



# Hi, I'm Marjorie.

**UX Researcher**  
**hello@marjoriecastro.ca**

## Case studies

- **CareGuide - Caregiver Profiles**  
Helping increase trust and confidence in caregiver profiles while encouraging connections
- **BCM - Order Activity**  
Enabling professional traders to make informed decisions about their trades.

## Wrap up

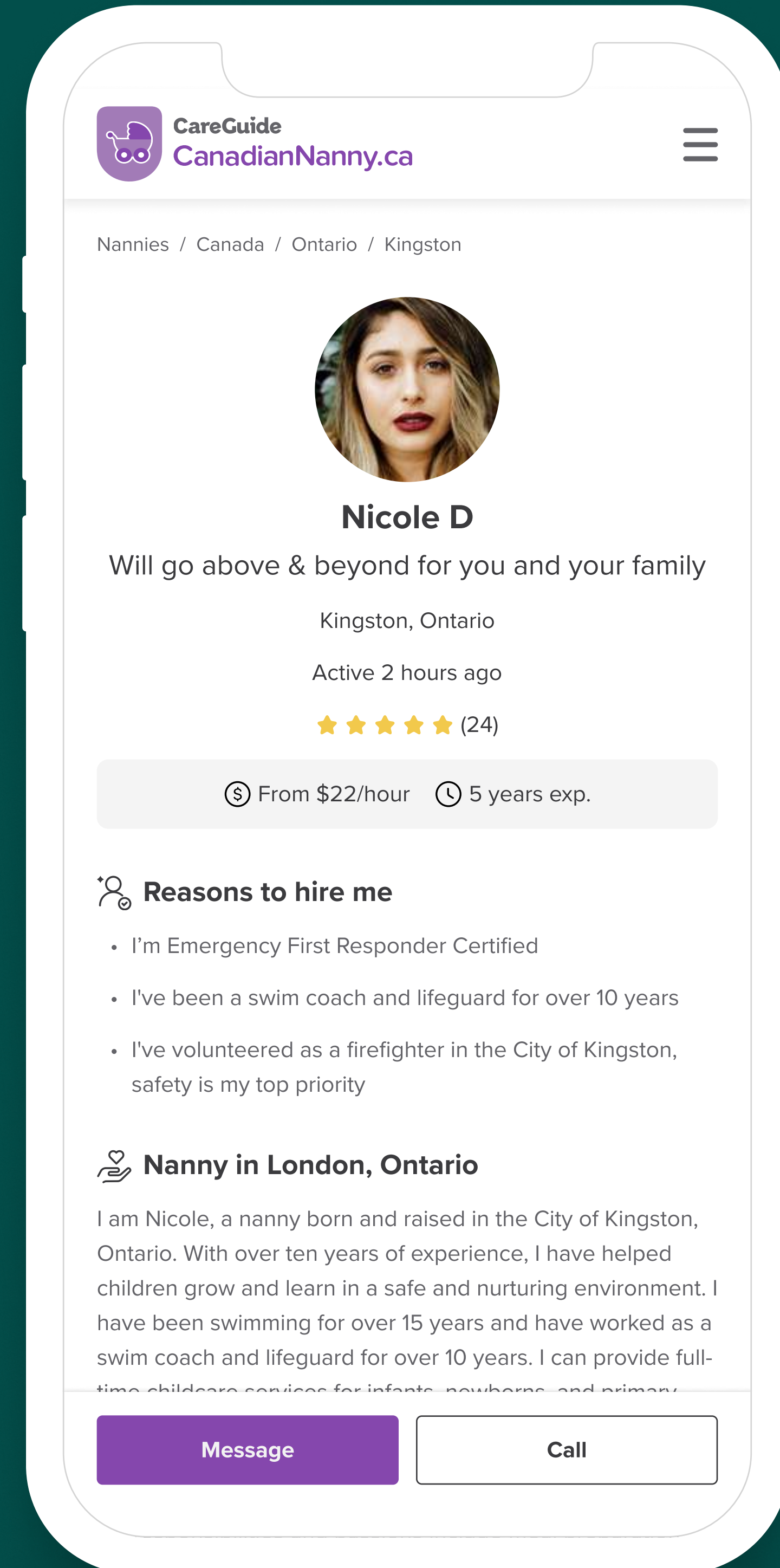
- What sets me apart?
- Shoutouts

# CareGuide

MARKETPLACE • B2C • WEB APP

## Caregiver Profiles

Helping increase trust and confidence in caregiver profiles while encouraging connections.





