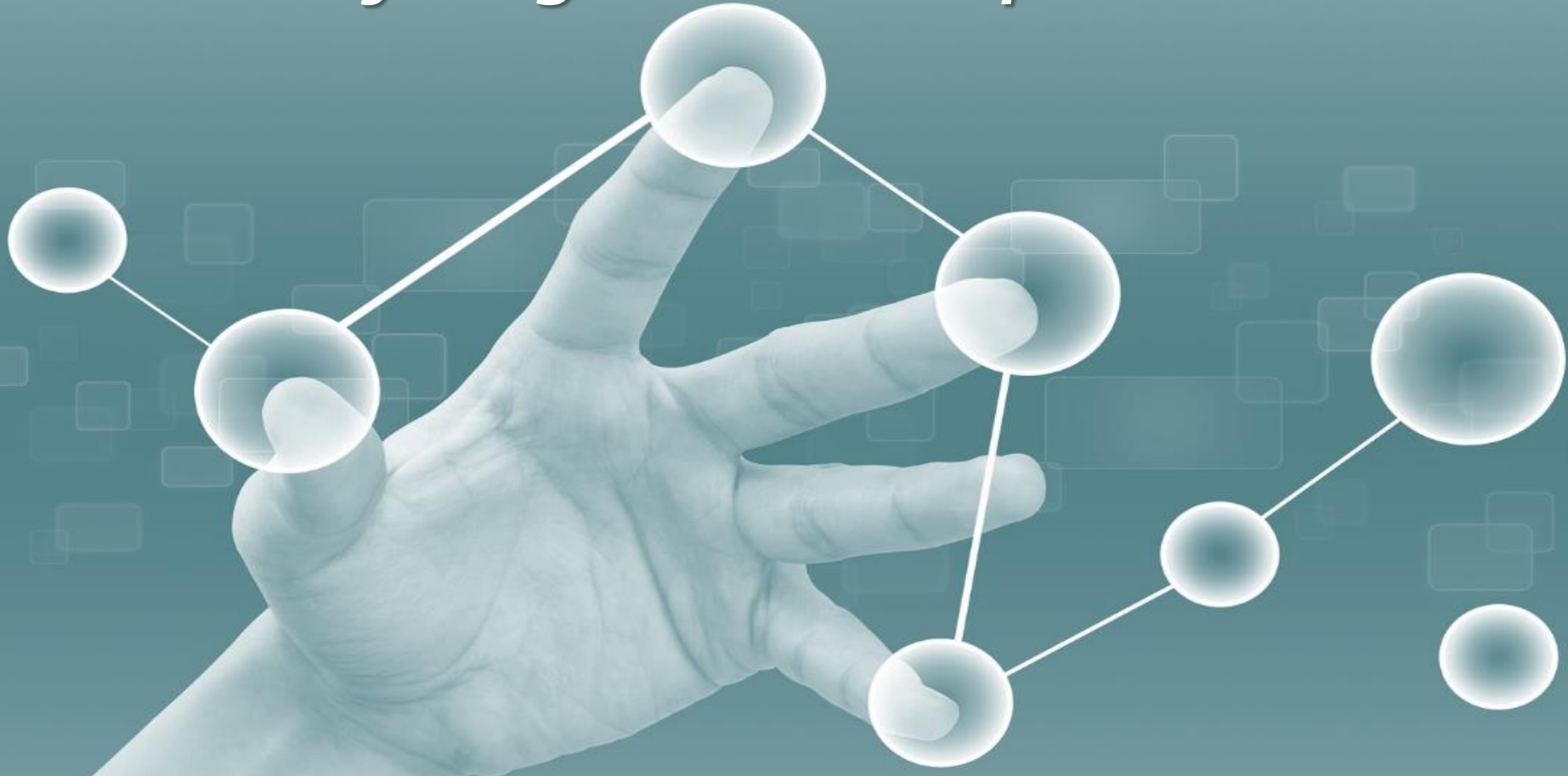


Insight Experience Design

The ROI of Insight Driven Experience



Mark Weinberg
February 2013

Experience: Simple, Effortless, Intelligent, Satisfying!

Example: *Keeping Warm!*

Simplicity / Satisfaction of Use



- Maximum User Effort
- Time Consuming
- Inefficient



- Medium User Effort
- On Demand
(+ maintenance)
- Limited Efficiency

Sensors and Preprogramed
(Temperature is always just right!)



