



CX17

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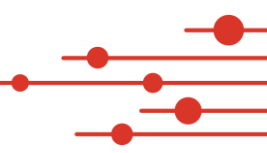


# Omnichannel User Experience (UX) Design: What's in your toolbox?

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# EXPERIENCE

# User Experience (UX)



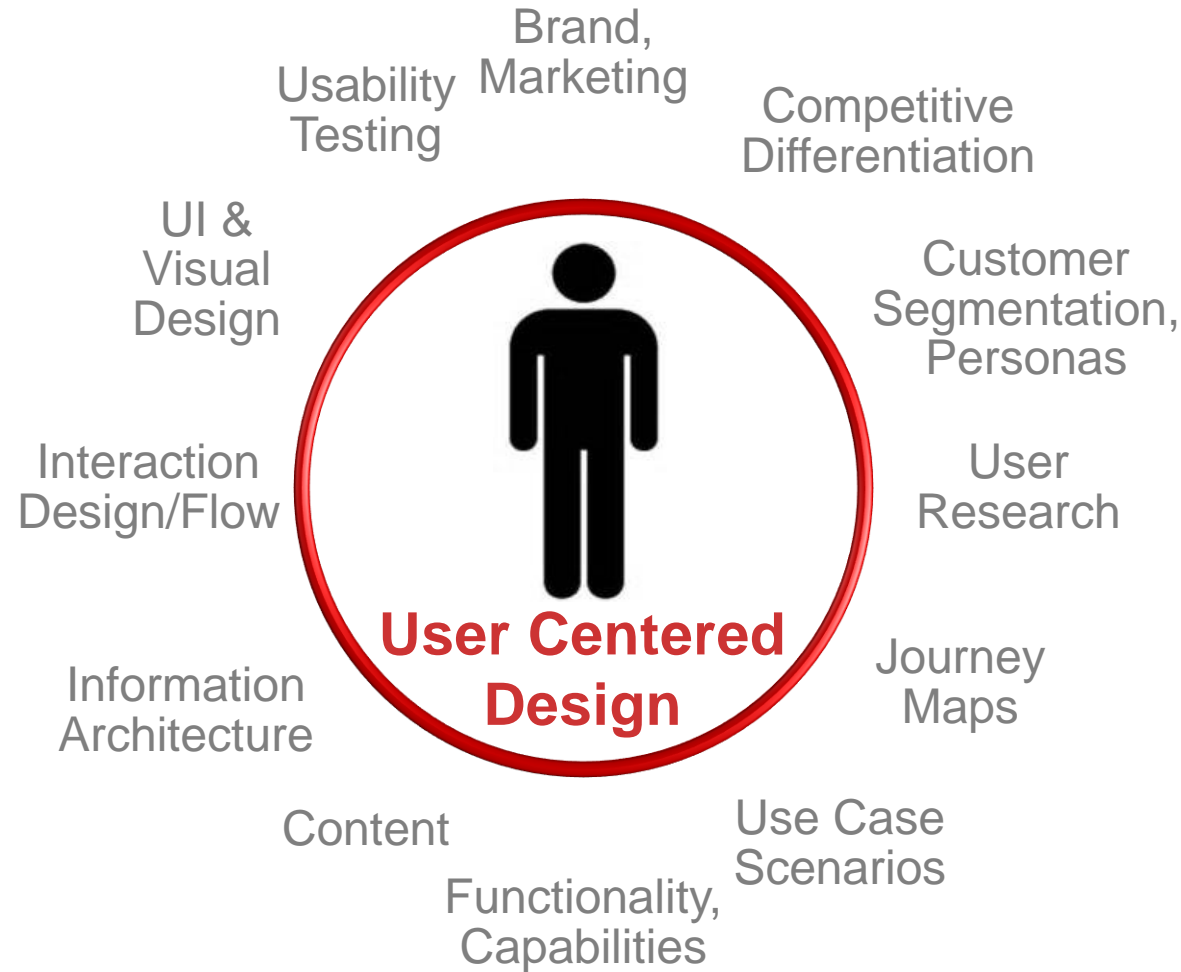
The experience that users (customers, agents, managers, etc.) have interacting with your products and services that are **useful and usable, meaningful and memorable** from the user's perspective.

