

CLEAR CONNECT 2019

# Cherwell's New User Experience

What's Coming and Where We're Going

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Chris  
Paddock

## cherwell

- Director of Cherwell's inaugural User Experience team
- Over 20 years of experience in UX and digital strategy.
- Built teams, applications, and processes for startups, not-for-profits, and Fortune 500 companies including Bank of America, Fidelity Investments, Sallie Mae, and Virgin Pulse

# Agenda

- UX at Cherwell
- User Research
- Demonstration



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PART 1

# UX at Cherwell

Chris Paddock

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# Committed to UX

- In-house UX team
- UX lab, research equipment
- Ongoing research with customers, SMEs
- Executive management support

UX: A competitive advantage.

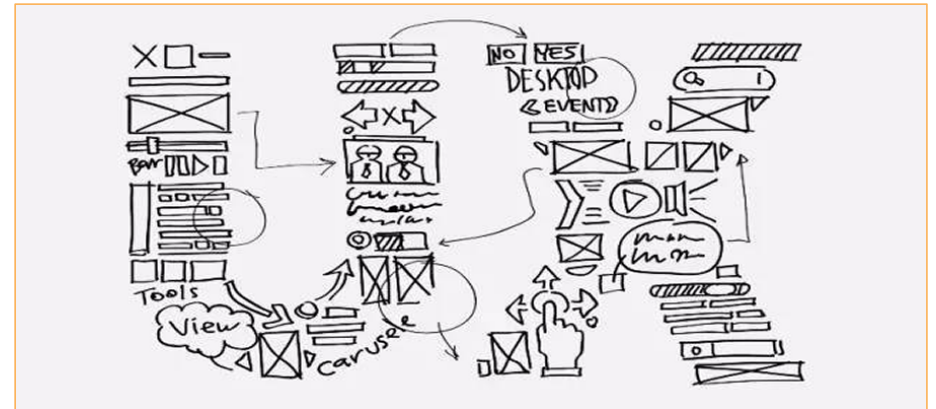


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# What Is User Experience?

Anything experienced by the end user of the product

- **Interaction design** (forms, flows)
- **Visual design** (UI or look and feel)
- **Research** (interviews, usability testing)



Problem solvers, not artists.

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# Focus on the End User

## End Users

- Technicians, Customers, Managers, Executives

## KPIs

- First response
- Rate of resolution
- Customer resolution



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PART 2

# User Research: Incident

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# The ROI of Research

## Research helps:

- Mitigate risk
- Ensures efficient task completion
- Saving time and money

## Types of Research

- Field research
- Analytics
- Ticket walkthroughs
- Best practices (forms)
- Competitive analysis
- Usability testing

# Research: Where to Start?

**You are not your user.**

- Who will use this?
- How do they do their job?
  - *Observe, don't ask what they like/don't like*
- What are best practices for these form factors?
- Are their industry conventions or standards?
  - *Vocabulary? SLA format? Etc.*

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# Incident: Ticket Walkthroughs

Observing multiple Tier 2/3 techs walk through closed Incident tickets.

- Techs come in “blind”
- Can take 60 min to assess a ticket
- Scan meta info first, then ignore
- Spend most time in Journals
- Classification is complicated
- Journals as a timeline
- Entry details are too linear
- Customer messages broken out

# Heuristic Evaluation

Cherwell SERVICE MANAGEMENT

Incident 102385

Record Classify Investigate Resolve Close

Step 1: Record the Details

Short Description:

Description:

Call Source: Phone

Step 2: Classify

Service:

Category:

Subcategory:

Priority:  Major Incident  Impact:  Urgency:

Primary Ct:

Step 3: Investigate the Incident

Additional Details:

Service Catalog Templates Journals Tasks Last 30 Days Configuration Items SLM History Change Request Problem

ID	Title	Description	Portal Description	Business Owner
Records 0 - 0 of 0				

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# Heuristic Evaluation

The screenshot displays the Cherwell Service Management interface for Incident 10237. The interface is divided into several sections:

- Header:** Cherwell SERVICE MANAGEMENT, Languages, Henri Bryce, and a search bar.
- Navigation:** Home, New, Searches, One-Steps, E-mail, Dashboards, Pages, Reports, Visualizations, Calendars, Tools.
- Incident Overview:** Incident 10237, Status Pending, Priority 1, Requestor John Allard, Owned By You (3rd Level Support), SLA Silver, and I Want To: Take Ownership, Escalate to Level 2, View Detailed Date/Time Information, Link to Existing Major Incident, Submit to Knowledge Base, Track Time.
- Form Steps:**
  - Step 1: Record the Details:** Short Description (test), Description (test), Call Source (Phone), and buttons for Record, Classify, Investigate, Resolve, Close.
  - Step 2: Classify:** Service (Enterprise Apps), Category (PeopleSoft), Subcategory, Priority (1), Major Incident (unchecked), Impact (Empresa), Urgency (Alto), and Primary CI.
  - Step 3: Investigate the Incident:** Additional Details field.

Annotations on the screenshot include:

- A blue box at the top right stating: "Form is used for both input AND consumption".
- A red box around the Description field with an arrow pointing to it from a blue box stating: "These affordances should only be used for input.".
- A blue arrow pointing from the blue box to the Call Source dropdown menu.

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# Heuristic Evaluation

The screenshot shows a web application interface for service management. At the top, there is a navigation bar with 'Cherwell SERVICE MANAGEMENT' and user information 'Henri Bryce'. Below the navigation bar is a search bar and a menu with options like 'New', 'Searches', 'One-Steps', 'E-mail', 'Dashboards', 'Pages', 'Reports', 'Visualizations', 'Calendars', and 'Tools'. The main content area displays a table of journal entries. A blue box with the text 'Timeline view is helpful' has an arrow pointing to the table. The table has columns for 'Type', 'Created', 'By', and 'Details'. The first row is selected, and its details are shown in a right-hand pane. A blue box with the text 'Detail view is too linear' has an arrow pointing to the details pane. Another blue box with the text 'Every action is documented' has an arrow pointing to a specific entry in the table.

Type	Created	By	Details
Journal - History	2/13/2018 1:45 PM	Cherwell Admin	The value in the field Priority was set from the value 2 to the value 3 on 8/19/2016 by CSDAdmin.
Journal - History	2/13/2018 1:45 PM	Cherwell Admin	The value in the field Urgency was set from the value Company to the value Medium on 8/19/2016 by CSDAdmin.
Journal - History	2/13/2018 1:45 PM	Cherwell Admin	The value in the field Impact was set from the value High to the value Department on 8/19/2016 by CSDAdmin.
Journal - History	11/9/2017 12:48 PM	Cherwell Admin	The value in the field Short Description was set to the value E-mail down on 3/9/2014 by CSDAdmin.
Journal - Customer Request	10/28/2017 10:09 AM	John Allard	
Journal - Customer Request	10/8/2017 9:38 AM	Andrew Simms	Added by Andrew Simms on Friday, December 20, 2013 via the Company Portal. Please contact me Added by John Allard on...
Journal - Customer Request	10/8/2017 9:28 AM	John Allard	
Journal - Customer Request	10/1/2017 10:32 AM	Andrew Simms	Added by Andrew Simms on Friday, December 13, 2013 via the Company Portal. Hey Added by John Allard on Friday, Deco...
Journal - Customer Request	10/1/2017 10:26 AM	John Allard	
Journal - Customer Request	10/1/2017 10:21 AM	John Allard	
Journal - Customer Request	9/27/2017 10:54 AM	John Allard	
Journal - History	9/24/2017 12:38 PM	Andrew Simms	The value in the field Urgency was set from the value High to the value Company on 8/5/2013 by andrew.
Journal - History	9/24/2017 12:38 PM	Andrew Simms	The value in the field Impact was set from the value Company to the value High on 8/5/2013 by andrew.
Journal - History	9/24/2017 10:26 AM	Andrew Simms	The value in the field Status was set from the value In Progress to the value Pending on 10/30/2013 by andrew.
Journal - Customer Request	9/9/2017 12:26 PM	John Allard	
Journal - Customer Request	8/24/2017 12:15 PM	John Allard	8/7/2013 1:14 PM by John Allard Please inform me of the status of this Incident
Journal - History	8/24/2017 11:55 AM	John Allard	The following changes were made to the Incident 101326 by john on 8/7/2013: Field Priority was changed from the value 1 to L...

