

# Rene Zelaya - Portfolio

## Thrivent Life Insurance – Journey Mapping & Strategic Research

Company: Thrivent Financial  
Role: Senior UX Researcher  
Timeframe: 2021–2024  
Methods: Generative interviews, journey mapping, FigJam stakeholder alignment, surveys, feature prioritization, UX testing, cross-functional workshops  
**Context & Challenge**  
Thrivent Financial, a legacy institution with a strong client base in financial services, was working to modernize its life insurance application process. At the time, the process was largely manual—stacked paperwork, in-person signatures, or notary appointments—and digital experiences were fragmented across agency-built tools with little backend integration.

While product managers focused on short-term execution, and designers were being used more like graphic resources than strategic thinkers, I noticed there was no clear shared understanding of our users or their end-to-end experience. Without this foundation, design and product efforts were often misaligned. I built a research program to uncover the real customer journey and define a strategic north star.

### Approach

- I launched a journey mapping project with the support of my PM and enthusiastic backing from the design team. This began with:
- Stakeholder Alignment: Facilitated a FigJam session with product, ops, service design, fulfillment, and legal teams to document knowns, unknowns, and assumptions.
  - Knowledge Mapping: Clustered assumptions and knowledge gaps to identify priority questions and where answers could come from (users, legal, operations, etc.).
  - Deep-Dive Interviews: Conducted in-depth interviews to trace users' full life insurance journeys from initial decision-making to post-approval communication.
  - Persona Distinction: Identified two key paths—those with existing financial relationships who added insurance organically, and those navigating the journey independently online.
  - Hybrid Expectations: Found users valued choice—some wanted a fully digital experience, others preferred human connection. But both expected low-friction options.
  - Embedded Mixed Methods: Followed qualitative research with targeted surveys and feature prioritization to validate behavioral insights and counter stakeholder skepticism.

