNER
Marca | Diseño Estratégico

**4** DESIGN RESEARCHER
UBACYT Research Team, FADU, UBA

**5** HEAD TEACHER
Typography Course, FADU, UBA

**6** GRAPHIC & WEB DESIGNER
Freelance

**7** HEAD TEACHER
Communication Course, FADU, UBA

**8** GRAPHIC DESIGN DEGREE
FADU, UBA

2005　2006　2007　2008　2009　2010　2011　2012　2013　2014　2015　2016　2017　2018　2019

**FADU:** Facultad de Arquitectura, Diseño y Urbanismo *(Faculty of Architecture, Design and Urbanism)*
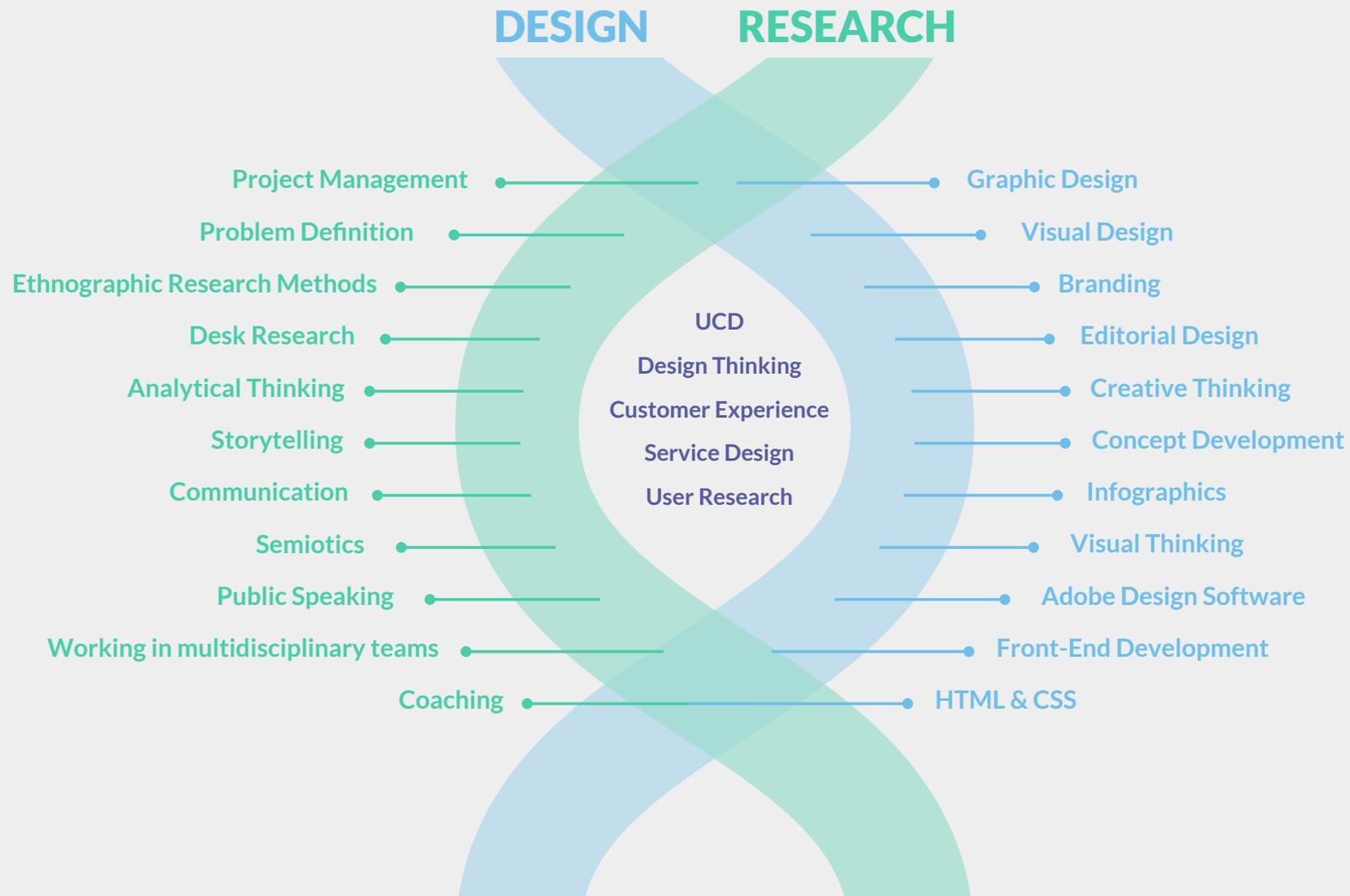**UBA:** Universidad de Buenos Aires *(University of Buenos Aires)*
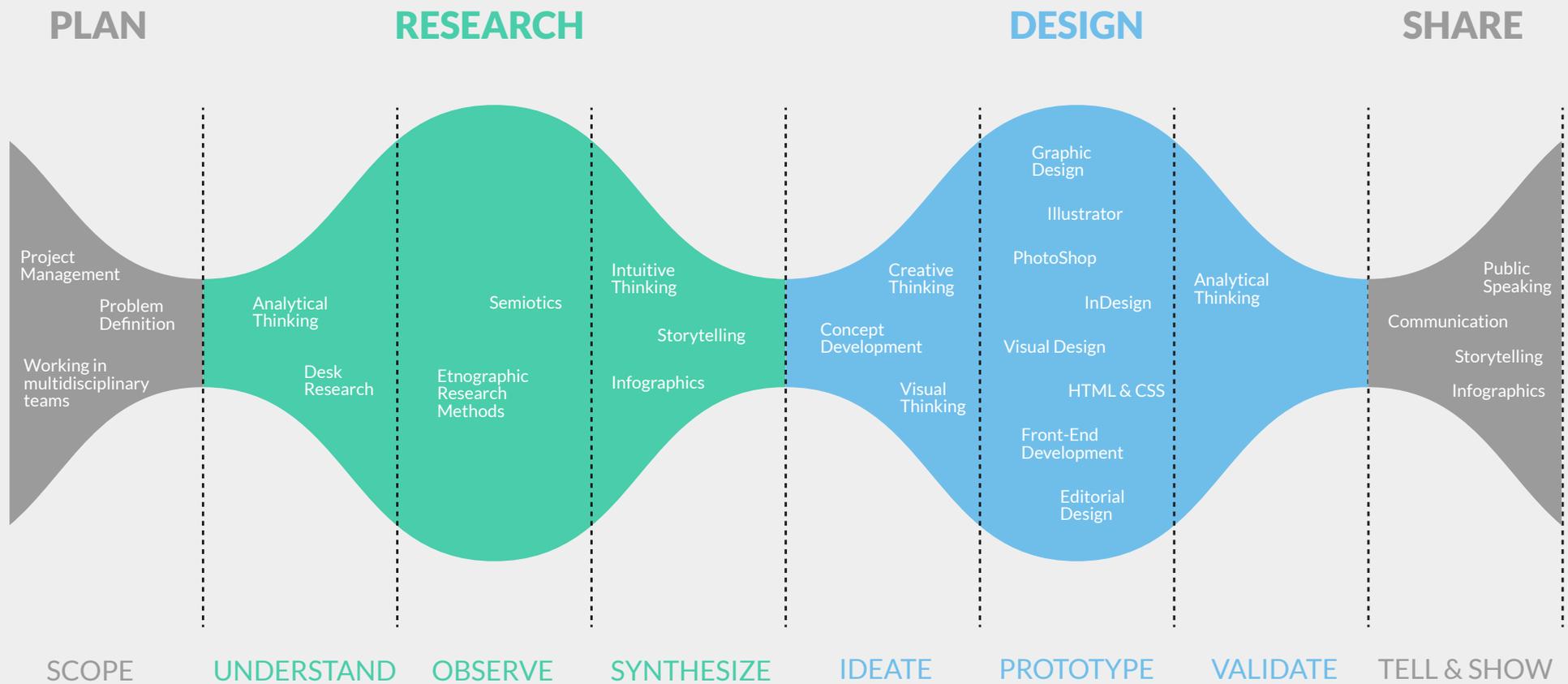**UBACYT:** Universidad de Buenos Aires Ciencia y Técnica *(University of Buenos Aires Science And Technique)*
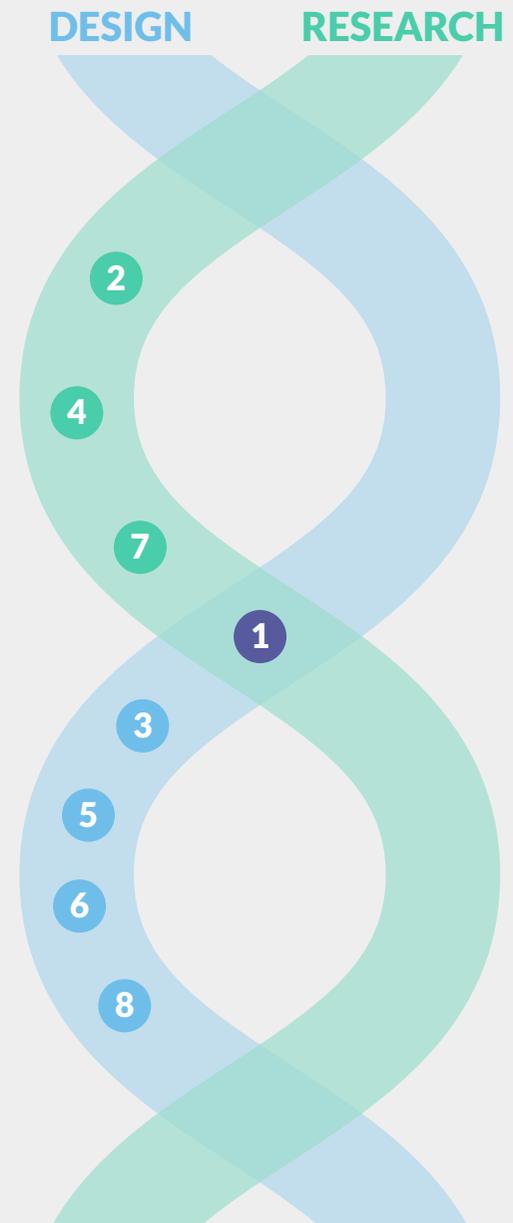
# DESIGN AND RESEARCH FIELDS PROVIDE ME WITH A SPECIFIC SET OF SKILLS.

