

# Dave Sherrod

## User Experience and Product Design Team Leader

[dave@daybydave.com](mailto:dave@daybydave.com) • portfolio “calling card”: <https://www.davesherrrod.com> • ux case: <https://davidsherrrod.com>

### Highlights of Expertise

- Digital product design team leader and user advocate
- UX-certified design director with background in cognitive psychology, visual design, and user-experience design
- UX artifact strategist and creator 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)
- WCAG 2.0-compliant iOS, Android, and responsive Atomic design systems
- User-Centered Design and Design Thinking methodologies with qualitative and quantitative research leadership
- SAAS and Enterprise Software product design in Fintech, Banking, Trading, Advisory Services, Lending, Insurance, Taxation, Mortgage, and Stock Plan Administration
- Roadmap building, story-writing and grooming in an agile environment
- Vendor Relationships and Integration

### Recent Career Experience

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#### DIRECTOR OF UX/UI (April 2019 – July 2020)

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.*

- Led all UX/UI design related initiatives, coaching and mentoring of six researchers, info architects, and front-end designers in the creation and improvement of First Tech banking and lending digital product experiences. Responsibilities included Online Mobile Banking, Mobile X IOS/Android App, and home, automobile, and student loan refinancing lending products.
- Translated user needs and business goals into ux/ui stories and ux road map, while guiding my team in the creation of compelling experiences during all stages of the research, design, and user-testing initiatives.
- Strategized, facilitated, and moderated qualitative and quantitative feedback-gathering opportunities.
- Led workshops to garner “same-page” design direction, journey-mapping and prototyping orientation.
- Led the redesign of the Ellie Mae mortgage application which resulted in 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. (Note: NPS is not my preferred validating vehicle, but our executive suite relied on it substantially).
- Led the redesign of account management and card settings improvements (Q4 2019 through Q2 2020) resulting in reduced Call Center volume reduction for members calling about requests: *Change Account Password, Replace My Card, Find and Dispute Transactions, Lock Card*, and ui-related navigation of card settings and preferences.
- Ensured all digital design output was design compliant with internal business and functional requirements, First Tech branding, vendor front-end UI integration requirements, iOS/Android and responsive design system consistency, and WCAG 2.0.
- 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.
- Maintained and expanded mobile IOS, Android, and responsive web design systems.
- Evangelized User-Centered Design and Design Thinking methodology throughout the company while promoting team efforts and strengthening internal partnerships.
- Partnered and collaborated 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) | NN/g Nielsen Norman Group
- Certification, Digital Arts and Animation | Academy of Art University and City College of San Francisco

## **Preferred Tools**

Sketch, InVision, Adobe Cloud Suite, Figma, Zeplin, Mural, HTML, CSS, Jira, Confluence, Power Point/Keynote, Microsoft Office, Roadmunk, UserTesting.com and UserZoom platforms, Webex and Zoom, whiteboards, sketchpads, Post-Its

## **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)