# User Experience (UX) Design



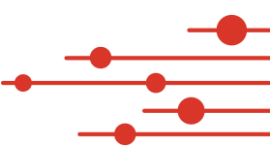
## Intentional Design...

...from the  
**Outside → In**



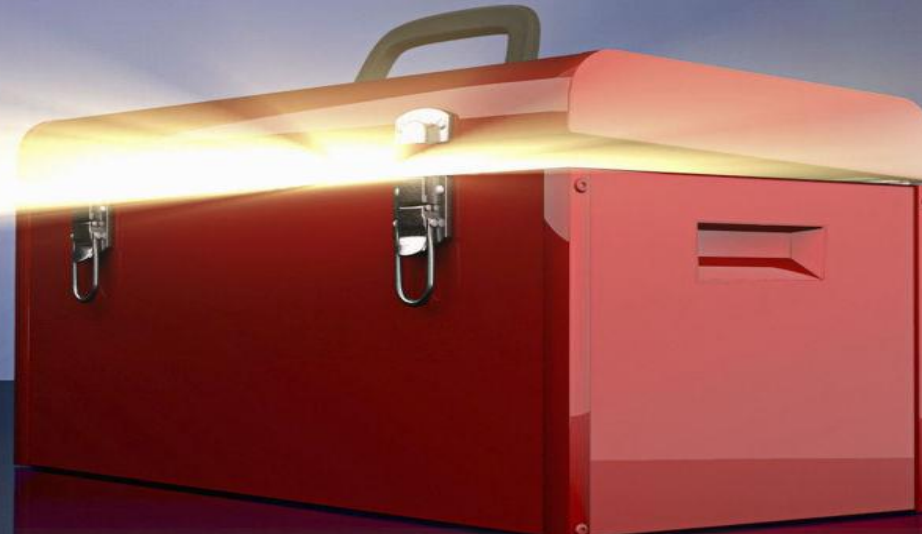
...and from the  
**Inside → Out**





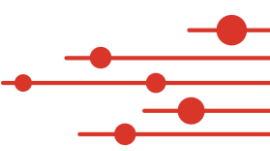
# What's in your UX Design Toolbox?

- Persona
- Journey Map
- User Story
- Card Sorting
- Wireframe
- In Your Own Words



PRACTICE TOGETHER:  
Design the user experience of a Genesys CX17 attendee

# Persona



NAME: Sally Worth



Company/Industry: High Tech

Title: EVP of Marketing

Personal Facts: Married, 2 children. From Toronto, Canada.

Quote: "I need to figure out ways of better attracting

A fictional profile of a type of user or customer segment that represents their shared attributes, interests and needs.

## Attributes:

Frequent Global Traveler

'Digital Migrant' (but not afraid to adopt new technology when it serves a purpose)

Works remotely from home and manages a worldwide team

Likes to get up early so she has 'quiet time' to concentrate on work before the family wakes up

## Channels of Preference:

Mobile - Text

Mobile - Email

Mobile - Chat

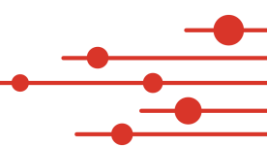
Web - Chat

Video conference

Voice Calls - to resolve issues

- Helps design from customer/user perspective.
- Persona should be realistic; not 'perfect.'
- Gather data and observations based on real users/customers 'in action.'
- Consider Persona's channel preferences.

# Persona – Practice Together

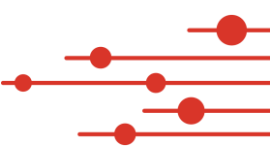


NAME:		AGE:		Genesys	
<div>Insert Image</div>		Company/Industry: _____			
		Title: _____			
		Personal Facts: _____			
		Quote: _____			
Attributes:		Channels of Preference:			
_____		_____			
_____		_____			
_____		_____			
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- Briefly interview a partner. (5 minutes)
- Based on your partner's information, create a Persona of a **Genesys CX17 attendee**.
- Write key attributes on the Persona template.
- Ask about channel preferences.
- Be prepared to share.



