BVE RESEARCH

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OBJECTIVE

Improve Primary Manager's experience in MyAccount BVE Portal

APPROACH

6 INTERVIEWS WITH

DEFINE

- Customer journey
- Touch points

IDENTIFY

- Pain points
- Opportunities

PIVOT

James Banks, On-boarding
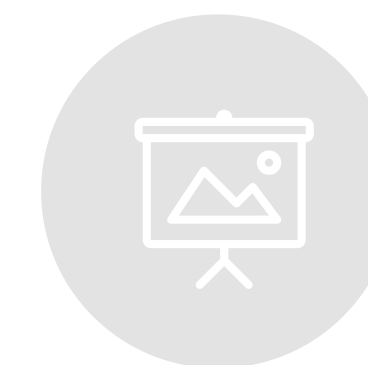Specialist, Service Assurance

Care

Kenyatta Watkins,
Operations Support

Operations

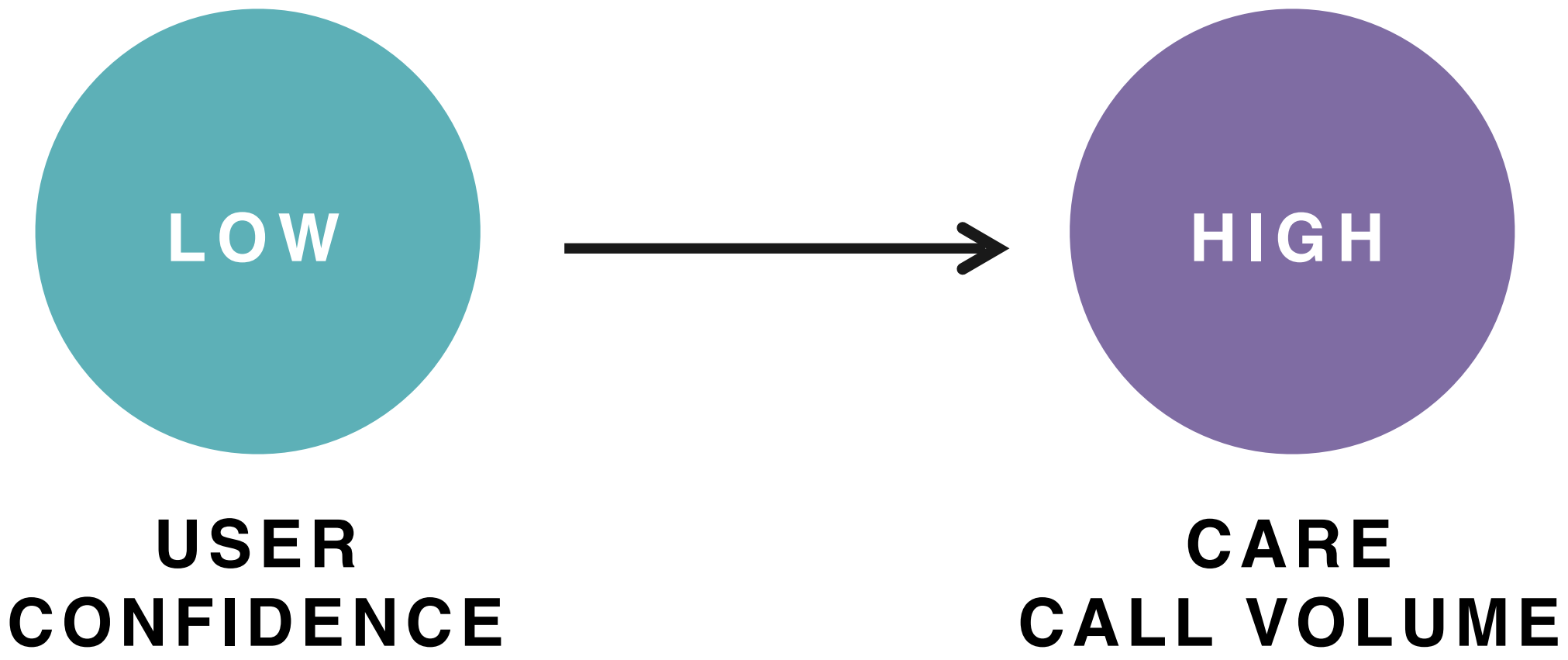Griffin Lee, Sr. Analyst
Process Effectiveness

Business Services

Charra Baker, CPM

RESEARCH HIGHLIGHTS

KEY INSIGHT

Customers **lack confidence** when using MyAccount BVE portal even at critical steps and rely heavily on Customer Service & Care to fill in the gaps.