# ABOUT CAREGUIDE

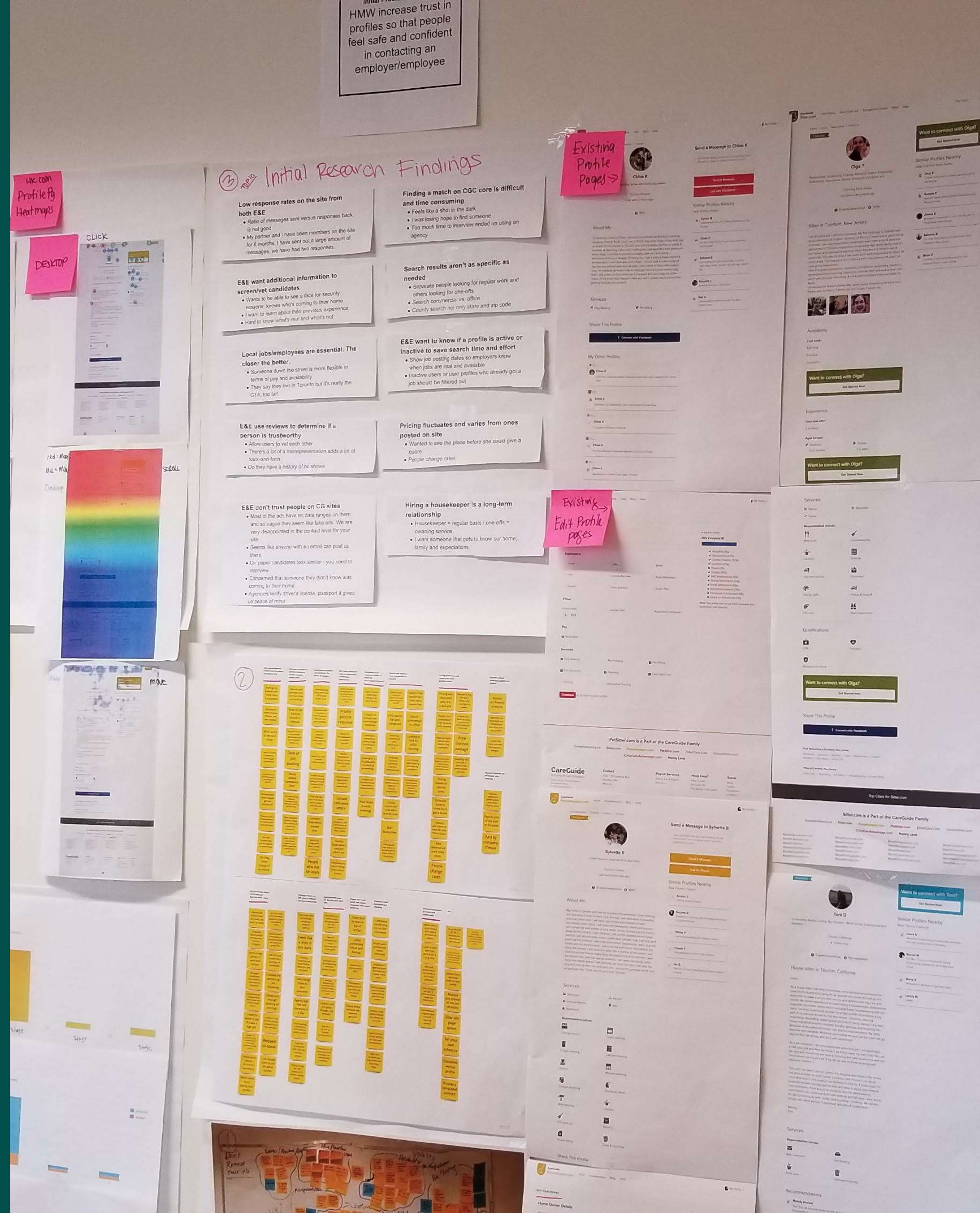
It's a Series A Care Services Marketplace with seven distinct offerings within four verticals: child care, pet care, elder care, and home care.

## ROLE:

- User Research
- Facilitator

## KEY ACTIVITIES

- Research plan
- Co-working sessions
- Moderated usability tests
- Remote customer interviews
- Heat mapping
- Synthesis
- Report





CHALLENGE

# Care seekers thought profiles looked similar

People searching for caregivers were getting frustrated because the caregiver profiles were falling short. They found the information in the profiles was often incorrect or not very useful. They felt all the profiles were too similar, missing important details needed to choose a caregiver. Unfortunately, the profiles weren't hitting the mark.

This had a significant impact. Fewer people started conversations with caregivers, and not many upgraded to Premium. It made finding a suitable caregiver a bit tricky.



Q1 2021 - Profile page - Core - User interviews

**CN - Employer**

I find the profiles are very vague and don't lend well to vetting a candidate.

