USER EXPERIENCE CASE STUDY

WHEN THE CLIENT DOES NOT KNOW EXACTLY WHAT THEY WANT OR NEED

This telecommunication customer was in the process of acquiring two additional companies. The combined employee base was over 100,000. While waiting for the long and trying government approvals, they needed to be ready for what they called 'Day One – Deal Close'. On that day, all companies had to become one company while still maintaining some of their different systems.

We were brought in to bring clarity to the daunting process ahead. There were many questions and few answers. There were assumptions, but one can never assume a good user experience. In the background, we were also conducting usability testing to ensure the systems could suddenly handle the burst of users. There were many issues to consider, including privacy and HR issues, customer experiences, and to minimize the amount of IT Help Desk calls.

THE IT DEPARTMENT WAS THE NUCLEUS TO THE SUCCESS OF THE PROJECT

There are so many different roles played by IT departments in large corporations. Multiple teams formed to consider the many different applications and areas impacting all three companies. The team decided:

- All companies would use one email and communications system
- External customer solutions remained the same for minimum of 90 days
- Intranet would go from three to one – immediately on Day One
- IT Support Help Desk used from one company only
- Knowledge base documents updated to keep support calls low; however, company outsourced additional support desk help just in case
- Success rated by number or percentage of eligible users registered and volume of support issues

We worked with an outside UX consulting company and completed the following flow charts. The remainder in this case study were created without the outside UX consulting company.

Please note that because of the NDA and the sensitivity of the data, very few graphics are included in this case study and any confidential information is blurred.

THE MOST IMPORTANT QUESTION TO ASK IS WHY?

When considering what constitutes a good user experience, the most important question to ask is 'why'? If you can begin your project with that question, the creative juices flow, the ideation grows, the brainstorming and debate continues, and the project creates a life of its own.

We need personas. We need to study human behavior. What do the users currently do and is there a more effective way to handle the process? Is it all about color and interactivity or is there more to success? Which colors should we use and what do the colors mean? Is the design intuitive? Is the design able to be used by those with and without disabilities? Is there a process flow that makes the process more logical; however, is that perceived logic also a good human experience? The list goes on and on as we drill down into the many questions one answers during this process.

THE 50,000 FOOT VIEW

Those experienced in user experience design and research realize that what is included here is nothing but a small snapshot of the process, diagrams, and what ultimately becomes the finished product.

The following are a few screen captures of different deliverables.

