

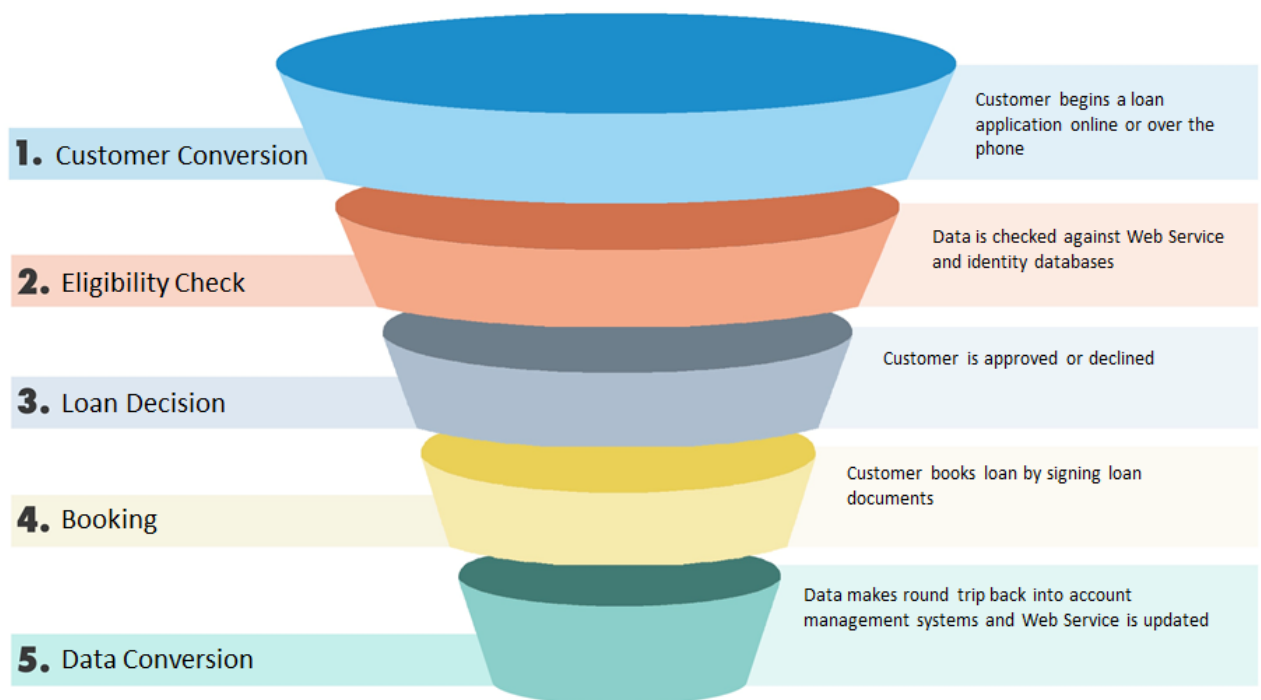
New Lending System Development

OVERVIEW

The purpose of this project was to develop a new loan origination system and a front-end application website. The strategic objectives included the following:

- Improve user experience by upgrading user interfaces, content, design, functionality, workflow, and triggered communications
- Improve analytics and reporting capabilities
- Support business development initiatives
- Fully integrate with other systems

Loan Origination Process



To accomplish this, the marketing team worked with third-party vendors and internal business units to adapt back-end systems to meet business requirements. The front-end website was created with attention to the following:


- Overall UX best practices
- Innovative UX treatments in online lending industry
- Responsive design for mobile adaptability
- Branding guidelines
- Proper presentation of legal consents and disclaimers
- Integration of contact solutions (click-to-call, live chat, office location information)
- Applicant authentication and security
- Personalized, dynamic content and functionality
- Logical and strategic applicant flow with strong focus on conversion

PROJECT TASKS

In my role as Marketing Project Manager, I was responsible for managing all aspects of the process from start to completion of the New Lending System. In addition, managed the process of Legal review for all content. See below for an outline of the tasks accomplished.

Step 1: Background

Studied the existing system to look for potential improvements, assess the current workflow, take note of conversion issues, and better understand what our customers experienced.



LOGIN

SECURITY

1-888-430-5176

CHAT

EMAIL

1234

HOW IT WORKS?

NEED AN AFFORDABLE MILITARY LOAN? LET'S GET STARTED

In just minutes you can apply online for a military loan. It's quick, secure, and easy.

To apply online you must: have an open bank account and accept an electronic funds transfer of loan proceeds. If you do not wish to apply online or if you wish to apply jointly call 1-855-622-9106.

Federal law requires identity verification; we will obtain credit information and take necessary actions to verify your identity. All information is protected by our privacy policy.

