

## Jennifer Borchardt

[jborchardt@gmail.com](mailto:jborchardt@gmail.com) | (415) 706-8585 | [www.linkedin.com/in/jborchardt/](http://www.linkedin.com/in/jborchardt/)

### Executive Summary

I am a senior UX practitioner, leader, and strategist with over 20 years' experience in technology and financial services. I manage teams who deliver transformative best-in-class experiences and thought leadership at leading institutions. I am a frequent speaker and educator on product design, marketing, and user experience best practices and innovation.

### Recent Professional Experience

#### U.S. Bank – Vice President, Omnichannel Experience & Strategy – Wealth Management 2017-present

- Lead omnichannel UX design and strategy for wealth management business including brokerage, trust, robo-investing, and advisory services
- Manage multidisciplinary UX team, growing team from 3 to 20 practitioners across multiple locations delivering up to 40 active projects at a given time
- Develop and execute UX strategy for digital transformation of advisor and client-facing experiences:
  - Design responsive, mobile-first experience optimized for accessibility and SEO
  - Lead strategy to maximize effectiveness and usability of online and mobile applications for all client segments, from retail to ultra high net worth
  - Support digital platform migration to component-based architecture in Adobe Experience Manager
  - Create extensible and reusable design patterns, standards, and component library
- Led research and workshops to develop wealth management personas and journey maps for advisors, product managers, and marketing stakeholders
- Align UX, business, and technology objectives through design artifacts (e.g., wireframes, interactive prototypes), and strategic roadmap and requirements planning
- Influence enterprise product design strategy and UX practices including: service design, user-centered design, lean UX, and design thinking methodologies
- Integrate user research and competitive analysis to inform UX strategy and execution
- Oversee selection and management of design, research, and technology vendors
- Drive innovation by piloting new technology and methodologies to transition to Agile, increase operational efficiency, improve speed to market, and optimize resource allocation

#### Wells Fargo – Vice President, Digital Innovation Strategy 2016-2017

- Led discovery, research, and long-term strategic vision engagements with customer experience, product management, business, technology, and innovation teams
- Created interactive augmented reality, mobile apps, and connected car concepts of future-state financial services applications
- Planned and facilitated design thinking workshops and co-creation sessions with cross-functional teams
- Managed and delivered user research & competitive analysis
- Wrote RFPs and oversaw procurement and management of design, research, and technology vendors
- Managed relationships with internal stakeholder teams, affiliates, and external agencies to ensure alignment with enterprise strategy and vision, standards, governance, and delivery milestones

#### Wells Fargo – Vice President, Studio Lead 2013-2016

- Led customer experience strategy and execution for iOS and Android mobile banking apps; aligned user experience with concurrently developed brokerage, retirement, and health savings mobilization programs
- Oversaw portfolio of over 120 customer-facing wealth management, banking, and brokerage projects
- Supervised team of 40 designers, producers, and content strategists across the United States

- Coordinated with business, technology, and regulatory partners to align multi-channel customer experience strategy with stakeholder teams' requirements
- Developed and led talent acquisition, training, knowledge management, communications, project management, and managerial accounting
- Managed UX design vendor engagements through vendor selection, statement of work definition, and deliverable review & approval

**Wells Fargo – Assistant Vice President, Senior Interaction Designer**

2005-2013

- Led user experience strategy for integrating Wells Fargo Investments and Wachovia Securities brokerage applications. Created use cases, user personas, user journeys, and prototypes
- Defined and executed user experience strategy as UX lead for large-scale online banking projects and programs. Responsibilities included facilitating workshops with project stakeholders, managing resources and budget, and formalizing UX team's role in QA testing
- Managed relationships with business, digital product management, technology, and compliance teams and develop user experience strategy for Wells Fargo Investments, including all information architecture and user interface design. Key projects: Trust Online applications, self-directed online brokerage platform, and Wells Fargo Advisors end-to-end integration experience, options trading and research, and tax lot trading
- Managed vendor relationships for large-scale digital projects, including: a fully-automated system for adding custom images to debit and credit cards (the design for which I was granted a patent), credit card rewards, and institutional retirement platform
- Led UX execution and process improvement through design forums, training curriculum development, and artifact standardization
- Managed authenticated session standards program. Responsibilities include authoring standards, managing reviews, and creating governance process
- Developed training program in user-centered design methodologies for UX team and partners
- Defined and championed brand, UX, and accessibility standards
- Developed UX business case by quantifying positive impact of user experience enhancements to company's revenue, customer satisfaction, loyalty & net promoter scores, and competitive industry rankings

