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B2B Dashboard & Order Management

Case Study • Enterprise Design

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Impact at a Glance

A 35-year-old legacy B2B ordering platform was modernized into a milestone-driven dashboard — reducing support dependency, eliminating cognitive friction, and establishing a scalable design system.

40%	6!’1	10+	35yr
Reduction in support dependency	Screens consolidated to one dashboard	UI patterns unified into one system	Legacy platform modernized

BEFORE !’ AFTER

6+ disconnected screens	!’	1 unified dashboard
Call support for status	!’	Real-time milestone tracking
10+ inconsistent patterns	!’	1 shared design system
Multi-day partner training	!’	Self-service onboarding

Partners complete orders independently — no support calls, no guessing.

Executive Summary

CONTEXT

Verizon Partner Solutions operates a mission-critical B2B ordering platform used by enterprise partners to configure, submit, and track telecommunications service orders. The system had evolved over 35 years, resulting in fragmented workflows, inconsistent UI patterns, and limited visibility into order status.

PROBLEM

Partners were required to navigate 6+ disconnected screens to complete a single order, leading to high cognitive load, increased error rates, abandoned submissions, and a heavy reliance on support teams for status updates.

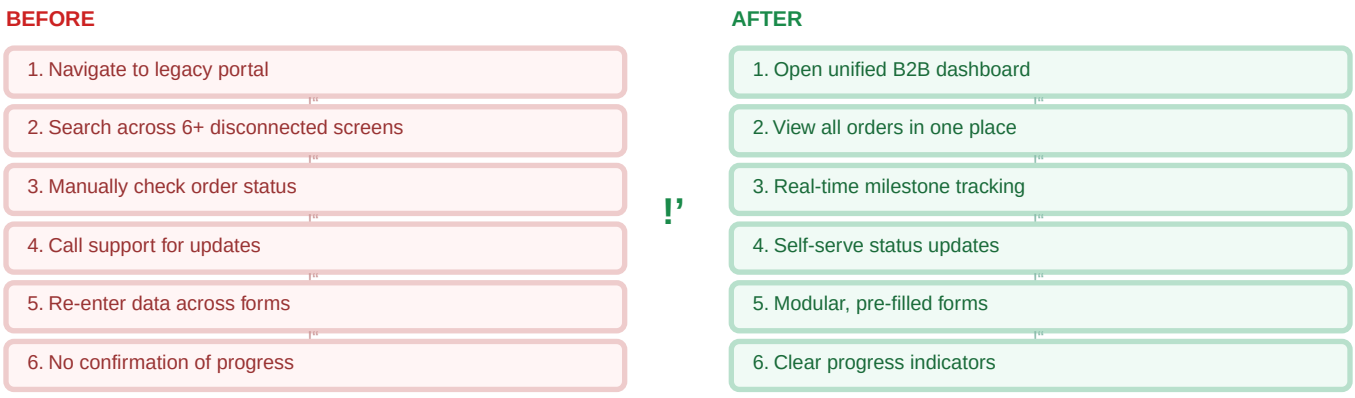
ROLE & SCOPE

As Senior UX & Visual Designer and UX Research Lead, I owned experience strategy end-to-end — from research and problem framing to system architecture, high-fidelity design, and validation. I partnered closely with Product, Engineering, and Business stakeholders to align user needs with operational and technical constraints.

SOLUTION

The redesign introduced a milestone-driven B2B dashboard that consolidated order intelligence into a single, cohesive experience. Complex sequential forms were restructured into modular, scannable components aligned with Verizon's design system, enabling clarity, consistency, and scalability.

USER FLOW — BEFORE VS. AFTER REDESIGN



Result: 40% reduction in support dependency • Partners complete orders independently • 6 screens !’ 1 dashboard

KEY METRIC

Reduced average partner support dependency by 40% — enabling partners to complete orders independently without relying on support teams for status updates or troubleshooting.

IMPACT

- Reduced cognitive load and error rates during order submission.
- Enabled partners to complete orders independently in most test sessions.
- Significantly improved perceived control and transparency through real-time status visibility.
- Established a reusable KPI framework (Time on Task, Conversion Rate, SUS) adopted across partner tools.