The following are the skills I've acquired from each field.

**DESIGN**     **RESEARCH**

Project Management — — Graphic Design

Problem Definition — — Visual Design

Ethnographic Research Methods — — Branding

Desk Research — **UCD** — Editorial Design

Analytical Thinking — **Design Thinking** — Creative Thinking

Storytelling — **Customer Experience** — Concept Development

Communication — **Service Design** — Infographics

Semiotics — **User Research** — Visual Thinking

Public Speaking — — Adobe Design Software

Working in multidisciplinary teams — — Front-End Development

Coaching — — HTML & CSS

# SKILLS ACQUIRED ARE KEY
# IN EVERY UX DESIGN PROCESS.

Here's how the skills I've obtained match the UX Design process.

**PLAN**          **RESEARCH**          **DESIGN**          **SHARE**

Project Management

Problem Definition

Working in multidisciplinary teams

Analytical Thinking

Desk Research

Semiotics

Etnographic Research Methods

Intuitive Thinking

Storytelling

Infographics

Creative Thinking

Concept Development

Visual Thinking

Graphic Design

Illustrator

PhotoShop

InDesign

Visual Design

HTML & CSS

Front-End Development

Editorial Design

Analytical Thinking

Public Speaking

Communication

Storytelling

Infographics

SCOPE          UNDERSTAND          OBSERVE          SYNTHESIZE          IDEATE          PROTOTYPE          VALIDATE          TELL & SHOW

# MY UX PRINCIPLES

As a UX researcher and consultant, I spent a lot of time designing principles and guidelines for companies. These are the ones I've designed for myself to face each stage of every user-centered project.

All the works displayed in the next slides intend to show my flexible range of skills and how I put my principles into practice.
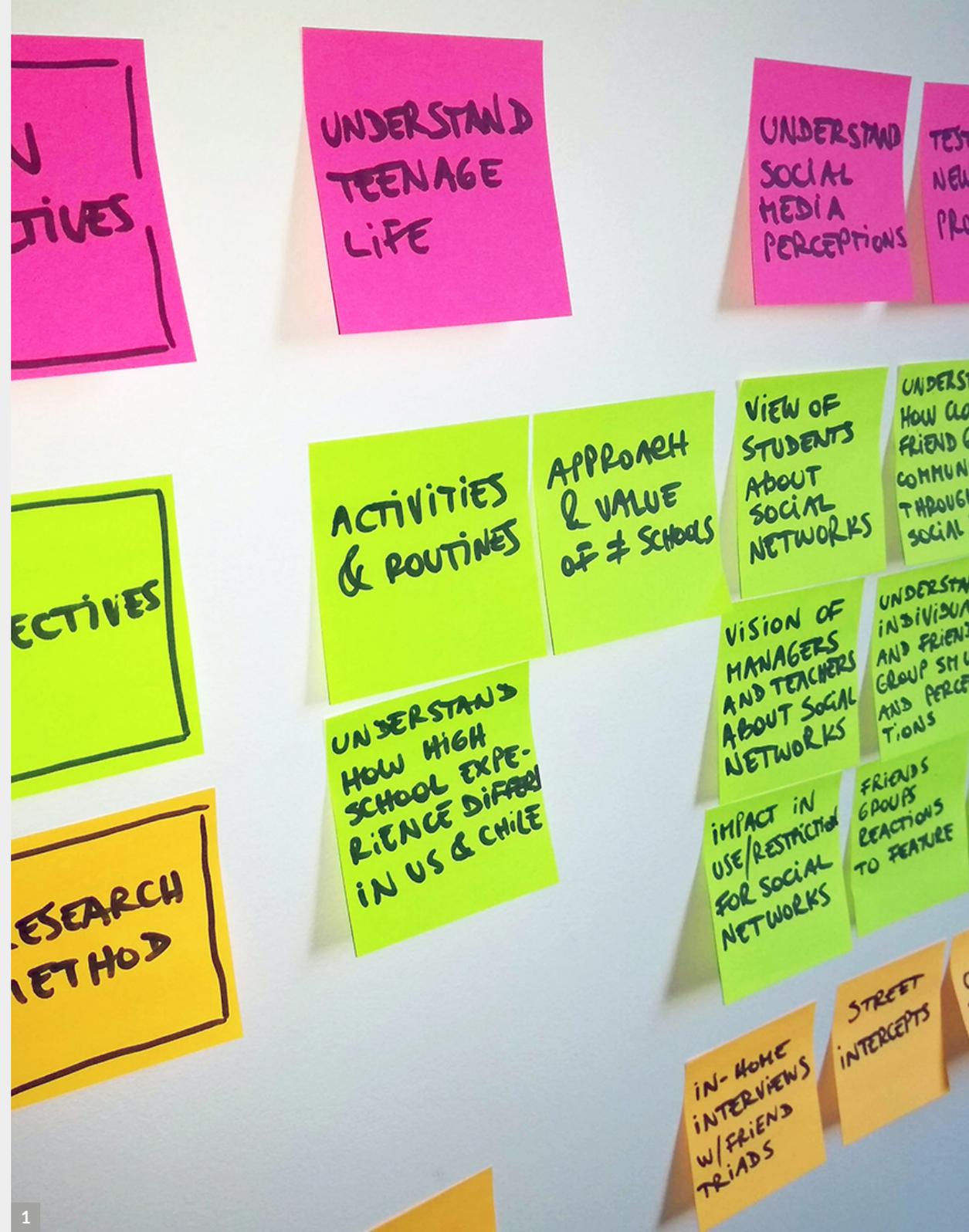
# PLAN

