

Customer Engagement Center



Overview

The SAP CRM has an old product named Cloud for Customer. The customers always complained about the user experience issues and lack of Omnichannel capabilities which is crucial for call centers. This created a need within the Service Cloud organization to start a new concept.

I was assigned to work on this 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 Engagement Center.

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.

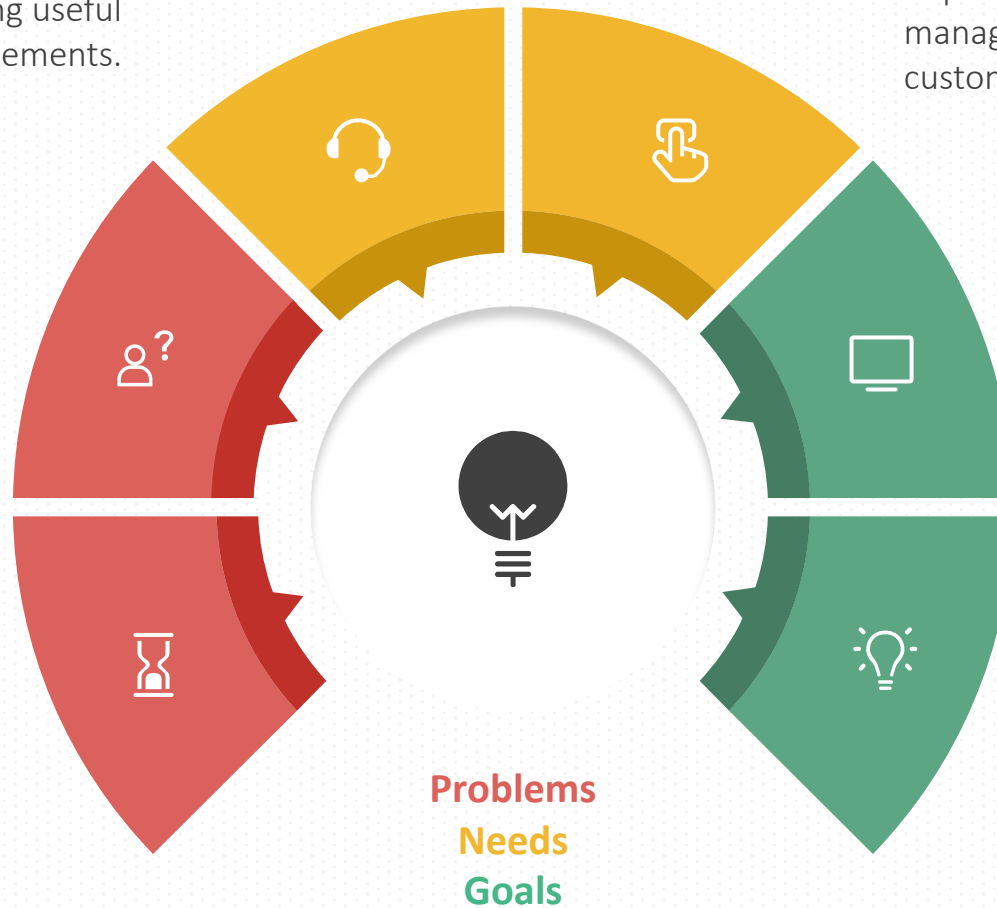
Improved experience in terms of ticket management and providing solutions to customer.

