



# ThoughtExchange

## Templates

[Watch Full Demo Walkthrough](#)

# ThoughtExchange

ThoughtExchange is a community driven feedback and survey tool. It is a cloud-based, AI-powered engagement platform built to help leaders gather meaningful, open-ended feedback at scale — and actually do something with it. Unlike traditional one-way surveys, it enables dynamic participation — inviting participants to share ideas, rate each other's input, and surface what matters most through collective intelligence.



**The platform includes two core experiences:**

***Leader Experience*** (customer-facing)

***Participant Experience*** (public-facing)

I worked on bringing a guided templated experience to the Leader Experience/ Customer-facing side of creation, so leaders felt more in control of their creation experience, less lost and overwhelmed.

# Problem

One recurring challenge for leaders using ThoughtExchange was getting started. Creating an Exchange or survey required starting from scratch, which left many users feeling unsupported and overwhelmed.

Customers frequently referenced competitors like SurveyMonkey and Qualtrics, which offered template libraries and pre-built survey structures to help users begin quickly. Leaders were struggling at the most critical moment in the workflow: getting started.

Users reported feeling:

- Overwhelmed by building surveys from a blank state
- Unsure how to structure their Exchange
- Unsupported during the creation process
- Without guidance, the blank-slate experience created hesitation and slowed adoption. Leaders wanted inspiration, structure, and examples to help them move forward.



