Jo Hoy

SERVICE DESIGN
- systemic design
- service blueprints
- policy design
- gamification

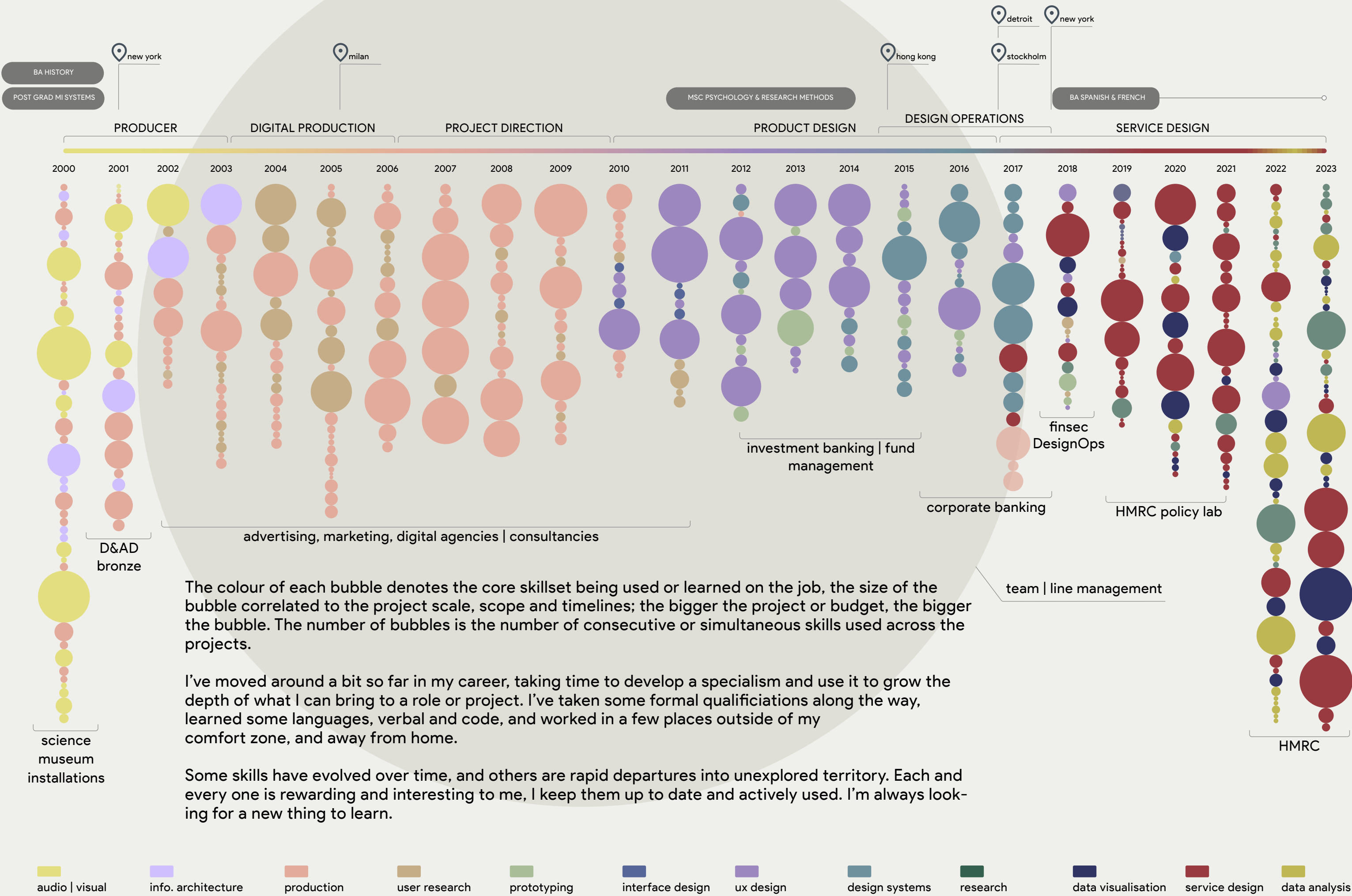## DATA
- workflow tools

DESIGN OPERATIONS
- design systems

UX / INTERACTION DESIGN
- applications portal
- digital transformation
- prototyping

BA HISTORY
POST GRAD MI SYSTEMS
MSC PSYCHOLOGY & RESEARCH METHODS
BA SPANISH & FRENCH

new york
milan
hong kong
detroit
new york
stockholm

PRODUCER
DIGITAL PRODUCTION
PROJECT DIRECTION
PRODUCT DESIGN
DESIGN OPERATIONS
SERVICE DESIGN

2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023

D&AD
bronze

science
museum
installations

advertising, marketing, digital agencies | consultancies

investment banking | fund
management

corporate banking

team | line management

finsec
DesignOps

HMRC policy lab

HMRC

The colour of each bubble denotes the core skillset being used or learned on the job, the size of the bubble correlated to the project scale, scope and timelines; the bigger the project or budget, the bigger the bubble. The number of bubbles is the number of consecutive or simultaneous skills used across the projects.

I've moved around a bit so far in my career, taking time to develop a specialism and use it to grow the depth of what I can bring to a role or project. I've taken some formal qualifications along the way, learned some languages, verbal and code, and worked in a few places outside of my comfort zone, and away from home.

Some skills have evolved over time, and others are rapid departures into unexplored territory. Each and every one is rewarding and interesting to me, I keep them up to date and actively used. I'm always looking for a new thing to learn.

Legend:
- audio | visual
- info. architecture
- production
- user research
- prototyping
- interface design
- ux design
- design systems
- research
- data visualisation
- service design
- data analysis

Timeline (right):

HMRC
2019 : present

INFOSYS
2018 : 2019

NORMAN & SONS
2017 : 2018

HSBC
2012 : 2017

MINISTRY OF JUSTICE
2011 : 2012

SKYPE
2011

ADVERTISING AGENCIES
2009 : 2011

DIGITAL AGENCIES
2000 : 2009

HMRC : SERVICE DESIGN : **Systemic Design**

role
Senior Service Designer

methods
Systemic Design
Affinity Mapping
Data Visualisation
Presentation Storytelling

tools
Sketch
Google Workspace
kumu.io

The scope of this work is classed as Official Sensitive and cannot be disclosed.

overview
We used a new design methodology to address problem root causes, rather than symptoms.

objective
Understand and analyse the problem space as a whole system, with interconnected forces whose interplay holds the keys for effective interventions.

method
I used a causal loop technique to determine a set of hypotheses that demonstrated the assumptions of the stakeholder team.
The loops were generated through affinity mapping of research outputs. I then passed this through an algorithmic tool 'kumu.io' to generate the groups between this complex set of associated elements. This was then validated and amended through direct research, and subsequently drawn into a flat visual format.

The interplay of 'forces' and feedback loops between them signify the entrenched patterns, processes, behaviours and attitudes that drive the system as a whole. When examined through the lens of 'Outcomes', the leverage points for change were determined.

From this I was able to identify the leverage points that could address the root causes and enable effective systemic change.

