

Case Management UXD Report

Test Owner: Suzy Jones

Stakeholders: DFO & CCG

Project Name: Case Management

Goal: UAT Observations

Customer Segment: 8 Different CSR & 5 Different Roles

Region: Atlanta, GA

Request Date: August 2023

Target Complete Date: September 2023



What are we testing?

We tested the overall navigation within Case Management from the home screen to a Case Management page. We wanted to understand if the structure of the site would naturally guide the CSR to where they needed to go and if we had provided the correct fields for the CSRs to be able to create a case and shepherd it through until the case was resolved.

Who's the audience?

Our scope was narrow and focused on CSRs located in Atlanta

Number of participants

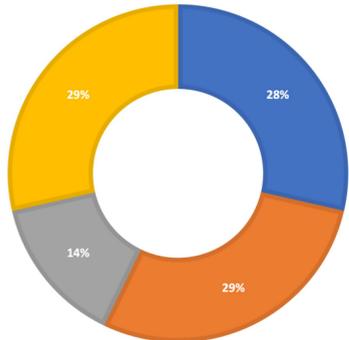
- 8 Participants
- UAT
- Various Departments

Participant's Departments

- VAS
- Production
- General CS
- NFP Safety
- RGA

Tenure

- 2 Years or Less
- 5 Years
- 10 Years
- 15 Years or More



What are the UAT comments and expressed needs during side by sides?

The UAT was a success as users were able complete the majority of questions successfully. Watching UAT testing and reactions and comments from the testers on the experience creates a future backlog of work. The team also captured further information on CSR needs in various roles for how Case Management could help with complex customer needs outside of “where is my stuff?”.

Number of Case Management Questions

5

Hours of interviews

16

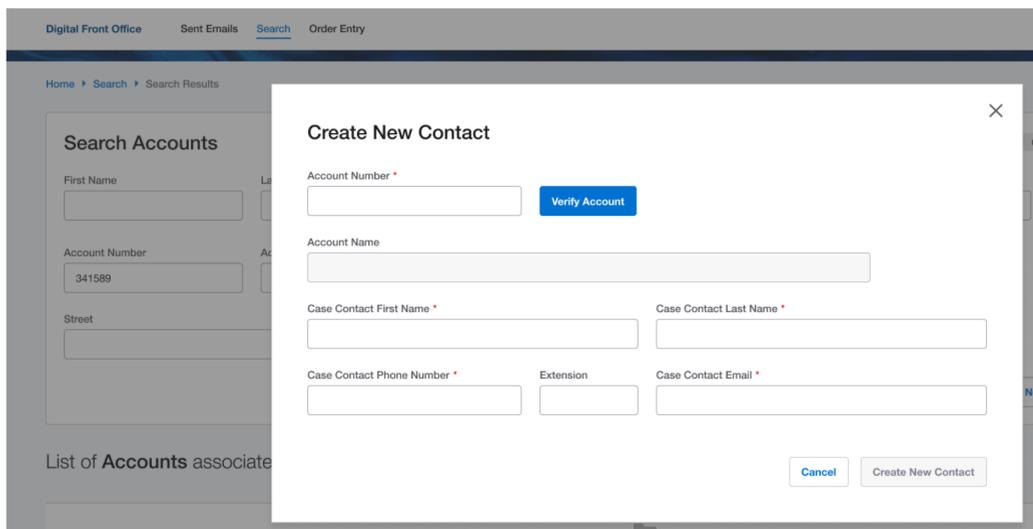
Dashboard Needs

Feedback:

- 1 Loading Results: the “Cancel Search” is barely visible, it does not display long enough to read or even select the option.
- 2 “Create New Contact” modal when entering criteria to search, then pressing “enter” does not work to begin search, as it requires you to click on “Verify Account” to begin search.
- 3 Tab feature also does not work within the “Create New Contact” modal. Extension number field within mainframe currently allows 5 digit (character spaces)
- 4 Users should have the ability to view case history of a case being updated or created. This option isn't available and will be helpful if we lose the information and need to go back. There should be an option from CM dashboard to view more than 10 lines at a time (see: Account Search).

Result:

Success



Possible Solutions

- 1 How may we help the user to know to select “verify account” first?
- 2 Base instructions for first steps or hints if the user enters further information below Verify Account button
- 3 Hint text within the extension box
- 4 Need the ability to search by creator of the case.