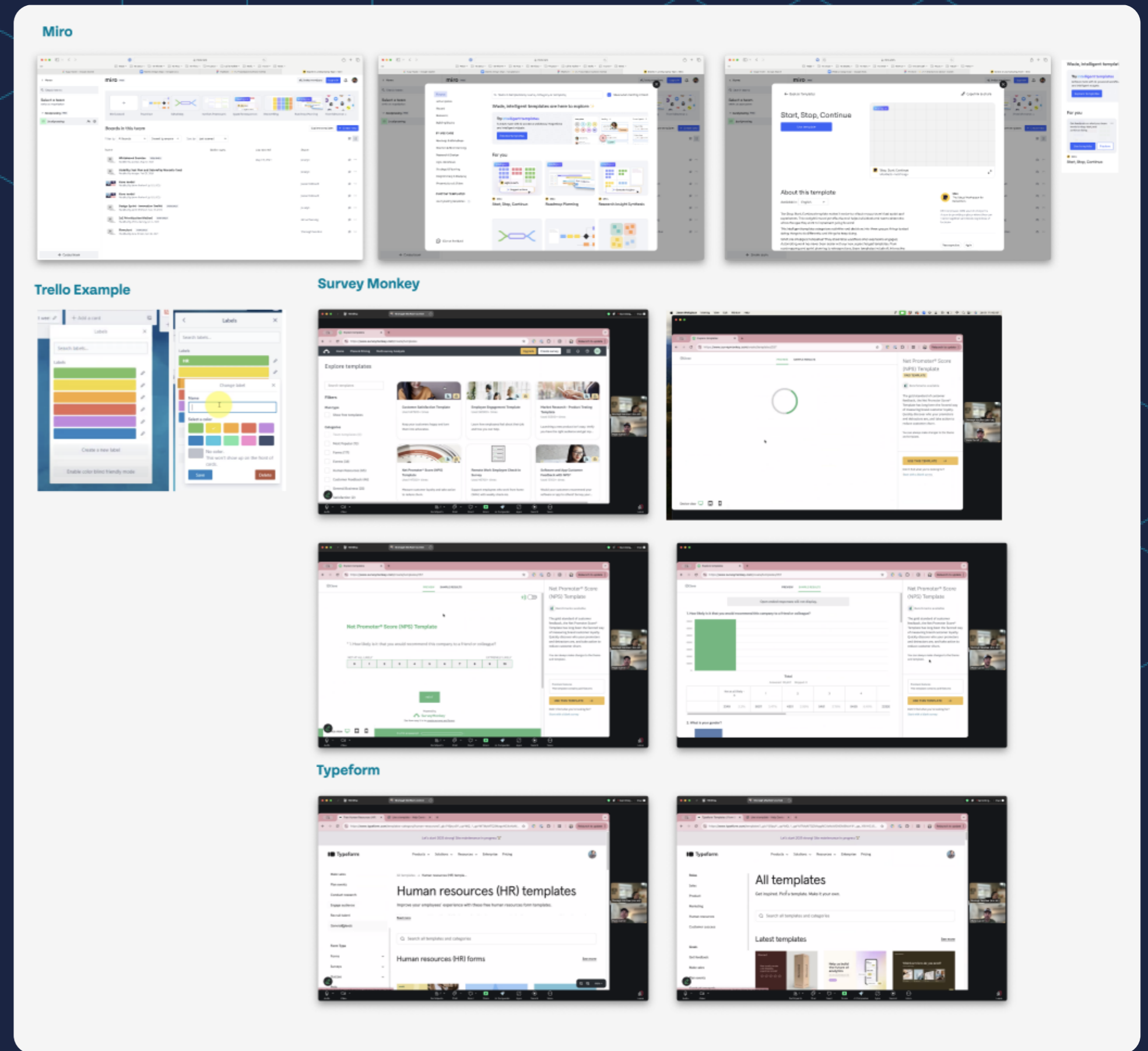
# What I Did

## 1. Discovery & Competitive Research

To understand how others solved this problem, I conducted competitive research across platforms including SurveyMonkey, Qualtrics, Maze, Monday, and Figma.

A clear pattern emerged: successful platforms provided