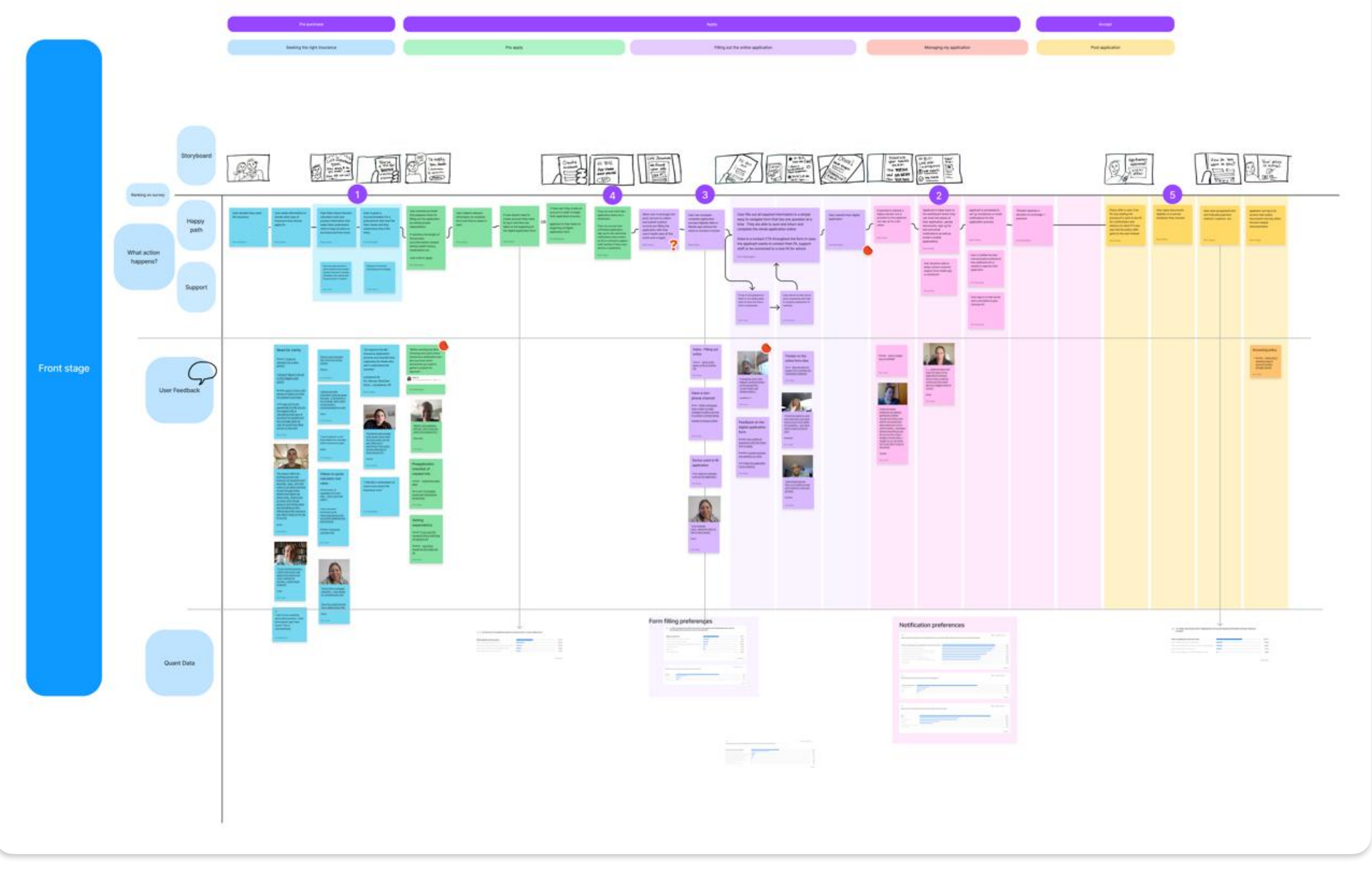
### Key Insights

- Internal assumptions underestimated users' willingness—and preference—for digital self-service.
- Customers with preexisting financial relationships made life insurance decisions far earlier than assumed; excluding younger participants from studies skewed our understanding.
- The biggest pain point across roles (clients, FAs, fulfillment) was waiting—often for communication that never arrived.
- Users wanted proactive updates via their preferred channels (SMS, email, app)—not phone calls from unknown numbers.
- Designers felt disconnected from product direction. By looping them into interviews and testing sessions, I helped them reconnect to user needs and regain clarity.

### Outcomes

- Created a rich journey map embedding survey data, qualitative quotes, and user video clips—making research accessible and emotionally resonant.
- Used the map to contrast the current vs. ideal state, aligning stakeholders on pain points and a product north star to build towards
- Empowered my PM to reframe roadmap discussions using research-backed priorities.
- Helped designers make faster, better decisions with confidence in user needs and expectations
- Provided a scalable research framework that balanced immediate delivery with long-term vision.

[Link to project on personal website](#)



## Spectrum News App – Local News Consumption Research

Company: Charter Communications  
Role: UX Researcher (Contract)  
Timeframe: May 2021 – Oct 2021  
Methods: Generative interviews, mobile ethnography, photo journaling, behavioral survey, feature prioritization workshops, concept testing

### Context & Challenge

Charter Communications wanted to create a unified mobile experience for local news. Although it owned a network of affiliate stations across the U.S., there was no standardized platform that integrated these stations or addressed modern user behaviors. The team needed to understand how people consumed local news across devices and locations—and what emotional and practical roles local reporting played in daily life.

### Approach

I led an exploratory, mixed-methods research initiative to surface behaviors and needs around local news consumption. My process included:

- In-Context Mobile Interviews: Participants guided me through their homes and routines using their phone cameras. I collected contextual data about where, when, and how they consumed news
- Quantification: I developed a follow-up survey to measure how widespread these behaviors were, validate multi-location tracking, and identify device preferences across key user groups.
- Feature Prioritization & Early Concept Testing: Collaborated on prioritization activities with stakeholders, then ran initial concept tests with users and journalists to validate feasibility and categorization logic.

