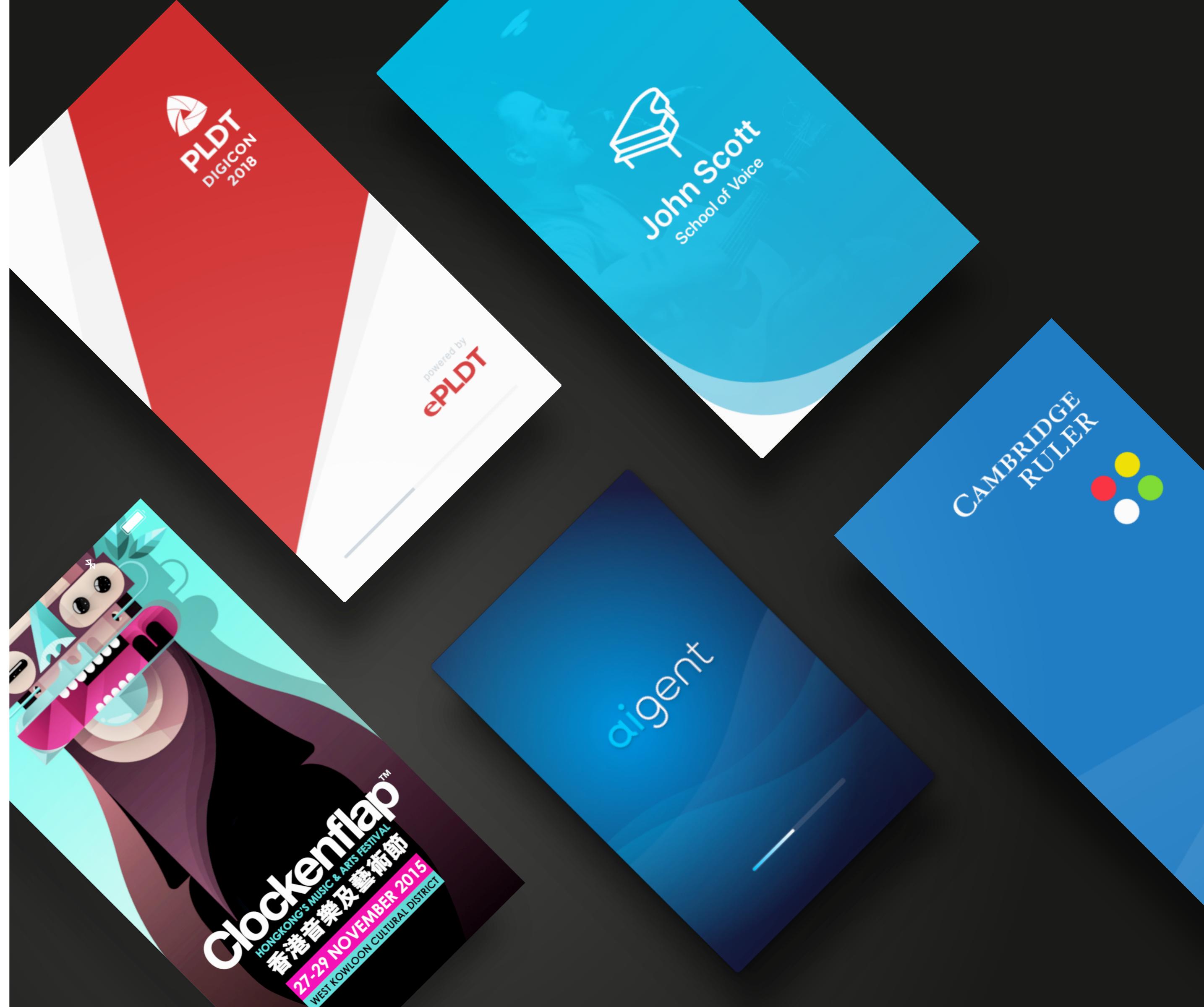


Ellesa Sabasaje

SENIOR EXPERIENCE CONSULTANT

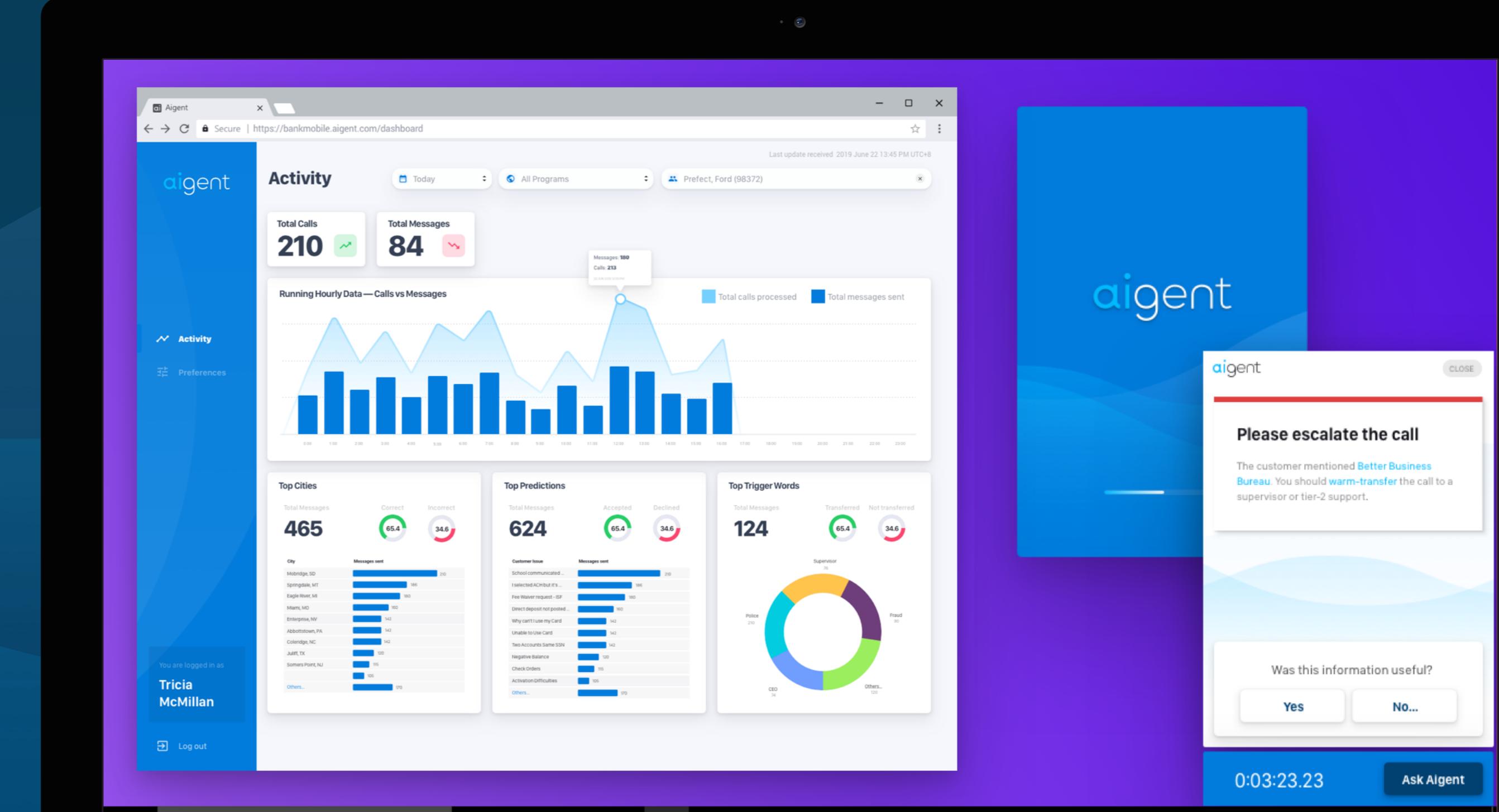
PORTFOLIO / CASE STUDIES



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DESKTOP CLIENT



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PROBLEM

How might we use AI to help new agents resolve calls more efficiently so that they can have happier customers and be operationally ready in a shorter time?

SOLUTION

Create a scalable desktop application from the ground up that analyzes speech in calls and provides contextual guidance and recommendations through a modular messaging system.

