

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

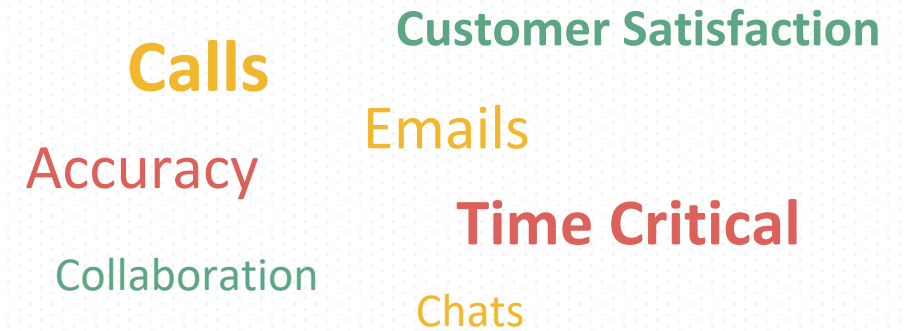
Age : 29

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.

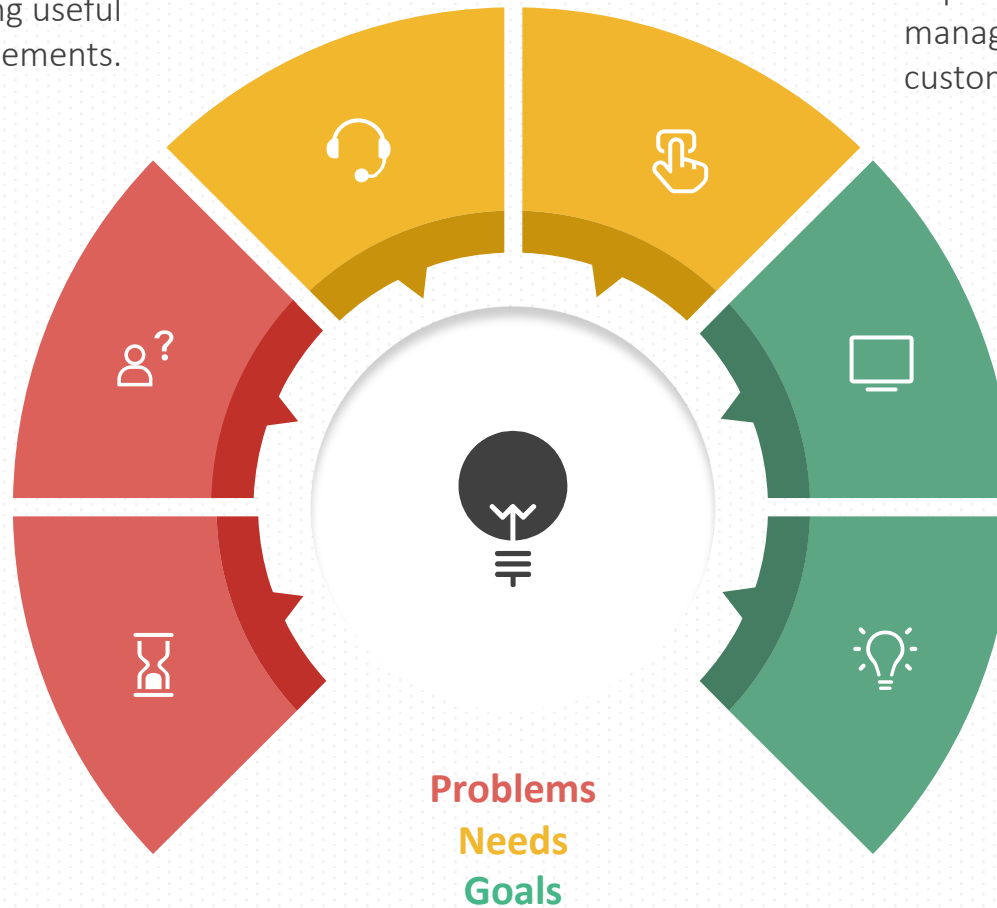
Improved experience in terms of ticket management and providing solutions to customer.

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


```

graph TD
    Before[Before] --> Login[Login]
    Login --> TurnAvail[Turn Avail.]