# BREAK DOWN PROJECT'S GOALS TO GET A PLAN

Determining the project goals and narrowing down what's in and out of scope are key to formulate a plan before conducting field research. Research goals will help formulate the questions we need to ask to users and understand what we want to uncover. The type of questions will make us choose the right research method, the length and duration for the fieldwork and its participants.

When creating a research strategy for a project with Facebook, breaking through the project's purpose into smaller goals helped creating a detailed and thorough plan that included a total of 6 different research methods.

**Role in the project**
Project Leader

# ALLOW YOURSELF TO DEVIATE FROM THE SCRIPT



A detailed plan before conducting field research is key to accomplish the project's goal. However, gathering information that doesn't necessarily match the objective might lead to new opportunities for design. You never know what the research will uncover, so be open mind, make room for the unexpected and learn from it.

**1. 2.** In a project for MetLife whose goal was to improve customer's experience by mapping and solving current client's pain points, only people who had an insurance were initially considered to participate in the research. But interviewing also individuals without an insurance would help us understand the reasons behind their decision and get clues about new opportunities that may lead the company to get a new, unattended market.

**Role in the project**

Project Leader
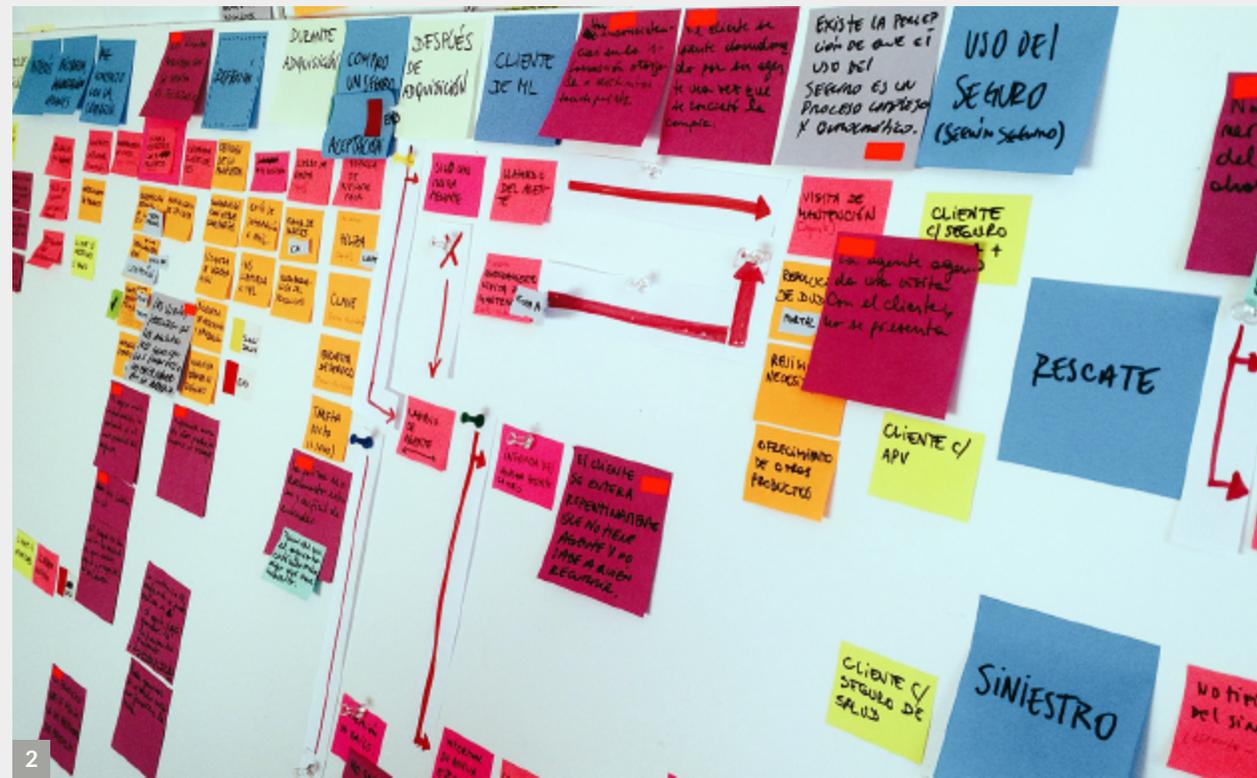
# TEAM UP WITH YOUR CLIENT

You and your client have a shared goal and are together for improving the user experience. Clients usually have a lot of information that may be useful for the project, such as analytics. The researcher have a lot of knowledge about users gathered in previous researchs, so foster the data sharing and team up together to accomplish the project's goal.

**1.** In a project with Facebook, the SF team travelled to Santiago to understand from first hand the Chilean teen life and get their perception and reaction to a feature they were working on. They have conducted previous research and I have already worked on that feature, so we had a lot of data to share that help us easily see the gaps in our knowledge and improve our research questions.

**Role in the project**
Project Leader

# HAVE YOUR CLIENT ENJOY A GREAT EXPERIENCE

If you're going to improve your clients' business experience, make sure they're having a great time themselves while working with you. Bring your clients along into the design process, invite them to the fieldwork, keep them posted about every step in the project and share results regularly so you are both sure to be on the same page.