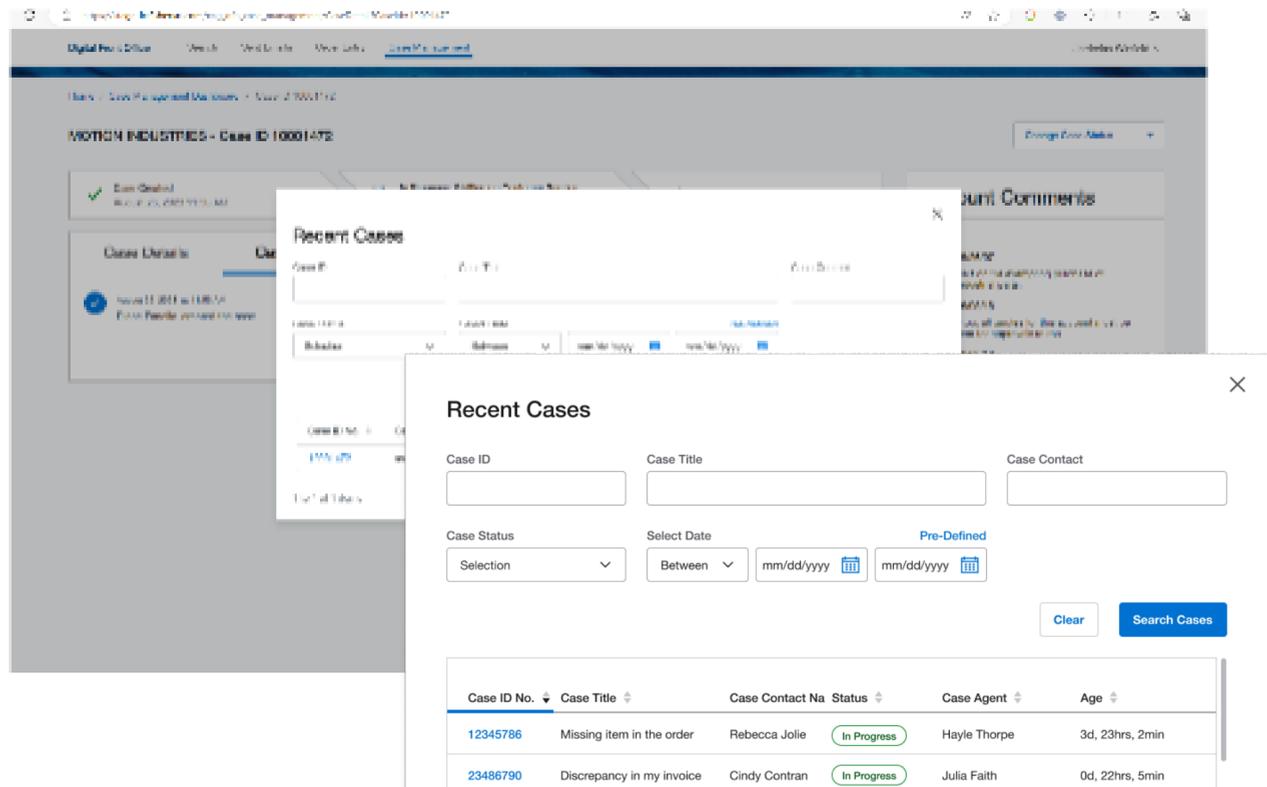
Recent Cases Results

Feedback:

- 1 If NO Recent Cases exist, then message should be displayed stating "No Recent Cases Found". The wording on the error banner needs to be updated.
- 2 Identify the channel or specialty team next to case agent.
- 3 Recent Cases Model to show 10 cases on screen without scrolling.

Result:

Success



Possible Solutions

- 1 "No Recent Cases Found" needs to be the message if no cases have been found
- 2 Team identification

Case ID No.	Case Title	Case Contact Na	Status	Case Agent	Age
12345786	Missing item in the order	Rebecca Jolie	In Progress	Hayle Thorpe	3d, 23hrs, 2min
23486790	Discrepancy in my invoice	Cindy Contran	In Progress	Julia Faith	0d, 22hrs, 5min
- 3 If number of recent cases exceed 10 look into pagination to avoid complications on a modal screen.