    TurnAvail --> LiveHighVolume[Live high volume]
    TurnAvail --> ExistingTickets[Existing Tickets / Emails]
    ExistingTickets --> NonLine[Non-line]
    ExistingTickets --> Queue[Queue]
    LiveHighVolume --> CallChat[Call Chat Video chat Co-browsing]
    LiveHighVolume --> DetermineCustomer[Determine Customer]
    DetermineCustomer --> ForUnknown[For Unknown]
    DetermineCustomer --> Multiple[Multiple]
    ForUnknown --> NameEmail[Name/email/phone/address]
    ForUnknown --> AnyOtherVerification[Any other verification?]
    Multiple --> Single[single]
    Multiple --> Multiple2[multiple]
    Single --> KnowCustomer[know customer]
    Single --> Product[product]
    Multiple2 --> InteractionHistory[Interaction history]
    KnowCustomer --> Solve[solve]
    KnowCustomer --> Reply[Reply]
    Product --> Solve
    Product --> Reply
    InteractionHistory --> Solve
    InteractionHistory --> Reply
    Solve --> NoInfo[no info: KB, similar ticket, web solution]
    Solve --> Collaboration[collaboration?]
    Reply --> WrapUpCall[wrap up call]
    WrapUpCall --> ResponseTime[response time? closed]
    WrapUpCall --> CSSurvey[CS Survey? auto or manual? for call, chat, email]
    CSSurvey --> AutoManual[auto or manual?]
    CSSurvey --> ForCallChatEmail[for call, chat, email]
  
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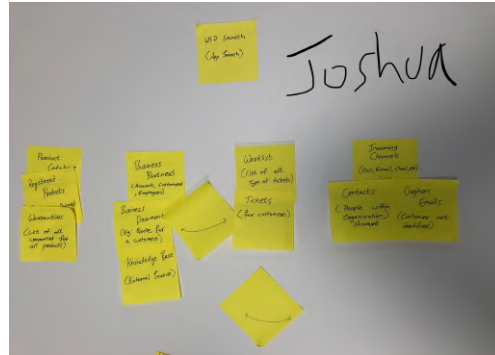
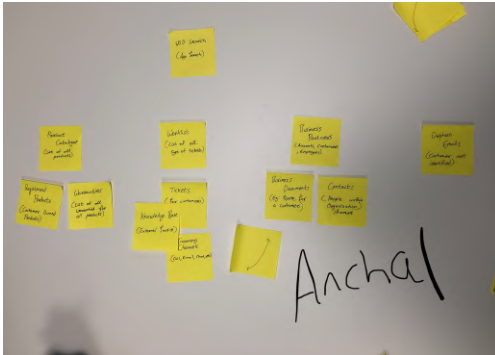
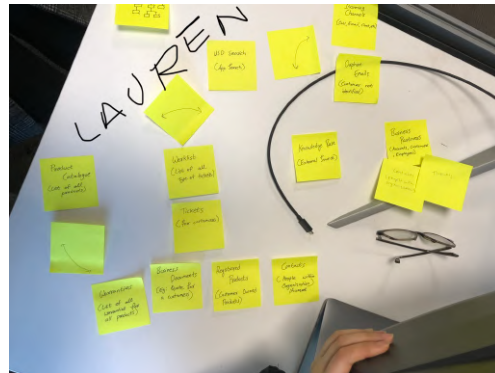
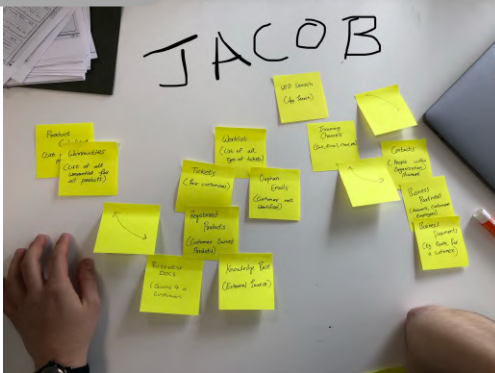
The flowchart illustrates a customer service process. It begins with a 'Before' state, leading to 'Login'. From 'Login', the process moves to 'Turn Avail.', which then branches into 'Live high volume' and 'Existing Tickets / Emails'. 'Existing Tickets / Emails' leads to 'Non-line' and 'Queue'. 'Live high volume' leads to 'Call Chat Video chat Co-browsing' and 'Determine Customer'. 'Determine Customer' branches into 'For Unknown' and 'Multiple'. 'For Unknown' leads to 'Name/email/phone/address' and 'Any other verification?'. 'Multiple' leads to 'single' and 'multiple'. 'single' leads to 'know customer' and 'product'. 'multiple' leads to 'Interaction history'. 'know customer' leads to 'solve' and 'Reply'. 'product' leads to 'solve' and 'Reply'. 'Interaction history' leads to 'solve' and 'Reply'. 'solve' leads to 'no info: KB, similar ticket, web solution' and 'collaboration?'. 'Reply' leads to 'wrap up call' and 'response time? closed'. 'wrap up call' leads to 'CS Survey? auto or manual? for call, chat, email'. 'CS Survey?' leads to 'auto or manual?' and 'for call, chat, email'.

