

Customer Experience Management

SAP Service Cloud



Overview

The SAP Service Cloud is a Customer Experience solution to support Service Agents at high volume B2B call centers. The product has faced criticism for its user experience issues and lack of Omnichannel capabilities which is crucial for call centers.

This project focuses on the process of realizing a concept design into an actual product with 500+ active users. The new design was supported by user research with our Innovation Partners and with the help of the insights from the Product Managers.

There were two User Experience Designers and one Researcher involved in this entire design process.

Process



1



Research

2



Ideate

3



Design

4



Test

5



Iterate

Understanding Our User



Michelle Bailey
Customer Service Agent

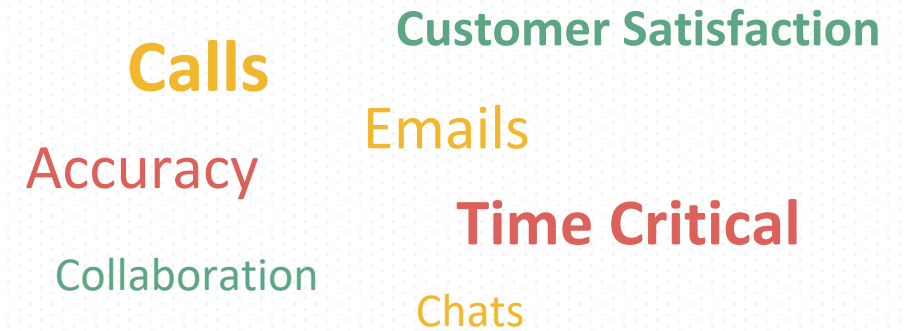
Age : 29

Background: Working as a customer service agent in the Customer Service department at Kixo Services.

Goal : Become the best agent of the month by helping customers with great satisfaction, improved service and getting good reviews.

