

VIRTUAL PORTFOLIO REVIEW

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CAPITAL ONE



Originally From **All Over**

 India

 Malaysia

 Spain

 Singapore

 Costa Rica

 Mexico

 Nebraska

 Canada



Now in San Francisco

*"My parents said 'be whatever you want.'
So I went to clown school."*



CLOWN SCHOOL

Certified. Actually.



UMD THEATER

Acting & directing



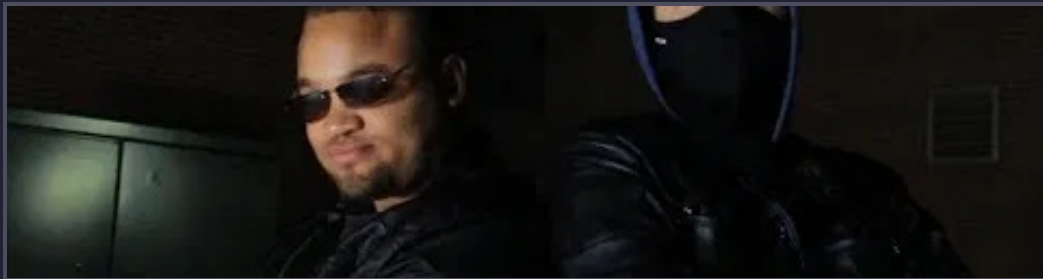
FILM & ADV

Directed, wrote, produced



VIDEOGRAPHY

An excuse to showcase
people I cared about



 **Director** — Badass Ninja 3: The Sequel to the Prequel



 **Performer** — Shockfactor Entertainment

HORRORQUEST

Built a *live-action Halloween game* at UMD.

It got *too successful*. Only *questionably allowed*.

A professor caught me. Offered a choice:



"Expelled... or work for me."

I took the deal...



From Contextual Design to **Ensu**



TOOK THE DEAL

The professor connected me with Karen Holtzblatt — the inventor of Contextual Design.



FELL IN LOVE WITH RESEARCH

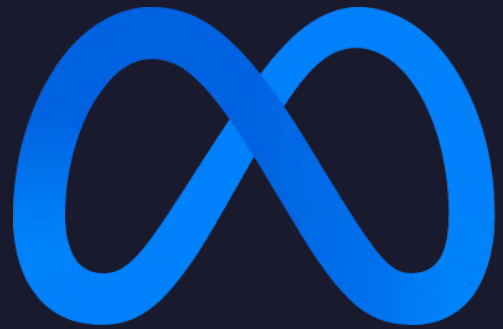
Mentored at InContext Design. Discovered the instinct that made HorrorQuest work — reading people — was a superpower in UX.



ENSU — 0 → \$1M

Moved to San Jose. Mental health startup. Built the research practice that powered a \$1M raise.

Then the **Big Ones** Called



Meta

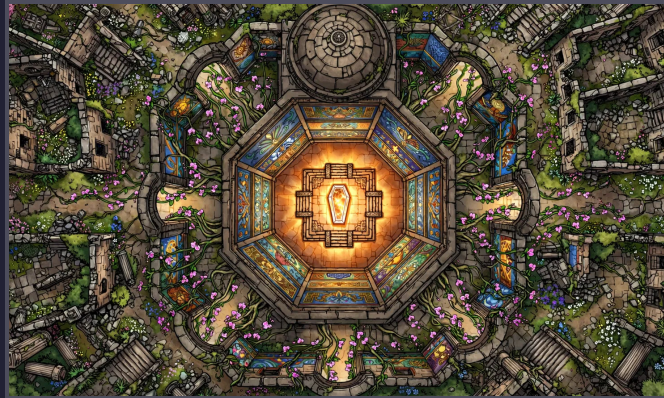


Off the Clock in **SF**



PHOTOGRAPHY

Volunteer body-image work



D&D CAMPAIGN

Homebrew world-building with an obscene amount of AI.
(Built my own Agentic Harness just for my campaign)



LARP / EVENT DESIGN

SAGA: Court of Seasons — immersive events for SF clubs

Today's Agenda

1

Meta — Creator Identity

The narrative-types framework: +2%
D30, +11% sharing

2

Ensu — Retention Crisis

The silent failure loop: 7% → 23%
D30 retention

TWO CASE STUDIES · ONE RESEARCH PRACTICE

Creator Identity: From contradictory signals to a validated strategic framework

A mixed-methods approach to finding the missing variable behind creator-tool adoption.

SITUATION

Creation volume rose while native tool use fell; sampled content revealed **repost inflation**.

TASK

Identify a segmentation model that explained creator needs and could guide **product investment**.

ACTION

Natural-context research, journal study, cross-functional synthesis, NLP clustering, and **N=500 validation**.

RESULT

20 hypotheses became **12 validated identities**, a 4/6/2 strategy, and +2% young-adult retention.

CASE STUDY 1 ROADMAP

Meta • Creator Identity

How the story will move from a misleading metric to a validated platform strategy.



PAGES 13–16

SITUATION

Creation rose while native tool use fell; sampled content exposed repost inflation.



PAGES 17–18

TASK

Find the missing variable and make it useful for **segmentation and investment**.



PAGES 19–28

ACTION

Natural-context diary research, AI-assisted synthesis, human audit, and **N=500 validation design**.



PAGES 29–36

RESULT

Validation produced **12 identities**, revealed how they stack, and unified three research streams into deliverables, strategy, outcomes, and reflection.



SITUATION

The dashboard measured output, not creator intent.

Creation rose. Native tool adoption fell.

The top-line metric looked healthy; the behaviors underneath pointed in the opposite direction.

CONTENT CREATION

+12%

Weekly posts increased across the eight-week trend.

All five tracked native tools declined

Trim, text and captions, voiceover, remix, and templates fell between -2.5% and -11.8%.

WHY IT MATTERED

More content did not mean stronger ownership of creation. Reels risked becoming the **distribution endpoint**—not the tool of choice.



I created awareness and empathy... (made a nuisance of myself)

A structured Data Science pull made the pattern credible; a gamified standup ritual built shared intuition.

01 · VALIDATE

Built a sample with rigor

- 1

Frame
Lock the eligible Reels population and observation window before viewing.
- 2

Pull
Data Science generates the review set—no hand-selected examples.
- 3

Evaluate
We constructed an **agentic classification skill** to determine whether each sample was created on-platform, reposted, or uncertain.

SIGNALS USED BY THE AGENTIC SKILL

-  Origin: watermark
-  Edits: cuts, filters
-  Audio: native vs. imported
-  Class: native, repost, uncertain

Guessing exposed assumptions; the reveal gave the team a shared pattern language.

02 · ENGAGE

Brought the findings into stand-up

"Ours—or theirs?"

Watch one Reel and lock in two guesses before the reveal. **Closest calls win small prizes.**

GUESS 1 · ORIGIN

Created with our tools—or first made on another platform?

GUESS 2 · POPULARITY

More popular on Reels—or on the original platform?

