

Customer Experience Management

SAP Service Cloud



Overview

The SAP has an existing Cloud Platform for its CRM solution. The product has always faced criticism for its user experience issues and lack of Omnichannel capabilities which is crucial for call centers.

I was assigned to work on a new concept and got support to conduct some research and get some insights from the Product Managers and our Innovation Partners. One year has been passed and my rest of the team joined to realize this product called as Customer Experience Management.

This document focuses on the process of realizing this concept design to an actual product for SAP Service Cloud.

Process



1



Research

2



Ideate

3



Design

4



Test

5



Iterate

Research Findings

Based on feedback on old product



Breakdown

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

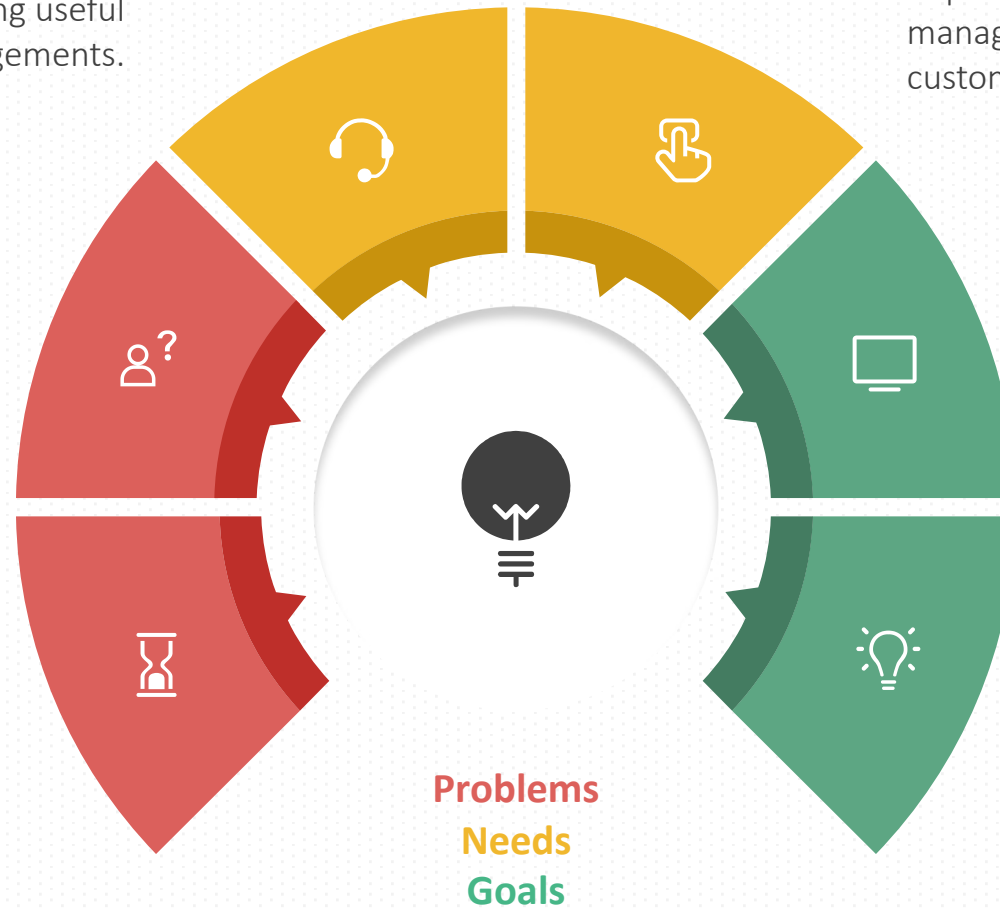
Improved experience in terms of ticket management and providing solutions to customer.

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.