# RESEARCH

# GET DEEPLY INVOLVED WITH PEOPLE AND THEIR CONCERNS

The baseline of every UX project is empathy. In spite of the vulnerable situation empathy may put the researcher in (you have to open your eyes, your ears, and also your heart), soaking completely in other's individual stories is the best way to gather detailed personal accounts, feelings and desires that lead to good insights.

**1.** Interview with a MetLife's client to understand her reasons for getting an insurance. **2.** Interview to a teen to understand perceptions about a new Facebook feature. **3.** Usability session to understand users' pain points when using a new Facebook feature.

**Role in the projects**
Project Leader

# BECOME YOURSELF THE USER YOU STUDY

There's no better teacher than experience. Putting yourself literally in your user's shoes is the best way to adopt the user's point of view. This ensures the researchers to get quality information that will help them understand user's personal accounts, reasonings and experiences and provide an accurate -and truly lived- explanation for people's actions and behaviors.

**1. 2. 3.** During a project aimed to improve McDonald's customer service and to enhance its employees experience, I worked as an incognito crew member for a week. This allowed me to live from within the experience a new McDonald's employee goes through during the process of recruitment, immersion and training.
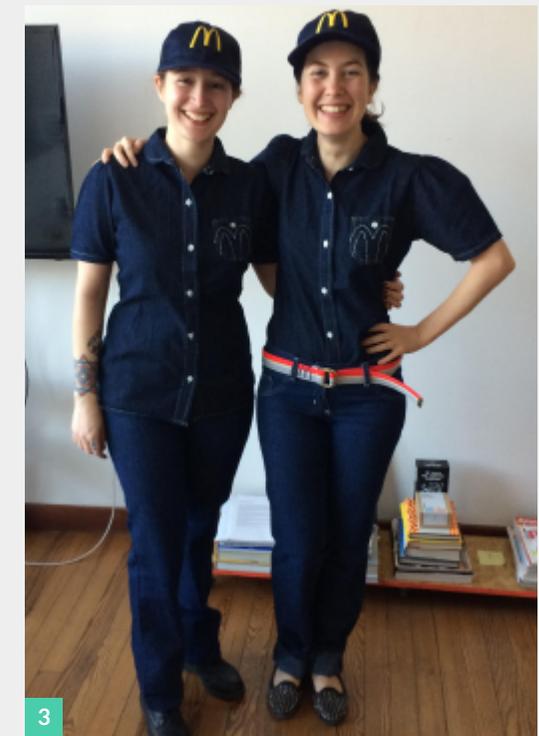
**Role in the project**
Consultant



1



2



3

# KNOW PEOPLE IN THEIR EVERYDAY CONTEXT

Getting to know users in their natural environment provide an accurate portrayal of a person's day-to-day activities. Observing a person's context is also a great opportunity for the researcher to collect data and information that help them understand people's choices and preferences.

**1.** School visit to understand how the high school experience from Chilean teens differs from those of US teens. **2.** Street intercept outside an Uruguayan university to understand general perception to a new Facebook app**. 3.** Street intercept in a popular area for Chilean teens to hangouts socially, to gauge initial reactions to a Facebook feature.

**Role in the projects**
Project Leader

# BE ABSOLUTELY INVISIBLE

The presence of a researcher might slightly influence people's answers when they're required to report, assess or show their own actions and behaviors to researchers. So distance is a key attitude the researcher must take for the people to act and speak freely and for the researcher to gain true understanding.

**1.** When shadowing a MetLife agent in her visit to a customer, I had to make sure not to interfere in her job of preventing the customer against cancelling the insurance. **2. 3.** While observing moms in such a private moment as changing their babies in their own homes, I had to make sure they still were having a familiar moment even when a stranger was in the house.

**Role in the projects**
**1.** Project Leader
**2. 3.** Consultant
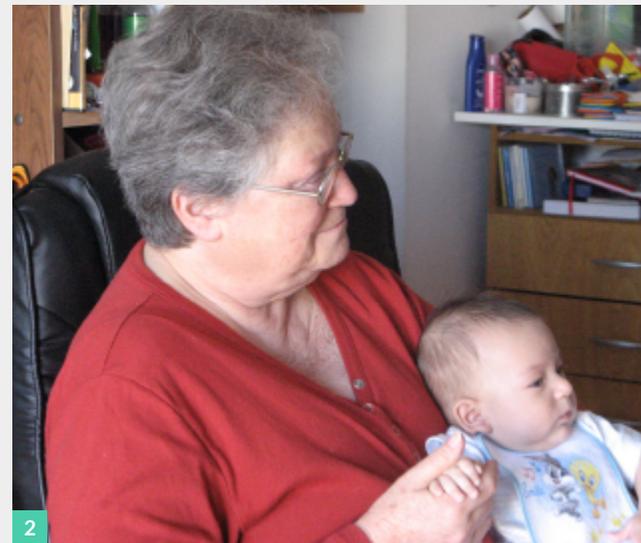
# THINK
# VISUALLY

Visual thinking is a way to organize your thoughts and a great way to convey complex or potentially confusing information. Even in early stages of your research, take the time to make sketches and diagrams to organize the information you've gathered so far. Later on, this will help to communicate ideas effectively.