-  Watch
-  Guess
-  Reveal
-  Reward
-  Interpret

The volume metric hid what people were actually doing

SITUATION

~95%

of sampled videos were edited or posted on another platform first.

Creation was rising—but Reels was often the **distribution endpoint, not the creation tool.**

Approximate finding from sampled content review.





TASK

We had parity so why didn't we have stickiness

The platform was broad – but underspecialized

TASK

STRATEGIC GOAL

Tailor native tools to **outcompete TikTok and other platforms** on a small number of strategically valuable creator segments.

QUESTION 1

Which segments have the highest strategic value?

INPUTS

Viewership analytics and platform consumption patterns.

ANALYSIS

Cross-referencing creator output against audience demand.

OUTPUT

Target segment definition based on measurable business value.

QUESTION 2

Which segments can we realistically convert?

INPUTS

Switching behavior and competitive use against TikTok/Shorts.

ANALYSIS

Assessing friction and the strength of existing external habits.

OUTPUT

Conversion probability for each high-value segment.

QUESTION 3

Which tools matter to each winnable segment?

INPUTS

Feature requirements for filters, effects, cuts, and audio syncing.

ANALYSIS

Mapping specific native tool adoption to creator intent.

OUTPUT

Strategic prioritization framework for product investment.



ACTION

Move from observed behavior to a validated identity framework.

I owned tool fit and cross-question synthesis

ACTION

RESEARCHER 1

Audience definition

Focused on answering: **Who** are our creators?

RESEARCHER 2

Creator motivations

Focused on answering: **What** are they trying to achieve?

MY OWNERSHIP

Tool fit & Synthesis

I led the investigation into **how our tools fit those goals**, and synthesized all three streams into a single strategic framework.

Conventional segments failed to predict tool choice

ACTION

THE DEAD END

Existing variables like **demographics** and **content genre** showed almost no correlation with feature preference. A 20-year-old comedy creator and a 40-year-old comedy creator often needed entirely different tools.

THE PIVOT

We needed to find the **missing variable** that actually drove creation behavior.

EXISTING VARIABLES DON'T PREDICT FEATURE PREFERENCE

AGE VS. TOOL

$$R^2 = 0.04$$

No predictive power

REGION VS. TOOL

$$R^2 = 0.07$$

No predictive power

GENRE VS. TOOL

$$R^2 = 0.11$$

Weak correlation

FOLLOWERS VS. TOOL

$$R^2 = 0.09$$

No predictive power

Method Diary Study Contextual Inquiry

Instead of assigning a lab task, the protocol followed naturally occurring creation moments and reconstructed the decisions behind them.

N=25→10

PURPOSEFUL SAMPLE



Active creators

At least 1 post per week



Convertible maturity

Mostly beginning–mid stage



Platform spread

Varied creation ecosystems



Domain diversity

Mixed creator categories

Demographic mix

Women, men, varied profiles

STUDY CADENCE

WEEK 1

7-day diary

Capture natural creation

Participants documented real, self-initiated creation on whichever platform they chose.



Log each creation moment

Platform, objective, setting, and trigger.



Record immediately afterward

A video walkthrough captured process, choices, and friction while fresh.



WEEK 2

Contextual interviews

Reconstruct the workflow

Interviews used each participant’s own Week 1 artifacts as concrete prompts.



Replay diary artifacts

Walk through actual decisions—not generalized recall.



Probe the end-to-end process

App switching, workarounds, goals, and unmet needs.

EVIDENCE CAPTURED



Diary entries

Moment-level context



Self-recorded videos

Immediate reflection



Interview transcripts

Decision reconstruction



Cross-platform journeys

Workflow and switching

AI proposed the structure; researchers retained judgment

The workflow accelerated a quote-level affinity analysis while keeping interpretation, category boundaries, and final synthesis under researcher control.

ANALYSIS PIPELINE

01

Build the corpus

SOURCE MATERIAL

- Combined **diary entries**, **post-creation videos**, and **interview transcripts**.
- Kept participant and source context attached to each observation.

02

NotebookLM assist

FIRST-PASS SYNTHESIS

- Generated **participant-level summaries** across the full evidence set.
- Surfaced recurring concepts and candidate patterns for researcher review.

03

Agentic Miro plugin

QUOTE-LEVEL PLACEMENT

- Converted individual quotes into **digital post-its**.
- Proposed placement into the team's **predefined research categories**.

04

Human audit

INTERPRETATION & SYNTHESIS

- Researchers reviewed every cluster, **re-sorted misplaced evidence**, and challenged weak groupings.
- Merged, split, and refined categories into the final affinity structure.

WORKING ARTIFACT

Agent-proposed affinity map

Each post-it represented one quote or observation. Placement was a recommendation—not a final coding decision.

CONTRIBUTION	PRESENTATION	PRODUCTION
"I want to explain what I know."	Need data visible on screen	App switching friction
Teaching / expertise signal	Clarity over decoration	Reusable visual formats
Moved after audit	Structure the argument	Tool workaround

Researcher quality controls

Audit placements

Accept, move, or reject

Merge / split

Refine category boundaries

Re-sort evidence

Resolve category overlap

Compare cases

Test patterns across N=10

DECISION RULE AI accelerated organization; **researchers owned interpretation, exceptions, and the final category model.**

We mapped the things they valued and wanted to present

The natural creation record showed that creators organized their work around what they contributed, not which tool they used or category they occupied.

WHAT THE LONGITUDINAL EVIDENCE REVEALED

01 Contribution came before production
Creators described **presenting knowledge, talent, perspective, or a subject**; tool operation was secondary to that intent.

02 Genre concealed shared motivations
A gaming creator and a beauty creator could share the same presentation identity—even when their content categories looked unrelated.

03 Segmentation needed a new unit
We proposed decoupling **who the creator believed they were** from the genre of the content they produced.

EXAMPLES OF THE SLIDES WE CREATED

INSIGHT SLIDE

Presenting, not "making"

Natural moments recast creation as contribution.

"I'm bringing what I know to the audience."

IDENTITY HYPOTHESIS

My Knowledge

SIGNAL Teach, explain, clarify

NEED Make information legible

TOOLS Text, structure, evidence

WORKFLOW / FRICTION MAP

Capture > Edit app > Publish

⚠ App switching to hold data, text, and structure on screen.

Mapped needs to specific product opportunities.

N=10 · 2 weeks

DISSEMINATION SCHEDULE

GATE 01

Research audit

Core research team

Affinity map + evidence table

Validate clusters and exceptions.

✓ Approve findings for readout

GATE 02

Leadership readout

Product + Design leaders

Insight deck + identity hypotheses

Establish shared language.

✓ Sponsor broader validation

GATE 03

Hypothesis workshop

Product · Design · Marketing

20 proposed elements

Review hypotheses for testing.

✓ Approve validation plan

GATE 04

Broader shareouts

Wider org + stakeholders

Additional research plan

Design the validation phase.