Profile 62



13 Feb 2021



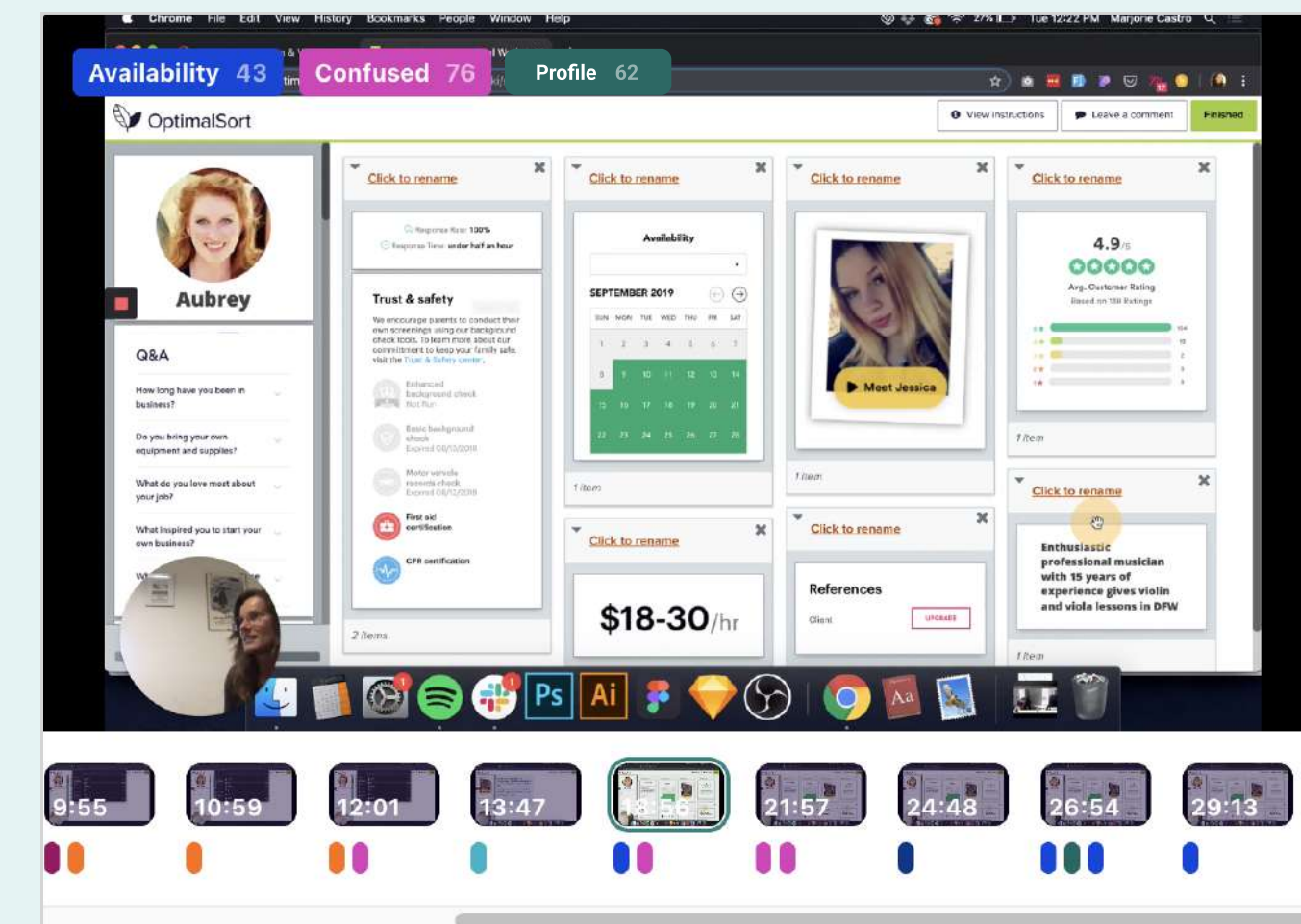
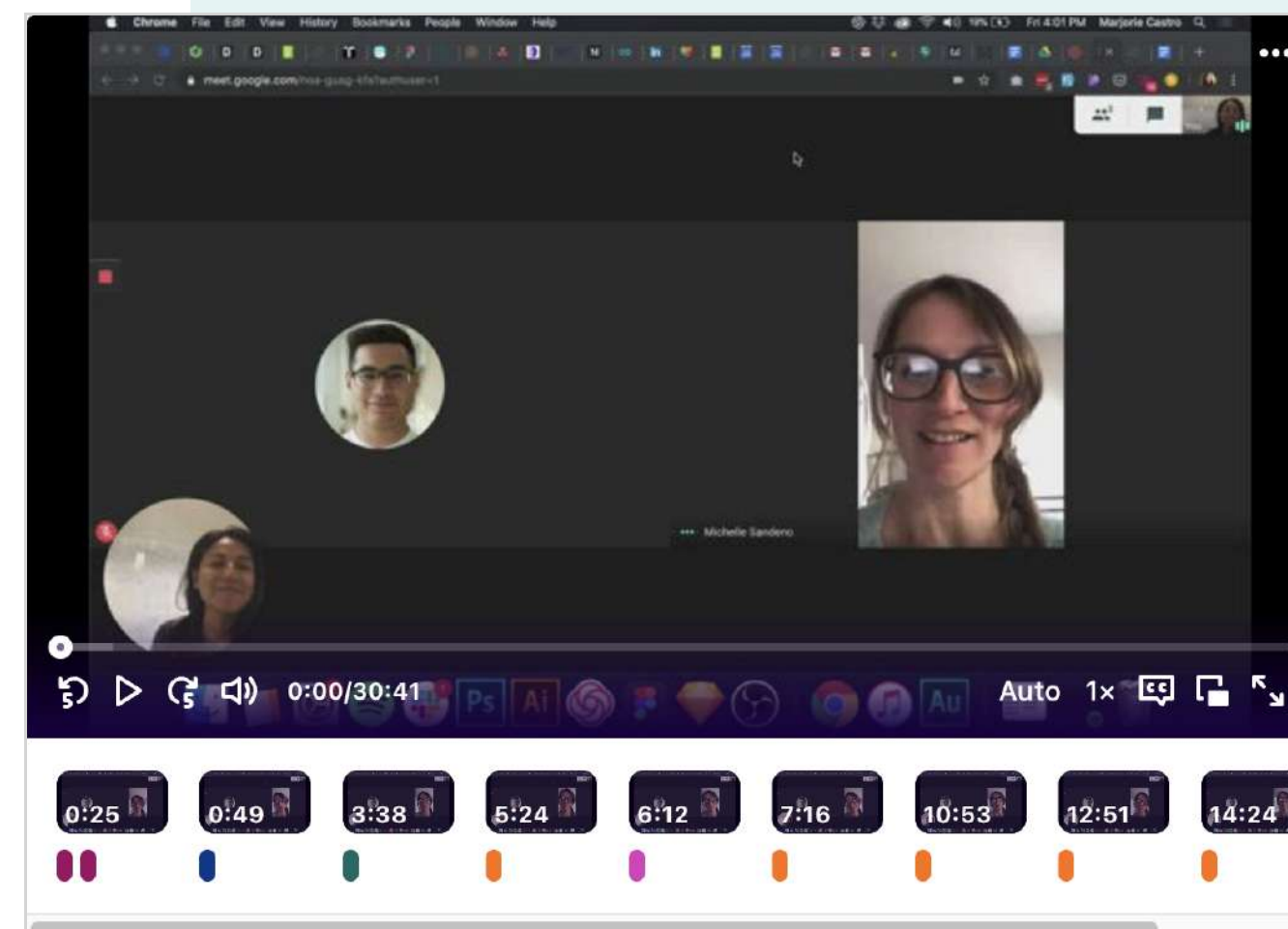
## APPROACH