Device at work : Desktop computer, 32" monitor

Product usage frequency : 100 % of a 8hr working day



Tech Savvy



Data Driven

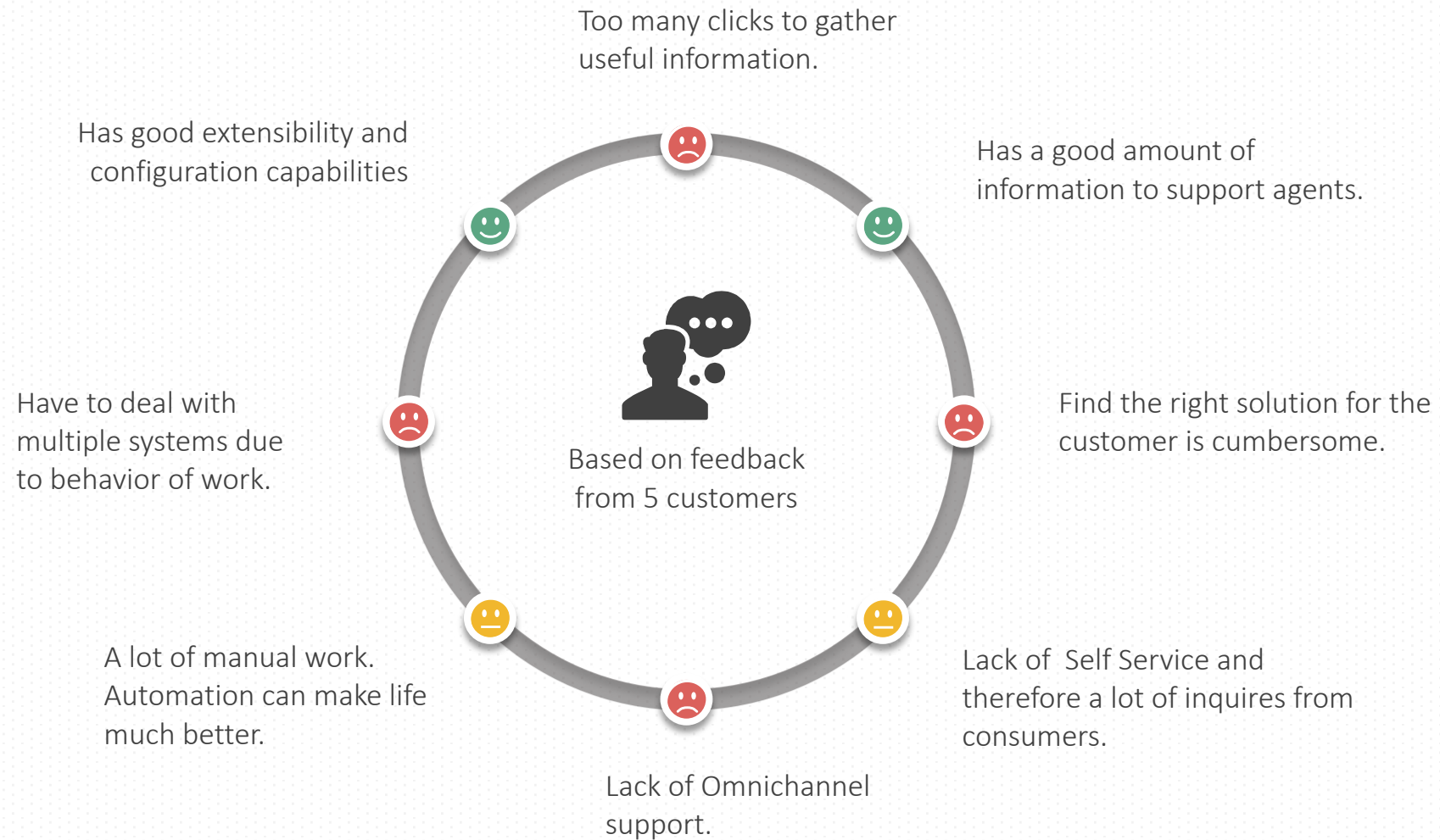


Visually Driven



Research Findings

Based on feedback on old product



Breakdown

Improved experience in terms of getting useful information during customer engagements.

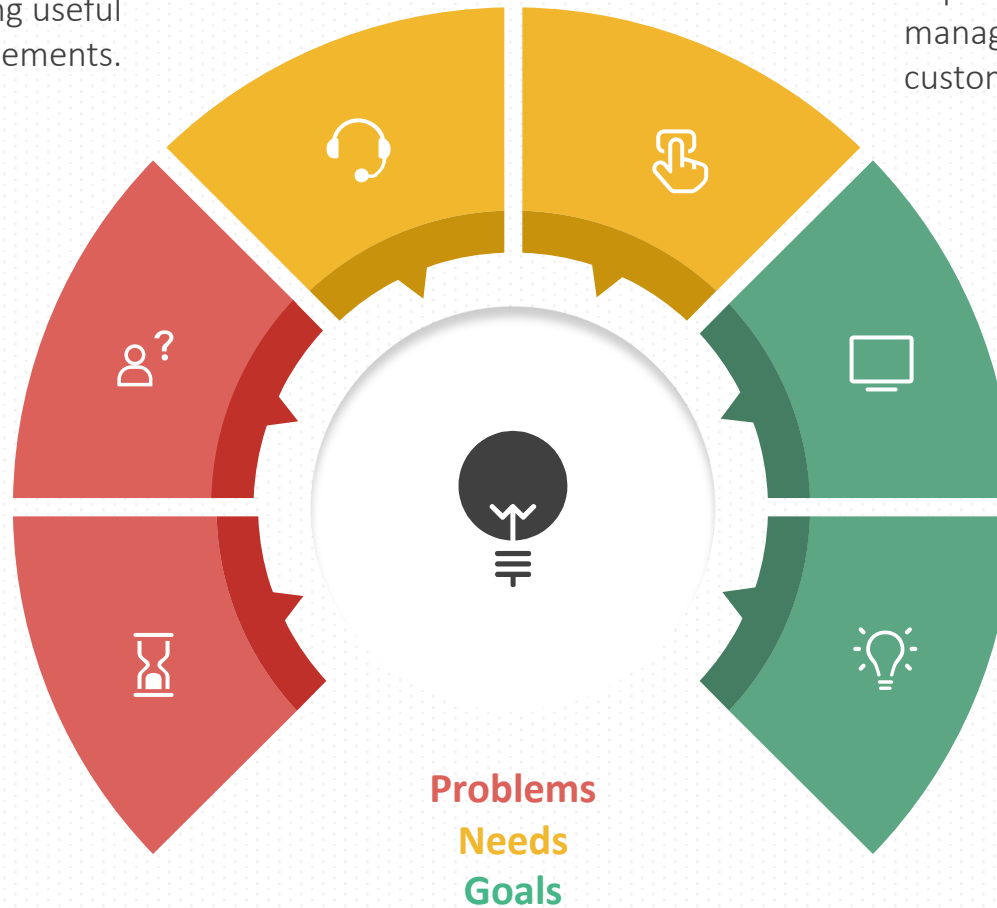
Improved experience in terms of ticket management and providing solutions to customer.