✓ Expand research scope

Creator identity—not genre— explained tool needs

ACTION



We had to decouple the creator from their creation.

A creator's identity—what they are presenting to the world—dictated their tool requirements far more accurately than the genre of content they produced.

I built the framework with its future users

ACTION



DATA SCIENCE

Partnered to ensure the **survey design** could be properly factored and that the resulting clusters were statistically sound.



PRODUCT

Collaborated to align the emerging identity elements with **actual tool capabilities** and the upcoming product roadmap.

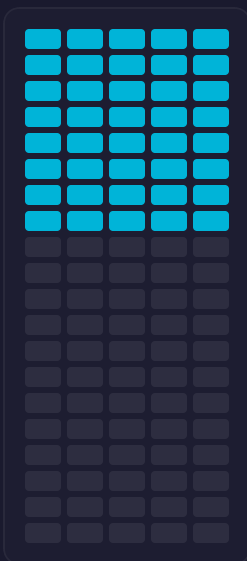


MARKETING

Ensured the language and framing of the identities resonated with **external creator communications** and acquisition strategies.

Survey Design: Planned Missingness

ACTION



8 Assigned Elements

Randomly selected per user

12 Unseen Elements

Omitted by design

→ Each person answers **40 questions** (~8-10 min)

100

FULL INSTRUMENT

40

PER PERSON

60%

MISSINGNESS

SAMPLE

500 Active Creators

SELECTION

≥3 Reels in last 30 days

Stratified by genre, follower tier, frequency, and platform

All profiling from platform metadata.
All tool usage from behavioral logs.
Zero self-report beyond identity items.

🎁 \$10 gift card • ~8-10 min • Internal creator panel

40 questions instead of 100 — planned missingness lets us build the complete picture from incomplete individual views

Survey Analysis: From Partial Data to Validated Framework

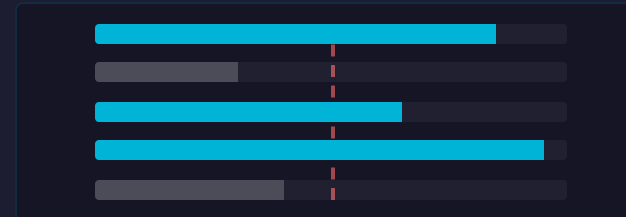
RESULT



1. Recover Covariance

FIML METHOD

- **Input:** partial data from 500 people →
Output: complete 100×100 correlation matrix.
- Yielded **74 co-ratings per pair** (Graham threshold is 30-50).



2. Blind EFA

PROMAX ROTATION

- Promax (oblique) used because creators hold **avg 2.4 identities**.
- Conservative loading threshold set at **0.50** (standard is 0.40).
- Parallel analysis determined factor count.



3. Result Funnel

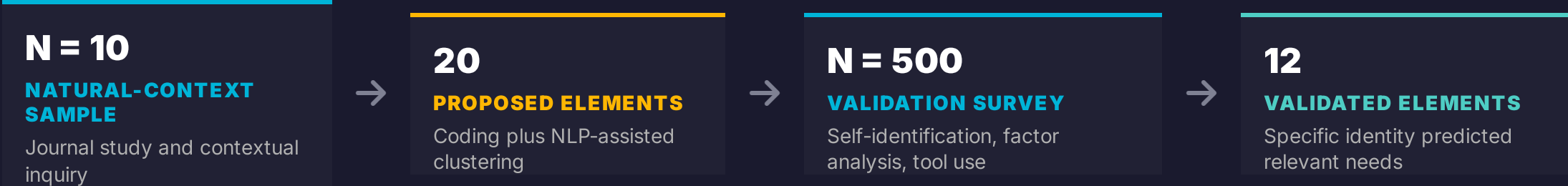
VALIDATED ELEMENTS

- **8 didn't survive** — proof the test was real and hypotheses were rigorously challenged.
- Remaining 12 form the final framework.

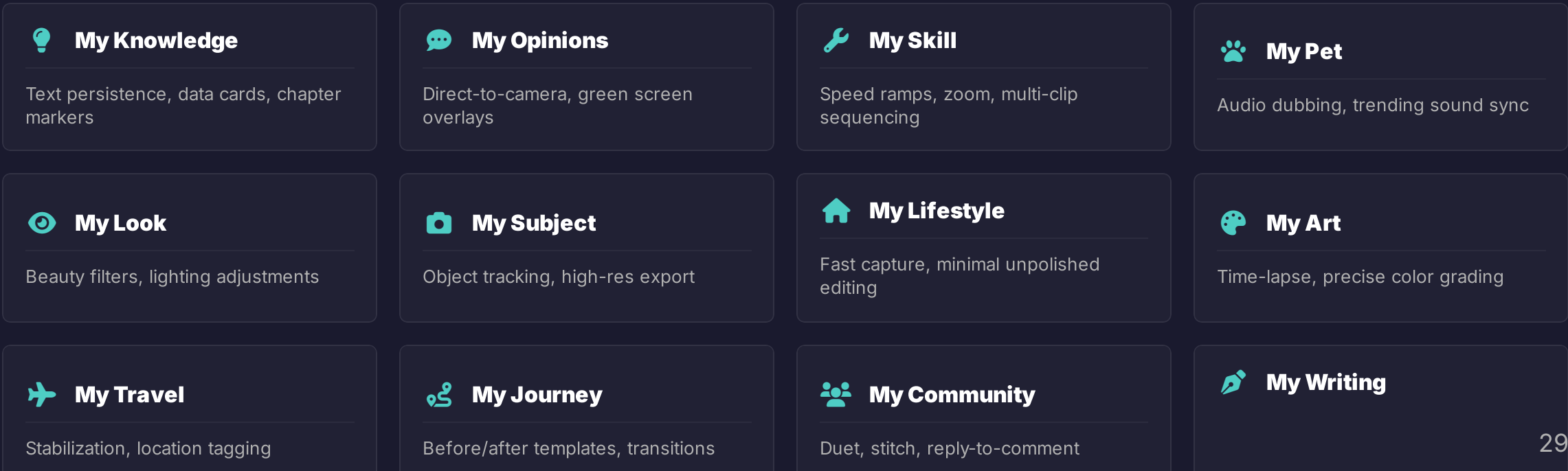
Genre R^2 = 0.03 – 0.07 ✗ → Identity elements → tool adoption ✓ → **THIS IS WHY IDENTITY REPLACED GENRE**