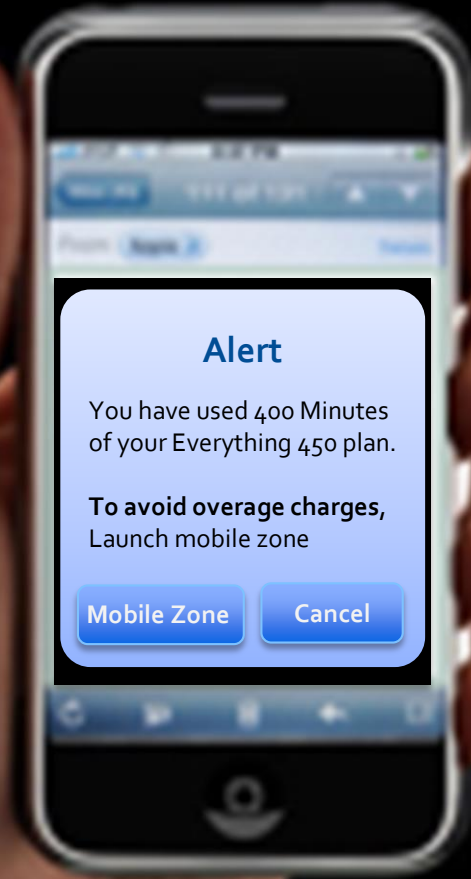
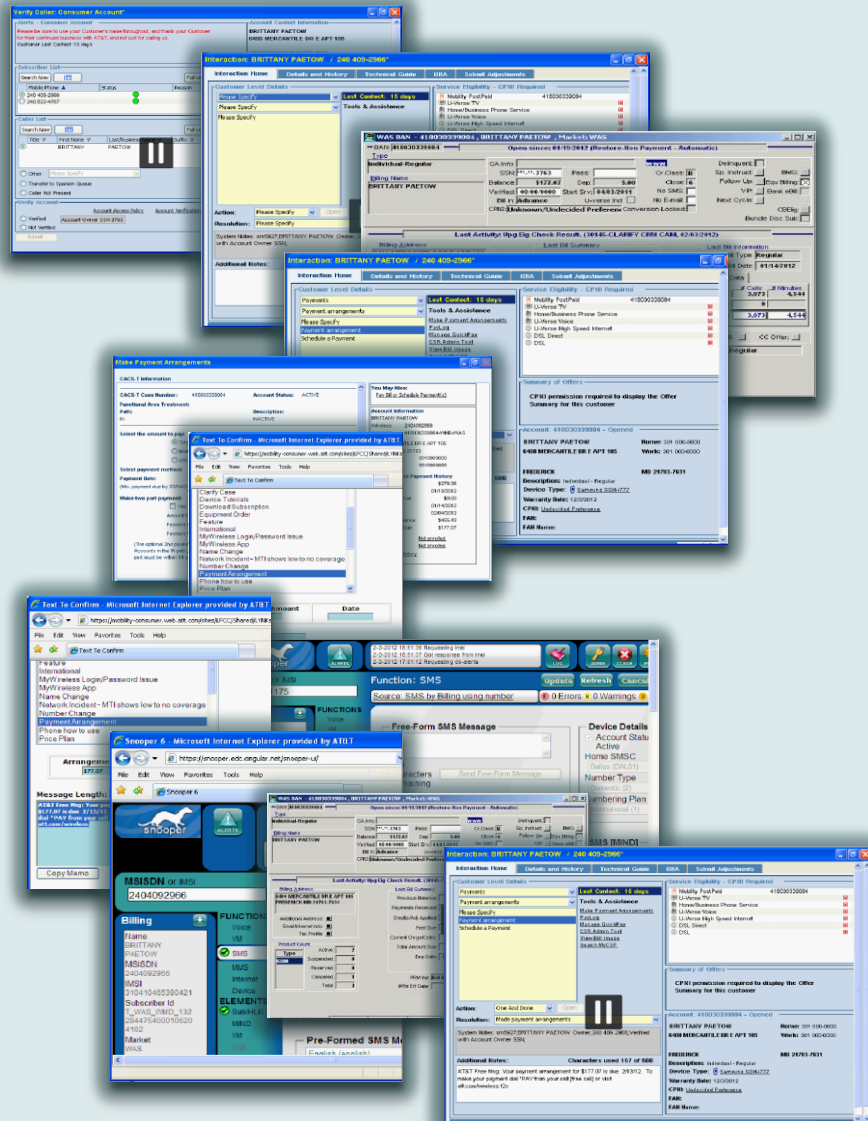
- No User Effort
- "Invisible"
- Highly Efficient

Built-In Knowledge/Intelligence

From this ...

To this

Put the knowledge in the system



Alert

You have used 400 Minutes
of your Everything 450 plan.

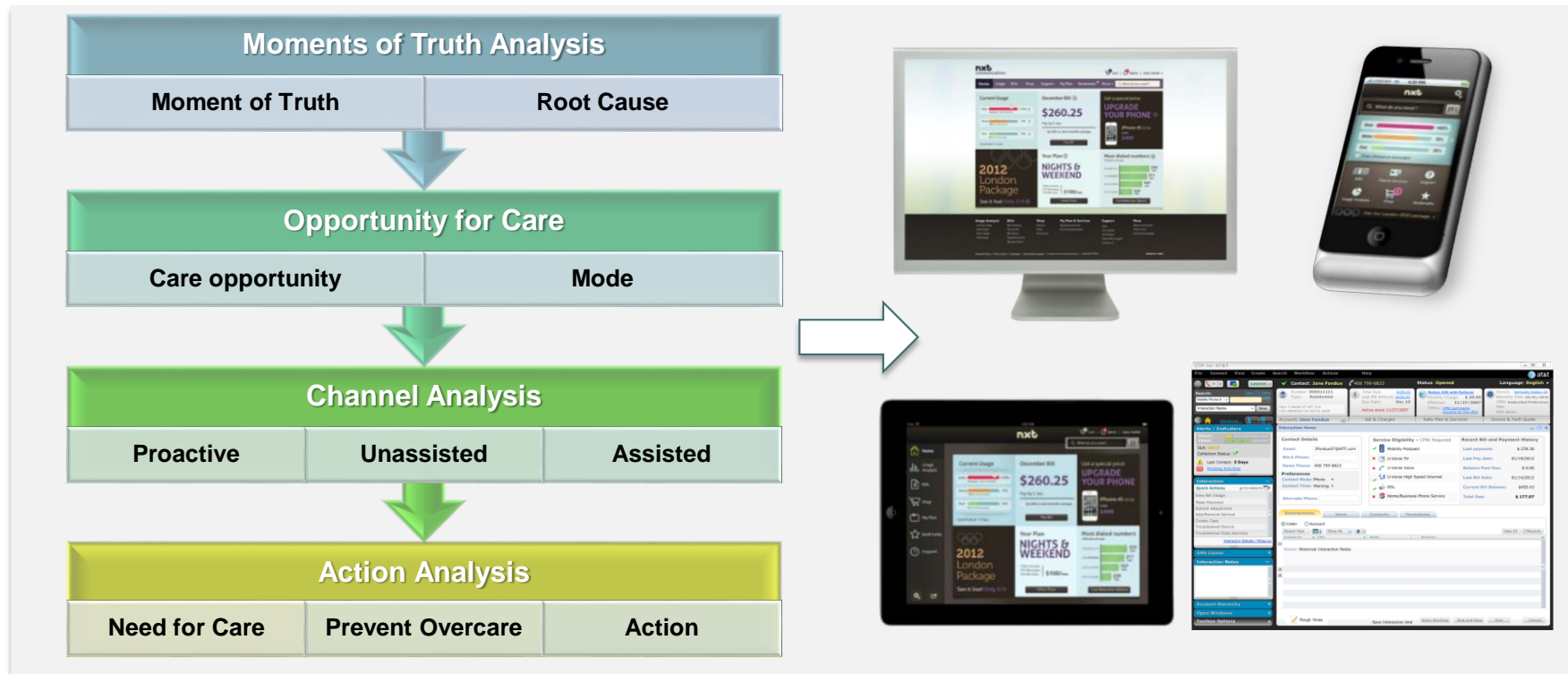
To avoid overage charges,
Launch mobile zone

Mobile Zone

Cancel

What is the Insight Experience ROI Model?