template libraries that helped users quickly launch common workflows.

Templates weren't just shortcuts — they were onboarding tools.



## 2. Reframing the Creation Experience

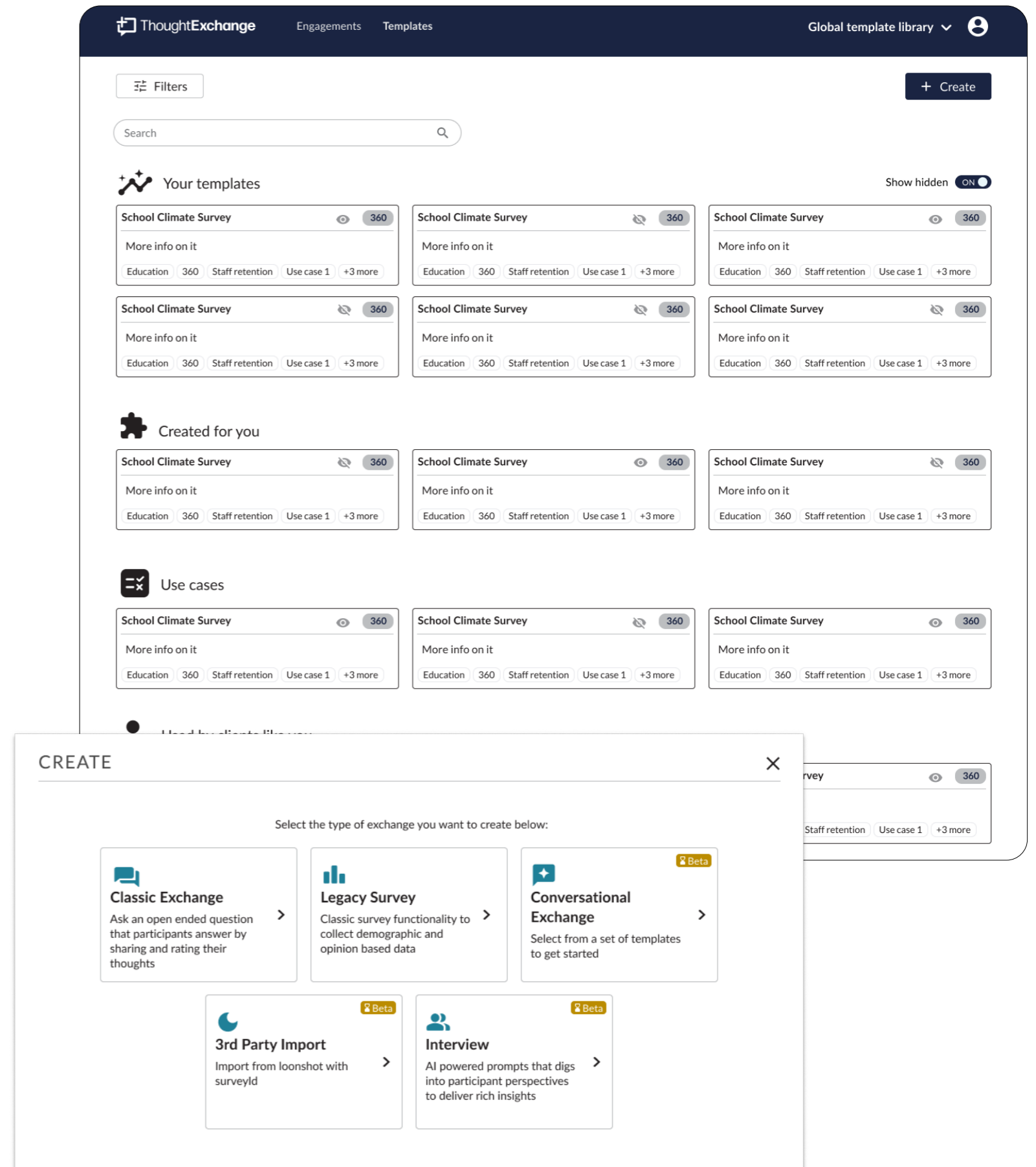
The next challenge was determining where templates should live within the product.