METHODS & ACTIVITIES

- Large-scale WoZ Study
- Lean UX
- Kano Analyses
- Design Sprint Facilitation
- UI Design
- Rapid Prototyping
- Design System Development
- Guerilla Research
- Qualitative Usability Testing
- Usability Benchmarking
- Unmoderated User Testing

UX RESEARCHER AND DESIGNER

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SCOPE AND CONSTRAINTS

Building and training AI models take time, and huge amounts of data and resource, so it was imperative that we find a method to rapidly test solutions and features.

Aigent is backed by Ubiquity, which gave us access to hundreds of contact center agents across several accounts, starting with Bankmobile.

I proposed to spearhead a Wizard of Oz testing program with live agents.



FUN FACTS

Call centers have an average turnover rate between 30 and 45 percent.

It costs money to find, hire and train new employees.

Customer satisfaction may wane as callers deal with representatives who are too new to know how to adequately handle problems.

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USERS

I visited the Bankmobile centers in key locations to conduct several user interviews with and shadow a wide range of personnel: agents, their team leaders, operations managers, QA analysts and even their IT department.



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USERS

I was able to understand Bankmobile's operations, and the context of use for the desktop app as well as map out an agent's day-to-day activities and draw up the first provisional personas (proto-personas).

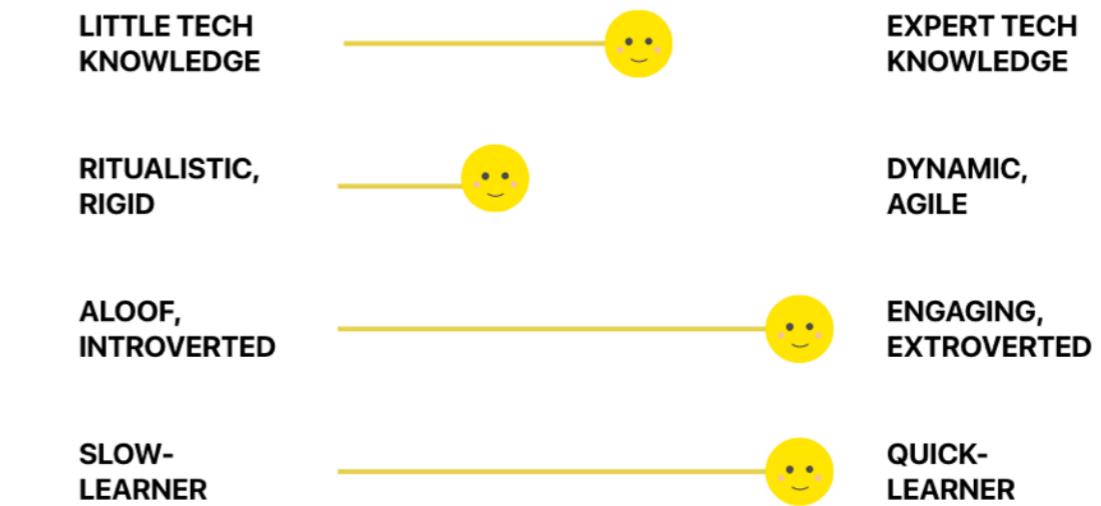


Kyle, 24

**Tier 1
Customer Support
Specialist**

Bankmobile

- 📅 1 week to 1 month tenure
- 💻 Windows user, 16:9
- _ANDROID_ Android user
- 👉 Right-handed
- 👁️ Slightly visually impaired
- 🗣️ Low to average English skills, is trained to deliver spiels but may find it challenging to independently articulate ideas and topics



As a newly deployed agent, Kyle is set to receive simple calls, ranging from balance inquiries to information lookups.

When Kyle has spent 2 weeks answering live calls, his VDN will be changed allowing him to receive more complex calls.

Goals

- Meet performance goals for the month, such as QA, CSAT and ACD scores
- Resolve calls faster, preferably on the first call
- Identify calls for escalation faster, and efficiently transfer them

Pains

- When online and offline tools are very slow
- Difficult customer accents, audio problems
- Unable to find proper resources or floor support to handle complex calls

Needs

- Quick response from team leads or other sources of floor support
- Access to the right KB articles
- Be able to identify problems in communication or compliance and quickly correct them

Design Solutions

- Meet performance goals for the month, such as QA, CSAT and ACD scores
- Resolve calls faster, preferably on the first call
- Identify calls for escalation faster, and efficiently transfer them

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PHASE 1: IDEATION

We conducted a brainstorming session with the cross-functional team in Amsterdam and stakeholders from Bankmobile in Bacolod to come up with a “wishlist” of features.

