

Achieve Service

South Ribble Borough Council

Summary of Contextual evaluation for Achieve service's desktop application.

All Personas and technical details have been omitted.

Reception

Job Description:

- Logging complaints and queries, issuing tickets
- Initial point of contact with the user
- Can have long queues

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- Likes the layout and all 3 buttons, reception, face to face and phone team. Simple layout.
- Most of the front desk staff gets rotated so they are good at using all 3 areas of Achieve Service.
- Quick switch from one section to another using the top drop down menu.
- Ticket issue is really quick. Lots of tickets issues in 3-4 sec.
- Select Enquiry type, add name and issue ticket.
- Good use of full screen layout.

Mostly used Menu Items:

CSA & Search to find customers while the CSA button was used to make the switch.

Face to Face

Process designed:

- 1) Find Customer
- 2) Select Enquiry
- 3) Process Enquiry

Process as communicated by an experienced employee: Who contacts us, how and why?

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- Raise new case is engaging. We can add 123 as steps to indicate the process and convey its simplicity.
- Telephone field in customer record is mandatory so at times one has to copy it from mobile to telephone. Nagging and cumbersome but i think it is their internal process check.
- The face2face employee had several windows open she had to make use of other complementary software like customer lookups to check records and cross reference. It would be good if we could provide these as part of our software.

- **Process Enquiry:**

- Search box below the category boxes was never used as they never went below the screen. Shows that some people don't like to scroll when they are doing a quick customer check. They never felt the need to do that search and were comfortable in using the browse method. It also shows that if the trainer misses out on certain areas then employees would never explore or learn about them on their own.

The lady then called her colleague and told her about the search as well. She also mentioned that there was an instance when finding the right category for an item was difficult and search could have solved that problem. If only they knew it existed.

Example: Finding the correct category for Tiger bags was a problem they had.

- Of all the face to face and telephone employees none of them have used the Contact Finder & FAQ's button sitting at the bottom. Some didn't know it existed, they didn't know what it did and even when they tried using it. It didn't work. Best to take it out.
- Logical Process: The green bar on top depicting all the steps involved starting from finding the customer first, then enquiry type and process

enquiry. Everyone agreed that these steps were logical and that the customer name would come up automatically.

- Number of results per page should be allowed to increase. More than 20. At times they have lengthy lists.
- Introduce a field called preferred contact and be able to choose from landline and mobile options.
- **The Green bar on top:** is not user friendly as white text on light green is not readable. No one understood the purpose of rest of the items.

Case: The client name on the green bar was not enough as they have to go back to check for the address or if they had doubts about the right client selection they had no way of confirming the client's address once they have moved forward.

So additional client info like the address on top along side the name would be welcomed.

Separate the client info from the steps as it is hard to read and understand as to what it stands for.

- Card Payments don't take data through perhaps because it takes to a 3rd party independent app not integrated with firmstep.

- All Face to Face and Reception employees used only CSA to make the switch. Search is mostly used from within the main content area as this is where they work most and do not like to look elsewhere for search options or even taking the mouse outside their focus area.
- Search Issues: Street address and then name. Most employees didn't know if they could conduct a search on street address and name. No one told them and the search did not give much help either. They only used address.
- Using street search and then first name would bring up lots of abbreviations and one letter name which are not ordered/ sorted properly.
- Search useful. Case Reference Number is missing. Should search on customers and organisations.
- **Phone Team:** Home button never used. Instead CSA is used to switch. Wonder if all three options are out there always so people don't even have to wait for CSA drop down.
- Home Page: Reception or phone team rarely uses the stats box. Although they find it useful but have their monitor screens to keep an eye on such stats.

Menu with 3 iconic services is the best and then CSA.

Case:

Frequently used menu items and buttons

Some buttons are used more than others. Like, Save Button, Submit button and other frequently used buttons were found to be placed in the middle with two seldom used buttons on either side. It would be helpful to bring it out in the open to give easy access to the most sought after buttons.

Face to Face:

Left Docking Tabs:

[Learn more](#) and [Customer](#) were the two widely used tabs from the docking tabs. It would be good to place customer information right in front to gain quick and easy access.

