Call management System for after-sell

I designed a call management system from ground for after-sell service team.

Project brief

Overview

It is a system we developed for after-sell service team to manage customer's profile related to after sell service/product such as insurance

Time

2018.12

Team

Huan Chen (me) - business analysis, user research, UI design

Yan Gao - product management

We started by analyzing users and stakeholders

It is a system **designed from scratch**, so it is important to know the stakeholders at the beginning.

The stakeholders are:

After sale manager-caring about performance data

Business operators- defining the business rules, such as "contacting a customer 60 days before policy ends".

Call center manager- managing the workers, **end user**

Call center staff - the ones who call the customer, **end user**

We collected the business goals the product need to help the team to reach

The high-level goals of the product should reach are：

- A customer is severed by **only one staff** all the time.

- A staff can resolve **multiple cases** by **one call**

We define the goals of users in order to specify the use cases for the system later.

User group	Goals
Manager	Assign cases to staffs
Staffs	Resolve the cases

We defined our design principles

We defined our design principles according to the **feature of enterprise system**, **goal of design** and **needs of the organization**.

User adaption- the system should adapt user's working habit and mental modal
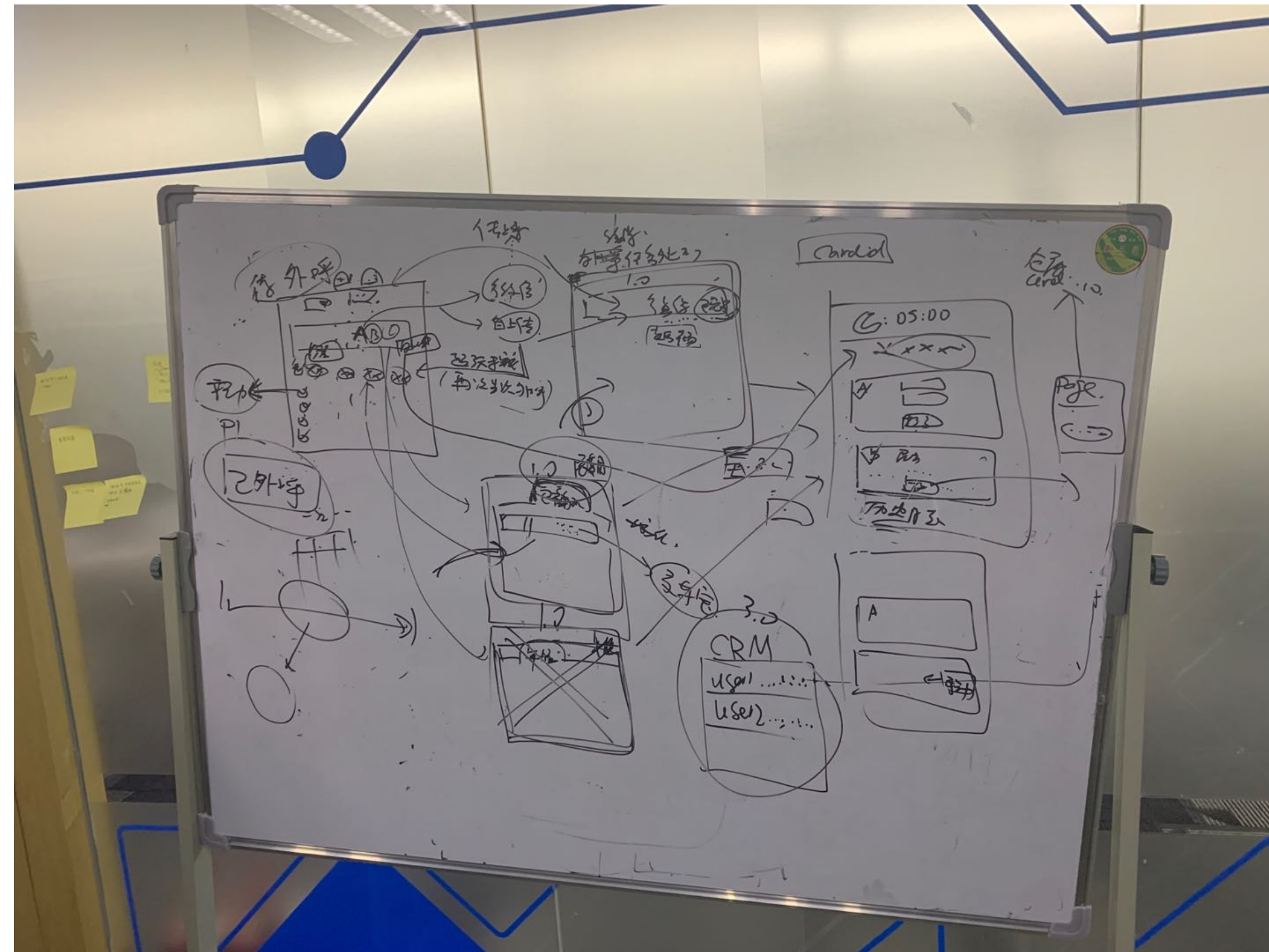
Business impact-the system should help to collect important business data

