

Samantha Finkelstein PhD

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SNAPSHOT

I'm a research scientist with 10+ years experience applying mixed-method approaches towards the design of user-centered technical solutions. I apply an empathy-forward lens to understand complex journeys, with a focus on identifying the real drivers and blockers of people's current behaviors. My specialty is in the identification and measurement of the social and emotional factors driving target behaviors, which are typically not only "illogical" but difficult to quantify, and thus often over-looked.

WHAT I BRING

QUALITATIVE METHODS

1-1 Interview, contextual inquiry, journey mapping, story-boarding, card sorting, longitudinal diary study, RITE, heuristic eval

QUANTITATIVE METHODS

Experimental design, analysis of variance, survey, linguistic & non-verbal annotation, thin-slice analysis

ADDITIONAL SKILLS

Mixed-methods approaches typical within behavioral science, pedagogical science, and sociolinguistics; identifying mental models and Jobs To Be Done; instructional design; archetype and persona development

TOOLS

InVision, balsamiq, userzoom, reframer, xtensio, qualtrics, SPSS

INTERVENTION ENVIRONMENTS

Mobile apps, web tools, conversational virtual agents, online forums, online courses, immersive virtual & augmented reality

DOMAIN EXPERTISE

Financial health, socially responsive design, persuasive design & behavior change, k-12 education, relationship science, sociolinguistics, socio-emotional skill development

SELECTED EXPERIENCE

JP MORGAN CHASE | VICE PRESIDENT | UX RESEARCH

May 2018 - present | Remote

- Led generative and discovery research to support strategy for consumer financial health tools, digital dispute and fraud scenarios, and personalization.
- Championed use of behavioral science principles in research planning and design recommendations which directly led to development of novel feature designs, including a patented spend visualization technique (2020).
- Developed financial management archetypes which explain previously contradictory behavior patterns within segments, allowing pursuit of more meaningful differentiated intervention strategies and metrics by group.

THE BROOKINGS INSTITUTION | RESEARCH SCIENTIST

April 2018 - October 2018 | Philadelphia, PA

- I performed cross-sector field research with Brookings' Center for Universal Education's "Millions Learning" project.
- Stakeholder analyses and semi-structured interviews to identify and synthesize Philadelphia's movement towards becoming a "playful learning city."

OPPORTUNITY EDUCATION | RESEARCH ASSOCIATE

Sept. 2017 - April 2018 | Pittsburgh, PA

- Designed protocols for and led qualitative evaluation of student-focused projects for an ed. tech. non-profit.
- Contributed design recommendations from evaluation findings and synthesized research to support learning and socio-emotional growth.
- Org design: Restructured internal communication workflow; integrated theory-based frameworks that improved internal curricula design.

CARNEGIE MELLON | NSF & IES DOCTORAL RESEARCH FELLOW

Aug. 2011 - Dec 2017 | Pittsburgh, PA

- Primary investigator of 3+ research threads focused on designing and evaluating conversational technologies using methods from sociolinguistics, behavioral science, and learning science (authored 20+ peer-reviewed articles).
- Managed teams of up to 10 staff data scientists, designers, and research assistants. Built and managed relationships with charter school partners that allowed on-site evaluations and opportunities for co-design.

AWARDS

2013	Research	Best Paper Award, Artificial Intelligence in Education
2011	Fellowship	NSF Graduate Research Fellowship (#0946825)
2011	Fellowship	IES Interdisciplinary Ed. Research
2011	Fellowship	Achievement Rewards for Collegiate Scholars
2010	Research	Essam El. Kwaie student research award

INVITED TALKS AND DEMONSTRATIONS

2017	Demonstration	Global Education and Skills Forum, Dubai
2016	Demonstration	World Economic Forum, Davos
2015	Keynote	Equity in Tech (RESPECT) conference
2015	Demonstration	World Economic Forum, Dalian
2014	Presentation	Dagstuhl Meeting on Culture & Computing
2011	Keynote	National Center for Women in Computing award ceremony

EDUCATION

CARNEGIE MELLON, PHD

2011 - 2017 | Pittsburgh, PA

HUMAN-COMPUTER INTERACTION, LEARNING SCIENCES

Committee: Dr. Justine Cassell (Chair),
Dr. Amy Ogan, Dr. Sandra Calvert, Dr.
Marti Louw

Awarded Fellowships: NSF GRFP; IES
PIER; CMU ARCS

Thesis: Designing for Diversity:
Rapport and Science Learning with
Bidialectal Virtual Peers

UNC CHARLOTTE, BA

2008 - 2011 | Charlotte, NC

COMPUTER SCIENCE, PSYCHOLOGY

Advisor: Dr. Tiffany Barnes

Honors: University Honors; Computing
Honors; Magna Cum Laude

Activities: President, ACM-W
(2010-2011); Diversity outreach team
leader, STARS alliance (2009-2011)

MISC. PROJECTS

DRAUGHTLAB: (2019 2021)

Research consultant for a b2b b2c
sensory analysis app (craft beer). Lead
user research influenced
development plan, performed
heuristic analyses, helped build
brewery partnerships. With Lindsay
Barr, CSO and co-founder.

