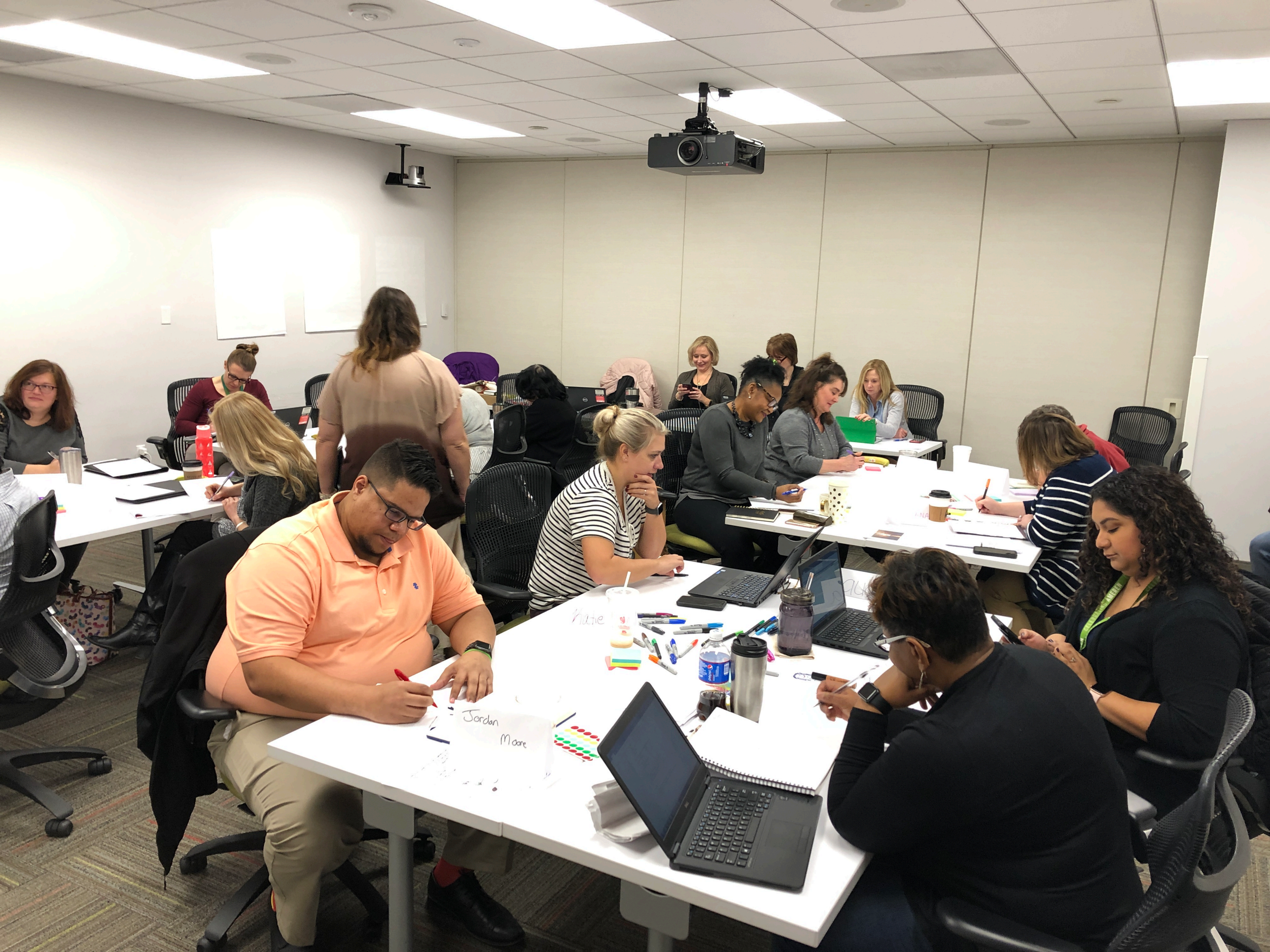
UX Recap

Grace Buenrostro

Data that Informs Us

- Usability Studies
- Analytics
- Ride Alongs
- Interviews
- Field Studies


Jordan
Moore

Think+Feel
See
Say+Do
Gain
ILIK

Interviews

Quintana Blue Interview
Tuesday, January 15, 2019
8:57 AM
Questions by Justin Ranton
Answers by Quintana (Quinnie) Blue, Customer Service Specialist for Business Center

Explain your role.
Support CSRs and projects with the focus to the Business Center

When you were a CSR for the residential side, did you handle the move-in/move-out process?
Yes, I did.

