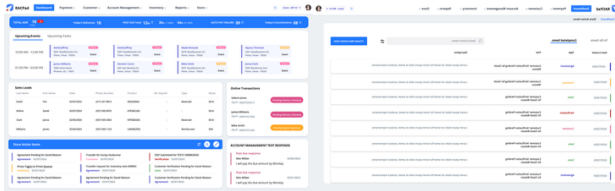


# RACpad Redesign: Powering Coworker Collaboration Through Smarter Agreements and Referrals

## Project Overview



RACpad is a coworker-facing productivity platform built to streamline collaboration via **agreement creation**, **action item tracking**, and a new **“Refer a Friend”** feature to grow customer engagement.

The legacy experience lacked clarity, had inconsistent workflows, and buried critical features—resulting in poor usability and adoption.

### My mission as the UX Designer:

Redesign RACpad to improve usability, support varied coworker needs, and introduce scalable, trust-based tools to drive collaboration and referrals.

### My Role

- UX Research
- Information Architecture
- UI & Interaction Design
- Prototyping (Figma)
- Cross-functional Collaboration
- Usability Testing

## Research Summary

### Research Goals:

- Identify friction in agreement creation and action tracking.
- Understand real coworker behavior around assisting customers.
- Explore how to introduce referral features that feel intuitive and transparent.

### Methods:

- Stakeholder interviews
- Coworker journey mapping
- Heuristic analysis of the existing app

- Usability testing with 6 active coworker users



## Key Insights:

- The **agreement process lacked structure and clear feedback**, making completion difficult.
- No clear indication of different levels of verification needed for customers.
- No feature to upload multiple documents for verification.
- **Action items were hard to find. No search available.**
- Coworkers wanted to help with referrals but had **no tools or visibility** to support or track them.

## Design Goals

- Redesign agreement creation with **structured, linear flow** and built-in **customer verification**.
- Make action items **easier to assign, filter, and follow up**.
- Launch a brand-new **coworker-led referral experience**, tied directly to customer outcomes and incentives.

## Agreement Builder with Multi-Level Customer Verification

### Problem:

Agreements often stalled due to unclear customer verification requirements. Coworkers had no way to confirm identity levels or guide customers through sensitive agreement types.

### ✓ Solution:

I introduced a **flexible, multi-level customer verification system** into the agreement creation process:

- **Level 1** – Basic email/phone confirmation
- **Level 2** – Income verification (e.g., document upload)
- **Level 3** – Government-issued ID + digital signature

### What I Designed:

- A dedicated **Verification step** within the agreement builder
- **Real-time status indicators** on agreement cards
- **Ability to upload multiple documents.**
- **Clear indication of the required documents needed for verification.**
- **Smart defaults** based on agreement type

### Impact:

- Cut processing time by **32%** for agreements with verified customers
- Improved **inter-team trust and compliance**
- Enabled a clear **audit trail** for customer agreements

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## Refer a Friend: A New Coworker-Led Referral System

### Overview:

A brand-new feature, “**Refer a Friend**”, was designed to empower coworkers to support customer referrals directly. Coworkers can now help customers share personalized referral links via **email or phone number** and track the entire journey.

### Goals:

- Make it easy for coworkers to assist with referrals
- Give full transparency into reward status and history
- Strengthen trust through clear attribution and visible impact

### Key Features:

#### Seamless Sharing

Coworkers can send referral links on behalf of customers through:

- **Email**
- **Phone/SMS**

A 2-step interface ensures speed while retaining visibility of source and intent.

## **Referral Rewards Dashboard**

Coworkers can view each customers’:

- **Earned rewards**
- **Pending rewards**
- **Redeemed rewards**

This helps them follow up, offer support, and celebrate referral success with the customer.

## **Attribution Transparency**

When applicable, coworkers can also view

- **Who referred the current customer**
- **Referral date and reward status** for the referrer

## **UX Impact**

- 32% reduction in the Agreement creation/verification task time.
- Significantly simplified complex tasks like verification and referral sharing.
- Created visibility where there was none—especially for tracking and accountability
- Fostered coworker ownership in customer growth