



ThoughtExchange

Leader Experience Redesign

[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)

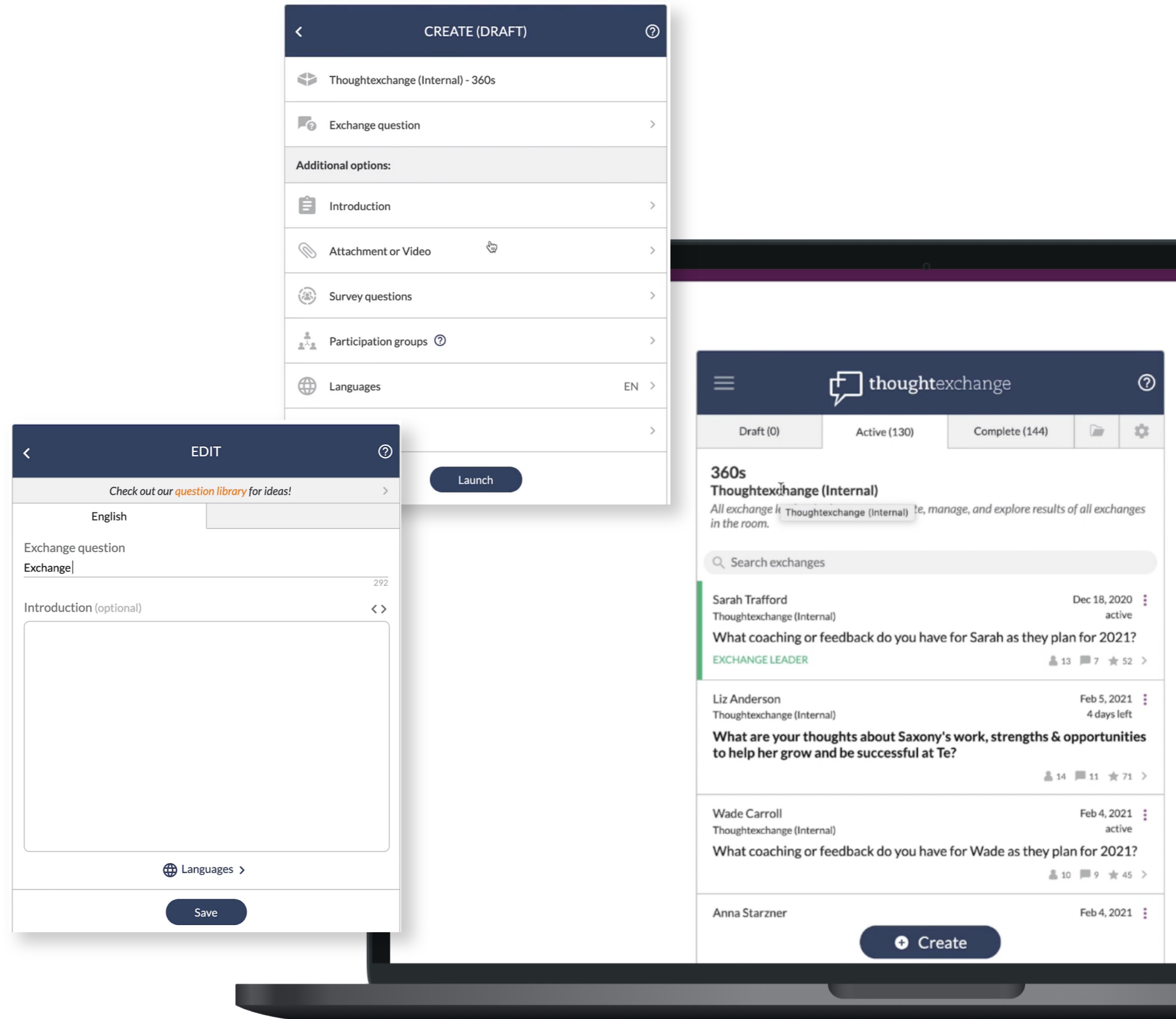
I worked on bringing both experiences from an embed style UI to a more modern user-friendly UI, while improving existing pain points and issues along the way.