Have you worked for another utility?
No

Do you use time management non-work tools?
Facebook, Instagram

When shopping or using apps, is there one that has a good user experience??
Guest Pay feature on sites. Banking website used to pay mortgage. Likes because it is not necessary to log in and it is fairly easy and fast. Keeping track of user ID/passwords requires a lot of effort due to the charac
requirements.

Typical day
15-min commute to work
Log in

Project Work
Morning meeting - project update
Testing
Conversing with different members of the testing team
Writing scripts
Logging issues

Off-Project Work
Short-term extension set up for CSRs
Assisting KAE
Assigning and designating KAE to accounts
Communication
Mail-merge
Daily motivational message to customer service
KAE Supports
Support BC CSRs

CONNECT

G, L

Services Verification AMI EMR

Contact Information

PROGRAMS / ALERTS

Deposit Assessment

Supply Choice

Check field work complete gas pilot

Gas Pilot Relight

Schedule Connect

Connect Confirmation

Process

Confirm

Policies

Re-Retrieve pending active acct

Account Details

ALERTS

Paperless Bill

Provide new acct #

Deposit increase decrease WFM

Move Contact Type

AMR

AMI EMR

Verify Meter

Meter

Service Type

Bill Acct Info CSS

Task List

Tasks List (CCP)

Task List

Bill Acct Transfer Preference Transfer Window

Task List

Deposit

Transfer Checkbox

open

Task List

Connect order info CSS

ODA

order date avail.

ODA

CSP

POP

CSS Retrieved

CCP

ph# mail add email

IFACTOR

CSR HOD

Phone

CSS

IC client

Complete

we don't do anything no update

Help window

Manually add deposit amount

Starts conversation

different process for light

Slow errors out

Bankruptcy diff deposit amounts

multiple suppliers

Indicate connect start date

min

AMI Creates new account

Auto open

Slow!!

Relocation to set future

invalid phone #

SLOW!!