Case:

Process: Call the ticket (name of the person that is there on the screen from reception) and searching for the name. Spelling mistakes could also be considered like auto correct or suggestions. Click throughs to look at case details.

If you are looking for a lodge on station rd then you cannot find that. Second parameter is missing. Station Rd with Lodge, Home Name or Postcode is missing. As a result you end up getting alot of search results with smallest numbers going at the bottom.

- Numeric results listed at the bottom with highest first. Sorting could be better.

Phone Team

- 1) Menu Items used: CSA
- 2) Never used Search Enquiry
- 3) The green bar depicting process from customer finder to process enquiry is good. Logical to have customer first and then to enquiry.
- 4) Left Docking Tabs: Mostly used for payments to gain access to Customer and Learn More (populating content).
- 5) White text on green bar not readable.
- 6) Customer info in a small box somewhere more obvious would help.
- 7) Menu Items not used by the Phone team: Cautionary Contact (never used) and Admin Options (wouldn't touch)
- 8) Satisfaction Survey: Pop up at the end of the process. Never going to use it.
- 9) Update and Create are mostly used buttons
- 10) For Council Tax and Benefits: **CTRN** is the most important search item. When you do a search on CTRN and then clicking on the number you can go to Firmstep. This CTRN number lookup and integration is important for all council and benefits queries. This could also make the firmstep software more customised and better suited to all Council Tax and Benefits tasks.
- 11) Not able to save edits to customer profile while in query mode. If you are trying to add or update a telephone number then you have to come out of the customer

profile view and then go through a different route. Update only works on customer details page. Hence most numbers never get updated.

- 12) **Button Position:** While searching for addresses you get a long list of address and when you select one and try to submit you have to scroll all the way down to use “submit” one can do with another set placed on top.

Side Note: we can also have it like twitter or linked in with small short cut links with each entry or appearing only when an entry is selected.

- 13) **Most frequently used Buttons:** SUBMIT button for enquiry submission process and NEXT button for Customer Details are the most frequently used but hidden within a set of rarely used buttons.

- 14) **Cannot relate to Icons:** Icons appearing within a customer record search have no meaning to the employees working on the system. They never bothered to know about them don't know why the circle is sometimes orange or gray. (They tried to find out the purpose and realised that hovering would show the titles so they knew that the coloured circles stood for new records, cautionary contact etc which according to them had no importance to them.) Next the date of birth and SS Account icons were difficult to recognise.

- 15) Icons added to the clutter. Needed the **Address to Stand out** a bit more as that is what their eyes are searching for.

16) Some more *Green Bar* Feedback:

Customer name is important, Service Enquiry type and Enquiry Process less important. Did i click on the right address? Is he the right guy this question stays with them when they move to this screen and would like the address to appear close to the name.

Working memory requirement need to be addressed.

Observations and Findings

Train the Trainer

According to some employees components on Achieve Service that never got used was because their trainer didn't show them or tell them so it would be a good idea to train the trainer in the way we want our product to be used.

Building Custom Modules

Customizing menus and quick links along with providing some cross reference apps based on a particular departments requirements like the front office, forms designer and the back office all have different needs and if we can fine tune our software we could add value to our product and make it all the more difficult for anyone to produce another competing product in future. Search button at the bottom is overlooked completely, left hand docking tabs were mostly to gather customer information. Would be good to have it in from of them because these types of docking menus are used to store seldom used or reference menus like Learn more etc.

Use of Icons

If we are using icons then we must use them with supporting text.

Achieve Forms

South Ribble Borough Council

Menu Items used

- 1) Admin Options: Only used for testing purposes and never used apart from that
- 2) Task List is a good option for Back office department. Not much use to the forms designer.
- 3) Mostly used menu item:

 “Browse forms”
 It is the form designer home page. Form designer can check on all pending tasks and see whose working on what.

 Second most sought after menu link is the “Create new form”.
- 4) Likes the simple form designer layout. Likes folder structure. Perhaps working as a developer likes all technical icons and presentations. Tree views, folder structures etc.
- 5) Icons appearing on the browse page have no meaning to the form designer. Tries to find out what they mean as there is no text next to these icons.
- 6) Like right clicks and context menus.

Observation:

liked all the technical icons and representations.

Needed more feedback to cover all sections and areas of Achieve forms.