Old Leader Experience

The core workflow of the *Leader Experience* — creating an Exchange — was unnecessarily complex; it was functional — but frustrating.

Leaders had to:

- Jump between multiple screens to set up an Exchange
- Navigate an embedded-style interface that felt clunky & outdated
- Click back and forth repeatedly to complete a single workflow
- Manage too many disconnected setup pages



LEADER USER JOURNEY

Leader Sam
Persona or Archetype

- 43
- Principal of High School in a district of 8 schools
- Missouri
- Not tech savvy

User Needs
Looking for employee feedback to get a new high school auditorium built for a 30 year old school.

User Mindsets
Sam is a little overwhelmed with the task of building and sending this survey to a staff of 125 teachers and substitute teachers.

Supporting research and documentation

- [GONG](#)
- [Aha!](#)
- [Slack CSM](#)

User steps <i>What is each step of the user journey?</i>	Awareness	Initiate creation	Creating steps	Finalize	Follow up Results
User actions <i>What action does the user take during each step?</i>	<p>Initial thinking around the questions and feedback thoughts they would like to gather.</p> <p>Begin to draft in their minds</p>	<p>Translate into the TE dashboard, but clicking create button.</p> <p>Choose which type of Exchange they would like to created.</p>	<p>Follow stepper to add into, sites, attachments, survey questions, deadline or scheduling date.</p>	<p>Review the summary step, the final step, and adjust any areas accordingly, with options to free flow back and forth between steps.</p> <p>Launch and invite</p> <p>Launching immediately opens the survey, if scheduled we show schedule.</p> <p>User will choose initial invitation options.</p>	<p>As the Exchange/ Survey is live, the Leader can check the results of the Exchange periodically until the Exchange/ survey closes.</p> <p>Generating reports and sharing confidential results to users is a valuable step for closing the loop.</p>
Goals & experiences <i>What is the user trying to accomplish?</i>	<ol style="list-style-type: none"> 1. establish a plan for their Exchange 2. make their lives easier when initiating an Exchange 3. organize thoughts and hierarchy of survey questions they would like to ask 	<ol style="list-style-type: none"> 1. Structure the Exchange appropriately based on awareness and planning 	<ol style="list-style-type: none"> 1. Create in a timely manner carefully, spell checking as they go along. 	<ol style="list-style-type: none"> 1. Make sure no errors anywhere, launch into the community by invitation (QR, email, or link). 	<ol style="list-style-type: none"> 1. Export reports 2. generate share options 3. Filter Exchanges by criteria 4. Invite new people needed.
Feelings and thoughts <i>Use the emojis below to help illustrate how the user might be feeling.</i>	<p>Overwhelmed, anxious and nervous, excited, frustrated.</p> <p>🙄 😞 😞 😞</p>	<p>Debilitated, overwhelmed, motivated, pensive, unsure.</p> <p>🙄 😞 😞 😞</p>	<p>More motivated, positive outlook, energized</p> <p>🙄 😊 😊 😊</p>	<p>Secure, confident, motivated.</p> <p>😊 😊</p>	<p>Depending on outcomes, could be a wide range.</p> <p>🙄 😞 😊 😊 😊</p>
Pain points <i>What's not working well? What causes friction?</i> <i>How many people does this affect? On a scale of 'nuisance to show-stopper', how bad is this pain?</i>	<ol style="list-style-type: none"> 1. May not have the information needed to begin on their end. 2. Unorganization. 	<ol style="list-style-type: none"> 1. Unsure where to start or go first 	<ol style="list-style-type: none"> 1. No real pain points of usability noticed here other than too much back and forth with old interface, no sense of guiding 	<ol style="list-style-type: none"> 1. Invitation options aren't super clear 2. little uncertainty of each invitation meaning - room for education here tool tips or explainer text here. 	<ol style="list-style-type: none"> 1. Lots of pain points with results 2. will address in future sprints - future improvements will be an ongoing situation 3. Exporting terrible, sharing not the easiest, visuals need cleaned up, possible NIVO
Opportunities <i>How might we address these pain points? How big is the opportunity if we correct this pain point?</i> <i>What are new ways to serve this person?</i>	<ol style="list-style-type: none"> 1. Provide help links/articles as guidance to help form their exchange ideas. 	<ol style="list-style-type: none"> 1. GainSight opportunities = 2/3 step call outs 	<ol style="list-style-type: none"> 1. Remove all the back and forth of pages, 2. Setup a guided stepper 	<ol style="list-style-type: none"> 1. Explainer text description for each invitation 2. Confirmation of invitations sent. 	<ol style="list-style-type: none"> 1. Improve most of the dashboard and new heat maps, charts and other featured results will be added in future. Will use that time to improve.