First Name:

Middle Initial:

Last Name:

Suffix:

Email Address:

Confirm Email Address:

Date of Birth:

Select Military Status:

Select Military Service Branch:

Active Duty Military (Full-time)

Prior Military Service (<20 Y)

Career-Retired Military (20+ Y)

Medically Retired

National Guard/Reserve

ARMY

NAVY

AIR FORCE

MARINES

COAST GUARD

Clicking Continue constitutes a signature

CONTINUE >

ELIC

To app

Active

Career

Medical

Submit Application – tell us about yourself, your employment and your finances

Send Documents – upload, email or fax requested documents for proof of income and identification

Finish! – login to see the status of your application and watch for emails from us as your application is reviewed

Requirements:

Must be the actual named applicant

Provide verification of identity

Provide proof of income (may include LES, RAS, Pay Stub)

PRIVATE & SECURE

Pioneer Services is proud to offer a safe and secure online experience. The key principles of our policy:

We collect only the information necessary to provide the services you requested

We will never sell your personal information

We employ safeguards to ensure the safety and confidentiality of your information

See our Privacy Policy and Terms of Use to learn more.

Norton SECURED

TRUSTe Certified Privacy

QUESTIONS?

Call

Email

Chat

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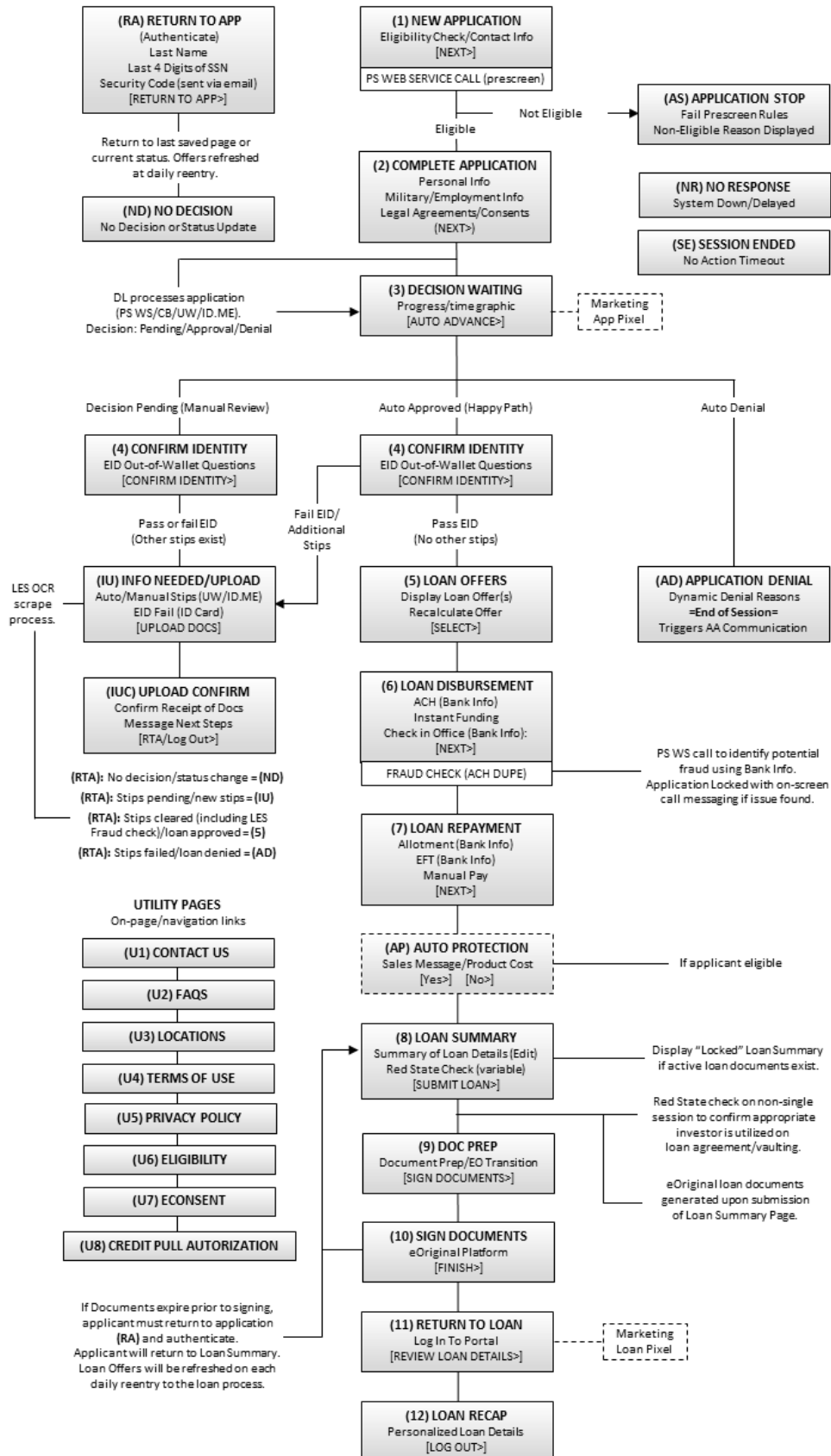
MidCountry Bank is a member FDIC. All loan applications are confidential and subject to our credit policies. No official U.S. military endorsement is implied. Please refer to [Privacy Policy](#) and [Terms of Use](#) for additional information.