outcome
The outcome maps and causal loop diagrams allowed me to craft an engaging narrative, told through the voices of our direct research, demonstrating how changes to leverage points could make effective change towards the target metrics. This has generated a series of tactial interventions towards a metric-based strategic goal, currently in design and production.
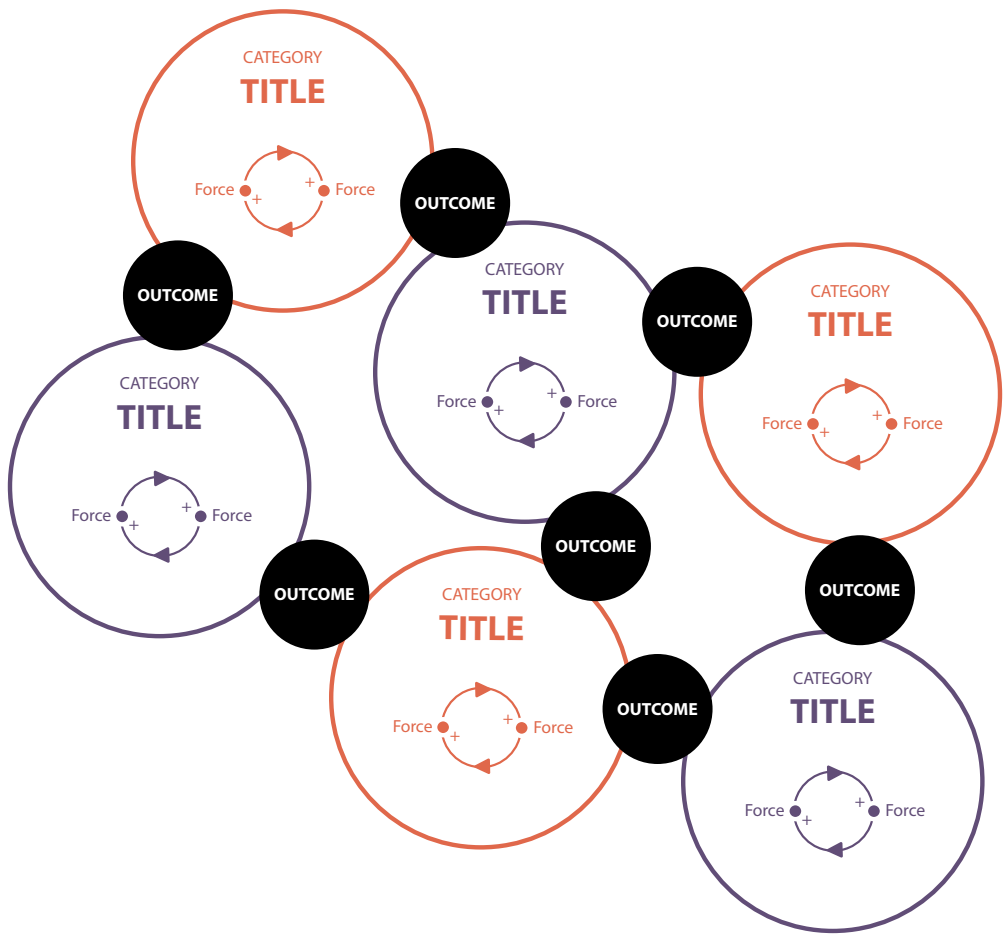
OUTCOME MAP
Examining the forces at play, through research and how they are reinforce or inhibit each other, leading to outcomes specific to the problem domain.

Redefined after research, and co-created with stakeholder, to effect a map of desired transitions and effective outcomes. The juxtaposition of the current view with the desired view led to the generation of a series of 'campaigns' to deliver these desired outcomes.

CAUSAL LOOP
Derived from the initial Outcome Map, the causal loop diagram examines the problem landscape, through a holistic, systemic lens, understanding the root causality of observable symptoms.
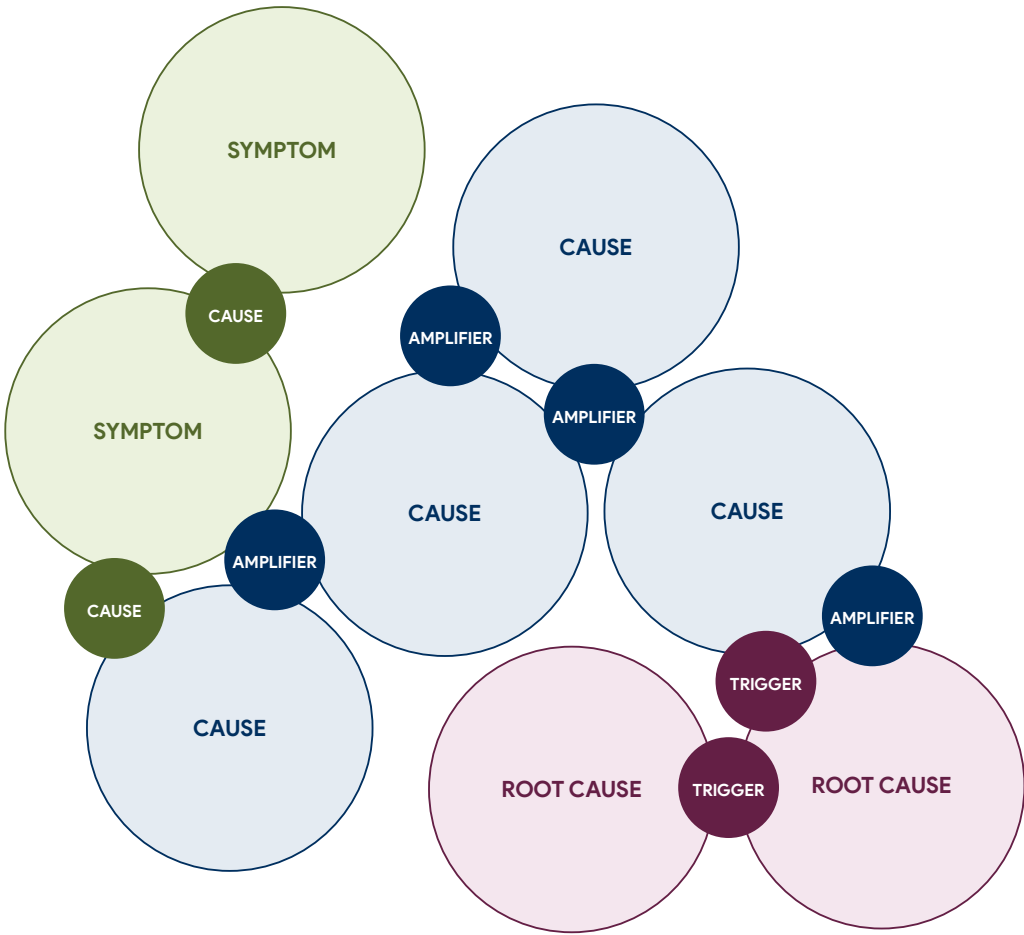
HMRC : SERVICE DESIGN :Service Blueprints

role
Senior Service Designer

methods
Process Mapping
Consolidation
Workshops

tools
Visio
InDesign
Illustrator

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Official Sensitive and cannot
be disclosed.

overview
HMRC held numerous disparate initiaves to map user journeys and internal processes, but no single consolidated reference.

objective
Rapidly (within a 2-week sprint) understand and map the end-to-end journey within the context of a problem statement, across all known actors and interfaces.

method
I was lucky within the programme to have immediate access to subject-matter-experts (SMEs) across the business, as such I held rapid, focused workshops to uncover the core concerns, issues and process pinch points, whilst also using all documentation made available to me by the SMEs and through various HMRC document repositories.

I consolidated the information into a sequential process flow, using a swimlane format for each identified user group, segmenting these further visually, where required, across the document. I then validated the maps with the SMEs and amend where appropriate.
I then overlaid all the identified issues across the blueprint.

Once a tax regime had been researched and drawn, I then consolidated to a macro-level view of how each regime operates (an asset that did not previously exist), with associated descriptions and known issues, for the business, technical and our Customers/users. This document was designed to be a single page interactive view to aid ease of consumption, navigation and whole-system understanding.

outcome
The service blueprints and eco-system documents are the central anchor for the programme across all stages, fully understanding the as-is environment in order to understand where to apply leverage to make effectice changes towards the programme objectives.