# Unraveling caregiver selection challenges

To gain a better understanding of caregiver selection, we talked to both sides of the market across all four verticals: home care, childcare, pet care, and eldercare. We wanted to find out what care seekers considered important before getting in touch and what details caregivers were ready to provide to make their profiles appealing.

We began with usability testing on our current profiles to pinpoint sources of confusion and areas that were working well. After that, we organized a co-creation session with care seekers, inviting them to create an ideal caregiver profile using features from similar marketplaces. This process revealed new profile information we hadn't previously thought about and shed light on customer priorities.

Lastly, we conducted remote interviews with care seekers. This deep dive allowed us to explore their vetting and hiring processes and identify factors that built trust within the marketplace and among its members. Once we'd narrowed down the list of essential profile elements, we tested profile prototypes to see if people now had the information needed to start conversations or shortlist a candidate.



## RESULTS

# Quality profiles increase trust and conversations

The research highlighted the challenges care seekers face when trying to find dependable caregivers for their loved ones. Moving from initially connecting with a stranger to establishing trust was a significant hurdle.

We learned that by providing accurate, reliable, and timely information, we could improve the way we match caregivers with those seeking their services, ultimately increasing trust in the marketplace and its members while boosting subscriptions from Basic to Premium.



"I like the section where caregivers highlights things about themselves. It gives me a better sense of who that person is before I message them."

—

**Danielle G, Pet sitter**  
Houston, Texas



RESULTS

# Shaping the product roadmap

These findings shaped the product plan for the year. Our focus was on enhancing the quality of profiles by gradually introducing new elements to caregiver profiles.

These additions included displaying availability, sharing reviews, indicating the caregiver's last activity, giving reasons to hire them, and enhancing existing features such as location, wages, descriptions, and services.

Edit availability

### What's your availability?

Let clients know what your weekly schedule typically looks like.

☐ Full-time

☐ Part-time

☐ Occasional

#### Start Date

2023-01-24

#### Day of week

Select all that applies

S

M

T

W

TH

F

S

Update my availability

CareGuide  
CanadianNanny.ca

Nannies / Canada / Ontario / Kingston

**Nanny in London, Ontario**

I am Nicole, a nanny born and raised in the City of Kingston, Ontario. With over ten years of experience, I have helped children grow and learn in a safe and nurturing environment. I have been swimming for over 15 years and have worked as a swim coach and lifeguard for over 10 years. I can provide full-time childcare services for infants, newborns, and preschool children, whether live-in or live-out.