Step 2: Applicant Flow

Identified all pages needed for the front-end website, solidified naming conventions for each, and created a sitemap of possible scenarios an applicant may encounter throughout the process.

V8_6.8.18_FINAL

Consumer Portal (CP) Sitemap/Applicant Flow



Step 3: Background

Identified all required form fields to be shared among origination system, account management system, and the data warehouse across all pages in the website.

Example:

Required Fields	
Origination	Account Management
First Name	First Name
Middle Initial	Middle Initial
Last Name	Last Name
Suffix	Suffix (added to end of the last name field)
Email Address	Email Address
Date of Birth	Date of Birth
Military Status	Military Status
Active Duty	Active Duty Military (Full Time)
Veteran	Prior Military Service (<20 Y)
National Guard/Reserve	Career-Retired Military (20+ Y)
	National Guard/Reserve
Duty Status (if Veteran)	DoD GS-6 or Above
Career Retired	
Medically Retired	
Prior Military	
Duty Status (if NGR)	
Active Guard/Reserve (AGR)	
Traditional Guard/Reserve	
Individual Ready Reserve (IRR)	
Inactive National Guard (ING)	
Military Branch	Military Service Branch
Army	Army
Navy	Navy
Air Force	Air Force
Marines	Marines
Coast Guard	Coast Guard
	Government

Step 4: Research Best Practices

Collaborated to research industry-leading financial and tech websites, plus articles from thought leaders and online communities, to determine the best practices for individual form fields. This included working with developers on unique solutions to meet business and legal requirements while accounting for their back-end capabilities.

Step 5: Begin Requirement Documents

Managed the creation of individual documents for each page in the front-end website, with attention to the following:

- Page URL
- Required form fields
- Required functionality
- Validation and error messaging
- All content, including headers, sub-headers, body copy, form field labels, placeholder text, dropdown options, call-to-action buttons, disclaimers, pop-ups, navigation, etc.
- Background information, instructions, and notes for developers
- Rough layout and formatting
- Internal notes and discussion topics

These requirement documents were updated as needed in accordance with the iterative development process.

Example:

LOAN OFFER

Offer Display #2: one offer, one rate, variable offer amount, PB refinancing a Current Loan to receive new cash. Only one investor offer available or being presented.

Example: PB applicant owes \$2,125.47 on current PS Loan. \$250 fresh cash requirement sets the minimum loan size at \$2,375.41. Per UW guidelines, the applicant qualifies for a max loan amount of \$6,000 (Maximum Cash to You of \$3,874.53).

CONGRATULATIONS! YOUR LOAN REQUEST IS APPROVED

You're approved for the loan offer outlined below. You can use the entry box and update button below to adjust your loan amount. Please review your loan details after each adjustment.

Because you currently have a loan with Pioneer Services, we'll use part of the new loan to pay off your existing balance. The rest is all cash to you.

Min Loan: \$2,375 Max Loan: \$6,000
|-----|

Loan Amount: [Update]

Your Loan Amount must be between \$(Min) and \$(Max).
You must click the Update button to change your Loan Amount.

Current Loan Payoff: (\$2,125.47)

Cash to You: **\$2,374.53**

Loan Details	Current Selections
Amount Financed	\$X,XXX.XX
Origination Fee*	\$XXX.XX
Interest Paid	\$XXX.XX
Total Payments	\$X,XXX.XX
Interest Rate	XX.XX%
APR	XX.XX%
Loan Term	XX Months
Monthly Payment	\$XXX.XX

[ACCEPT LOAN OFFER]

*Origination Fee is a percentage of the loan amount. Your final loan details may vary based on the date you complete the loan or if you make additional elections.


You will be presented with a summary of all costs and fees prior to signing your loan documents. You will also have the opportunity to change or edit your selections.

Step 6: Design Template

Managed the creation of a design template, which defined the standard for each individual element of an average page, including the global navigation and footer, font treatment, style, brand colors, alignment, spacing, and more. This template was used as the standard during manual QA testing.

Example:

HEX COLOR: #A33038 (RED) 15 PX HEIGHT #004065 (BLUE ^^) 10PX HEIGHT



CHAT CONTACT FAQ LOG IN

[H1 TAG] ARIAL NARROW BOLD | FONT SIZE 20PT | COLOR #FFFFFF | BAR HEIGHT: 30PX HEADER BAR COLOR: #527C92

HEADER COPY: ALL CAPS | [H2 TAG] ARIAL NARROW BOLD
FONT SIZE 18PT | DEFAULT COLOR #004065 | 25PX FROM HEADER^^

Body Copy (<p tag>):
Arial Narrow 16 pt Font Family: Arial Narrow | Default Color: #58595b
 Optional

Line Color: #8b8078 | Line Size: 2px | Line width: 600px

SPACING BETWEEN SECTION/FIELD BREAKS SHOULD ALWAYS BE 25px ^

TABLE HEADER COPY: ALL CAPS
[H2 TAG] ARIAL NARROW BOLD | FONT SIZE 18PT | DEFAULT COLOR #004065

Body Copy (<p tag>):
Arial Narrow 16 pt Font Family: Arial Narrow | Default Color: #58595b
 Optional