The work also enhanced the reputation and reliance of Service Design across other departments, leading to increased headcount and the inclusion of design in other scopes of work.
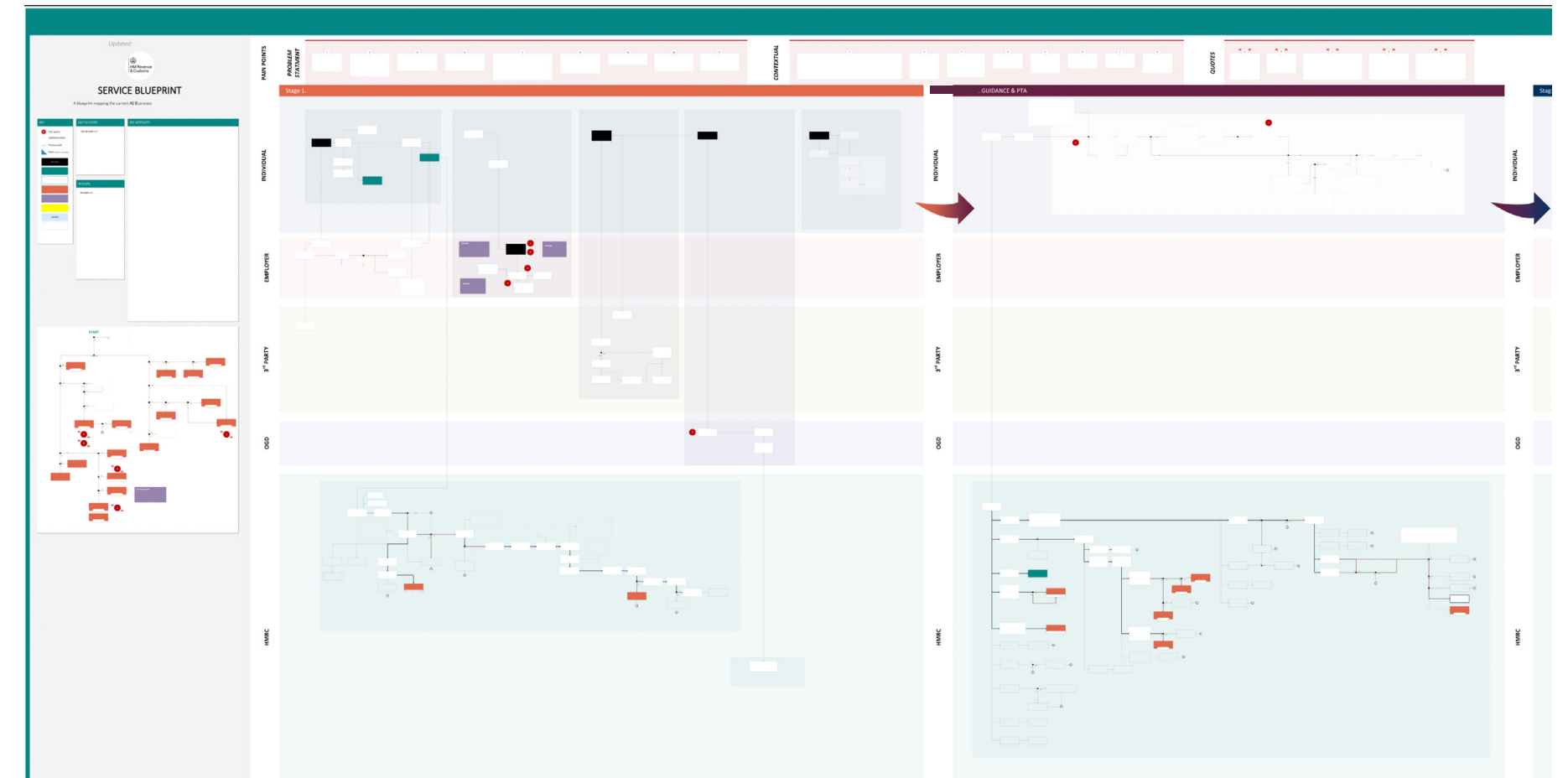

SERVICE BLUEPRINT
The linear user journeys and associated internal processes, guidance and external actors/actions were mapped to outline the context of a programme-specific problem statement. One was produced per Sprint over the year.

Details have been redacted

TAX REGIME ECO-SYSTEM
Findings and processes were brought into Illustrator and InDesign to create an interactive macro view of the eco-system, consolidating identified issues outside of the context of the Problem Statements and into a holistic view.
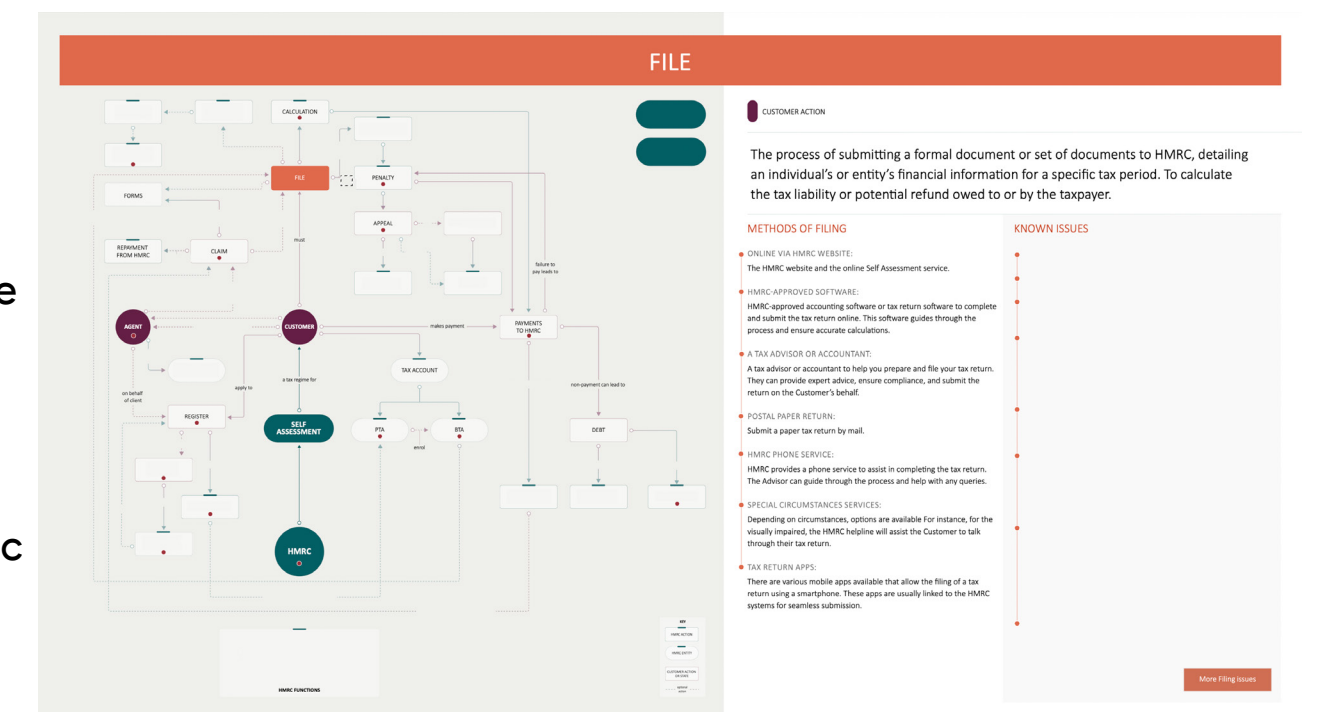
HMRC : DATA : **Workflow Tool**

role
Senior Service Designer

methods
Workflow design
Product Design
Development
Deployment & testing
Data visualisation

tools
Power BI
Power Automate
DAX / M language coding
Sketch
Premier Pro

The scope of this work is classed as Official Sensitive and cannot be disclosed.

overview
A new team with a high volume or rapid turnover work, needed a system to track and allocate work, display past work, and meaure performance against SLAs and other metrics.

objective
To design and build a system, a tool, that captured data and displayed it back with context and in aggregate format, within the closed HMRC software environment; with minimal friction on the team's ways of working.

method
I designed the system as the team were working out how to fulfil their remit. It became clear that we would be accumlating data rapidly, and the system could not only allocate new work & track where expertise was being built but could also display back consolidated views of previous work.

I taught myself PowerBI to display data, to Microsoft Associate standard, including learning to code in M language and DAX for data manipulation. I modelled the data, designed the workflow and product design including the UI, & built the schema. I included security and access protection, and connected data to the system, using PowerAutomate to automate updates and frictionless data transfer (such as from a single email mailbox), using SharePoint as the central respository. The result was a single application embedded into MS Teams as a seamless part of day to day work.