LOW

HIGH

USER CONFIDENCE

CARE CALL VOLUME

LOW CUSTOMER CONFIDENCE

TROUBLE UNDERSTANDING THEIR OWN NEEDS

Some customers know what they want from a phone system, but can't explain it.
Some customers don't know what they want until they see it in action.

WHERE TO FIND HELP

Support portals, PDFs, videos, support phone calls, webinars, multiple agents.
Customers may not know who to rely on, and some see care calls as the only
way to interface with BVE

UNSURE OF NEXT STEPS

Activating the portal, Ensuring call flow is working as desired, Configuring users
and features, DOI, Training sessions

FEATURE USAGE

"Most customers use only 5% of the features BVE offers." - Care Rep

"Technical questions are all over, but 4 main questions are about Voicemail notification, Be Anywhere app, Push to talk, Call Flow" - PIVOT agent

| CORE FEATURES	TOP FEATURES	BOTTOM 10
• User Management • Call Flow • Voicemail • Hunt Groups • Automated Attendant • Call Forwarding • Call Queues • Shared Call Appearances	• **Voicemail** • **BeAnywhere** • **Busy Lamp Field** • Music on Hold • Call Transfer • Barge-in Exempt • Call Waiting • Push-to-talk • Alternate Numbers	• Automatic Hold/Retrieve (43) • Sequential Ring (381) • Call Notify (262) • Selective Call Acceptance (40) • Anonymous Call Rejection (4399) • Call Park (3553) • Caller ID Blocking Override (1) • Hoteling (800) • Remote Office (1118) *P.E. Report Dec 2018*