Case History

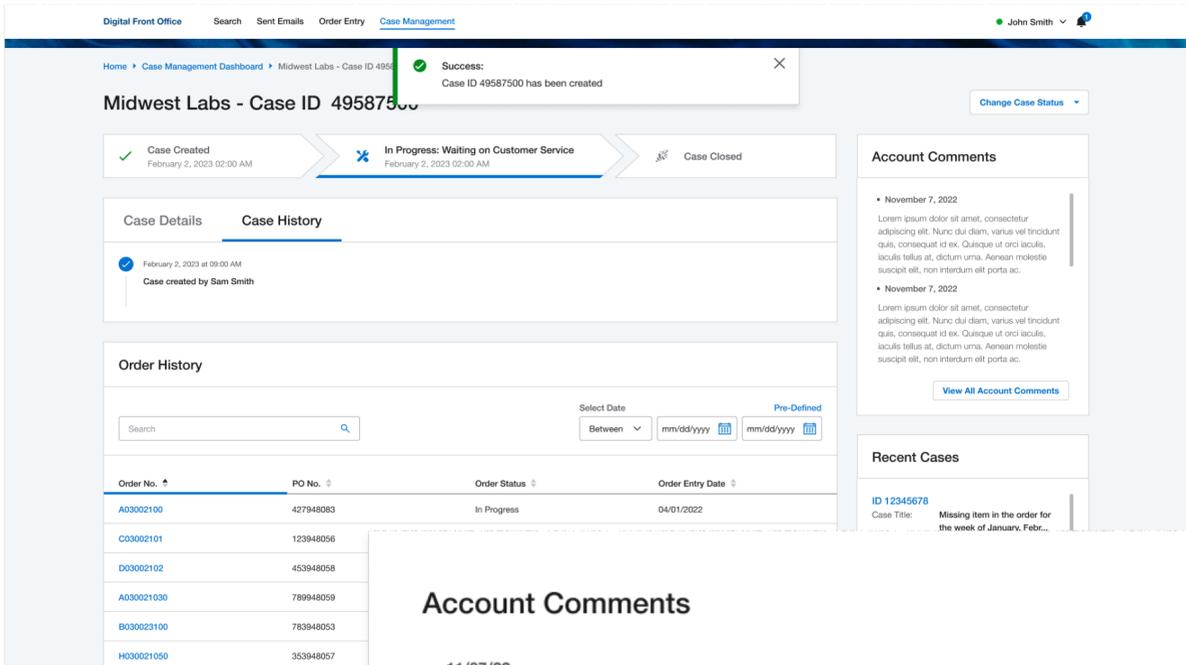
Feedback:

1 Pop up displays too fast, add a few more seconds to allow time to read.

Banner display time – check this as some banners were a flash on the screen and the banner itself was unreadable; example Banner for credit hold (also coloring of red would help for important items)

2 Account Comments which pop up in the account search are harder to read (All uppercase and no spacing) than the account comments added in the upper right corner of the case detail page. Should these be more consistent? (Possible filter by date would be a benefit as well.)

Result: Success



Possible Solutions

1 Adjust timing of pop-ups and toaster from 6 seconds to 8 seconds and review with the team.



2 Best practices have comments and notes broken out in a structured format. All caps is not user friendly and the white background makes text more legible.

Create a New Case

Feedback:

- 1** Description Field: Suggestion: add character count, displaying how many characters are left, also give option to add more notes if needed (some cases are more complex than others).
- 2** When user clicks on reply to email in Genesys it opens up DFO again to contact search, interrupting the Users action in replying to the email because of the new tab that is unnecessary.
- 3** Case ID field in Genesys needs to have a title, it appears as just a search box for our directory and it will be missed.

Result: Success

Create New Case ✕

Case Contact Details

Case Contact Name: George White
 Case Contact Email: george.white@midwestlabs.com
 Case Contact Phone Number: (213)-567-9087
 Account Number: 341589-008
 Account Name: Midwest Labs

Case Related Details

Priority

Normal Critical

Case Title *

Order Number

PO Number

Invoice Number

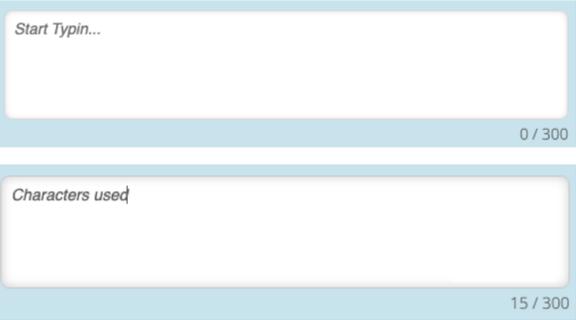
Catalog Number

Description *

Cancel Create Case

Possible Solutions

- 1** Add character count to text fields
- 2** Triggers in Genesys to open DFO contact search being looked into
- 3** Need to look into Genesys capabilities?