After

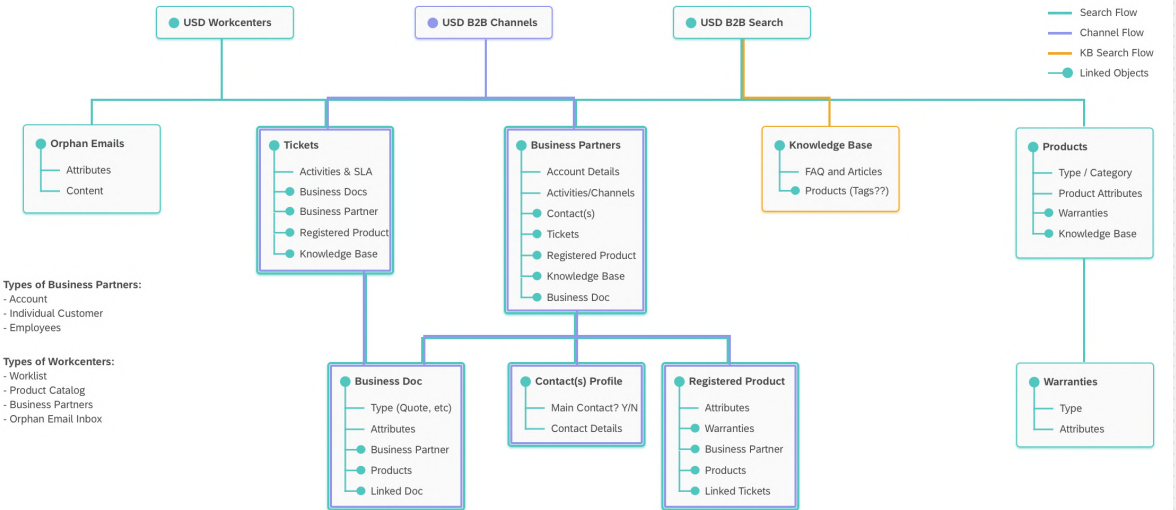
```
graph TD
    Login((Login)) --> Homepage[Homepage]
    Homepage -- "Tickets / Email created tickets" --> OfflineChannels((Offline Channels))
    Homepage --> TurnOnAvailability[Turn On Availability]
    TurnOnAvailability --> LiveActivity[Live Activity]
    LiveActivity --> DetermineCustomer[Determine Customer]
    DetermineCustomer --> Multiple{Multiple}
    DetermineCustomer --> SingleIdentified[Single Identified]