LEGACY vs MyAccount BVE PORTAL

"The Legacy portal is more intuitive and quicker whereas My Account portal customers don't know where to begin because they're apprehensive. " - PIVOT Trainer
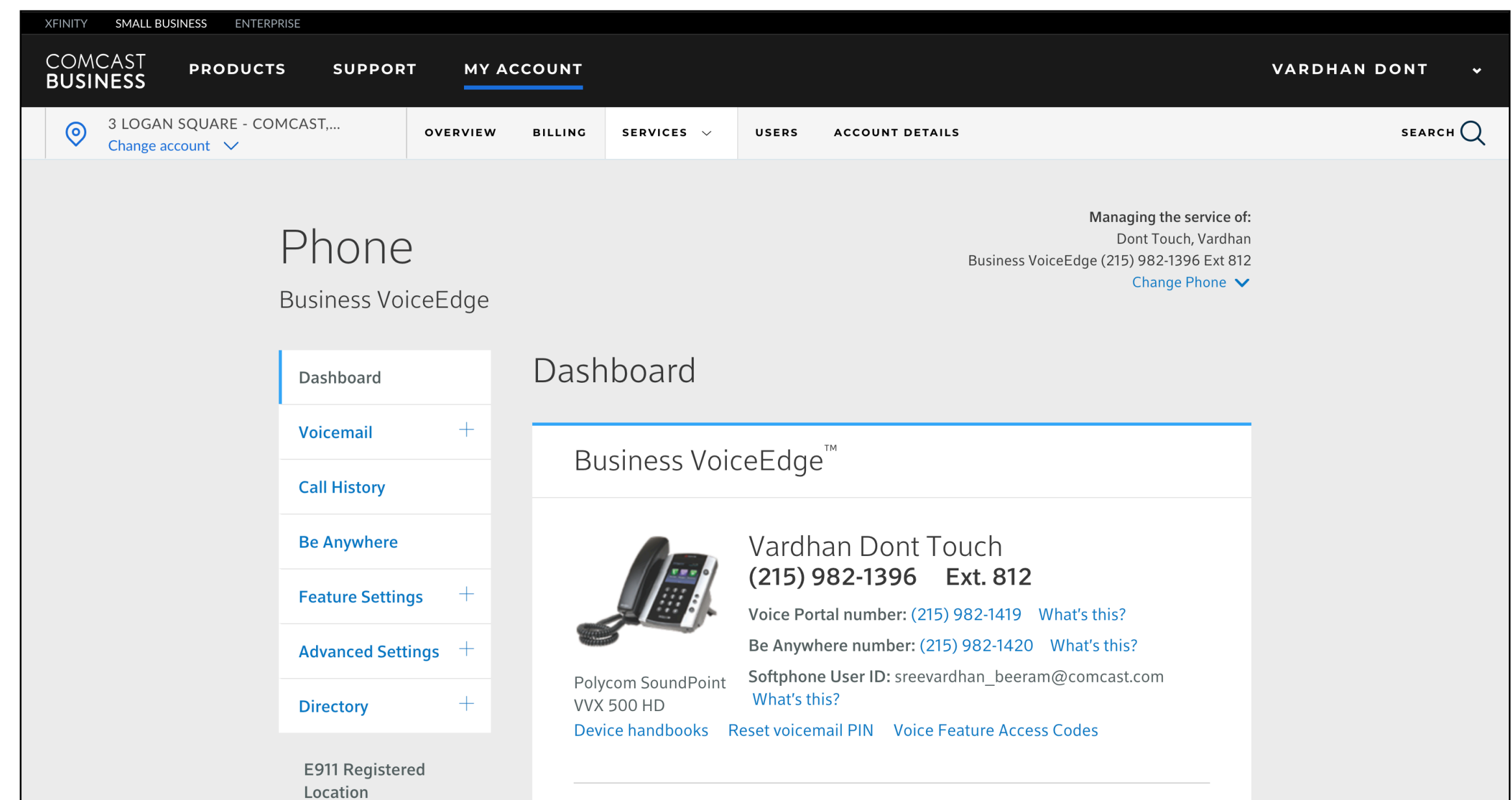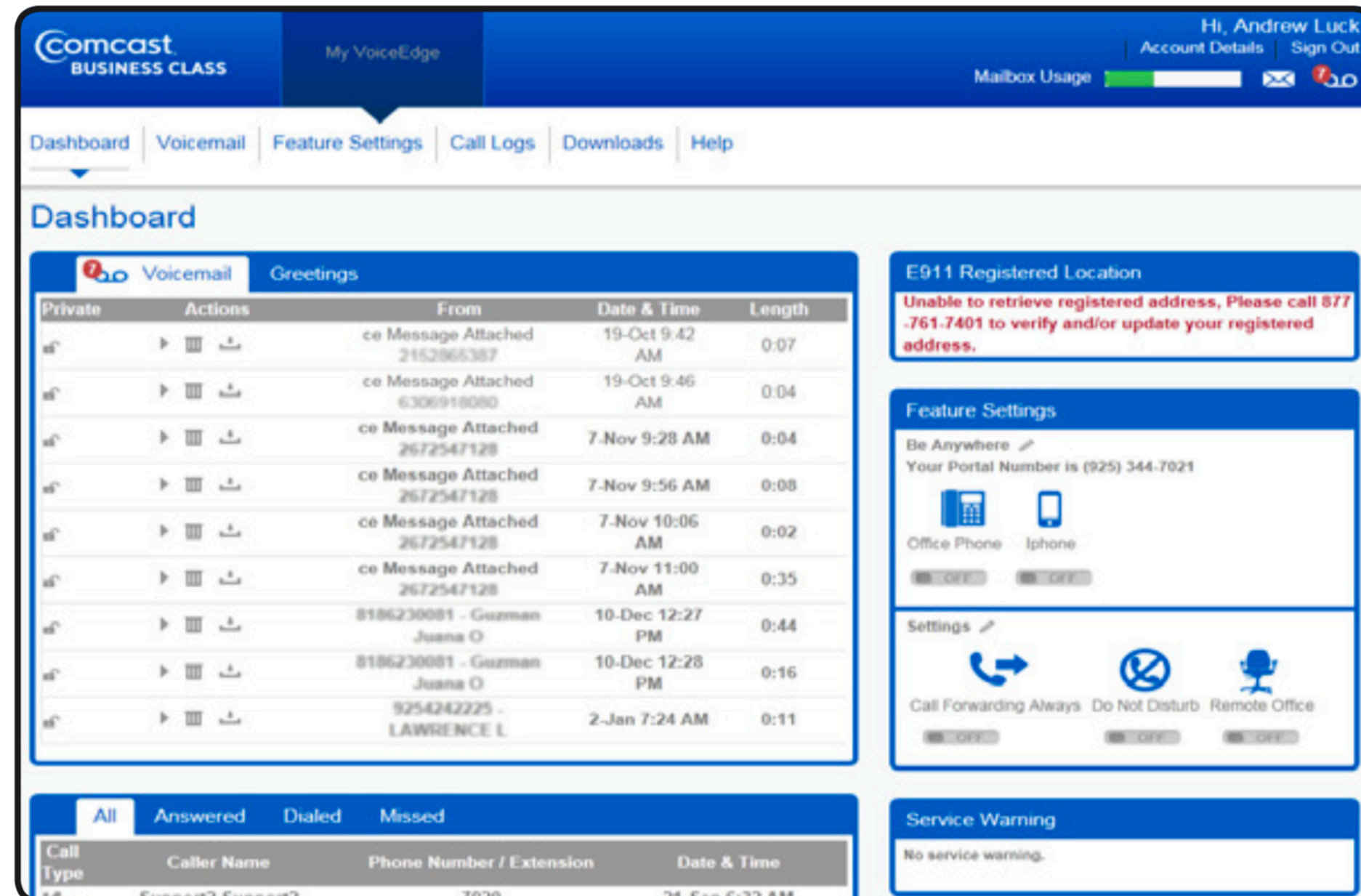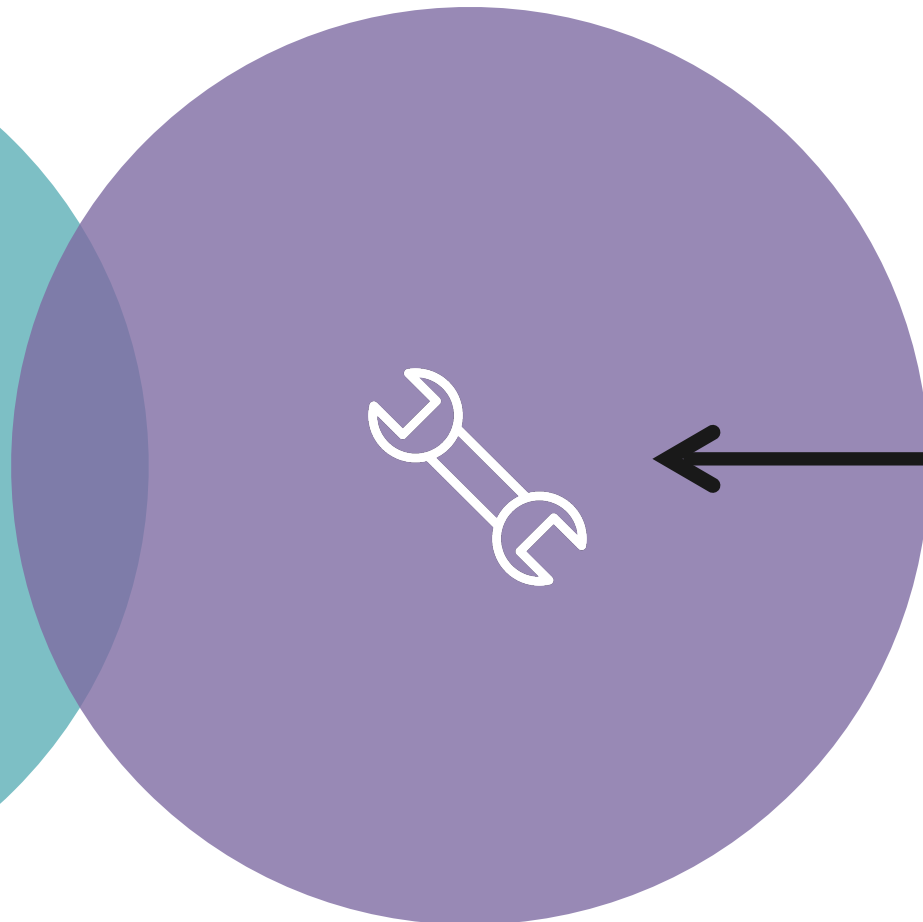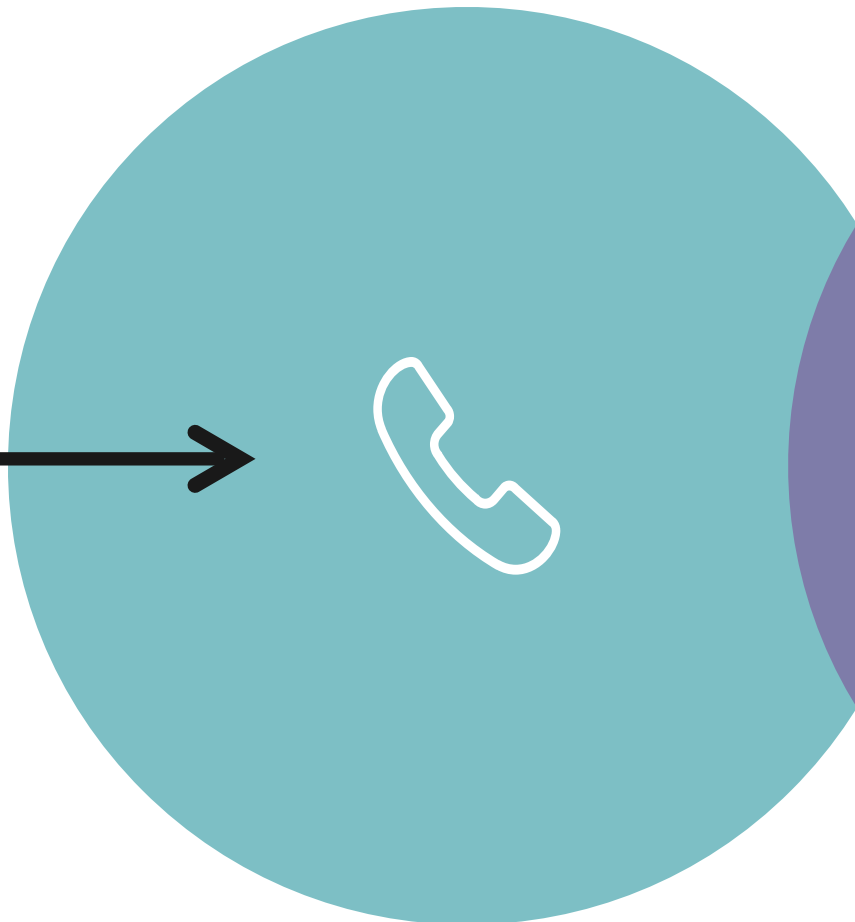
06 MAGIC WAND