Case Details

Feedback:

1 Add a column to include a paperclip to easily identify which cases include attachments

2 Give an option to add a hyperlink to insert as part of comment.

Result: Success

Midwest Labs - Case ID 49587500 Change Case Status Exit Case

✓ Case Created
February 2, 2023 02:00 PM

✗ In Progress: Waiting on Warehouse
February 2, 2023 02:47 PM

✕ Case Closed

Account Comments

- 11/07/22
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc dui diam, varius vel tincidunt quis, consequat id ex. Quisque ut orci iaculis, iaculis tellus at, dictum urna. Aenean molestie suscipit elit, non interdum elit porta ac.
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Case Details Case History

Missing Yellow Raincoat in the Order Normal Critical

Date Created:	February 2, 2023 09:00 AM	Account No:	341589-001
Created by:	Sam Smith	Account Name:	Midwest Labs
Case Contact Name:	George White	Order No:	A03002100
Case Contact Phone Number:	(314)-567-9087	Invoice No:	7436128
Case Contact Email:	george.white@midwest.com	PO No:	427948083
		Catalog No:	3B3928

Description:
Lorem ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make. Lorem ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer.

Attachments

Attachments (5)

results.txt <small>24 MB February 2, 2023 at 09:00 AM by Sam Smith</small>	Remove
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results.txt <small>24 MB February 2, 2023 at 09:00 AM by Sam Smith</small>	Remove

+ Add Attachments

Case Comments (12)

Add

Sam Smith February 2, 2023 at 09:00 AM
Customer email indicated there was a missing rain jacket in his order. I'm looking for a missing product in the order received.

Sam Smith February 2, 2023 at 09:00 AM
Lorem ipsum dolor sit amet consectetur. Ipsum donec felis consequat pretium amet malesuada elit commodo netus. Faucibus elementum ultricies dolor.

Sam Smith February 2, 2023 at 09:00 AM
Lorem ipsum dolor sit amet consectetur. Ipsum donec felis consequat pretium amet malesuada elit commodo netus. Faucibus elementum ultricies dolor.

Possible Solutions

1 Paper clip is in the design to be included

Attachments (5)

results.txt <small>24 MB February 2, 2023 at 09:00 AM by Sam Smith</small>	Remove
results.txt <small>24 MB February 2, 2023 at 09:00 AM by Sam Smith</small>	Remove

2 Hyperlinks would be great to use for fishersci.com pages and other web references.

Case Comments (12)

Add

Sam Smith February 2, 2023 at 09:00 AM
Customer email indicated there was a missing rain jacket in his order. I'm looking for a missing product in the order received.

Case Details Continued

Feedback:

- 1 When we exceed the file size it doesn't go back to display the files that we have selected to be uploaded. It makes us start all over. What should happen is that it gives us the error, then displays the “items pending upload” with error, and should include the file size next to each one and “deselect” option to upload again instead of starting all over.
- 2 When entering search criteria, pressing “enter” does not begin search, you to have to click on “Search Cases” to begin search. Tab feature also does not work.
- 3 Allow original user that created comments to be able to edit comments (Notice: allow only the original user that created the comment to edit said comment)

Result: Success

Possible Solutions

- 1 Have clear size limitations with the “Add Attachments box” Give alternatives?
- 2 Have a clear action to start the search and allow the user to tab through the screen
- 3 If the creator of a comment has logged into history, allow only them or their supervisor to make edits to the comment

What is Case Management

“Process Improvement”