Sub Header Text: Initial Cap
[H3 tag] Arial Narrow Bold | Font Size 18pt | Default Color #004065

Body Content Area:
<< 40px left and right margin >>
<< 115px left and right margin to table and indented content >>

Field Box Info: Max Width 450x | #ffffff interior | #aea299 1px border | Spacing between fields is 35px

Single Size
450px x 40px. 8px Rounded Corners (ALL FIELDS)


Double Size
215px x 40px. 10px margin between

Triple Sizes
130px x 40px 10px margin

Field Font
Arial Narrow 15pt | Font Color: #afa79f

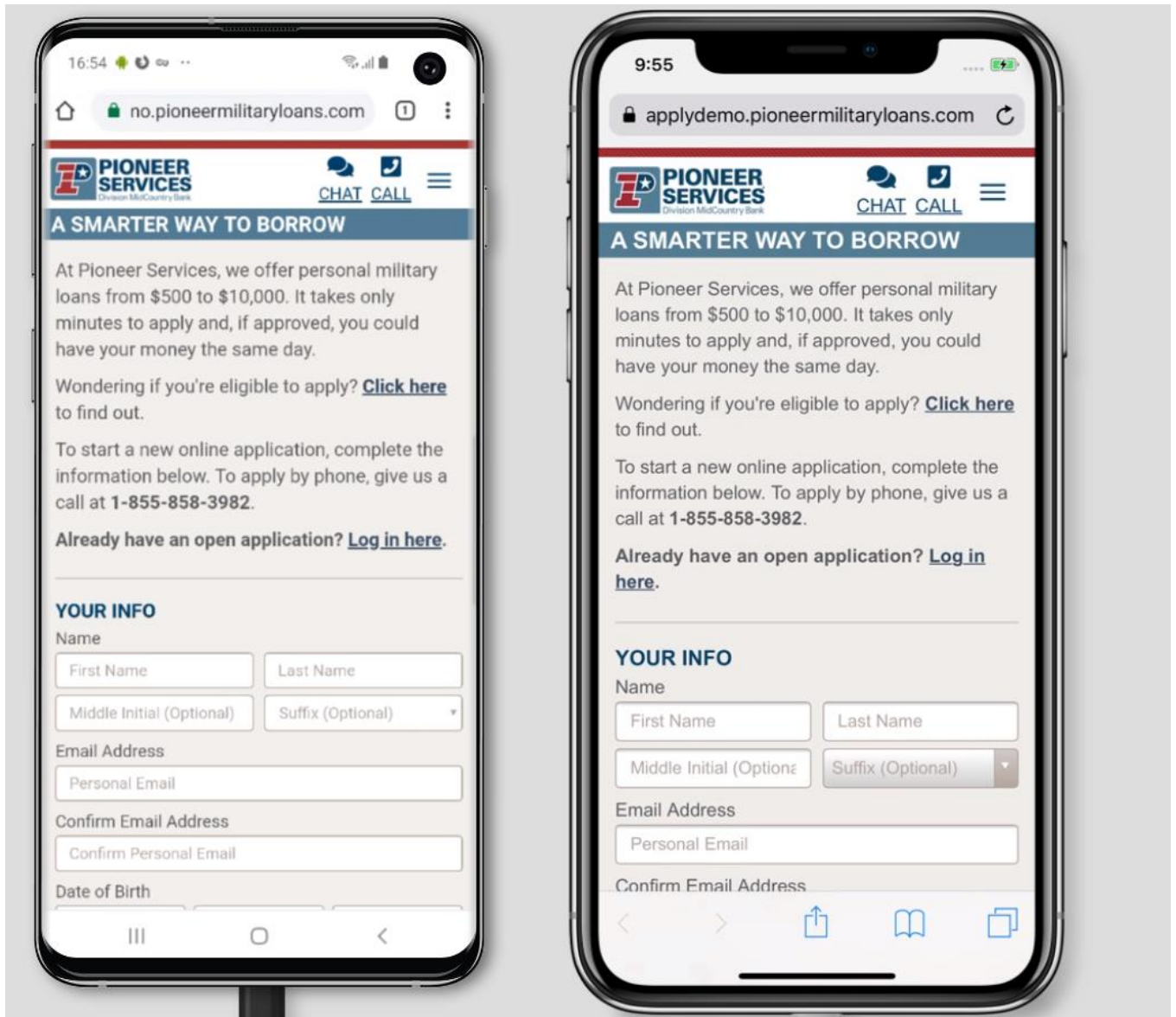
Right Rail Fonts
Right Rail Title Font: [H3 tag]
Right Rail Body Font [p tag]

Right Rail Size
<40px right margin
345px (content area)
40px>> left margin



Step 7: Mobile Design

Managed the direction to the developers about responsive design and how the front-end website should adapt for mobile devices, including form field widths, spacing and alignment, the mobile menu, etc.