Connect Center

Automated

wish we used this longer

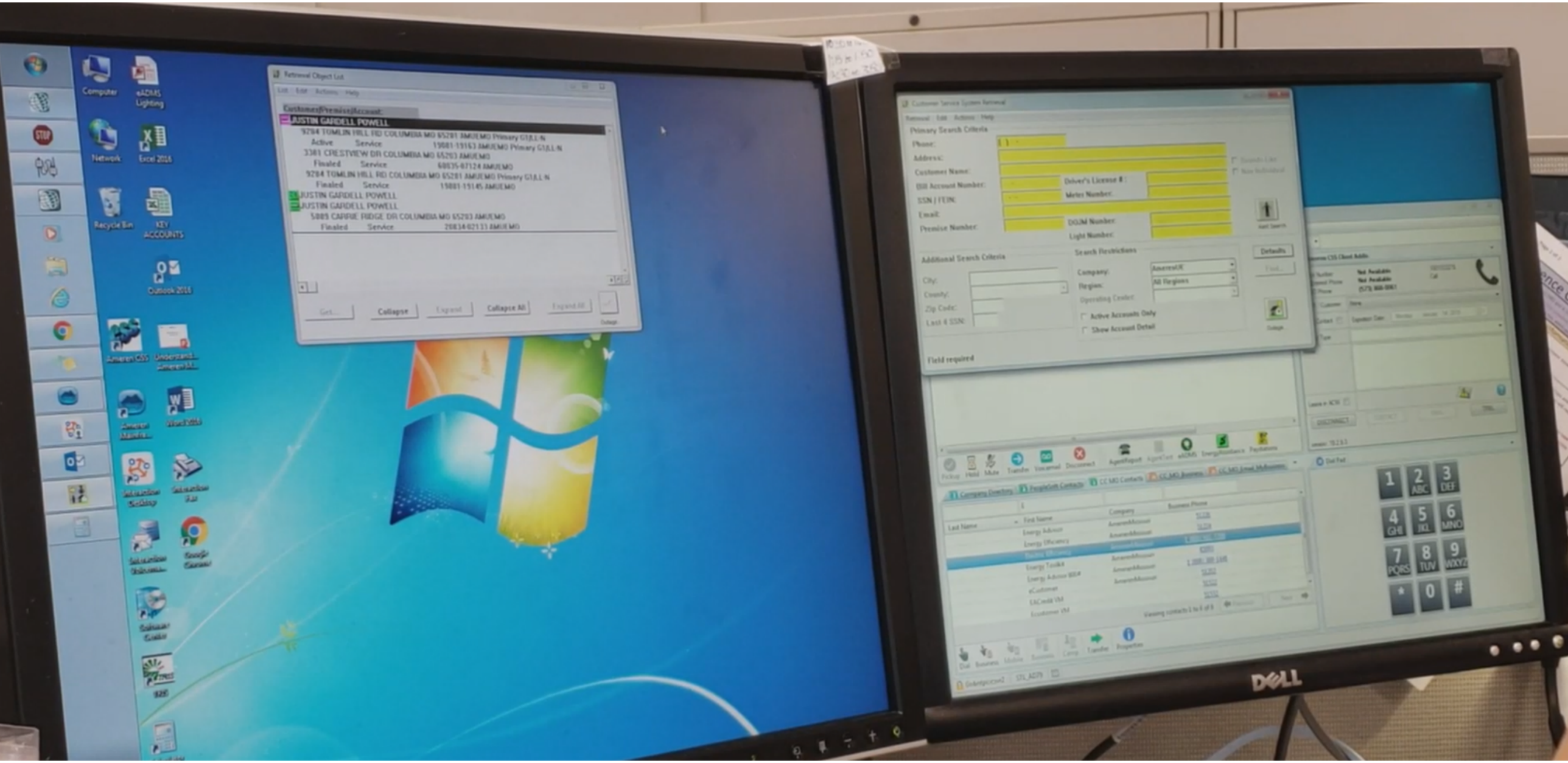
Automate

Check bad acct #

Chat connect button

Check bad CL (pic) Show error

Teach Deposit Resolve Button


Computer
eADMS Lighting
Network
Excel 2016
Recycle Bin
KEY ACCOUNTS
Outlook 2016
Ameren GSS
Understand... Ameren M...
Word 2016
Retrieval Object List
JUSTIN GARDELL POWELL
Collapse
Collapse All
Primary Search Criteria
Additional Search Criteria
Search Restrictions
Defaults
Field required
DELL

Alignment Tool

Persona

Shelly Jones

Move In/Move Out

Personality

Self Motivated — Externally Motivated

Introverted — Extroverted

Technology

Not Tech Savvy — Tech Guru

Limited Internet Use — High Internet Use

Bio

Shelly Jones has been with Ameren 5 years and performs the Move In/Move Out duties for customers. She does not feel the training is adequate, but is more than up for the challenge. She uses work arounds to supplement the current system to be more efficient in providing the best service for the customer. Takes pride in a job well done, often placing the customer over her KPIs and making up for the extra time spent providing a better experience on more simple calls.

Shelly tends to place the responsibilty of making the system work for the customer on herself. She believes, in time, her knowledge of a new system will overcome its shortcomings.

Goals

- Locate customer information as fast and accurately as possible
- Provide value to the customer by solving their issues.
- Meet KPIs

Devices & Tools

Motivations

- Overall customer satisfaction via problem solving
- Ability to quickly identify and solve problems
- Knowing that a customer is satisfied with their interaction
- Confidence that they're doing the right steps, asking the right questions, providing the right info.

Pain Points

- Validating Premise
- Pertinent information not arranged properly
- System simply does not work at times
- Poor visibility for comparison (accounts and premise)
- Poor visibility for where they are in process

Shelly Jones

Think & Feel?

- If the system would just work I could easily do my job
- Providing the best experience for the customer is the point
- Proper training and I would have no problem using any system
- If all info was on the same screen, it would be better
- Very optimistic and ready for something new
- Wants to be a part of the solutioning
- Processing customers emotions, moods, and feelings can be taxing

Hear?

- This new system is going to solve all of their problems
- They (IT/CRM) want our input, but are they listening?
- Customers' frustrations
- Satisfied customers
- Be more efficient with their handle times.

