



NAVIGATING

ELDER

CARE

NAVIGATING ELDER CARE

Expert Interviews, Cardsorts, Strategy

O'Connell Care at Home – a company that provides private at-home care for the elderly – distinguishes itself on being a thought leader and expert on elder care as it relates to both the Adult children, and the elders themselves. They really “get it”. They needed us to bring this part of their brand to their website because the adult children (often paying for their aging parents’ care) complained that they couldn’t find any of the information they were looking for.

The **goal for this project** was to create a website layout that made it easy for adult children navigate an often difficult and tumultuous time in their life by making resources and services easy to find.

Team

I collaborated with our creative director to run expert interviews, ran both open and combination card sorts, and provided insights to the designers for wireframes.

Process

Expert Interviews

Adult children are notoriously hard to interview as they are a self selected group that oftentimes don't identify as such, or know much about elder care until after an event that requires they find care for a parent. Additionally, current clients lack time for an interview as they're balancing, child care, family life, parent care and a full time job, while former clients find this topic difficult to discuss as they likely have lost a parent.

Seeking a variety of viewpoints, the creative director and I interviewed a Registered Nurse that interacts with adult children around their elders, and the COO of the company who has 7 years of experience shepherding adult children through this process. Through these interviews we distilled the main needs, concerns, and desires adult children have when looking for at-home elder care.

Cardsorts

Due to our small budget and timeline, I carried out two card sorts through optimalworkshop.com: hybrid and closed.

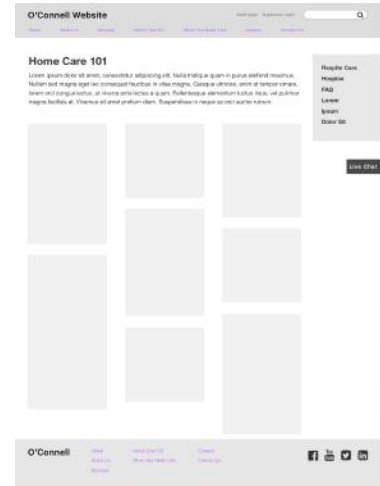
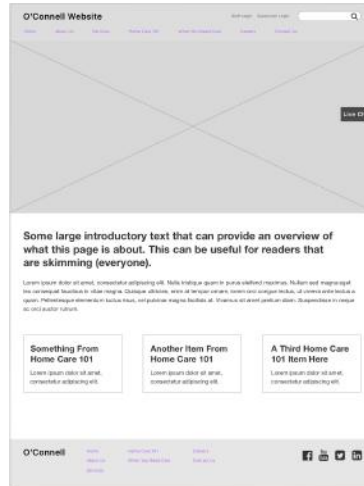
Before recruiting on the platform, I tested the hybrid cardsort on three co-workers that were unfamiliar with the project and fit the demographic criteria of adult children in order to tease out any issues in word-choice or any confusion. This also gave me some insight as to this group's mental models.

It became clear that adult children are looking for nuanced information at a difficult time in their life so separating the information by urgency – “before you need care” “when you need care” – was the most intuitive for this population.

Insights into Design

I discussed with the developer and designer on the account, and we agreed that typing up a content matrix would be the best way to begin the conversation, and to hash out details as they came up.