Dealing with a lot of resources to find the right solution for the customer.

Seamless experience in terms of providing useful information and actions along with Omnichannel capabilities.

Disruptive experience for handling customer engagements & tickets.

Smart recommendation and knowledge base system.





Initial Process

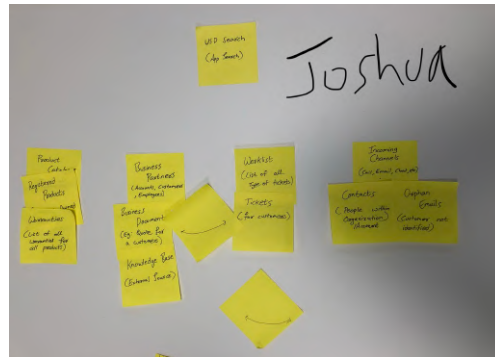
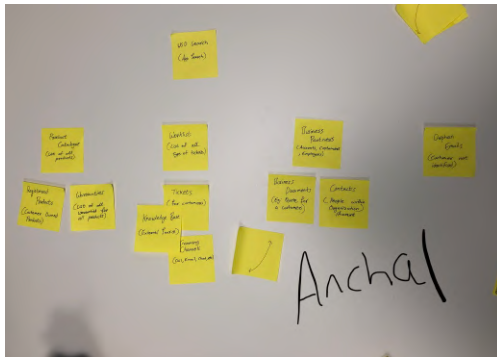
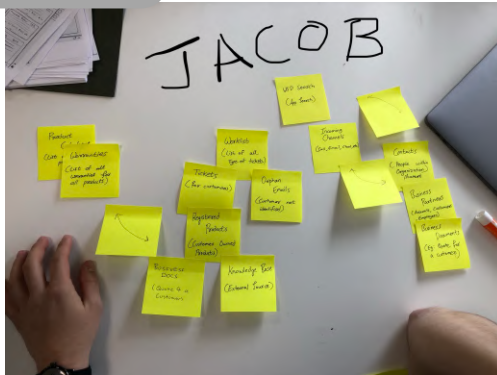
[illegible]