Visualizing helps to find relations between data that are not perceivable in any other way and has a great impact on understanding.
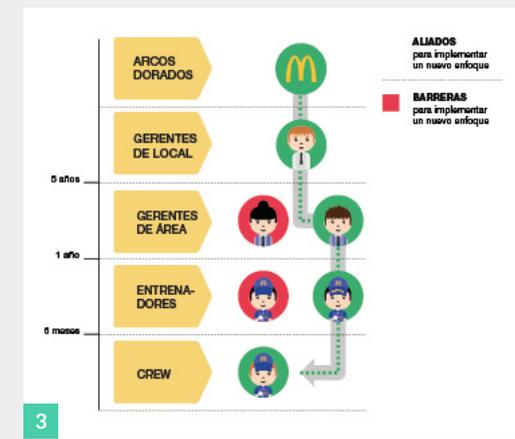
**1. 2. 3.** Illustrations that served to explain aspects of McDonald's internal culture and its effects of new employees.
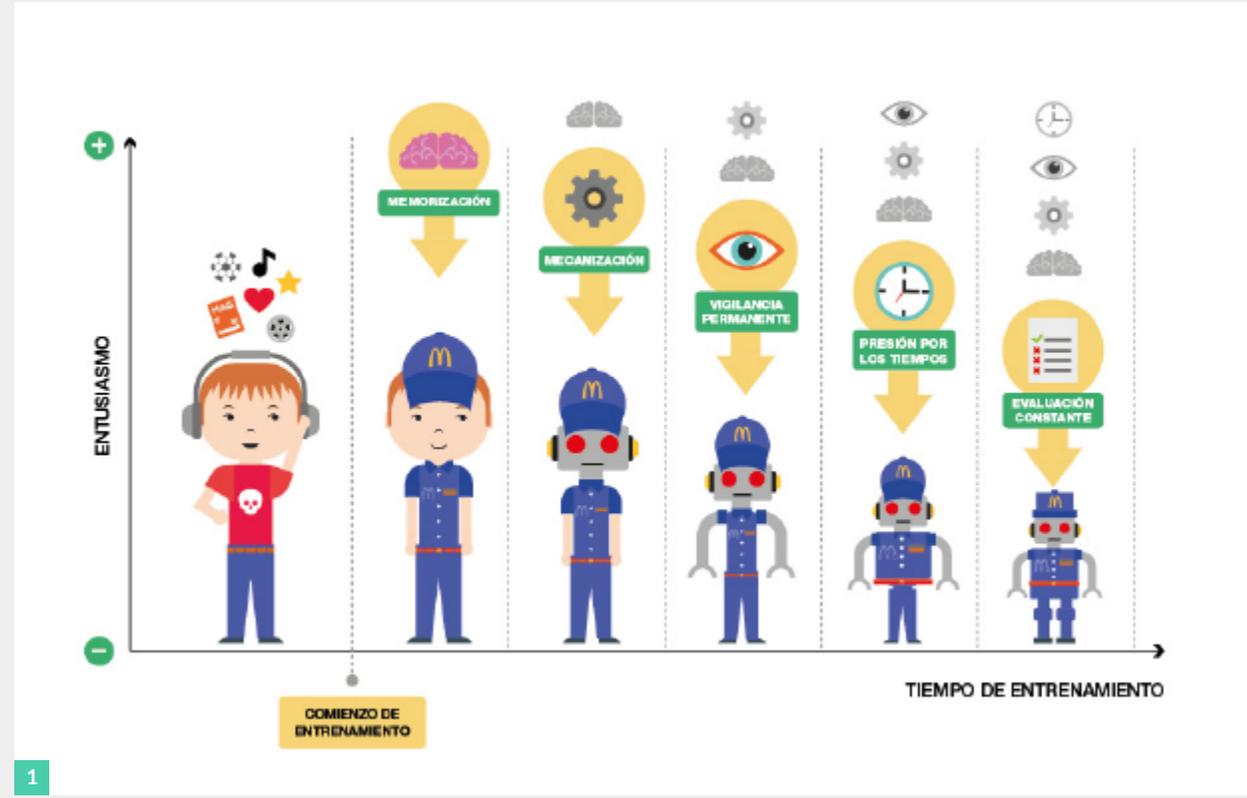
# METLIFE
# CX JOURNEY MAP
## Insurance Costumers

**REFERENCES**

BEFORE THE PURCHASE

DURING THE PURCHASE

AFTER THE PURCHASE

01 A need to be protected develops

02 Insurances start being considered as an option

03 Insurance agent contacts prospect

04 Interview with agent

05 Purchase decision

06 Relationship with MetLife

07 Having needs about the insurance
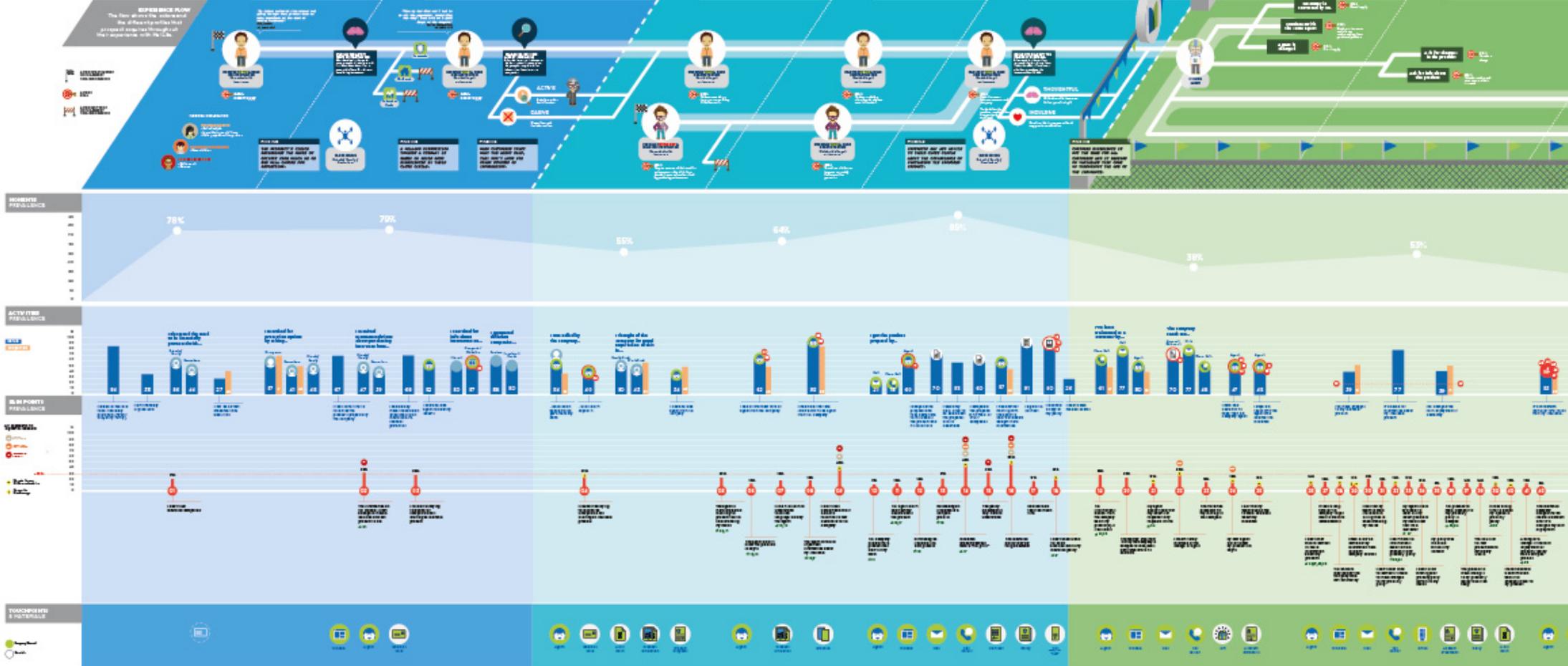
VIEW MORE on Bē

# DESIGN

# FUEL IDEATION WITH FUNNY ACTIVITIES

During co-creation techniques, better ideas come when people is having fun and enjoying a good time. Games are an excellent way to bridge any language gap between researchers and users, to get people's brain in action and to allow participants to discover new insights through creativity.

**1.2.** Co-creation workshop in Mexico City in which Tostitos' consumers had to prepare a dish using the snack as a base and discuss their creations later. This allowed me to understand collective ideas about flavors and possible combinations. **2.** Co-creation session with McDonald's employees in which they had to play charades and put in scene usual, problematic situations with clients and propose solutions right after.

**Role in the projects**
**1.** Project Leader
**2.** Consultant

# PROVIDE MATERIALS THAT HELP PEOPLE GET INSPIRED

In creative activities that involve potential users in the process of design, giving the participants a palette of appropriate tools that enable reflection and that helps them analyze their actions in depth is efficient for them to reveal their dreams, fears, aspirations, and ideas.