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# Heuristic Evaluation

The screenshot displays a service management interface for incident 102374. The incident is in a 'Pending' status. The interface includes a navigation menu at the top, a search bar, and a main content area with various tabs and fields. A modal window for composing an email is open, showing the recipient 'Test.Recipient@company.com' and the subject 'Regarding Incident 102374'. The email body contains a salutation 'Dear John,' and a message starting with 'Regarding your Incident 102374, logged on 4/3/2018 11:11 AM, we have the following question or update:'. Two callout boxes provide feedback: one points to the email body with the text 'Techs like customer messages to be separate.', and another points to the incident details with the text 'Comms and Knowledge block important info.'

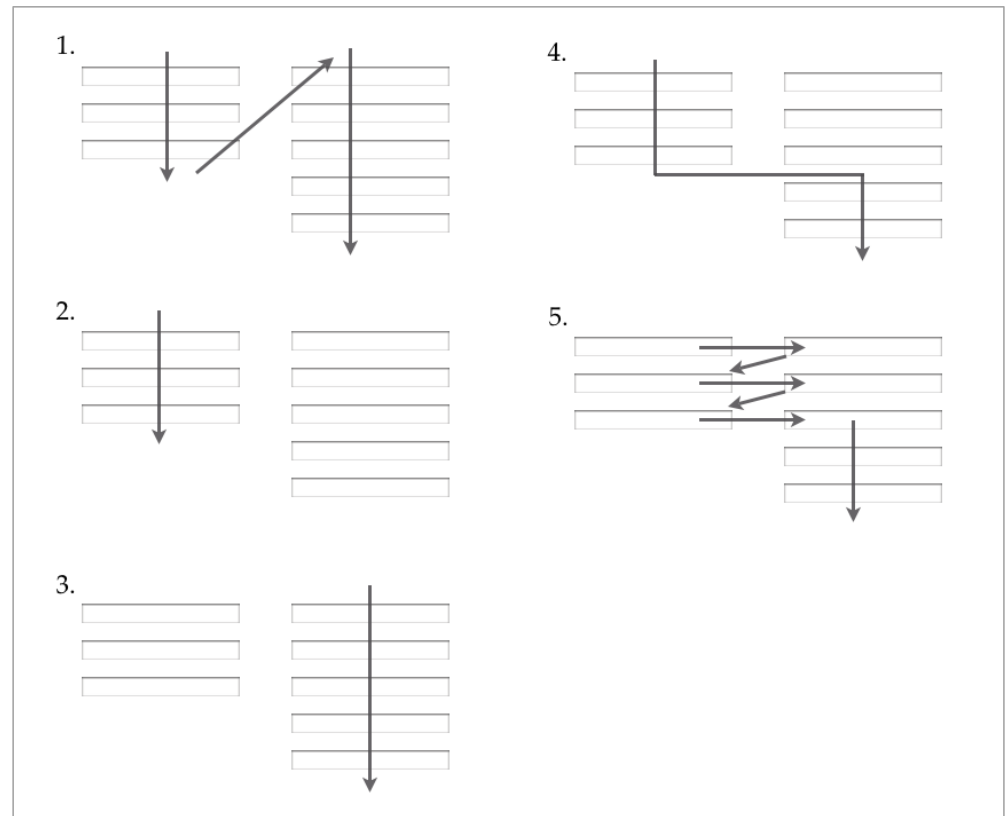
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# Best Practices: Forms