1. Discovery: Listening Before Designing

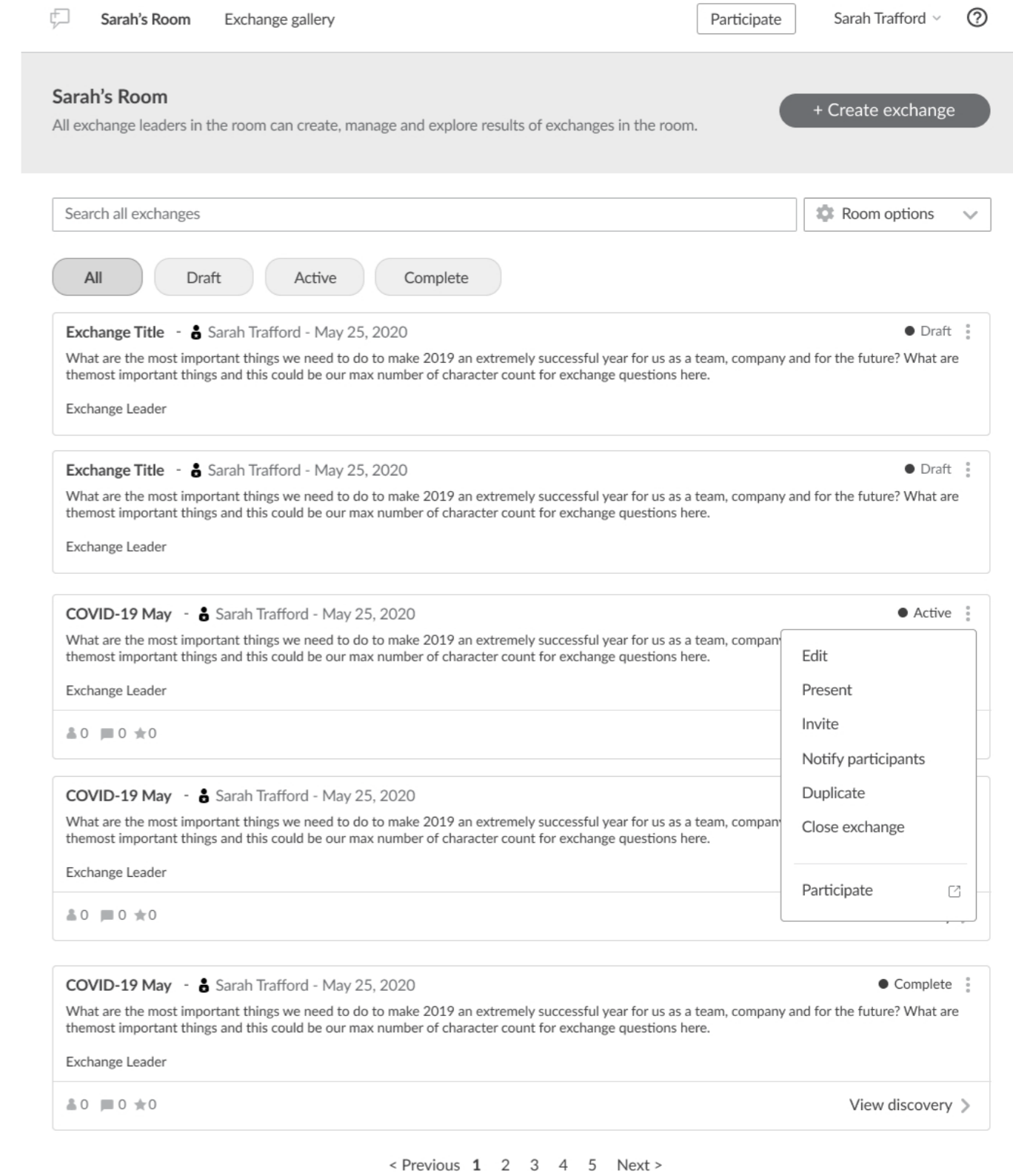
Before touching wireframes, I immersed myself in customer feedback. I combed through Slack threads from the CSM team, sales call recordings, support tickets, and product requests.