Step 8: Triggered Communication Strategy

Reviewed the existing triggered communications (automatically generated emails and print letters) and eliminated all outdated or unnecessary messages. Matrix created based on business requirements, legal and compliance requirements, and the workflow of the new system. Worked with other business units to determine the timing and core messaging based on various trigger events and worked with back-end developers to build desired triggers into the origination system.

Matrix Example:

Channel/ Applicant Type	Item #	Communication Template Name	Legal/ Regulatory Required	Required Recipient(s)	Communication Format	Message Direction	Message Form	Trigger Rules	Trigger/Send Timing	Trigger Vendor(s)	Distribution Vendor(s)	Firewire Director Archive Required	From Display Name	From Address
Direct	1A 1B	Partial Application: 1-Day Follow-Up Partial Application: 3-Day Follow-Up	No	Applicant	HTML Email	Remind applicant(s) that they are eligible to apply and encourage them to return to complete a full application. Provide info on all application channels (online, voice phone, LPO). 1 and 3-day follow-up use same message.	Standard content. Personalization: Name	Completed and passed eligibility questions, but did not submit complete application on the same day. Remind email if still haven't submitted complete application within 3-days. Applies to both online and voice phone applicants.	Trigger: 1-Day and 3-Day queries Send Email: Immediate	TCL Decision Lender	TCL Decision Lender	No	Pioneer Services	pioneeremail@pioneerservices.com
Direct	2A	Completed Application Confirmation (Contains Return To App Security Code)	No	Applicant	HTML Email	Alert applicant(s) that we have received their completed application request. Share details on how to reenter the online process (including use of their Security Code) and how to contact us via phone/email with questions during the application process.	Standard content. Personalization: Name, App ID, Security Code	Sent immediately upon submission of complete application (page 2 of online app). Applies to both online and voice phone applicants.	Trigger: System Real-Time Send Email: Immediate	TCL Decision Lender	TCL Decision Lender	No	Pioneer Services	pioneeremail@pioneerservices.com
Direct	2B	Security Code Reset	No	Applicant	HTML Email	Provide new "Security Code" to applicant. Code will replace previous code sent to applicant. Remind applicant of how to reenter the online process. Include link to Return to App page.	Standard Content. Personalization: Name, App ID, New Security Code	Sent immediately upon applicant request to reset Security Code. Applicant must pass qualifying questions on Reset Page to confirm identity (email address, last 4 digits of SSN, DOB). New Security Code sent to email address connected to active application. Security Code reset and email can also be triggered within DL by a Pioneer Prep applicant, phone call or LPO visit.	Trigger: System Real-Time Send Email: Immediate	TCL Decision Lender	TCL Decision Lender	No	Pioneer Services	pioneeremail@pioneerservices.com
Direct	3A	Adverse Action (Application Denied) (Have e-consent)	Yes AA Info	Applicant	HTML Email with pdf attachment Use SC for Print Letter Backup if email is undeliverable	Alert applicant(s) that their loan request was denied and provide complete denial reasons with required disclosures in attached pdf. Email or print format pending prior e-consent.	Dynamic content (denial reasons and disclosures).	Application denied at any point in the process (auto or manual denial). DL to confirm prior e-consent. If email undeliverable, print letter sent.	Trigger: System Real-Time Send Email: Immediate Mail Ln: Daily Batch	TCL Decision Lender	TCL Decision Lender TCL Mailhouse	Yes (Archive pdf attachment & meta data)	Pioneer Services	pioneeremail@pioneerservices.com
Direct	3C	Adverse Action (Application Denied) (No e-consent)	Yes AA Info	Applicant	1st Stage Print Letter, including cover letter Attachment: print from bank			Same as above, but DL has confirmed NO prior e-consent.	Trigger: System Real-Time Mail Ln: Daily Batch	TCL Decision Lender	TCL Decision Lender TCL Mailhouse	Yes (Archive pdf attachment & meta data)		
Direct	4A 4B 4C	Info Requested: 1-Day Reminder Info Requested: 3-Day Reminder Info Requested: 5-Day Reminder	No	Applicant	HTML Email	Alert applicant(s) that additional information is needed in order to finalize a loan decision. Info requested (dynamic or custom strips) are displayed within the email with directional content on how to upload or email as information. Email to include strips for Borrower and Co-Borrower (when relevant). Message to become more aggressive with each communication.	Unique content for each reminder timeline. Dynamic and/or custom strips. Include: App ID	Additional information (outstanding strips) are needed from applicant. Send email when no response received by the following timeline: 1-Day: sent next day after initial request for info. 3-Day: sent 3-days after initial request for info. 5-Day: sent 5-days after initial request for info.	Trigger: 1-Day, 3-Day, and 5-Day queries Send Email: Immediate	TCL Decision Lender	TCL Decision Lender	No	Pioneer Services	pioneeremail@pioneerservices.com
Direct	5A	Info Requested: Final Notice (Have e-consent) Sent 7 days prior to app expiration	Yes Reg B Info	Applicant	HTML Email Use SC for Print Letter Backup if email is undeliverable	Alert applicant(s) that they only have a few days left (display expiration date) to send requested information (display strip) and complete the loan process. Include pdf attachment with repeat of info and legal language (expiration notice) to satisfy	Dynamic and/or custom strips. Include: App ID	Additional information (outstanding strips) are still needed from applicant. Trigger email to be sent 7 days prior to application expiration date (22 days after submission of completed application). DL to confirm prior e-consent. If email	Trigger: 23-Day query Send Email: Immediate Mail Ln: Daily Batch	TCL Decision Lender	TCL Decision Lender TCL Mailhouse	Yes (Archive with meta data)	Pioneer Services	pioneeremail@pioneerservices.com

