# CustomerConnect Payments

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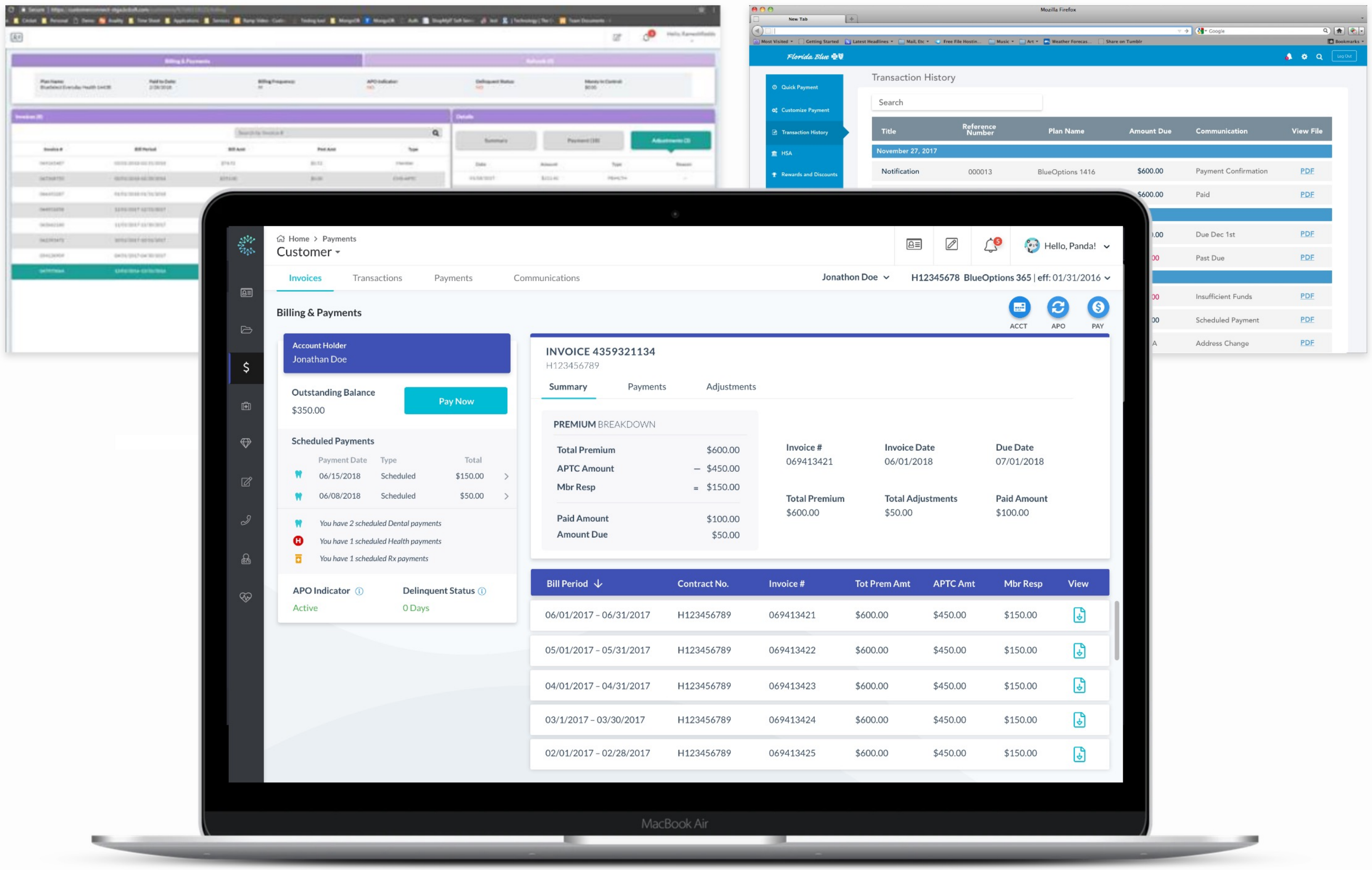
DISCOVERY

## ALL HANDS ON DECK

After the core components of CustomerConnect, our in-house callcenter CRM application were built, we began a thorough investigation of why our members were calling, which types of calls were taking longer than others and working with our business partners to prioritize enhancements to the application to reduce cost for the enterprise.

When a member calls Florida Blue, they are routed to our IVR telephony system where they self-authenticate and navigate through the automated messages and indicate why they are calling – we call this Caller Intent.

Analysis of reports indicated the three top reasons why members call Florida Blue are searching for a provider, questions about their benefits and **over 30% of calls received are for assistance with billing and payments related issues**. Further research indicated there were gaps with current Payments screen in CustomerConnect and users still needed to use multiple legacy systems to answer member phone call inquiries.



