

Mitch Hazam

User Experience Leader and Product Strategist

DesignOps, User Experience (UX), Information Architecture (IA), User Interface Design (UI), Data Visualization, User Centered Design, Design Thinking, Product Strategy, Interaction Design, Web and Mobile Application Design, Voice UX, AI Design, UX Research, Usability Testing, Branding and Identity, Design Requirements Documentation, Search Engine Optimization (SEO), Brand Strategy, Product Marketing, Social Marketing Strategy, CSM Certified, Agile, Lean UX, Accessibility / ADA standards

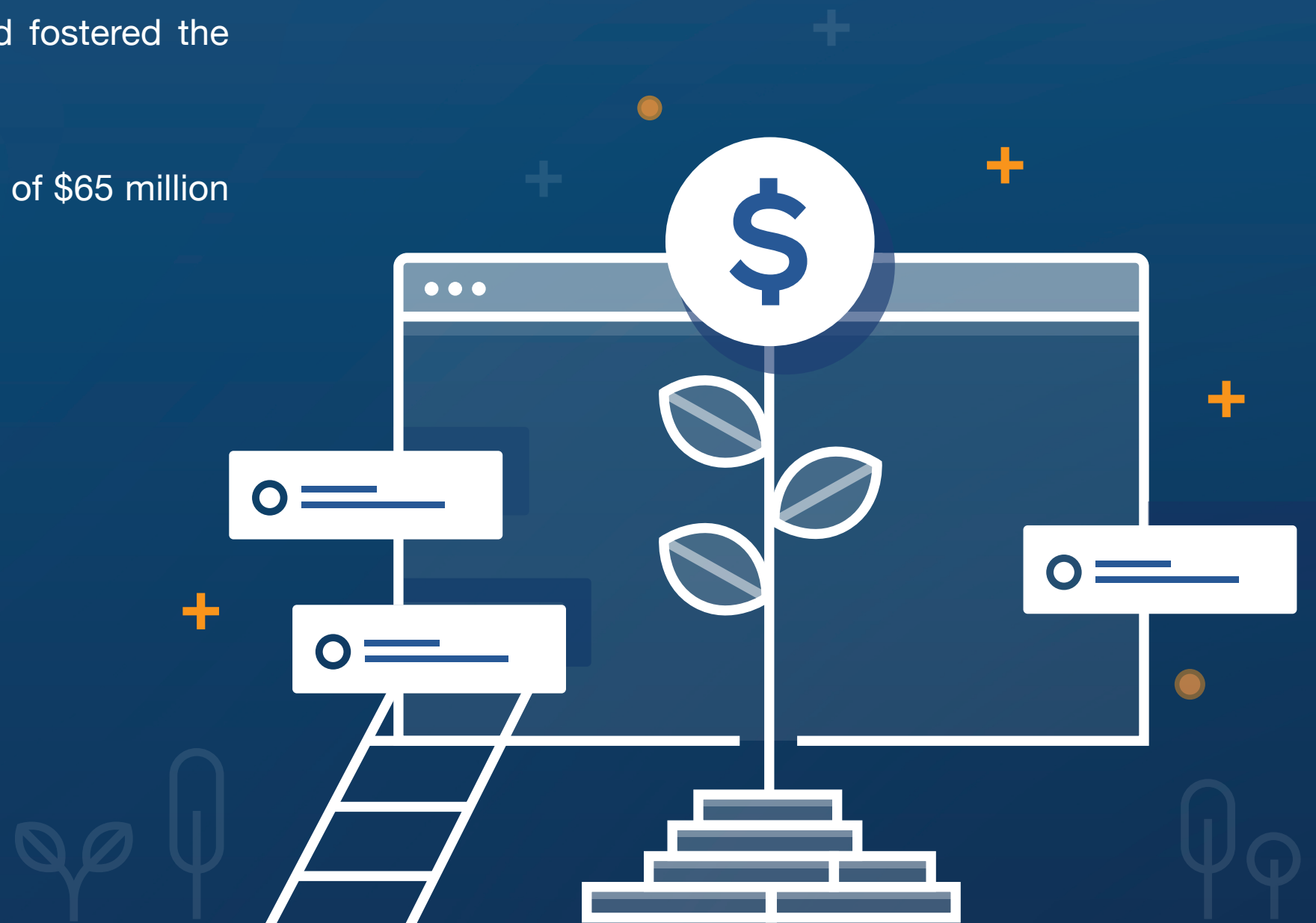
Navy Federal Digital Investor

Navy Federal embarked on re-platforming their Digital Investment product and adding a Robo investing feature. The team of one UX designer, one visual designer and one UX writer, worked with a third party development team and the internal stakeholders. I lead the team through the product strategy, design and fostered the relationship with the stakeholders.

Upon the release of the redesigned platform, a total of \$65 million has been invested with 17 thousand users.

Project: Navy Federal Digital Investor (NFIS)
Role: Head of UX and Design
Skills: Design Leadership, Product Strategy, Accessibility

www.navyfederaldigitalinvestor.com/



Wireframes

NavyFederal.org

Sign In

Digital Investing Tool

Digital InvestingManaged AccountsSelf-Directed InvestingCompare PlansFAQsResources

No matter your investing experience, our digital investing tool can help reach your financial goals.

Choose from two ways to invest.

Learn More

Sign In

DIGITAL INVESTING

How would you like to invest?

X

Invest for me

Our digital advisor will build a portfolio tailored to your financial goals.

X

I'll choose my own investments

Take control of your own portfolio with self-directed investing. Choose from over 1,000 stocks and invest on your terms.

X

I'm not sure

Need help deciding where to begin? Compare our solutions side by side.

MANAGED ACCOUNTS

What are Managed Accounts?

Investing is simple with help from our digital advisor. You tell us about your goal and investing preferences, and our digital advisor builds a portfolio tailored to you. You can always update your portfolio and make adjustments on your own.

Choose Your Goals

Personalized Portfolios

Automatic Rebalancing

Open Managed Account

SELF-DIRECTED INVESTING

NAVY FEDERAL FINANCIAL GROUP

Digital Investing Tool

No matter your investing experience, our digital investing tool can help reach your financial goals.

Choose from two ways to invest.

Learn More

Sign In

Digital Investing

How would you like to invest?

