

Design Phase 1

Contextual inquiry - Part interview, Part observation

AOL Membership Design



Plan

Method

- Contextual inquiry – Part interview, part observation
- Tools: WebEx screen share, VTC

Participants

4 x Sales call agents from Sutherland, Rochester; 30 min each; 2 days

Materials

Document: [Plan & Hypotheses](#)

Modal: http://orreba.axshare.com/prototype_v5.html

Master flow: http://orreba.axshare.com/prototype_v5_-_master_flow.html

Custom console component: http://orreba.axshare.com/prototype_v5_-_side_bar.html

Success measures

- Intuitive but more importantly that it's **learnable** i.e. first time use can fail, but not there afterwards
Observe: Learnability of users' ability to access and navigate to view Offers or Products
- Sales call **conversation is improved** with the proposed design
Observe: Overall efficiency and flexibility in completing a sales flow
- Success rate (whether users can perform the task at all)
- Time a task requires
- Error rate
- Users' **subjective satisfaction**

Hypotheses & Results

Filter products

Hypothesis: Users will find filters useful to refine products

Found value in:

- Customer needs (4P)
- Devices & services (4P)
- Usage (1P)

Participants found 'Customer behaviours' and 'Products' nice to have

3 out of 4 participants clicked to 'Show more filters' immediately without prompting

Filter - Search for products

Country

US US - LCA Canada UK

Show more options

Filter - Search for products

Country

US US - LCA Canada UK

Hide more options

Customer needs (1) <ul style="list-style-type: none"><input checked="" type="checkbox"/> 24 hour support<input type="checkbox"/> ID protection<input type="checkbox"/> Money back guarantee<input type="checkbox"/> Online security<input type="checkbox"/> Remote help<input type="checkbox"/> Repair & replace	Customer behaviours (2) <ul style="list-style-type: none"><input checked="" type="checkbox"/> Connect w/ family<input checked="" type="checkbox"/> Family focused<input type="checkbox"/> Not tech savvy<input type="checkbox"/> Retired<input type="checkbox"/> Social media	Products (1) <ul style="list-style-type: none"><input checked="" type="checkbox"/> Datamask by AOL<input type="checkbox"/> McAfee<input type="checkbox"/> MyPrivacy<input type="checkbox"/> MyReputation<input type="checkbox"/> Password Manager<input type="checkbox"/> Photobucket<input type="checkbox"/> Password Manager
Devices & services (2) <ul style="list-style-type: none"><input checked="" type="checkbox"/> Desktop<input checked="" type="checkbox"/> Internet - Cable<input type="checkbox"/> Internet - Dial up<input type="checkbox"/> Internet - DSL<input type="checkbox"/> Mobile - Smartphone<input type="checkbox"/> OS - Mac	Usage <ul style="list-style-type: none"><input type="checkbox"/> Free<input type="checkbox"/> 1 - time<input type="checkbox"/> Monthly<input type="checkbox"/> Yearly<input checked="" type="checkbox"/> No preference	

Apply Clear all filters

Locating products

Hypothesis 1: Search and filters allow call agents to gain quicker access to the script for a particular product

Hypothesis 2: Grouping of products in scrollable list is easier to scan and locate specific products

Participants immediately scrolled and responded positively to formatted scroll box (may be due to an improvement to something familiar)

Participants did not notice or comment on the search textfield. It may be a nice to have.

Participant: “Depends if it performs well”

Search for products



VS

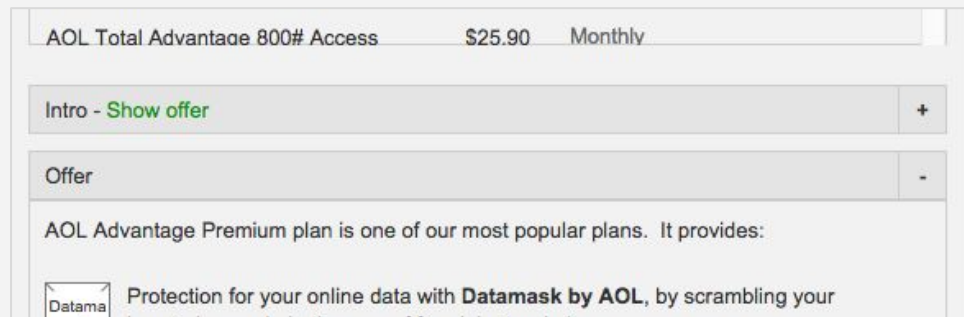
Products		
AOL		Free
Use your own email (MORF)		Free
AOL Advantage Premium - Lead Offer	\$14.95	Monthly
AOL Advantage Plus	\$11.99	Monthly
AOL Support & Security Plus	\$7.99	Monthly
AOL Support Plus	\$4.99	Monthly
AOL Total Advantage 800# Access	\$25.90	Monthly

