Reimagining the Customer Service Professionals Info Management Application Experience

Our Client wanted to create a seamless healthcare service experience for members, by improving communication and information management across member touchpoints. They sought our expertise in understanding and documenting the current state of their Customer Service Professionals' (CSPs) challenges, motivations, and opportunities to create a more seamless experience across systems. They also wanted to understand members' experiences when connecting with CSPs in order to gain insights of both perspectives.

A Design Thinking or Human-Centered Design methodology was used to facilitate project activities that resulted in new insights. The insights were used to reimagine the information management application experience, as well as define training and the set of key performance indicators necessary to set the CSP team up for success. Subsequent project efforts included the creation of application wireframes that were validated with CSPs and eventually used in the application development process.

Phase 1 – Assessing the Org and Identifying the Opportunity

Pre-Discovery Assessment

The Lean Geeks team met with organizational leaders to understand their expectations and goals for the project. Key stakeholders and team members were also engaged to share their perspectives on team needs and challenges. We used this information to frame interviews, namely, where to probe deeply or to understand the opportunities for improvement that exist.

Significant challenges from the lens of the Customer Service Professionals were gathered. CSPs recognized their inability to deliver a high-quality member experience. In many cases, answering member questions required the use of 15+ web & desktop applications with disparate and disconnected member data. Applications timed out during use causing CSP and member frustration with call delays. These systems were their primary source of frustration and the biggest opportunity to innovate.

Discovery

The Lean Geeks team conducted in-depth, semi-structured interviews with the CSPs to do a deep dive into specific system challenges, data needs, as well as org and cultural challenges that impacted their ability to fulfill a member's request for information or assistance in a timely and accurate fashion. Similarly, the Lean Geeks team recruited and conducted semi-structured interviews with individuals that fit the member demographic. Insights from these interviews validated the alignment of needs and expectations from the CSP perspective. Alignment of needs and expectations allowed Lean Geeks to document those aspects of the system and processes that would be delightful to CSPs and members alike.

Opportunity identification

The Lean Geeks team organized the interview and observational insights into a prioritized list of requirements and recommendations that included:

- Key components of a CSP application. It included a prioritized list of features. Application capabilities to support CSPs ability to share opportunities to maximize benefits with members surfaced as an innovative opportunity
- Training and resources for CSPs necessary to reduce new hire attrition and increase promotion

Next phase:
Definition and Design

The Lean Geeks team proposed a process that involved a high level of collaboration and validation with the end users of this system, which in this case, are Customer Service Representatives (CSPs). The proposal also included engaging members that CSPs serve. This ensured that the processes and systems created not only worked for the end user, but also supported the ability to delight the customers they served.

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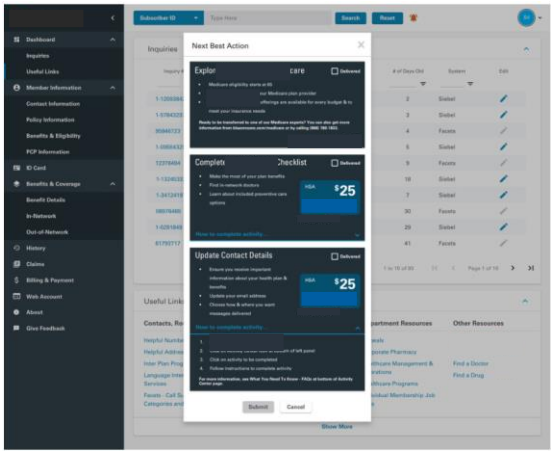
Phase 2 – Definition and Design

Definition

The Lean Geeks team facilitated internal team meetings and used insights and requirements coming out of the Discovery activities to frame the conversations. These cross-functional collaborative sessions resulted in opportunity statements. Opportunity statements articulated what the product team is enabling the customer to do and included the real customer experience outcome. These opportunity statements helped to define the mission and scope of work. This framing helped focus and organize the design and development teams, among others.

These newly framed opportunity statements were subsequently validated, in an effort to refine the statements themselves and their priorities.



Design

Concept development activities led by the Lean Geeks team helped define application page types and where key application capabilities live based on user mental models and their workflows.
Two members of the Lean Geeks design team, with expertise in interaction design and content strategy were embedded within the team for several years as members of the Client's Agile Scrum team. During that time, they designed the page level details and interaction and design patterns for the application. The Lean Geeks researcher who conducted the initial interviews served as an on-going advisor as the work progressed.
Design artifacts, such as a user interface (UI) components and the style library were also developed.
The project resulted in an application that was co-created with end users (i.e., CSPs) and considered the technical capabilities of their computer systems, as well as their workflow and the overall goals of providing members with accurate information in a timely fashion.

The Lean Geeks team followed a staff augmentation model in the execution and implementation of design artifacts. These two individuals served as badge-issued contractors on the Client team. This engagement model created continuity from the outsourced discovery, definition, and concept design activities to the Agile development activities performed by the Client team.