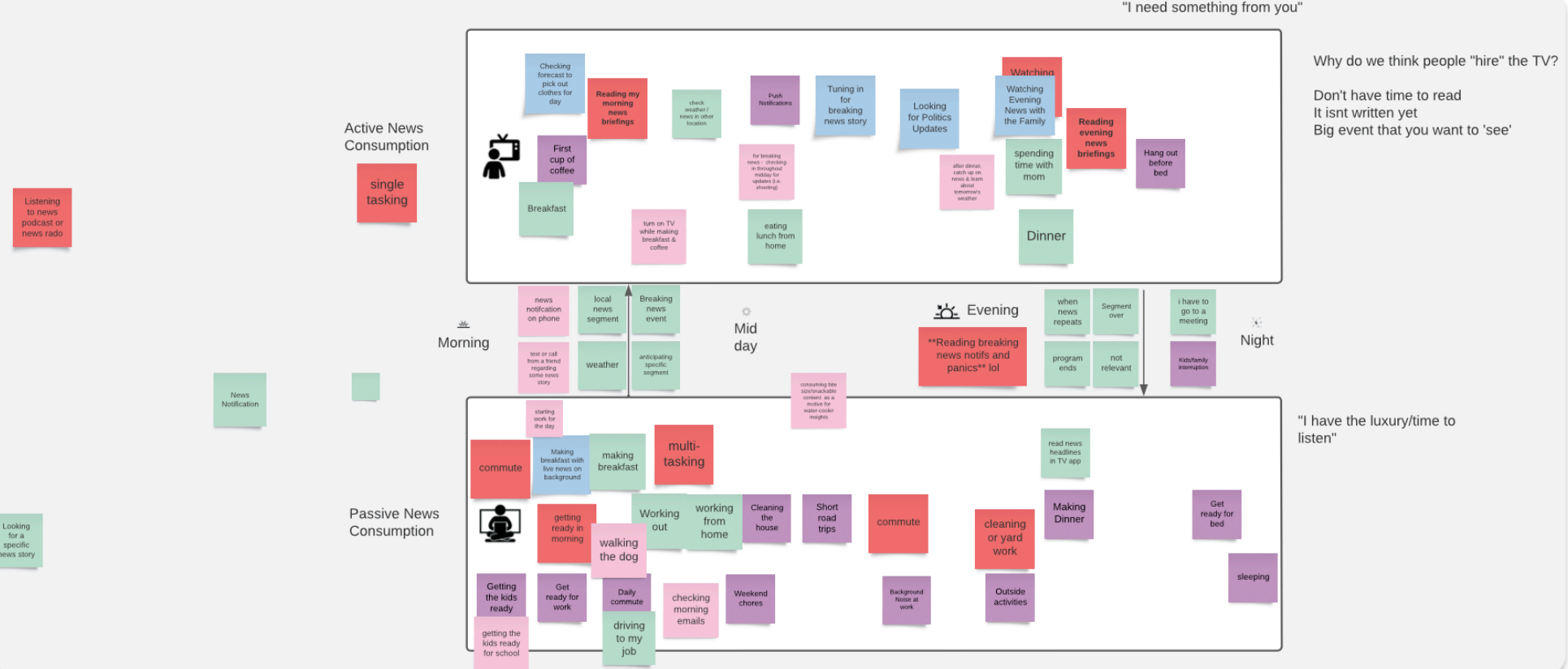
### Key Insights

- Local news consumption is tied to personal identity, nostalgia, and care for others—not just geographic location.
- Users consume news across multiple devices and in ambient ways, often not even facing the screen.
- The assumption that users would only follow news from their current ZIP code was incorrect; emotional context mattered more than geography.
- Passive consumption environments (e.g., while cooking or working) demand accessible, low-friction content formats.

### Outcomes

- Reframed assumptions about local news from being purely location-based to emotionally driven and identity-based.
- Informed a multi-year product roadmap, including support for customizable geolocation, multi-location tracking, and cross-device access.
- Delivered strategic recommendations that emphasized real-life consumption contexts (e.g., passive listening, multi-device use) to guide future content and feature decisions.
- Presented key findings to stakeholders across product and content teams, helping reframe early design assumptions and align on user needs.
- Provided foundational data that supported feature prioritization and concept testing in later development phases.

(no link to project. It was 6 months and when I left it was still under NDA so I couldn't post about it)



## Clarabridge Voice of the Customer Dashboard and NLP Categorization Model

Company: LogMeln  
Role: UX Researcher – Customer Experience  
Timeframe: 2019–2021  
Methods: Observational research, workshops, card sorts, NLP model development, sentiment analysis, VOC dashboarding, NPS correlation

### Context & Challenge

LogMeln supported over 17 products across global markets, but customer feedback was scattered across multiple touchpoints—support calls, satisfaction surveys, and post-interaction forms. While we had access to this data, teams lacked a unified way to extract insights, surface trends, and tie sentiment to actionable product changes.

The company had recently implemented Clarabridge, a non-generative AI platform that used natural language processing (NLP) to analyze customer service call transcripts. My challenge was to design a system that would make this data usable at scale: helping teams track product-level sentiment, identify emerging issues, and ultimately improve customer satisfaction.

### Approach

This initiative included an international research sprint at our Costa Rica support center, where I led a team of three UX researchers over a three-week field study. We were supported remotely by a lead researcher who helped with executive buy-in and synthesis.

### Key steps included:

- Generative Field Research: Shadowed frontline agents across support tiers to understand how issues unfolded in real-time, identifying opportunities to structure unstructured call data.
- Workshops & Mapping Sessions: Facilitated group sessions where agents documented every recurring customer issue. Using whiteboards and sticky notes, we mapped issues by severity and resolution path—self-serve, agent-level, or escalated.
- Card Sorts & Language Modeling: Captured how customers described each issue in their own words. We conducted card sorts to cluster variations and validate terminology across support groups.
- Model Building & Sentiment Tuning: Created a classification system for the NLP engine, based on customer language patterns.
- VOC Dashboard Development: Helped design a set of interactive dashboards that integrated all customer feedback sources (voice transcripts, surveys, in-product forms). Dashboards allowed stakeholders to move from a global NPS view down to individual product-level sentiment themes.

### Key Insights

- Models performed dramatically better when trained on customer phrasing vs. internal jargon.
- Mapping issues by escalation path helped surface the root causes that most impacted NPS.
- Product teams were more engaged when insights were visual, drillable, and tied to feedback language that matched what their users actually said.

### Outcomes

- Delivered a centralized dashboard accessible to UX teams, product managers, and CX leadership across 17 products.
- Enabled teams to move from global sentiment trends to product-specific breakdowns, linking NPS scores to specific issues and support documents.
- Contributed to a 12% reduction in support call volume through better product fixes and more effective knowledge base content.
- Created a replicable framework for integrating multi-source feedback into strategic planning.
- Deepened company-wide appreciation for the value of early AI-powered tools in UX research—grounding machine analysis in real, qualitative context.

[Link to Project on personal website](#)