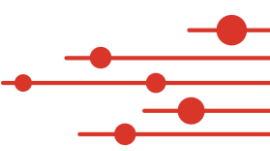
# Journey Map



A structured visualization of the user's service experience—touchpoints of interactions and emotions across time while pursuing their desired goal.

- Current vs. Future Journey
- Holistic sequence of interrelated interactions
- Tasks ↔ Channels (self-service vs. human touch)
- Omnichannel Gaps (wrong channel, no context)
- Customer Effort (useful, usable)
- 'Moments that Matter' (meaningful, memorable)

# User Story



User Story / Use Case  
<Descriptive Title>

*As a <type of user>,*

*(if/when <optional condition>)*

*I want/need to <goal/desired task>*

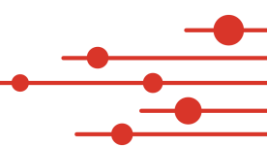
*so that <benefit/reason>.*

A method for capturing user-based requirements. Each story focuses on a type of user and their experience in a specific scenario in which they interact with the product/services.

- Story describes Who, What and Why; not How.
- 1 story per card. Brainstorm, sort, prioritize.
- Journey = 'Epic'; a Touchpoint = 'Sub-story'
- <If/When> condition helps connect interactions.
- Additional requirements noted on back of card.

Reference: *UserStories Applied* by Mike Cohn

# User Story – Examples



## User Story – Epic Example Genesys CX17 Attendee

*As a VP of Customer Experience (CX),  
if I travel to a conference,  
I want to attend Genesys CX17  
so I can find out about the latest CX trends and innovation.*

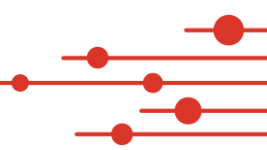
Reference: User Stories Applied by Mike Cohn

## User Story – Sub-story Example Genesys CX17 Attendee

*As a VP of Customer Experience (CX),  
while I'm at the Genesys CX17 event,  
I want a mobile app that allows me to easily  
locate other Genesys customers in my industry,  
so we can share ideas and best practices.*

Reference: User Stories Applied by Mike Cohn

# User Story – Practice Together



User Story / Use Case  
<Descriptive Title>

*As a <type of user>,*

*(if/when <optional condition>)*

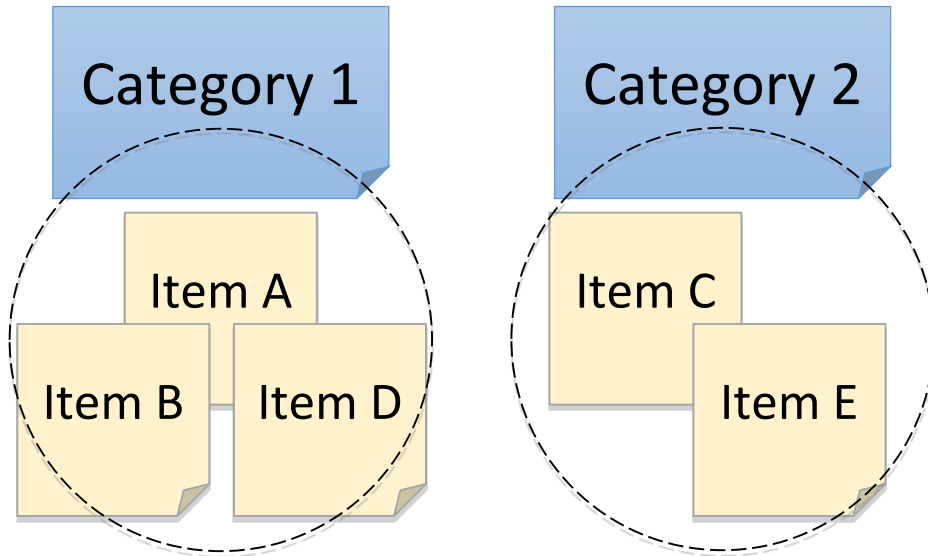
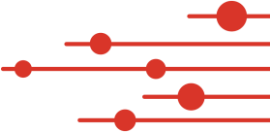
*I want/need to <goal/desired task>*

*so that <benefit/reason>.*

Reference: *UserStories Applied* by Mike Cohn

- Collaborate with your partner. (5 minutes)
- Write 2 User Stories (1 Epic, 1 Sub-story) representing your Persona's desired experience **attending Genesys CX17**.
- Be prepared to share.