X

Invest for me

X

I'll choose my own investments

I'm not sure

MANAGED ACCOUNTS

SELF-DIRECTED

COMPARE DIGITAL INVESTING PLANS

X

Self-Directed Investing

X

Managed Accounts

My InvestmentsBrowse InvestmentsTransferTransaction HistoryEducation

CartNotificationsAccount

S & P 500\$2,961.06▲+\$19.30 (.66%)DOW\$26,715.18▼-\$90.96 (.34%)NASDAQ\$8,082.81▲+\$76.56 (.96%)

GOOD AFTERNOON, KATE

Market information as of 1:31 p.m. EDT July 7, 2019

Market Value of Investments

\$2,432.61

▼-\$73.45 (.07%)

DayWeekMonthYear

Compare to

Select Index

Self-Directed Investments

Managed Investments

Individual Account

64752489

Today's Gain/Loss

\$2,432.61

▼-\$73.45 (.07%)

Managed Investment accounts

provide lorem ipsum dolor sit amet, consectetur adipiscing

Open Managed Account

Watchlist Market Movers

TSLA

▼-\$20.12

AMZN

▼-\$2.17

DIS

▼-\$1.22

ADD

View All

Menu

S & P 500▲DOW▼NASDAQ▲

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Self-Directed Investments

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Managed Investments

Managed Investment accounts provide lorem ipsum dolor sit amet, consectetur adipiscing

Open Managed Account

Watch List Market Movers

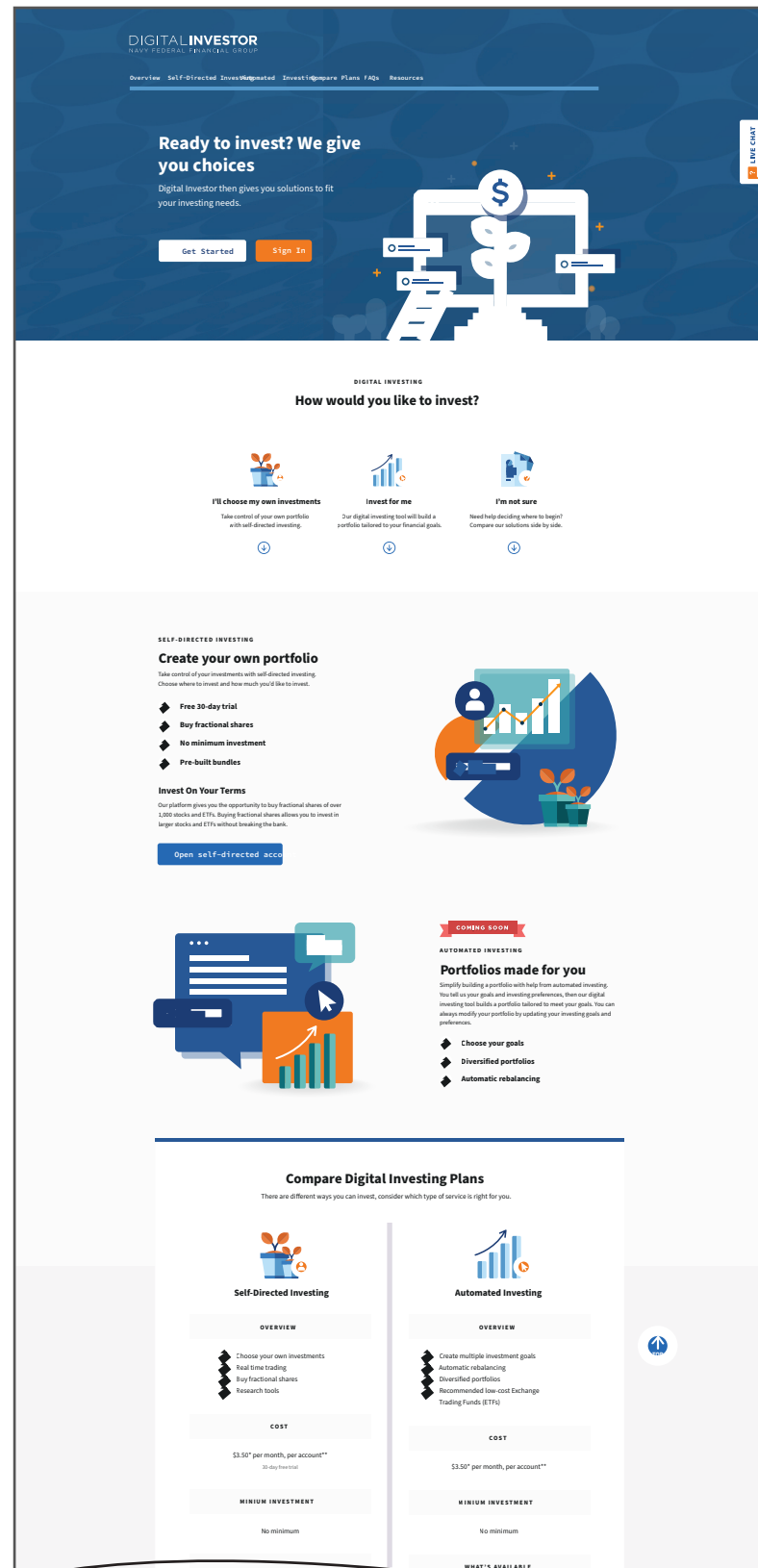
TSLA

▼-\$20.12

AMZN

▼-\$2.17

Production Site



DIGITAL INVESTOR
NAVY FEDERAL FINANCIAL GROUP

No matter your experience,
our digital investing tool can
help reach your financial goals.

Choose how you invest.

[Learn More](#)

[Sign In](#)

DIGITAL INVESTING

How would you like to invest?

Invest for me

↓

I'll choose my own investments

↓

[I'm not sure](#)

