

IMPROVING TD EETS'S E2E BUSINESS USER EXPERIENCE

Situation Appraisal

TD EETS introduced its data-lake 3 years ago, an E2E solution to standardize how it warehouses data for various business intelligence and regulatory reporting functions.

TD EETS's strategic goals are:

- Self-service for business users to drive down costs
- On-demand data access to improve organizational agility
- Automation to improve data quality and for analysts to reclaim time for more value-added activities

Current project goals are:

- Improving service transparency for business users to build trust
- Make services more user-centred
- Improve efficiency and automation

Objectives

The objectives of the project include the following:

1. Prioritized backlog of client pain points and opportunities for improvement
2. Future vision for an improved service, to be shared with clients and key stakeholders
3. MVP designs for agile implementation cycles

Measures of Success

Our measures of success include:

- Decrease in the number of tickets related to job statuses
- Improved perceived service experience (NPS)
- Improved perceived service efficiency (Customer Effort Score)

Methodology

1. PRIORITIZED BACKLOG OF PAIN POINTS AND OPPORTUNITIES

1. Production Support interviews

- 5 x 1h one-on-one interviews
- OUTPUT: service touchpoints with prioritized pain points and opportunities

2. Client contextual inquiry

- 2-3 x 3h
- Shadowing a client while she is doing her work, which includes interacting with out systems
- Interview conducted during the shadowing
- OUTPUT: mapping our services in the context of use, mapping pain points and opportunities that fit in our clients' mental model / tools of work / processes

3. Client workshops (OPTIONAL)

- 2-3 x 0.5d
- 5-8 representatives from client departments / teams
- 1-2 members from our team
- OUTPUT: service touchpoints with prioritized pain points and opportunities

4. Internal synthesis workshop

- 3h
- Internal with selected team members
- OUTPUT: customer journeys with touchpoints, prioritized backlog of pain points and opportunities, shared understanding of client needs

2. FUTURE VISION

1. Internal concepting workshop

- 0.5d
- Internal with selected team members
- Coming up with ideas to solve client pain points
- OUTPUT: high-level concept and visual representation of our future vision

2. Lo-fi prototype

- 3d
- Lo-fi designs
- Internal feedback rounds
- OUTPUT: lo-fi prototype of our future vision

3. Client feedback (OPTIONAL)

- 2-3 x 30m
- Testing future vision lo-fi prototypes with client team members

- OUTPUT: validated future vision, early feedback on concepts, lower risk of failure
4. **Presentation-ready visuals**
- 1w
 - OUTPUT: UI designs (Sketch), presentation-friendly format (not production ready)

3. MVP designs for agile implementation cycles

1. Sprint planning meeting
2. Production-level designs (Sketch/HTML) for selected pain points / JTBD / user stories
3. Testing prototypes with clients
4. Supporting implementation of designs done in previous sprints
5. Following up on releases with contextual inquiries / client interviews / metrics

Timing

From pain point exploration to future vision the project is **1 to 2 months long**, depending on the optional components.

The **implementation could take several more months**, depending on the scope and development process.

1. **Prioritized backlog of pain points and opportunities — 9-19d**
 - Production Support interviews — 3d
 - Client contextual inquiry — 5d
 - *Client workshop (OPTIONAL) — 10d*
 - Internal synthesis workshop — 1d
2. **Future vision — 11-14d**
 - Internal concepting workshop — 1d
 - Lo-fi prototype — 3d
 - *Client feedback (OPTIONAL) — 3d*
 - Presentation-ready visuals — 7d
3. **Agile implementation — TBD**
 - depends on development process

Accountabilities

My accountabilities include:

- Planning, organizing and conducting interviews and contextual inquiries
- Planning, organizing and facilitating client and internal workshops
- Designing functional prototypes and hi-fi UI designs for presentation and production (Sketch / non-production ready HTML)
- Supporting implementation
- Following up on shipped features' client experience related metrics

Your accountabilities include:

- Supporting interview organization
- Supporting workshop organization
- Team representatives taking part in workshops

We jointly agree:

- To immediately inform the other if any situations develop that could affect the outcome and success of the project.

Terms and conditions

Full-time employee status or 1 year full-time contract with a salary in the range of C\$79k - C\$110k.

I am eligible to work in Canada (PR visa).

Contact

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