Digital Transformation / Omni Channel
Experience Design

Mark Weinberg
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Channel Sliding Cost Scale

Predictive **Unassisted** **Assisted**

Cost

Digital First

Pre-emptive | Proactive | Self Service Digital First | Self Service MCSS App | Retail Store | Call Center

Access Point
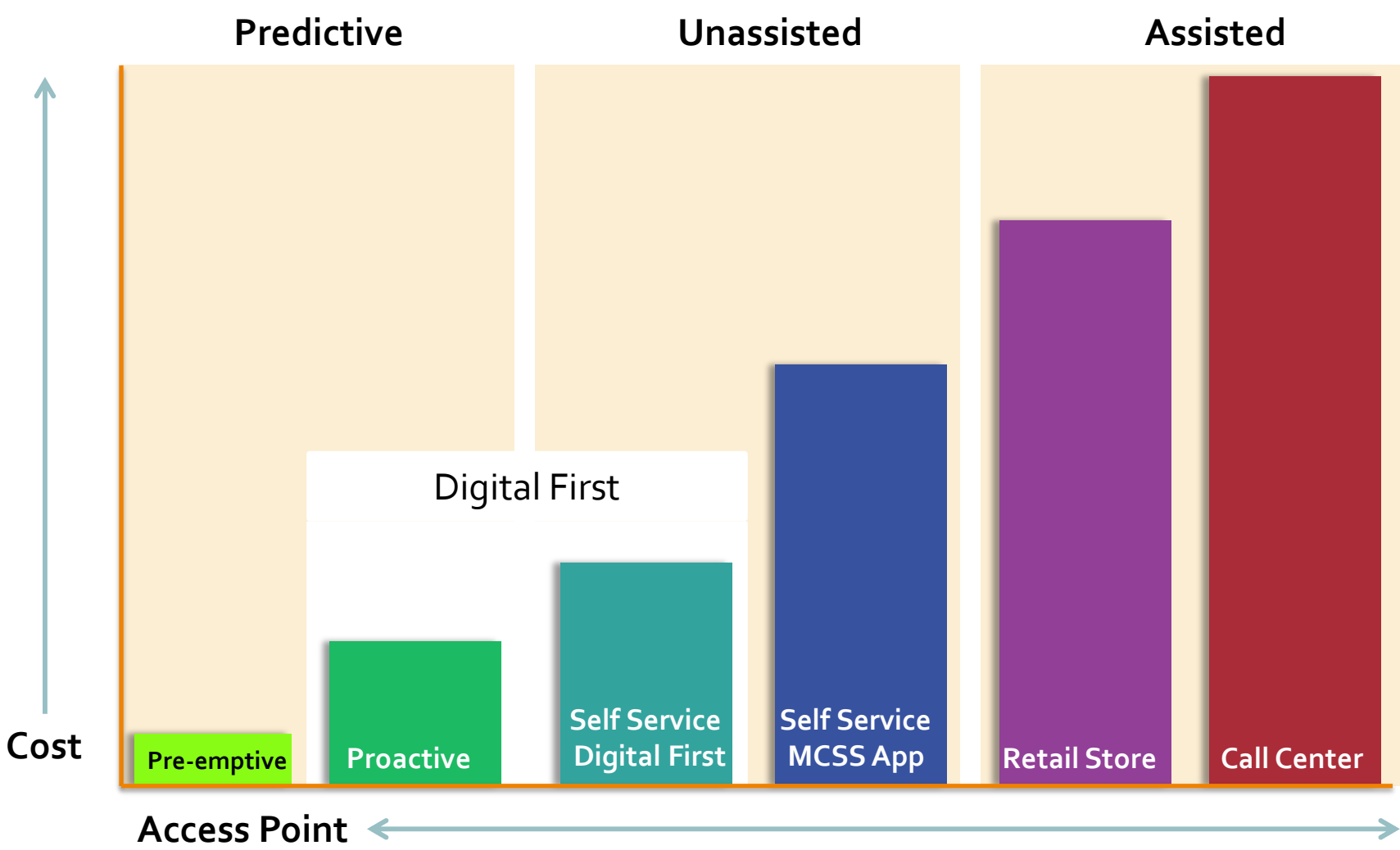
Example: Add roaming to data plan

- Betty is traveling to Europe on August 31st for vacation and to visit family for the month of September

- At dinner, her fiancé Bob advised that she change her *Next* plan while she's away

- She decides to add International Roaming to her data plan for September

Pre-emptive - *Add roaming to data plan*

Analytics-driven (*as a service*)