Progressing through the flow

Hypothesis: Providing call agents the ability to step back in a flow will allow agents to remediate slips / mistakes or if customer changes their mind

All participants understood (without prompt) they could go back and forth through the flow using the headers with '+' and '-'

Participant: "Helpful with customers sitting on the fence, going back and forth... I don't need 30 thousand clicks"



Customer search results

Hypothesis 1: First level of attributes in Search Results are sufficient information to distinguish members

Hypothesis 2: Second level of attributes are still valuable for the agent

Hypothesis 3: Agents will recognise the colour coordination for an account number to be active/inactive

Participants mainly use:
Screen name, email, phone number,
billing location

Participant: “95% of customers don’t know their account number”

Results for Paul Smith (9)						
Account #	ScreenName	F name	L name	Email	Billing location	
123456789	Pa5	Paul	Smith	qwerty1234@aol.com	New York	+
123456789	Smith8013	Paul	Smith	qwerty1234@aol.com	Huntsville	+
123456789	Psmith6	Paul	Smith	qwerty1234@aol.com	Huntsville	+
123456789	Smithde10	Pauline	Smith	qwerty1234@aol.com	Hamburg	+
123456789	Comtest29	Paul	Smith	qwerty1234@aol.com	Dallas	+
123456789	Pspaxpacfe	Paul	Smith	qwerty1234@aol.com	Huntsville	+
123456789	psmith	Paul	Smith	qwerty1234@aol.com	Salt Lake	+
123456789	Paula807	Paula	Smith	qwerty1234@aol.com	Huntsville	+
123456789	PaulSmith	Paul	Smith	qwerty1234@aol.com	Huntsville	+
123456789	PaulSmith	Paul	Smith	qwerty1234@aol.com	Huntsville	+

123456789	Paula807	Paula	Smith	qwerty1234@aol.com	Huntsville	
123456789	PaulSmith	Paul	Smith	qwerty1234@aol.com	Huntsville	+
123456789	PaulSmith	Paul	Smith	qwerty1234@aol.com	Huntsville	-
Active	[RelatedScreenName]				AL, United States	

Offers panel

Hypothesis 1: Having an Offers right panel will give agents flexibility to pitch an offer

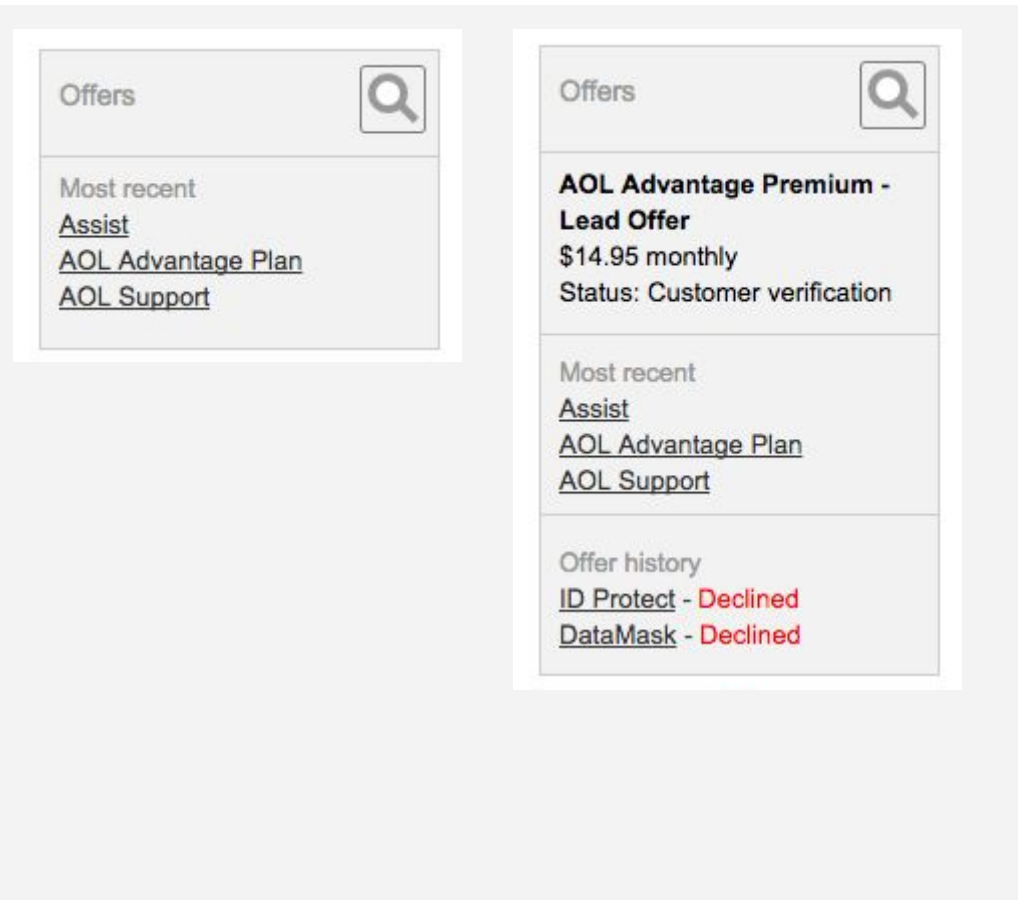
Hypothesis 2: Most recent / popular searches will be used often