Competitive analysis revealed that many platforms surface templates in multiple places. To maximize discoverability,

I designed two entry points:

- A dedicated template library
- Direct access within the Exchange creation flow

This allowed leaders to either browse for inspiration or choose a structured starting point while creating.



### 3. Prototyping & Validation

I created interactive Figma prototypes and tested multiple iterations with customers and internal teams.

Testing focused on:

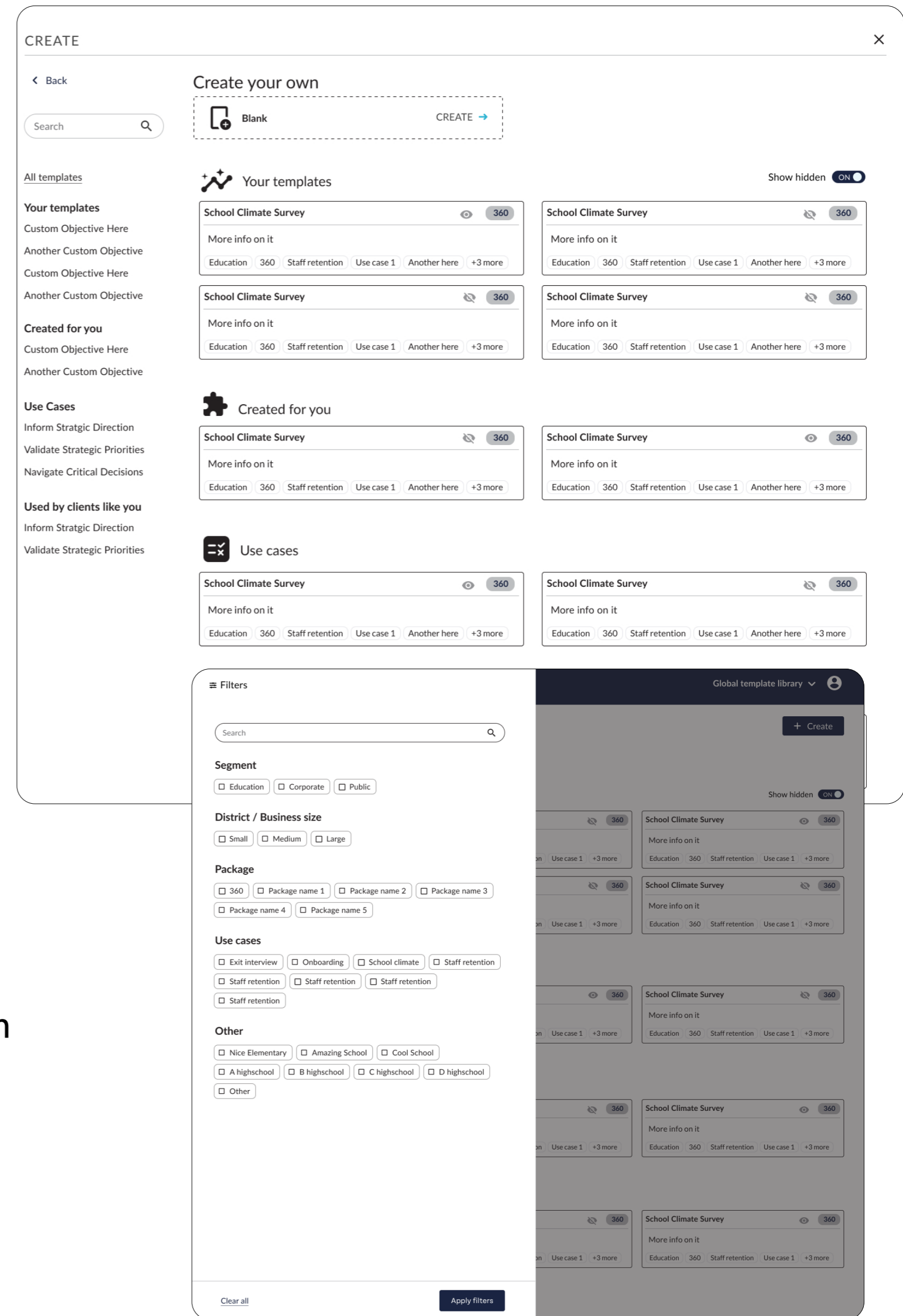
- Usability
- Decision clarity
- Perceived effort
- Leader confidence