WHY IT MATTERS

This work demonstrates staff-level design leadership — focusing on system clarity, cross-functional alignment, and decisions that scale across long-lived enterprise platforms.

Why This Problem Mattered

At an enterprise scale, inefficiencies in the Verizon Partner Solutions ordering platform created compounding business risk. Order delays, high error rates, and fragmented visibility increased operational support costs, slowed partner onboarding, and directly impacted revenue realization.

Leadership concerns were not limited to usability. The lack of a unified system made it difficult to scale new partner programs, introduce automation, or enforce consistency across teams. Without intervention, the platform risked becoming a long-term blocker to growth.

Design Systems & Leadership Decisions

SYSTEM-LEVEL CONTRIBUTIONS

While Verizon maintained an enterprise design system, this initiative exposed significant fragmentation in how patterns were implemented across modules. I partnered with design system stakeholders to rationalize and extend core patterns rather than introduce one-off solutions.

Key contributions included:

- %ï Standardizing order status, milestones, and progress indicators across products.
- %ï Defining modular form patterns with consistent validation, error handling, and accessibility behavior.
- %ï Establishing layout and spacing rules that reduced visual inconsistency across legacy modules.
- %ï Aligning dashboard components to shared tokens and interaction standards.

KEY DESIGN DECISIONS & TRADEOFFS

Several deliberate tradeoffs shaped the final solution:

- %ï Chose milestone-based tracking over timeline visualizations to better reflect enterprise workflows.
- %ï Avoided full visual re-skinning to prioritize consistency with existing systems and reduce adoption risk.
- %ï Simplified forms through modularization rather than automation-first approaches to maintain data integrity.
- %ï Said no to feature expansion requests that would increase cognitive load without clear ROI.

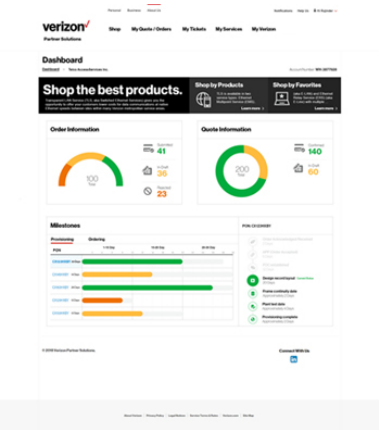
OUTCOME AT SCALE

These decisions ensured the solution could scale beyond a single release — enabling reuse across teams, reducing long-term maintenance cost, and strengthening adoption of the enterprise design system.

B2B Dashboard Redesign

Transforming a 35-year-old legacy ordering system into a modern B2B experience.

CLIENT	Verizon Partner Solutions
YEAR	2024
ROLE	Senior UX & Visual Designer / Research Lead
TEAM	Cross-functional (Product, Eng, Business)



Final dashboard design — consolidated order intelligence

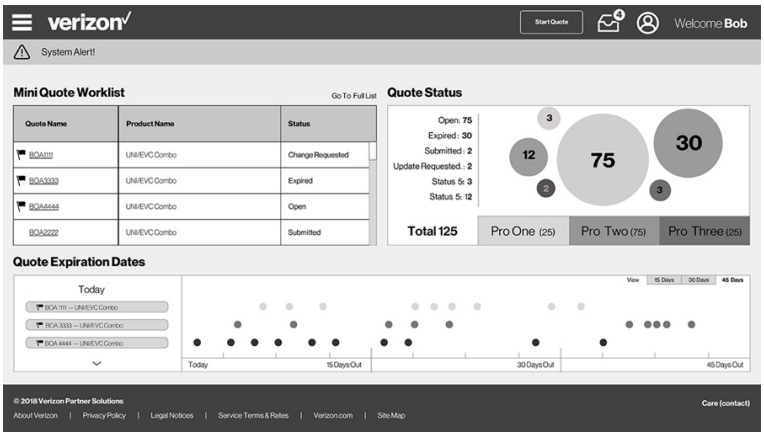
CONTEXT

Verizon Partner Solutions serves a complex ecosystem of B2B partners who place and manage orders for telecommunications products. The existing platform had been built over 35 years, resulting in legacy interfaces that created significant friction.