TEST
MANAGEMENT
OFFICE

IT Test Management Office

Master Test Plan

FOR

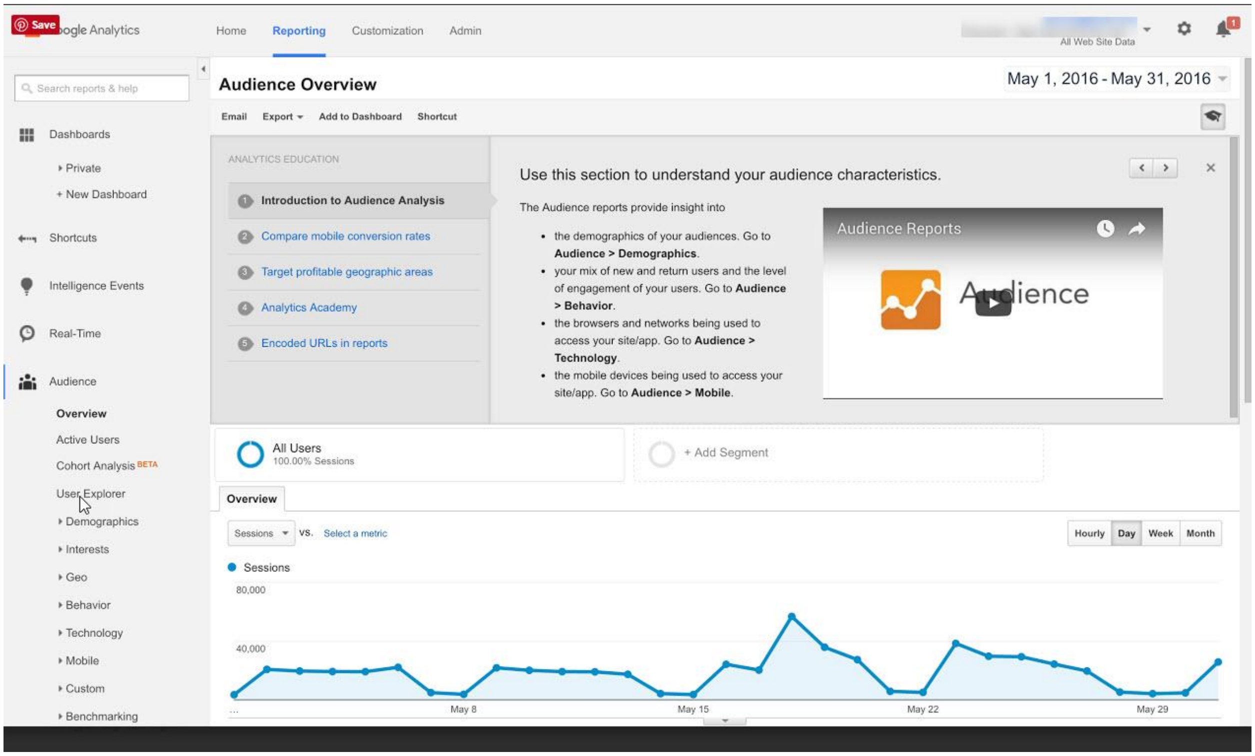
Work in Progress

Deal Close End-to-End Testing

Version 0.3

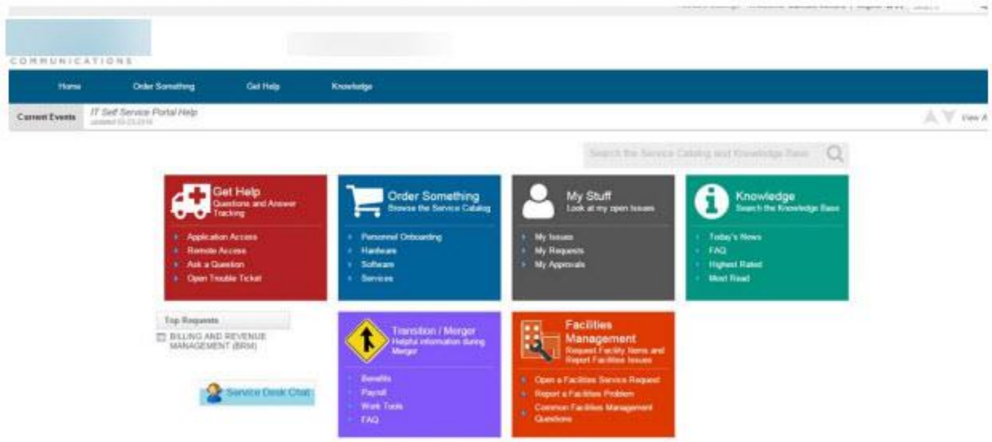
Last Updated **4/5/2016**

It was important to plan and execute the testing of priority systems to ensure they worked properly.

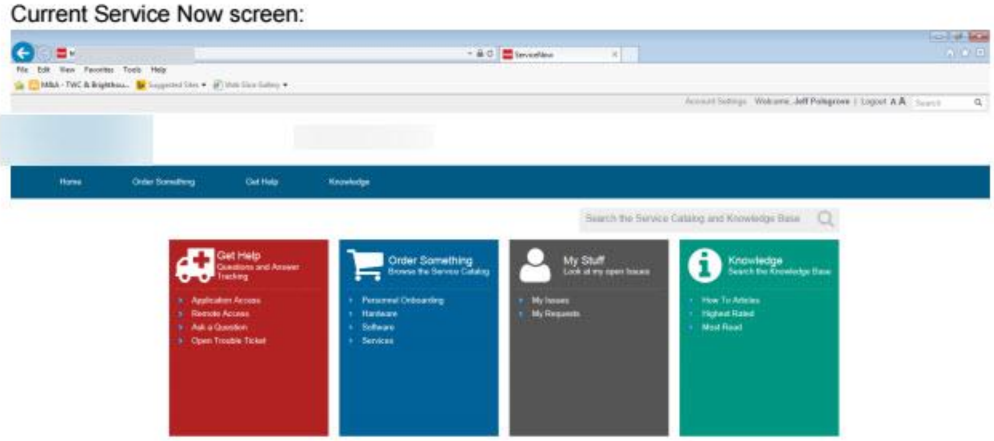


Measuring the use of the different pages and applications were an important piece of the project and actually helped to make the project a success. Analytics were tracked in the intranet page, IT Support page, and in individual Knowledge-base 'how to' articles. We were able to determine if the user actually visited the different sites, if they difficulties and abandoned the process at any stage, and what we could do in real time to correct anything.

New Service Now screen that will house the "how do I" info:



Current Service Now screen:



Changes to the home page of the IT Support portal were made. Although it was not ultimately what I considered to be the best design approach, it was what the customer wanted.