System arrives at probabilistic offers and actions – relevant to the customer:

- System "picks up" from social media that customer is travelling in September
- System assumes best price plan to the benefit of the customer
- System pushes "one-click" message via SMS, social media, email and other notification:
  Betty, "Next" is glad to offer you special rates for International roaming. Just follow [Add Roaming](#) and choose your dates and roaming options.
- Betty clicks the link and proceeds with *Add Int'l Roaming*

[Add Roaming](#) is the access point to seamless self service . Once ID'd, customers are located in the specific context of their request (Add Roaming to data Plan)

Proactive - *Add roaming to data plan*

Analytics-driven (*as a service*)

System detects that customer is in another time zone (another country)

- System reacts to customer geo-location and reconciles this with customer price plan (detects no Roaming)
- System pushes "one-click" message via SMS, social media, email and other notification:
  Betty, Next together with VodaNext offers you special rates for International roaming. Just follow
  [Add Roaming](#) and choose your dates and roaming options.
- Betty clicks the link and proceeds with *Add Int'l Roaming*

[Add Roaming](#) is the access point to seamless self service . Once ID'd, customers are located in the specific context of their request (Add Roaming to data Plan)

Conventional Self Service – *Add roaming to data plan*

- **Go to WWW.MYNEXT.COM**
  It all begins by sending customers to an address
  1st barrier to good customer experience

- **Login**
  It proceeds to require a password. "Damn! What was my password again"?
 2nd barrier to good customer experience

- **Locate context and functionality**
  "where do I find my data plan and the option to add roaming charges?"
  3rd barrier to good customer experience

- **Add International Roaming to data plan**

The biggest barrier to self service adoption is not the self service application itself, but direct accessibility and navigation to the specific customer need/requirement
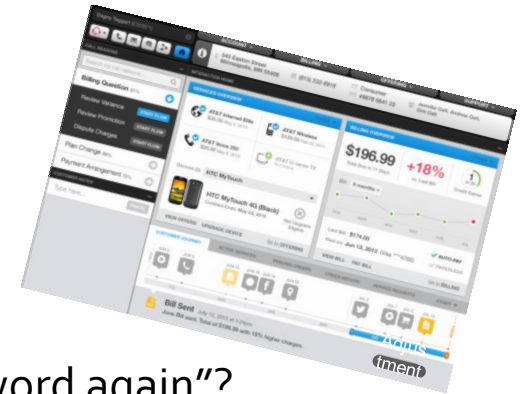
Digital First – *Add roaming to data plan*

Customer knows what she needs/wants.
Says it straight to her smartphone

Next, please add roaming to my data plan

Biometric ID(retinal scan)

Hi Jenny, you requested to modify your *Next* data plan, please look at the ID circle on your screen

Corresponding display on screen

OK. There are two International roaming options:
1. 60MB   - $30
2. 120MB - $50
 Please say 1 or 2

Two

Please say (or select) the start date

September 01, 2014

Please say (or select) the end date

You have selected 120MB from 09/01/2014 t0 09/30/2014 at the rate of $50
Please say" Confirm, or Change

September 30, 2014

Confirm

System Confirmation, Email, etc.

Voice User Interface – *Add roaming to data plan*

VUI has become a significant UI with advantages specific to the auditory medium

Next, I need to add international roaming to my data plan for the month of September

Interactive voice dialog with system (audio prompts)

VUI

GUI

Multimodal interaction

Customer ID (biometric)