Section	Page	Template	Internal
1.0	Home Page	Home	1
1.0	About Us	About/Who We Are	1
2.1	Assessors and Accreditation	SS - Assoc. And Acc.	Internal Subpage
2.2	News & Updates (Blog website)	SS - Featured News & Updates	Internal Subpage
2.3	The Business	SS - The Business	Internal Subpage
2.3.1	Company Culture (What we do)	SS - The Business - The Culture	Internal Subpage
2.3.2	Our story (before we do it)	SS - The Business - Our Story	Internal Subpage
2.4	The People	SS - The People	Internal Subpage
2.4.1	Our Leadership Team	SS - The People - Our Leadership Team	Internal Subpage
2.4.2	Our Nurses	SS - The People - Our Nurses	Internal Subpage
2.4.3	Internal Address	SS - The People - Internal Address	Internal Subpage
3.0	Services	Services Main	Internal Landing
3.1	Guidance & Care Management	SCR - Guidance & Care Management	Internal Subpage
3.1.1	Geriatric Care Management	SCR - Guidance & Care Management - Geriatric	Internal Subpage
3.1.2	Needs Assessment	SCR - Guidance & Care Management - Assess	Internal Subpage
3.2	Home Care	SCR - Home Care	Internal Subpage
3.2.1	Health and Hygiene Support	SCR - Home Care - Health & Hygiene Support	Internal Subpage
3.2.2	Light Housekeeping	SCR - Home Care - Light Housekeeping	Internal Subpage
3.2.3	Companionship	SCR - Home Care - Companionship	Internal Subpage
3.2.4	24/7 Care	SCR - Home Care - 24/7 Care	Internal Subpage
3.3	Benefits	SCR - Benefits	Internal Subpage
3.4	Insurance	SCR - Insurance	Internal Subpage
3.5	Respite Care	SCR - Respite	Internal Subpage
3.5.1	24/7 over the phone assistance (weekends and holidays) - prior of mind		
4.0	Home care 101	Before You Need Main	Internal Landing
4.1	Introduction to Home Care	BYNC - Introduction to Home Care	Internal Subpage
4.1.1	What are the different types of home care?	BYNC - Introduction to Home Care - What are internal Subpage	
	Can I get short or long-term care?		
	Is home care a possibility for a parent or caregiver?		
	What kind of home care do I need?		
4.1.2	What is the difference between a licensed agency and a certified agency?		
4.1.3	What to expect from day 1	BYNC - Introduction to Home Care - What to internal Subpage	
4.2	How can I prepare for my parent's later years?	BYNC - Home Care - Prepare for my parent's internal Subpage	
4.3	How to start a conversation with my parents about home	BYNC - Home Care - How to start a conversation with my internal Subpage	
4.4	Category (and) from News/Blog		
	Assessment and guidance when you need it		
5.0	When You Need Care	When You Need Main	Internal Landing
5.1	What is the process of requesting home care?	WYNC - What is the process of requesting home internal Subpage	
5.1.1	How far in advance can I request home care?	WYNC - What kind of home care do I need? internal Subpage	
5.1.2	What kind of home care do I need?		
5.1.3	Can I get short or long-term care?	WYNC - What kind of home care do I need? internal Subpage	
	Does O'Connell require a minimum amount of services?		
5.2	Is home care a possibility with a parent on hospice?	WYNC - What kind of home care do I need? internal Subpage	
5.3	24/7 over the phone assistance (weekends and holidays) - prior of mind		
	Assessment and guidance when you need it		



Takeaways

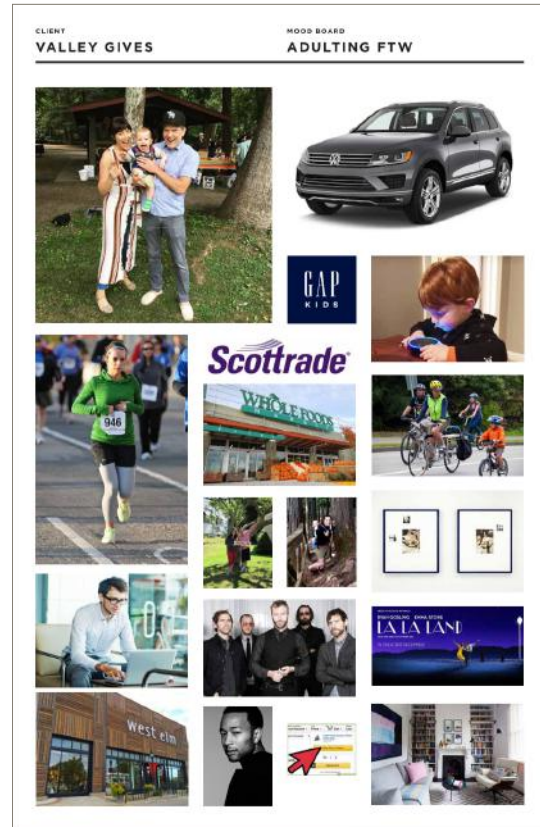
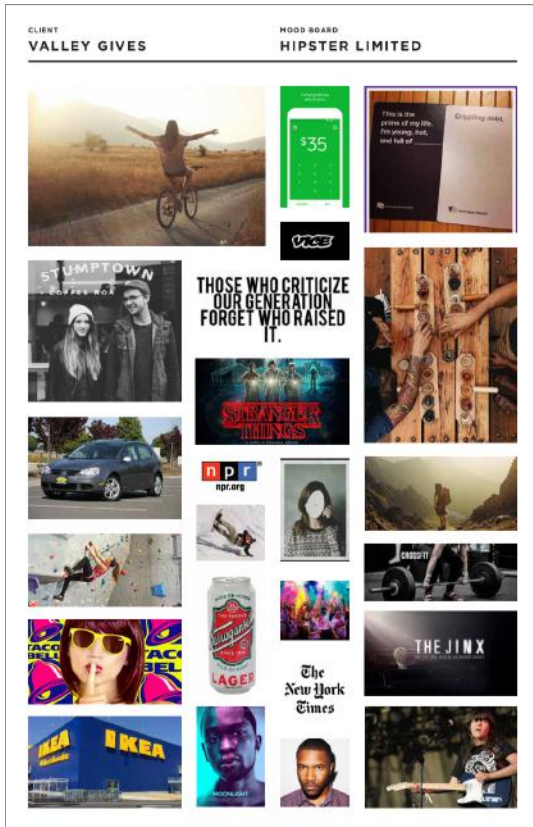
By working directly with experts in the field, we gained immediate “insider” knowledge on both the hard industry rules and regulations, and soft emotional component of elder care. This allowed us to approach this project with an empathetic and nuanced eye view of user needs. We emerged with a deep understanding for user needs, and a design that positions the company as an expert that “gets it” by laying out their webpage in a way that is attune to adult children’s emotional and practical needs.