- Insight Centered Design is an agile **experience design process** and part of the **end-to-end customer engagement model and methodology**
- It provides **optimal user interaction experience solutions** – across channels
- It **measures the user/customer experience**
- It **quantifies the benefits** and value add from current to recommended



Compelling Business Case

Insight Proactive Care ROI

Business Models and Year 1 Benefit

Product Positioning	Year 1 Benefit		
	Probable (Pilot)	Least Optimistic	CBG
Mobility - Proactive	\$21.80 M	\$10.40 M	\$13.9M
Mobility - Proactive + SS + CC	\$68.40 M	\$44.70 M	
U-Verse - Proactive	\$4.70 M	\$3.80 M	\$3.0M
Mobility/U-Verse - Proactive + SS + CC	\$78.40 M	\$53.30 M	

- Volume metrics and statistics are gathered from mobility and mapped to Insight root causes
- Detectable calls are computed
 - Where Insight knows the root cause in advance
- Population of detectable calls where customers impacted by a specific use case are identified
- Probable effectiveness for that population is estimated for each use case for each root cause
- AHT savings are computed using recorded call mappings of time from actual calls
- The #calls shed , #Deflected and AHT time savings are converted to \$ using \$8/call

Calls Deflected
Calls Shed
Predicted Flows

ROI
Projected Savings
Current vs. Recommended

Customer (User) Loyalty (Satisfaction)

- ✓ SUS (User Satisfaction)
- ✓ NPS (Customer Loyalty)

Sales & Opportunities Increase

UX Flow Optimization
AHT Reduction
Training Cost Reduction

Insight Experience Improvement ROI

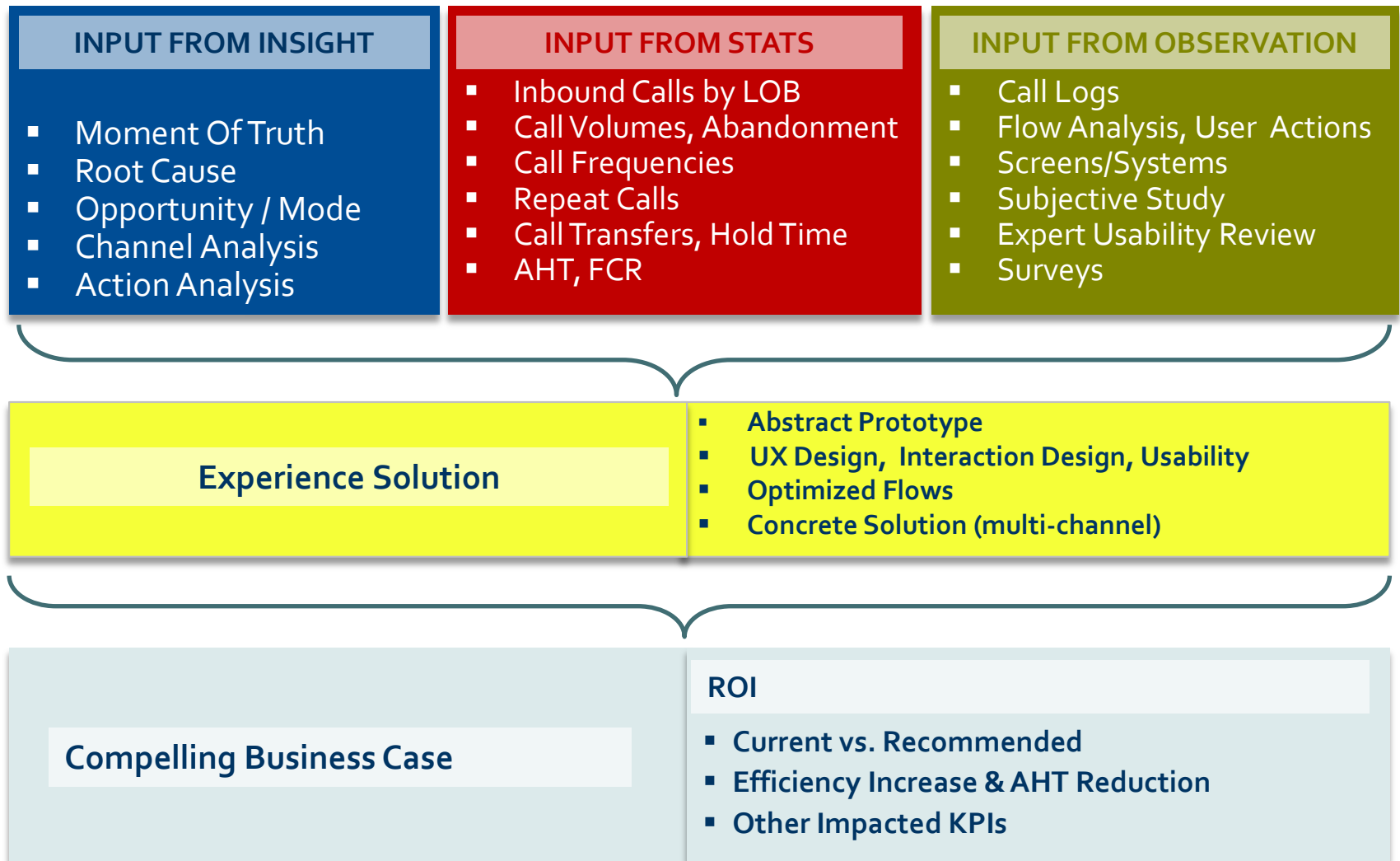
Savings of > \$100M in 1.5 years (prior to 9.0 rollout)