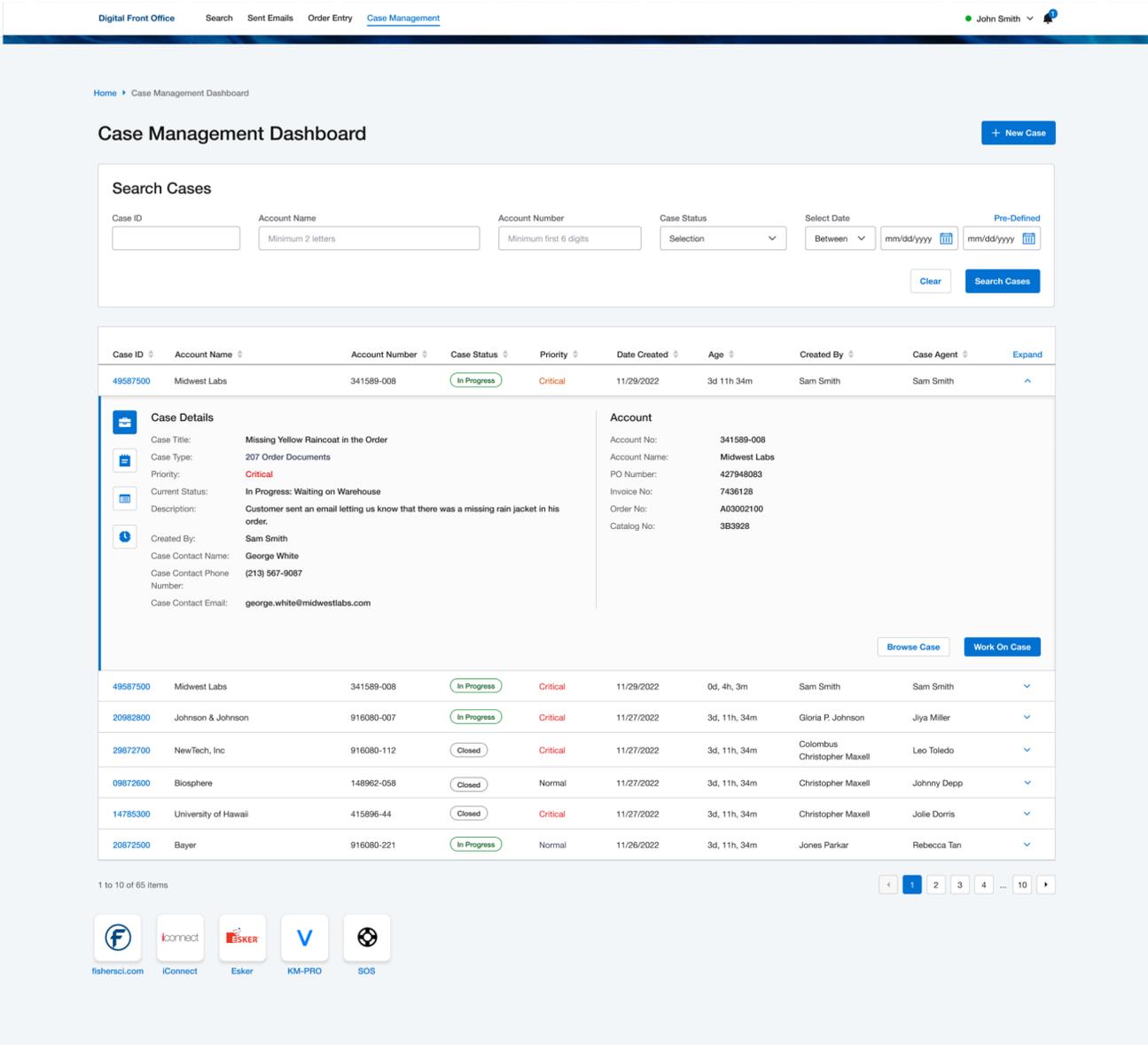
Key findings:

Case Management should make it easy to find anything, like finding information by case number. “We need to even find customer complaints, even re-bills need case numbers.”

RGAs within Case management will be easier to keep up with and keep the customer informed.

We need a single source of truth on a case to help with communication between Fisher Scientific teams. Currently little conversation between the teams occurs. Often a case takes 10 day on average to receive information from the freight team, then they lose visibility on the case. A Customer Service Representative will have to reach back out and gain traction on the case. This hurts our image with the customer and makes them question our competence.