The validation pipeline turned identity into a measurable framework

RESULT



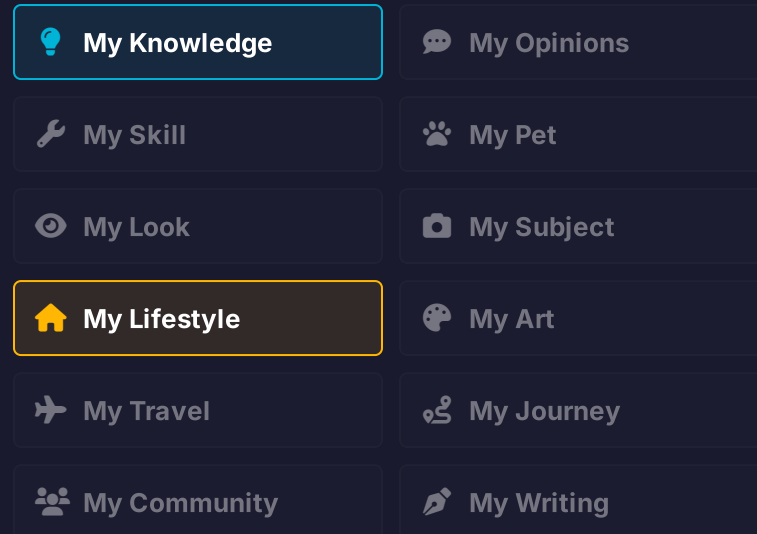
THE 12 VALIDATED IDENTITIES & PREDICTED TOOL NEEDS



Identities don't exist in isolation—they stack

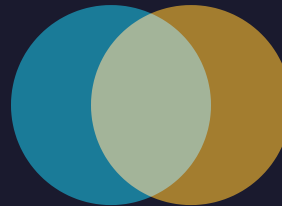
INSIGHT

THE 12-ELEMENT PALETTE



2.4

AVG IDENTITIES / CREATOR



Creators mix and match elements from the palette to form their unique presentation stack.

HOW STACKING DRIVES NEEDS



Sarah's Content

GENRE: PERSONAL FINANCE

HER IDENTITY STACK

My Knowledge

My Lifestyle

Resulting Tool Requirements

- ✓ **Data overlays & text persistence** to explain financial concepts (Knowledge).
- ✓ **Fast, unpolished vlog capture** to show her daily spending habits (Lifestyle).

Because she holds both identities, an app that only supports highly polished text overlays will fail her when she needs to capture a quick daily vlog.

TOOL ADOPTION ISN'T DRIVEN BY A SINGLE LABEL—IT'S DRIVEN BY THE INTERSECTION

Identity turned three research streams into one decision model

RESULT

THE THREE QUESTIONS

Q1 • Value

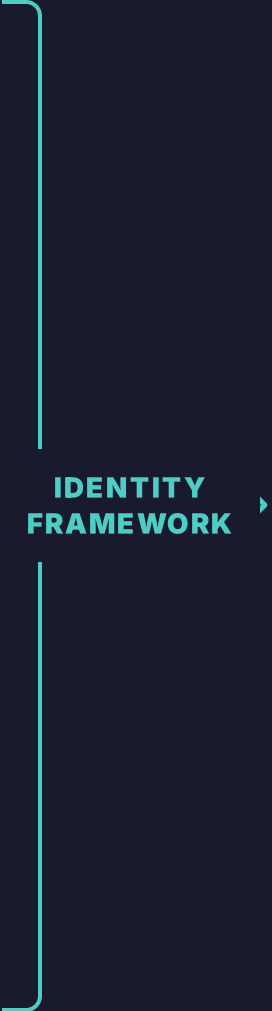
Viewer Demand
Tracking which content types audiences actually wanted to watch.
→ WHO MATTERS

Q2 • Competition

Competitive Position
Mapping adoption, satisfaction, and switching friction vs. TikTok.
→ WHERE WE CAN WIN

Q3 • My Stream

Tool Differentiation
Mapping tool usage and feature gaps per identity element.
→ WHAT TO BUILD



THE DELIVERABLES

01

Identity Element Cards

- Definition & behavioral signals
- Tool usage & capability gaps

12 validated creator profiles.

02

Strategic Tiering Matrix

- High demand (Q1)
- Winnable from competitors (Q2)

The 4/6/2 Focus strategy.

03

Tool-Identity Mapping

- Ties identity to specific features
- Pressure-tested by PMs

Direct roadmap prioritization.

04

Marketing Translation

- Target profiles & messaging
- Aligned to creator self-concept

Co-built during working sessions.



RESULT

Turn research into platform strategy and measurable outcomes.

Leadership used the synthesis to make a strategic prioritization decision

RESULT

4 FOCUS

 Knowledge

 Opinions

 Skill

 Pet

STRATEGIC RATIONALE

My Knowledge

High demand for learning. Tool gaps (text persistence) highly addressable to build natively.

My Opinions

Drives massive sharing. Tool needs (green screen) are lightweight and suit mobile-first capture.

My Skill

High re-watch rates. Tool gaps (speed ramps) directly solved the friction of app-switching.

My Pet

Won key segments (women 30+). Audio-centric needs (dubs) fit platform's existing strengths.

→ Actively recruit and build dedicated tools

6 NEUTRAL

 Look

 Subject

 Lifestyle

 Art

 Travel

 Journey

STRATEGIC RATIONALE

Solid incidence across the platform, but these identities were not driving core conversion or were already well-served by existing toolsets.

→ Maintain support, but do not prioritize new feature development

2 DISCOURAGE

 Community

 Writing

STRATEGIC RATIONALE

My Community

Deprioritized due to negative strategic impact. These were often political or rallying posts that tended to incite conflict on the platform.

My Writing

(Sketch Comedy / Scripted) Required complex, professional-grade desktop video editing tools that were already cornered by YouTube.

→ Deliberately deprioritize; stop building edge-case tools



"I Am Presenting My Knowledge"

18%
of creators

0.76
factor loading

FOCUS
strategic tier

Showing how to do something — beauty, fitness, cooking, finance, DIY. Demonstrating, instructing, breaking things down.

VIDEO FORMATS

Talking Head

Explaining concept on camera

Tutorial

Guided process walkthrough

Step-by-Step

Numbered sequential instructions

Behind the Scenes

The process behind a result

TOOLS THEY NEEDED

Clarity tools, not flashier effects

1

Step / Chapter Markers

Break content into numbered sections within a Reel

2

Persistent Text Overlays

Text stays on screen for a set duration

3

Callout / Highlight Boxes

Arrows + boxes pointing to specific parts of frame

4

Data / Stat Cards

Template for showing a number + label for credibility

5

Pinned Source Links

Attach sources directly to the video

PARTICIPANT VOICE · P3

“

"I'm presenting what I know about how to do this specific thing. The video is just the delivery method."

Skincare / beauty creator · 47K

PARTICIPANT VOICE · P7

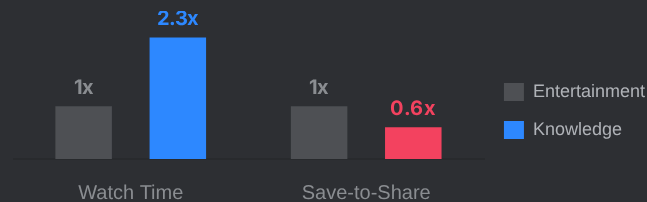
“

"I need a stat to stay on screen for eight seconds while I explain it. So I'm in CapCut building text layers like it's a PowerPoint—for a 60-second Reel."