After

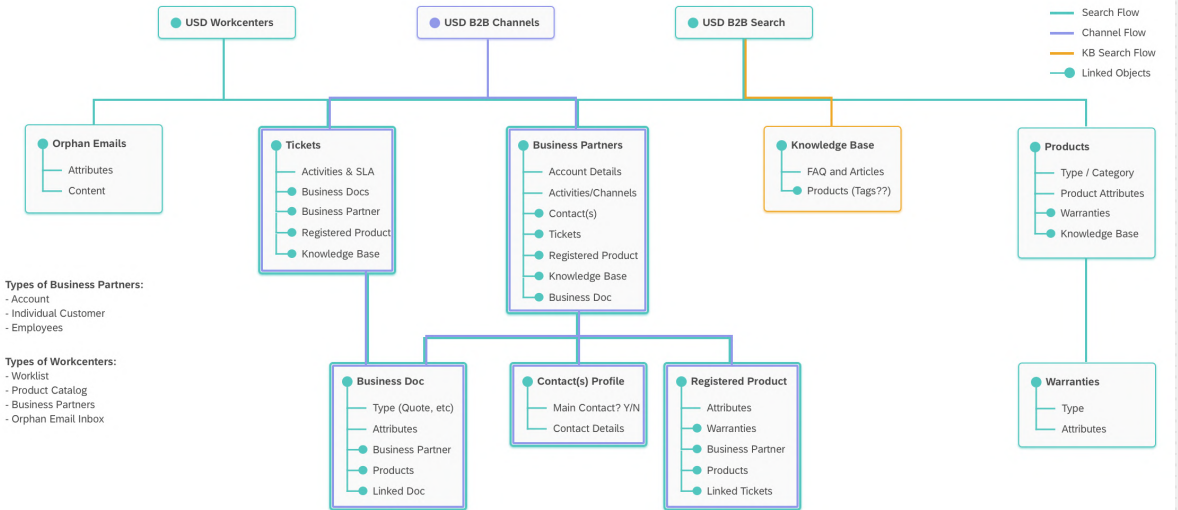
```
graph TD
    Login((Login)) --> Homepage[Homepage]
    Homepage -- "Tickets / Email created tickets" --> OfflineChannels((Offline Channels))
    Homepage --> TurnOnAvailability[Turn On Availability]
    TurnOnAvailability --> LiveActivity[Live Activity<br/>• Call<br/>• Chat<br/>• Video Call]
    LiveActivity --> DetermineCustomer[Determine Customer]
    DetermineCustomer --> Multiple{Multiple}
    DetermineCustomer --> SingleIdentified[Single Identified]
    DetermineCustomer --> Unknown{Unknown}
    SingleIdentified --> Existing{Existing}
    Existing --> QueryQuestions[Query / Questions<br/>(Take notes & add to call)]
    Existing --> CloseTicket((Close Ticket))
    Unknown --> VerifyCustomer[Verify Customer<br/>• Name, Email, Address, Phone<br/>• Other verification details]
    VerifyCustomer --> ConfirmCustomer[Confirm Customer<br/>(Update Info if needed)]
    ConfirmCustomer --> UnderstandIssue[Understand Issue]
    UnderstandIssue --> WrapUpCall[Wrap Up Call]
    WrapUpCall --> Survey((Survey))
    OfflineChannels --> CheckTicketQueue[Check Ticket Queue]
    CheckTicketQueue --> PriorityTickets[Priority Tickets]
    PriorityTickets --> KnowingCustomer[Knowing Customer<br/>• Customer Info.<br/>• Product<br/>• Interaction History]
    KnowingCustomer --> SolveTicket[Solve Ticket<br/>• Reply<br/>• KB, Similar Tickets, Used Solution, etc<br/>• Collaboration]
    SolveTicket --> CloseTicket
```


Information Architecture

Before

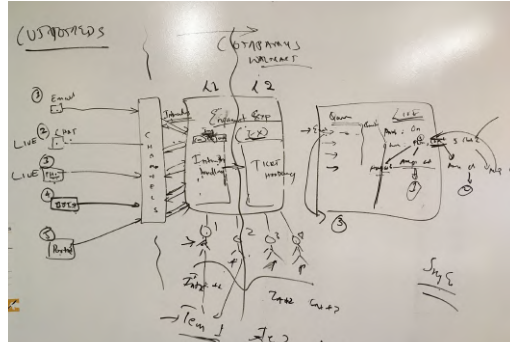
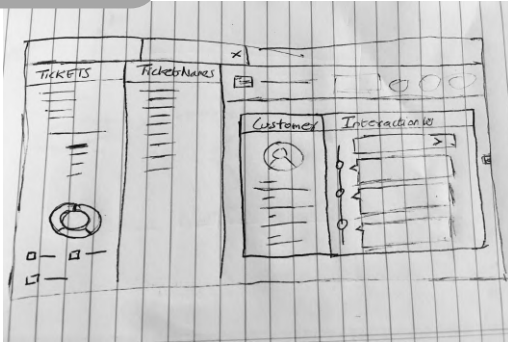