The uses of the sytem were socialised through a video I generated using Premier Pro.

outcome
The system was named 'Codex' and ran successfully for over a year and was central to the business case of new Data Analysis headcount within the team, and providing an additional data dashboard to the department leadership group.
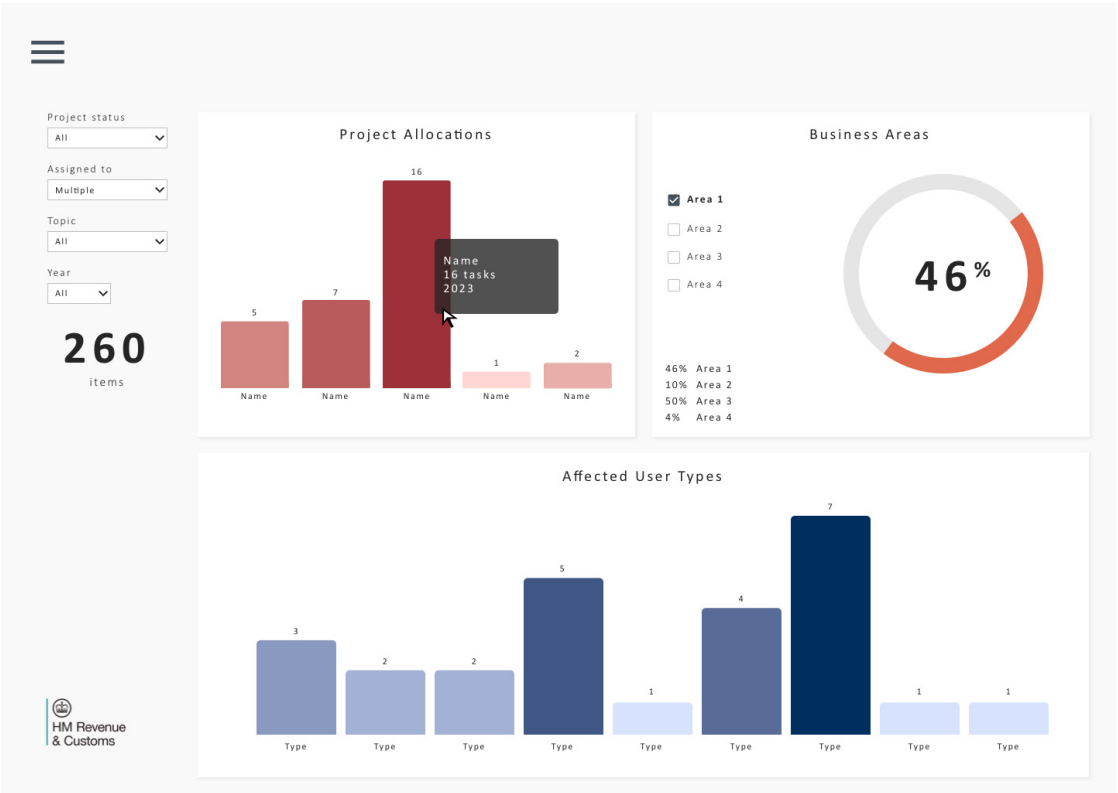
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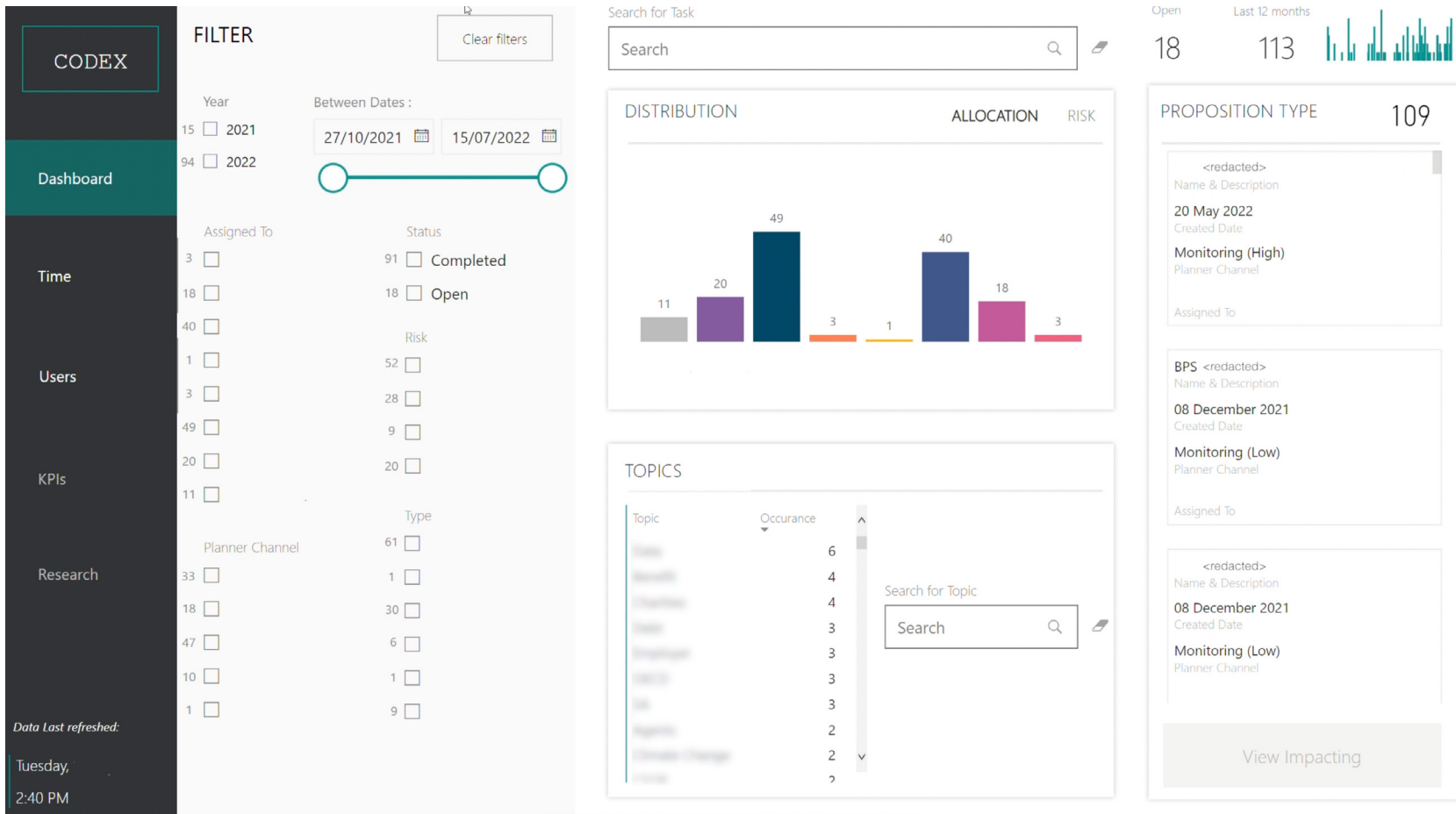
CODEX
A PowerBi, SharePoint hosted end to end system, using the Microsoft Product suite to track work, build expertise and measure performance

CODEX 2.0
While the continuous development of the system was delegated to a Data Analysis team, I retained the responsibility for the workflow and user interface design.

HMRC : SERVICE DESIGN : **Gamification**

role
Senior Service Designer

methods
Research | Analysis
Data visualisation
Game Design

tools
Sketch
PowerPoint
Visual Basic code

The scope of this work is classed as Official Sensitive and cannot be disclosed.

overview

A long term project into new ways of working in the UK economy had run over 3 years, resulting in a huge amount of research output and core findings affecting the user groups.

objective

To create an immersive empathic experience for stakeholders to 'walk in the shoes' of our identified personas, and to demonstrate various working practices within the uk economy and how these affect everyday life.