Hypothesis 3: Recording of customers offer history and previously searched products per case will provide a valuable insight into customers needs

One participant noticed the selected product was referenced in Offer panel

One participant understood the listed product would filter search results

Participants did not respond to 'Most recent' and 'Offer history' (may be due to new functionality or did not see value)



Modal vs Master flow

Hypothesis: Usability of modal or offers in a master flow does not hinder the experience; easy and quick to access

Participants who needed prompting of locating Offers only required it once

All participants learnt how to switch between 'Member search' and 'Offers'

No clear distinguisher which layout performed better

This screenshot shows a modal window titled 'Search for products' overlaid on a Salesforce interface. The modal has a search bar at the top and a filter section with radio buttons for 'US', 'US - LCA', 'Canada', and 'UK'. Below the filter is a table of products with columns for product name, price, and frequency.

Products	Price	Frequency
AOL	Free	
Use your own email (MORF)	Free	
AOL Advantage Premium - Lead Offer	\$14.95	Monthly
AOL Advantage Plus	\$11.99	Monthly
AOL Support & Security Plus	\$7.99	Monthly
AOL Support Plus	\$4.99	Monthly
AOL Total Advantage 800# Access	\$25.90	Monthly
AOL Total Advantage	\$25.90	Monthly 90-day Risk Free

On the right side of the modal, there is an 'Offers' section with a search icon and a list of offers: 'Most recent', 'Assist', 'AOL Advantage Plan', 'AOL Support', and 'Offer history' with sub-items 'ID Protect - Declined' and 'DataMask - Declined'.

This screenshot shows a Salesforce form titled 'Member search' with various input fields for user information. The form is set against a background of the Salesforce interface with tabs for 'Cases', 'New contact', and 'Offers'.

Member search

Screen name: Account #: Case #:

Screen name: 6-10 digits:

First name: Last name:

Phone number: Alternate email:

e.g. XXX XXX XXXX example@email.com

City: Postal code: State:

Select State:

Submit

Other insights

Product information

All participants felt the 'Intro' script would be useful. However, 3 out of 4 participants requested more product information.

Participants responded positively to the information within 'Offer'.

Participant: "Wish I had more information... Ahh there we go"

Suggestion: Combine 'Intro' and 'Offer' content

Products			
AOL	Free		
Use your own email (MORF)	Free		
<hr/>			
AOL Advantage Premium - Lead Offer	\$14.95	Monthly	
AOL Advantage Plus	\$11.99	Monthly	
AOL Support & Security Plus	\$7.99	Monthly	
AOL Support Plus	\$4.99	Monthly	
<hr/>			
AOL Total Advantage 800# Access	\$25.90	Monthly	
AOL Total Advantage	\$25.90	Monthly	90-day Risk Free

Intro

I'd be happy to reactivate your account today with a free month of service and waive the prorated reactivation fee so that you can get online immediately and protect your computer by downloading the McAfee Software.








AOL is a great way to experience the Internet -- It's easy to use, has great safety features, and is a lot of fun so let me tell you a little about the plan I think will be the best option for you.

Would you like to reactivate your account today with 1 free month of service?