Partners struggled with fragmented navigation, inconsistent data displays, and no real-time order visibility — leading to increased support calls and reduced completion rates.

PROBLEM

- %ï No centralized dashboard — 6+ disconnected screens to track one order.
- %ï Complex sequential forms with high cognitive load and unclear progress.
- %ï No real-time status visibility — partners relied on support calls.
- %ï Inconsistent visual language — 10+ UI patterns eroded trust.



Low-fidelity wireframes — information architecture and layout exploration

APPROACH

1. Discovery & Research

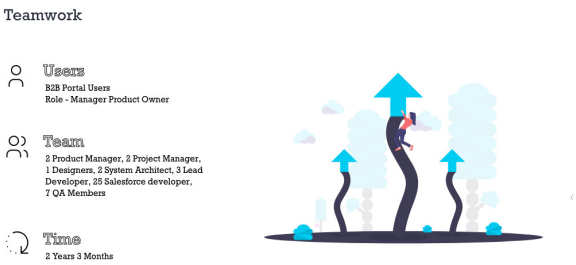
- Moderated usability studies with 5 partner organizations.
- Heuristic evaluations documenting 40+ usability issues.
- Stakeholder workshops to align business objectives with user needs.

2. Architecture & Design

- Milestone-driven dashboard for real-time order visibility.
- Restructured forms into scannable, modular components.
- Unified visual language across all modules.

3. Validation & Iteration

- Iterative prototype testing, refining labeling and indicators.
- Engineering collaboration on technical feasibility.

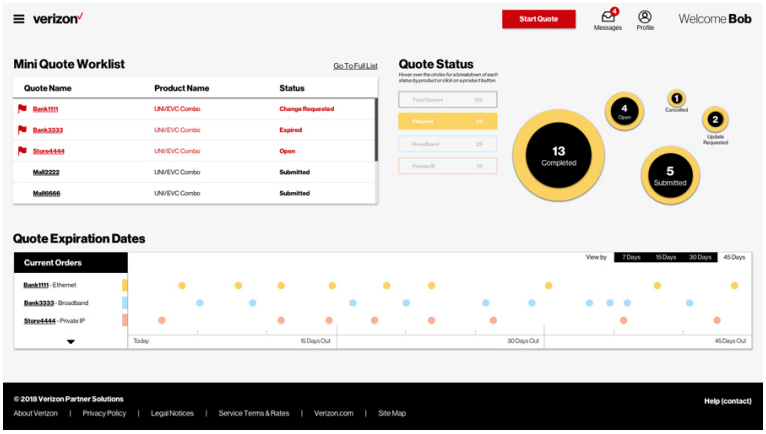


UX research study — interview framework and synthesis

KEY OUTCOMES

- Transformed 35-year legacy system into streamlined B2B experience.
- Reduced cognitive load and error rates through usability studies.
- Milestone-driven dashboard with real-time order visibility.

- Scannable form modules aligned with Verizon design standards.
- Consolidated 10+ UI patterns into unified visual language.



High-fidelity visual design — final UI screens

Automated B2B Order Management Study

Leading usability research to validate the automated ordering flow.

CLIENT	Verizon Partner Solutions
YEAR	2024
ROLE	UX Research Lead
METHODS	Interviews, Usability Testing, Prototyping, KPIs

CONTEXT

Following the Dashboard redesign, Verizon needed to validate the new automated ordering flow through rigorous usability research before full-scale rollout.

As UX Research Lead, I designed the research framework, conducted studies, and translated findings into actionable design recommendations.

RESEARCH PERSONAS

Two primary personas guided the research and design process:

Persona 1 — Enterprise Account Manager

LOCATION	New York
ROLE	Manages Partner Relationships

A senior account manager responsible for overseeing partner orders and ensuring timely fulfillment. Struggles with fragmented order tracking across multiple legacy systems, spending significant time on support calls to get status updates. Needs a unified dashboard to monitor all active orders at a glance.