Future of Case Management CSR Needs



Possible Solutions

- 1 Keep everyone involved on the case
 - Customer Service
 - Freight
 - Warehouse
 - Quality Assurance
 - Sales
 - Etc.
- 2 How might we use Case Management to keep track of needs regarding product and service needs?
- 3 Prevent lack of visibility on a case where all involved may have “read” access but only key personas have “write” access.

Case Management Notes

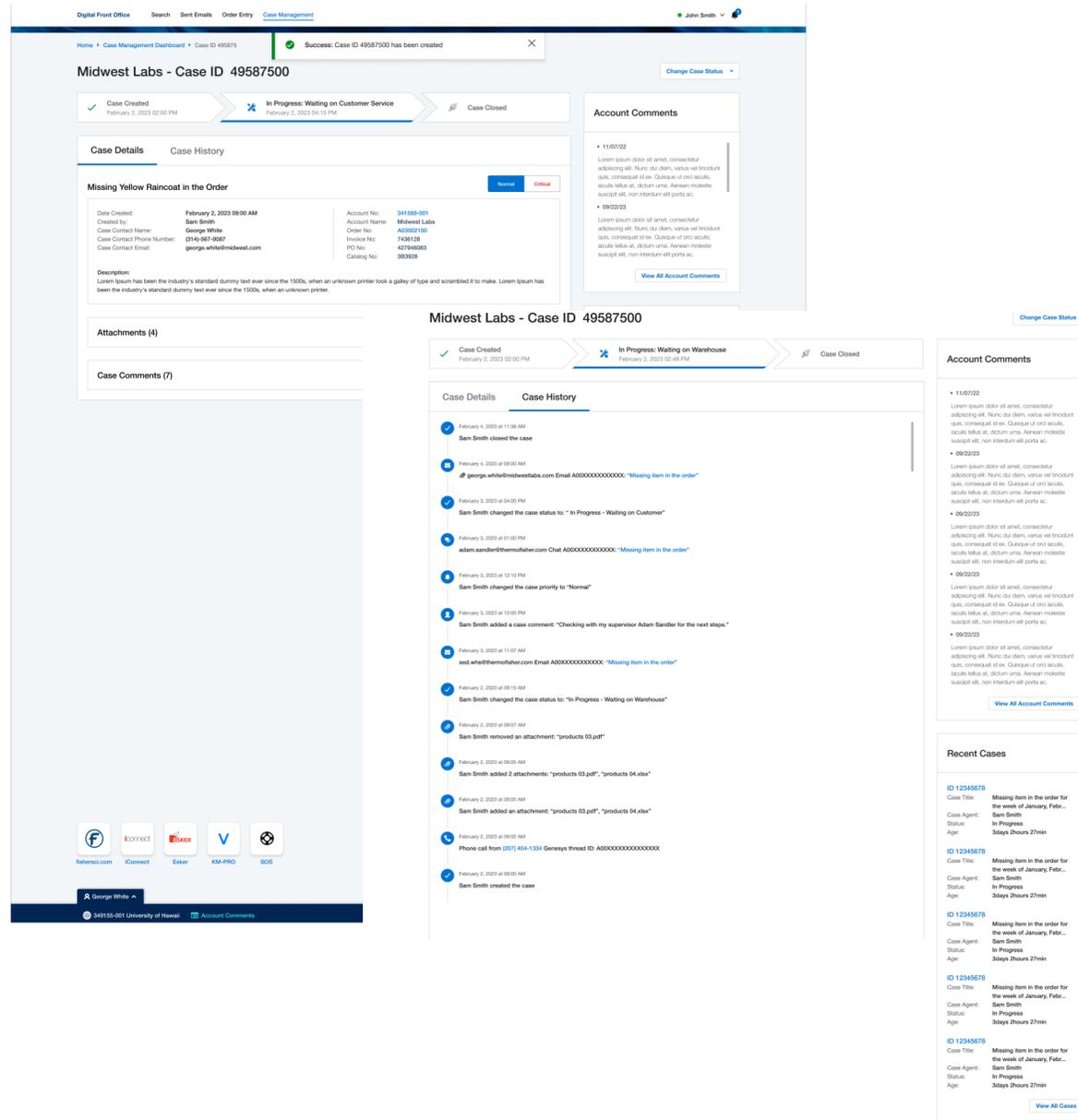
“I need to be able to review notes on an RGA in a centralized location, especially when the paper trail spreads across multiple roles in the company.”