Flow	July '11 Call Volume	% of Calls	AHT Reduction	Savings/Month
	(M)	%	(s)	(\$M)
Start Interaction - Generic	19.32	80%	28	5
SMS Post Call Notification - Generic	3.62	15%	82	2
Change Rate Plan - Specific	3.62	15%	39	1
Review Billing Information - Specific	4.11	17%	9	0
Service Outage - Specific	2.66	11%	109	2
TOTAL				9

Based on a Task efficiency Study of 5 frequent end-to-end flows

- ✓ Call frequency for July '11 is a representative month
- ✓ Start Interaction improves 28s for 90% of calls
- ✓ SMS Post Call Notification improves 54s for 20% of calls
- ✓ \$.50 in call handling cost per minute

Insight Experience – HL Process



Scope of Insight Experience

Customer/User Needs

Insight Root Cause Analysis and Actions per Channel

Pre-emptive

Proactive

Self Management

Assisted

INSIGHT EXPERIENCE

(Repository of Widget-Library based UX solutions)

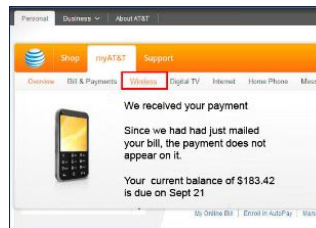
Auto fix



IVR



Web



SMS/
email



Call center



\$ Cost

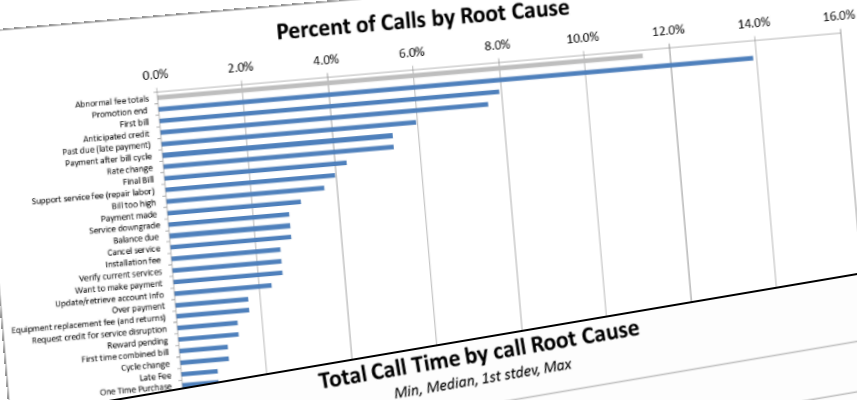


Insight Experience – Activities & Services

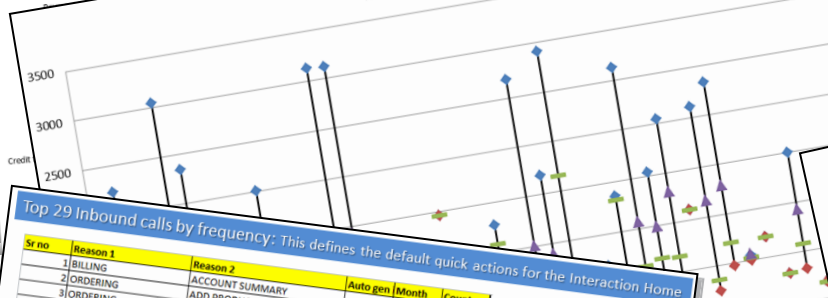
Activity	Description	Deliverable	Comment
Customer Engagement - Site Visit, Observation, Elicit Data/Information			
Subjective Study	SUS (User Satisfaction)	SUS Score in %	Industry Standard
Expert UX Review	Heuristic Evaluation, Standards	UX Worksheet	Best Practice
Surveys and Interviews	Customer/User Needs Analysis	UX Worksheet	All levels
Call Logs / Recordings	Side-By-Side observations	UX Worksheet	Part of Insight Process
Analysis & Design			
Analysis Stats, KPIs, Metrics,	Inbound calls by reasons Root cause analysis Quality Reports	Actions in Context UI Framework	UI Framework is driven by operational stats
Flow Analysis	Call Deflection, Shedding Flow Optimization	Current vs. Recommended	Business case
Abstract Prototype	Technology-free optimal UX solution	Abstract PT	Where viable
UX Solution	CRM, Web Self Service, Mobile, Tablet, Social Care	Concrete design solution	Per Channel per scenario
Business Case			
Business Case	Summary of impacted KPIs, efficiency increase, measurable TCO reduction, Estimated ROI	Executive Summary, Insight Experience Solution	UX component of the Insight business case

Insight Experience – Statistical Analysis

Percent of Calls by Root Cause



Total Call Time by call Root Cause
Min, Median, 1st stdev, Max



Top 29 Inbound calls by frequency: This defines the default quick actions for the Interaction Home