Michelle Bailey

Customer Service Agent

About

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



Ambition



Data Driven



Visually Driven





Initial Process

Before

```
graph TD
    Login[Login & Turn Avail.] --> Live[Live high volume]
    Login --> Existing[Existing Tickets / Emails]
    Existing --> NonLine[Non-line]
    Existing --> LiveChat[Live chat video chat co-browsing]
    Live --> Determine[Determine Customer]
    Determine --> Single[single]
    Determine --> Multiple[multiple]
    Single --> KnowCustomer[know customer product interaction history]
    Multiple --> KnowCustomer
    KnowCustomer --> Solve[solve]
    Solve --> Reply[Reply]
    Solve --> Moments[moments: KB, similar ticket, user collaboration?]
    Determine --> Unknown[For Unknown]
    Unknown --> Name[Name / email / phone / address]
    Name --> Verification[Any other verification?]
    Verification --> Confirm[confirm & update customer info]
    Confirm --> Understand[understand issue]
    Understand --> ExistingIssue[existing]
    Understand --> NewIssue[new]
    ExistingIssue --> Other[other]
    ExistingIssue --> Other2[other]
    Other --> CreateTicket[create ticket]
    CreateTicket --> WrapUp[wrap up call]
    NewIssue --> Query[Query / Questions: take notes & add to call]
    Query --> Channels[Channels: Email, Co-browsing, Chat]
    Channels --> WrapUp
    WrapUp --> CSurvey[CS Survey?]
    CSurvey --> AutoManual[auto or manual?]
    CSurvey --> ForCall[for call, chat, email]
```

Any other before doing work?

- Unresolved ticket?
- KPI?
- Follow-up for previous tickets?

Live high volume

Existing Tickets / Emails

Non-line

Live chat video chat co-browsing

Determine Customer

single

multiple

For Unknown

① Name / email / phone / address

② Any other verification?

confirm & update customer info

understand issue

existing

other

other

create ticket

Query / Questions: take notes & add to call

Channels: Email, Co-browsing, Chat

wrap up call

CS Survey?

auto or manual?

for call, chat, email

Customer Interaction Log?

Same issue, new ticket or repeat buying?

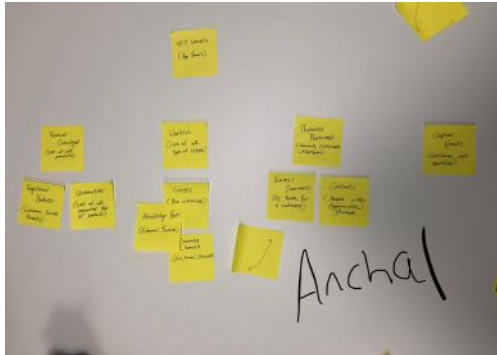
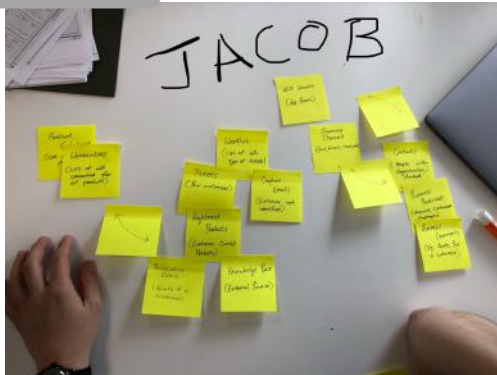
ATTENTION SERVICE CENTER

After

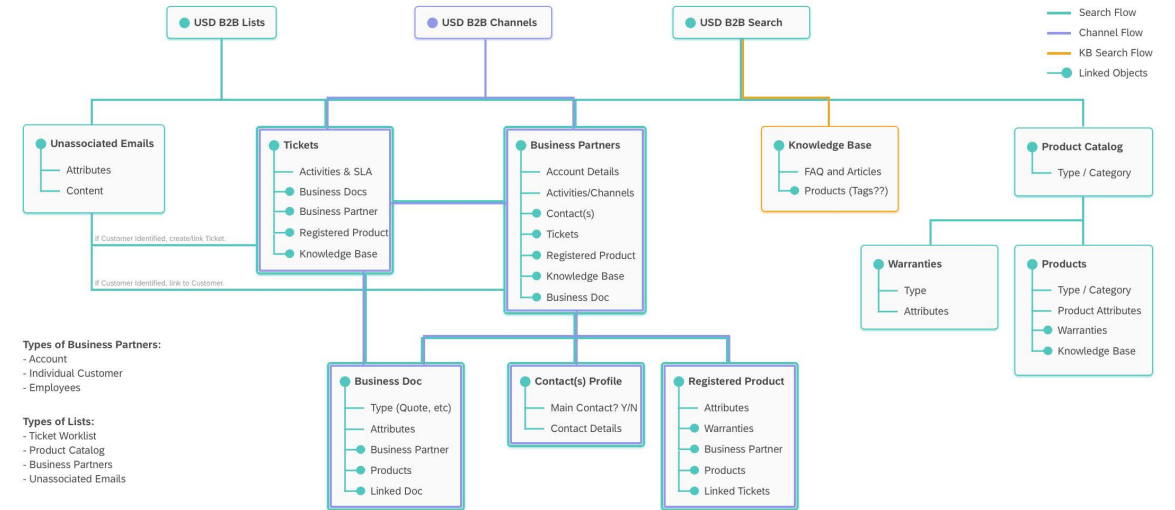
```
graph TD
    subgraph After
        Login((Login)) --> Homepage[Homepage]
        Homepage --> TurnOnAvailability[Turn On Availability]
        TurnOnAvailability --> LiveActivity[Live Activity<br/>• Call<br/>• Chat<br/>• Video Call]
        LiveActivity --> DetermineCustomer[Determine Customer]
        DetermineCustomer --> Multiple{Multiple}
        DetermineCustomer --> SingleIdentified[Single Identified]
        Multiple --> Unknown[Unknown]
        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))
        UnderstandIssue --> ExistingNew{Existing / New}
        ExistingNew -- Existing --> KnowingCustomer[Knowing Customer]
        ExistingNew -- New --> CreateTicket[Create Ticket<br/>• Create Order<br/>• Appointments]
        CreateTicket --> QueryQuestions[Query / Questions<br/>(Take notes & add to call)]
        QueryQuestions --> SingleIdentified
    end
    subgraph OfflineChannels[Offline Channels]
        CheckTicketQueue[Check Ticket Queue] --> PriorityTickets[Priority Tickets]
        PriorityTickets --> KnowingCustomer
        KnowingCustomer --> SolveTicket[Solve Ticket<br/>• Reply<br/>• KB, Similar Tickets, Used Solution, etc<br/>• Collaboration]
        SolveTicket --> CloseTicket((Close Ticket))
    end
    Homepage -- "Tickets / Email created tickets" --> CheckTicketQueue
```