## Baymard Institute

- Large-scale usability testing
- Multi-column forms can be interpreted in multiple ways
- Misinterpret forms, but also misinterpret inconsistently



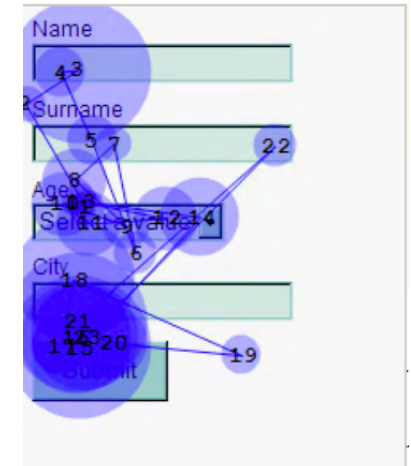
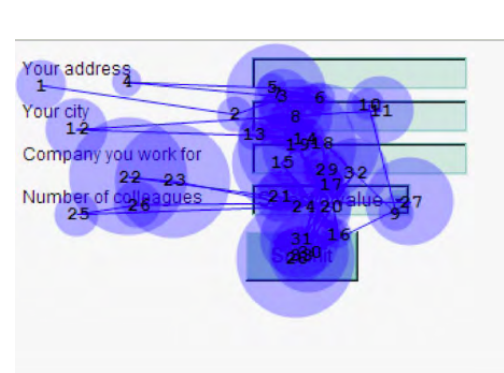
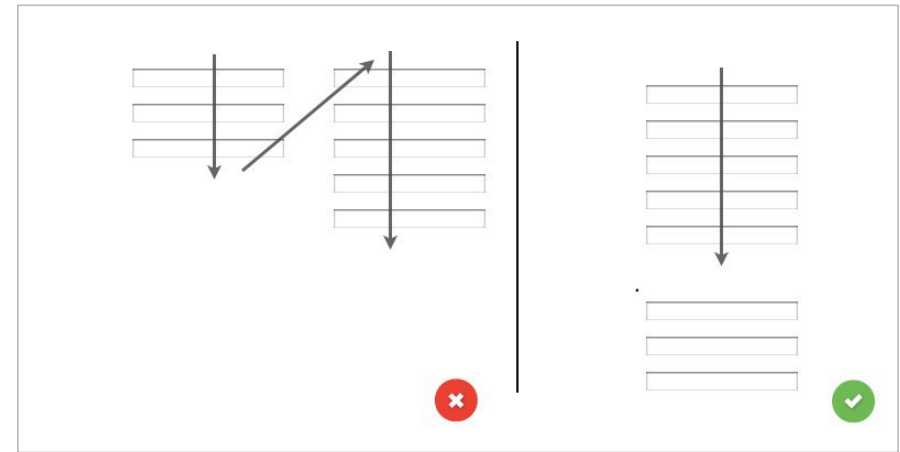
# Best Practices: Forms

Luke Wroblewski (Luke W.)

- Eye-tracking studies
- Vertical alignment
- Top-aligned labels

## Other Resources

- Credit card apps (all on one page)
- Mortgage applications



# Heuristic Evaluation

Clean, modern UI.

Show All Active Incidents (record 53 of 102 search records) [←](#) [→](#)

[↑](#) List View [+](#) New Incident [↓](#) Apply Template [↓](#) Save [↻](#) Refresh [📌](#) Pin It [🗨](#) Share [👤](#) Assign Incident to Me [+](#) Add New Task [🗑](#) Close Incident [+](#) Add Problem [🖨](#) Print In

## Incident: 10502 (Active)

### Customer & Owner

Customer: Ron B Thomas  
RThomas@saasitdemo.com  
+27 (0)11 575 7555

Status: Active  
Team: Service Desk  
Owner: Ron B Thomas

Response Target:  Met  
Resolution Target: 1/26/2012 9:42 AM  
 Breached 1/26/2012 9:42 AM

Details | Task (1) | Master Incident

#### Summary

Reporting network Access Time Out

#### Description

Network access time out in the South Africa office when attempting to access shared network resources.