**1.** For the complex task of creating a new concept for an air deodorant's fragrance, participants needed both to materialize and describe different aspects of the world the scent would evoke in a set of images, colors, words and phrases. Along with visual and thematic stimuli used as inspiration, these cards provided the people with a vocabulary to express their visual, olfactory, auditory, tactile and flavor sensations.

**Role in the project**
Card concept, research and graphic design
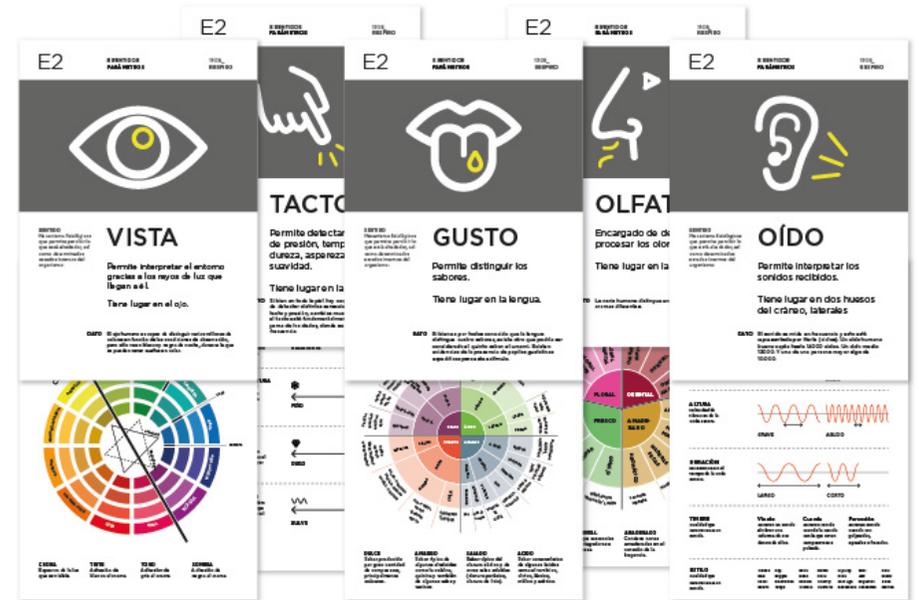
# PROTOTYPE IN AS HIGH FIDELITY AS YOU CAN

Having a prototype as early as possible and with specific design details helps the researcher evaluate design successes and failures earlier and, consequently, find the best resolution faster. The closer to reality a prototype is, the easier to determine if a design actually works in context.

**1. 2. 3. 4.** McDonald's project second phase required to prototype and test a wide range of solutions that went from very physical to very abstract categories (organizational, infraestructural, clothing, attitudinal and motivational). High fidelity prototypes included making explicit the crew's expertise , customizing the uniform, intervening the crew room, amongst others.

**Role in the project**
Consultant and graphic designer
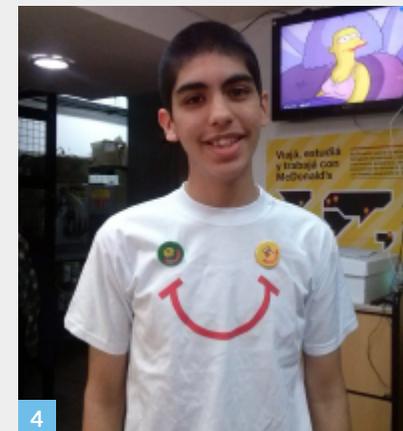
# SHOW VARIANTS WITH BOLD AND SYSTEMATHIC DIFFERENCES

Knowing the intention of each prototype design aspect helps the researcher gather structured information when validating it with users. Make sure to have a concept behind each prototype and to make it bold. However, be open to surprise: you may find information about design aspects that you didn't even suspected were relevant to users.

**1.** A project aimed to bring to life 3 concepts for non-alcoholic drinks included creating guidelines and recommendations about naming and pack. I designed different pack proposals for every drink concept. Each proposal stressed a particular concept's trait. Being systemathic helped me understand the user's preferences and rejections for a specific pack.

**Role in the project**
Consultant and graphic designer

# STITCH FINDINGS TOGETHER INTO A COMPELLING STORY THAT EXPLAINS WHY

All the findings in UX are based on data collected by a series of research methods. But it's necessary to turn that collection of findings into a story: a collective narrative that glues them together into a structure that makes sense and tells why those findings matter.

**1.** When defining the final concept for a new alcoholic beverage that AbInBev had created (including consumer profile, insight, concept board, consumption occasions, and guidelines for beverage presentation), a lot of findings about user's lifestyle and alcohol consumption habits were gathered, but not all of them served to inform the drink's final concept. Only that information that helped shape a new opportunity for the beverage was used in storytelling.

**Role in the project**
Consultant

# SHARE

# DISCARD DATA THAT DOESN'T LEAD TO TAKE ACTION

Putting your data into a story necessarily requires to discard some of it. During a project, a lot of findings are gathered, some of which may not address the projects' goal. Though it may tempting to tell your client all your discoveries, he or she's likely to be interested only in those that help him/her to take action. No need to worry: this information can be saved as it contains useful insights about the industry and can certainly be of great use in further researches.

# MAKE SIMPLE WHAT'S COMPLEX

Complex processes might be quite simple to explain when its structure is understood from a holistic point of view. Visualizing complex processes through infographics is an effective tool for explaining them to others.

**1. 2.** The Coca-Cola Company was concerned in understanding why it took so much time to launch new products to the market. One of the findings was Project Managers and areas involved in the process didn't have a holistic vision of it. Visualizing it helped all areas understand when they had to act and why, and what input they had to bring in every stage. This infographic led to a manual for Project Managers.

**Role in the project**
Consultant and graphic designer
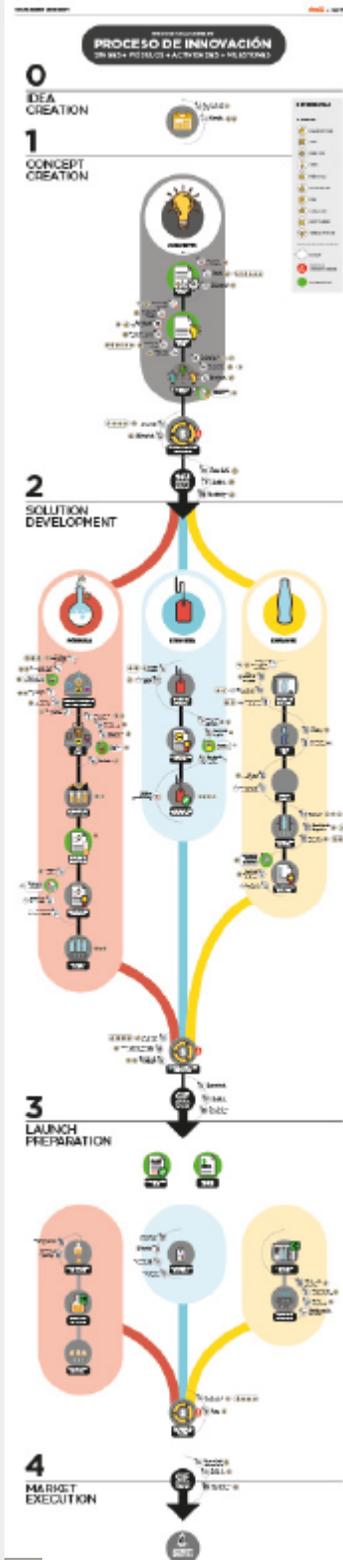
# SEGMENTACIÓN DE PROYECTOS
## ACTIVIDADES A REALIZAR POR TIPOS DE PROYECTO