Results showed an even split in behavior: about half of users discovered templates through the library, while the other half accessed them directly during creation.

Testing also surfaced additional needs:

- Clear template descriptions and objectives
- Visibility into question types and structure
- The ability to preview and share templates before using them

These insights shaped both the information architecture and visual presentation of the template system.



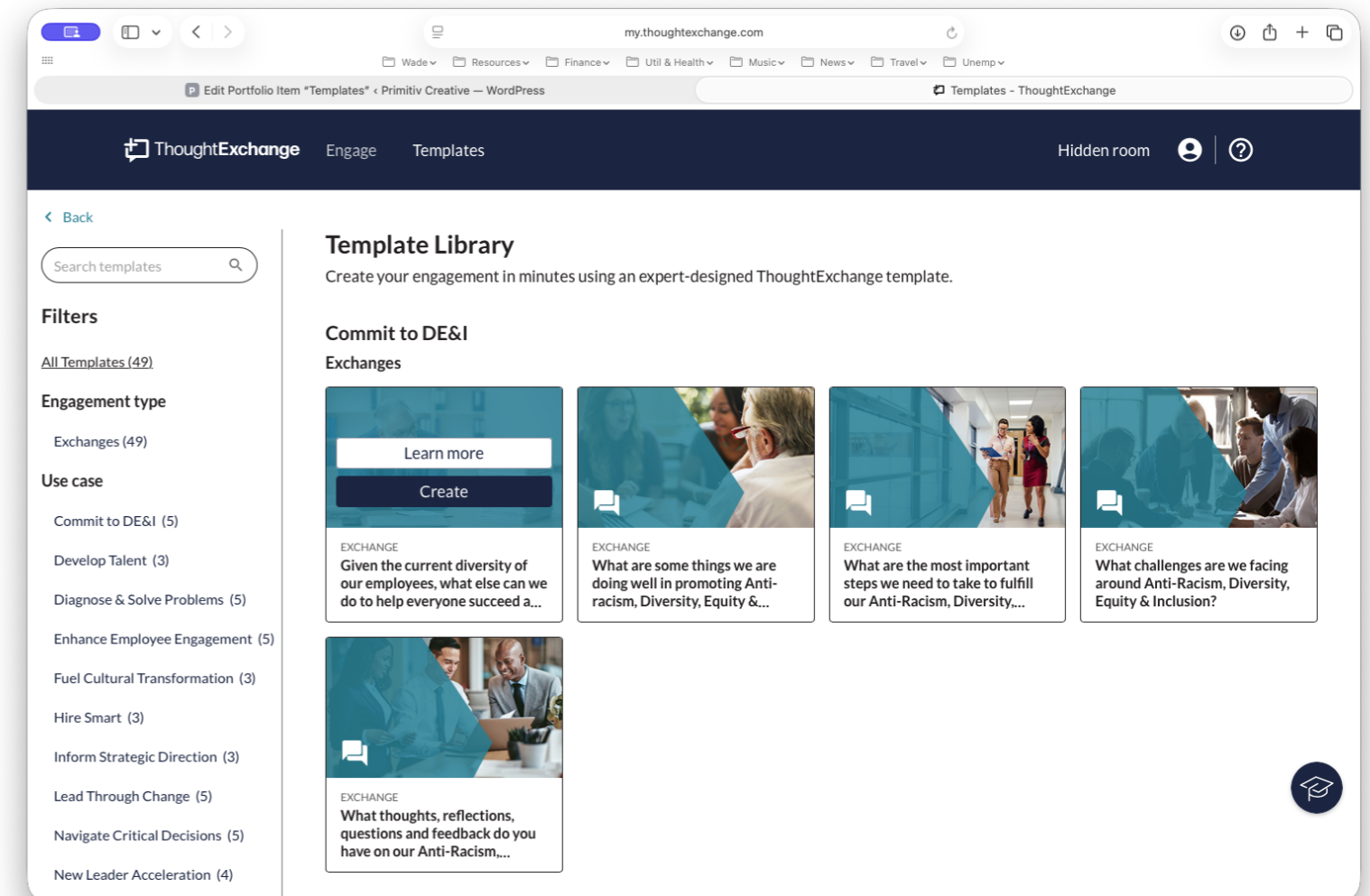
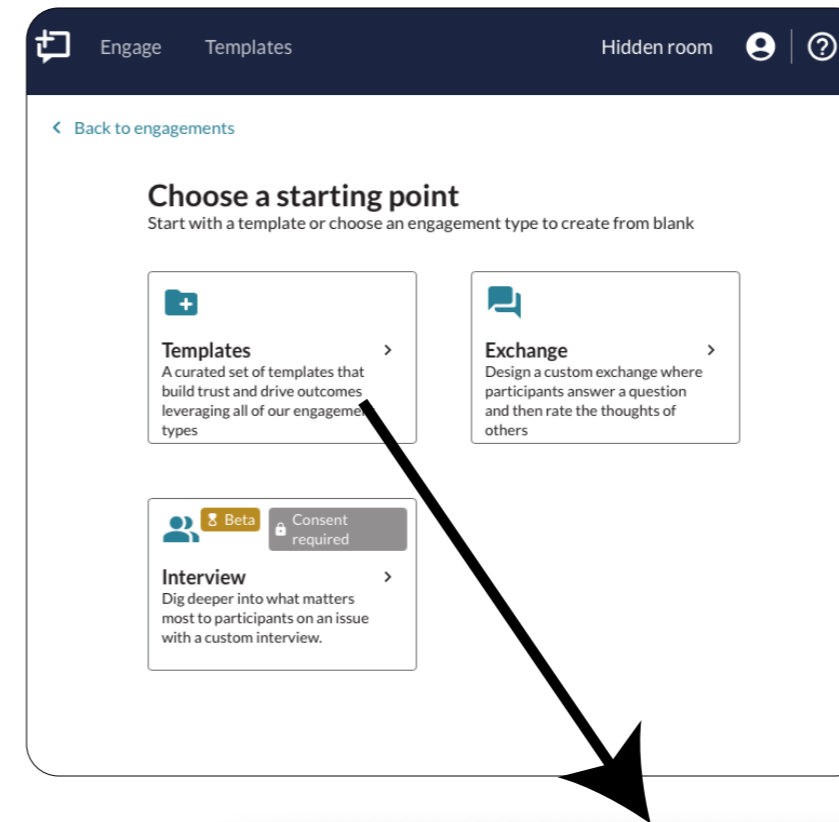
## 4. High-Fidelity Design & Implementation

With validated flows in place, I translated the experience into a scalable interface.

The solution included:

- A visual template gallery with color-coded categories and imagery
- Detailed “Learn More” overlays describing each template’s purpose and structure
- Reusable UI components to support future template expansion
- A scalable asset catalog to support engineering implementation

I worked closely with engineering through development to ensure UX consistency across states, edge cases, and filtering behavior.



# Impact

Introducing templates fundamentally improved the creation experience.

We:

- Reduced frustration and hesitation during survey creation
- Provided clear guidance and inspiration for new Exchanges
- Improved discoverability through multiple entry points
- Established a scalable framework for expanding the template library

Most importantly, leaders no longer faced a blank page. They started with direction — which made the process faster, easier, and far more approachable.