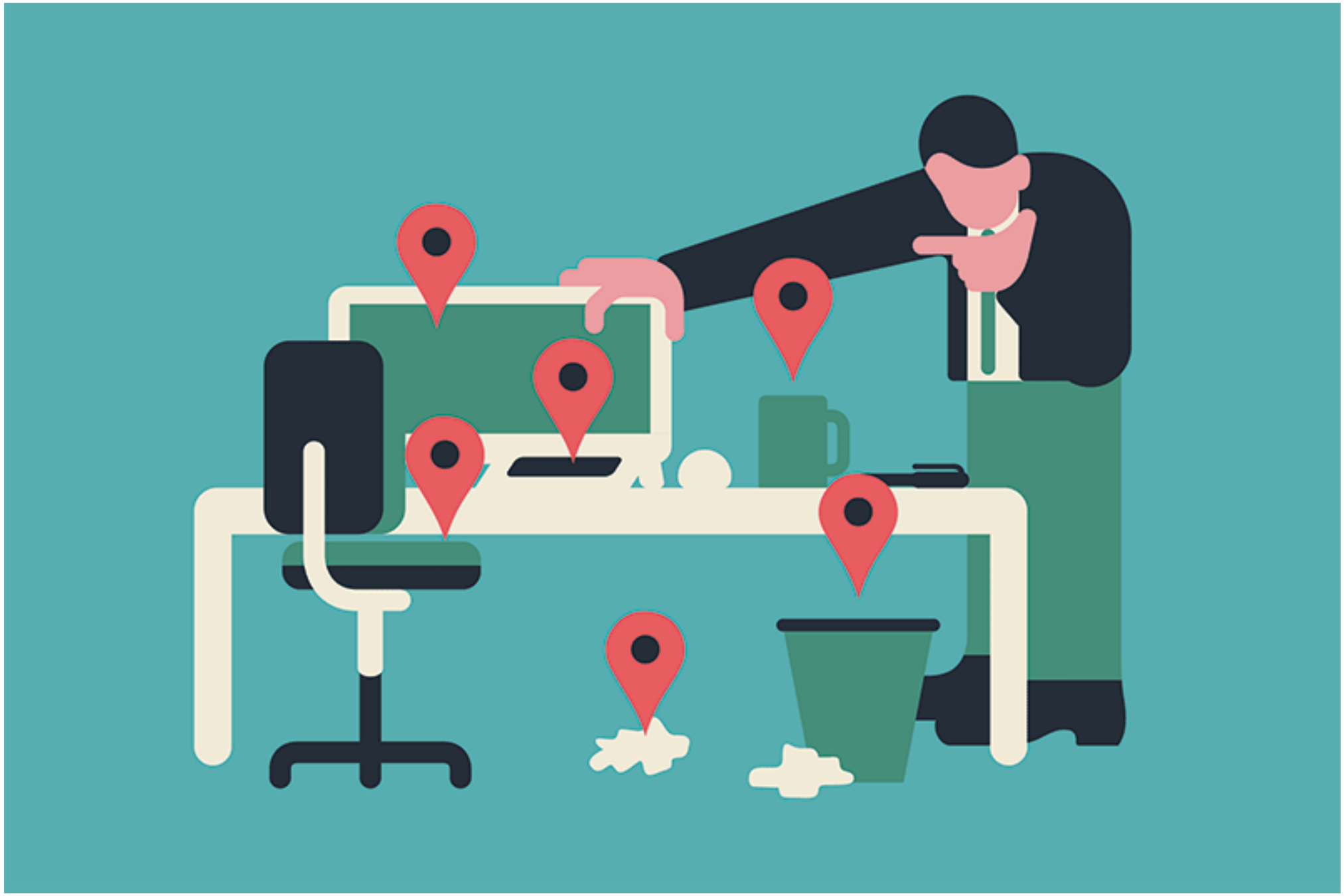
See?

- Lots of screens
- Inability to locate address effectively
- copy and pasting from various sources
- multiple systems
- vertical screens and long scrolls

Say & Do?