The team had good hunches on what works and what doesn't.

Backing our decisions with data obtained from a kano study that I conducted over 88 potential Bankmobile users provided a solid basis for my research roadmap for the WoZ program.



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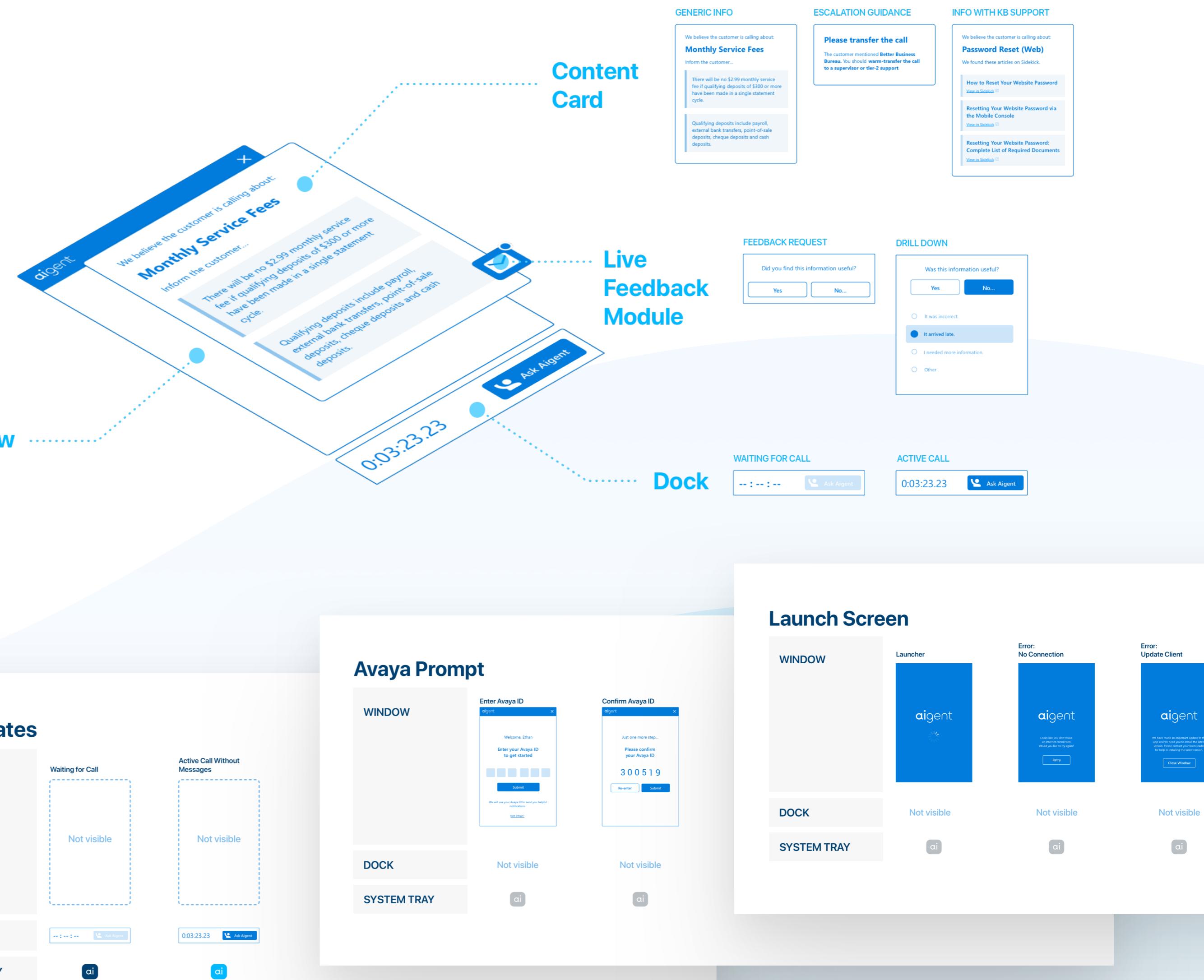
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PHASE 2: DESIGNING THE BASE UI

The next step is designing a modular, scalable UI for the Windows client which will display the messages that the Wizard will be sending to the agents.

