

BOBBY KWAN

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DESIGN STRATEGIST

Seasoned mortgage finance professional, design leader, and user experience researcher passionate about customer experience. Successful at responding to shifting business needs. Well versed in the implementation of assessments and conducting requirement analysis of the business.

SKILLS

- Workshop Facilitation
- People Management
- Stakeholder Management
- Mortgage Industry Knowledge
- Design Thinking, Design Strategy
- Qualitative Research and Synthesis
- MS Excel, Quantitative Research
- UX Research

EXPERIENCE

Fannie Mae, Marketing – Customer Experience Design

11/2008 – 03/2021

UX Design Strategy Manager and Service Designer, 10/2016 – 03/2021

Member of a new team focused on bringing user-centered design practices to the enterprise.

Managed and mentored a full-stack design team including service designers, visual designers, user experience researchers, data scientists, service designers, and UI/UX designers.

- Designed and executed user experience research projects utilizing both qualitative UX research and quantitative UX research to explore and solution on the employee experience; Fannie Mae's affordable housing mission; customer behaviors on Fannie Mae systems, processes, and tools; and several internal processes.
- Planned and conducted collaborative user research workshops with internal and external stakeholders at a variety of levels ranging from interns to senior management including VPs and CEOs of major financial institutions.
- Synthesized and translated research into actionable insights and business requirements for stakeholders.
- Accelerated the maturity of the new digital products design team by bringing to it a combination of deep practical knowledge of the mortgage industry and history of superior customer service.
- Created UX project proposals, scoped work with clients, and oversaw project execution from inception to delivery; used influence to build and maintain relationships across the enterprise.
- Developed strategies to support the maturity of the department including survey design to understand partnership KPIs; improving UX communities of practice; and forming a baseline of HCI/UX industry design maturity metrics and KPIs.
- Created and delivered a half-day design thinking course to evangelize design thinking and user experience practices to the enterprise; conducted trainings for hundreds of colleagues across dozens of departments.

Fannie Mae, Business Architecture and Transformation

Senior Business Analyst, 04/2015 – 10/2016

Supported a greenfield project to determine major business digital transformation projects around the company.

- Co-facilitated a series of workshops with senior management to understand and prioritize future state customer technology and experience needs and expectations.
- Managed external vendor to develop and deploy customer surveys.
- Developed a foundational set of customer personas and journeys based on internal subject-matter interviews and data analysis from customer survey results.

Fannie Mae, Loan Servicing – Investor Reporting

Senior Business Analyst, 11/2008 – 04/2015

Front line customer-facing role - managed a portfolio of over 100,000 loans, a balance over \$10,000,000, supporting approximately 160 financial institutions. Managed a team of database developers, supported management as a team lead, and administered department-wide cost/capacity model tracking.

- Ensured timely and accurate payments, reporting, and reconciliation.
- Performed qualitative data mining and analysis to uncover systemic issues and reporting exceptions.
- Product manager for a series of internal- and external-facing metrics reports, KPI scorecards, and procedures; gathered and documented requirements, maintained and prioritized enhancement backlog, liaised with development teams, and conducted usability testing with stakeholders.

OTHER EXPERIENCE

Deloitte & Touche LLP, Structured Finance
MBS Collateral Analyst

09/2007 – 03/2008

Fannie Mae, Multifamily Mortgage Certification and Custody
Business Analyst

08/2006 – 06/2007

EDUCATION

Master of Science - Information Systems

University of Maryland, Baltimore County, Baltimore, MD

Bachelor of Science - Finance, Minor Economics

George Mason University, Fairfax, VA

TRAINING

- Advancing Innovation through Human-Centered Design – LUMA Institute (2019)
- Fundamentals of Innovation through Human-Centered Design – LUMA Institute (2018)

AWARDS AND PUBLICATIONS

- Silver Award. Written submission for Loyalty360 Experience & Design Innovation 2019. "Fannie Mae's Shift Toward Customer Centricity and the Development of the Customer Experience Design Team".
- CXD Partnership Survey. Cited by: Bhawalkar, G. (2020). The Business Impact of Design: Five Best Practices for Measuring It (May 14, 2020 edition). Forrester Research.