- Forgets parts of script due to lack of visibility in process
- Even with information all on one page, struggles to locate pertinent information
- Uses sticky notes/notepad to keep track of information they may need later
- Modifies process to fit their style, using script as baseline.
- Seeks help from lead and other departments when blocked from proceeding due to permissions or when encountering a problem they don't understand.
- Manual calculations

Experience Map



COMPLETE REQUIREMENTS
Corporate Requirements
Scalable and Dynamic Web Applications
Usability
Usability Specialists
Visual Design
Interaction Design
Information Architecture
Scalable and Dynamic Web Applications
Scalable and Dynamic Web Applications
Scalable and Dynamic Web Applications

COMPLETE REQUIREMENTS

IF → THEN
DEPOSIT

? BUISNESS

- ID COMPANY RESTRAINTS
CONSOLE PROBLEMS

Problem - Solving
- ID CUSTOMER NEEDS
- Collecting information on account
- Looking at the overall picture of the account
- Attempting to complete customer request

ALL THREE

Tell them about alternative services

OUR (In & Transfer) out

Address holds on account (if any)

Address holds on account (if any)

Premise Eligibility

Update/create

Verify Deposit

Verify Depo

Update

Update

Create a profile | Calculate Deposit | Schedule time of service | Answer Questions

Create a profile | Calculate Deposit | Schedule time of service | Answer Questions

Close out account | Schedule time of service | Answer Questions

↳ OUTSTANDING BILL REQUIRES

FLAGS

MOVE OUT TELLING # CONFIRM OUR SERVICE ↳ SEP. GAS, ELE., LIGHTING

"How can I help you today?"

"Congratulations on..."

"I hate making a customer call back."

"I hope I won't have to put them on hold."

"Why do we have to make them worry about one more thing?"

The Avg Bill at this location is...

"I'm lowering your bill by..."

"We don't have that information..."

TELL ME EXPLAIN

What date works for you...

"I don't know how to answer the question."

"I CAN'T ANSWER THAT DO TO POLICY"

"Are you interested in ..."

"I feel like a saleman."

I wish I use my on

Complete Requirements

- Advertising campaigns
- Strengthening customer / company relationships
- ATTEMPT TO COMPLETE TASK

Ask about Budget Billing | Ask about Alerts

Description:

Shelly tries to avoid putting the customer on hold or making the customer call back in the future. She makes sure to celebrate the customer's move regardless of whether they will stay an Ameren customer. Shelly worries about adding unnecessary stressors to the customer's life such as asking for a desposit. She welcomes questions about their services and does her best to answer them even if the information may not necessary be available.

Description:

Shelly understands Ameren is trying to help custom
she dislikes having to pitch to the customer what e
customer called.

OFFER EVERYTHING, u
USE HER OW

Customer Service Representative Experience Map

Shelly Jones

- Worked with Ameren for 5 years
- Performs the Move In / Move Out / Transfer
- Uses workarounds to supplement the current systems
- Often puts customer needs above meeting her KPIs

Goals

- Locate customer information as fast and accurate as possible
- Provide value to the customer by solving issues
- Meet Key Performance Indicators (KPIs)

Verify

- Checking address and identifying person
- Protecting company assets

Problem - Solving

- Collecting information on account
- Identity customer needs
- Identity company restraints
- Looking at the overall picture of the account

Complete Requirements

- Advertising campaigns
- Strengtening customer / company relationships
- Complete customer's task

Confirm

- Double checking task(s) were done to customer's satisfaction

Actions

Move In
Transfer
Move Out

- Look up address(s)
- Ask customer to provide Account or Social Security Number (SSN)
- Check customer eligibility
- Check who is on the account
- Check for old balance
- Check for premise eligibility and red flags
- Tell customer about our services - gas, electric, and lighting
- Update and create a profile → Verify deposit Calculate deposit (if needed) → Answer Questions → Schedule time of service → Verify/ update email and phone number → Ask about Budget Billing
- Update profile → Verify deposit Calculate Deposit (if needed) → Answer Questions → Schedule time of service → Verify/ update email and phone number → Ask about Budget Billing
- Update and close out account → Answer Questions → Schedule time of service → Verify/ update email and phone number → Ask about Paperless Billing
- Ask about Alerts
- Ask about Paperless Billing
- Confirm Mailing address
- Restate time and date of service/ task and address
- Answer Questions
- Thank customer for calling and tell them about the survey

Said

- "Hi my name is..."
- "I'm sorry for your experience."
- "Who am I speaking to?"
- "How can I help you today?"
- "Congratulations on..."
- "The average bill at this location is..."
- "What date works for you...?"
- "Are you interested in ..."
- "Is this correct..."
- "Have a great day."
- "Stay on the line if you would like to fill out a survey."