#### Availability

Job type: Part-time

Start date: Thursday, Oct 05 2022

Day of the week: Monday - Saturday

#### Services

Bathroom

Kitchen

General room

#### Responsibilities include:

Has own vehicle

Has supplies

Change linens

#### Qualifications

Background check

#### Recommendations

Message

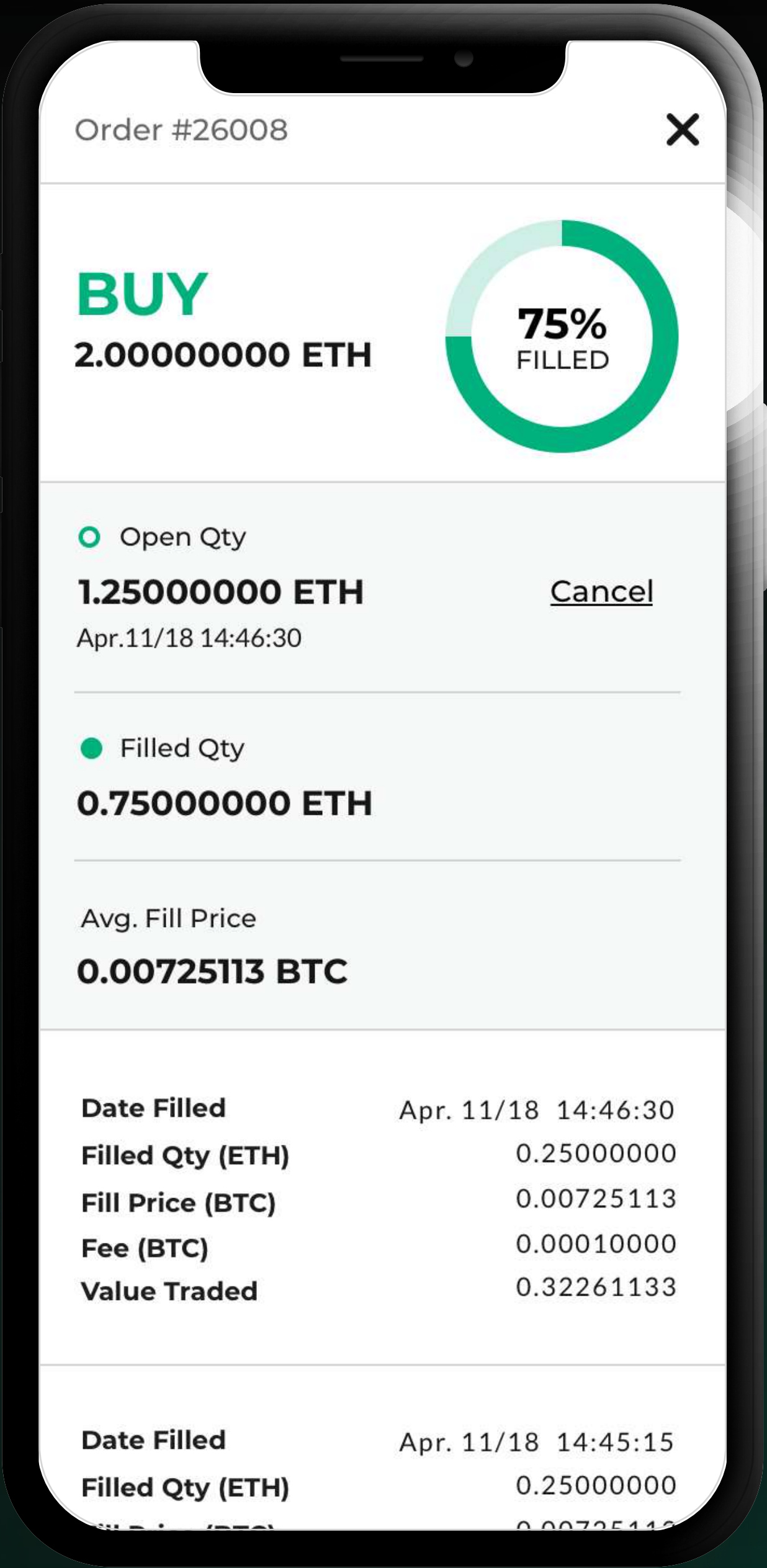
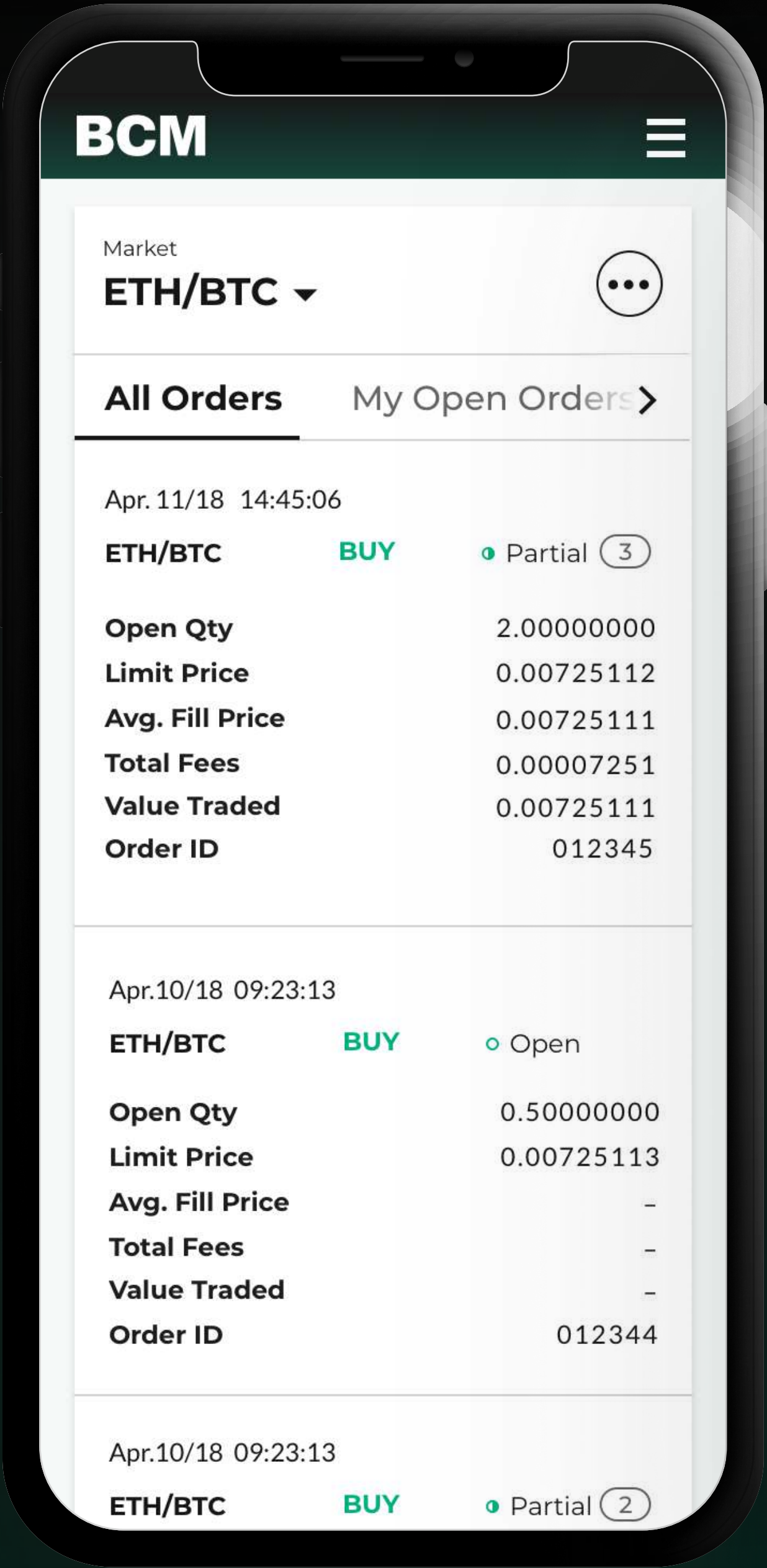
Call