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

Social Media
Email
Chat
Accuracy
Speed
Collaboration
Customer Satisfaction

Tech Savvy



Ambition



Data Driven



Visually Driven





Initial Process

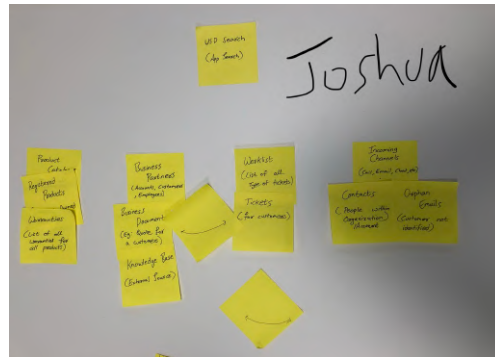
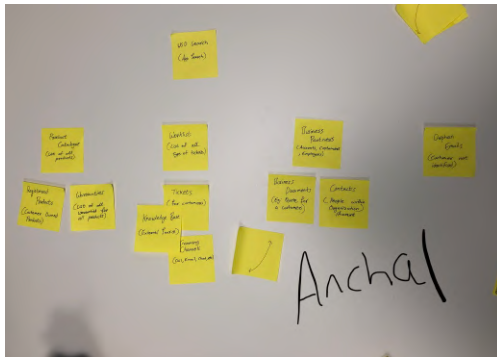
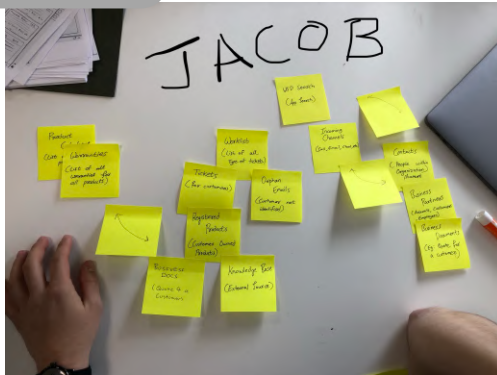
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After