**E\*TRADE Financial Corporation – Senior Information Architect**

2004-2005

- Led re-architecture of internal CRM applications from text-driven terminal-based interface to GUI-driven web-based tools
- Facilitated product definition by translating business requirements into mockups, interactive HTML prototypes, system architecture diagrams, and wireframe schematics
- Designed online and desktop applications for active traders and high-net worth clients, resulting in cost savings of over \$1 million/year in licensing fees and 95% retention rate of highest value clients
- Established and managed standards for information architecture, user interface, front-end development, and visual design

**E\*TRADE Financial Corporation – Lead Producer, International**

1999-2004

- Oversaw front-end production of 14 international websites and managed relationships with partner financial institutions
- Supervised and trained cross-functional teams of designers, developers, and QA testers in international offices
- In-country principal for international projects. Managed end-to-end development including: front-end design & development, information architecture, legal and compliance reviews, testing, and documentation of business requirements and functional specifications
- Reduced time needed for product definition and development cycle from six months to eight weeks

- Led digital application development, research, resource management, and business expansion in EMEA markets
- Established consistent branding and user experience across all international sites by creating development & localization standards, code library, and style guide
- Designed and implemented proprietary internal project management application that resulted in average 30 percent reduction in length of product development cycle

## Skills

### Professional Skills

- Team leadership, communication, facilitation, analytical problem solving, research, project management, product design, collaboration
- User-Centered Design, Design Thinking, Service Design, Lean UX
- Agile Project Management
- Operational knowledge of major U.S. and European financial markets and U.S. financial regulations

**Software & Technical Skills:** InVision, Sketch, iRise, Adobe CC (Photoshop, InDesign, Illustrator, Dreamweaver), Visio, Omnigraffle, Confluence, JIRA, Microsoft Suite (Word, Excel, PowerPoint, Project, Access), HTML, XML, CSS, JavaScript, SQL

## Education

**University of Illinois** (Urbana, IL)

M.S., Library and Information Science

**Oberlin College, Bachelor of Arts** (Oberlin, OH)

B.A. Neuroscience, Biopsychology

**University College of London** (London, England)

Economics (Thesis: Economic Study of the National Health Service)

## Certifications & Patents

**Stanford University Institute of Design** (Stanford, CA)

Design Thinking Bootcamp

**Massachusetts Institute of Technology** (Cambridge, MA)

IAP: Relational Database Management System and Internet Application Programming

**United States Patent No. 15896.0054US01**

“User Interface-less ATM”

**United States Patent No. 15896.0189US01**

“Notify Customers of Financial Threats at ATM or Merchant”

**United States Patent No. 8628008**

“System and Method for Customizing Cards ”

**Financial Industry Regulatory Authority (FINRA)**

2000-2017

Series 7 (General Securities Representative)

Series 63 (Securities Business Transactions)

Series 24 (General Securities Principal)

## Teaching and Speaking Engagements

**Argyle Customer Experience Leadership Forum** (San Francisco, CA)

Speaker, “Understanding and Enabling Customer Success”

**Argyle CMO Forum: Marketing in the Digital Era** (San Francisco, CA)

Panelist, “The Data-Driven Marketer”

**GDS Digital Innovation Insight Summit** (Cancun, Mexico)

Speaker, “Creating Partnerships for a Digital Experience Strategy”

**Argyle CMO Financial Services Forum: Marketing & Technology Innovation** (San Francisco, CA)

Panelist, “The Relationship Between Consumers and Financial Services: How to Adjust Your Marketing Strategy”

**GDS Omnichannel Insight Summit** (Sarasota, FL)

Speaker, “Optimizing Digital for Omnichannel - A Digital Transformation Case Study”

**Argyle Customer Experience Leadership Forum** (San Francisco, CA)

Facilitator, “Strategies for Reducing Churn and Improving Customer Retention”

**Design Thinking Roundtable – SAP Korea** (Seoul, South Korea)

Facilitator, roundtable discussion on developing and applying design thinking methodologies with

**UX World 2017 Conference** (Seoul, South Korea)

Speaker, Creating an Innovation Culture – Case Study

**Finance Tech World 2015 Conference** (Seoul, South Korea)

Speaker, Designing Innovative Mobile Experiences

**Bentley University Graduate School of Business** (San Francisco, CA)

Corporate Mentor, User Experience Leadership & Management Capstone Project

**University of Illinois Graduate School of Library & Information Science** (Urbana, IL)

Guest Lecturer, Applied Methodologies in Human-Computer Interaction

**Bentley University Graduate School of Business** (San Francisco, CA)

Guest Lecturer, Applied User Research

**Face of Finance: Designing Usable Financial Systems** (Waltham, MA)

*Produced by Bentley University User Experience Center*

Panelist, Using Customer Research to Create Financial Experiences