

Dave Sherrod

User Experience and Product Design Team Leader

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Highlights of Expertise

- Digital Product Design Team Leadership
- User Centered Design and Design Thinking Processes
- Qualitative and Quantitative Research and User Testing Methodologies
- Leveraging Analytics for informed design (Google Analytics, Salesforce, Vendor Data Streams)
- Roadmap building, story-writing and grooming in an agile environment
- Vendor Relationships and Integration
- Artifact creation for communication, collaboration, and documentation during research, planning, design, and testing phases of the design process (Personas, Journey Mapping, Wires, Lean to High-Fidelity Prototyping, A/B and multivariate user testing session)
- Smart Components and Atomic Design Systems
- SAAS and Enterprise Software product design in Fintech, Banking, Trading, Advisory Services, Lending, Insurance, Taxation, Mortgage, and Stock Plan Administration

Recent Career Experience

DIRECTOR OF UX/UI (April 2019 – Present)

First Tech Federal Credit Union, San Jose, CA

Coached and inspired a multidisciplinary team of six in the research, design, and testing of banking and lending digital product experiences.

- Team leader, coach, and mentor of six researchers, info architects, and front-end designers in the creation and improvement of First Tech banking and lending digital product experiences within Online Mobile Banking, Mobile X IOS/Android App, and OMNI application experiences for home loans, car loans, and student loan refinancing.
- Guide my team in the transformation of user needs and business goals into compelling experiences during all stages of the research, design, and user testing initiatives.
- For the purpose of iteratively improve digital task and goal achievement, I strategize, determine, plan, and guide my team toward appropriate feedback-gathering, qualitative and quantitative opportunities.
- Efforts during the Ellie Mae mortgage application overhaul project contributed to a near doubling of First Note Mortgage loan production (\$336.1M planned, \$641.5M achieved) from Jan-April 2020 while scoring a related NPS score of 80 for April 2020.
- Efforts during online account management and card settings initiatives (Q4 2019 through Q2 2020) contributed to call center volume reduction for members calling about (mobile and desktop) *Change Account Password*, *Credit Cards' Replace Card*, *Find and Dispute Transactions*, *Lock Card*, and card management-related settings.
- Accountable for empathetic user advocacy in product design while being responsible for synchronization and compliance with internal branding, design guides, vendor front-end UI and backend processes, and internal business and functional requirements.
- Maintain roadmap and UX/UI team production schedules for research, design, and testing initiatives.
- Leverage Google analytics and Salesforce data to further inform and validate design decisions while continually socializing and integrating customer voice across all digital products.
- Maintain and expand mobile IOS, Android, and responsive web design systems.
- Evangelize User-Centered Design and Design Thinking methodology throughout the company while promoting team efforts and strengthening internal partnerships.
- Partner and collaborate with cross-functional teams in an Agile Scrum framework.

DIRECTOR, VISUAL DESIGN (Oct 2015 to Mar 2019)

Prudential Financial, Sunnyvale, CA

Pod leader of three in the research and design of Link by Prudential and personal finance digital applications and tools.

- Led visual, interaction, and experience design for *Link by Prudential, Service Center (a self-help center)*, and multiple personal finance and advisory desktop and mobile applications, tools, and calculators.
- Pod leader of three, I acted as doer manager for the design and production of information architecture and flows, prototyping, and artifact creation for A/B and multivariate user testing initiatives.
- Co-managed the digital product creative schedule, requirement gathering, sprint grooming, and roadmap synchronization, ensuring timely deliverables and influencing cadence.
- Represented Visual within the UX team presenting to and coordinating with and presenting to UX team members, internal Product, Engineering, and Marketing partners, and c-suite executives.
- Contributing author for Prudential's Playbook, a Bootstrap-derived, Atomic Design System.
- Created and presided over artifacts creation such as sketching, journey mapping, info architecture, experience mapping, low/high fidelity prototyping, and user feedback facilitation (surveying, A/B, and multivariate).
- Provided consultancy, asset creation, and schedule management for product roll-out and marketing collateral.

DESIGN DIRECTOR, TRADING (2009 to 2015)

E*TRADE, Menlo Park, CA

*Delivered outstanding results in the management of in-house design team and positioned as Design lead for the E*TRADE Pro trading platform and E*TRADE trading experiences.*

- Managed an in-house team of three and vendor partners to improve E*TRADE's trading experience while leading visual and interaction design initiatives for the E*TRADE Pro trading platform and Power E*TRADE Offerings. While presiding over Pro's UI/UX design, the platform was a top 3-rated trading platform over a 7-year period ('09-'15) and consistently ranked #1 amongst professional traders.
- Led design improvement, simplification, and feature add integration for trading experiences within E*TRADE Pro trading platform and E*TRADE.com. Consistent increased trading volumes during my design oversight and tenure.
- Integrated new and expanded trading capabilities for FX Futures, Exchange Traded Funds, and Enhanced Options with integrated strategy. I lead both the UI design for the Pro platform itself and pertaining Marketing collateral.
- Improved and simplified Pro's customizable trading settings and built a contextual help center within the platform.
- Lead strategy and design for a number of digital product initiatives: Bill Pay, Automatic Investing, ETF Screener, Mutual Fund Screener, Bonds Center, Mortgage-On-The-Move, and Equity Edge Online, a consistently rated #1 stock plan administration SAAS platform.

Additional career experience provided upon request.

Education

- BA, Cognitive Psychology (1995) | San Francisco State University, CA
- Certification, User Experience Expert (UX Management Specialty) | Nielsen Norman Group
- Certification, Digital Arts and Animation | Academy of Art University and City College of San Francisco

Tools of My Trade

Sketch, InVision, Adobe Cloud Suite, Figma, Zeplin, Mural, HTML, CSS, Jira, Confluence, Power Point/Keynote, Microsoft Office, Roadmunk, UserTesting.com, UserZoom, Webex/Zoom, whiteboards, sketchpads, #2 pencils, Post-It Notes

Associations & Volunteering

- BayCHI, San Francisco Bay Area Chapter of ACM SIGCHI (Member)
- Interaction Design Foundation – IDF (Member)
- Hagemann Ranch and Horse Sanctuary, Livermore Heritage Guild (Volunteer)