Show offer
Decline

Offer

AOL Advantage Premium plan is one of our most popular plans. It provides:

-  **Datamask** by AOL, by scrambling your keystrokes and alerting you of fraudulent websites
-  **LifeLock Identity Theft Protection** that proactively monitors your personal information for fraud 24/7
-  **PRIVATE WiFi** provided by AOL, which encrypts everything you send and receive on your computer or mobile device over public WiFi
-  **McAfee** protection for up to 3 computers against viruses, spyware and hackers and more
-  24/7 tech support with **Assist by AOL**. Our U.S.-based experts can help remove viruses, speed up your slow PC and set up or install just about any device
-  One place to store, edit and share your photos on the go, plus get 50 FREE 4x6 prints per year with **Photobucket Plus** by AOL
-  A secure place to store your online passwords and log into your favorite sites with **AOL OnePoint**

...and much more!

You get all this for just \$15.99 a month! Once you are set up, you will receive a Welcome Email that describes all the great benefits that come with the AOL Advantage Premium Plan. Should we get you started on this plan today so you can take advantage of all these great products?

Agent Note: For more detailed information about this plan and its products, click here.

Accept
Can't pitch
Decline

Notes

One participant inquired and guessed the proposed interaction & functionality of the Notes tab and found it useful

i.e. Notes will be minimized and accessible at all times as a modal

The screenshot displays a Salesforce user interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and links for 'Help & Training', 'Support console', and 'User name'. Below this, a 'Cases' section is visible, with a 'New contact' button. A modal window is open, titled 'New contact', which contains a search bar and a 'Filter' section. The 'Filter' section has radio buttons for 'Country' with options: 'US' (selected), 'US - LCA', 'Canada', and 'UK'. Below the filter, there is a 'Products' section with a table of offers. The table lists various AOL products and their monthly fees. At the bottom right of the interface, there are two buttons: 'Notes' and 'Soft phone'.

Products	Price	Frequency
AOL	Free	
Use your own email (MORF)	Free	
AOL Advantage Premium - Lead Offer	\$14.95	Monthly
AOL Advantage Plus	\$11.99	Monthly
AOL Support & Security Plus	\$7.99	Monthly
AOL Support Plus	\$4.99	Monthly
AOL Total Advantage 800# Access	\$25.90	Monthly
AOL Total Advantage	\$25.90	Monthly 90-day Risk Free

Knowledge base

Access to Knowledge Base from starting screen

The screenshot shows a Salesforce interface for creating a new contact. The top navigation bar includes the Salesforce logo, a search bar, and links for Help & Training, Support console, and User name. The main content area is titled 'New contact' and features a 'Member search' form. To the left of the form is a sidebar with navigation links: Member search, Gifting search, Create account, Registration Inq, Member education emails, and Order AOL CD. To the right of the form is a sidebar with 'Offers' and 'Most recent' sections. The 'Offers' section lists 'AOL Advantage Premium - Lead Offer' with a price of \$14.95 monthly and a status of 'Declined'. The 'Most recent' section lists 'Assist', 'AOL Advantage Plan', and 'AOL Support'. The 'Offer history' section lists 'ID Protect - Declined' and 'DataMask - Declined'. The 'Member search' form includes fields for Screen name, Account # (6-10 digits), Case #, First name, Last name, Phone number (e.g. XXX XXX XXXX), Alternate email (example@email.com), City, Postal code, and State (Select State). A 'Submit' button is located at the bottom of the form. At the bottom right of the page, there are two buttons: 'Notes' and 'Soft phone'.

Salesforce Search keyword or product Search Help & Training Support console User name

Cases **New contact** +

[Member search](#)

[Gifting search](#)

[Create account](#)

[Registration Inq](#)

[Member education emails](#)

[Order AOL CD](#)

Member search

Screen name Account # Case #

Screen name 6-10 digits

First name Last name

Phone number Alternate email

e.g. XXX XXX XXXX example@email.com

City Postal code State

Select State

Submit

Offers

AOL Advantage Premium - Lead Offer

\$14.95 monthly

Status: Declined

Most recent

[Assist](#)

[AOL Advantage Plan](#)

[AOL Support](#)

Offer history

[ID Protect - Declined](#)

[DataMask - Declined](#)

Notes Soft phone

Feed filter

One participant mentioned the default view to be 'Account details' is more useful

Suggestion: Set to Account details

The screenshot displays a Salesforce CRM interface for a contact record. The top navigation bar includes the Salesforce logo, a search field, and links for Help & Training, Support console, and User name. The main header shows tabs for Cases, New contact, Offers, and Offer pitch. The left sidebar contains sections for Customer Info (Address, Phone, Email) and Account information (Since, Account #, Screen name, Status, Block, Type, Account actions). The central area features a FEED FILTERS section with 'All Updates' and a main content area titled 'All Updates for this case' showing a list of updates from Stephanie Dorman. The right sidebar displays subscription offers such as AOL Support & Security Plus, AOL Advantage Plan 1, AOL Advantage Plan 2, and Advantage Plan (27).