Context of use proved to be a challenge to work around, most especially when it comes to screen size. I used the Golden Ratio as a rule of thumb to calculate the right real estate for the app.

Provisions were added to the UI to allow for gathering user feedback on the fly.



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PHASE 3: WIZARD OF OZ TESTING

I collaborated with operations managers to screen 30 agents, 2 team leaders and 5 senior agents for the first leg of program.

The 5 senior agents would act as the “wizards” and are tasked to send supporting messages to the agents while listening in on their calls, using special Avaya equipment.

The curtain is important! Hence, we relocated the Wizards to a different. Special incentives were also put in place to encourage non-disclosure among the participants of the program.



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PHASE 3: WIZARD OF OZ TESTING

While development for the Windows client was under way, I designed a simple front-end system that will allow the Wizards to send messages to the agents.

aigent user research group

Agent Messaging Console

Sean Joseph Ardanez ▾

Name	Avaya ID	Tenure	Phone Extension	Status	Duration	Logged
Cosio, Ramyn Claire	177418	1m 12d	4567	IDLE	00:07:09	-
Tillana, Maria Edna	177208	8d	4234	ON CALL	00:03:45	-
Mirafior, Eva Mariela	176570	1m 12d	2286	ON CALL	00:02:32	-
Jerezza, Anne Georgie	177392	1m 12d	4568	AFTER CALL	00:00:16	✓
De Loyola, Amapola	172712	1m 12d	4572	ON CALL	00:01:03	✓
What would you like to tell Amapola?     					SEND	
Susada, Norbert	172077	1m 12d	4700	LUNCH	00:24:89	-
Cancio, September Joy	177397	8d	4701	HOLD	00:01:34	✓
Cordero, Ma Antonia Carolina	177410	8d	4478	BREAK	00:10:07	✓
Goki, Malou	174262	3w	4479	ON CALL	00:10:21	✓

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CRITICAL PIVOTS, NARROWED FOCUS

I allowed the program to run for a month, ensuring that each test agent was supported by a wizard at least 5 times during a day.

During the course of this study, I combined usability benchmarking with field research methods, such as usability testing, user interviews and unmoderated user testing, with the help of 2 junior analysts.

We found that general proactive guidance proved to be too broad for the AI models that we have, and discovered that it would be more practical to focus on a few key message types.

Show research calendar re:roadmap? Product shots?

Things we discovered:

1. More tenured agents used the Ask Aigent button more than new agents did, due to special VDN assignments put in place by Bankmobile. Re: Tenured agents had access to complex calls, where as newly deployed agents did not.
2. Many agents did not like to be sent the same advice or messages over and over again. We decided to dial back on our solution, and provide support ONLY WHEN AGENTS ASK FOR IT, re: when they click the Ask Aigent button.

To address the “multiple message” issue, several stakeholders presented possible solutions. Re: the value of a message diminishes as an agent’s tenure increases. So how do we keep this feature valuable?

After a second brainstorming session, we found that narrowing the AI’s proactive guidance to opportunities that involve (1) regulatory compliance, (2) soft skills issues and (3) call etiquette compliance. We believed that by helping agents with compliance, we are helping them increase meet their monthly QA targets, and consequently their CSAT targets.

SHOW lean experiment statement

On month 2 of the Wizard of Oz program, we briefed the Wizards to only send corrective messages for dead air, hold time compliance and verbal collisions. I shifted ratio of Wizards to agents from 1:1 to 2:1 — 2 wizards would tap into a call, and sent messages to an agent. However, each Wizard will be assigned a “hat” (one for escalation guidance and Ask Aigent, another for soft skills).

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SHIP AND MEASURE

We went live with the features last
October 2019, just in time for Money
20/20 Las Vegas.

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LEARNINGS AND NEXT STEPS

Many users found the popup too jarring

We found that agents did not like to be given the same recommendations and messages over and over again. This is a problem we wish to revisit in a future iteration.

Show research calendar re:roadmap?

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THANK YOU!

Picture with
transcription team