FINANCIAL EXCHANGE • B2C • WEB APP

# Order Activity

Enabling professional traders to make informed decisions about their trades.





## ABOUT BCM

A financial exchange for professional traders.  
Acquired by Bitbuy in 2018, integrated into platform and launched as Bitbuy Pro in 2019.

## ROLE:

- User Research
- Facilitator

## KEY ACTIVITIES

- Desk research
- Research plan
- Design facilitation
- Moderated usability testing
- Subject matter experts interviews
- Synthesis
- Report





CHALLENGE

# Traders lack vital trade details

The BCM exchange allows pro traders to trade crypto securely. When trades are made, the platform records them in the Order Activity section, which allows them to check if trades have been completed or remain open.

During our initial research on the alpha product, we learned traders had trouble managing their open orders. They had to do manual work to identify order breakdowns and calculate associated fees. This process made it difficult for them to make quick decisions and, as a result, slowed down their ability to trade at better rates.

This problem not only affects traders but also has wider effects on liquidity and revenue due to the loss of fees. Having enough liquidity is important to make sure there are enough buyers and sellers available for trades to occur quickly and at fair prices.

BCM

ExchangeDeposits & WithdrawalsOrder Activity

Order Activity

Select a market

ETH/BTC

My Open Orders

My Fills

My Cancelled Orders

Market	Type	Open Quantity (ETH)	Price	Total	Open Date
ETH/BTC	SELL	0.10000000	0.00010000	0.00010000	Apr.11/18 14:45:06
ETH/BTC	BUY	0.10000000	0.00010000	0.00010000	Apr.10/18 14:45:06
ETH/BTC	BUY	0.10000000	0.00020000	0.00020000	Apr.08/18 13:45:01
ETH/BTC	SELL	0.10000000	0.00020000	0.00020000	Apr.06/18 10:45:10
ETH/BTC	SELL	0.10000000	0.00010000	0.00010000	Apr.06/18 10:28:06
ETH/BTC	BUY	0.10000000	0.00010000	0.00021000	Apr.05/18 12:45:06
ETH/BTC	BUY	0.20000000	0.00010000	0.00020000	Apr.05/18 13:45:01
ETH/BTC	SELL	0.20000000	0.00010000	0.00020000	Apr.05/18 10:28:10
ETH/BTC	BUY	0.00010000	0.00010000	0.00020000	Apr.05/18 12:45:06
ETH/BTC	BUY	0.01000000	0.00010000	0.00010000	Apr.05/18 13:45:01
ETH/BTC	SELL	0.01000000	0.00010000	0.00010000	Apr.05/18 10:28:10