Schedule a call back

One participant suggested the functionality to schedule a call back within the Rebuttal section

The screenshot displays a membership offer card with a rebuttal section. The offer details are as follows:

Plan Name	Price	Term	Features
AOL Total Advantage	\$25.90	Monthlv	90-day Risk Free

Below the offer, there are three expandable sections:

- Intro** - [Show offer](#) (+)
- Offer** - [Decline](#) (+)
- Rebuttal** (-)

The Rebuttal section contains the following text:

Too expensive | Similar service | Generic

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo. Proin sodales pulvinar tempor. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nam fermentum, nulla luctus pharetra vulputate, felis tellus mollis orci, sed rhoncus sapien nunc eget odio.

At the bottom of the Rebuttal section, there are three buttons:

- Accept** (Green button)
- Not interested** (Yellow button)
- Decline** (Red button)

Key takeaways

- As participants are experts with the current Salesforce tool, they seemed comforted with the design being aligned to the current experience:
“It seems familiar”, “Looks similar”
- They quickly spot and validate what is different:
“Where is knowledge base?”
“Ok everything is there, just moved” [Verified left hand navigation]
- Overall very positive and encouraged the design direction [may be skewed due to testing methodology – people pleasing]

Next steps

High fidelity wireframes for Custom console component

Visual design & Copy – Guide for interaction and style

Refine filter attributes; what we need i.e. include tablet

Questions: Do we need the Intro box to trigger the 'Flow' has been entered?

Do we want to consider resolving other design solutions? i.e. time-out for login, notes

Custom console component

Easier to develop / implement

Best of both worlds with 'Offers' being easily accessible and hidden when not needed

The screenshot displays a Salesforce console interface. At the top, there is a blue header with the Salesforce logo, a search bar labeled "Search keyword or product", and navigation links for "Help & Training", "Support console", and "User name". Below the header, the console is divided into three main sections: "Cases", "New contact", and a "+" button. The "New contact" section is active and contains a "Member search" form. The form includes fields for "Screen name", "Account #", "Case #", "First name", "Last name", "Phone number", "Alternate email", "City", "Postal code", and "State". A "Submit" button is located at the bottom of the form. To the right of the form is a vertical sidebar titled "Offers". The sidebar contains a "Most recent" section with links for "Assist", "AOL Advantage Plan", and "AOL Support". Below this is an "Offer history" section with entries for "ID Protect - Declined" and "DataMask - Declined".

Appendix

Main findings (from user observations & round table discussions)

Technical

Design

Product knowledge

Environment + materials

Call agents + the team

Technical

Timing out of system & Multiple logins

Frustrating for agents to log in during a call

System goes down / Slow, long loading time

Disruptive to the call and difficult to maintain the flow of conversation

Transfer information between Salesforce and Gandalf

Agents have to constantly check and duplicate customer information

Incorrect transfer of calls & lack of descriptive notes

May require customers to repeat their issue or be re-routed to another call

Gandalf has an outdated verification policy (is this true?)

Design

Navigation & Flows - Simplify complex and repetitive flows
Screens and interactions to cancel an order (very repetitive)

Knowledge Base Search

Users need to enter exact keywords; team manager and peers are quicker to resolve issues

Constantly copy + pasting between two systems

Case number, name, user id, solution, notes etc

Difficult to multitask

Users create new tabs to check info and not leave current placement in flow

Product knowledge

Customers' confusion with products

Customers don't know what they have or want
Difficult for agents to quickly assess the problem

Edge cases

Intensity of not knowing an answer or solution for the customer can create a lot of stress, frustration, anxiety & uncertainty

Environment + materials

Lots of noise and distractions

Neighbours helping each other but can be disruptive to the flow of call
Raise hand – the life line, help is not always available immediately

Lack of spanish translations

For majority of scripts + education emails

Inconsistent seating - hot desking

Materials get passed around
Desk change and posters change result in constant adjustments

Call agents + the team

Personal preferences for methodology

Order of conversation needs to be flexible i.e. meet customer wants/needs, find a solution, provide offers

Different learning curve for different personalities

Everyone adjusts differently

Special attention needs to be provided for specific people