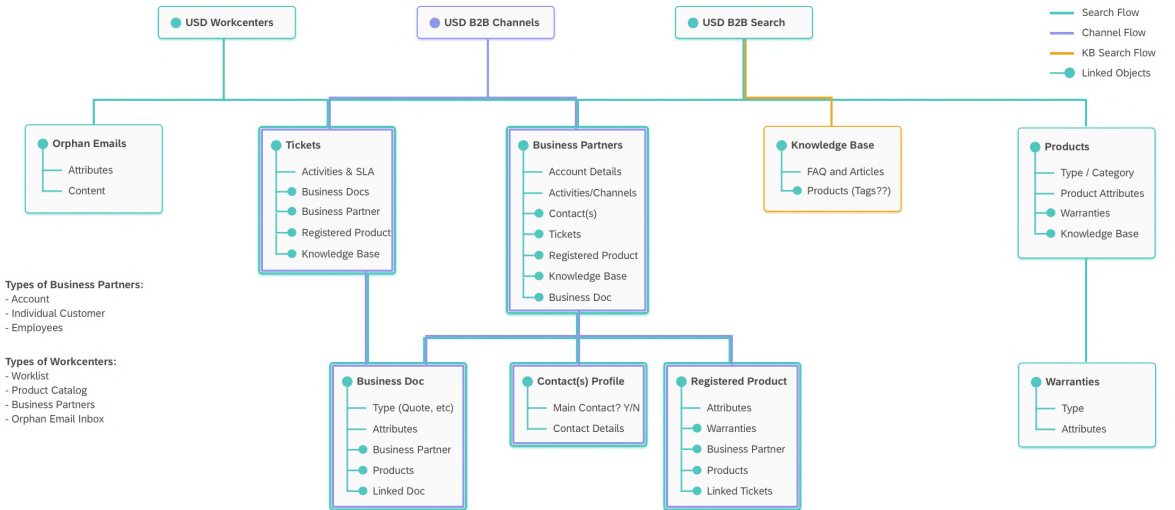
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graph TD
    Login((Login)) --> Homepage[Homepage]
    Homepage -- "Tickets / Email created tickets" --> OfflineChannels((Offline Channels))
    Homepage --> TurnOnAvailability[Turn On Availability]
    TurnOnAvailability --> LiveActivity[Live Activity<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 --> New[New<br/>• Create Ticket<br/>• Create Order<br/>• Appointments]