Direct access to applicable screen (information, functionality)
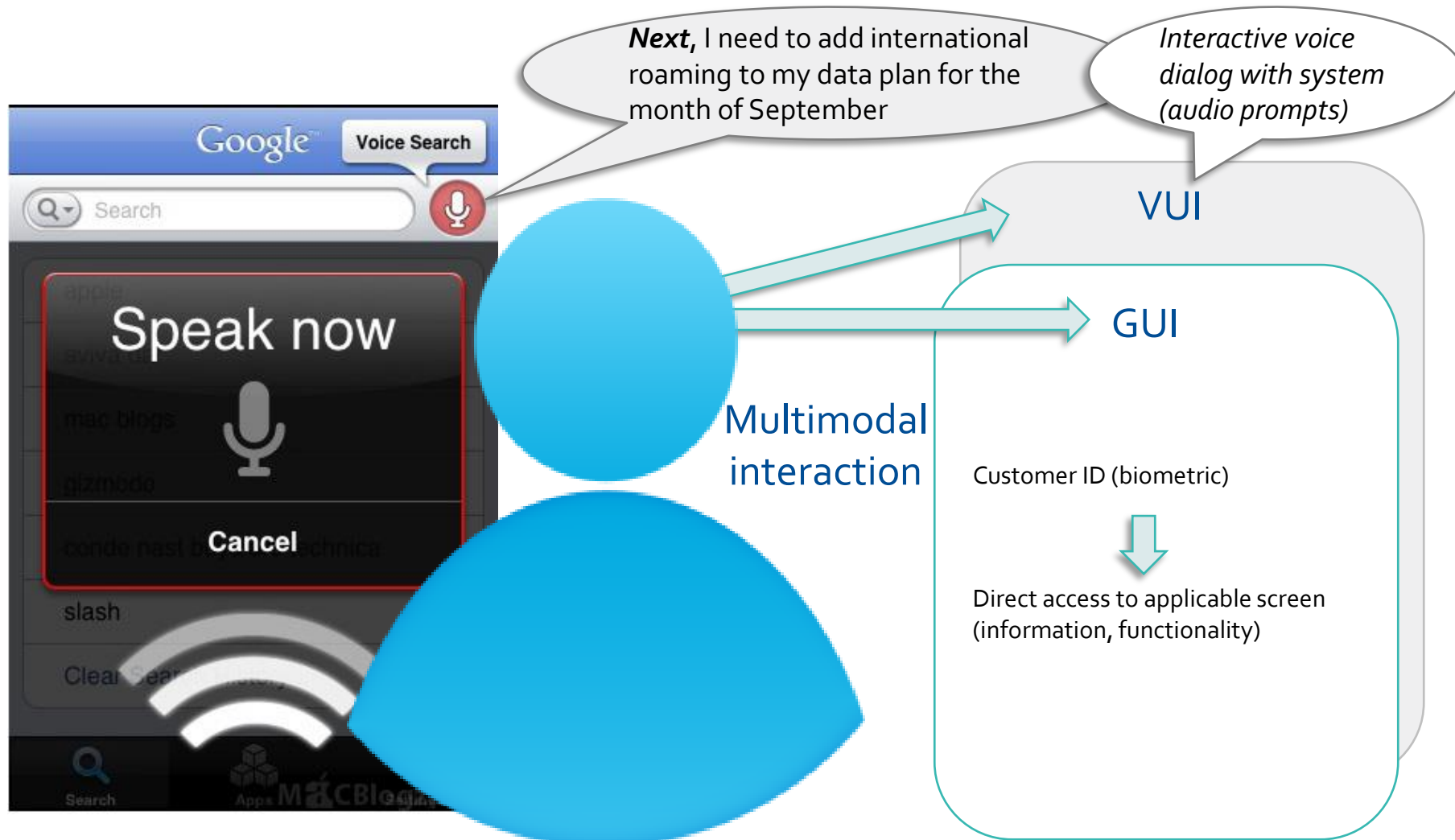
Voice User Interface (VUI) – *As a digital service*

Totally mobile self service

IVR	Speech Recognition (speech to text)	Voice Commands

Hands free - not constrained to using a keyboard for data entry
- not constrained to holding a smartphone or tablet

Eyes Free - not constrained to a screen

Direct Access - no need to navigate somewhere to do something

Flexibility - GUI, VUI or a combination of GUI and VUI (multimodal interaction)

Adoption - seamless migration from conventional self service

Efficiency - specific tasks/services, direct access, minimal navigation

Anything, Anywhere, Anytime

Example:

I want to upgrade my phone - Omni Channel Experience

Jackson is an Optus customer on his Mum's account
- Seeing his friends buy new phones sparks Jackson's desire for a new phone
- He currently uses his Dad's old iPhone and would like to get a more up to date version

Promote | Research | Shop & Pickup | Validate | Notify | Feedback

Web — Jackson logs in to the portal to check out accessories and chats with an agent who also asks him how everything is working out, questions, etc.

TV

Contact Center

Store — Retail Agent picks up wish list, provides device and goes through gaming functions | Retail sets up auto direct debit

Catalog — Upgrade Offer & personalized Choices | Compare devices, Send to wish list, Save

Mobile — Login to Spring Digital Portal | Authorization and monthly contribution from Mum | Retail Agent assigns best price plan for Jackson (based on Tablet usage)

SMS/Chat — SMS to Mum to update his profile Payment method | After 19 days, alert at 90% data usage per preference request

Social — Friends discuss the amazing new iPhone in a FB thread | SMS summary and confirmation to Mum

UX Strategy and Design Heuristics

Accessibility - Do what you require, need or want - directly and by means of a single action or command: when you want and from where you want

Intelligent Automation - Don't expect from customers that which the system can do for them or on their behalf

Context - Provide required context (information /action), when it is required and where it is required: no more and no less!