Step 9: Write and Design Communications

Managed the development all content for emails and print letters, including from name, from address, subject lines, global templates and signatures, headers and footers, body copy, dynamic flex fields, call-to-action buttons, and links. Provided HTML files to the vendor to build emails, keeping responsive design and mobile standardization in mind.



Your Loan Was Approved – Claim It Today

Dear Charles,

Your loan request with Pioneer Services has been approved, which means your money is waiting for you. Is there anything we can do to help you finish?

When you're ready to finish up, simply use the Security Code we sent you earlier to [log in](#) to the application. You'll be returned to your last saved point. It only takes minutes to finish up and get the cash you need.

GET MY MONEY

Thanks again for choosing Pioneer Services. If you have any questions, please don't hesitate to contact us at 1-888-430-5176.

Sincerely,

Pioneer Services
Division of MidCountry Bank
[PioneerMilitaryLoans.com](#)

Step 9: Testing Plan

Managed the creation of a testing plan both the site and triggered communications for the iterative development and quality assurance process. Testing for this project was ongoing and extremely agile, often featuring direct contact between testers and developers of all involved parties. This process also included ongoing refinements of marketing and UI requirements, researching unique solutions, and collaboration between vendors and other business units to create the best end-product possible.

Worked closely with technology teams to identify test data and configure web services to simulate specific scenarios in a demo environment.

Managed the creation of spreadsheets with test cases that detailed every aspect of QA testing needed in order to sign off on marketing requirements.

Example:

[illegible]

Step 10: End-to-End Manual Testing

Once released by the development partner for testing, reviewed the UI of each page in the front-end website to test the design, content, and functionality, including break testing and detailed QA and all possible scenarios an end user could encounter. High-level results, including screenshots, were recorded in the testing spreadsheets for replication and internal discussion. This included both desktop and mobile testing, using a variety of the devices, browsers, and operating systems most frequently used by our customers, as defined by Google Analytics.

This process included full testing of the triggered communication system, covering all scenarios necessary to trigger each customer communication and ensuring that the following was correct:

- Send timing, based on trigger event
- Content, design, and functionality of all messages
- Dynamic flex fields populating correctly
- Correct attachments and cover letters
- Print letters generated and sent as needed

Supported other business units in their testing efforts, as there was frequent crossover between the UI and the back-end loan decisioning system. This included alerting other testing teams of issues encountered, collaborating to cover common ground, clarifying marketing and UI requirements, and helping to replicate their results.

Example:

Info Needed Stips (Doc Upload/Text Box)				
Intro Copy	Copy (see copy doc)	Includes link to "Upload		
	Predefined Stip (Description). See copy doc.	Static text.		
	Choose File (Button)	Device-native functionality allows user to browse and attach individual files. Once file has been attached, filename appears on portal. Error message displays if invalid file type is attached (see copy doc). File is saved to Consumer Portal and remains viewable on Upload page until page is submitted. Need to define additional native DL errors (eg., file name character limit, file size limit, etc.)	2634 If file is over the size limit of 7 MB, portal displays an error message. However, the portal still displays the file name, making it appear as if the file is attached. Clicking the CTA generates "Required" error because the file is not actually attached. This is confusing for the user. If there's an error for an	
	File Chosen	Static text. Portal displays "No file chosen" by default. The filename of the user's document		
	Trash (Button)	Allows user to remove attached		
Doc Upload	Add File+ (Button)	User must click Add File button to begin attaching files. Button remains below each upload field so user can add additional files if needed.		2635 Design treatment for the Add File button is incorrect. The default state and hover state are correct. However, there's a third, unspecified design state after the user clicks the button with the text changed to black. When a user clicks the button, it should automatically revert back to the default state like all other buttons in the portal.
				See IMAGE 2

Step 11: Submitting Defects

Reviewed all defects submitted to ensure the appropriate information was captured. Once a defect was discovered and replicated, it was communicated internally to marketing leadership. It was then reviewed by executive leadership from various business units to determine whether it was to be escalated, accepted as is, or reserved for post-launch development.