SELF-DIRECTED INVESTING

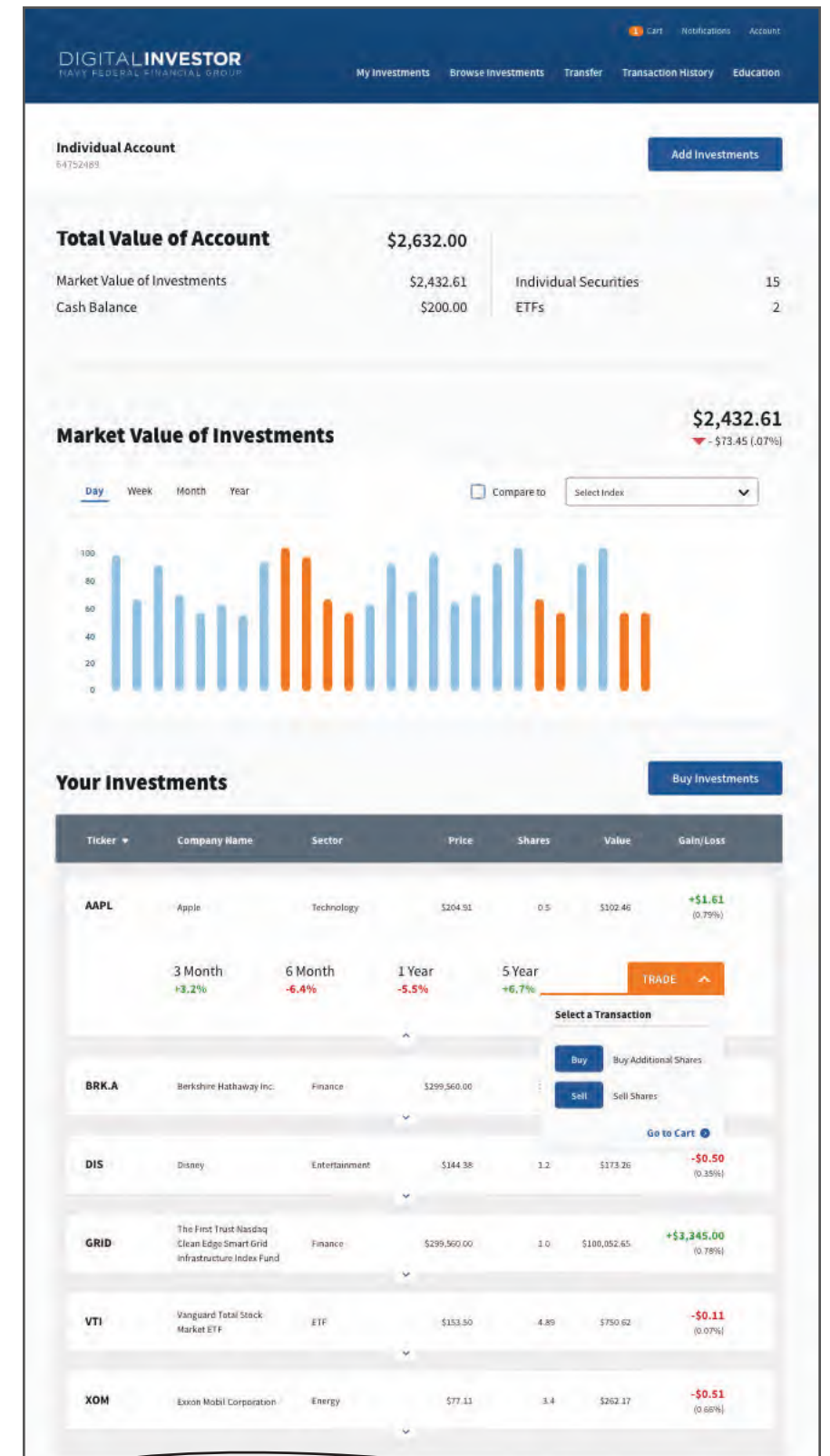
AUTOMATED INVESTING

What is Automated Investing?

Investing is simple with help from our digital investing tool. You tell us your goals and investing preferences, then our digital investing tool builds a portfolio tailored to you. You can always update your portfolio and make adjustments on your own.

- ◆ Choose Your Goals
- ◆ Personalized Portfolios
- ◆ Automatic Rebalancing

COMING SOON



Conversational Banking Concept

Through the emergence of AI, the correlation between consumer banking and voice appliances, such as the Amazon Echo, was examined. This research analyzed the interactions between a member of Navy Federal Credit Union and the Amazon Echo, focusing on the approach of a call and response paradigm.

I focused on how our core banking system could leverage this AI platform while maintaining a paradigm consistent with the physical applications. This has remained in research and development with a physical prototype being developed for user testing.

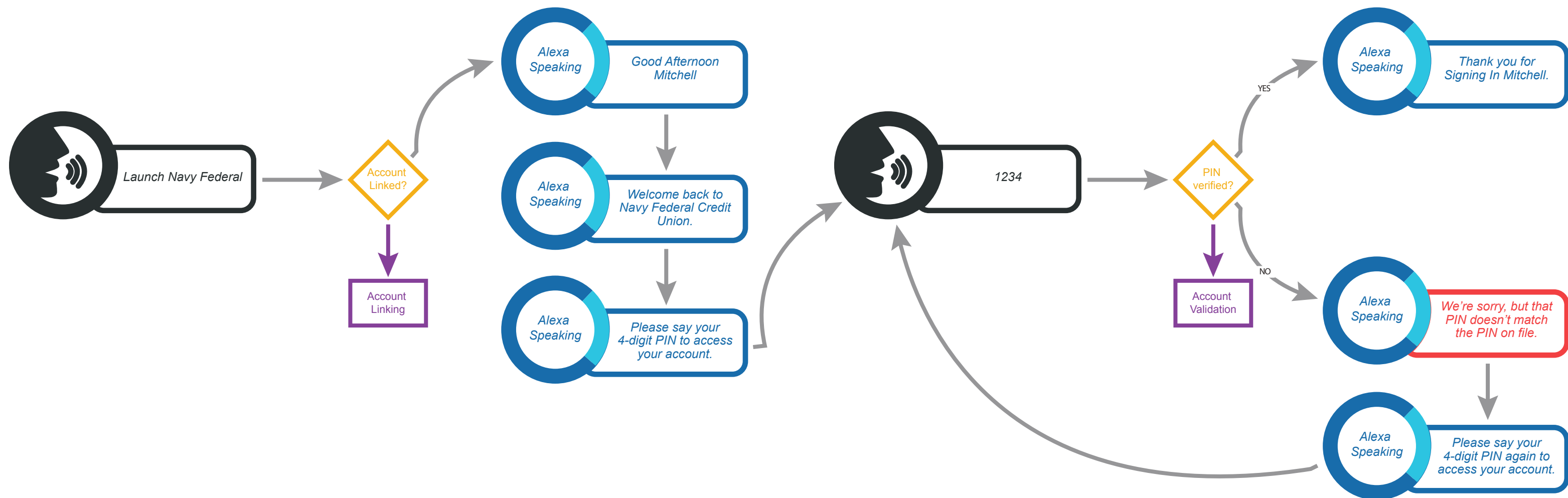
Project: Conversational Banking - Amazon Echo