Key findings:

To help with communications, we have Customer service place detailed notes in DFO, then double check that the notes have been moved to mainframe, and can pull up email threads to review chain of discussion. All while being aware that no notes leave Genesys.

Notes go in several different screens, so sometimes info gets lost (DFO, Mainframe, Genesys). A Customer Service Rep will copy Genesys notes into DFO manually to have them all in one place.

Future of Case Management CSR Needs



Possible Solutions

- 1 See all linked details to the case in one location
 - Order Notes
 - CSRs involved on the case
 - Opportunity to advise type of notes needed
- 2 How might the fields be different depending on the type of case that is being presented?
- 3 Date of the case creation and age of the case is great. How will all the future touch points be captured?
- 4 How might the fields of data change as the case possibly grows in complexity?

Workflows, Less Silos

Notes go in several different screens, so sometimes info gets lost (DFO, Mainframe, Genesys).

Key findings:

Vendors will often provide case number in the account notes, so any CSR may work the case later. The case number is listed in free-form within account notes.

If the Vendor was unable to give a case number, the Vendor staff member's name, number, and email must be captured.

Needs better ability to speak with freight team. As the current process allows things fall through the cracks too easily.

Silos with our teams at work and software need to start feeling centralized.

Possible Solutions

- 1** With RGA flows and fields being developed, how might we adapt and have fields to address items such as Vendor's case number?
- 2** How might we alert the right departments of a need for review of a case created in Case Management?
- 3** How easy can we make a case's details, email with pictures, tracking information, and other data to send to vendors?
- 4** The opportunity for cases to not be forgotten and a clear location for all departments to engage in a more holistic way.

Attachment Capabilities

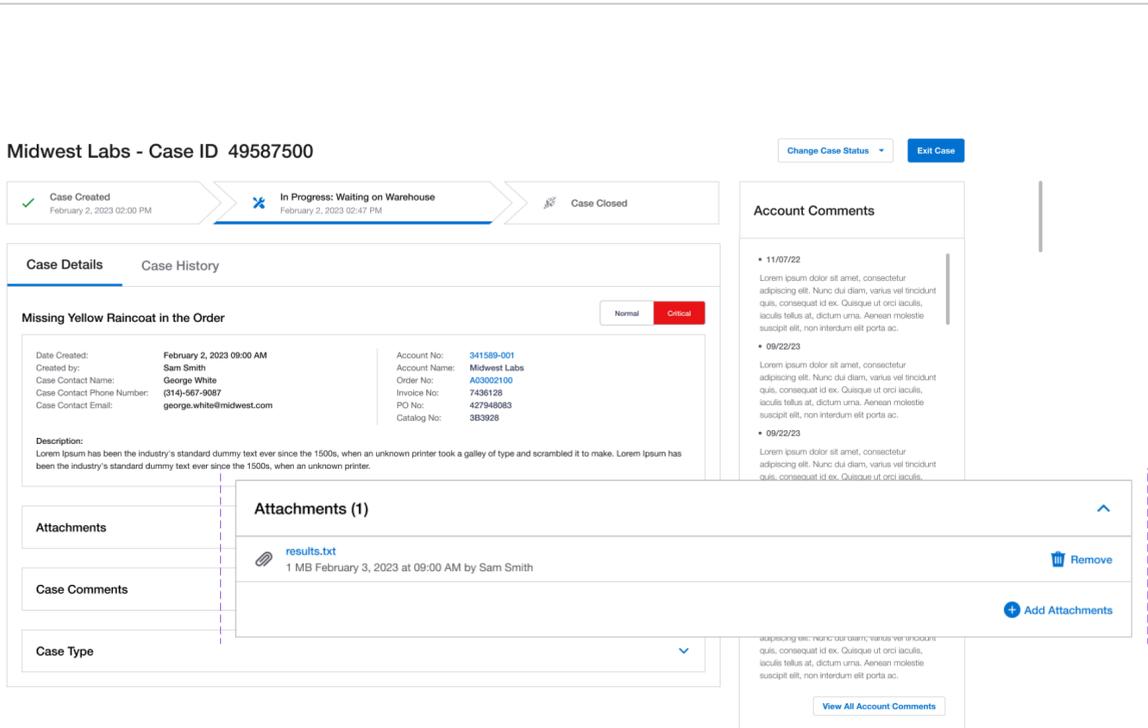
Key CSR roles rely on individuals with extreme due diligence capabilities.