Personal finance creator · 112K

SUPPORTING DATA

Sanjay (2024) — Educational Content Study

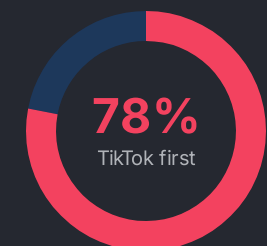


THE PLATFORM GAP

78% of Knowledge creators were editing on TikTok first

Driven almost entirely by one missing feature: timed text placement.

The creators driving the most valuable engagement were the ones most likely editing somewhere else.



The framework broke down silos and drove measurable original creation

RESULT

ORGANIZATIONAL IMPACT



A Common Strategic Language

Smoothed conversations between Research, Marketing, and Outreach—teams that historically didn't collaborate closely.



Cross-Functional Model

The marketing partnership (highly unusual for the research org) became the internal model for cross-functional work.



Creator Recruitment & Retention

MEASURABLE OUTCOMES

+2%

D30 Retention
Among young adults

+11%

Sharing & Following
Across key segments

THE STRATEGIC THESIS PROVEN

≥90% → ~40%

Educational & Skill reposts dropped massively.
By building the exact tools these identities needed,

Rigor means challenging your own method

RESULT · REFLECTION

“

*A framework is only as strong as the **blind spots** you actively hunt for.*



LEANER SURVEY DESIGN

500 was generous and 8 elements per person meant 40 questions when 5 would have worked. Next time: leaner on both axes, put savings toward qual follow-up.



FORCE CO-OWNERSHIP

I would have brought Data Science into the qualitative coding phase so they understood the nuance behind the variables they were factoring.



TRUST THE QUALITATIVE SIGNAL

When the dashboard contradicted behavior, we spent too long trying to fix the query before going out to talk to users.

Retention Crisis: From a collapsing metric to a new onboarding architecture

A triangulated approach to diagnosing and fixing a product failure under extreme time pressure.

SITUATION

D30 retention collapsed from 20% to 7% while **four variables changed at once**.

TASK

Isolate the root cause quickly and rigorously without lowering the **evidence standard**.

ACTION

Cohort tracing, rapid survey, and guided activity interviews with **churned and new users**.

RESULT

Replaced clinical forced-choice with **guided discovery**, recovering retention to 23%.

CASE STUDY 2 ROADMAP

Ensu • Retention Recovery

How the story moves from a collapsing metric to a user-designed onboarding architecture.



PAGES 39–40

SITUATION

D30 retention collapsed to 7% while **four variables changed at once**.



PAGES 41–43

TASK

Isolate the root cause quickly and rigorously without lowering the **evidence standard**.



PAGES 44–53

ACTION

Cohort tracing, rapid survey, and guided activity interviews with **churned and new users**.



PAGES 54–58

RESULT

Recovered retention to 23%, then turned the crisis response into **always-on research infrastructure**.



SITUATION

Retention collapsed while four variables changed at once.

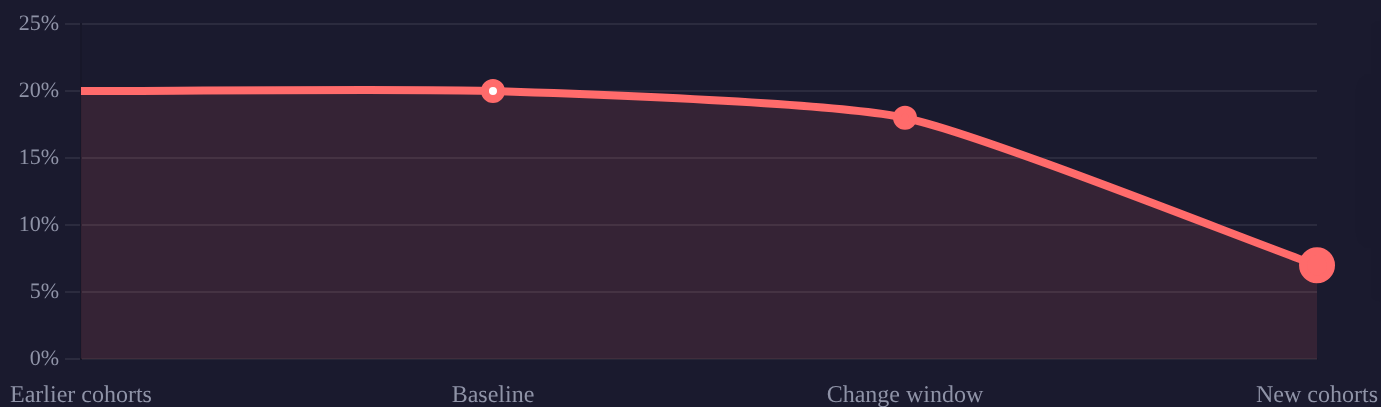
ENSU — ML-POWERED MOOD TRACKING, LINKING MUSIC TO MENTAL HEALTH

The Retention Cliff

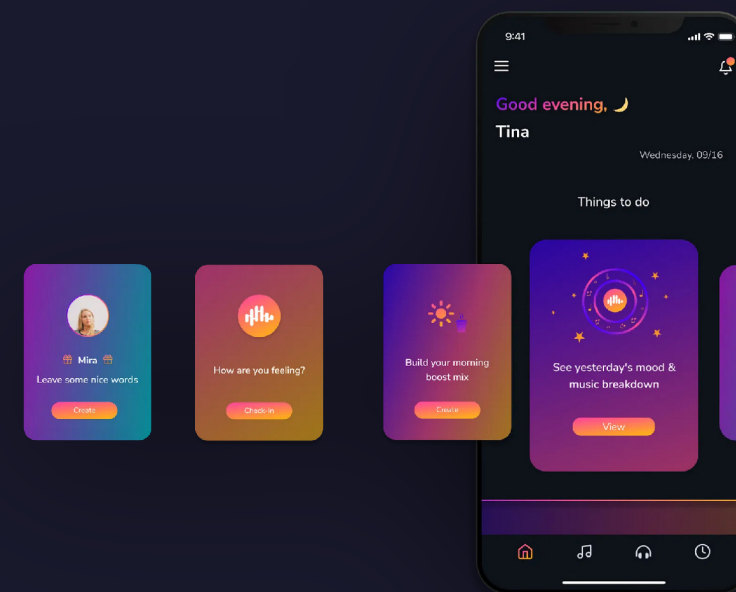
Six months in, the metric that determined whether the company could keep building collapsed.

20% → 7%

D30 retention · 65% decline



THE ENSU LATERAL INTERFACE



⚠️ If we cannot diagnose and fix this drop, we lose funding.