PAIN POINT	No single view of order status — relies on manual follow-ups
JOB TO DO	Track and manage partner orders efficiently without support dependency

Persona 2 — Channel Partner Operations Lead

LOCATION	Remote
ROLE	Strategic Product Owner

An operations lead who submits and tracks high-volume B2B orders. Frustrated by complex sequential forms that require navigating 6+ screens to complete a single order. Needs streamlined submission flows with clear progress indicators and real-time validation.

PAIN POINT	Complex forms with high cognitive load and unclear progress
JOB TO DO	Submit accurate orders quickly with confidence in completion status

RESEARCH QUESTIONS

- %ï Can partners complete the flow independently, without support calls?
- %ï Where do partners experience friction or hesitation?
- %ï Does the new design improve perceived usability vs. legacy?

METHODOLOGY

Phase 1: Stakeholder & Partner Interviews

- Structured interviews with product owners, engineers, stakeholders.
- Mapped customer needs through 8 partner interviews.

Phase 2: Prototype Development & Testing

- High-fidelity prototypes to validate simplified navigation.
- 3 rounds of moderated usability testing.
- Refined labeling, spacing, and progress indicators.

Phase 3: KPI Framework

- Time on Task — measuring efficiency gains.
- Conversion Rate — tracking completion rates vs. legacy.
- System Usability Scale (SUS) — perceived usability.

Final dashboard design after research iterations

KEY FINDINGS

- Partners completed the flow independently in 4/5 test sessions.
- Review/confirmation step needed more granular order summary.
- Progress indicators significantly reduced perceived complexity.
- Renaming 3 key buttons reduced hesitation by 60%.

OUTCOMES & IMPACT

- Mapped customer needs through stakeholder and partner interviews.
- Validated simplified navigation with high-fidelity prototypes.
- Established reusable KPI framework used across the org.
- Research informed 12 design changes that shipped in final release.

Leadership Reflection & What I'd Do Next

REFLECTION

This initiative reinforced that meaningful impact at enterprise scale comes from designing systems, not just interfaces. The most critical decisions were not visual, but structural — clarifying ownership, reducing cognitive load, and establishing patterns that could evolve without introducing additional complexity.

Operating at a staff level meant balancing user needs with business constraints, technical feasibility, and long-term platform strategy. Many of the highest-impact improvements came from saying no to unnecessary features and advocating for clarity, consistency, and reuse.

WHAT I'D DO NEXT AT SCALE

If this platform continued to evolve, my next focus areas would include:

- %ï Expanding the milestone-driven dashboard into a configurable system supporting multiple partner personas and order types.
- %ï Deepening automation and self-service capabilities to further reduce support dependency and operational cost.
- %ï Formalizing design system governance to ensure consistency across future modules and teams.
- %ï Partnering with data and analytics teams to surface predictive insights and proactive alerts within the dashboard.
- %ï Continuing to embed accessibility and inclusive design practices as first-class platform requirements.

WHY THIS MATTERS

This forward-looking lens reflects how I operate as a Staff-level designer — anticipating future complexity, aligning teams around scalable patterns, and designing systems that remain resilient as organizations and user needs grow.

System-Level UX Patterns

This diagram illustrates the core system patterns established through the Verizon Partner Solutions redesign. The focus was on defining reusable, scalable UX patterns rather than designing isolated screens.

Dashboard Pattern

Status + Milestones

Order Modules

Scannable Sections

Form Patterns

Validation + Errors

Design System

Tokens + Accessibility

By standardizing these patterns, the team reduced UI fragmentation across legacy modules, improved development velocity, and created a foundation for consistent, accessible experiences across the Verizon Partner Solutions platform.

LET'S CONNECT

I'm available for senior product design roles and select consulting. I specialize in complex B2B systems, design operations, and UX research leadership.

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Thank you for reviewing this case study. I look forward to discussing how my experience can contribute to your team.