

The screenshot shows the 'Contact Center' Workflow Builder interface. On the left, a sidebar lists various management sections: My Contact Center, Communication, Task Management, My Workflows (selected), Queue Management, Organization & Team, Analytics & Metrics, and Settings. The main area is divided into two sections: '1. Setting up my Workflow' and '2. Creating Filters'. In '1. Setting up my Workflow', users can enter the 'Workflow name' (e.g., Support Team) and set the 'Task Reservation timeout (in seconds)' (e.g., 100 seconds). In '2. Creating Filters', a user has created a filter named 'New filter 1' with the condition 'Language HAS English'. They are currently adding a second filter under 'and'. Below this, there's a section for 'Create routing steps' where two steps are defined. Each step includes 'Matching Agents' (Queue: Select, Agent expression: Language HAS English-EN), 'Priority & Timeout' (Priority: 10, Timeout: 100 seconds), and an 'Agent expression' field.

## Final Designs

# Smart Workflow Routing Made Simple

## Streamlining the Routing process

Routing setup is usually complex, especially for lean teams. The new Workflow Builder makes it simple, letting users define filters, conditions, and steps in one place, no tech help needed.

With a clear UI and drag-and-drop logic, it's fast and flexible.

*In testing, setup was 30% faster than competitors, and 87% of users completed it without support,* citing clarity and ease as key benefits.

# Failures

- **Setup lacked guidance, causing confusion especially for SMBs** with limited support resources.
- **Early users struggled to understand the primary value proposition of the product.** Without a clear “why” and “when to use,” many defaulted to existing workflows, resulting in low adoption.
- **Urgent calls and standard tickets were mixed** creating confusion during initial interactions.
- **Response suggestions lacked relevance and context,** offering minimal productivity gains for agents.

# Takeaways

- **Start with core messaging channels** (e.g., WhatsApp, Messenger) to drive early value and adoption.
- Leave voice aside for the launch of MVP, it's too complex and hard to have that up running, less is more;
- Agents often juggle multiple conversations and channels. **The interface should allow fluid navigation between tasks without disorientation or loss of progress,** minimizing the cost of multitasking.
- **Focus on automation and productivity without add more complexity** on the user side (integrations with third parties);
- Decrease UI cognitive overload;
- **Optimize for search** and make it central to the experience::