TASK

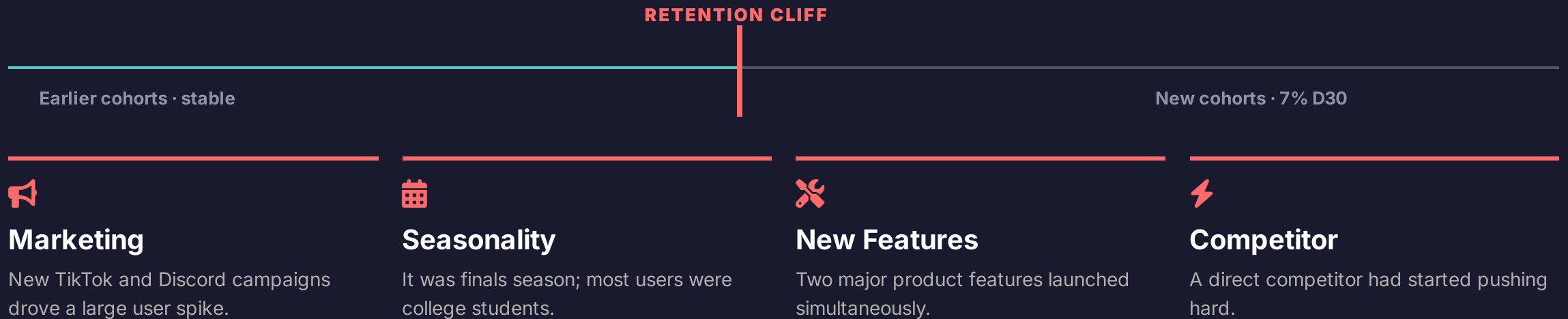
Isolate the cause quickly without lowering the evidence standard.

MY FIRST MOVE · MIXPANEL COHORT TRACING

Tracing the Drop

I segmented the full user base by acquisition date and followed each cohort through D1–D30 before choosing a research method.

The break was precise: users who onboarded after one mid-month date dropped; earlier cohorts remained healthy.



Startup resources were limited. I could not chase all four — **I needed to narrow fast.**

What Can We Practically Do — And When?

Twelve research questions, sequenced so each phase could only be designed after the previous phase answered its questions.



Each phase answered a subset of questions — and determined whether the next phase was needed.



ACTION

Let independent methods reduce different uncertainties.

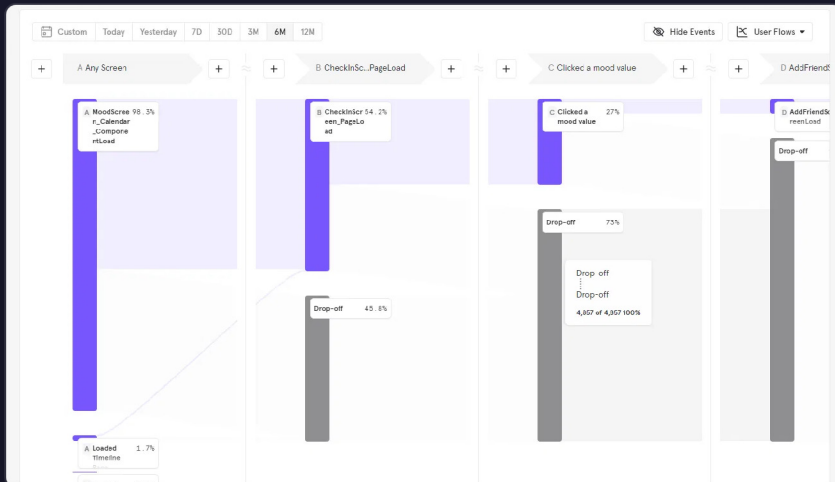
PHASE 1: METHOD

Mixpanel Cohort Analysis

THE EXECUTION

 Segmented full user base into four cohorts by acquisition date.

 Tracked each cohort's D1-D30 funnel progression side by side.



DIAGNOSTIC QUESTIONS

Are users taking different actions during week 1?

NO

Are the **distributions** of those actions different?

YES

Is the **order** they take actions different?

YES

Are any orders/actions correlated to long-term retention?

YES

Three Signals in the Data



The Drop Was Cohort-Specific

- Retention decline isolated to users who onboarded after a specific mid-month date.
- Earlier cohorts completely unaffected — same product, same features, different outcome.
- This is a **temporal** finding: something changed in that window.



Same Actions, Different Distributions

- New-cohort users were doing the same things as retained users — same features, same actions.
- But engagement concentrated heavily in one feature instead of spread across four.
- The signal wasn't in what they did — it was in the **pattern** of how they did it.



Sequence Correlated with Retention

- The **order** users engaged with features predicted whether they stayed.
- Certain paths through the product led to retention; others led to churn.
- This wasn't random — specific sequences were reliably associated with long-term engagement.

"I could see the pattern shift. I couldn't see **why** it shifted. Was this because marketing brought in different people? Or because the product was changing the experience?"

That question — external vs. internal — became the trigger for Phase 2. →

PHASE 2: METHOD

Rapid Churn Survey

Targeted in-app survey deployed to approximately 600 users in the isolated cohort, triggered as they exhibited churn behavior.

~600

USERS TARGETED

137

COMPLETED RESPONSES

22.8%

RESPONSE RATE

THREE-SECTION STRUCTURE

Demographics

5 Qs

Establish who these users are and whether they differ from the baseline audience.

Churn Reasons

15 Qs

Structured elimination of external acquisition factors versus internal product causes.

Open-Ended

2 Qs

Capture blind spots and explanations outside the predefined hypothesis space.

Thank goodness we included that picture of our company cat in the outreach...

The Right Users, the Wrong Assumptions



The Audience Did Shift

Survey demographics revealed a measurably different user profile from the new marketing channels.

Same age range and interests, but significantly less **mental health vocabulary and domain familiarity**.

Not the "wrong" users — but a different profile than the app's language and structure were designed for.



Near-Zero Feature Awareness

When asked "Which features are you aware of?"

1.3

CHURNED USERS

3.4

RETAINED USERS

They weren't rejecting features. They didn't know the features existed. The gap was awareness, not satisfaction.



External Causes Eliminated

The structured questions systematically ruled out the other three hypotheses:

- ✗ **Competitor:** <5% mentioned alternatives.
- ✗ **Seasonality:** No correlation with academic calendar.
- ✗ **Marketing quality:** Same intent and interest level as organic users — just lacked domain vocabulary.

The problem was confirmed internal.

We knew **WHO** had shifted. We knew they weren't finding features. We knew it was the product, not the market.

But we didn't know the mechanism — HOW was the product failing them? Phase 3 →

Guided Activity Interviews

12 USERS **60** MINUTES EACH | Two groups, two protocols — because churned users and new users held different kinds of evidence.

GROUP A

Churned Users

6 participants



Warm-up & Context

Demographics, mental-health relationship, and how they found Ensu.

10m



Retrospective Walkthrough

Recount onboarding step by step: what they saw, chose, and skipped.

20m



Usage Reconstruction

Rebuild the daily pattern: what opened, how often, and when use stopped.

20m



Moment of Decline

Identify when engagement dropped, what changed, and what felt missing.