Sr no	Reason 1	Reason 2	Auto gen	Month	Count
1	BILLING	ACCOUNT SUMMARY	0	January	977762
2	ORDERING	ADD PRODUCT	0	January	423389
3	ORDERING	CHECK STATUS	0	January	364585
4	ORDERING	CHANGE (UPDATE PRODUCT CON	0	January	253683
5	AUTHENTICATION	FAILED	0	January	192855
6	CASE	NEW	0	January	184762
7	ORDERING	NEW CONNECT	0	January	140451
8	TROUBLE MANAGEMENT	CALLER ABANDONED IVR	0	January	129841
9	TROUBLE MANAGEMENT	TROUBLE CALL	0	January	124939
10	PAYMENTS	ONE-TIME PAYMENT	1	January	120342
11	INFORMATION INQUIRY	PRODUCT/SERVICE INQUIRY	0	January	88255
12	TROUBLE MANAGEMENT	ISAC SOLUTION/ACCEPTED-CALL	0	January	86844
13	PAYMENTS	PAYMENT INQUIRY	0	January	74882
14	OUTBOUND CONTACT	DIRECT MARKETING	0	January	61232
15	ACCOUNT MANAGEMENT	EXISTING SERVICE INQUIRY	0	January	56128
16	TROUBLE MANAGEMENT	TROUBLE CALL	0	January	52523
17	ACCOUNT MANAGEMENT	ACCOUNT CHANGES	0	January	47926
18	BILLING	CURRENT BILL	0	January	44026
19	PAYMENTS	MANAGE PAYMENT PROFILE	0	January	43439
20	COLLECTIONS	REVIEW ACCOUNT	0	January	40758
21	BILLING	ADJUSTMENTS	0	January	37677
22	ORDERING	MODIFY PENDING	0	January	36156
23	RETENTION: SAVE SUCCESS/HSIA;TV		0	January	34628
24	RETENTION: SAVE SUCCESS/HSIA;TV; VOIP		0	January	31407
25	BILLING	MEMO	0	January	30877
26	ORDERING	F&T REQUEST	0	January	28335
27	ORDERING	DISCONNECT	0	January	27603
28	ORDERING	AMEND DUE DATE	0	January	27558
29	ACCOUNT MANAGEMENT	PAPER BILL	0	January	27102

Account Mgt Top 5

336230 9%

Total Calls 3,761,036

Billing Top 5

1108366

Payments Top 5

241640

1350006 36%

Ordering Top 5

1218264 32%

Trouble Mgt Top 5

404332

Case Top 5

195924

600256 16%

93% of inbound calls are distributed among:

- 4 Reason 1's
- Billing & Payments
- Ordering
- Account Management
- Case and Trouble

93% of th

Call Volume

	Number of calls annually	12,000,000	
Cost per call	\$10		
Cost of consumer care	\$120,000,000		
Call Type	Percent of calls	Annual calls	Current Cost of call type
Billing	36%	4,320,000	\$ 43,200,000
Features	17%	2,040,000	\$ 20,400,000
Hardware	0.17%	144,000	\$ 1,440,000
Retention	11%	1,320,000	\$ 13,200,000
Account Management	4%	480,000	\$ 4,800,000
Rate Plan	0.02%	24,000	\$ 240,000
Self Service	0.01%	12,000	\$ 120,000
Policy			

	Percentage	Running percentage
Overage	15.8%	15.8%
Spending Cap	10.9%	26.7%
First Bill	8.1%	34.9%
Abnormal Fee	8.0%	42.9%
Pay Bill	7.7%	50.8%
Payment Verification	7.4%	58.5%
Balance Enquiry	6.6%	65.9%
Recurring Charges	6.5%	72.5%
Unbilled Usage Enquiry	4.5%	77.0%
Bill too high	3.8%	80.8%
Others	2.9%	83.7%
Pre Auth Payment Setup	2.3%	86.0%
A/R Closed - Payment/Aul	2.3%	88.3%
Past Due	2.2%	90.5%
Final Bill	1.8%	92.3%
One Bill	1.7%	94.0%
Anticipated Credit	1.4%	95.4%
Paper Billing - Remove Add	1.4%	96.8%
Bill Reprint	1.2%	98.0%
Spending Cap Payment	0.9%	98.9%
Roaming	0.6%	99.5%
Other payment	0.3%	99.8%
Payment Refund	0.2%	100.0%

Insight Experience – Root Cause Analysis

Root	Average Time (minutes)	Time to Understand (minutes)	% Calls	% Time	Total Calls	Total Time
Promotion end	12.2	3.7	13.9%	15.2%	13.9%	15.2%
Abnormal fee	10.5	3.3	11.4%	10.7%	25.3%	25.9%
<i>Support service fee (repair labor)</i>	11.1	3.3	4.0%	3.9%		
<i>Installation fee</i>	9.0	2.6	2.6%	2.0%		
<i>Equipment replacement fee (and returns)</i>	14.0	5.1	1.7%	2.1%		
<i>Late fee</i>	9.4	4.2	0.9%	0.7%		
<i>Equipment fee</i>	7.6	2.9	0.9%	0.6%		
<i>Activation fee</i>	12.8	2.9	0.6%	0.6%		
<i>Restoration Fee</i>	18.3	2.3	0.3%	0.5%		
<i>Shipping fee</i>	5.1	2.0	0.3%	0.1%		
<i>Inside wire maintenance fee</i>	2.3	1.0	0.3%	0.1%		
First bill	15.0	3.8	8.0%	10.7%	33.2%	36.6%
Anticipated credit	12.4	3.9	7.7%	8.5%	40.9%	45.1%
Past due (late payment)	10.3	3.3	6.0%	5.5%	46.9%	50.5%
Payment after bill cycle	9.2	3.2	5.4%	4.4%	52.3%	55.0%
Rate change	11.2	2.8	5.4%	5.4%	57.7%	60.3%
Final Bill	10.5	2.9	4.3%	4.0%	61.9%	64.3%
Bill too high	13.9	4.6	3.7%	4.6%	65.6%	68.9%
Payment made	4.9	2.3	3.1%	1.4%	68.8%	70.3%
Service downgrade	15.0	3.2	2.8%	3.8%	71.6%	74.1%
Balance due	5.1	1.7	2.8%	1.3%	74.4%	75.4%
Cancel service	14.4	4.6	2.8%	3.6%	77.3%	79.0%
Verify current services	9.1	2.8	2.6%	2.1%	79.8%	81.1%
Want to make payment	4.5	2.2	2.6%	1.0%	82.4%	82.1%
Update/retrieve account Info	4.3	1.3	2.3%	0.9%	84.7%	83.0%
Over payment	7.2	2.7	1.7%	1.1%	86.4%	84.1%
Request credit for service disruption	14.9	5.7	1.4%	1.9%	87.8%	86.0%
Reward pending	11.3	2.6	1.4%	1.4%	89.2%	87.4%
First time combined bill	9.9	3.4	1.1%	1.0%	90.3%	88.4%

“Time to understand” is time authenticating, exploring screens, identifying the root cause