TELLING A STORY IS PARAMOUNT TO SUCCESS

Because of my background in training/instructional design as well as user experience and content strategy, a story is an important piece to a successful user experience. Users must be engaged. They need to read and see what is important and understand why it is important.

In this project, I designed a series of scenarios depicting what a sample employee or contractor from Company A, B, or C shall expect during the merger.

Day 1 - Account Registration

John – [redacted] Employee or Contractor

- John will be business as usual (BAU). He will use his current credentials and perform tasks as he always has.

Sheri – [redacted] Employee

Mike- [redacted] Contractor that currently have [redacted] email access

- Sheri and Mike receive an initial email from [redacted] 5 days before Deal Close that contains information about the benefits of [redacted] new email account, what services they can access, their new [redacted] credentials, and a link to http://[redacted]m. The email will be sent to their current [redacted] email address. See the emails in the next three slides.
- Part of Sheri and Mike's new [redacted] credentials is their unique Login ID they will use routinely when logging on to various [redacted] systems. All [redacted] Logon ID's are in the format P1234567 (the letter "P" followed by seven numbers).
- Sheri and Mike will also receive a second email 5 days before Deal Close that contains a temporary password specific to their new account. It will also be sent to their current [redacted] email address. See the emails in the next three slides.
- Contractors that currently DO NOT have [redacted] email access will not have email access to New [redacted] Day 1, and will be business as usual (BAU).