RESEARCH

## DIVIDE & CONQUER

My team and I worked with the business and organized a series of interviews with several phone advocates to identify pain points with the current system and see what gaps were present. We also did a comparison to the legacy systems they were using – BillTrust and MembersEdge.

After gathering interview notes and compiling, I set out to do side-by-side shadowing with our users while taking live phone calls to validate my research. This by far is the most valuable research method as you can see how quickly they are moving through the application and **emotionally attaches you to the work, as it involves real people** that need our assistance.

I did find some demographic analysis between the user pool and found that advocates that have been with the company longer than three years, or were initially trained with Siebel, preferred to work with legacy tools than CustomerConnect. We also have a range of varied monitor setups that advocates use, the majority having one 1920x1080 and one 1280x1024 monitors, whereas others just have one monitor.

The following year I travelled to the Florida Blue callcenters in Miami, Orlando, San Antonio and Raleigh to test this hypothesis:

1. Users tend to use what they are comfortable with, (especially when incentive bonuses depend on low Average Handle Time scores)

2. New hire training is great ( 12 weeks ), there is a training gap when we roll out new features to the business

### PAIN POINTS

- data gaps

- breakdown of invoice is confusing

- have to go to multiple places to find the info they are looking for

- missing adjustment reason

- delinquent status is the wrong color

- takes 3 days for a posted payment to reflect

### ENHANCEMENTS

- list for payment related communications

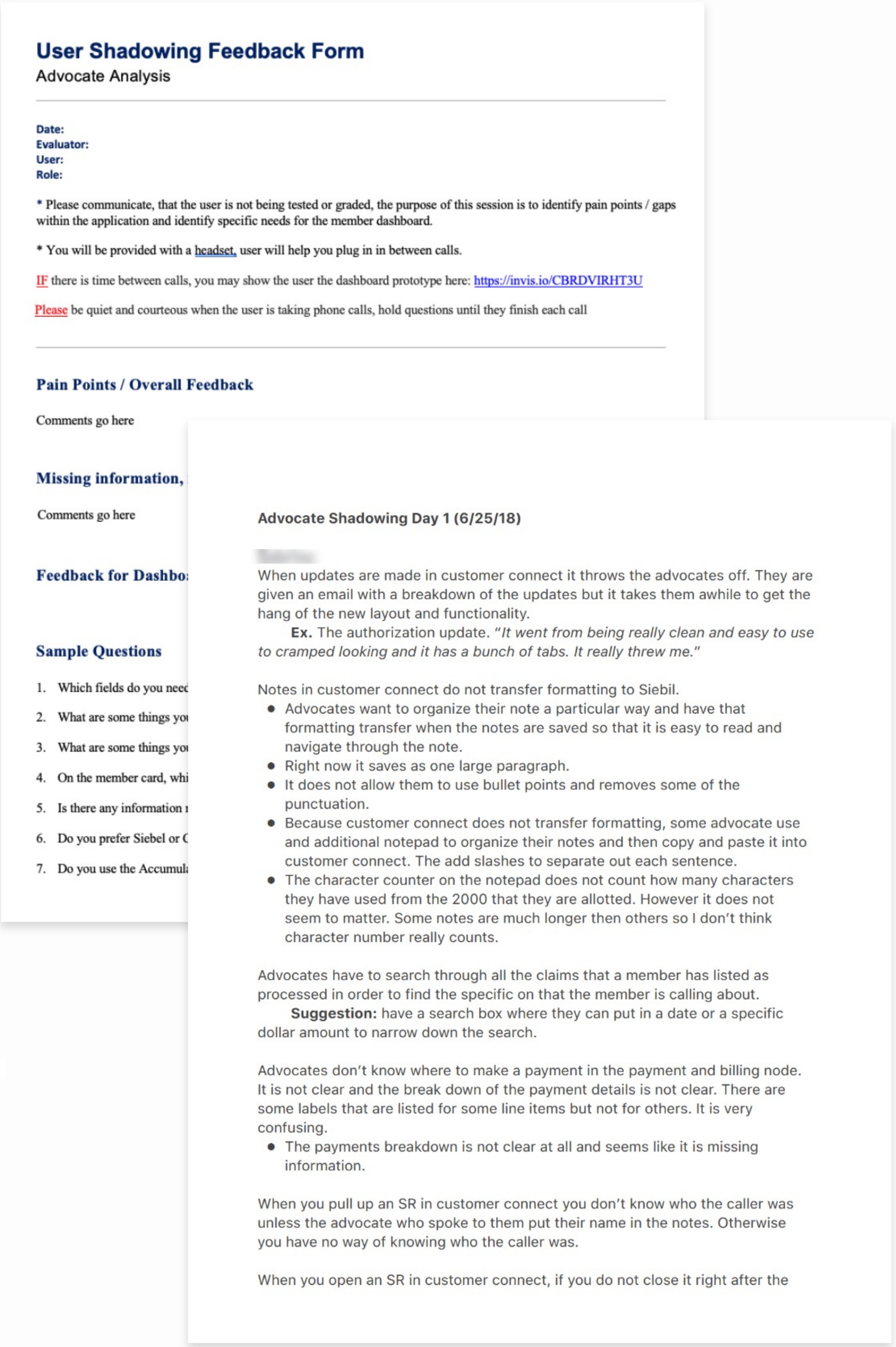
-ability to take credit card payments in tool