10m

GROUP B

New Users

6 participants



Warm-up & Context

Demographics, mental-health relationship, and expectations from marketing.

10m



Live Onboarding

First-time onboarding with think-aloud reactions, confusion, and choices.

20m



Guided Feature Exploration

Eight Mixpanel conversion tasks to observe where discovery breaks down.

20m



Reflection & Comparison

Compare expectations from the acquisition message with the real experience.

10m

How the Product Was Failing

Four findings from observation and retrospection that surveys and analytics couldn't reach.

↶ 1. The Preference Paradox

Every user **said** they preferred the new lateral layout's freedom over the old directed flow.

But behavior showed the opposite: users chose one feature to get past the screen and never explored further. The directed flow had created a habit loop. The lateral flow broke it.

You can't get this from a survey (stated preference) or analytics (behavior). You need both side by side.

⚠️ 2. Clinical Intimidation

Watching live onboarding revealed the **exact moment** language became a barrier.

Terms like "sentiment" and "cognitive patterns" caused visible hesitation. The audience shift (Phase 2) + clinical language = users retreating to whatever felt safest.

The survey told us who was affected; the interviews showed the moment it happened.

⚓ 3. First-Feature Anchoring

The first feature didn't just become their favorite — it became their **concept of the entire app**.

"I thought it was a mood tracker." The mental model narrowed at first contact and never expanded.

Users can't report this in a survey because they don't know their mental model narrowed.

🚪 4. The Satisfied Exit

Churned users consistently described feeling **finished, not frustrated**.

High satisfaction with their primary feature. Zero awareness there was more. They weren't leaving the app — they were leaving what they thought the app was.

The most dangerous kind of churn: no complaints, no friction, no signal in support tickets.

The product had created a **silent failure loop**: unfamiliar language (2) pushed new users toward one safe feature (3), the lateral layout let them stay there (1), and they left satisfied they'd seen it all (4). No complaints. Just a quiet exit.

I knew the what, who, and why. The obvious fix — revert to the old flow — wouldn't work. Slide 46 →

Shifting from Diagnosis to Solution

The obvious answer was to revert. The evidence showed we needed a genuinely new model.

OLD MODEL Directed Structured · rigid · clinical - Designed for the original audience, already fluent in mental-health concepts. - Created a habit loop, but removed agency and carried the language problem forward. - Reverting would still fail the newly expanded audience. LESS BAD ≠ GOOD	CURRENT MODEL Lateral Open · unstructured · overwhelming - Every feature available at once, with no clear reason to explore beyond the first choice. - First-feature anchoring narrowed the product to whichever feature users encountered first. - Users left feeling finished—the app succeeded too narrowly rather than failing outright. AGENCY WITHOUT ORIENTATION	THIRD MODEL To Be Co-Designed Structure without rigidity - Establish one clear value anchor before asking users to choose. - Give structure while preserving meaningful agency. - Use accessible language without patronizing experienced users. - Make discovery a natural progression—not a forced march. DISCOVERY WITHOUT CHAOS
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SHARED READOUT · EMERGING FINDINGS HAD BEEN SOCIALIZED THROUGHOUT

Research Framed the third-model challenge and the remaining unknowns.	Marketing Strategy stays; help rewrite copy in language new users actually use.	Engineering Not a revert—a new onboarding model, co-created before handoff.
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Do not guess the third model. Build it with the users who showed us the problem. PHASE 4 · CO-DESIGN →

Co-Design Sessions

5 SESSIONS 2 PARTICIPANTS 90 MINUTES

Each session paired **one mental-health-aware user** with **one user without prior vocabulary** — **the same audience split the product now needed to serve.**

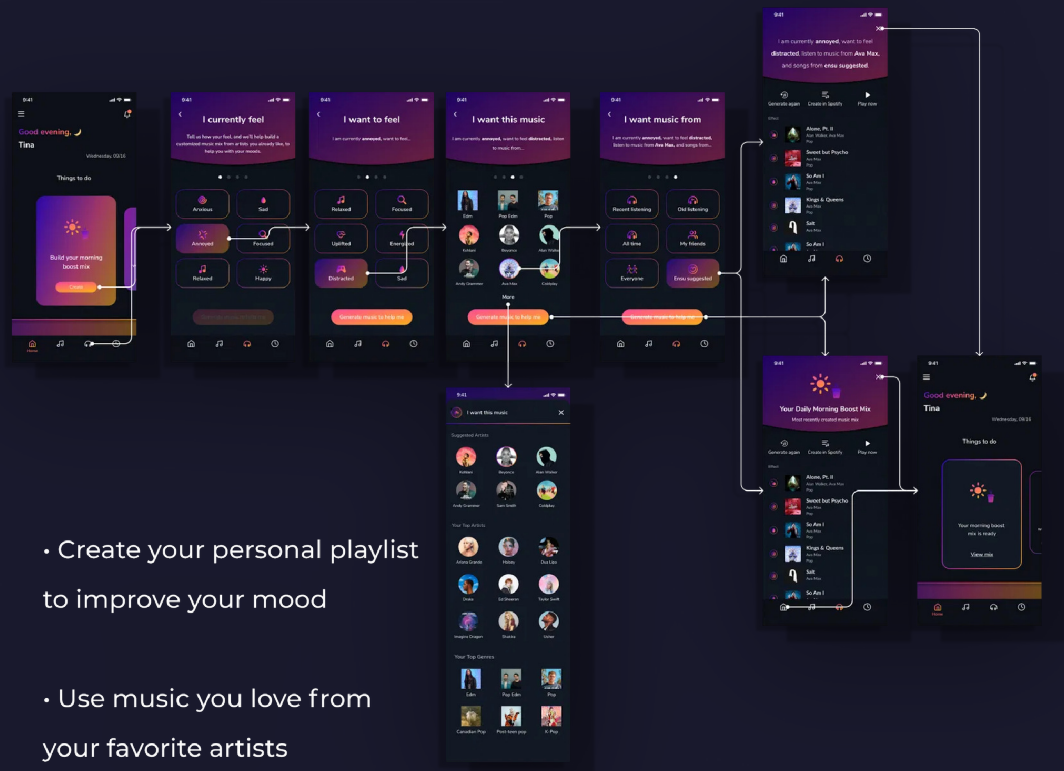
SIX-PHASE PROTOCOL

01 Warm-Up & Shared Context10m Each participant described their relationship with wellness in their own words, exposing the vocabulary gap while creating shared ground. 	02 Peer Translation Exercise20m The aware user explained Ensui and all four features; the unaware partner questioned what did not land. I captured exact language. 	03 Feature Sequencing Card Sort15m Pairs arranged feature cards in the order a new friend should experience them, reached consensus, and explained their reasoning. 
04 Vocabulary Generation15m Participants renamed each clinical feature using words they would text to a friend; agreements and disagreements were retained. 	05 Concept Walkthrough20m Pairs walked through a rough paper prototype of their sequence and vocabulary, narrating what a new user would think and feel. 	06 Closing Reflection10m Each participant answered: "What would have kept you using this app?" and "What almost made you leave?" 
 Participant-Led Collaboration The pair built on each other's explanations; the facilitator created space rather than supplying answers.	 Cross-Functional Observers Engineering and marketing attended sessions 2–5, took notes, and routed questions through the facilitator.	 Rolling Synthesis Affinity map updated after every session. Patterns stabilized by session 3; sessions 4–5 confirmed and refined them.