**MILLENNIAL
STEWARDSHIP**

Persona Boards and Strategy

I translated the insights from the demographic and psychographic research to the design team, and collaborated to create persona mood boards. It became evident that given financial pressures and life stage, millennial engagement would best be focused around participation, volunteering and advocacy. Further, it highlighted the significance of cause alignment in consideration for later donations.



After additional investigation about millennial motivations and past "giving Tuesday" efforts we recommended our client create an event for millennials to connect with one another, be introduced to the breadth of causes impacted by the Community Foundation, and find other opportunities to engage with any participating nonprofits.

We created a cause-driven awareness campaign that would invite and encourage millennials to a Valley Gives sponsored event where they could get involved with local nonprofits before and for Valley Gives. We also ran a workshop on how to reach and engage a millennial audience for the nonprofits participating in Valley Gives.



Takeaways

Through the combination of primary and secondary research, we learned that due to millennials' life-stage, values system, and financial limitations, along with the political climate at the time, they would be most inclined to volunteer their time and respond to a community building experience—not necessarily be active donors. This insight allowed us to align the strategic efforts of our client with the needs and motivations of Millennials for a successful event and brand experience. Further, we were asked to lead a workshop presenting out findings for Valley Gives' 200+ participating non-profits. An analogous strategy was rolled out later that year on a national scale by Planned Parenthood.



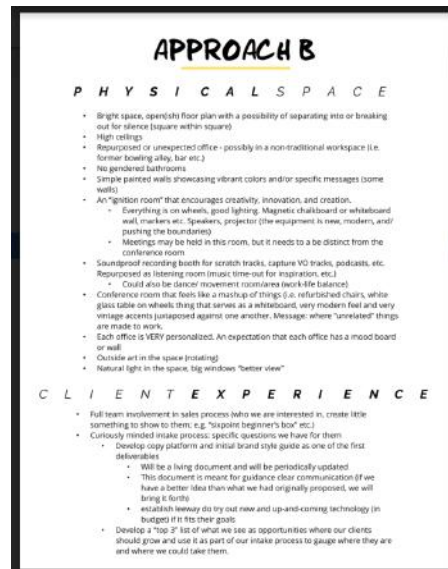
(RE)BRAND IDENTITY

Participatory design

After creating a report of the workshop overall, I worked with the creative director to iterate on recommendations that would achieve our three core principles and what that would look like in one versus another brand approach.

Final Product

We presented the founding partners with two recommendation reports as part of the rebrand presentation (we presented two approaches and they decided which one we would go with).



Each report outlined strategic recommendations for the physical space, client experience, culture, practices and events of each brand direction.

Outcomes & Takeaways

We have completed the visual rebrand and are in the process of rolling out some of the strategic recommendations outlined in the presentation. We have since built upon one of our original "event" recommendations and created a program for companies entering the "second stage".

*Stage in business lifecycle. Often between 10-100 employees, \$1m - \$50m in revenue, have hit a growth plateau, need to scale their business to be less dependent on the owner.



FAST

CASUAL

IN-STORE

EXPERIENCE

FAST CASUAL BRAND AUDIT IN-STORE EXPERIENCE

Interviews, In-Field Observation, Analysis, Brand Strategy, Implementation

*I can't present the specific findings and design recommendations due to NDA, but I can share the process.

This quickly growing fast-casual restaurant's brand had unintentionally warped over time, determined by short term needs over the last 10 years. The brand was in need of a "refresh" that established a clear tone and visual identity, embodied the future aspirations of the company while staying loyal to its roots, would improve upon current assets, and would rival national peers both in the eyes of their loyal customers, but also the markets they are looking to expand into.