    Existing --> Query[Query / Questions<br/>(Take notes & add to call)]
    Existing --> SolveTicket[Solve Ticket<br/>• Reply<br/>• KB, Similar Tickets, Used Solution, etc<br/>• Collaboration]
    Multiple --> VerifyCustomer[Verify Customer<br/>• Name, Email, Address, Phone<br/>• Other verification details]
    Unknown --> VerifyCustomer
    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
    SolveTicket --> CloseTicket((Close Ticket))
```


Information Architecture

Before

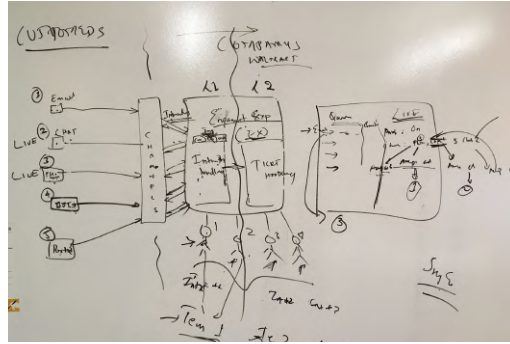
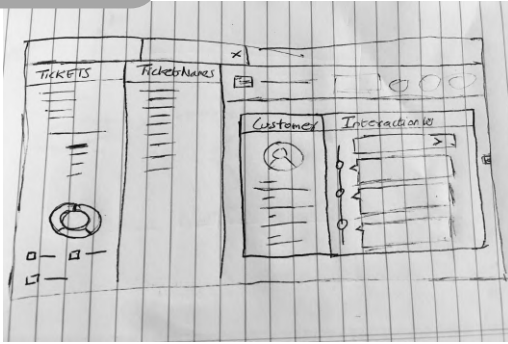


After

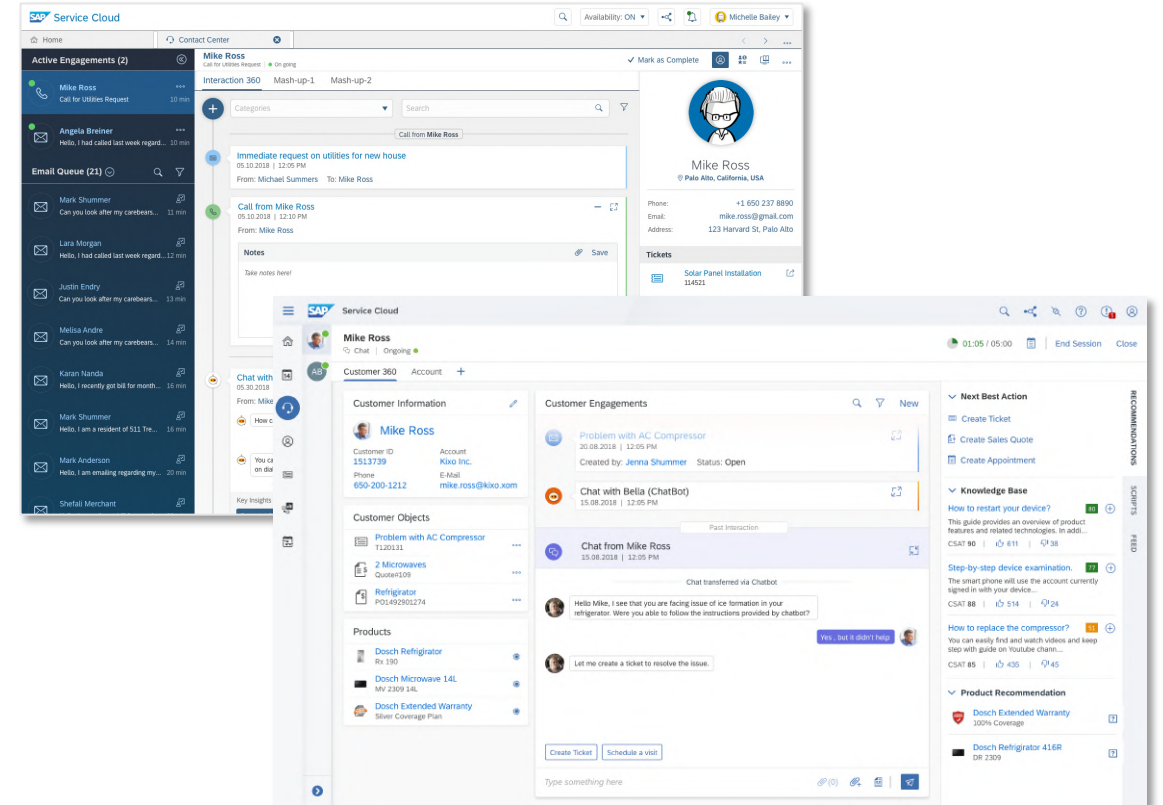


Wireframes and Initial Concept

Before



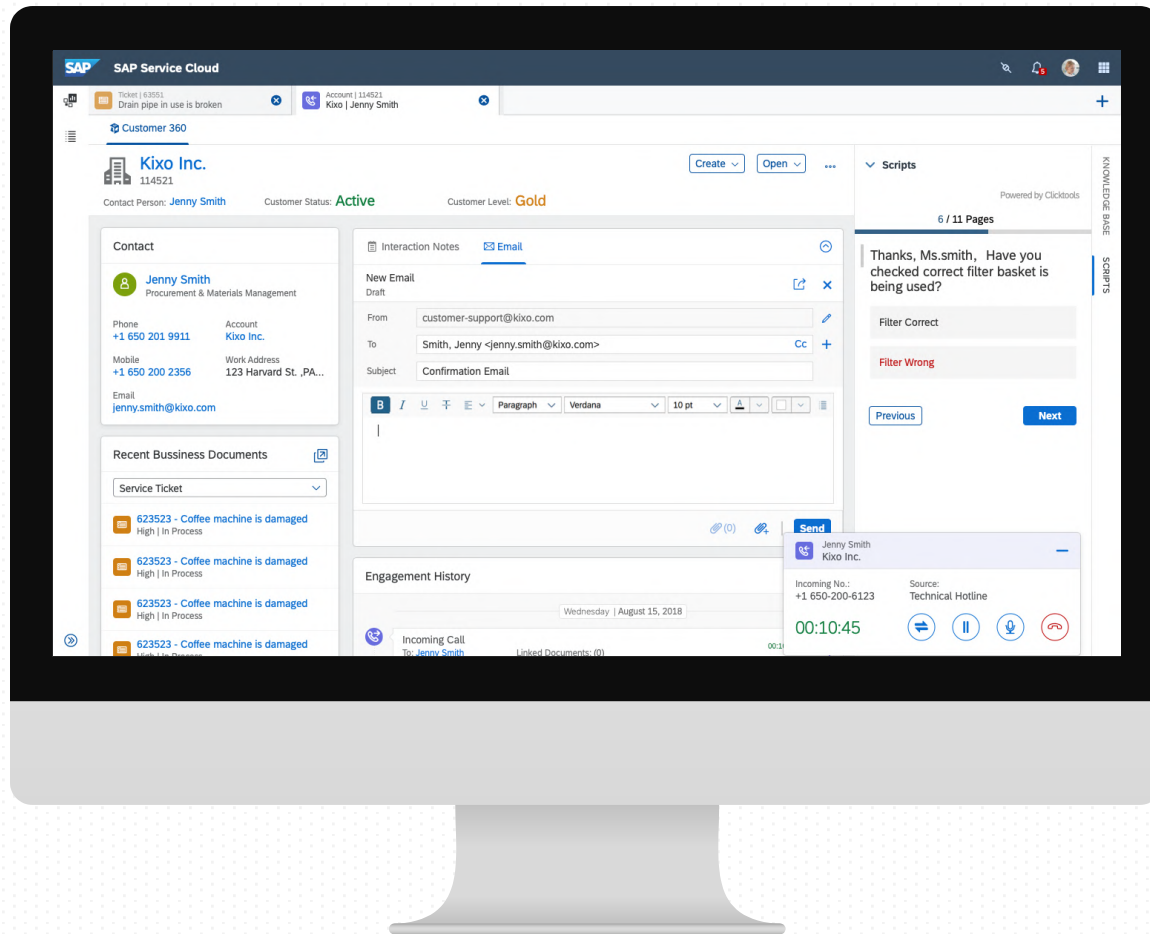
After





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

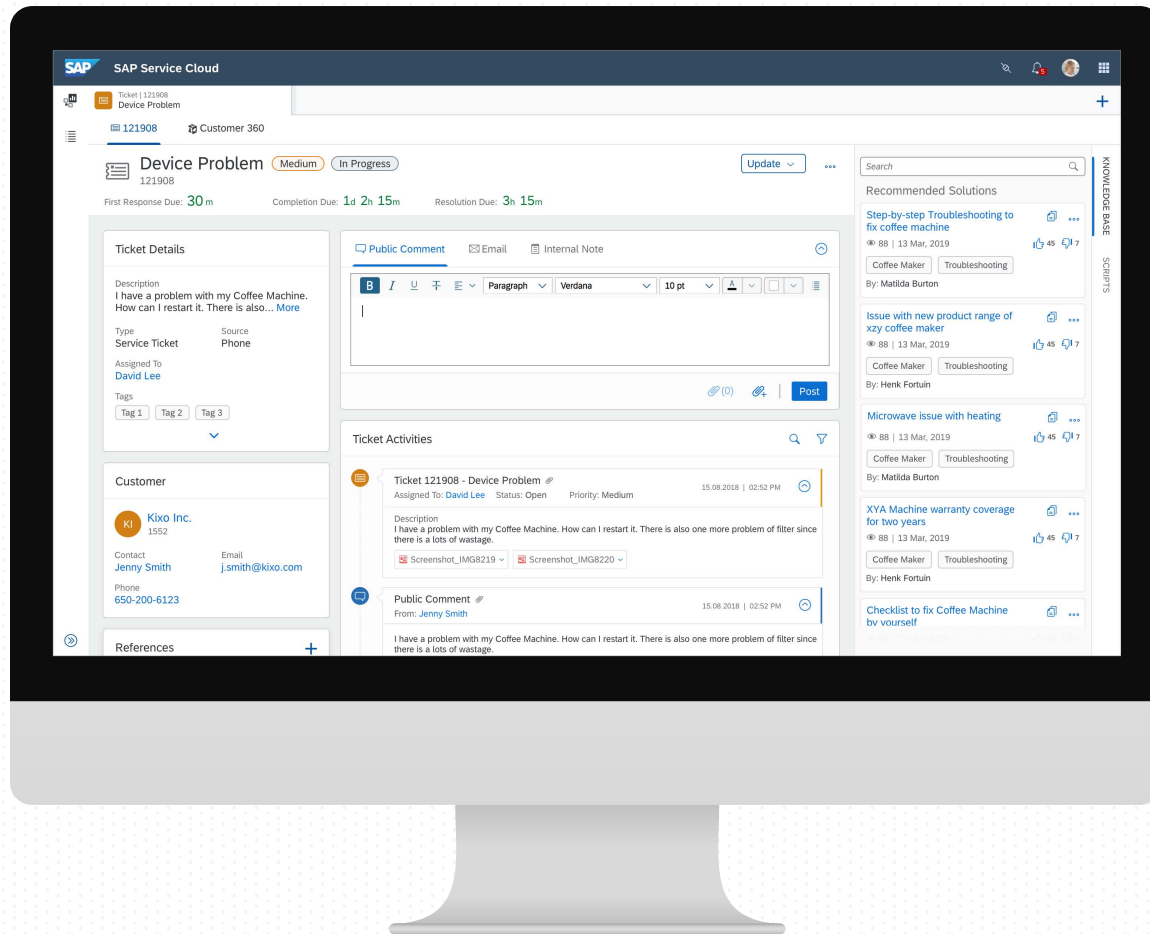
This screen provides the 360° view of a customer to Michelle. She can now