    DetermineCustomer --> Unknown{Unknown}
    Multiple --> Unknown
    Unknown --> VerifyCustomer[Verify Customer]
    VerifyCustomer --> ConfirmCustomer[Confirm Customer]
    ConfirmCustomer --> UnderstandIssue[Understand Issue]
    UnderstandIssue --> New{New}
    UnderstandIssue --> Existing{Existing}
    New --> CreateTicket[Create Ticket]
    New --> CreateOrder[Create Order]
    New --> Appointments[Appointments]
    Existing --> QueryQuestions[Query / Questions]
    QueryQuestions --> WrapUpCall[Wrap Up Call]
    WrapUpCall --> Survey((Survey))
    SingleIdentified --> KnowingCustomer[Knowing Customer]
    KnowingCustomer --> SolveTicket[Solve Ticket]
    SolveTicket --> CloseTicket((Close Ticket))
    OfflineChannels --> CheckTicketQueue[Check Ticket Queue]
    CheckTicketQueue --> PriorityTickets[Priority Tickets]
    PriorityTickets --> KnowingCustomer
```


Information Architecture

Before

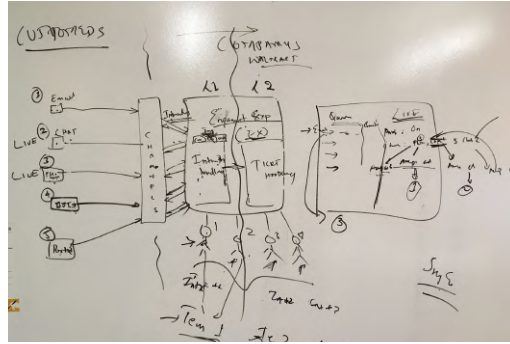
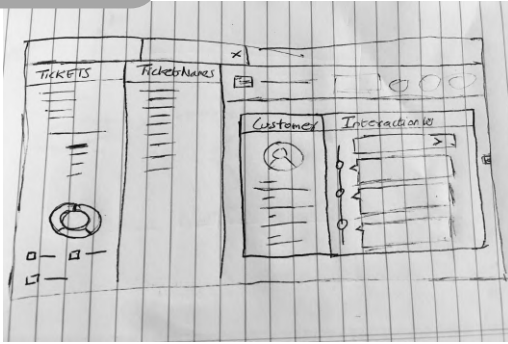


After

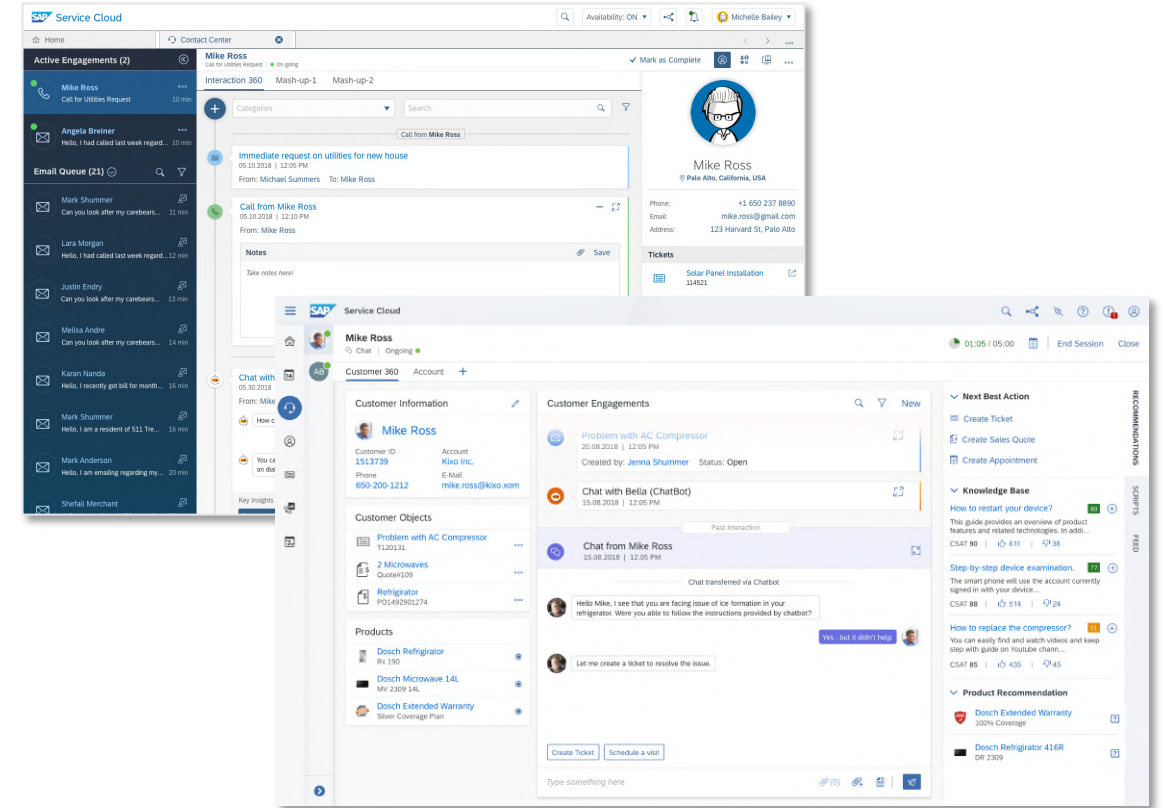


Wireframes and Initial Concept

Before



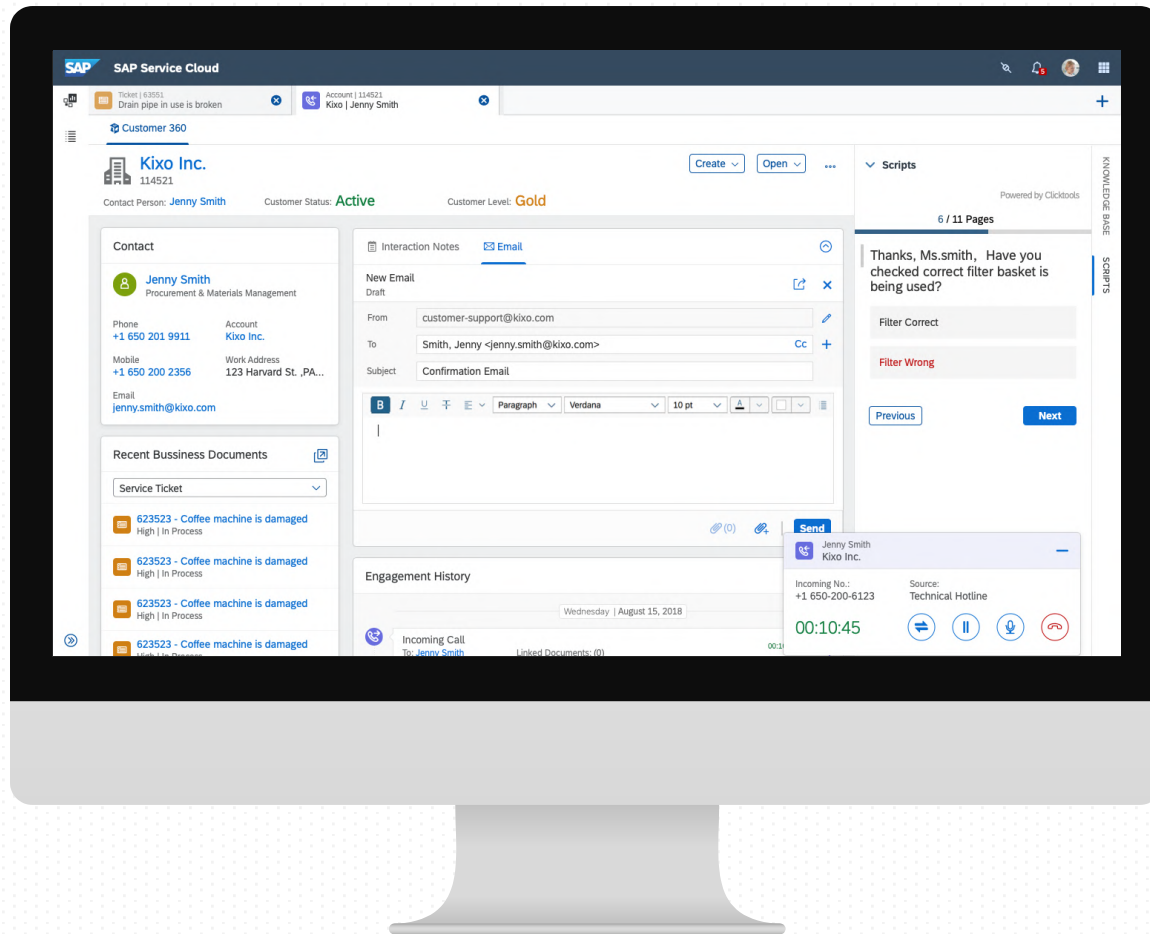
After





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

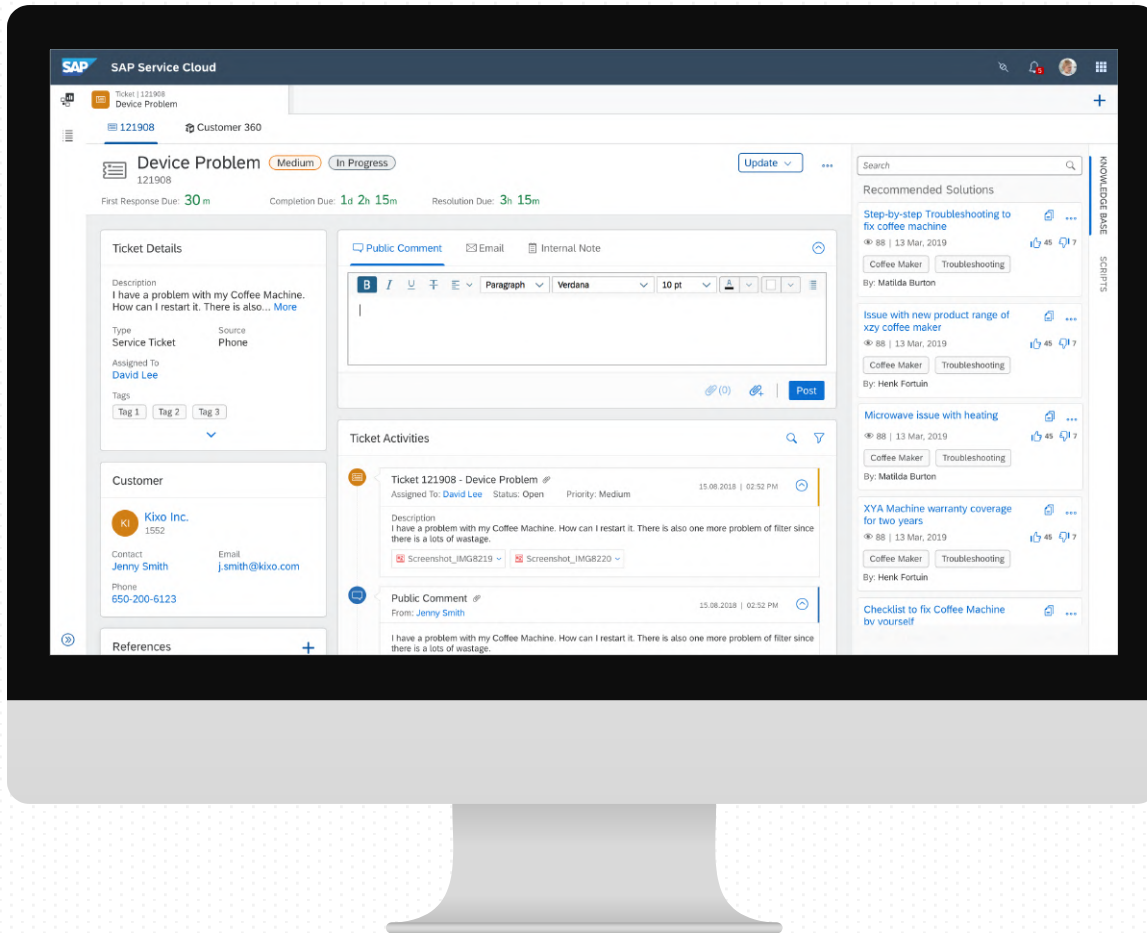
This screen provides the 360° view of a customer to Michelle. She can now get customer details, their history, documents, and knowledge articles.