Thoughts and Feelings

- "Please don't get mad at me, I'm trying to help."
- "How many websites and systems do I need to go through?"
- "I hope I'm not helping someone commit fraud."
- "I hope I won't have to put them on hold."
- "Why are there duplicate accounts?"
- "I hate making a customer call back."
- "Why do we have to make them worry about one more thing?"
- "I can't answer that do to policy."
- "Customers love when I offer alerts..."
- "I wish I could use my judgment on what to offer."
- "I feel like a salesman."
- "Almost Done."
- "I'm happy that I was able to help."

Description:

Shelly is often responsible for completing tasks for customers that they were not able to do so on other channels. She often apologizes for the difficulty. While trying to found the account she is frustrated and overwhelmed by the number of websites she has to nagivate through. Shelly gets annoyed with her limited ability to make changes to the system. She can only add and log notes.

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Shelly tries to avoid putting the customer on hold or making the customer call back in the future. She makes sure to celebrate the customer's move regardless of whether they will stay an Ameren customer. Shelly worries about adding stressors to the customer's life such as asking for a deposoit. She welcomes questions about their services and does her best to answer them even if the information may not necessary be available.

Description:

Shelly understands Ameren is trying to help customers by offering what services they have but she dislikes having to offer everything. Shelly wishes she could use her own judgement to decide what to offer to the customer. She knows that the customer did not call to hear about other services we can offer them.

Description:

Shelly double checks her work with the customer. She hopes she didn't mess anything up so she won't have to nagivate more pages and make the customer wait. She is very happy when the customer states how it was easier than expected and she was very helpful.

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Transfer
Move Out

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Check customer eligibility

Check who is on the account

Check for old balance

Check for pr
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Tell customer about our services - gas, electric, and lighting

Update and create a profile

Update profile

Update and close out account

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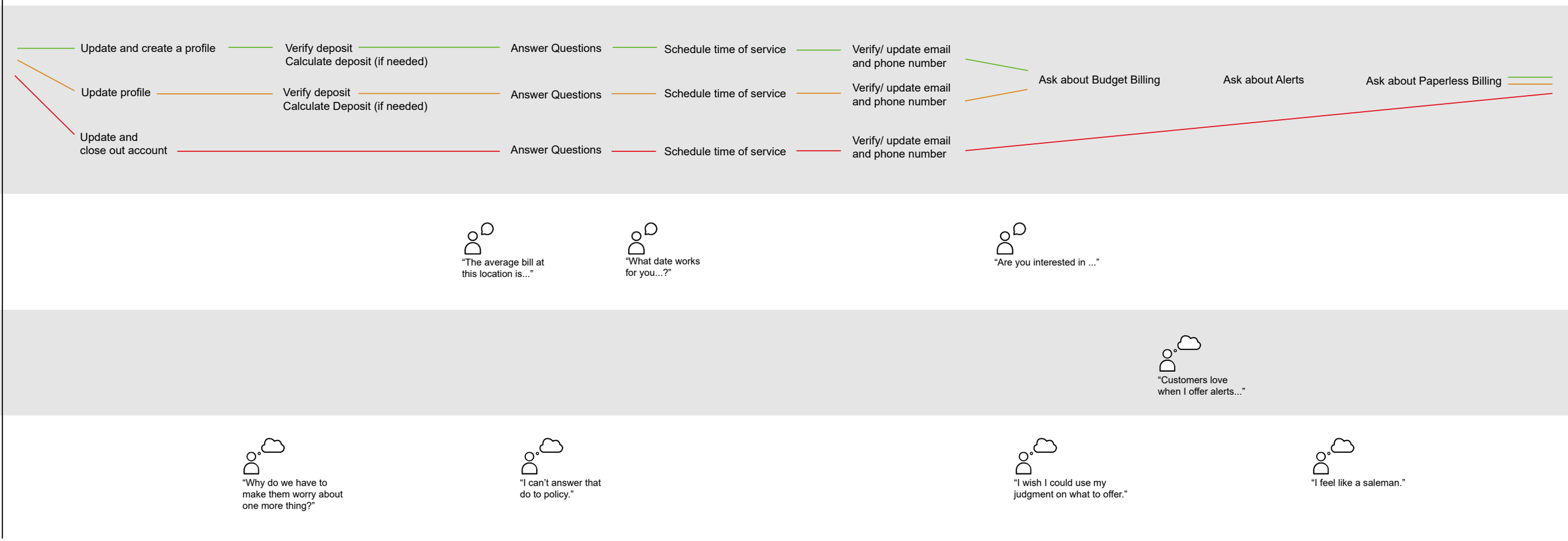