Role: Head of UX and Design / UX Designer

Skills: Product Strategy, R&D, Writing



Authentication

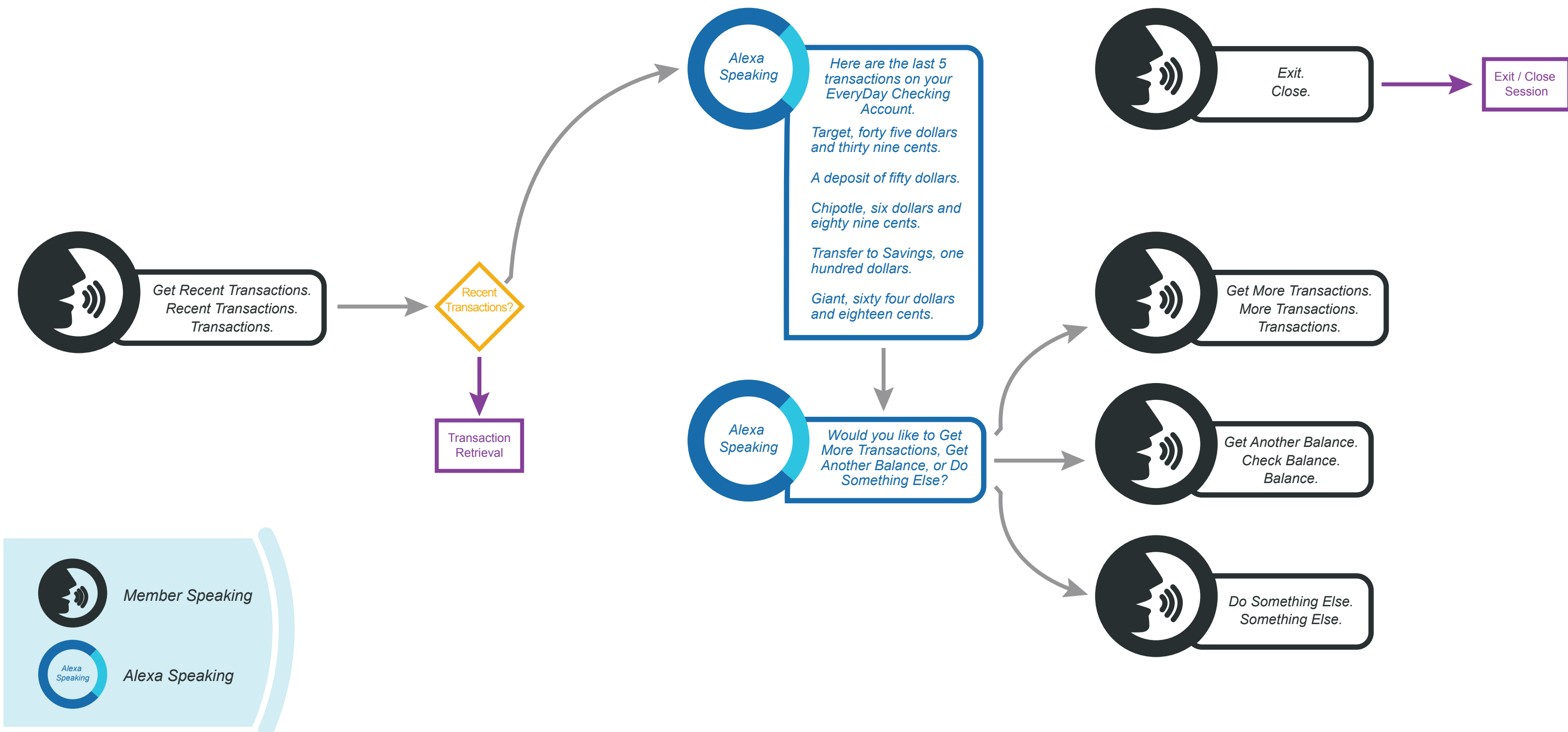


Member Speaking



Alexa Speaking

Resent Transactions



Safe To Save Concept

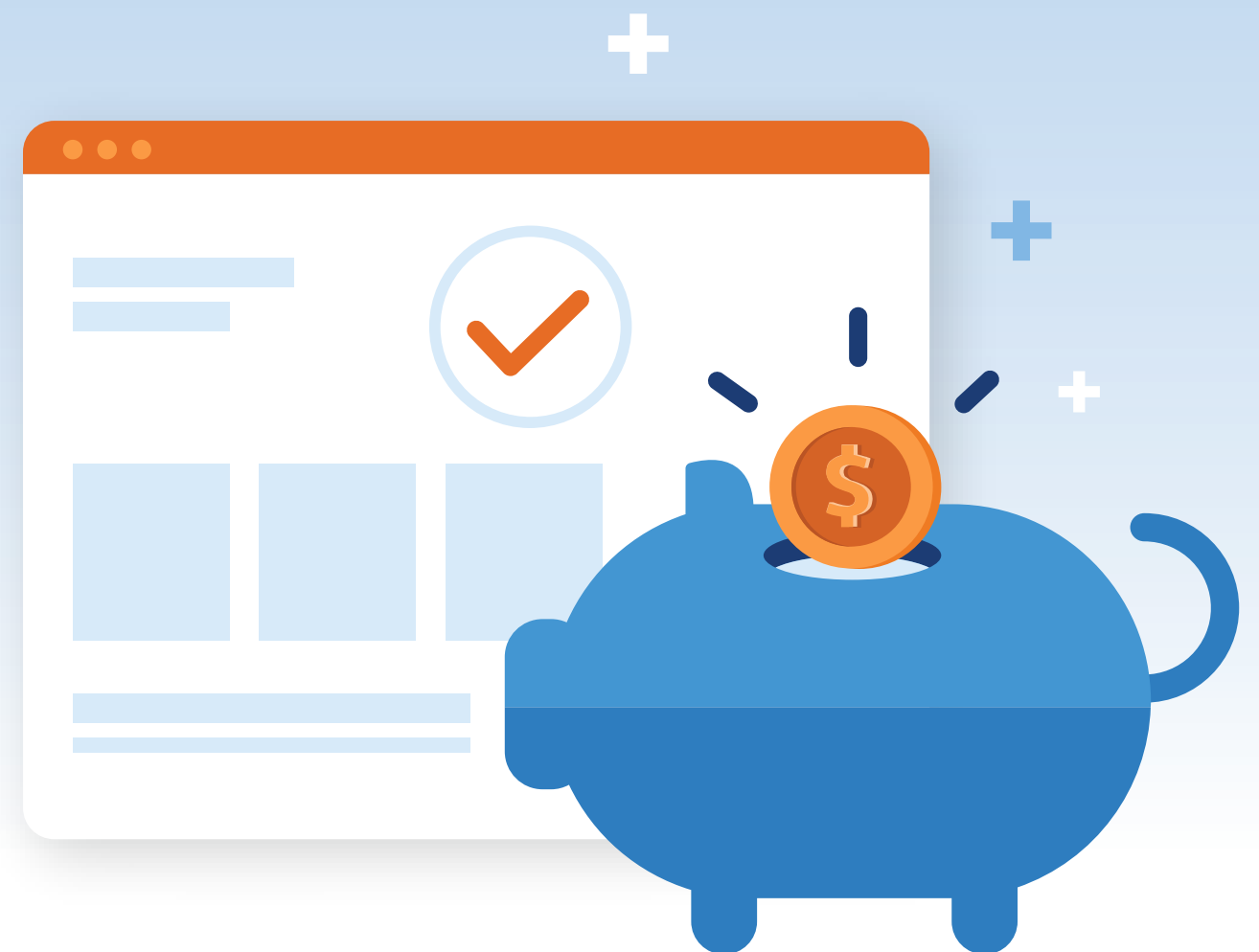
An overwhelming 80% of the Navy Federal membership have difficulty accruing saving. Additionally, only 30% of Americans have a financial plan that includes savings. To tackle this concern, I developed on a three-stage-concept based upon passive personalization and moving members into product acquisition for long-term savings.

This challenge required a simple, yet innovate approach, to make saving easily achievable through a phased approach, based upon an individual's specific financial circumstances. Helping members see the effects of a simple savings program will help them become financially secure.