EREACH: (2018 -)

Consultant on development of eHealth
delivery alternative for cancer genetic
testing, focused on girls 8-14. Domain
expert on design of emotionally-
sensitive digital tools. With Dr. Angela
Bradbury, Perelman School of
Medicine, U. Penn.

CoDES: (2012-2014)

Designed tech probes to help
in-service teachers reflect on and
address their implicit biases around
language diversity, provided
continuing education credit.

SNAG'EM: (2010-2011)

UX research for a community-building
app designed to promote retention of
women in computer science
undergrad. programs. It was
integrated in 5+ uni departments and
conferences, incl. CHI 2010 (over
5,000+ users).

TEACHING EXPERIENCE

2017	Lead (HE)	Field research: Sociolinguistics in communities
2017	Lead (K12)	Circus Arts (Summer, Irma Freeman Imagination Center)
2016	Lead (HE)	Technology for classrooms and justice
2015	Lead (HE)	Designing empathetic systems
2015	Lead (K12)	Science for Justice (Summer, Assemble PGH)
2014	TA (HE)	Designing interactive systems
2013	TA (K12)	Science student teaching (Urban League Charter School)
2013	Lead (HE)	Culture and computing
2014	TA (HE)	User centered research and evaluation

COMMUNITY ENGAGEMENT

2021	Panelist	JPMC Meaningful Mondays, Queering Design
2018	Performer	Carnegie Museum of Art "FlowState" acrobatic exhibit
2017	Board	Neighborhood Learning Alliance (literacy)
2017	Speaker	Invisible Jazz Labs Science and Dance series
2016	Committee	SRCD's Technology, Media, and Child Development
2016	Project lead	Tech and art for social justice, Assemble PGH
2015	Board	Urban League Greater Pgh Charter School (science)
2012	Service	Judge, Intel regional science fair (2012-2017)

PRESS AND RECOGNITION

2018	Reference (book)	The Art of Screen Time, Anya Kamenetz
2017	Reference (article)	The Economist, Technologies transforming schools (July)
2016	Interview	Huffington Post, Technologies: Speak their language (April)
2016	Interview	MIT Press, Spotlight on Science (March)

SELECT PUBLICATIONS

The effects of culturally congruent educational technologies on student achievement (2013). *Artificial Intelligence in Education*. Finkelstein, S., Yarzebinski, E...Cassell, J. Best paper award.

Through the thin slice looking glass: rapport and co-construction in peer collaboration (2017). *International Society of the Learning Sciences*. Olsen, J. K., and Finkelstein, S.

Love ya, jerkface: using sparse log-linear models to build positive (and impolite) relationships with teens (2012). *Discourse and dialogue*. Wang, W. Y., Finkelstein, S...Cassell, J.

Oh dear Stacy!: social interaction, elaboration, and learning with teachable agents (2012). *Human Factors in Computing Systems*. Ogan, A., Finkelstein, S...Cassell, J.

Rudeness and rapport: Insults and learning gains in peer tutoring *Intelligent Tutoring Systems*. Ogan, A., Finkelstein, S. L., Walker...Cassell, J. (pp. 11-21), 2012.

SNAG: social networking games to increase retention in computer science (2012). *Innovation in computer science education*. Finkelstein, S. L., Powell, E...Barnes, T.

Evaluation of the cognitive effects of travel technique in complex real and virtual environments (2010). *IEEE Transactions on Visualization and Computer Graphics*. Suma, E., Finkelstein, S..Hodges, L. F.

Astrojumper: Motivating exercise with an immersive virtual reality exergame (2011). *Presence: Teleoperators and Virtual Environments*. Finkelstein, S., Nickel, A...Suma, E.

Perceptual comparisons with laterally presented pictures and environmental sounds (2011). *The American journal of psychology*. Goolkasian, P., Finkelstein, S., and Stubblefield, A.