# Card Sorting



A collaborative design technique for brainstorming, classifying, and categorizing ideas or items.

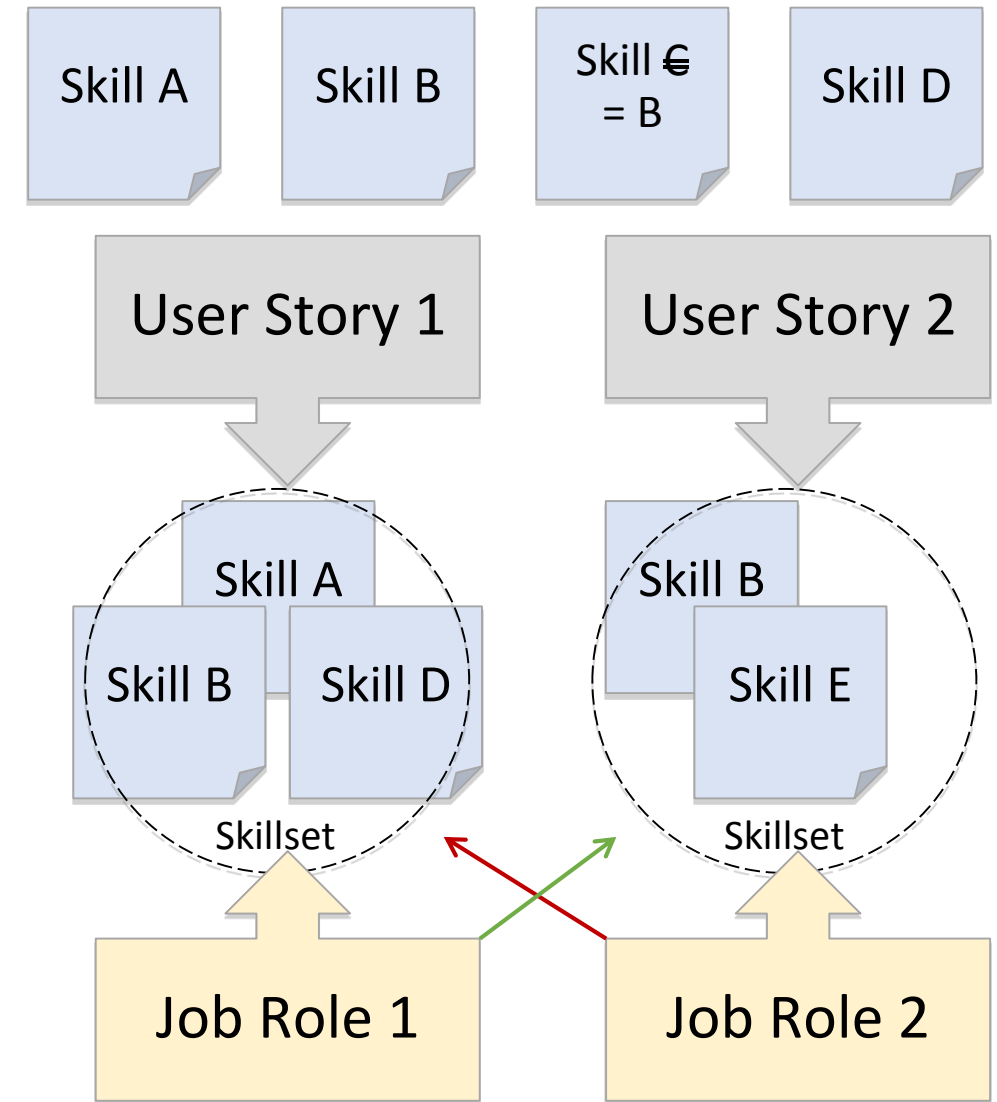
- Rapidly brainstorm ideas (1 item per card)
- Create an intuitive classification system (name each, combine/eliminate duplicates).
- Group similar items into sets.
- Name each category.
- Useful for: IVR menus, Web/Mobile app information architecture, Routing skills, etc.