Legal & Privacy

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*“I don’t know which ones are part of the same order and what the fee for each is.”*



## APPROACH

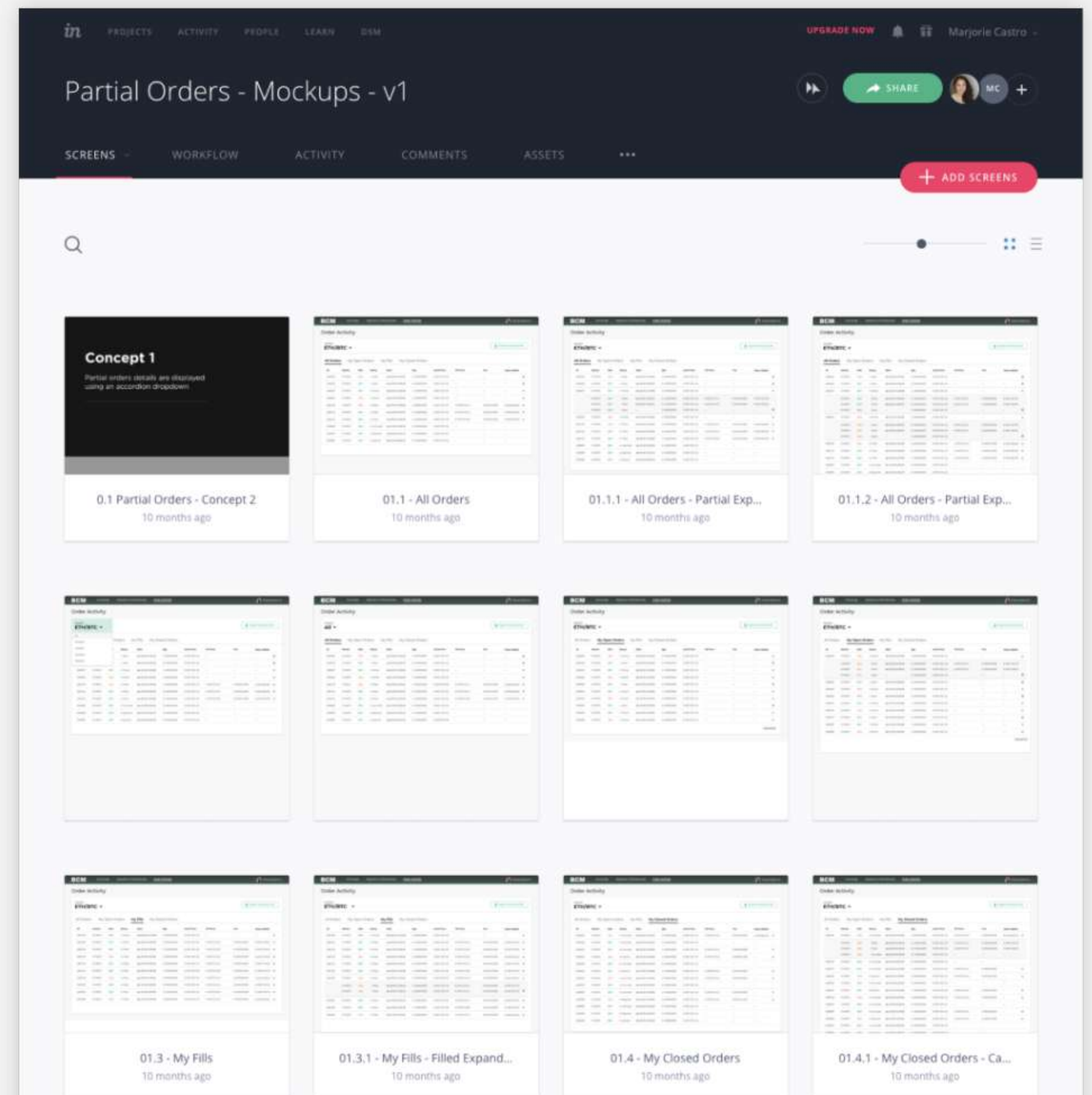
# Delivering order status clarity

To tackle this challenge, I needed to understand the complex details of order fulfillment and the transaction information available to us. I achieved this by talking with experts within our company, including traders, lawyers, and developers. I then reviewed how other exchanges handled similar challenges. Since there were few professional crypto exchanges at that time, I focused on studying stock exchanges instead.

The team then developed three ideas for testing. Our goal was to help traders quickly understand the status of their orders and make well-informed decisions. We conducted an in-person, moderated test with participants from two groups: Pro Traders, who possess substantial trading expertise, and Prosumers, who may not be expert traders but are comfortable with advanced trading platforms.