After

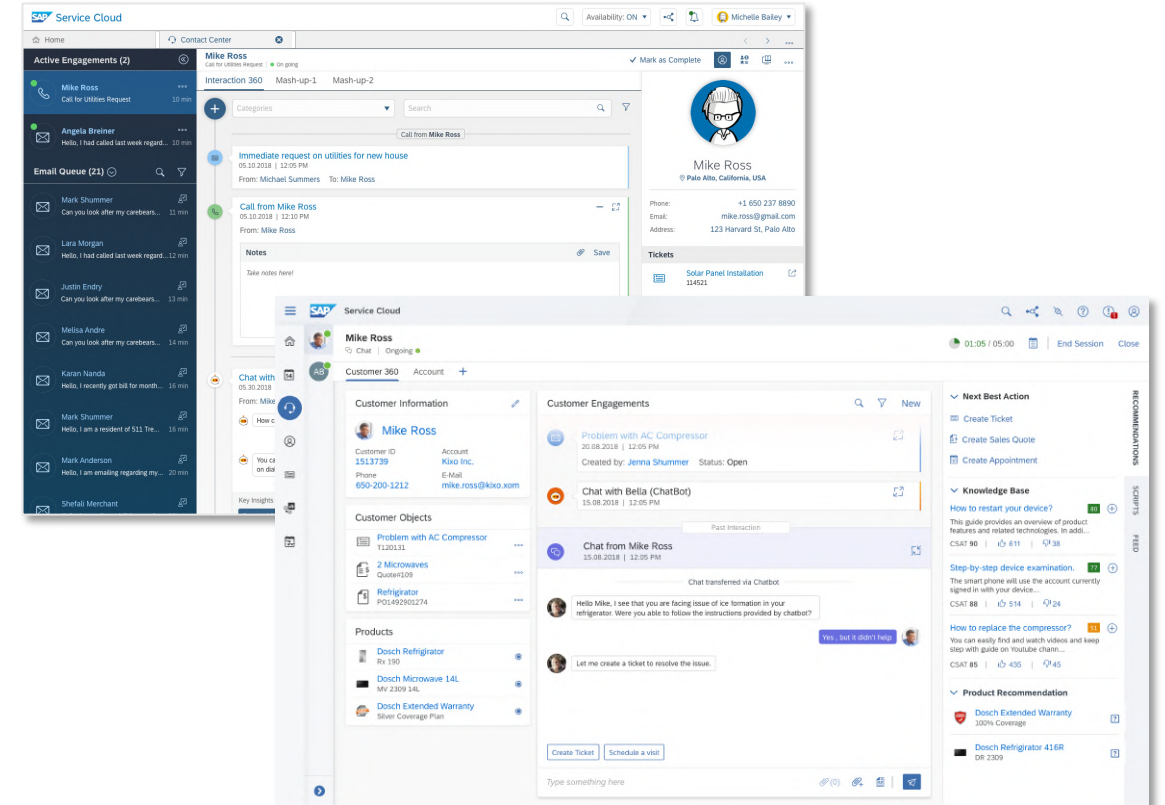


Wireframes and Initial Concept

Before



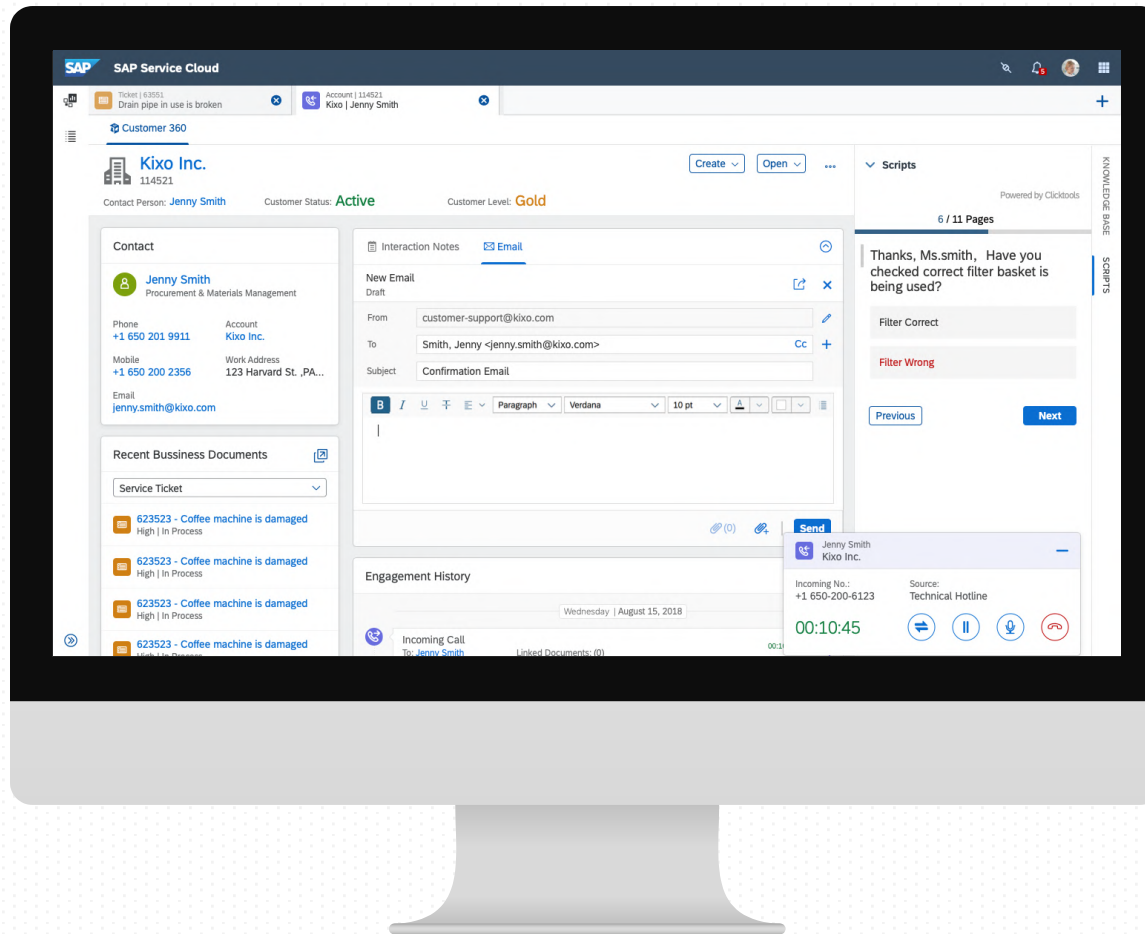
After





Designs

Screen: Customer Overview



Problem

Service Agent Michelle's most common frustration from existing product