Key findings:

Customer photos are used to find FedEx tracking numbers and make note of that tracking # in RGA notes. A CSR then sends an email to Freight Claims dept. to ask them to process a FedEx claim on the damaged package.

Credit Memo docs, return authorization from supplies, decontamination forms, and invoices (right amount/right account) all need to be attachable in an easy way.

Case Management CSR Needs



Possible Solutions

- 1 How might we help process improvement to stop repeat problems like being aware of SCAR reports. Could we know about not only repeat customer needs but vendor needs as well?
- 2 How would other teams get the key pieces of information needed for their part of the case and not be overwhelmed with data in the system?
- 3 What key images, hyperlinks, forms, and other attachments need to be requested from the user?

Timing Problems

“RGA is a lot of backpedaling to see what’s the whole story here.” - the RGA took place over two interview sessions due to complexity.

Key findings:

RGA cases can pop back up years later, so a case # should stick on an email forever. No time limit on when a case # should fall off.

Even after sending the customer the info, the ticket doesn’t move until the item is returned. But after 30-60 days the RGA drops off the ticket.

Stop counting weekend and holiday time against suspended ticket time which hurts CSR teams score. (If stakeholders are concerned about response time on tickets, an opportunity exists to have a chatbot respond outside of work hours so the customer knows what the status of the response is and provides an escalation option if needed [reaching out to the sales contact])

Case Management CSR Needs

The screenshot displays the Case Management Dashboard. At the top, there are navigation links for Digital Front Office, Search, Sent Emails, Order Entry, and Case Management. The user is logged in as John Smith. The dashboard includes a 'New Case' button and a search section with filters for Case ID, Account Name, Account Number, Case Status, and Date. Below the search section is a table of cases with columns for Case ID, Account Name, Account Number, Case Status, Priority, Date Created, Age, Created By, and Case Agent. The first case is expanded to show details:

Case ID	Account Name	Account Number	Case Status	Priority	Date Created	Age	Created By	Case Agent	Expand
49587500	Midwest Labs	341589-008	In Progress	Critical	11/29/2022	3d 11h 34m	Sam Smith	Sam Smith	Expand
20982800	Johnson & Johnson	916080-007	In Progress	Critical	11/27/2022	3d, 11h, 34m	Gloria P. Johnson	Jiya Miller	Expand
29872700	NewTech, Inc	916080-112	Closed	Critical	11/27/2022	3d, 11h, 34m	Columbus Christopher Maxwell	Leo Toledo	Expand
09872600	Biosphere	148962-058	Closed	Normal	11/27/2022	3d, 11h, 34m	Christopher Maxwell	Johnny Depp	Expand
14785300	University of Hawaii	415896-44	Closed	Critical	11/27/2022	3d, 11h, 34m	Christopher Maxwell	Jolie Dorris	Expand
20872500	Bayer	916080-221	In Progress	Normal	11/26/2022	3d, 11h, 34m	Jones Parkar	Rebecca Tan	Expand

The expanded case details for 49587500 include:

- Case Title:** Missing Yellow Raincoat in the Order
- Case Type:** 207 Order Documents
- Priority:** Critical
- Current Status:** In Progress: Waiting on Warehouse
- Description:** Customer sent an email letting us know that there was a missing rain jacket in his order.
- Created By:** Sam Smith
- Case Contact Name:** George White
- Case Contact Phone Number:** (213) 567-9087
- Case Contact Email:** george.white@midwestlabs.com

The account details for 341589-008 include:

- Account No:** 341589-008
- Account Name:** Midwest Labs
- PO Number:** 427948083
- Invoice No:** 7436126
- Order No:** A03002100
- Catalog No:** 3B3928

At the bottom of the dashboard, there are navigation controls showing 1 to 10 of 65 items and a row of partner logos: fisherai.com, iConnect, Esker, KM-PRO, and SOS.

Possible Solutions

- 1 Alerts in the right intervals to the right team members that a case is still open in Case Management.
- 2 When is the right time to archive a case or finding the right type of solution to close a case out
- 3 How might we make the data in OnDemand easier to retrieve and within DFO and not “another” system.