Service: Network Service  
Category: Network Folder Failure  
Source: Phone  
Impact: Medium  
Urgency: High  
Priority: 2

Declare as Master Incident  
 Update Related Incident

#### Resolution

AutoClose

Cause Code: Linked Problem  
Actual Service: Network Service  
Actual Category: Network Folder Failure  
 First Call Resolution

#### Attachment

[📎](#) Attach file [📄](#) Paste from clipboard

#### Asset

[🔗](#) Link [🗑](#) Unlink

#### Audit Info

Created By Self Service, 1/23/2012 9:42 AM  
Modified By Frs\_Ed, 2/20/2015 11:36 AM

#### Journal

[🗨](#) Create [🗑](#) Unlink

Clean field alignment.

Classification is hard.

Journals are exposed, user friendly.

Process flow is unconventional.

# Design Requirements

- Limit forms to input of data, not consumption
- Create a focused, context-based workspace
- Allow techs to use journals with related functions and data
- Provide both detailed and timeline view of entries

The screenshot displays the Cherwell Service Management interface for a new incident. The main form is titled "Incident 10238" and is divided into three steps: "Step 1: Record the Details", "Step 2: Classify", and "Step 3: Investigate the Incident".

**Step 1: Record the Details**

- Short Description:
- Description:
- Call Source:

**Step 2: Classify**

- Service:
- Priority:
- Category:
- Subcategory:
- Impact:  Major Incident
- Urgency:
- Primary CI:

**Step 3: Investigate the Incident**

- Additional Details:

The interface includes a navigation menu at the top with options like "New", "Searches", "One-Steps", "E-mail", "Dashboards", "Pages", "Reports", "Visualizations", "Calendars", and "Tools". The bottom of the screen shows a table with columns for "ID", "Title", "Description", "Portal Description", and "Business Owner".

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# Solution

- Contemporary, 508-compliant
- Single-column forms
- Guided transitions
- Focused, context-based workspace

The screenshot displays the Cherwell Service Management interface for an incident record. The header includes the Cherwell logo and navigation options like 'New', 'Searches', 'One-Steps', 'E-mail', 'Dashboards', 'Pages', 'Reports', 'Visualizations', 'Calendars', and 'Tools'. The incident details show a status of 'In Progress', a resolution breach on 12/19/2018 at 9:32 AM, and is assigned to Henri Bryce, a Level 2 Support agent. The interface is divided into several sections: 'Overview' with tabs for 'Activity', 'Tasks (3)', and 'Approvals (1)'; 'All Journals (26)' with sub-tabs for 'Internal Notes (4)', 'External Communication (7)', 'System Audit (15)', and 'Pinned (2)'; a search bar for 'Search External Communication'; and a list of messages. The messages include one from Sandia Blundell (IT Management) to Juliana Albert (Customer) on 18 Jul 2017, and another from Juliana Albert (Customer) to Sandia Blundell (Service Desk Manager) on 19 July 2017. A right-hand sidebar contains 'Attachments (3)', 'Communication' (with 'Contact Customer' and 'New Thread' buttons), 'Event Timeline', 'Customer History (3)', and 'Affected CI'. The 'Communication' section shows a 'Communication Channel' dropdown set to 'E-Mail (default)', and a 'Message' input area. The bottom right corner features the B I U logo.

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# Validation: Usability Testing

**Observing qualified users use your new design.**

10 ITIL certified technicians

- Create a new ticket
- Analyze a closed ticket

Many minor issues were identified, changed

Directionally, layouts were validated

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PART 3

# Demonstration

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# Questions?

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