was to find right information about customer at right time.



Solution

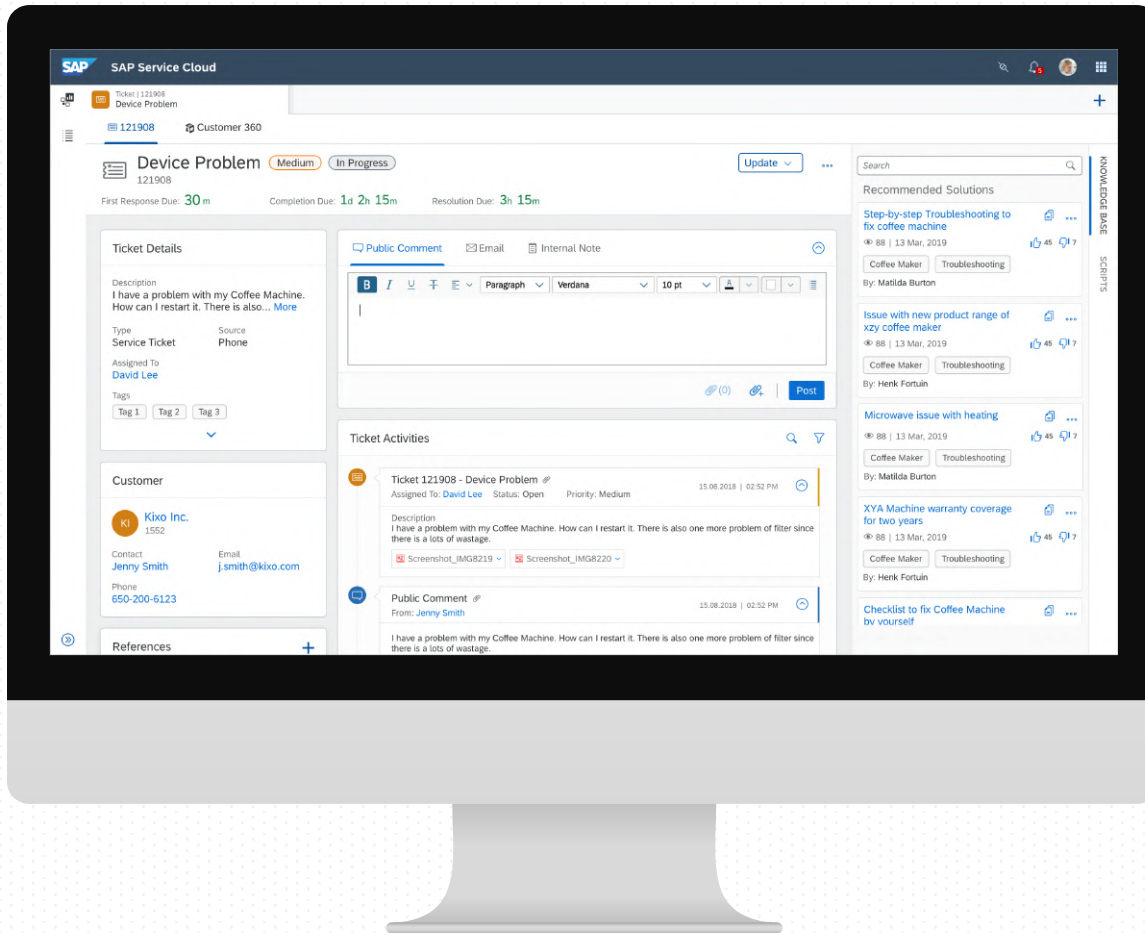
This screen provides the 360° view of a customer to Michelle. She can now get customer details, their history, documents, and knowledge articles.