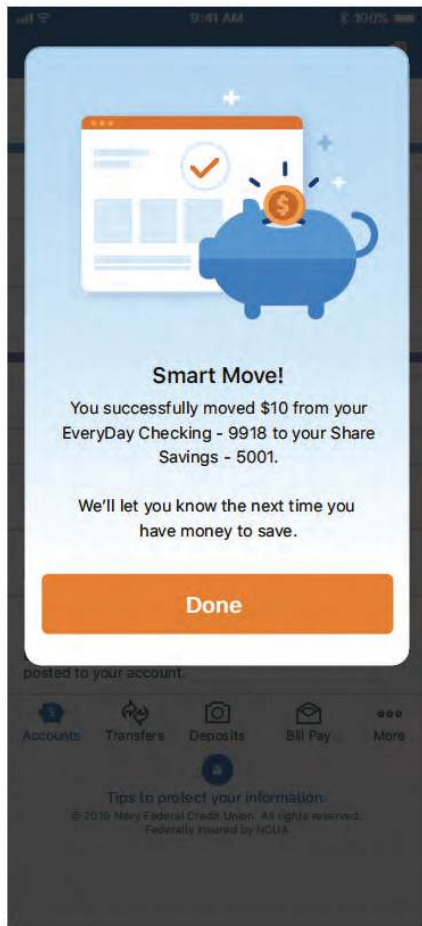
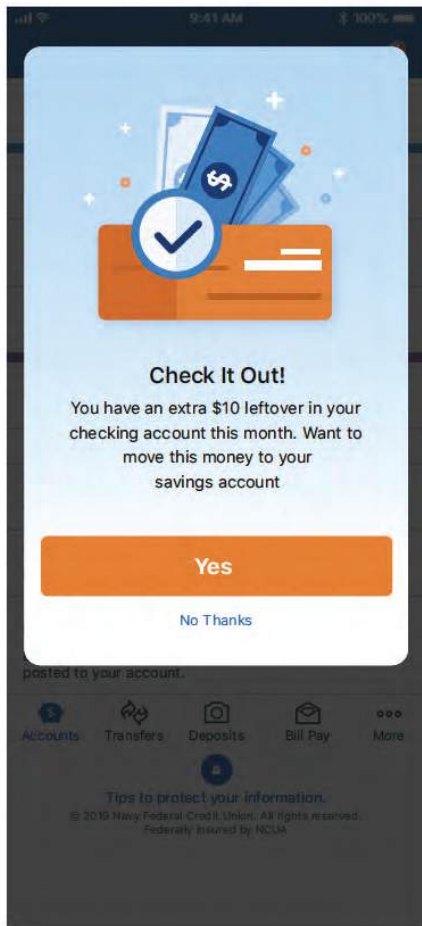
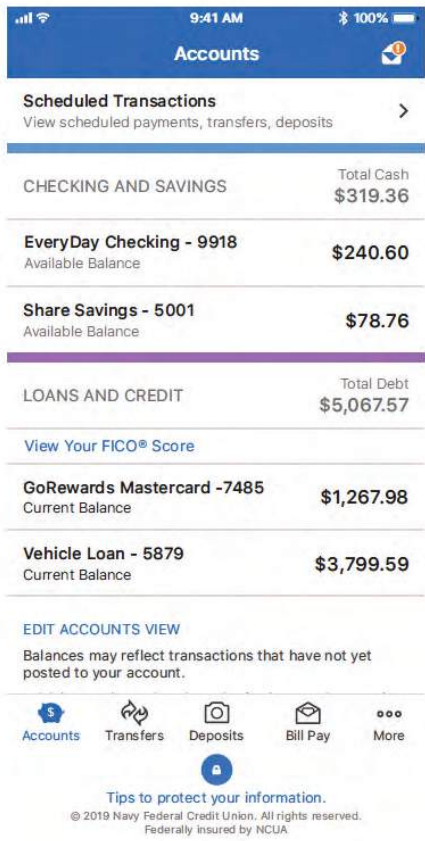
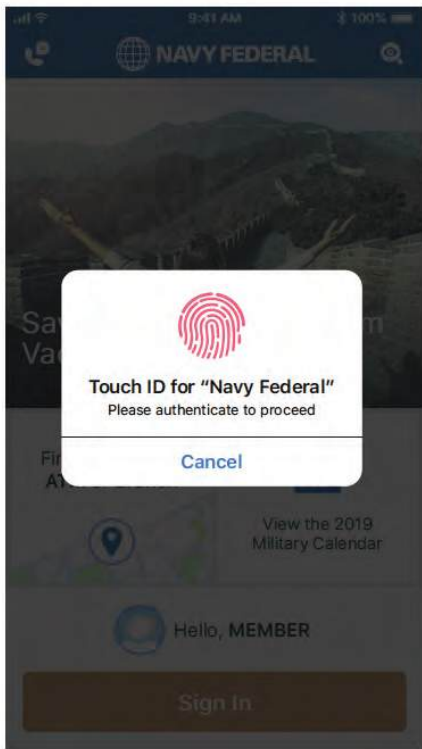
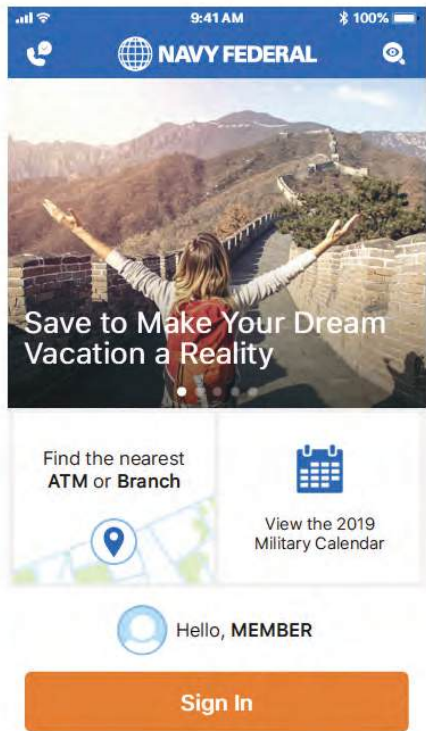
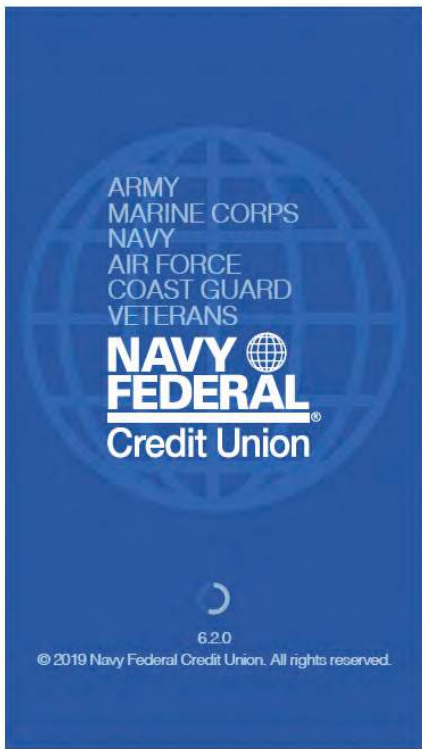
Project: Safe to Save Concept