Approximately 10% of the calls are due to bill cycle timing

Thirteen root causes account for 79% of the calls

Insight Experience – Analysis

Moments of Truth Analysis

Root	Moments of truth	Dialog	Actions	Transfer to
Promotion end	1) Promotion about to end and customer does not want bill to increase		Downgrade services (24%) Add promotion (32%) Upgrade services (4%)	
	2) Promotion ended and customer has financial surprise on subsequent Bill	Review Bills	Adjustment (36%) Payment (2%)	Retention (8%)
	3) Promotion ends and Customer receives a second bill	Review Services Review Promotions	Create case (1%) Change autopay (1%)	Tier 1 (3%) Region (1%)
First bill	1) Customer has financial surprise on first bill - Activation fees, Prorates, overage charges, one-time purchases			
	2) Customer need explanation of charges on first bill		Adjustment (93%) Downgrade (4%)	
	3) Customer needs how to interpret the first bill	Review Bills Confirm Services	Change autopay (3%)	Retention (2%)

Root Cause Analysis

Root	Average Time (min)	Average Hold Time (min)	% Calls	% Time	Total Calls	Total Time
Overage charges	11.6	2.5	15.5%	18.5%	15.5%	18.5%
Spending cap exceeded	9.9	1.4	10.0%	10.2%	25.5%	28.7%
Want to make payment	6.0	1.9	9.8%	6.1%	35.3%	34.8%
Abnormal Fee	11.0	1.9	9.3%	10.5%	44.6%	45.3%
Balance due	8.3	2.1	9.1%	7.8%	53.8%	53.2%
First bill	11.2	1.7	9.0%	10.3%	62.7%	63.5%
Payment made	8.7	1.7	6.2%	5.5%	68.9%	69.0%
Unbilled usage inquiry	9.5	1.7	4.0%	4.0%	72.9%	73.0%
Long distance charge	11.9	1.9	3.7%	4.5%	76.6%	77.5%
Anticipated credit	11.5	2.8	3.5%	4.2%	80.1%	81.7%

Proactive Action Plan

Action for each root, moment of truth, channel

Root	Moments of truth (Drivers)	Proactive		Unassisted Channel			Assisted Channel	Routing Skills
		Proactive Self Healing action	Pre-emptive information or education	Intelligent IVR	Intelligent Web	Intelligent On Device Agent	Call Center	
Feature Explanation	Customer has overage looking for better plan	None	Identify habitual overage for financial risk/ likely to churn and recommend feature upgrade	Intelligent upsell feature add Intelligent upsell plan "Are you calling about how new features might reduce the overage charges"?.. I can add x feature and save you	Intelligent upsell feature add Intelligent upsell plan "Are you calling about how new features might reduce the overage charges"?.. I can add x feature and save you	Intelligent upsell feature add Intelligent upsell plan "Are you calling about how new features might reduce the overage charges"?.. I can add x feature and save you	include in FCR Audit Determine alignment to plan Display Plan information	feature explanation
Feature Explanation	Customer has added new feature	None	When Customer adds feature Send Education on feature usage, Configuration, and billing implications	None	Top level			feature explanation

Impact

Quantified KPI	% of calls	Financial impact
Proactive Calls shed	5.40%	\$
Calls Deflected	6.20%	\$
FCR increase	3.80%	\$
AHT Reduction	7.70%	\$
Overall Impact		

Insight Experience – Business Model and Year 1 Benefit

How prevalent is each call type?

How effectively can Insight impact the calls?

Potential effectiveness through each channel

How many calls can we shed?

Root Reason	Call Counts			Insight Functionality				Proactive Notification/Education					
	# Obs	% Obs	# Calls	Insight?	POC?	Detection %	Detectable Calls	Proactive Notification/Education Effectiveness	Popu	Message to Encourage Self-service Deflection	% Shed	Projected Calls Shed	Projected Calls Shed
Bill Plan Overage	1,075	12%	4,168,089	Y	Y	100%	4,168,089	20%	61%	Y	12.1%	504,339	1.4%
Abnormal Fee	1,052	11%	4,079,893	Y	Y	100%	4,079,893	18%	52%		9.4%	381,878	1.1%
Account Termination	896	10%	3,473,569			0%	-	0%	0%		0.0%	-	0.0%
Pay bill	705	8%	2,733,109	Y	Y	100%	2,733,109	10%	35%		3.5%	95,659	0.3%
Payment Arrangement	699	8%	2,709,849	Y		100%	2,709,849	19%	50%	Y	9.5%	257,436	0.7%
Proration/Charge in Advance	620	7%	2,403,818	Y		100%	2,403,818	18%	80%		14.4%	346,150	1.0%

Insight Experience – System Usability Scale & Subjective Study

Use expandable/collapsible [+] [-] icons to the left

Site	Client Care Representatives																																															
Partner Call Center	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	
Demographics Tab corresponds with these numbers (1 - 30)																																																

Software Usability Scale (SUS)

[illegible]

Current SUS	62.65%	10 above 80%	24 below 64%	16 between

Target SUS **80%**

Notes:

#4 scored 90%. Has been at Partner for 1.5 months, shift leader, experience at another company = Possible Bias

Please circle the number that reflects your immediate response to each statement. Don't think too long about each statement. Make sure you respond to every statement. If you don't have an opinion, simply check box "3".