method

I designed a dice-based board game, where players played as one of the 3 core personas. As they progress around the board, they might land on an opportunity to work and earn money. They might land on everyday life events (such as car breakdowns, holidays, bills, and trips to the hospital), that could cost them money, or they might land on an embedded piece of user research insight. Board circuits are completed through a series of mini-games, life events and taxation-related policy objectives, all built into the gameplay.
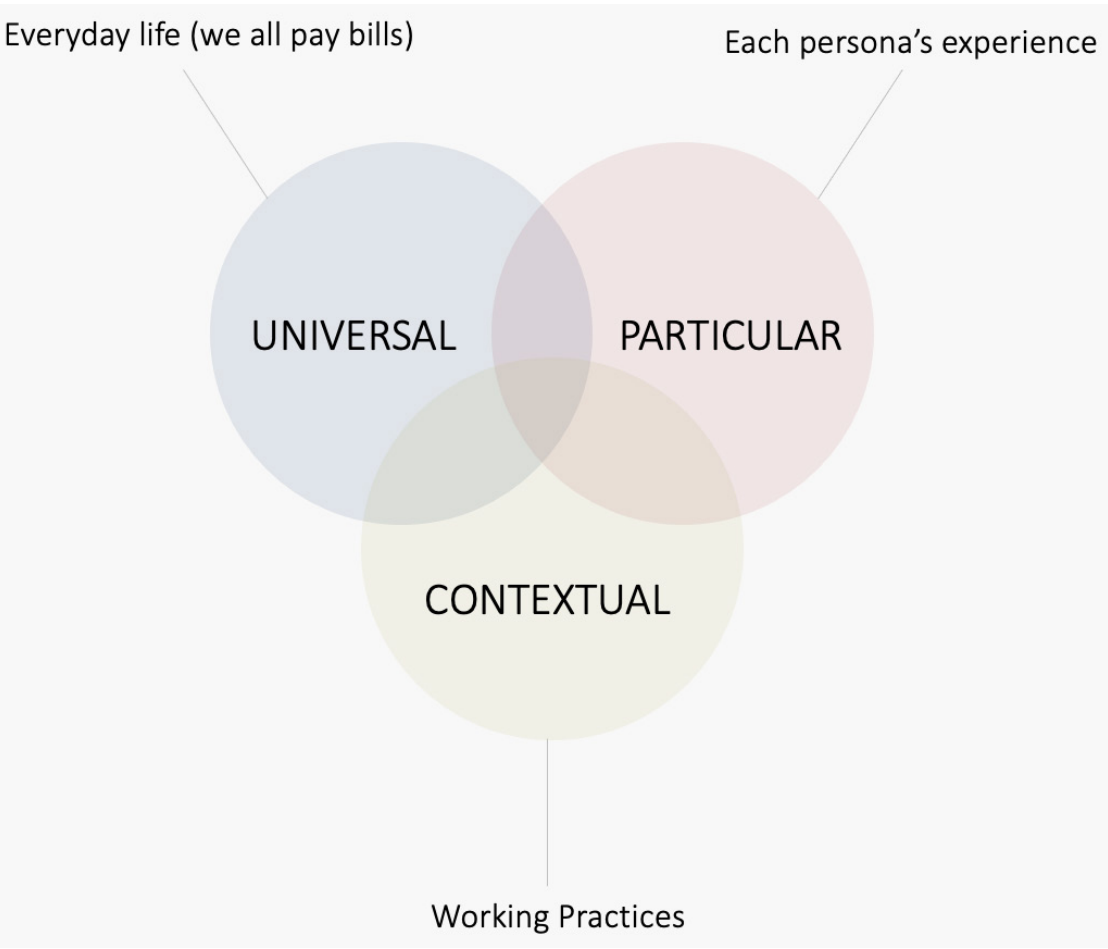
The aim of the game is to earn £1000, (the persona identified in research always wins).

During Lockdown, the game was moved to an online experience via powerpoint (complete with random dice rolls) and can be played on a Microsoft Teams call. It takes no longer than an hour.

outcome

The game changed the outlook of many key stakeholders, and was instrumental in diverting the policy objectives towards a flexible approach that encompassed a wider baseline of considerations than originally defined, whilst retaining policy intent.

Details cannot be shown due to Official Sensitive status of the work

Everyday life (we all pay bills)   Each persona's experience

UNIVERSAL   PARTICULAR

CONTEXTUAL

Working Practices

BOARD GAME
A board game that embedded 3 years of design research and user insight into the empathic experience.

BILLS
Roll the dice
to find the bills
Lucky double : the bill is already paid!

roll		pay
1 – Gas		£50
2 – Electricity		£50
3 – Water		£20
4 – Broadband		£20
5 – Council Tax		£50
6 - Mobile		£10

Competitive on price
SKILLS - PRICE

Win the gig
by rolling the
lowest score

Income is **£50**

ONLINE VERSION
Due to lockdown, the game moved online using a set of powerpoint files, random dice rolls, and a tracking google spreadsheet to calculate scores.

JOKER

Only to be used if the Player holds insufficient cash reserves to meet a commitment.
Wipes any outstanding bill.

When passing START:

Collect £100*
Remove housing costs
Miss ONE turn

*minimum income floor

RISKS & REWARDS
*"I'm old school!
I've had receipts stuck on the spare fridge"*

Financial management is still a paper process for many

Miss : **1 turn**

HMRC : SERVICE DESIGN : **Policy Design**

role
Senior Service Designer

methods
Research | Analysis
Service blueprints
User journeys

tools
Sketch
MS Office
Mural | Miro
Google Workspace

overview
Policy Lab in HMRC stress tests policy initiatives for impacts and unintended consequences for HMRC Customers.
Using a User centric approach, policy ideas are also co-created with users and stakeholders to achieve policy intent.

objective
Projects within Policy Lab are varied in timescale and scope, across all areas of taxation and HMRC involvement. This case study is relevant to a Consultation 'VAT Treatment of Fund Management' (PUBLIC CONSULTATION RESPONSES DECEMBER 2022).

method
We undertook direct user research, and internal research into processes and systems at play. I mapped these into service blueprint format, and overlaid user pain points, and potential areas of change. We also looked to the international landscape and vsualised comparisons with the UK across several publically available metrics.
I researched relevant Case Law and mapped a sequence of connected, relevant cases and their impacts on existing policy and law.
The whole project was within 4 months and required rapid examination and distillation of complex financial domains.

outcome
The research and visualisations provided our Treasury stakeholders with a richer picture of the eco-systems, environments and experiences of VAT in Fund Management, enabling considerate and wide-reaching policy initiatives and qualifying much of the Consultation responses into significant context.