Patterns were clear.

The goal: move from fragmented setup to guided confidence. It was to redesign the experience of creating.

2. Re-Architecting the Creation Flow

I shifted the model and introduced a guided configuration flow — a step-by-step pathway that reduced cognitive load and increased clarity.



< Back to exchanges

Exchange settings

New exchange

All exchange leaders in the room can create, manage and explore results of exchanges in the room.

Exchange Details

Title

Question

Introduction (Optional)
Your reader will see this before they start their exchange

Survey (Optional)
Add a survey questionnaire to your exchange.

Q1 Questions allow a single answer selection.

Your question text goes here...

Answer(s)

Option 1

+ Add another question

Launch exchange

How would you like to invite participants?

Link

http://www.linklinlinklnsidfnlin.com

Copy text

Email

Exchange Number

SMS

OR

Participate

Cancel Primary

+ Add images

+ Create survey

Participation Grouping (Optional)
Group participants based on criteria

+ Create grouping

Cancel Save as draft Primary

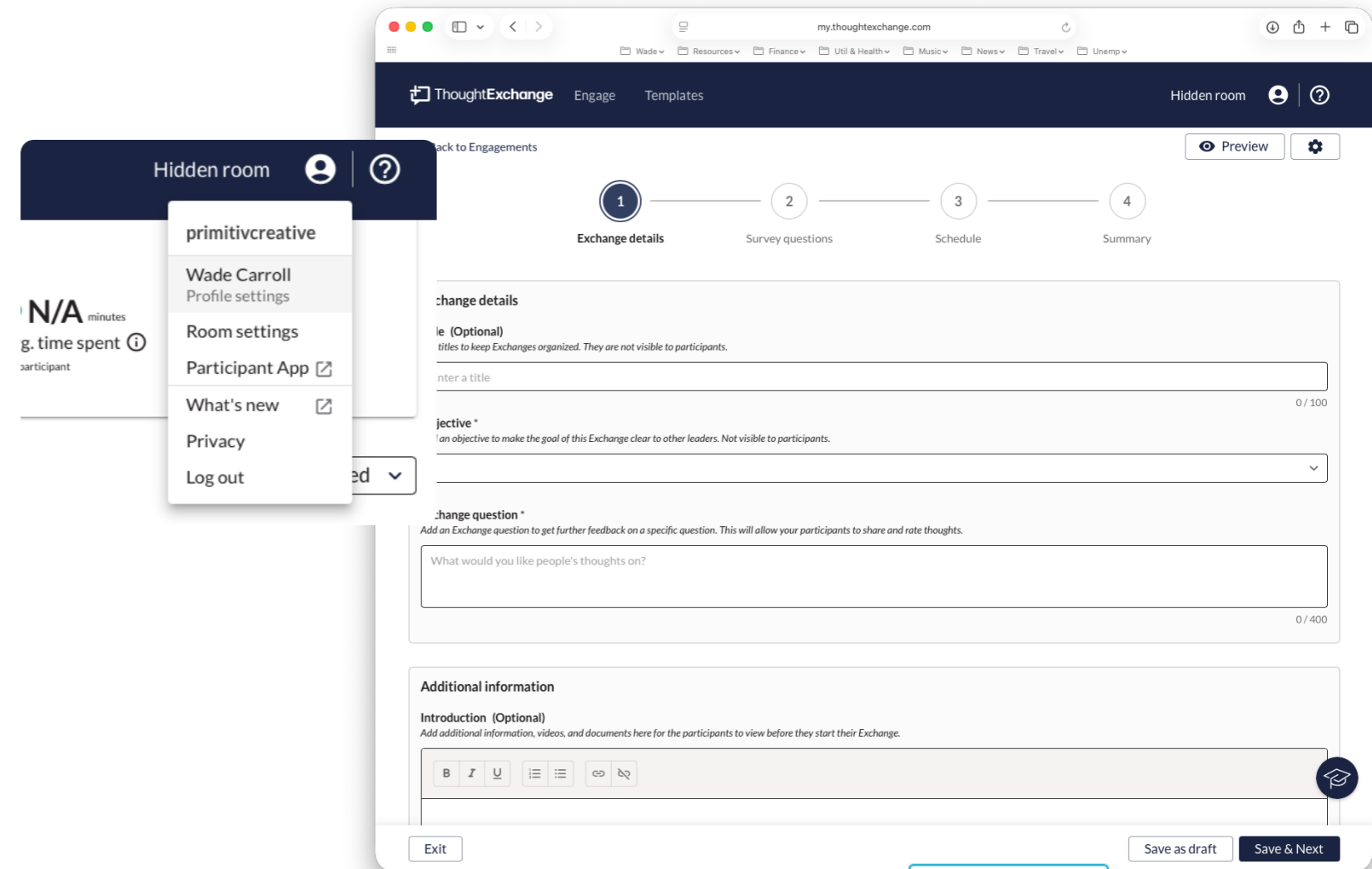
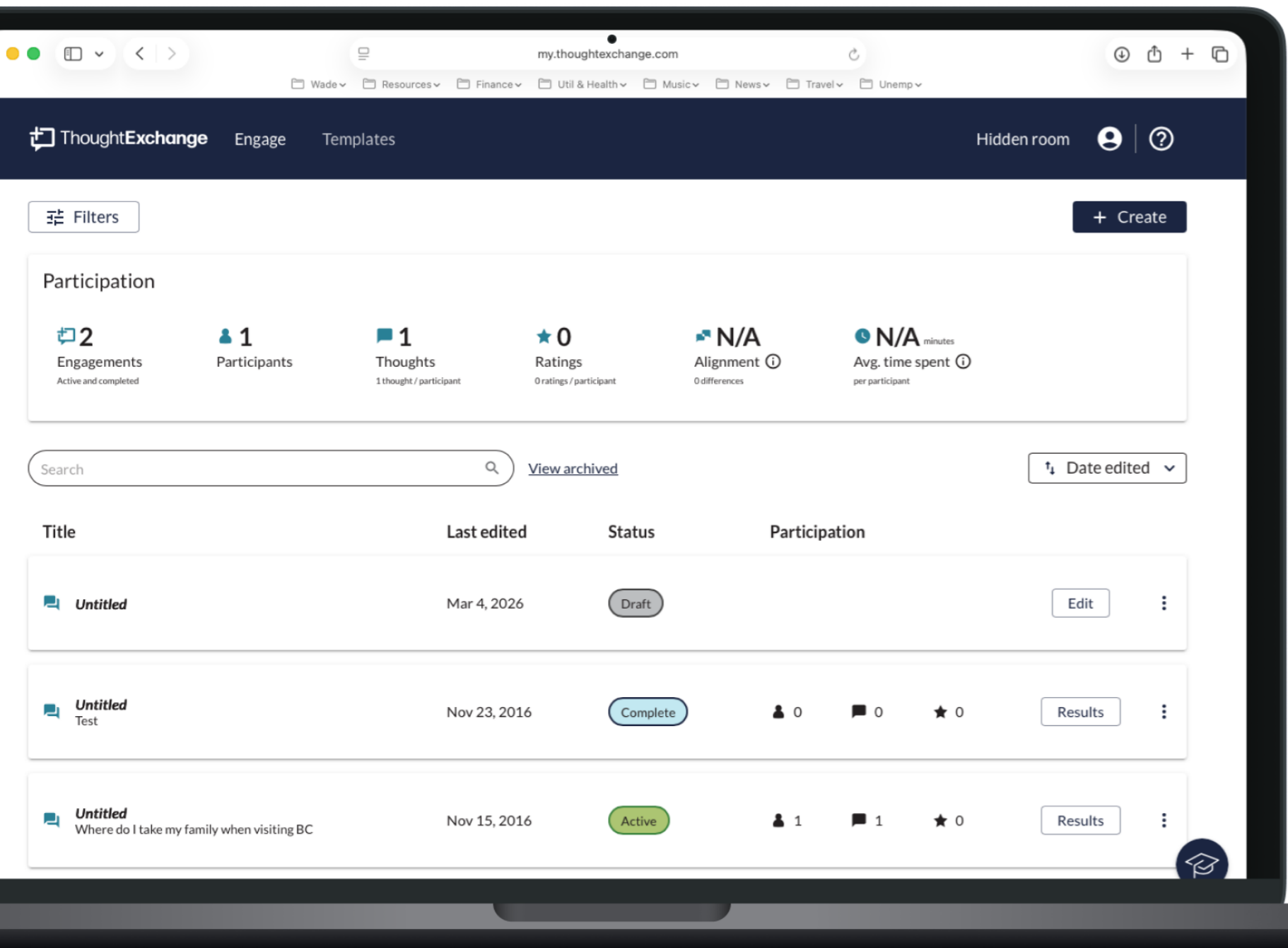
Cancel Preview Save as draft Primary