Scalability- the system can be enlarged for other business cases in future

Efficiency-user can work efficiently while making the phone call

We ideated and discussed solutions in on whiteboard

We ideated solutions with our principles in mind.

We took a field study to understand users better

We observed **how users actually work**, took records of **their dialogues** with customers and **behavior** and analyzed their **behavior pattern**.

We took records of how users communicated with customers and how they updated the information.

对话1

客服：你好，我这回是毛豆新车往的客服，你是.......是吗。你好，你去年有在我们这购买[ ]我送了一年车险，还有20天到期。
客户：这个月24号？
客服：这个车险你办了吗？
客户：我不知道，还没问呢
客服：那这样吧，我们加一下微信
客户：我到期还可以续吗？我不可以自己买吗？
客服：可以，自己买价格高一点。
那我让续保专员加一下微信吧。

If the customer hasn't renew the insurance

↓

Mark as "in process"

We tested our design with users and redesigned with them together.

是否在毛豆续保　　○ 毛豆线下　　○ 毛豆线上　　✓不在毛豆续保　　**Iteration 1**

打算如何续保　　○ 未续保，打算毛豆线上续　　○ 未续保，打算毛豆线下　　✓ 未续保，不在毛豆续保　　○ 未续保，但是没有决定在哪续　　○ 未续保，不打算续保　　○ 已续保　　**Iteration 2**

续保情况

✓ 续保进行中　　○ 已完成续保（在毛豆）　　○ 已完成续保（在其他地方）　　○ 未沟通

○ 在毛豆线上续　　✓ 在毛豆线下续　　○ 不确定　　○ 自己办理　　○ 不打算续保　　**Iteration 3**

*设置跟进时间　　[　　　　　　　　📅]

确定　　取消

We also optimized the information design

Humans can process approximately **7 "chunks"** of information at a time. I divided the supportive information into several segments. Each of them contains no more than 7 attributes of information.

Supportive
information

Personal information

Insurance information

Financial information

基本信息

电话	福州	
联系电话	1378990000	拨打
银行预留电话	1378990000	拨打
上牌城市	北京	
订单城市	北京	
其他联系人	父母	
联系人电话	1278393000	拨打

保险信息

车型	福特 福睿斯 2017
车架号	LMDM29302030
保险到期日期	2018年12月1日
续保工单状态	待上传保单

The screen of the customer profile page.

保存

李明

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金融信息

第 12 期还款日期	2018年12月1日 00:00:00
前 12 期每月展期金额	1000
后 36月每月展期金额	1000
一次性结清金额	1000
总逾期金额	1000
还款状态	未结清

辅助信息

展期优惠券	2000
GPS 状态	是
违章分数	无
违章金额	无

○ 是否本人接听

添加

续保

续保情况

○ 续保进行中   ○ 已完成续保（在毛豆）   ○ 已完成续保（在其他地方）   ✓ 未沟通

展期

是否展期

○ 是   ○ 否   ✓ 未沟通

记录

2018-11-01 19:30:01   陈欢
本人
客户说总部一直没寄大绿本
所以无法过户 12.3号暂住证
就到期了，催尽快处理

2018-11-01 19:30:01   陈欢
非本人
过2天再打

2018-11-01 19:30:01   陈欢
未接通

2018-11-01 19:30:01   陈欢
通话时长 02分19秒

2018-11-01 19:30:01   陈欢
通话时长 02分19秒

2018-11-01 19:30:01   陈欢

We got positive feedback from team leader of after sell

The team leader commented that they system successfully increase the working efficiency of her team and would like us to provide more functions for them.