Role: Head of UX and Design / UX Designer

Skills: Product strategy, R&D, Writing

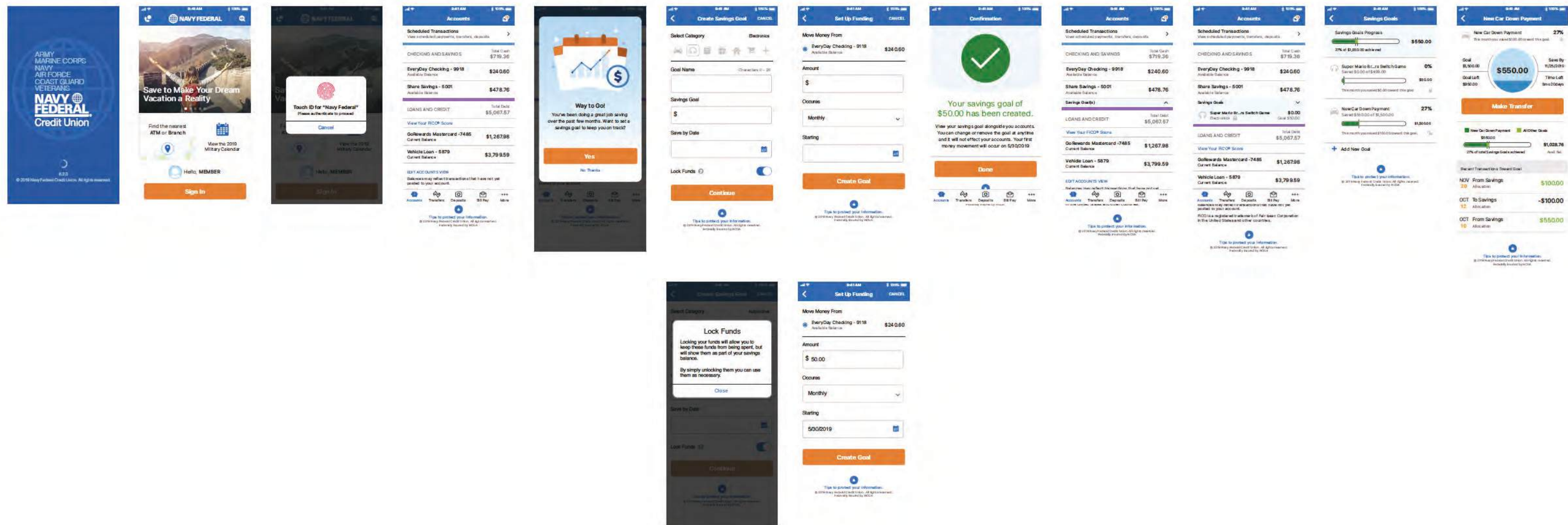


Passive Savings



Helping members understand they have the ability to save money is the first step in supporting them as they become more fiscally responsible. Analyzing historical data to identify spending and savings trends produces a roadmap for a passive method of saving, known as the Safe to Save model, which would ask a series of questions via prompts. For example, a member would be advised that they have a specific amount of funds available to save, and by responding to prompts, they could transfer funds.

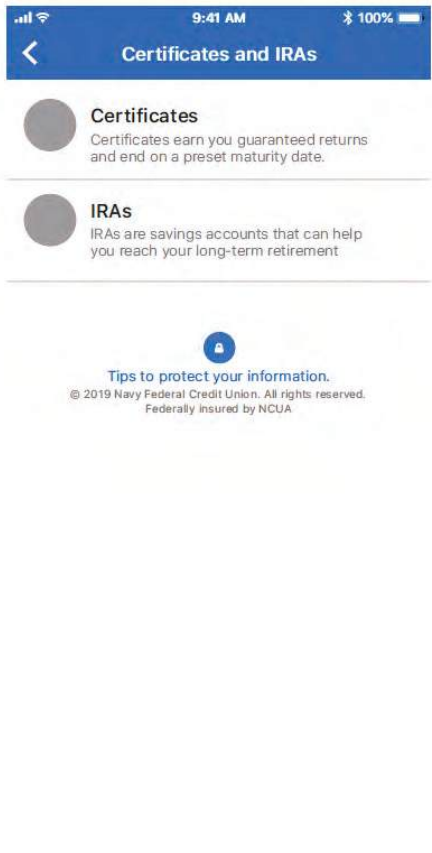
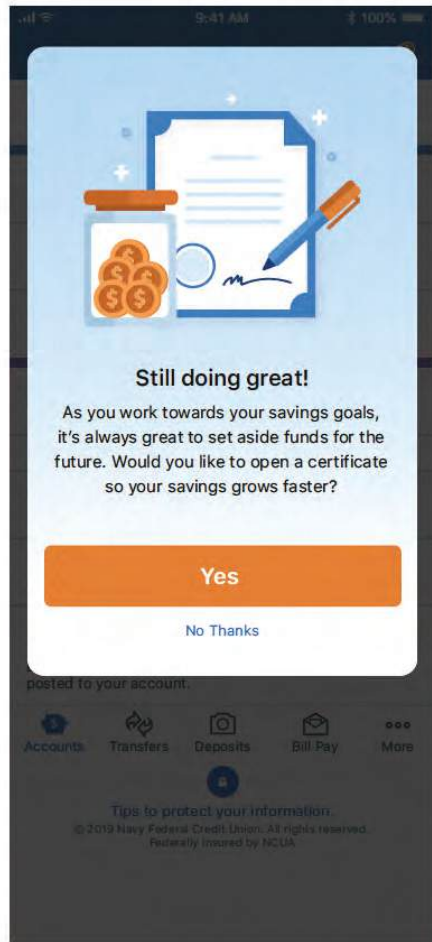
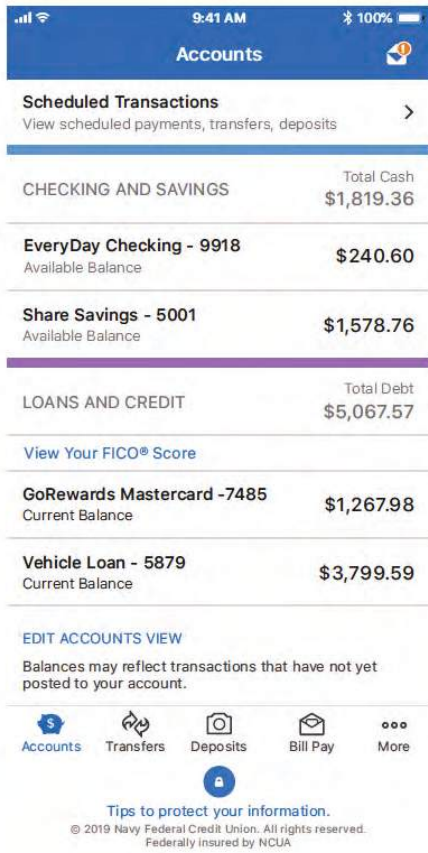
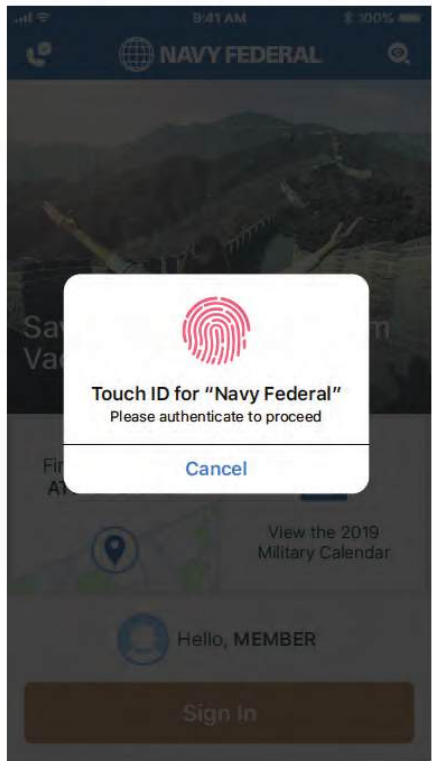
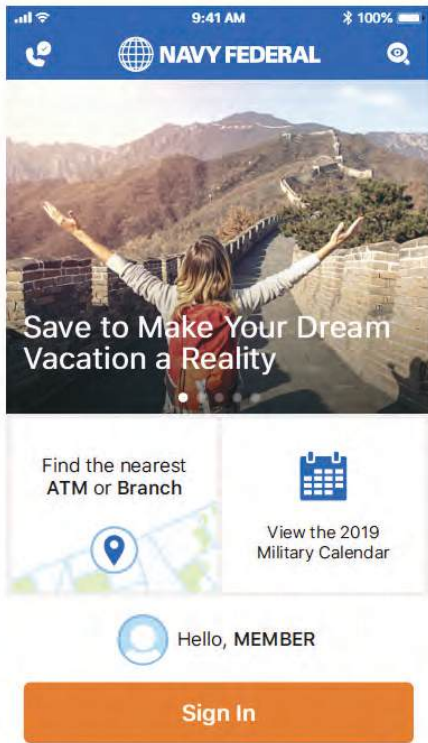
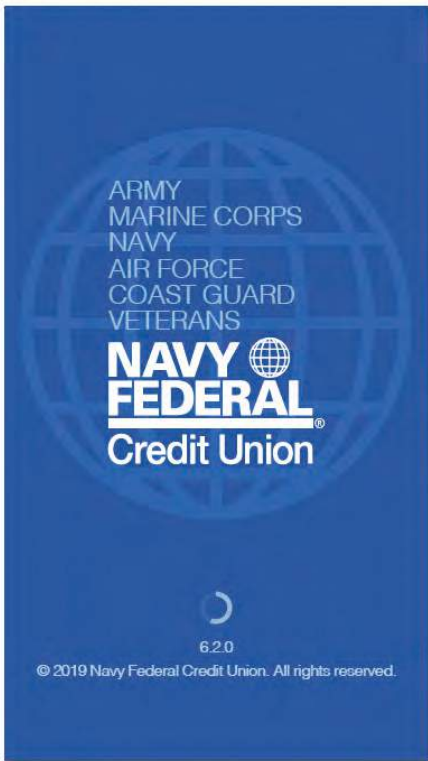
Setting Savings Goals