Challenge

In a solution like this which should be able to cater different business process. An administrator should always be able to configure UI as per their need.

Screen: Business Documents



Problem

Michelle always had a problem to track the activities and information about any business documents like tickets, sales quotes, and sales order.



Solution

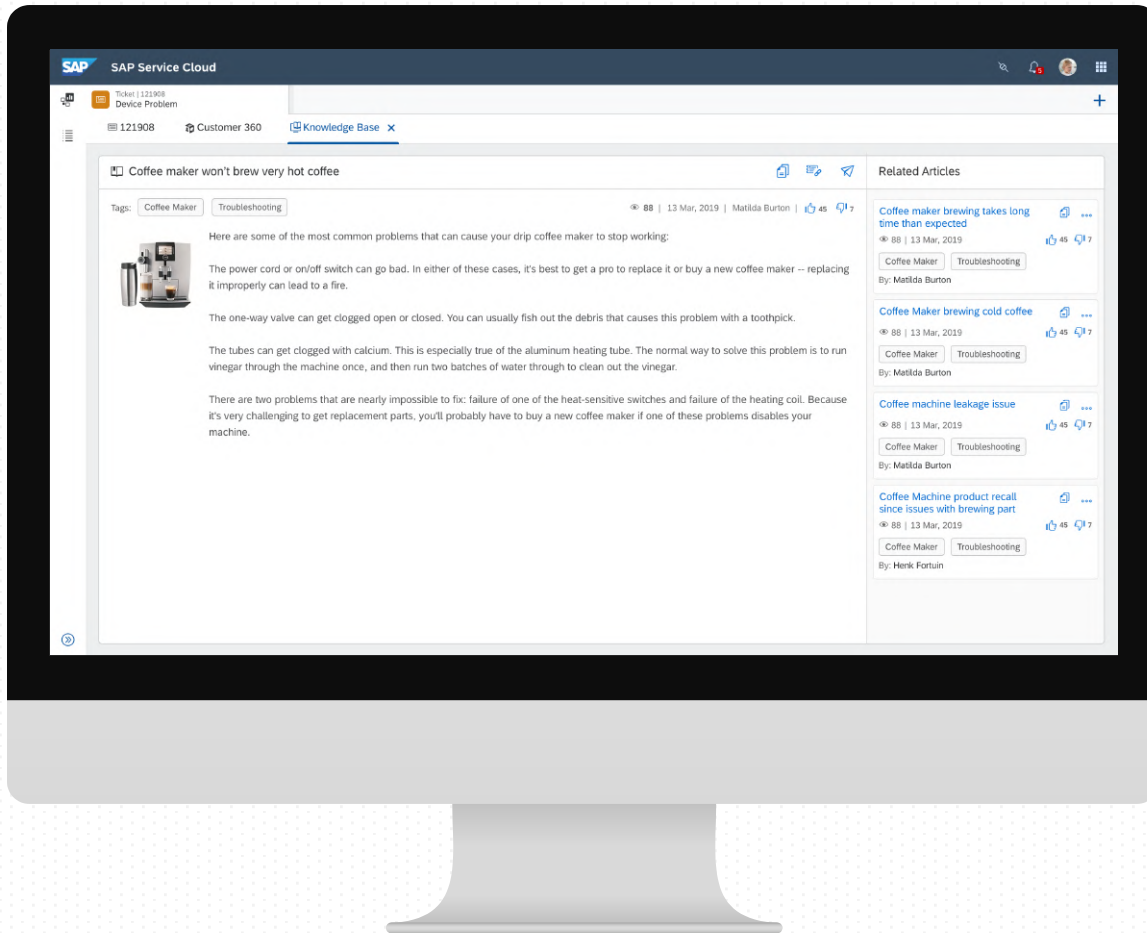
The new business document experience provides all the information including the progress and all the activities in a chronological order.