	Strongly Disagree					Strongly Agree
1. I think that I would like to use this system frequently	1	2	3	4	5	
2. I found the system unnecessarily complex	1	2	3	4	5	
3. I thought the system was easy to use	1	2	3	4	5	
4. I think that I would need the support of a technical person to be able to use this system	1	2	3	4	5	
5. I found the various functions in this system were well integrated	1	2	3	4	5	
6. I thought there was too much inconsistency in this system	1	2	3	4	5	
7. I would imagine that most people would learn to use this system very quickly	1	2	3	4	5	
8. I found the system very cumbersome to use	1	2	3	4	5	
9. I felt very confident using the system	1	2	3	4	5	
10. I needed to learn a lot of things before I could get going with this system	1	2	3	4	5	

Insight Experience – Task Efficiency Metrics

Current vs. Recommended

Start Interaction

Current

41%

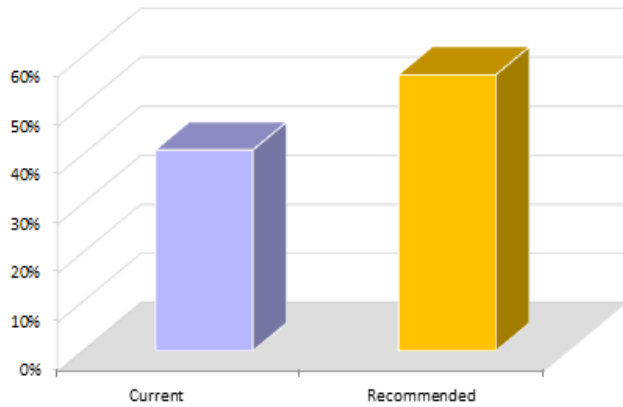
Recommended

56%

Increase - Efficiency

Current to Recommended

37.5%



Change Rate Plan

Current

58%

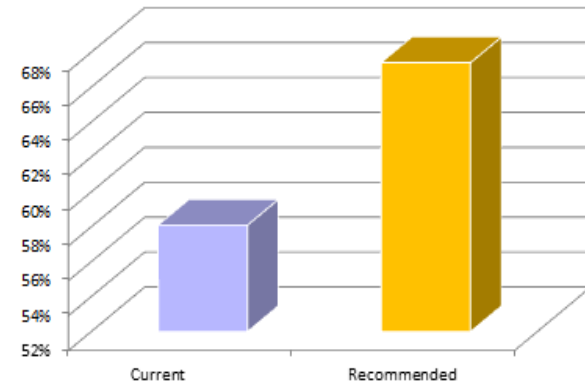
Recommended

67%

Increase - Efficiency

Current to Recommended

16.0%



Post Call Notification

Current

40%

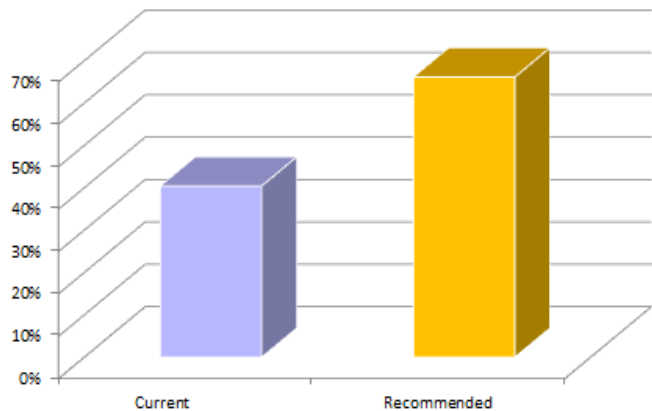
Recommended

66%

Increase - Efficiency

Current to Recommended

63.6%



Review Billing Information

Current

63%

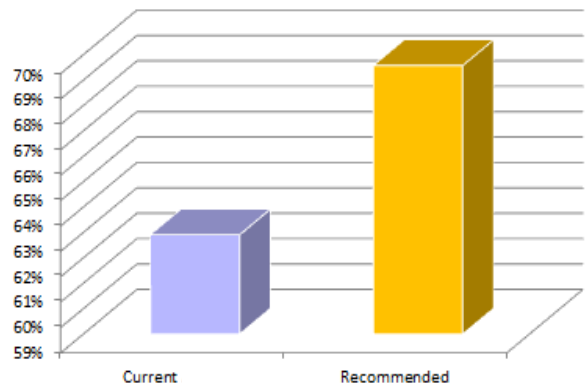
Recommended

70%

Increase - Efficiency

Current to Recommended

10.6%



Insight Experience – Task Efficiency Improvement

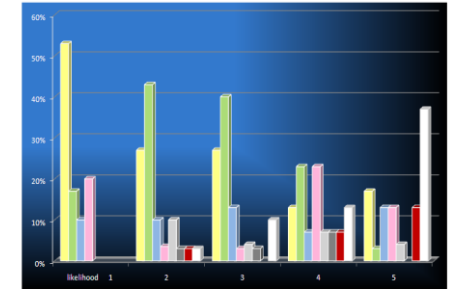
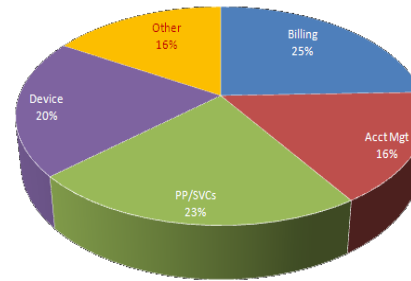
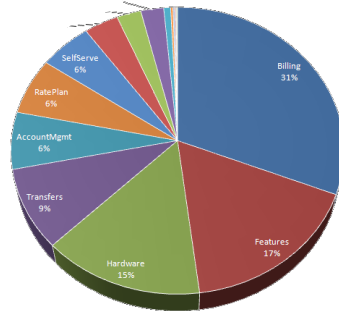
Example

For the task: Post Call Notification:
Recommended is **63.6% more efficient** than existing

EXAMPLE	Existing	Recommended
Steps (User Actions)	39	14
Screens	18	9
Systems	4	1
Task Visibility (TV per step)	52.6%	53.6%
Task Efficiency (EE)	28.2%	78.6%
Overall Efficiency	40.4%	66.1%
AHT Improvement		32% (82 secs.)