Once Navy Federal members grasp the concept of more fiscal responsibility through savings, they will be able to set small, attainable goals by locking away money and tracking progress. Since there are no barriers or deterrents such as applications, forms, or disclosures, members can easily build their saving accounts.

By creating an achievable model around small goals, members will see the value of saving with purpose, leading to more members consolidating their accounts to make Navy Federal Credit Union their primary financial institute.

Product Acquisition



Building wealth over time is the ultimate long term goal that is achieved through product acquisition. Product opening, such as high yield savings accounts, CDs and IRAs, is the final stage of Safe to Save. Guiding members to opening accounts where they can earn more interest on their savings leads to long term rewards.

This supports the brand message and the core goal of putting members first. Helping members reach their goals in turn puts them in the position of achieving milestones and becoming better banking customers. They become empowered to save and achieve savings goals while, moving toward longer term saving milestones.



Applications & Web Sites

Lead User Experience Designer

The following projects are a culmination of my work throughout my tenure at AOL and Navy Federal where I have served as the UX design leader, strategic product driver as well as problem solver of complex user needs balanced with business initiatives.

iPad Account Summary - In-Line Transfer

AT&T12:34 PM

Personal Account SummaryEditSign Out

Checking & Savings

Smith Family Checking - 6789Available Balance\$2,350.00

Everyday Checking - 567835672\$250.00\$350.00\$250.00

John's Savings - 1234Available Balance\$10,350.00

Loans & Credit

Platinum Visa Credit Card - 4567\$55.00Due 04/29/12PAY\$3,000.06

Ford F350 Auto Loan - 5678\$450.00Due 04/21/12PAY\$16,500.04

Mortgage - 1234\$1748.00Due 04/30/12PAY\$245,860.13

Certificate of Deposit (CDs)

Total Cash\$13,050.48

Total Debit\$265,610.23

Total Value\$1,500.00

Everyday Checking - 567835672

\$1.00

\$1.00\$350.00

\$1.00

drag amount to desired account

\$1.00

Everyday Checking - 567835672

\$175.00

\$1.00\$350.00

\$175.00

drag amount to desired account

\$175.00

Everyday Checking - 567835672

\$300.00

\$1.00\$350.00

\$300.00

drag amount to desired account

\$300.00

Everyday Checking - 567835672

\$300.00

\$1.00\$350.00

\$300.00

drag amount to desired account

\$300.00

Platinum Visa Credit Card - 4567

Current Balance

\$55.00Due 04/29/12PAY

\$3,250.06

Platinum Visa Credit Card - 4567

Current Balance

\$55.00Due 04/29/12PAY

\$2,950.06

Mortgage - 1234

Current Balance

\$1748.00Due 04/30/12PAY

\$245,860.13

Mortgage - 1234

Current Balance

\$1748.00Due 04/30/12PAY

A transfer cannot be applied to this account

Transfer

Please review the information to complete your transfer.

From	Everyday Checking - 5672
To	Visa Card - 4567
Amount	\$ 300.00
Date	05/14/2012

Cancel

Make Transfer

Please make sure there are sufficient funds in your From account to avoid a possible fee. Overdraft protection may be used for this transaction.

Transfer Confirmation

✔ Your transfer was successful

From	Everyday Checking - 5672
To	Visa Card - 4567
Amount	\$ 300.00
Date	05/14/2012

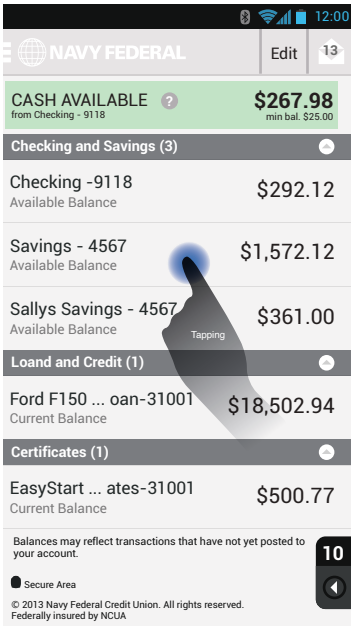
Confirmation # 6427846789

Close

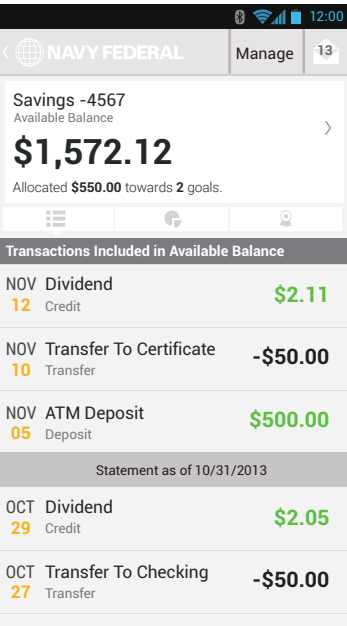
Navy Federal Credit Union's end of business day is 7:30 p.m. ET, Monday through Friday, excluding Federal holidays. Transactions occurring after this time will be posted the next business day.