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Confirm

- Double checking task(s) were done to customer's satisfaction

Confirm
Mailing address

Restate time and date of
service/ task and address

Answer Questions

Thank customer for calling
and tell them about the survey

"Is this correct..."

"Have a
great day."

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like to fill out a survey."

"Almost Done."

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Brainstorming Time!

Brainstorming Goal

- Collect a list of possible solutions to the different phases
  - Verify, Problem-Solving, Complete Requirements, Confirm
- The goal is not to move forward with all the ideas!

Brainstorming Expectations

- Quantity over quality
- Get through ideas quickly
- Create a hypothesis!

Crazy 8

- 8 boxes, 8 minutes
- Individual ideas with descriptions and drawings
- Present
- Repeat!

Brainstorming Goal

- How can we help Shelly verify, problem-solve, complete requirements, and confirm customer service orders?

How can we help Shelly verify a customer?

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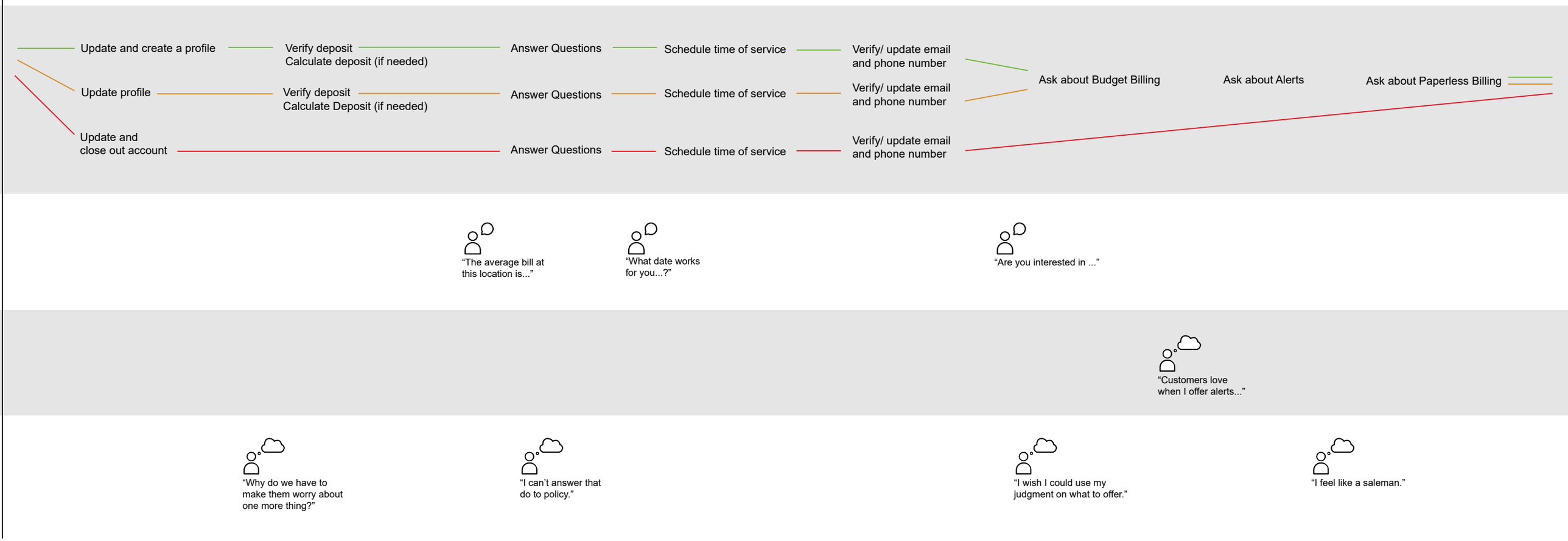

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Recap

Recap