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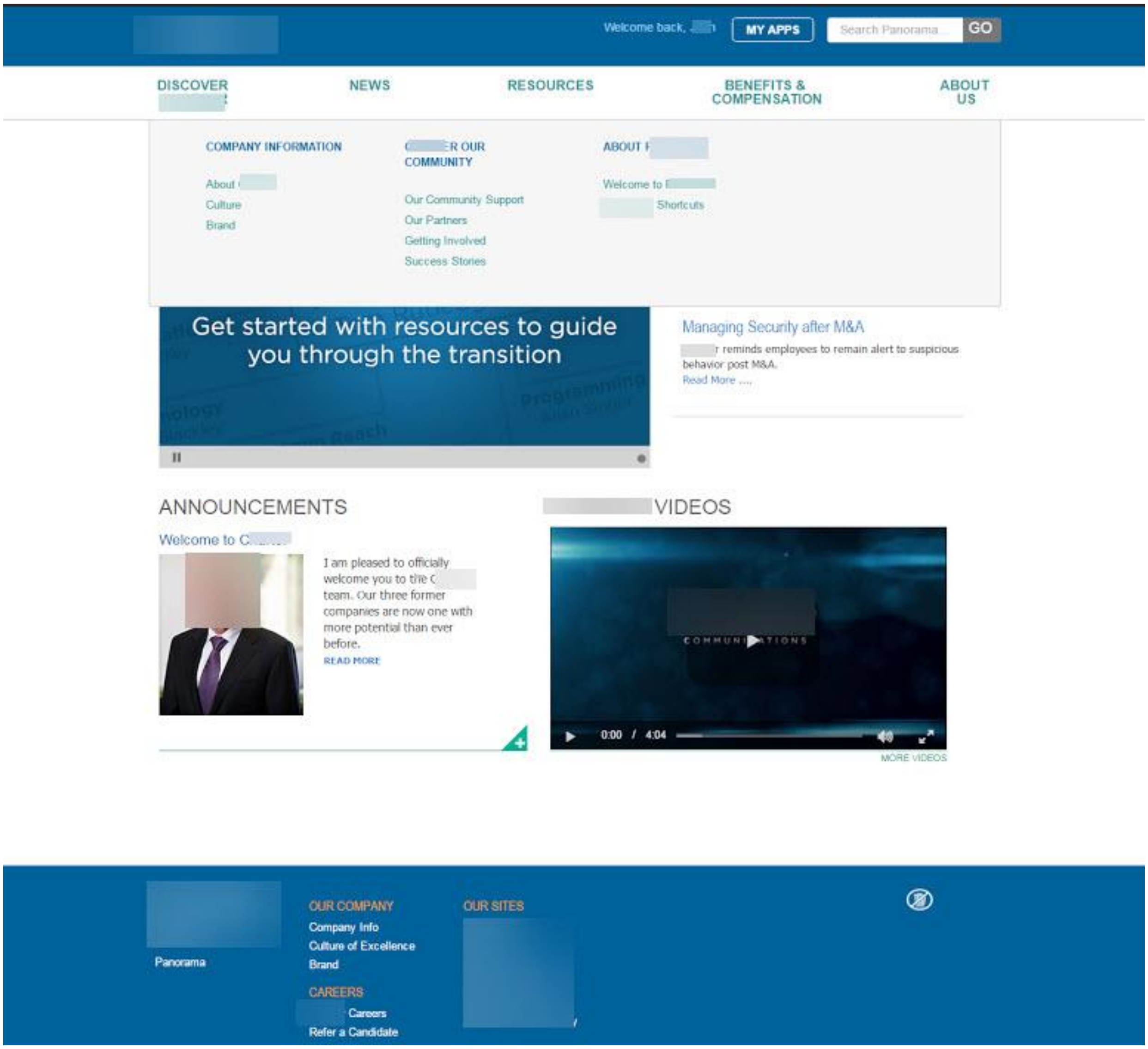
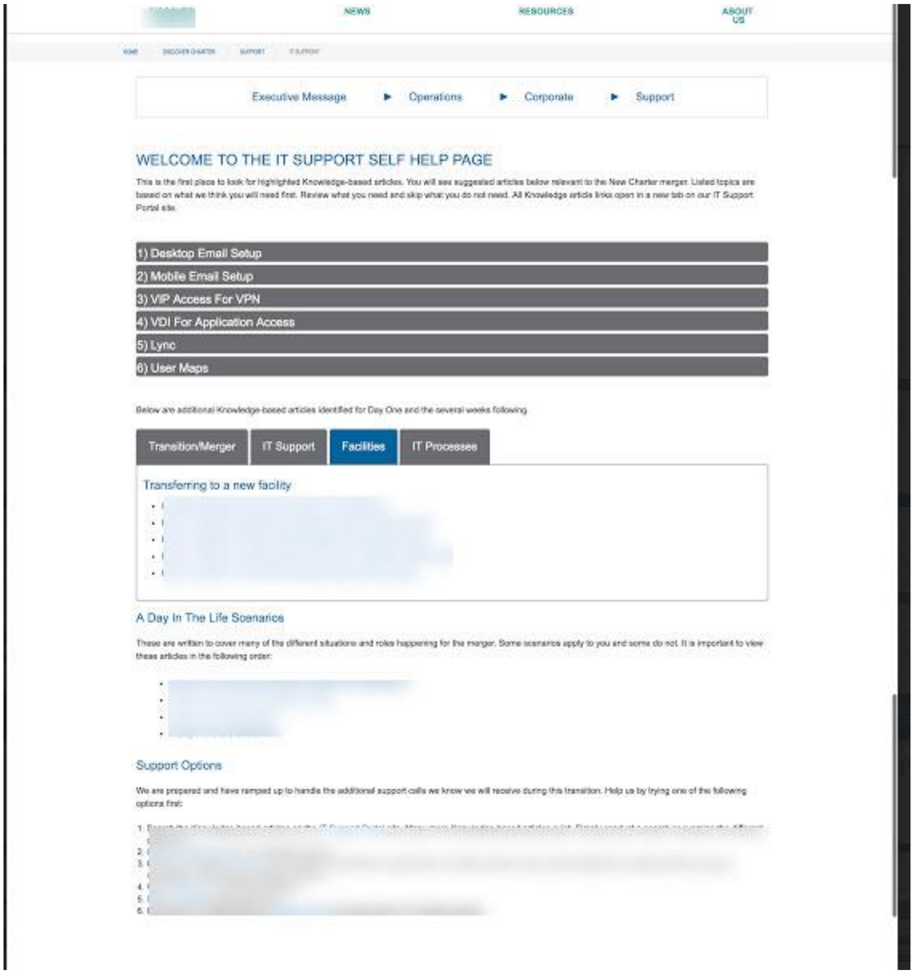
INTRANET PORTAL AND IT SUPPORT PAGE



This is the intranet portal page on the first day of the merger. There were various places for the new users to explore. There were videos from key executives to watch. The next screen shows the IT Support page. We designed it in an accordion style and suggested the logical steps to view the documentation and install the programs. We also created more than 100 Knowledge articles.



This process alone realized a highly successful experience. Of the over 100,000 users, 98% registered within the first 3 days. The Knowledge articles were so successful that the additional outsourced help desk support was never utilized!

SUMMARY

This is just a brief example of what happens during a typical project. The variables and methods of surveying, research, and implementation are always different. Continuous testing is critical. Each campaign or project is a 'living project' and needs to have constant attention. Each project or campaign is unique and there is no 'one size fits all' approach.

The customer budgeted 3 months for this project and we completed it in 2 months! Now that the merger is complete, they are now examining duplicate resources, determining the priority of the rollout expected to take 2 years and when/how they need our services again. They realize their previous use of a very expensive consulting company did not bring the value they paid for the services and we will be brought in again to complete new and different initiatives including Style Guides and best practices.