## FÓRMULA

- Brief para desarrollo de prototipos
- Armado de draft de fórmula
- Evaluación de draft de fórmula
- Desarrollo de prototipos
- Envío y desaduanaje
- Ejecución de pruebas
- **PRUEBAS INTERNAS KO Y SELECCIÓN**
- Desarrollo de prototipos
- Envío y desaduanaje
- Ejecución de CPT Test
- **CPT TEST**
- Toplines CPT
- Resultados
- **ANÁLISIS DE ESTABILIDAD**
- **SUSTENTO CIENTÍFICO**
- Solicitud de registro sanitario
- Registro de producto en trámite
- Aprobación del registro sanitario 1º orden
- Aprobación del registro sanitario 2º orden
- **REGISTRO DE FÓRMULA**
- **PRUEBAS PILOTO**

## ETIQUETA

- Brief para desarrollo de etiqueta
- Diseño de etiqueta y ajustes
- **DISEÑO DE ETIQUETA**
- Búsqueda marcaria definitiva
- Solicitud de registro
- Plazo de publicación y oposición
- Aprobación final de registro
- **REGISTRO DE NAMING**
- Subida a las bases (KOART-BLUE)
- **APROBACIÓN INTERNA KO**

## EMPAQUE

- Brief para desarrollo de prototipos
- PO para diseño de empaque
- Elaboración de propuestas
- Elaboración de planos
- **DISEÑO DE EMPAQUE**
- PO para mock up
- Fabricación de mock up
- **MOCK UP**
- PO para molde piloto
- Fabricación de molde piloto
- **MOLDE PILOTO**
- Pruebas de validación
- Resultados de las pruebas
- Firma de plano final
- **VALIDACIÓN EN LÍNEA**
- Búsqueda marcaria de planos
- Solicitud de registro de planos
- Aprobación de planos
- **REGISTRO DE EMPAQUE**

## TIPOS DE PROYECTO

MÓDULOS — MACRO ACTIVIDADES A REALIZAR

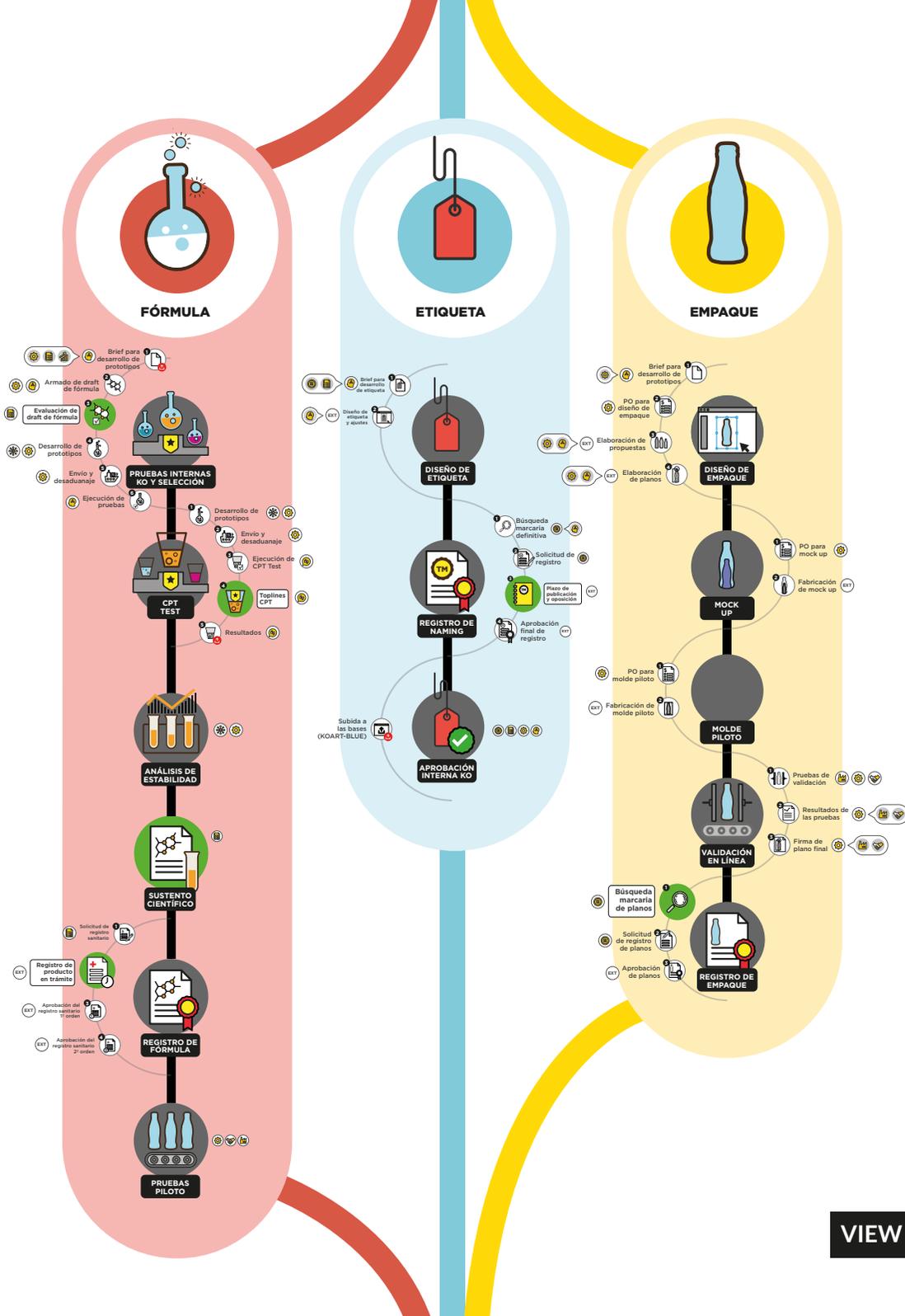| | NUEVO EMPAQUE | | | NUEVO PRODUCTO | | |
| --- | --- | --- | --- | --- | --- | --- |
| | RESIZING | SHAPE | | CAT. EXISTENTE | | |
| | | | | EXT. SABOR | EXT. LÍNEA | |
| | | PACKAGING COLDFILL | PACKAGING HOTFILL | | SIN PACKAGING | PACKAGING COLDFILL |
| | PET 300 ml Aquarius | Aluminium bottle, Cepita PET, nuevas botellas de Powerade y Fuze Tea | | Aquarius limonada, Schweppes manzana | Aquarius Delight, Powerade Zero, Aquarius con gas | |
| **0 IDEA CREATION** | | | | | | |
| BUSINESS PLAN | | ● | ● | ● | ● | ● |
| BRIEF PROYECTO | ● | ● | ● | ● | ● | ● |
| BRIEF CONCEPTO | | ● | ● | ● | ● | ● |
| CONCEPT TEST — Fórmula | | | | ● | ● | ● |
| CONCEPT TEST — Pack | | ● | ● | | | |
| CONCEPT TEST — Naming | | | | ● | ● | ● |
| **1 CONCEPT CREATION** | | | | | | |
| CADENA DE VALOR | | ● | ● | ● | ● | ● |
| FÓRMULA (TEST DE FÓRMULA) | | | | CPT | CPT | CPT |
| ETIQUETA | ● | ● | ● | ● | | ● |
| EMPAQUE | ● | ● | ● | | | ● |
| **3 LAUNCH PREPARATION** | | | | | | |
| CADENA DE VALOR | ● | ● | ● | ● | ● | ● |
| FÓRMULA | | | | ● | ● | ● |
| ETIQUETA | ● | ● | ● | ● | | ● |
| EMPAQUE | ● | ● | ● | | | ● |
| **4 MARKET EXECUTION** | | | | | | |
| CADENA DE VALOR | ● | ● | ● | ● | ● | ● |
| MARKET EXECUTION | ● | ● | ● | ● | ● | ● |