CASE LAW SUMMARY
A visualisation that showed the progression, connections and impacts of UK (and relevant EU) Case Law for the policy domain.
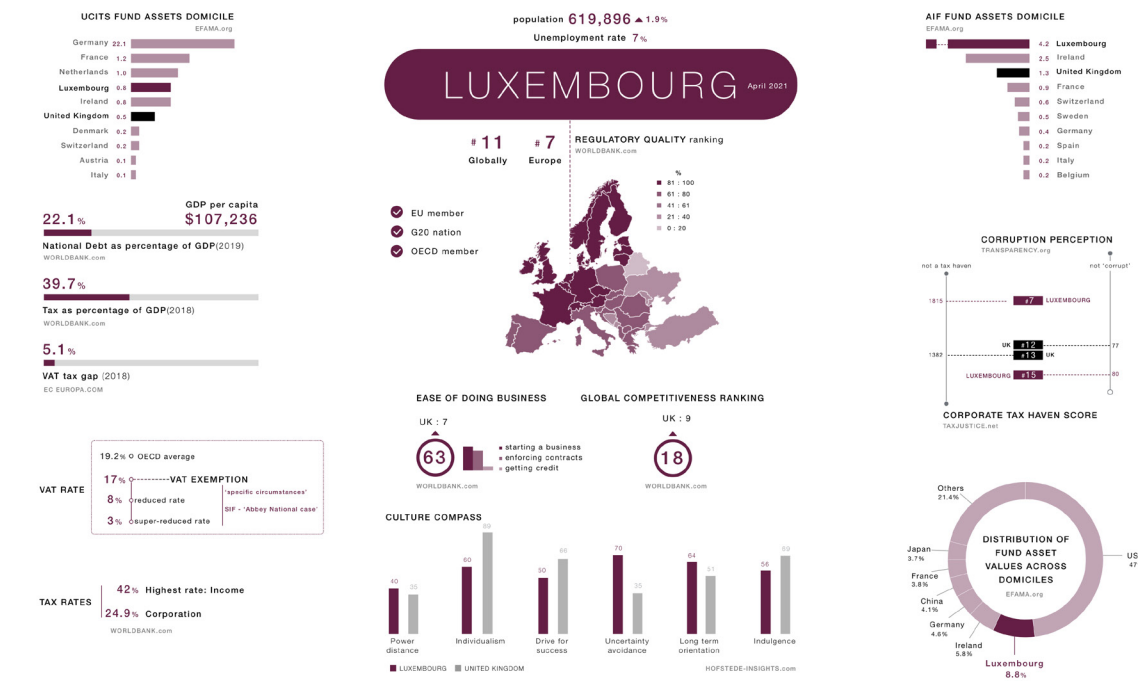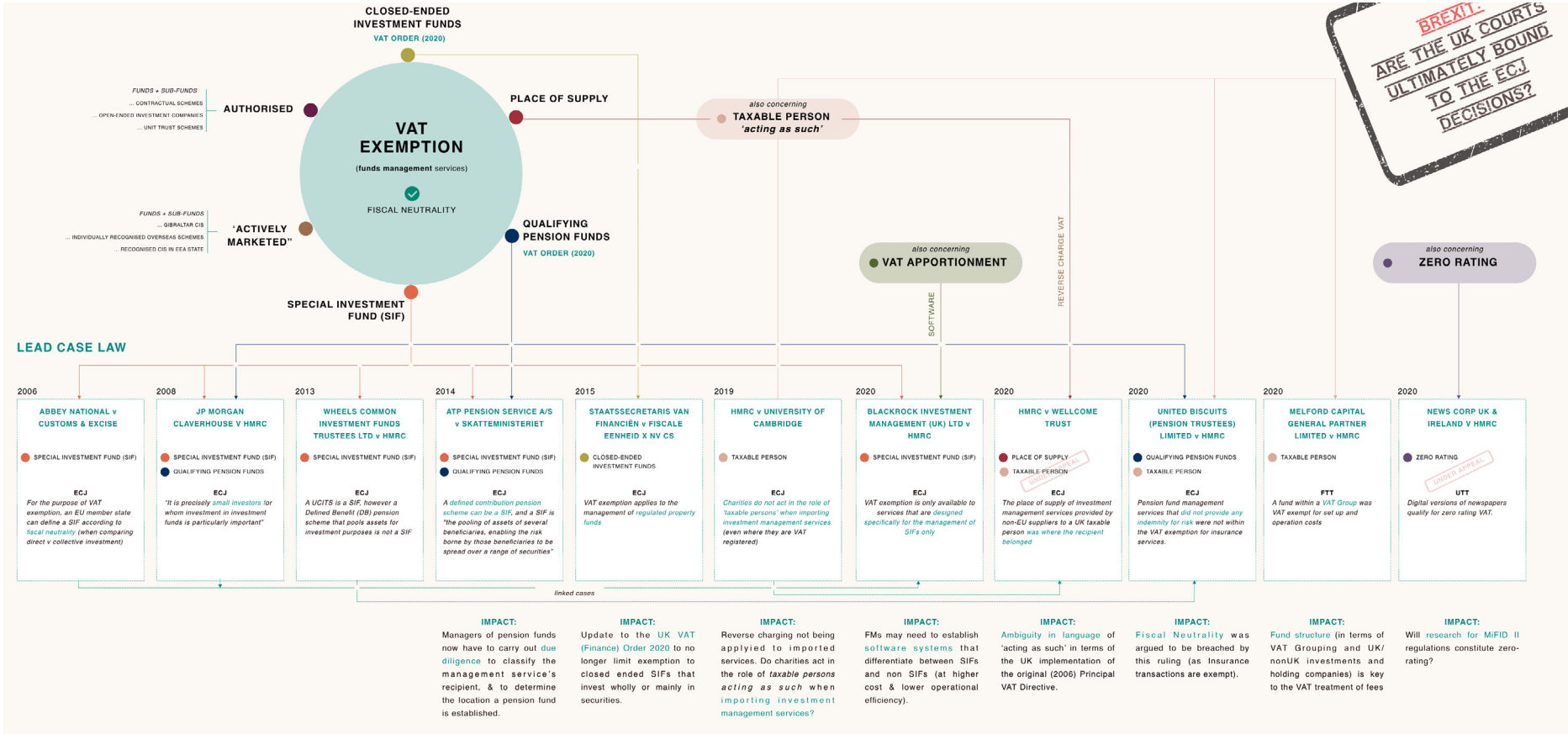
INTERNATIONAL COMPARISONS
A country-by-country comparison of the UK fiscal domain with key selected alternative regimes.

N&S : DESIGN OPERATIONS : Design System

role
Head of design operations
Engagement lead

methods
User journeys
Wireframes
Interface design
Repository design
Process design

tools
Sketch
InVision
Axure

overview
Our client (Tungsten Network) was in need of an interface design for their internal portal managing global invoicing.

objective
To empower our client to design and build consistent, world class applications from a common code base.

method
Although initially contracted to design a single application, it became apparent that to serve our client best, we should furnish them with a scalable, manageable system that could be rolled out across other applications within their remit (they have several separate systems, globally).

We designed the system from an interaction, experience, and interface perspective. We also designed and implemented a modifiable code repository connected to visual assets, thereby streamlining the product management process for our client.

All assets were stress tested with the design of 2 separate applications for the client, as built by their in-house team, using our library.

outcome
The generation of a design system enabled and empowered our client to self-manage the branded, consistent design of their whole range of separate & connected applications. This continues to be rolled out across their applications globally.

DESIGN SYSTEM BOOKLET
We provided a printed book of the system, containing components specifications, layout & responsive guidelines, UX checklist, components, and templates. This booklet was provided in addition to the core assets and repository.
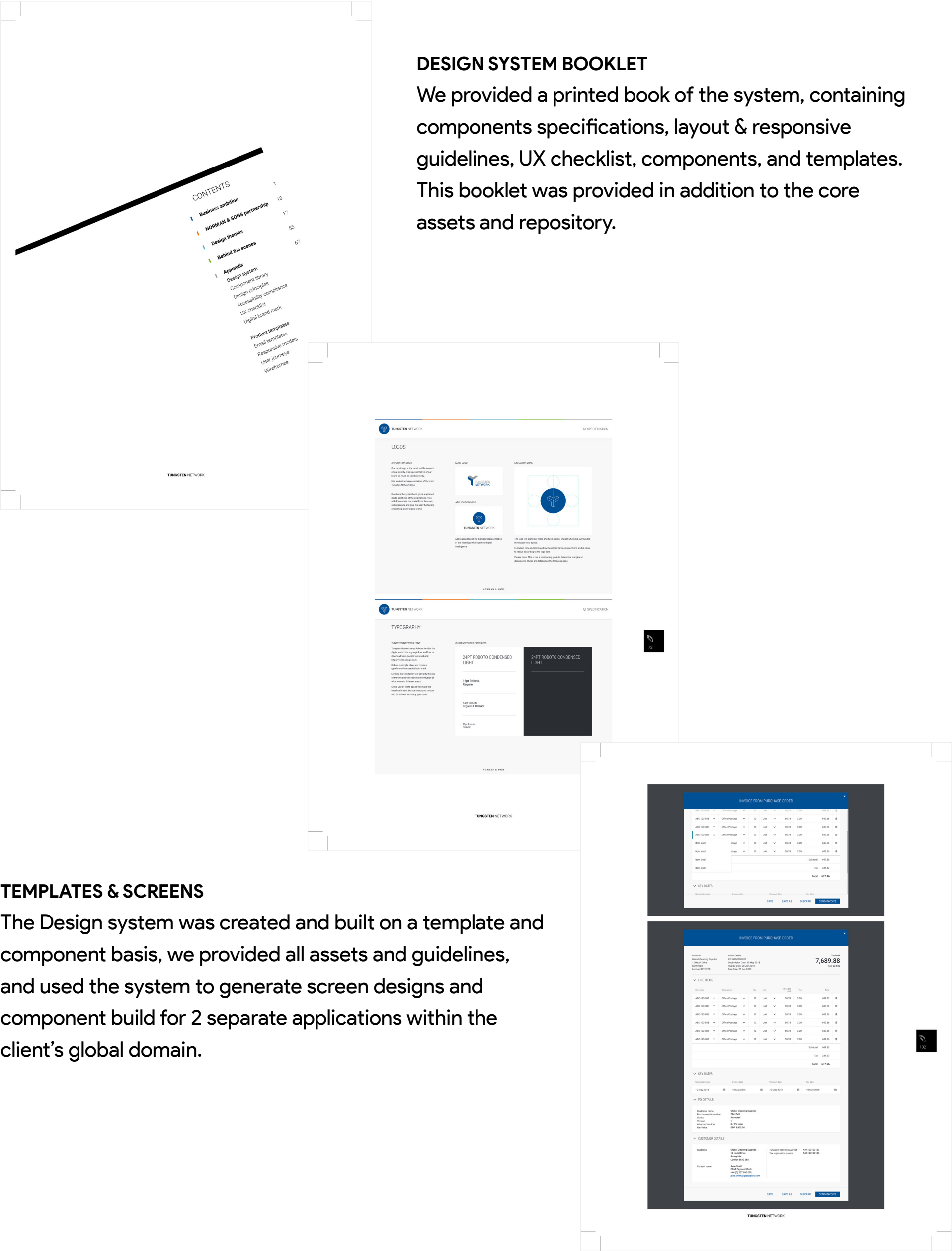
TEMPLATES & SCREENS
The Design system was created and built on a template and component basis, we provided all assets and guidelines, and used the system to generate screen designs and component build for 2 separate applications within the client's global domain.