Real World - Design for the real world probable cases of use as validated by operational statistics, observations, analyst studies, task efficiency and interviews/surveys

Reuse - frameworks, widgets, patterns, branding, etc. as much as possible without compromising optimal customer interaction

Digital First – *Compelling business case*

Seamless migration to, and increased adoption of self service

Do what you need/want directly, without having to navigate and locate

Call deflection from contact centers

Every successfully delivered (and used) service is one less call to the call center

Reduction in abandonment rates

When accessing and executing a task is seamless and easy, the chances of successful task completion is greatly increased

Increased customer service and satisfaction

Customer empowerment + successful outcome = customer satisfaction

Pinpoint optimization and operational efficiencies

Enhancements and optimization are service/task specific and while they require a platform/framework, they are not dependent on an official version release or service pack

AHT reduction when applied in the call center

Digital First can be applied to assisted channels (to enhance or replace quick actions)

Maximum ROI

Specific need/want/requirement ➔ specific solution (not systemic solution)

Reduction in learning curve

Specific tasks, direct access, direct manipulation, minimum barriers

Increased up and cross sells

Sales, promotions and campaigns are also packaged as specific services

Digital First – *Compelling business case*

Current vs. Recommended

The immediate value add of *Digital First* services can be measured by comparing current end-to-end tasks to recommended end-to-end tasks

- ✓ Reliable means of predicting performance improvements
- ✓ Excellent tool to optimize tasks and process flows
- ✓ Diagnostic tool to identify defects and issues
- ✓ Essential UX aspect of the business case

Task flow analysis (E2E Flows)	User intentions (steps) and system responsibility (displays) Similar to use case narratives (including alternates and exceptions)
Efficiency and Task Visibility metrics	-Essential Efficiency measures actual steps vs. optimal -Task Visibility measures the fit between the visibility of features & the capabilities needed to complete a given task or set of tasks -Task Efficiency = (Essential Efficiency + Task Visibility)/2
Expected efficiency improvement	- Comparison between current efficiency vs. proposed efficiency - Expected % improvement - Task Efficiency is applied to KPIs

KPIs – *Partial*

Call Center
Inbound calls by reason codes

- AHT

- FCR ("done in one")

- Transfers

- Hold Time

- Call Volumes

- Call Frequency

- Screens Traversed

- Repeat Calls

Self Service
Task click through

- Task Completion Rates

- Drop Off Rates (Abandonment)

- Server Logs

- Task Volumes

- Task Frequency

- Click Through Rates

- Screens Traversed

Usability Study

Observation & Subjective Study

- ✓ Observing actual users in their real-world operational environments

- ✓ Interviews and Surveys (*users, supervisors, managers, executives*)

- ✓ Measuring user satisfaction (*SUS*)

Diagnostic

- ✓ Expert Usability Review (identify issues and defects; recommend solutions)
- ✓ Task Analysis and Flow Optimization (UC Analysis, Interaction Design)
- ✓ Standards and Best Practices
- ✓ Information Architecture (navigation, structure, taxonomy & visualization)
- ✓ Heuristic Evaluation

Summative

- ✓ Usability Metric Study (Task Efficiency, Task Visibility, Layout Uniformity)
- ✓ Operational Statistics (e.g. task frequency, repeat caller, etc.)

Validation

- ✓ Demonstrating improvements (before vs. recommended)

- ✓ Simulated scenarios of use with actual users (testing recommended solutions)

Orientation *Outside-In and Inside-Out complimentary design*

OUTSIDE IN	INSIDE OUT
Personas Psychographics - personality, values, opinions, attitudes, interests, and lifestyles	User Profiles Customer profile (billing, equipment, Account...), history, roles, online behavior
What customers need to do	Business Requirements, Functional Requirements, NFRs (especially usability)
Narrative of what actually happens Pathways describing expectations of the system	Interaction design Use Case narratives (Customer vs. System)
What customers actually want; How they feel	UX, customer centric prototypes Usability, information architecture
What the SP needs to do to enable this experience	What the system needs to do to empower the SP to enable this experience
How customers relate to the system	How the system relates to customers
Customer Readiness & Validation	Development Readiness & Validation including widget design and Adobe experience manager design readiness