Gantt 1 · Gantt 2 · Gantt 3 · Gantt 4 · Gantt 5 · Gantt 6

# HELP YOUR CLIENT UNDERSTAND WHERE YOU COME FROM AND WHERE YOU GO

Infographics are a powerful way of presenting data and great tools to help your client understand both the project plan and its evolution. Sharing this kind of information provides a purpose to the work you're all doing and how you're achieving a shared goal.

**1.** The infographic showed Mondelez the ideas that were created in different stages of the project before arriving to the 10 final ones in a product innovation project. **2.** The infographic intended to map all the prototypes that were going to be tested during a project whose goal was to design a new training for McDonald's employees.

**Role in the projects**
**1. 2.** Consultant and graphic designer



1



2

# ORIGIN & EVOLUTION OF THE CONCEPTS

CONCEPT STAGES

01 INITIAL WORKSHOP

02 INTERNAL IDEATION

03 PRODUCT DEFINITION

CONCEPT BELONGING TO

**Outer ring categories:** BURBUJAS DE AIRE · HOLIDAYS · REACTION · LAYERS · NÚCLEO · 5 SENTIDOS · SWITCH · GROUP PACK · PANTONE · HALLISTIC

**Concepts:**
EXPLORE · SHAKE PACK · INSPIRATION · CRUNCH · SPARKS · SELF SERVICE · SHAZAM · DICE · MINI CHALLENGE · CÓCTEL · GLOW · LAYERS · SURPRISE · VENTURA · 5 SENTIDOS · VARIETY PACK · NÚCLEO · INV. FLAVS · LIGHT UP! · MICRO PARTÍCULAS · FREEZE · BREAK TIME · RECREO METRO · LÁMINAS FRESCURA · PREMIUM · PLAY TIME · HALLSHHH · O2 · BREAK REMINDER · MENTAL · GEL · BREATHE IN/OUT

**Inner grey nodes:**
EXPLORER · SUMMER · TIN COLLECTION · CRUNCH · WATER CHILL · LAYERS · FRESH · BIG PACK · DOUBLE UP · HALLSHHH · FLASH · AIR · AIR EXPERIENCE · INSTANT

# SEMANAS

| 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 |
|----|----|----|----|----|----|----|----|

## ESTRUCTURA DEL PROTOTIPO

Iniciativa

NOMBRE DEL PROTOTIPO

TIPO — AUTORÍA
COMPLEJIDAD

### ÁREA
- RECLUTAMIENTO
- ENTRENAMIENTO
- MOTIVACIÓN

### ETAPAS
- LANZAMIENTO
- REVISIÓN/AJUSTES
- DEFINICIÓN

### TIPO
- ORGANIZACIONAL
- ACTITUDINAL
- MOTIVACIONAL
- INFRAESTRUCTURA
- INDUMENTARIA

### COMPLEJIDAD
- BAJA
- MEDIA
- ALTA

---

Espontaneidad del crew
**CREW ESPONTÁNEO ANTE EL CLIENTE**
INSITUM + AD

Flexibilización del uniforme
**NAMETAG PERSONALIZADO**
AD

Atención enfocada hacia el cliente
**DEBATE EN ORIENTACIÓN**
AD

Equipo compañero
**VOTACIÓN DE "GERENTE DEL MES"**
INSITUM + CREW

Mejorar la dinámica de trabajo
**TRABAJA DONDE QUIERAS**
AD

Motivación del crew
**NUEVO BREAK**
INSITUM

Equipo con líderes
**EVALUACIÓN DE SEMANA LABORAL**
INSITUM + CREW

Personalización del crew room
**LOCKERS PROPIOS O COMPARTIDOS**
INSITUM

Equipo con líderes
**REUNIÓN CREW-GERENTE**
V02
INSITUM + CREW

Reconocimiento al crew
**COMPETENCIA INTERNA POR ÁREA**
INSITUM

Personalización del crew room
**MÚSICA EN EL CREW ROOM**
AD

Equipo con líderes
**NUEVOS OBJETIVOS PARA GERENTES**
AD

Comodidad del cliente
**MENÚ DE MCDONALD'S**

Flexibilización del uniforme
**CASUAL FRIDAY**
AD

Personalización del crew room
**CREW ROOM INTERVENIDO**
CREW

Participación en la compañía
**COMPETENCIA "IDEAS FELICES"** (en desarrollo)
AD

Flexibilización del uniforme
**LOOK MÁS PERSONAL**
INSITUM

Reconocimiento al crew
**FELICITACIONES FRECUENTES**
INSITUM

Participación en la compañía
**FEEDBACK DEL STAFF** (en desarrollo)
AD

Mejorar la dinámica de trabajo
**TEAMS POR CAJA**
INSITUM

Interacción crew-cliente
**2 CREW EN EL LOBBY**
INSITUM + CREW

Participación en la compañía
**COMPETENCIA INTERNA DE IDEAS** (en desarrollo)
AD

Reconocimiento al crew
**CREW ESPECIALISTA**
AD

# CRAFT A MEMORABLE DELIVERABLE



A memorable, tangible result of the project constitutes a nice souvenir of the work developed together with your client and can also help the team present and push the project inside the company in general.

**1. 2.** As a result of a product innovation project for Mondelez, I developed a set of double-sided postcards, containing detailed information for each product concept designed for the project.

**Role in the project**
Consultant and graphic designer



VIEW MORE on **Bē**

# THANK YOU!

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