Challenge

Each document has different piece of information to deal with i.e. a service ticket can't be used for returns. Therefore UI should be configurable for all use cases.

Screen: Knowledge Base



Problem

Michelle always struggled to find correct solution during her engagement with end consumers. Looking for different source of information is always tedious.



Solution

The new solution makes sure that Michelle gets all the information she needs regardless of which page she is looking at.



Challenge

The future scope for this is to provide well integration in work process i.e. Machine learning should suggest the contextual information as per Michelle's needs.



Evolution of Product

Past

The screenshot shows the SAP Customer Data Hub interface for a customer named Sara Smith. The interface is characterized by a flat hierarchy of tabs at the top and a list of facets on the right. The main content area displays two tables: 'Account Team' and 'Addresses'.

Account Team (1)

Name	Party Role	Phone	E-Mail
Romit Ghose	Owner - Sales		romit.ghose@sap.com

Addresses (1)

Address	Phone	Mobile	Fax	E-Mail	Main	Bill-To
1233 El Camino Real / Palo Alto CA 94402 / US	+1 920-727-2848 ext 7370	+1 408-001-3423		sarasmithdemo@gmail.com	Yes	Yes (Automatic)

Flat hierarchy and therefore an user will end up with different types of tabs without any context.

The information was broken down into lots of facets, therefore a cumbersome and time taking process to navigate.

Plain visualization and tables make the application very monotonous and disenchanting.

Current

The screenshot displays the SAP Live Activity Center for 'Kixio Inc.'. The top navigation bar includes the SAP logo and various utility icons. Below the header, the account details for 'Kixio Inc.' (Account 001324) are shown, including contact information for Jenny Smith (Vice President of Sales) and account status (Gold, Active). The main content area is divided into three sections: 'Contacts' (6), 'Registered Products' (2), and 'Engagement History'. The 'Engagement History' section is the central focus, showing a timeline of activities from August 2018 to March 2018. The timeline includes events such as 'Request for a quote for 2 Microwaves', 'Customer complained about the problem with...', 'Incoming Call', 'Quote Request', and 'Product Inquiry'. The interface is designed to provide a comprehensive view of customer interactions and product information.

Live Activity Center
Kixio Inc.

Account 360 Ticket 209187 Sales Order #12901762190

Account | 001324
Kixio Inc.

Main Contact: **Jenny Smith**
Job Title: Vice President of Sales
Department: Sales and Marketing

Brand : -
Status: Active
Custom Field: -

Category
Gold

Status
Active

Overview

Contacts (6)

- Dana Stein**
43243242
dana.s@kixio.com • 6169129123
- Marc Jonson**
43243242
marc.j1@kixio.com • 6169129123
- Becky Asburg**
43243242
becky.a@kixio.com • 6169129123

Registered Products (2)

- easyScooter-ER-4711**
743247237432874
Purchased On: 10.10.2019
- easyScooter-ER-3192**
7434254354785641
Purchased On: 10.10.2019

Engagement History

- 121908 - Request for a quote for 2 Microwaves**
Assigned To: Jenna Shu...
12.08.2018 | 10:05 AM
- Customer complained about the problem with...**
From: Jenna Shummer
15.08.2018 | 10:05 AM
- Incoming Call**
From: Jenny Smith
10.04.2018 | 10:05 AM
- 11009 - Quote Request**
Assigned To: Jenna Shu...
10.04.2018 | 10:05 AM
- 10989 - Product Inquiry**
Assigned To: Jenna Shu...
01.03.2018 | 10:05 AM
- Incoming Call**
To: Jenny Smith
01.03.2018 | 10:05 AM

RECOMMENDATIONS
KNOWLEDGE BASE
SCRIPTS

Revisiting Information Architecture made the session handling possible which let users open information in context.

No more need of facets to browse the useful information. The customers can use this level for their customization.

Better visualization of information makes the information less wordy and interesting.



Watch Concept Demo!





Thank You

Further design details is only available for in-person reviews.