# Card Sorting – Example

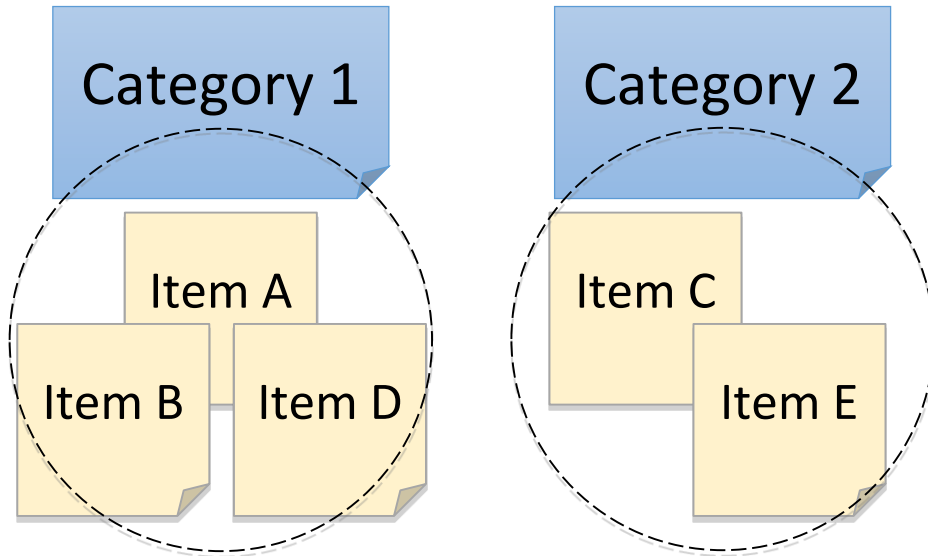
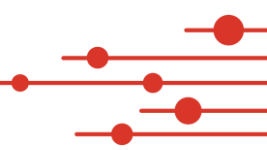
## Align User Stories, Routing Skills, and Job Roles:

- What skills do your staff have or need to know?
- Write 1 skill per card.
  - Eliminate/Combine/Divide skills (as needed).
- Map User Stories to Skills (skillsets needed).
- Identify additional skills needed (skill gaps).
- Align skillsets to Job Roles / teams.
- Decide on minimum skills needed for overflow situations.
- Identify job roles/teams to provide backup, specifying 'borrow/lend' conditions (dynamic routing target expansion).