Information Architecture

Before

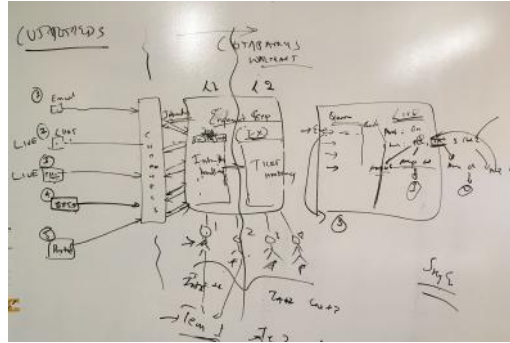
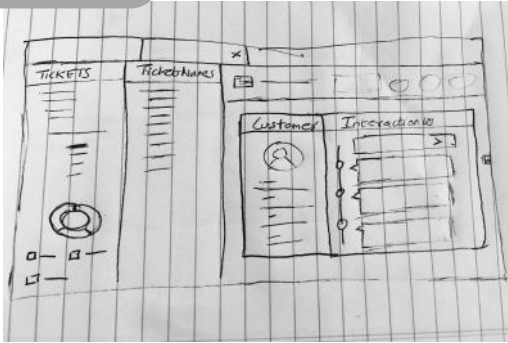


After

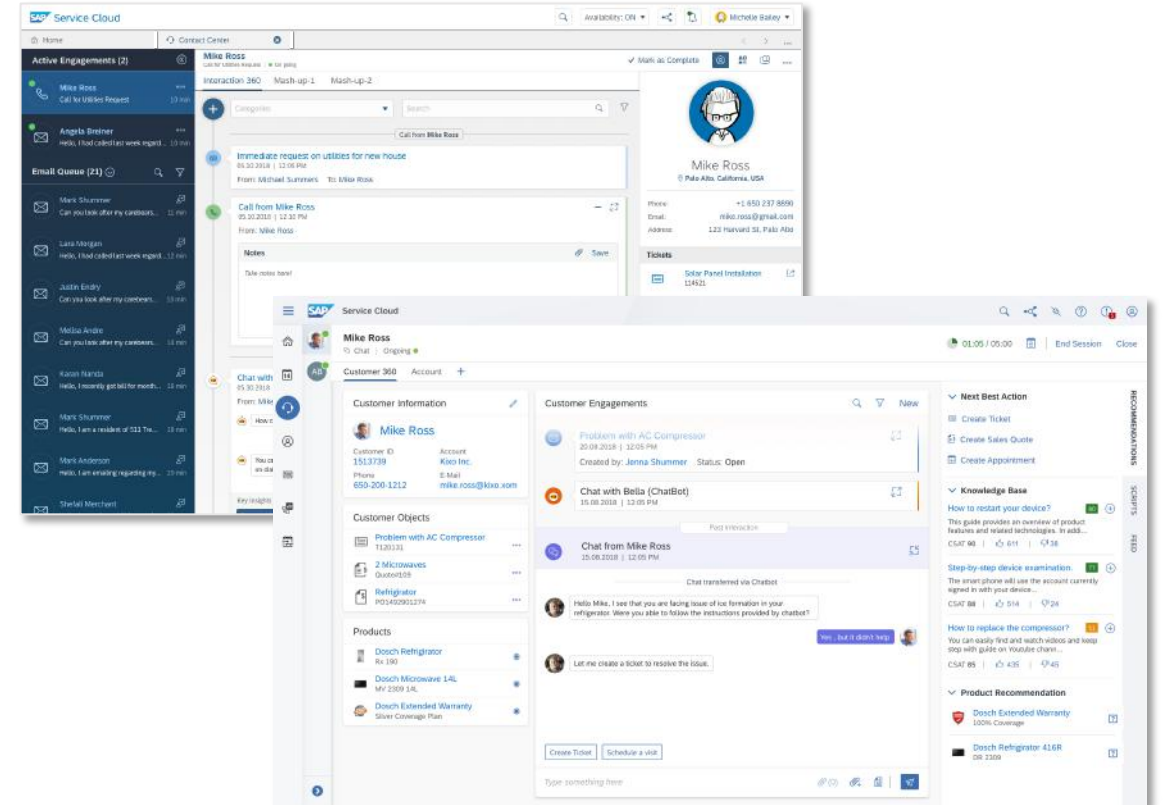