Our goal was for participants to achieve the following:

- Identify open, filled, partial, and canceled orders
- Understand the status, performance and fees of orders
- Make a decision regarding their open trades





RESULTS

Traders can trade with confidence and ease

Our research had two main benefits: it helped traders make better decisions and allowed the product team to design a solution that aligns with their audience's workflow. Now, traders can do more. They can check if orders are complete, cancel inactive ones, and adjust prices and quantities before trading again, which helps them manage risk more effectively.

In terms of design, our research made it easier to explore order details, reduced mental effort with calculations and made it quick to check order status and see all trade fees, building trust.

Instead of conducting experiments, we applied these improvements. We monitored metrics like the average duration of partially filled orders, the number of partially filled orders canceled, the frequency of new orders placed immediately after a cancellation, and any potential increases in trading fees.

BCMExchangeDeposits & WithdrawalsOrder Activity

Market  
ETH/BTC

Export Activity (CSV)

All OrdersMy Open OrdersMy FillsMy Cancelled Orders

Date Placed	Market	Side	Status	Total Qty	Limit Price	Avg. Fill Price	Total Fees	Value Traded	Order ID
Apr.11/18 14:45:06	ETH/BTC	BUY	Partial	2.00000000	0.00725112	0.00725111	0.00007251	0.00725111	012345
Apr.10/18 09:23:13	ETH/BTC	BUY	Open	0.50000000	0.00725113	—	—	—	012344
Apr.10/18 06:14:30	ETH/BTC	BUY	Partial	2.00000000	0.00725111	0.00725110	0.00000362	0.00725111	012343
Apr.10/18 06:01:12	ETH/BTC	SELL	Filled	0.50000000	0.00725110	0.00725109	0.00000906	0.00361649	012342
Apr.09/18 01:20:40	ETH/BTC	BUY	Open	0.50000000	0.00725109	—	—	—	012341
Apr.08/18 19:22:30	ETH/BTC	BUY	Cancelled	1.24000000	0.00725109	0.00725108	0.00181277	0.00543831	012340
Apr.08/18 17:19:03	ETH/BTC	SELL	Rejected	0.75000000	0.00725112	—	—	—	012339
Apr.08/18 16:12:47	ETH/BTC	SELL	Open	2.15000000	0.00725111	—	—	—	012338

Order #26008

BUY 2.00000000 ETH

Open Qty  
1.25000000 ETH  
Apr.11/18 14:46:30

Filled Qty  
0.75000000 ETH

Avg. Fill Price  
0.00725113 BTC

Cancel

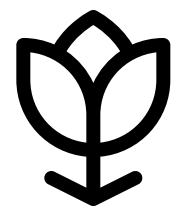
75% FILLED

Date Filled	Filled Qty (ETH)	Fill Price (BTC)	Fee (BTC)	Value Traded
Apr.11/18 14:46:30	0.25000000	0.00725113	0.00010000	0.32261133
Apr.11/18 14:45:15	0.25000000	0.00725113	0.00010000	0.32261143
Apr.11/18 14:45:09	0.25000000	0.00725112	0.00010000	0.25735112
			0.00030000	0.90257378



WRAP UP

# What sets me apart?



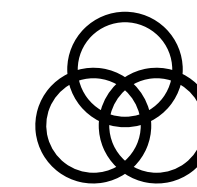
## Experience in startups

I've had the opportunity to work on net new products and expand on existing ones. I'm comfortable navigating uncharted environments.



## I practice evidence-based design

I encourage teams to use research, data, and experiments to create products that impact customers and businesses.



## I've scaled design teams and functions

From agency to start up teams I have helped set up operations, improve existing processes and shape overall product strategy.

# A few things team members have said...

Hey! I just wanted to send you a message before I left Slack. I've been impressed by you and how you've-grown our products and the design function on Core. You've really turned it into a product that's driven by user insights and design thinking. And that's such a hard thing to accomplish at this current scale. I can't wait to see how you, the team and the products grow in the future.

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**Shannon**  
**General Manager @ NannyLane**

Shoutout to Marjorie! Besides being a talented designer, a wonderful human, and a great friend, her willingness to help does not go unnoticed. Some folks know I'm working on revamping our employee onboarding process, and Marj sent over some helpful information about a great onboarding experience can look like. Thank you!

**Jessie**  
**Manager, People, Culture & Belonging @ CareGuide Core**

2 years feels like forever yet no time at all. You've literally re-invented everything about Core since you joined. The way we do research, the way we solve problems, our design language, how we work with engineering and and endless list of other things Really proud of what we are building here - and can't wait to see what we accomplish next.

-

**Ali**  
**COO @ CareGuide Core**

Huge shoutout to Marjorie for setting up a state-of-the-art ongoing research process for us. She thought about all steps, documented guidelines with different media and made them super clear and easy to follow, which empowers the team to conduct user interviews. I also appreciate the tips and words of encouragement. You have set us up for success.

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**Qinglan**  
**Product Designer @ CareGuide Core**



# Let's collaborate!

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