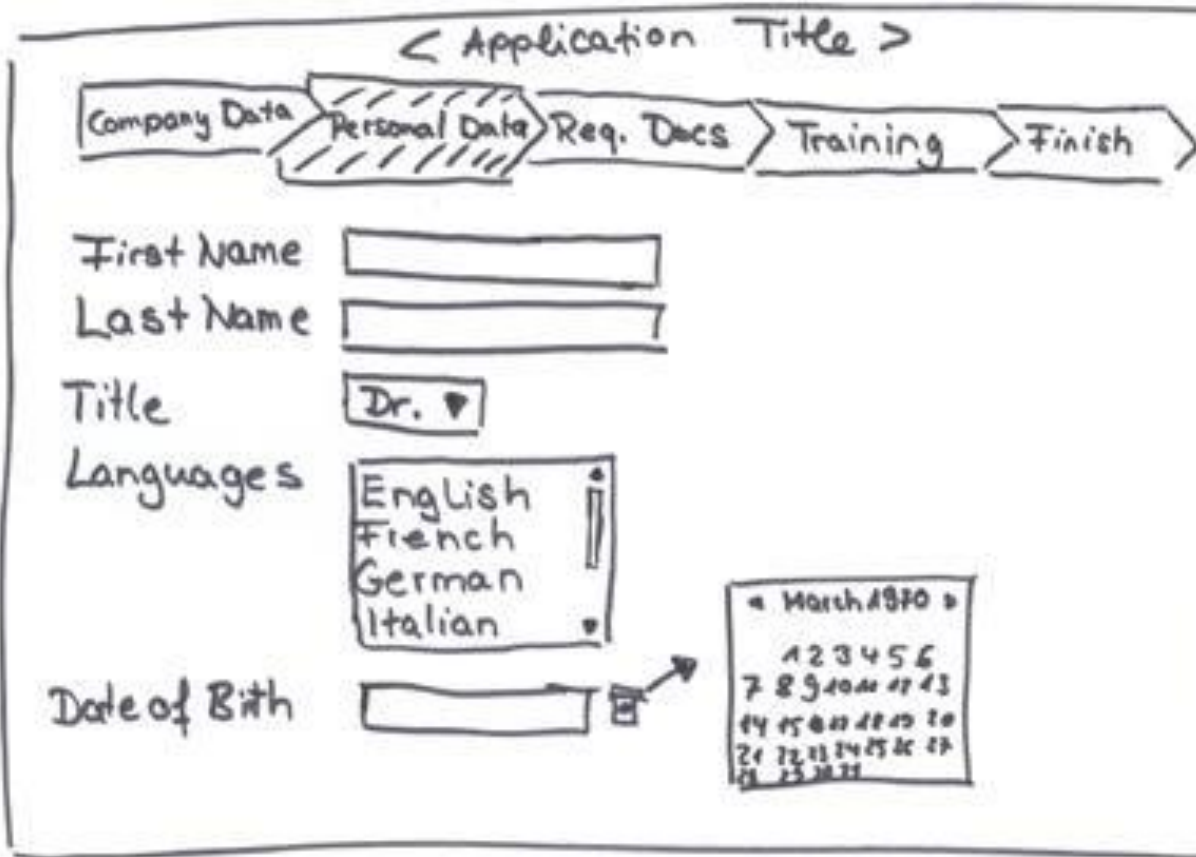


# Card Sorting – Practice Together



- Work in small groups (4-8 people) (10 minutes)
- Use Card Sorting technique to ideate an **'FAQ' App for Genesys CX17 attendees.**
  - Brainstorm FAQ topics (write 1 per card).
  - Group similar topics into sets.
  - Name each category (menu list within app).
- Be prepared to share.

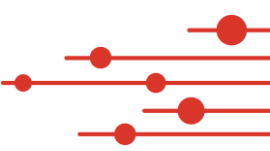
# Wireframe



A 'low-fidelity' drawing or early mockup representing skeletal framework of a UI, IVR call flow, web or mobile app, agent desktop, reporting, stick-figure 'Storyboard,' or other functionality.

- Useful for uncovering additional requirements and considerations early in design lifecycle.
- Focus on what UI does, not what it looks like.

# 'In Your Own Words'



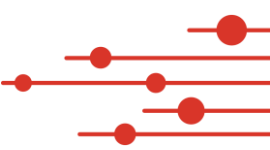
"The insurance member's responsible for \$30 in Coinsurance."

"For this service, your insurance program covers 80%.  
You're responsible for paying 20%, which in this case is \$30."

A User Research technique to create, clarify, and validate user-intuitive language used in IVR/Web/Mobile apps, documentation, agent scripting.

- Have real users participate in User Research.
- Write on card a complex/difficult message that may need to be conveyed to user during UX.
- Have user read it out loud. Then have user paraphrase in their own words what it means.
- Consider rewording due to confusion, jargon, complexity, unnaturalness, etc.

# Key Takeaways



- The **right tools** enable you to deliver the **right User Experience**:
  - ✓ Persona
  - ✓ User Story
  - ✓ Wireframe
  - ✓ Journey Map
  - ✓ Card Sorting
  - ✓ In Your Own Words
- UX Design is less a strict process, and more a **user-centered** mindset.
- Focus on **‘Moments that Matter’** to users.
- Design holistically across entire Journey; avoid **‘Omnichannel Gaps’**.
- **Call to Action:**
  - Use one of these UX Design tools within the next month!



# Thank you!