Wireframes and Initial Concept

Before



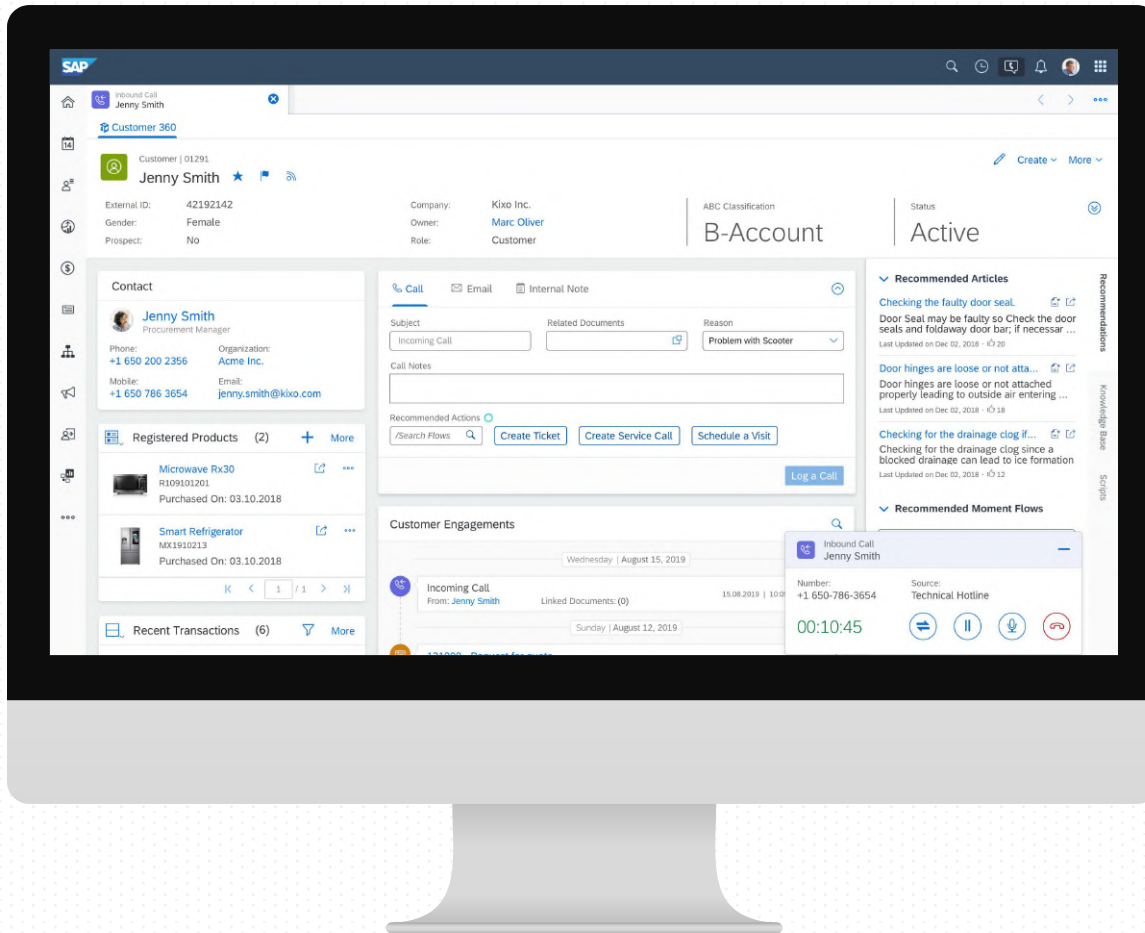
After





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

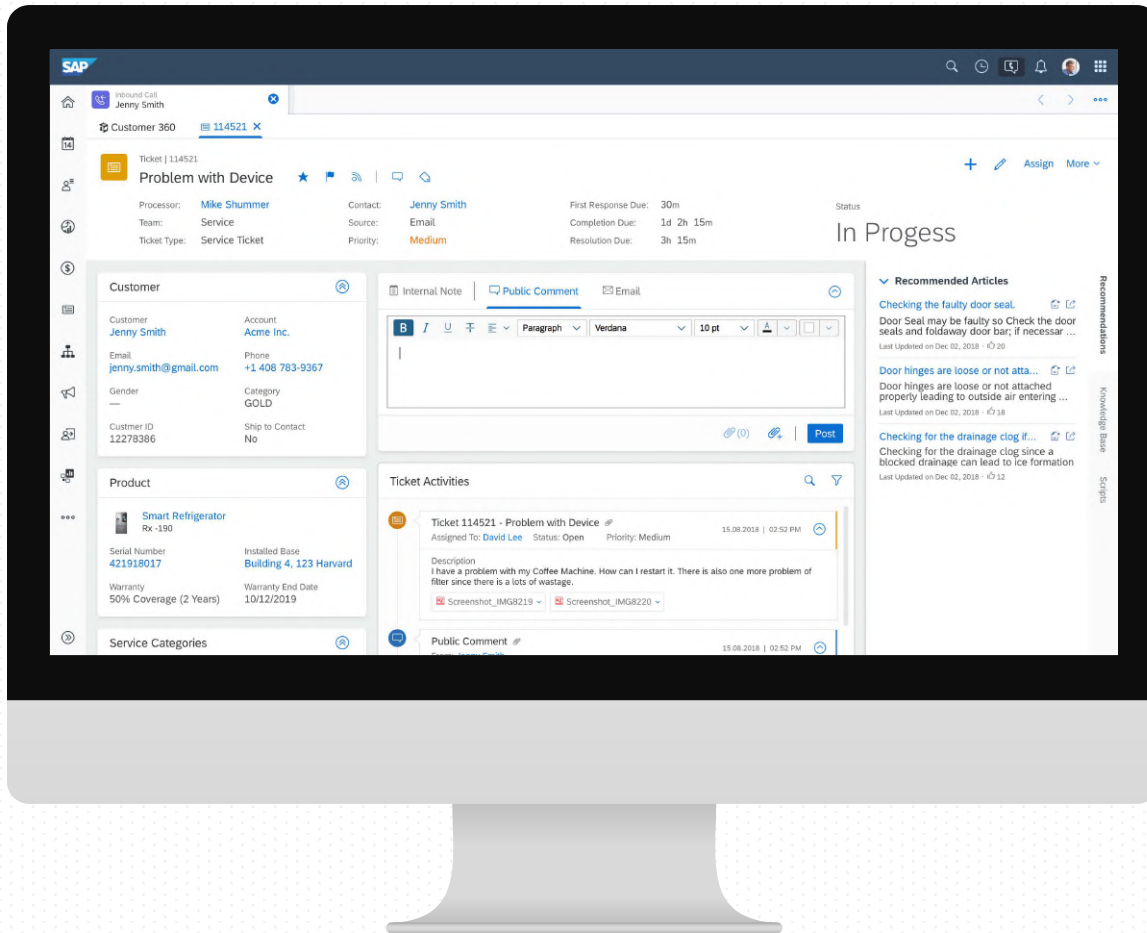
This screen provides the 360° view of a customer to Michelle. She can now get customer details, their history, documents, and knowledge articles.