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

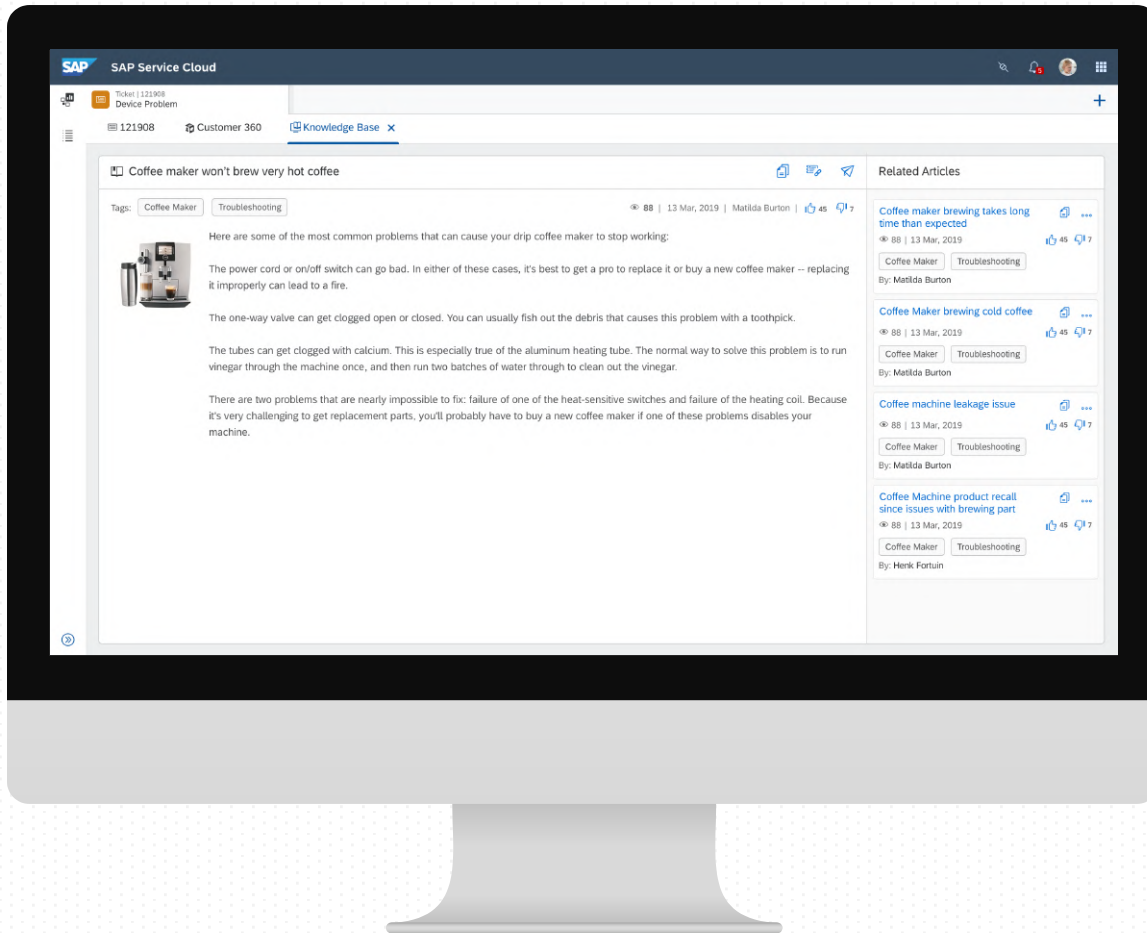
The new business document experience provides all the information including the progress and all the activities in a chronological order.



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 S/4HANA Customer Data Hub interface for a customer named Kixio Inc. The top navigation bar includes the SAP logo, search, and user profile icons. Below the navigation bar, the customer's account information is shown, including Account 360, Ticket 209187, and Sales Order #12901762190. The customer's profile details are listed: Main Contact: Jenny Smith, Job Title: Vice President of Sales, Department: Sales and Marketing, Brand: -, Status: Active, Category: Gold, and Status: Active. The interface is divided into three main sections: Overview, Contacts, and Registered Products. The Overview section shows a timeline of customer interactions, including a Request for a quote for 2 Microwaves (12.08.2018), a Customer complaint about the problem with... (15.08.2018), an Incoming Call (10.04.2018), a Quote Request (10.04.2018), a Product Inquiry (01.03.2018), and another Incoming Call (01.03.2018). The Contacts section lists three contacts: Dana Stein, Marc Jonson, and Becky Asburg. The Registered Products section lists two products: easyScooter-ER-4711 and easyScooter-ER-3192. The right sidebar contains links to Recommendations, Knowledge Base, and 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.