The **goal for this project** was to clearly define the brand, identify opportunities for improvement/ any immediate needs, and codify the brand into a brand book with an eye towards repeatability and scale.

Team

I served as the research lead on this project. For this, I collaborated with one of the founding partners, the in-store managers and the regional manager during the discovery phase to recruit and coordinate in-store visits and interviews and gather their perspectives. I later collaborated with our creative and art directors to determine the relevance of existing assets and brand direction. Lastly, I teamed up with our CEO to narrow down and prioritize recommendations.

I also served as the client's acting marketing director and worked with the administrative team, interior designers, and contractor to build out the newest store to pilot the implementation of our recommendations and designs.

Process

To start, I met with the creative team to boil down what big questions would be during discovery. (1) What are the existing assets? Why do they differ between stores? How did that come to be? (2) What is the function and value of each asset? (3) How do these assets impact the customer experience?

In store visits:

In order to develop an understanding of how all of the factors come together, I spent a week visiting each of the stores documenting all assets and their purpose, interviewing managers, and observing customer behavior.

Observation

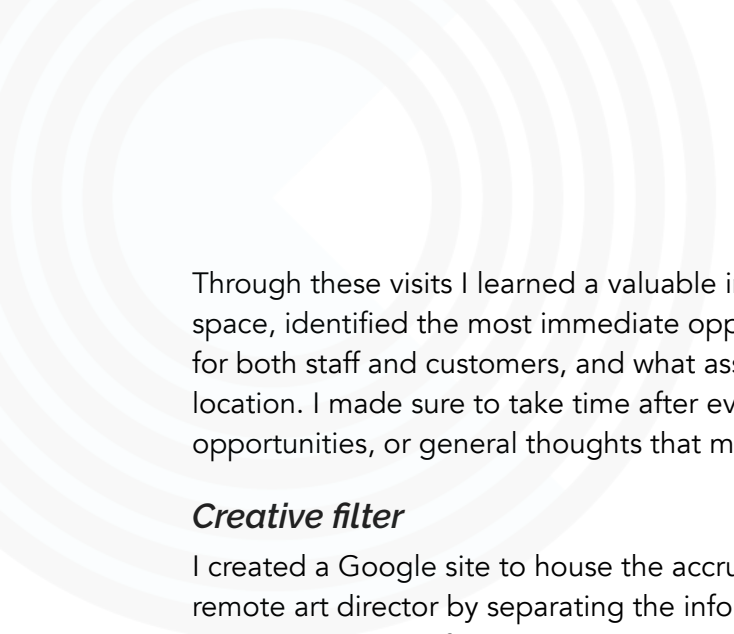
- Where do people spend their time the most? Why?
- Can the customers navigate the space fluidly?
- Opportunities for

Each item

- Store location
- Where in the store
- Asset type
- Asset purpose
- Does it have components?
- History/Notes
- Opportunities

Interviews

Can you tell me how you get marketing materials or any signs? Posters, communications etc?
Is there any messaging or anything that you've received that you really like or would like to see more of?
Where you could use some support or could see some growth?
Imagine you could wave a magic wand and have the ideal materials/ in-store layout. Can you describe it to me?
Can you tell me a little bit about your customers? Any trends?
What are the most common questions you get from customers?



Through these visits I learned a valuable information about the way customers navigate the space, identified the most immediate opportunities to elevate the in-store brand experience for both staff and customers, and what assets the staff feel the most pressed for in each location. I made sure to take time after every visit to document any patterns, patterns, opportunities, or general thoughts that may have surfaced during my time.

Creative filter

I created a Google site to house the accrued information to make it easy to share with our remote art director by separating the information into intuitive sections and including an interactive library of assets organized by category and store. At this point I met with our creative team to provide context as they graded each asset on the following measurements:

- On brand
- On Message
- Effectiveness

This process helped us determine which assets needed to be retired, fine tuned, or re-imagined all together.

Distilling Information

Once we factored in the creative evaluation to the insights from the in-store visits, it became clear that the most immediate threat/ opportunity to the brand would be the artifacts that impact in-store customer experience. Cognizant of the fact that our client would be undertaking in new store opening in the fiscal year we established the top two priorities he believed would have the most immediate impact, and laid the groundwork for the coming growth.

Implementation

I worked with the creative team to find best practices and real world examples of what we were looking to achieve to inform their design process. Shepherded discussion and creative review with client, and planned with regional director to ensure proper staff education around materials.