Android - Savings Goals

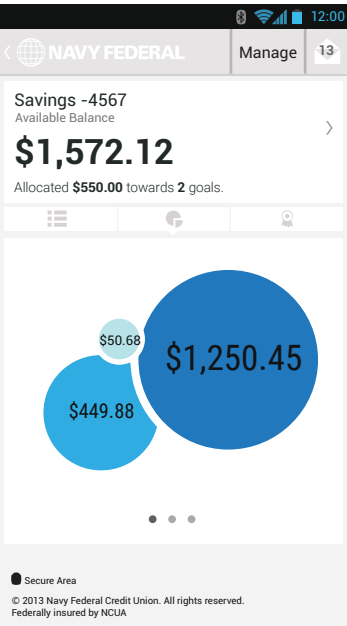
6.0 Account Summary



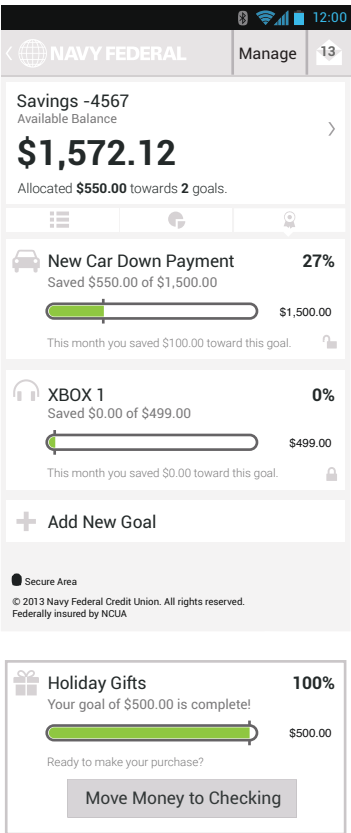
6.1 Savings Account Details - Transaction List



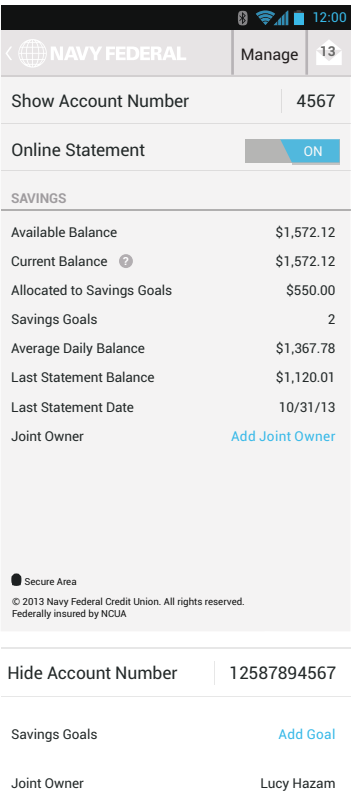
6.2 Savings Account Details - Data Visuals



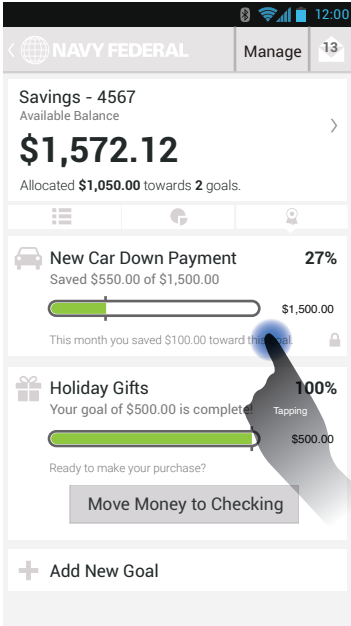
6.3 Savings Account Details - Goals



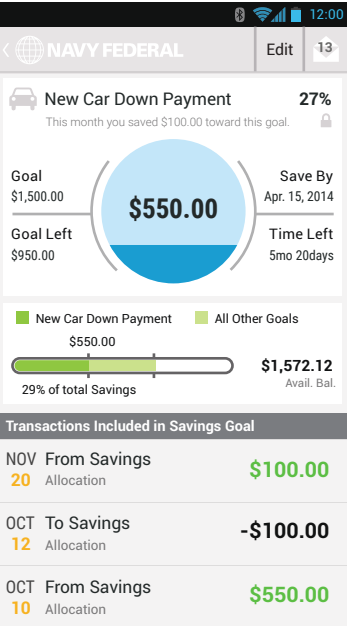
6.4 Savings Account Enhanced Details



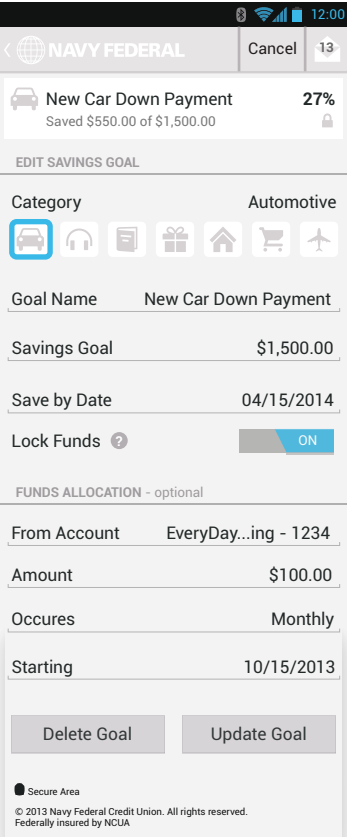
6.5 Savings Account Details - Goals



6.6 Savings Goal Detail

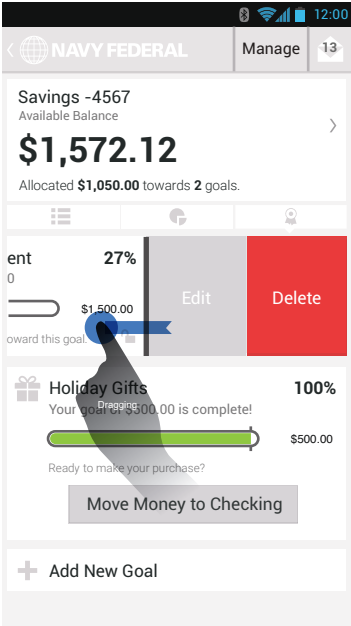


6.7 Savings Goal Edit

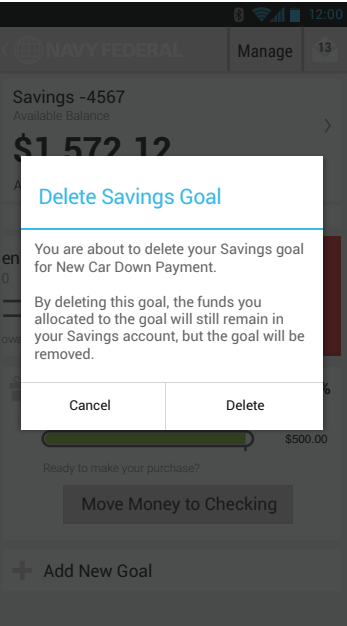


- Automotive
- Entertainment
- Education
- Gifts
- Home
- Shopping
- Travel

6.8 Savings Account Details - Inline Delete/Edit Goal



6.8 Delete Goal



THE

Technical Charting Web Application