HSBC : UX / INTERACTION DESIGN : **Digital Transformation**

role

Lead Designer

methods

User journeys
Wireframes
Stakeholder liaison

tools

Sketch
Illustrator
Axure

overview

HSBC was undertaking a large scale, global Digital Transformation within the GLCM (Global Liquidity and Cash Management) department. I was brought into ensure a consistent design approach to the programme.

objective

I moved into a dual role at HSBC.
I held responsibility for the design for the Entitlements /Permissions application and the integration of payments and mobile for the ongoing digital Transformation programme.

I also was the Lead for the concurrent redesign of the business banking products globally, and region-specific initiatives such as Trade Tracker (an import:export supply chain management tool) and Fusion, a hybrid retail & commercial banking product.

method

Due to the scale of my remit, I managed my time and work closely. I ensured that the teams within my responsibility were empowered to efficiently meet their deadlines to a common high quality standard.

I also established a template-based design system, to enable the rapid concurrent design and efficient build of multiple products within HSBC.

outcome

The Digital Transformation was a huge undertaking, with a massive design team across mutliple external agencies and in-house teams. The design programme completed far ahead of the delivery rollout which continues to this day.

HSBCNET DIGITAL TRANSFORMATION
A global approach to the Digital Transformation of HSBCNet.
Template driven approach, Payments, Entitlements and mobile integration
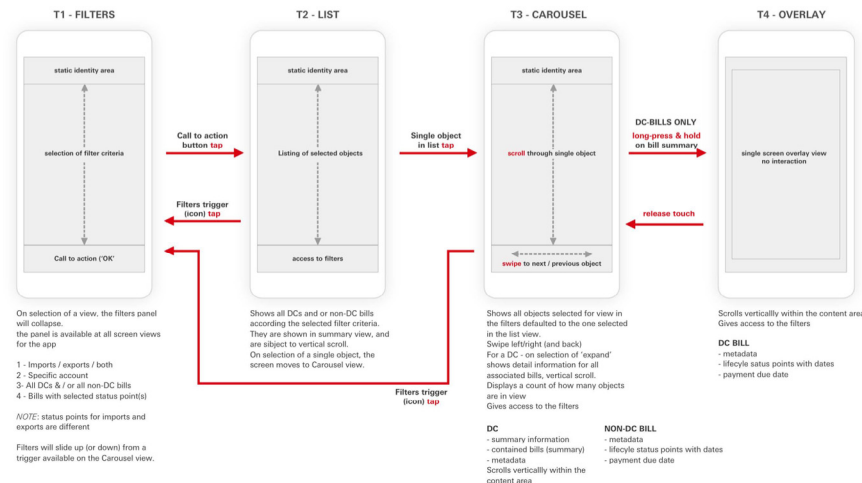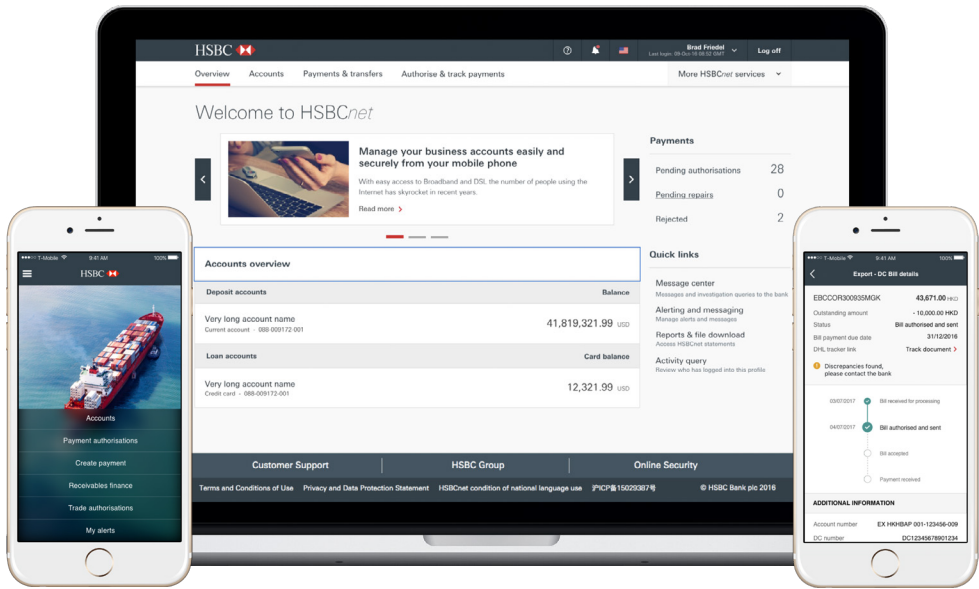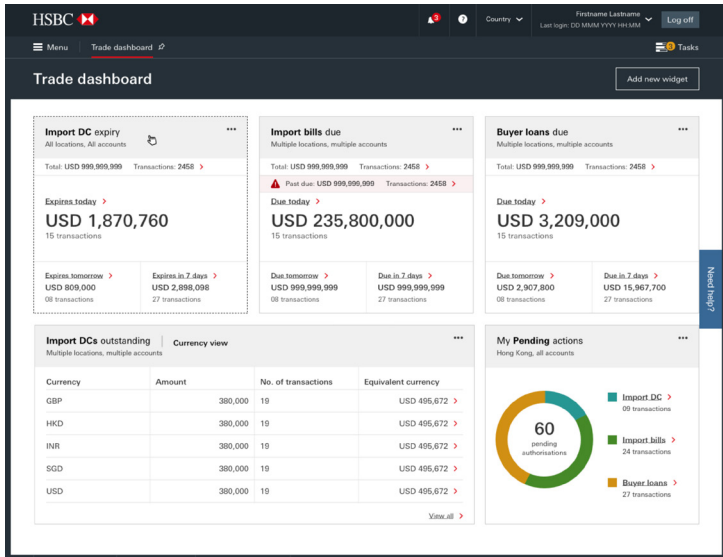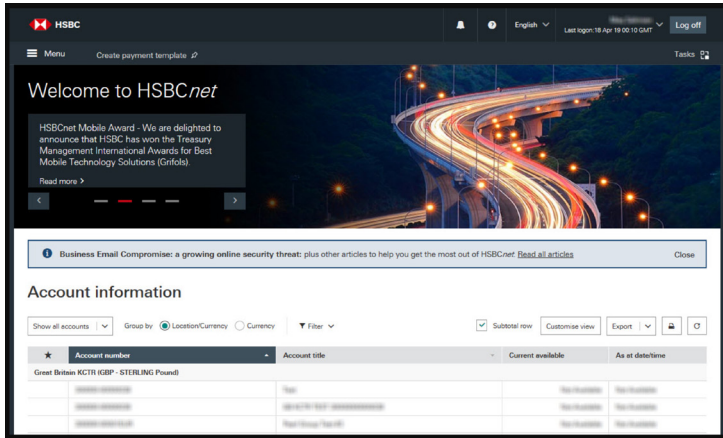
BUSINESS BANKING DIGITAL TRANSFORMATION
Design of a new 'Fusion' product for SME Customers.
Mobile integration.

TRADE TRACKER
A Hong Kong based import:export tracker for the HSBC global supply chain, seamlessly connected to the HSBCNet web design.