"If you had a Magic Wand that could change anything about BVE,
what would you change?"

Improve

Make the call flow visually
more intuitive

Fix

Reoccurring issue of updating/
editing user information,
profile ID, extensions

CUSTOMER JOURNEY

CUSTOMER JOURNEY

DISCOVERY   DISCOVERY   ONBOARDING   ONBOARDING   ONBOARDING   ENGAGEMENT

SOA PURCHASE   **ICC**   **IMPLEMENTATION CALL / S.I.M.O.N**   **DAY OF INSTALL**   **PIVOT TRAINING**

Primary Managers vocally agree to call flow with the SDE although this may be first time they hear terminology

Customers are most engaged DOI+ but lack confidence to make changes due to info overload

Pre-install issues frequently left unresolved until training session.

PAIN POINTS

COMMON ISSUES

ROLE MANAGEMENT

"The most challenging thing to teach customers is how to log in as an admin and make changes." - Care Rep

SETTING UP USERS

"The biggest problem with the portal is granting user access " - Care Rep

"I have not had a single MyAccount customer who doesn't need my help to set up users" - PIVOT Trainer

SCHEDULES

"When a customer reaches an SDE, he will explain what it [scheduling] does but might not be familiar with the verbiage. When they describe features with scenario/story it gives customers an A-HA moment" - Care Rep

FEATURE ISSUES

BE ANYWHERE

PIVOT Trainers need a line of questions just to help customers understand what BeAnywhere offers.

CALL QUEUE

Managing and removing users from queue is a concern; if they're using a queue they're expecting a large call volume, which adds more concern to the customer.

BULK EDIT

"Push to talk requires going into each user and applying the push to talk field and requesting those users. Why can't I just change a bunch of users with 1 click?" - PIVOT Trainer

CUSTOMER INSIGHTS

WHAT WE KNOW ABOUT OUR CUSTOMERS

"Larger businesses have dedicated IT staff who manage phones."

"The smaller the business, the less they know what they're doing."

Max 20 - 30 sites with 10-15 seats In a group

Hospitals, Campuses, Realty groups

Most customers are small businesses (<15 seats)

Example of what an edge case looks like today.

Examples of existing BVE customers.

WHAT WE KNOW ABOUT OUR PM's

5% of PMs are tech savvy

Every MYA user needs help

Information overload

Even tech savvy IT-types will need to call Care at some point.

Customers have a sense of being overwhelmed by a complex phone system.

Videos, articles, multiple support pages & documents, calling CPM, PIVOT, Care

NEXT STEPS

NEXT STEP

CUSTOMER INTERVIEWS

Interview end users to define needs, expectations and mental models in order to simplify IA and hierarchy of portal and a better Day 1 experience.

RETHINK ON-BOARDING

- Utilize the right channels and formats (product tours, workflows, tool tips, on boarding flow, signup flow, Day 1 Experience)
- Build confidence using help & support resources

DEVELOP INTUITIVE UI

- Develop a strong value proposition for digital experience
- Implement timely prompts and active guidance.
- Incorporate decision-making actions into visually friendly workflow

THANK YOU