From Statistics to UI Framework (Agent Facing)

Inbound Calls by frequency and accounting for 75% - 85% of calls



Context
Reason for Call

Over 11,000 calls logged
(**signal tracker**)

Calls were logged at recent
call center '**side-by-sides**'

30 consumer care agents
were asked to rank the 5
most frequent tasks

**Billing &
Payments**

31%

25%

Very High

1

**Rate Plan &
Services**

23%

23%

High

2

**Hardware &
Device**

15%

20%

Medium-High

4

**Accnt /Sub
Mgt**

6%

16%

High

3

TOTAL:

75%

84%

From Statistics to UI Framework – Actions in Context

Reason Codes

Reason 1

Reason 2

Account /
Subscriber
Mgt

Hardware &
Device

Rate Plan &
Services

Bill, Charges &
Usage

Interaction Toolbox

Notes:

Topic

☐ **Collapse Topic Reasons**

Reason 1:

- Account Management
- Please Specify
- Account Management
- Billing
- Dropped Calls
- Features
- Hardware/Network
- Policy
- Rate Plans
- Retention
- Special Tracking
- Self Service
- Transfer
- Other

Reason 2: Account Mgt

- Status Change
- Update Account Attributes

Reason 2: Billing

- Account Balance
- Disputes
- Explanation/Inquiry
- Payments

Reason 2: Features

- Add
- Explanation/Inquiry
- Password Reset
- Remove

Reason 2: H/W Network

- Broken Hardware
- Device Training/Info
- Explanation/Inquiry
- Outage

Reason 2: Policy

- Dispute
- Fulfillment
- Hardware Upgrade
- Pricing
- Privacy

Reason 2: Rate Plans

- Change
- Explanation/Inquiry

Reason 2: Retention

- Cost of Hardware
- Cost of Service
- Economy
- Explanation/Inquiry
- Irate/Poor Service
- Hardware
- Network/Coverage
- No Need
- Out of Service Area

From Statistics to UI Framework – Actions in Context

driven by frequency/probable case of use

Account /
Subscriber
Mgt

Hardware &
Device

Rate Plan &
Services

Bill, Charges
& Usage

Reason 2: Account Mgt
Status Change
Update Account Attributes

Reason 2: Billing
Account Balance
Disputes
Explanation/Inquiry
Payments

Reason 2: Features
Add
Explanation/Inquiry
Password Reset
Remove

Reason 2: H/W Network
Broken Hardware
Device Training/Info
Explanation/Inquiry
Outage

Reason 2: Policy
Dispute
Fulfillment
Hardware Upgrade
Pricing
Privacy

Reason 2: Rate Plans
Change
Explanation/Inquiry

Reason 2: Retention
Cost of Hardware
Cost of Service
Economy
Explanation/Inquiry
Irate/Poor Service
Hardware
Network/Coverage
No Need
Out of Service Area

The screenshot displays the Sprint CIM interface, which is a web-based system for managing customer information. The interface is organized into several sections:

- Header:** Includes navigation tabs (File, Connect, Create, Search, Workflow, Actions, Help) and a user login status (Peter Newton logged in | Logout).
- Left Sidebar:** Contains a navigation menu with icons for a phone, documents, and an envelope. It also lists various actions categorized by reason (e.g., Account Mgt, Billing, Features, H/W Network, Policy, Rate Plans, Retention).
- Main Content Area:**
 - Account Information:** Displays customer details such as BAN/BCS (113591592), Contact (Jennifer Brown), and address (421 saratoga Avenue, San Jose, CA 95129).
 - Equipment:** Shows equipment details like Equip. SN (334242424) and Services (Wireless Access, PG, Guest Access).
 - Resource Allocation:** Lists resources (e.g., Resource 1 (Active), Resource 2) with their respective details, including Resource Type, SIM/IMEI/ESN, MSN, WiMax Mac ID, Manufacturer, Model, and Possession.
 - Advanced Search:** Provides filters for ALL Subscribers, For PTN (216-244-0525), Network (CDMA), and NAI (X76744043011@SPRINTPCS.COM).
 - Current Interaction:** Shows interaction details, notes, and a topic filter (Account Change, Swap).
 - Swap Equipment/Flip-Flop:** Includes options to Add New Equipment, Add/Remove Services, Change Price Plan, Make a Payment, View Bill and Charges, and Manage a Problem.
- Bottom Bar:** Contains buttons for Open Windows, My Folders, Script Player, Launch, Change Price Plan, and Finish.

From Statistics to UI Framework – Actions in Context

driven by frequency/probable case of use

Account /
Subscriber
Mgt

Hardware &
Device

Rate Plan &
Services

Bill, Charges
& Usage

The screenshot displays the Sprint CIM interface for a customer named Jennifer Brown. The top navigation bar includes links for File, Connect, Create, Search, Workflow, Actions, and Help. The user Peter Newton is logged in. The interface is divided into several sections:

- Left Sidebar:** Contains navigation links categorized by Reason 2: Account Mgt, Billing, Features, H/W Network, and Policy. It also includes a Topic Filter section with various topics and subtopics.
- Top Section:** Displays account information such as BAN/BCS (113591592), Contact (Jennifer Brown), and address (421 saratoga Avenue, San Jose, CA 95129). It also shows equipment details (Equip. SN: 334242424) and service information (Wireless Access, PC Card Access).
- Alerts Section:** Lists alerts such as "Contact within last 5 days", "Open Cases", and "Past Due".
- Current Interaction Section:** Shows interaction details and notes.
- BAN Information Section:** Contains fields for Account Type, Corporate Desc, Status/Reason, Billing Name, Billing Address, City, State, and ZIP.
- BAN Scores Section:** Displays bar charts for Value, Buy, Churn Risk, and Pay Risk.
- Activity Summary Section:** A table listing recent activities, including phone logs, system notes, and notes.

Activity	Create Date	Description
Phone log	1/30/2009 8:10:28	Incoming callContact Phone: 555-787-843: Wanted more info on hardware
System Notes	1/23/2009 09:12:40	Past Due Balance quoted. Customer bypassed authentication. Reason: Offline Support
Notes	1/12/2009 10:45:06	Manager review Notes: For internal use only! Internal notes about Jennifer
Phone log	1/09/2009 13:19:36	Incoming call Contact Phone: 555-787-843: Email configuration support for BlackBerry Curve
Notes	1/03/2009 15:11:54	Customer want to try out device for 10 days before changing PP.
System Notes	1/03/2009 15:10:21	Upgrade Device from Samsung Rugby to BlackBerry Curve

The bottom of the interface features buttons for "Save and", "Keep working", and "Wrap Up".