HSBC : UX / INTERACTION DESIGN : Application Portal

role
Lead Designer

methods
User Research
User journeys
Wireframes
Stakeholder liaison

tools
Illustrator

overview
HSBC Securities Services held a number of separate applications that held common data and user groups. The UI was outdated and call centre help requests was a significant cost to the department due to insuffiencient usability of the apps.

objective
To consolidate the applications into a single 'portal' via Single Sign On (SSO), collaborating with the design of a single interface and UX design system.

method
Managing a small team, I worked incrementally, ensuring we were an embedded unit within the BAU delivery cycle.
Direct user research was at a premium within HSBC, and so we also mined the call centre help logs to identify common issues and key requirements.

Then working incrementally, we designed to an Agile method, using an MVP approach, application by application with a single core framework and layout rules.
I worked closely with the business and the development team in Hong Kong to gain the most effect within the release cycles.

outcome
The work significantly reduced user support calls, and was instrumental in the business acceptance of a need to re-design multiple services to a new brand and UX standard - as part of the HSBCNet Digital Transformation. The application suite also won The Banker award for '*Best Use of Data*' in 2014.

TRADE LIFECYCLE
Establishing a language system of nouns and verbs to clearly differentiate between the action required (the verb) and the trade status (noun)
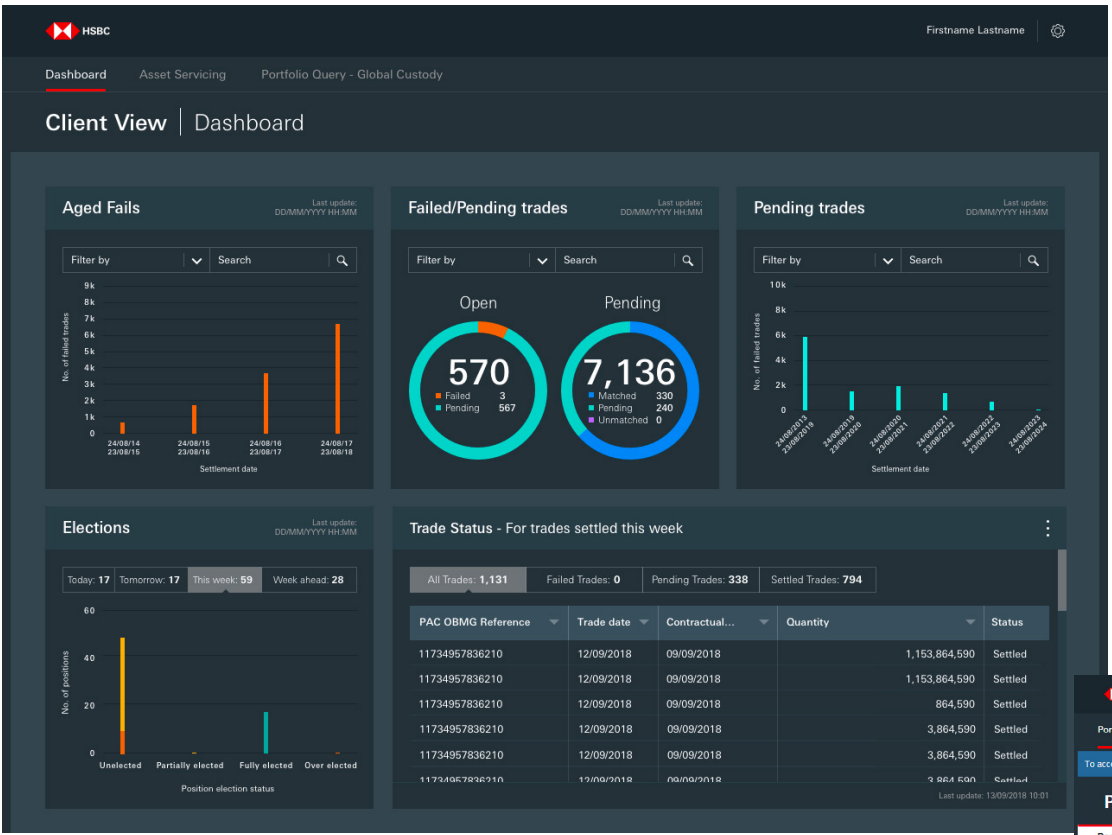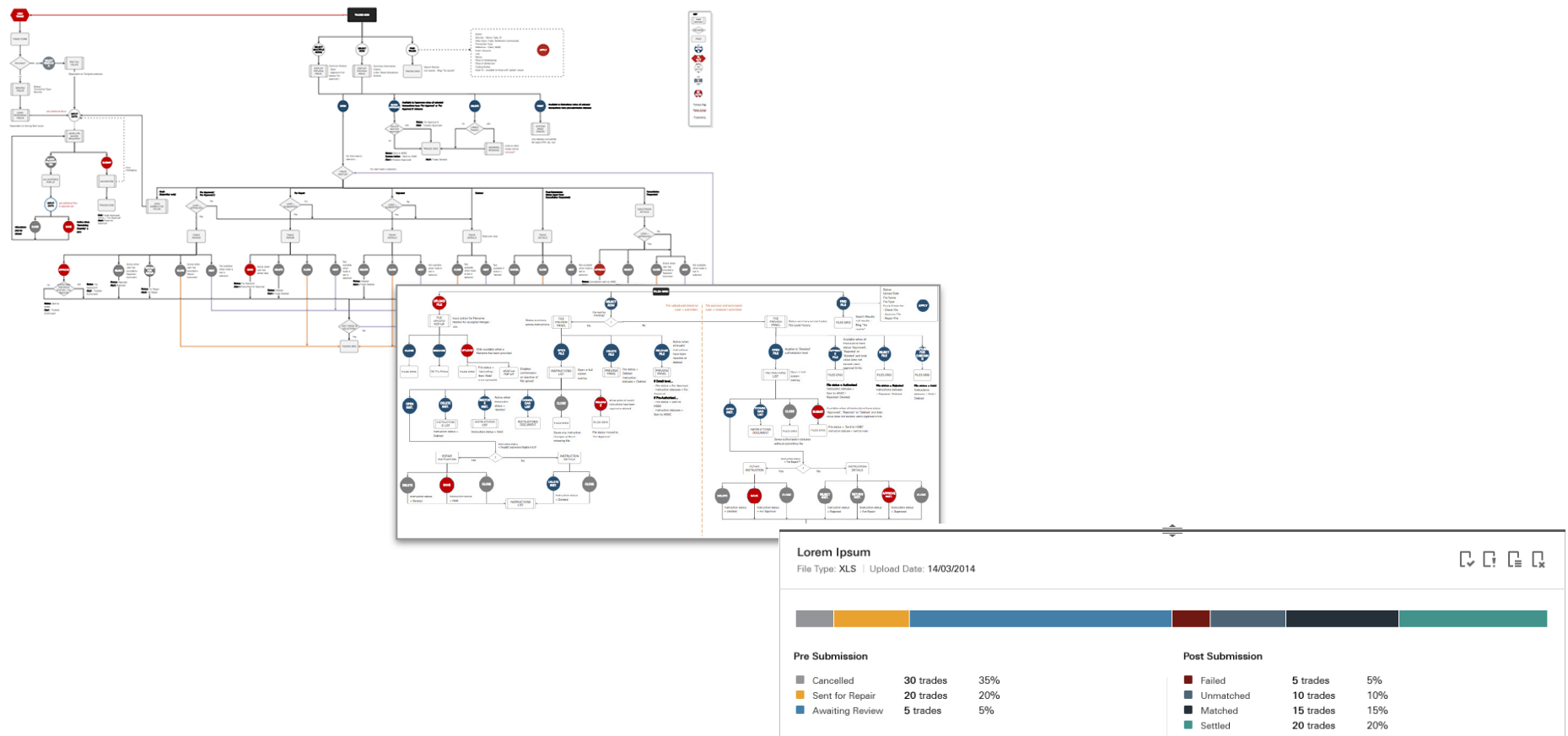
'CLIENT VIEW
A consolidated portal for all fund, custody and trade management within HSBC Investment Funds:
Custody
Corporate Actions
Reporting
Asset | Portfolio Management
Transfer Agency
Trade Lifecycle