get customer details, their history, documents, and knowledge articles.



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

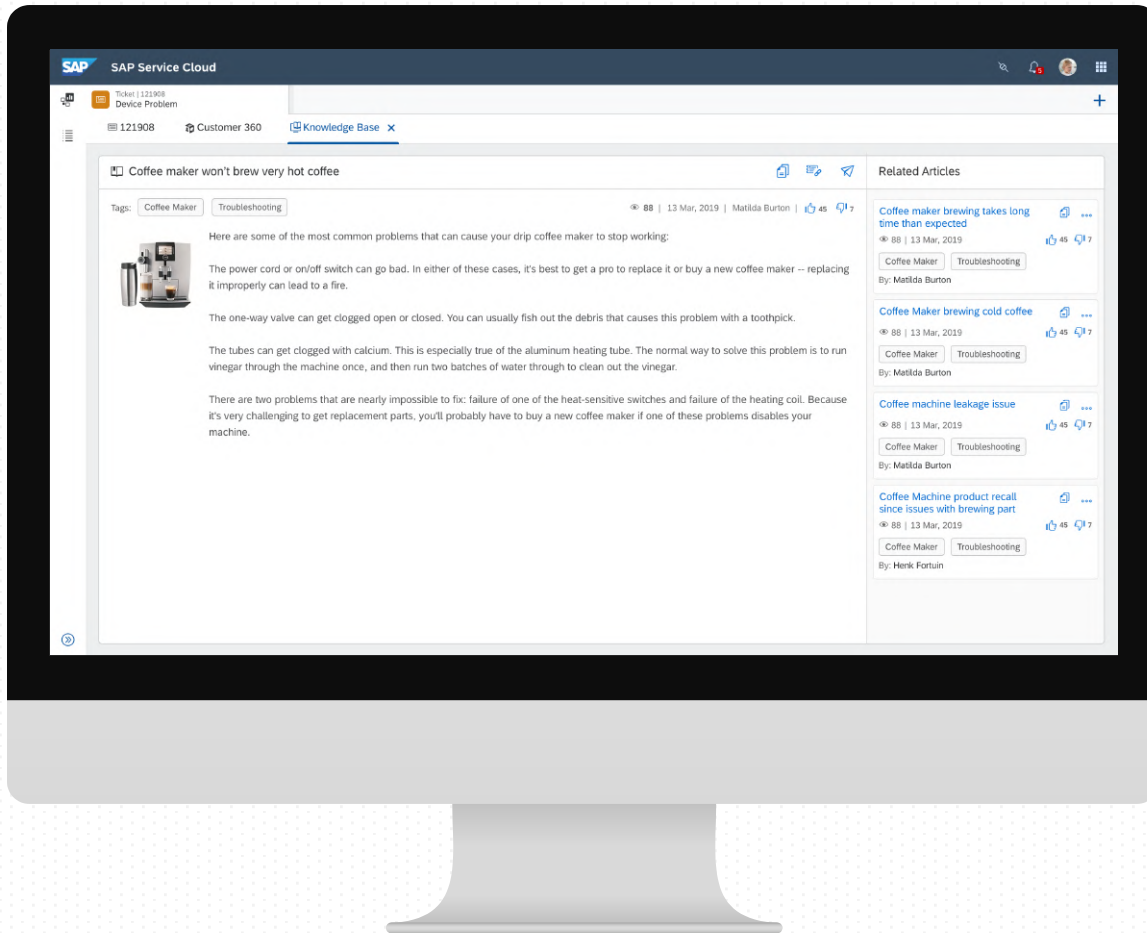
The new business document experience provides all the information including the progress and all the activities in a chronological order.



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.



Watch Demo!





Thank You

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