3. Prototyped & Validation

Built interactive Figma prototypes and tested them with customers and internal teams, for usability, decision clarity, perceived effort and Leader confidence. Insights drove refinements to hierarchy, micro-interactions, and system logic — ensuring the experience felt intentional and intuitive. This wasn't just a design exercise — it required alignment with engineering constraints and product strategy.

4. High-Fidelity System Design & Implementation

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



I designed:

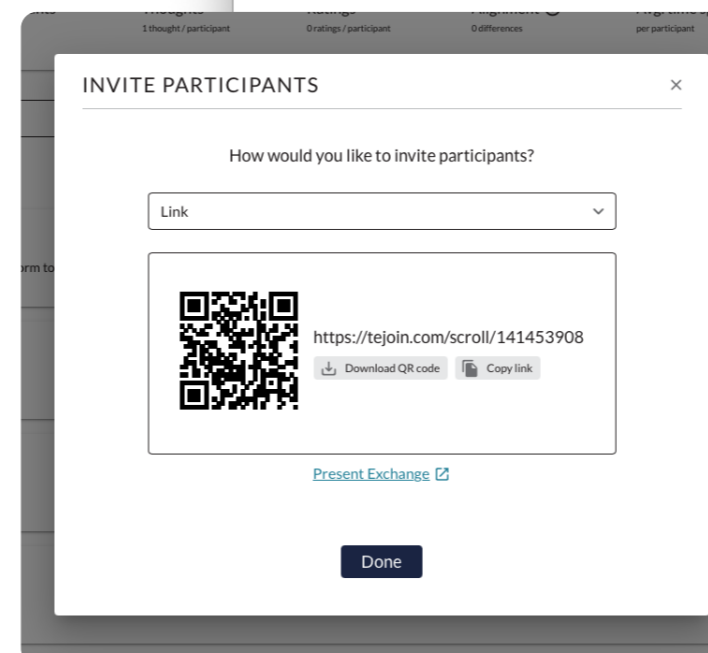
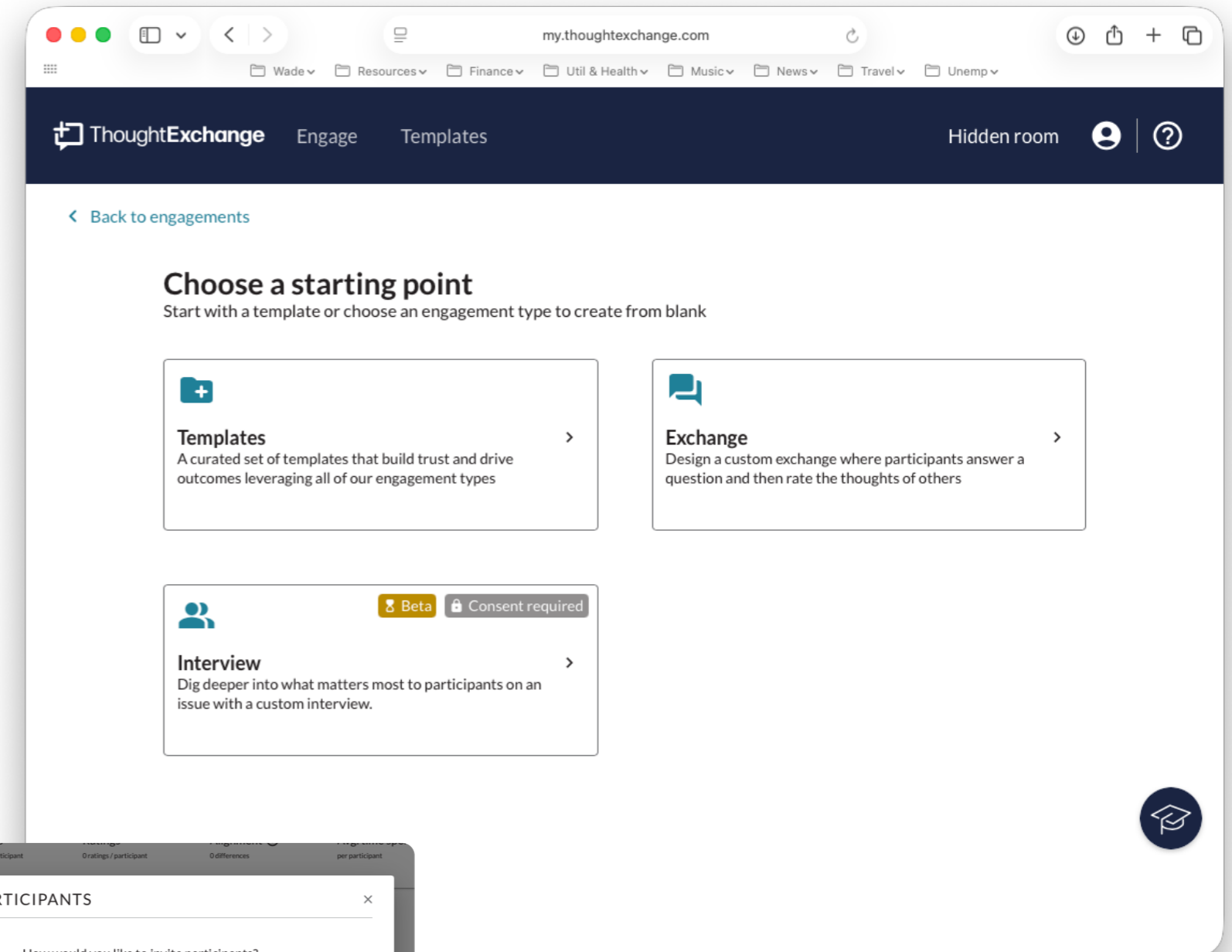
- A modernized, brand-aligned UI
- Reusable components
- Consistent interaction patterns
- Foundations for a scalable design system
- During implementation, I worked closely with Engineering to ensure the UX integrity survived handoff — collaborating through edge cases, states, and technical constraints.

Impact

We:

- *Reduced back-and-forth during Exchange creation*
- *Simplified a previously fragmented setup process*
- *Modernized the product's visual presence*
- *Built infrastructure that scaled with the company*

But more importantly — **Leaders felt guided.** Creating an Exchange went from a multi-screen chore to a clear, confident flow. And that shift reinforced the product's promise: helping leaders listen better and act smarter.



Responsive

This is a fully responsive experience that works on all screen sizes. These are the mobile designs for the Exchange List, New Exchange and the navigation menu.