If escalated, each defect was entered into project enterprise software for internal tracking and compliance purposes, and formatted to be sent directly to the developers. Each ticket included the following fields:

- Priority (blocking, high, medium, low)
- Page or function
- Brief summary
- Detailed description
- Requirement document
- Testing prerequisites
- Replication steps
- Instructions for the development required for resolution
- Screenshots

Example:

The screenshot displays the TestTrack Project Enterprise software interface for editing a test issue. The window title is "TestTrack - Project Enterprise - [Edit Test Issue #2787]". The interface includes a menu bar (File, Edit, View, Create, Workflow, Activities, Tabs, Format, Email, Tools, Window, Help) and a toolbar with icons for Dashboards, Test Issues, Test Cases, Test Runs, Workbook, Folders, Customers, Users, Security Groups, Test Configs, Filters, and Reports. Below the toolbar is an address bar. The main form area contains the following fields and data:

- Summary:** Offer recalculation does not currently work per requirements. In CP, if the user changes their Loan Amount using the entry box and then clicks the Update button, the portal attempts to recalculate the Loan Details. However,
- Status:** Closed (Fixed)
- Disposition:** Open - Not Reviewed
- Type:** Bug - Software inconsistency
- Priority:** Blocking
- Product:** Consumer Portal (CP)
- Requirement Type:** NID
- Reference:**
- Vendor:**
- Entered by:**
- Date Entered:** 8/31/2018
- Required for Go Live:** Yes
- NID:** 426, 486, 565, 628, 629, 630, 636, 645, 724, 743, 740
- Notes:**
 - 09/17/2018 - Retested with apps 15258, 15239, 15181. Able to recalculate offers on CP. Confirmed with Marketing and no longer an issue. Retest Passed.
 - 8/30 - App# 14644
 - 8/30/2018 - Repro to [redacted] after conf from [redacted]
 - Requirement doc: (5) Loan Offers
- Category:** <not set>
- Vendor Notes:**

Below the main form is a tabbed interface with tabs for Overview, Detail (selected), Custom Fields, Workflow, Workaround, Source Files, Email, Links, Folders, and History. The "Current Report" section shows "1 of 1" and "1" in a dropdown. The "Found by" field is populated with a name. The "Date" field is set to 8/31/2018, and the "Version" field is set to 4.0. The "Description" field contains the following text:

[Loan Offers] Blocking defect. Offer recalculation does not currently work per requirements. In CP, if the user changes their Loan Amount using the entry box and then clicks the Update button, the portal attempts to recalculate the Loan Details. However, the portal does not accept the new amount and reverts back to the default presentation. If a user enters a valid amount in the Loan Amount entry box (between their min and max), the portal should accept their entry and recalculate the Loan Details accordingly.

Requirement doc: (5) Loan Offers

Prerequisite step:

1. Identify applicant data for a user who will be auto-approved for a loan with a variable Loan Amount.

Reproduction steps:

1. Start a new application for the applicant identified in Prerequisite Step 1
2. Use disable steps on Page 2 to simulate Happy Path
3. Advance to the Loan Offers page
4. Use the entry box to change the Loan Amount to a valid amount and select the Update button to recalculate the offer

====>[ISSUE] Offer recalculation does not function correctly. The portal currently reverts back to the default Loan Amount and does not allow the user to adjust their offer per requirements.

====>[REQUIRED] The Loan Details (including Current Loan Payoff and Cash To You in PB refinance presentations) should recalculate each time the user enters a valid amount and clicks the Update button.

Screenshot attached

At the bottom of the window, there are buttons for "Create Test Case...", "Send Email...", "Apply", "OK", and "Cancel".

Step 12: Tracking Defects

Created a separate spreadsheet and recorded each defect allowing other relevant business units and leadership to see the details in a snapshot format and track the current testing status. Testing status was marked as either:

- Ready for retest
- Failed retest
- Passed retest
- Designated for post-launch
- Marked obsolete

Example:

	A	B	C	D	E	F	G	H	I	J	K	L
	TCI ID#	Test Track Issue #	Consumer Portal Page	Ticket Description	Requirements or FTW	Requirement	Date Entered in Test Tra	Linked?	Testing Status	Date/Notes	Req'd for Go Live	
1		2722	Repayment	[Repayment] The alignment for the subheaders and related content for each of the three disbursement options (MyPay Allotment, EFT, and Manual Repayment) is not correct. Per global design specs, the following content should all be left-	Requirement		8/7/2018	2722, 2724	Pass	9/27/2018 Retest Pass	No	
89	D-17611	2723	Repayment	[Repayment] The error message for a blacklisted routing number for EFT Repayment is incorrect. Currently, this error states "Sorry, we're unable to accept the bank account you entered as a backup for repayment...." This error should	Requirement		8/7/2018		Pass	9/13 Passed (Closed/Fixed)	Yes	
90	D-17610	2724	Repayment	[Repayment] When generating the error message for blacklisted routing numbers for both MyPay Allotment and EFT, portal incorrectly generates a horizontal line separator between the "Confirm or Enter..." subheader and the	Requirement		8/7/2018	2722, 2724	Pass	9/13 Passed (Closed/Fixed)	Yes	
91	D-17602	2725	Page 2	[Page 2] The spacing between the error messages and the data entry fields for Special Military Pay are inconsistent with the rest of the pages and form fields throughout the portal.	Requirement		8/7/2018		Pass	9/28 Passed Retests (Closed/Fixed)	No	
92	D-17602, D-18468, D-19217	2732	Log Out Confirmation	[Log Out Confirmation] The log in/out link in the utility nav is currently "Log Out." This should be Log In, as this page can only be accessed if the user has logged out of their session.	FTW		8/7/2018		Pass	10/18/2018 Passed Retests 10/15/2018 RETEST FAILED Defect can still be replicated by	No	
93	D-17848	2734	Log Out Confirmation	[Log Out Confirmation] The alignment of the "Log In" CTA button is not correct. Per design specs, all CTA buttons and form field buttons throughout the portal share a standard 115px spacing between the left side of the content area and	Requirement		8/13/2018		Pass	9/28/2018 Passed Retests (Closed/Fixed) 8/22 Submitted to TCI	No	
94	D-17843	2737	Session Ended	[Session Ended] The content of the countdown timer is not correct. Currently, the portal displays "X minute(s) X seconds" Per requirements, this countdown should be formatted as "2:00" to start and	Requirement		8/13/2018		Pass	9/27/2018 Retest Pass 8/22 Submitted to TCI	No	
95	D-17843	2738	Session Ended	[Session Ended] The font treatment for the line of content starting "You will be logged out..." is not correct. It is currently smaller font and bolded. The font treatment should match the other line starting "Do you want..." and all other	Requirement		8/13/2018		Pass	9/27/2018 Retest Pass (Closed/Fixed) 8/22 Submitted to TCI	No	
96	D-17846	2739	Loan Doc Prep	[Loan Doc Prep] The spacing between the blue page title bar and the intro/body copy does not match global design specs. Spacing between these sections should always be 25px. Currently the spacing is 40px.	Requirement		8/13/2018		Pass	9/27/2018 Retest Pass (Closed/Fixed) 8/22 Submitted to TCI	No	
97	D-17845	2740	Session Ended	[Session Ended] Across all devices, the portal behaves inconsistently when users are inactive for 10 minutes. The portal often encounters extreme delays in generating the popup, and other times it never displays.	Requirement		8/13/2018		Pass	9/27/2018 Retest Pass (Closed/Fixed) 8/22 Submitted to TCI	Yes	
98	D-17844	2741	No Response	[No Response] The No Response pop-up is missing the X button to close in the upper right. All pop-ups in the Consumer Portal should have this X button that functions as a close.	Requirement		8/13/2018		Pass	1/24/19 Retest Passed 12/6/18 - Need to coordinate with IT to generate testing scenario	No	
99	D-17863	2742	No Response	[No Response] Font treatment for the body copy of the No Response pop-up is not correct. Currently, the font is treated as a subheader (bold, blue, larger font). This font should be formatted as body copy (black, 16pt) like all other standard	Requirement		8/13/2018		Pass	10/15/2018 RETESTS PASSED 10/3/2018 FAILED RETEST: Ensure the font color is #58595b, per	No	
100	D-17899	2748	Page 1	[Post Sync Issues] PAGE 1 The options in the Suffix dropdown are not correct.	Post		8/17/2018		Pass	9/13 Passed (Closed/Fixed)	Yes	
101	D-17899	2750	Page 2	[Post Sync Issues] PAGE 2 The options in the STATE dropdown are incorrect across all	Post		8/17/2018		Pass	10/18/2018 Passed Retests	Yes	

Step 13: Retesting

Once resolved by the vendor and sent back, each defect was marked as ready for retest. Using the same scenarios and test data from the original ticket, testers followed the replication steps to see if the defect could be reproduced:

- If the defect persisted, it was marked as a retest fail and the ticket was updated with new notes and screenshots, adding clarification for the developers
- If it could not be reproduced, it was marked as pass and all internal documentation as updated to reflect passed status.

Defects could be reopened at a later date if they occurred again.

Step 14: Post-Launch Improvements

Once all the significant defects were resolved, Marketing discussed post-launch improvements and began looking for updates to further refine and improve the UX.

Step 15: UAT Launch Plan

Nearing completion, the final step was developing the plan for a soft launch for user acceptance testing to a controlled subset of the customer base. This included confirmation of all working parts of the production environment.

SUMMARY

The project outlined above was a collaborative effort to develop a new origination system for the purpose of improving user experience and exploring innovative UI and back-end solutions to help grow the business.

By The Numbers:

- Total UI requirement docs: 35
- Total testing spreadsheets: 30
- Total defects tracked: 1,475

Skills Demonstrated:

- Project Management
 - Comprehensive UI and UX including:
 - Website content
 - Emails and print letters
 - Meta data, including HTML meta titles and URLs
 - Validation and error messaging
 - Logging defects and writing effective descriptions and replication steps
 - Instructional information for developers
 - Internal documentation
 - Written communication with leadership, vendors, and other business units
- Research and discovery
- Conversion optimization strategy
- Effective communication of complex UI issues with marketing leadership, developers, testing teams, and other business units
- Attention to detail
- Strategic thinking
- Problem solving
- Collaboration
- Leadership