PHASE 4: ANALYSIS

What Users Designed

Users designed a deferred-choice onboarding flow — explore first, commit later.



 **Guided Intent:** Replaced the lateral dashboard with a step-by-step emotional sequence.

 **Integrated Outcome:** Connected mood-tracking directly to the playlist generation.

THE VOCABULARY

CLINICAL (BEFORE)

USER LANGUAGE (AFTER)

"Toolbox"

"Compass"

"Sentiment"

"Mood Predictions"

"Cognitive Patterns"

"Your Patterns"

"Therapeutic Playlist"

"Your Mood Mix"

"Mental Health Assessment"

"Quick Check-in"

DESIGN PHILOSOPHY

"More horoscope than medical chart"



RESULT

Turn a precise diagnosis into a user-designed recovery model.

The Third Model

12 days

PROBLEM IDENTIFICATION → ENGINEERING HANDOFF

Not a revert. Not a tweak. A new onboarding architecture built from user-generated design.

✗ Directed rigid → ✗ Lateral chaotic → ✓ Guided Discovery structured agency

Guided Discovery

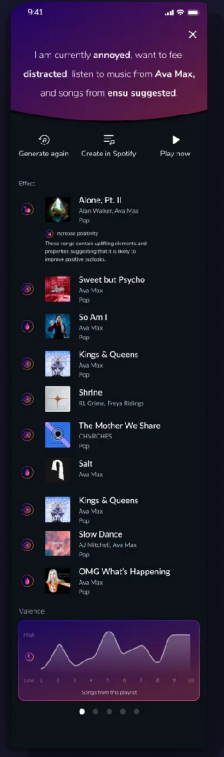
Start with one clear proposition—**“this is what the app is for”**—then reveal paths as confidence grows.

User-Generated Language

Clinical terminology was replaced with phrases participants used to explain the product to each other.

Progressive Disclosure

Features unlock as users engage, reducing first-session overload while ensuring ecosystem discovery.



THE OUTCOME

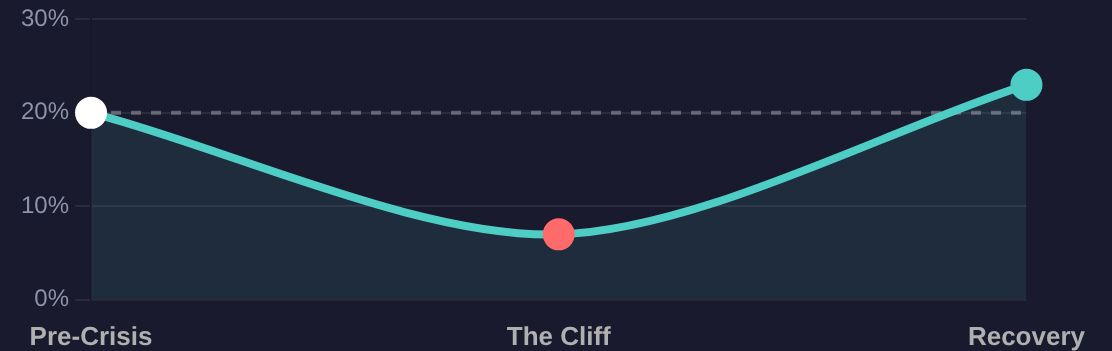
Impact & Reflection

7% → 23%

| Exceeded the original 20% baseline by 3 points.

-  **Rapid Execution:** 12 days of research, 1 week of engineering.
-  **Business Goal:** Made the investor deadline with a clear recovery narrative.
-  **Strategic Shift:** The "Unaware" persona became a permanent part of the user model.
-  **Lasting Practice:** Usability test battery became a standing weekly practice.

D30 RETENTION RECOVERY



What I'd Do Differently

Better demographic data earlier

I would have identified the new "Unaware" persona sooner if we had captured better context during the initial acquisition spike.

Proactive onboarding recordings

We should have been watching session recordings *before* the crisis hit, rather than using them only as a post-mortem diagnostic tool.

Less binary elimination

Under extreme time pressure, I closed off some research threads too quickly when early data seemed clear. I needed to maintain a wider lens.

Making Sure It Never Happens Again

"The crisis was solved in 12 days. The systems I built after lasted the life of the company."



Automated Retention Monitoring

- Built automated Mixpanel dashboards tracking cohort retention curves in real-time.
- Configured threshold alerts: if D7 or D14 dropped below baseline, the team was notified immediately.
- No researcher needed to spot the next cliff.

"The first thing I did was make sure we'd never need a 12-day sprint again."



Standing Churn Survey

- Took the Phase 2 rapid churn survey and made it permanent with an automated trigger.
- Responses flow into a live dashboard for the team to check anytime.
- Quarterly review of questions to keep them relevant.

"The survey that diagnosed the crisis became a standing diagnostic tool."



Weekly Usability Test Battery

- Repeatable battery tied to the 8 key conversion points from the Mixpanel funnel.
- Ran weekly with rotating participants from the 2,000-member community.
- Results posted to a shared channel for engineering, marketing, and product.



Self-Serve Research Dashboard

- Aggregated retention metrics, churn survey, usability battery, and community feedback.
- Designed for non-researchers: plain language, visual summaries, trend indicators.
- Team could answer their own questions without filing a request.

Research as Infrastructure

| "The best research org is the one that doesn't bottleneck on the researcher."

BEFORE THE CRISIS	AFTER OPERATIONALIZATION
Research was project-based — someone had to ask for it	Research was always-on — data flowed continuously
Problems were discovered reactively — we saw the cliff after it happened	Problems were caught proactively — alerts fired before crisis
Only the researcher could interpret user health	Anyone on the team could check the dashboard
Usability was tested when scheduled	Usability was tested every week, automatically
Churn reasons required a new study	Churn reasons were continuously collected

 Time from signal to team awareness: **Weeks** → **Hours**  Automated systems were **still running** when I left Ensu

"I believe research is only as good as the decisions it changes. But the best research changes how decisions get made — permanently."

TWO STORIES. ONE BELIEF.

Great research doesn't just answer questions—it accelerates decisions.

READY FOR CAPITAL ONE'S NEXT CHAPTER



**THE DISCOVER
INTEGRATION**

Merging distinct user mental models and architectures at unprecedented scale.



AI & DYNAGUARD

Building robust, user-trusted guardrails for next-generation experiences.



**CONTINUOUS
SIGNALS**

Empowering cross-functional teams to act on democratized, rigorous insights.