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

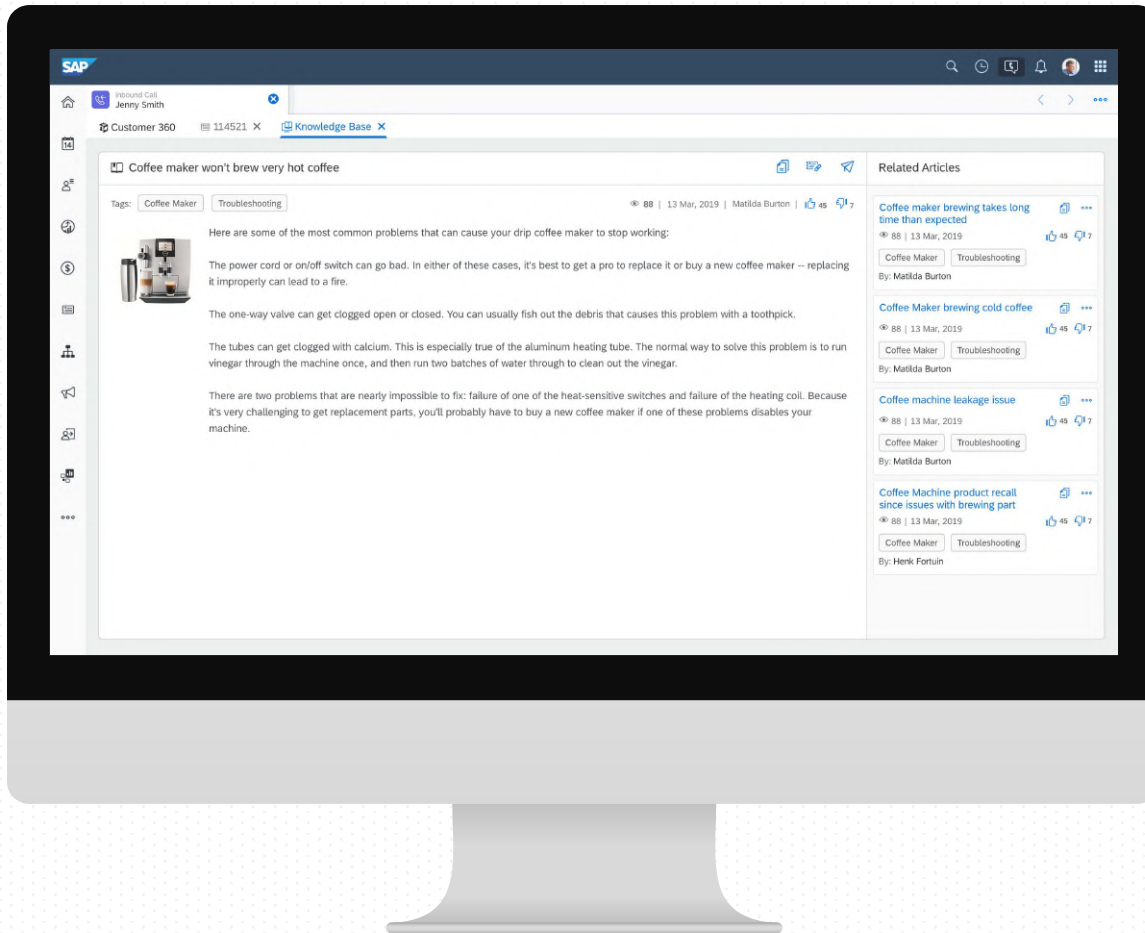
The new business document experience provides all the information including the progress and all the activities in a chronological order.



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 Jenny Smith. The interface is organized into several sections:

- Header:** SAP logo, navigation icons, and a search bar.
- Customer Overview:** Displays key information about Jenny Smith, including her role as Procurement Manager at Kixio Inc., contact details (phone, mobile, email), and company information (Kixio Inc., Owner: Marc Oliver, Role: Customer).
- Engagement History:** A timeline of interactions with the customer, including a request for a quote for 2 Microwaves (12.08.2018), a customer complaint (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).
- Registered Products:** A list of products associated with the customer, including a Microwave Rx30 (R109101201) and a Smart Refrigerator (MX1910213), both purchased on 03.10.2018.
- Recent Transactions:** A list of recent transactions, including a request for a quote for 2 Microwaves (Ticket ID: 121908).

The interface uses a clean, modern design with clear navigation and a focus on providing a comprehensive view of the customer's data and interactions.

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.