- counter for # of days delinquent

- ability to view Invoice

### WHAT'S WORKING

- screens are easier to read then legacy systems



**User Shadowing Feedback Form**
Advocate Analysis

**Date:**
**Evaluator:**
**User:**
**Role:**

* Please communicate, that the user is not being tested or graded, the purpose of this session is to identify pain points / gaps within the application and identify specific needs for the member dashboard.

* You will be provided with a headset, user will help you plug in in between calls.

IF there is time between calls, you may show the user the dashboard prototype here: https://invis.io/CBRDVIRHT3U

Please be quiet and courteous when the user is taking phone calls, hold questions until they finish each call

**Pain Points / Overall Feedback**

Comments go here

**Missing information,**

Comments go here

**Feedback for Dashbo**

**Sample Questions**

1. Which fields do you need
2. What are some things you
3. What are some things you
4. On the member card, whi
5. Is there any information
6. Do you prefer Siebel or C
7. Do you use the Accumula

**Advocate Shadowing Day 1 (6/25/18)**

When updates are made in customer connect it throws the advocates off. They are given an email with a breakdown of the updates but it takes them awhile to get the hang of the new layout and functionality.
**Ex.** The authorization update. *"It went from being really clean and easy to use to cramped looking and it has a bunch of tabs. It really threw me."*

Notes in customer connect do not transfer formatting to Siebil.
- Advocates want to organize their note a particular way and have that formatting transfer when the notes are saved so that it is easy to read and navigate through the note.
- Right now it saves as one large paragraph.
- It does not allow them to use bullet points and removes some of the punctuation.
- Because customer connect does not transfer formatting, some advocate use and additional notepad to organize their notes and then copy and paste it into customer connect. The add slashes to separate out each sentence.
- The character counter on the notepad does not count how many characters they have used from the 2000 that they are allotted. However it does not seem to matter. Some notes are much longer then others so I don't think character number really counts.

Advocates have to search through all the claims that a member has listed as processed in order to find the specific on that the member is calling about.
**Suggestion:** have a search box where they can put in a date or a specific dollar amount to narrow down the search.

Advocates don't know where to make a payment in the payment and billing node. It is not clear and the break down of the payment details is not clear. There are some labels that are listed for some line items but not for others. It is very confusing.
- The payments breakdown is not clear at all and seems like it is missing information.

When you pull up an SR in customer connect you don't know who the caller was unless the advocate who spoke to them put their name in the notes. Otherwise you have no way of knowing who the caller was.

When you open an SR in customer connect, if you do not close it right after the

CASE STUDY
*01*

TESTING & PROTOTYPING
## SHAPING THE FUTURE

I compiled all of the research into documents for each of the interviews, user-shadowing sessions and included screenshots of the legacy systems the advocates were using.  I made an honest attempt to organize information in a way that they were used to seeing in other systems, but with a modern approach to navigating through complex data systems at scale.

Several new features were identified and worked into the prototype, while bouncing ideas of some of the architects to ensure I wasn't designing something that would not be possible with our architecture and systems.

I created visual artifacts Adobe XD using our internal design system, and exported the assets into inVision where I created clickable prototypes to emulate the new payment experience. Next, I worked with the Customer Experience team to draft some user scenarios to be performed advocates in an interview session with the clickable prototype.

Prototyping with non-coded assets via inVision was new for the company at the time, this saved months of development time and investment dollars and became the universal approach to gathering information early in the design process without needing development resources.

We interviewed several candidates with both the old tools and this new prototype, went through a few rounds of iterations and ended up with a vision for the future, which is now in production. This exercise influenced change in the Enterprise by gaining more access to users for research, better design tools and saved hundreds of thousands of dollars into unnecessary redesigns by targeting the right enhancements to the application.

Payments