CLEAR CONNECT 2019

Cherwell's New User Experience

What's Coming and Where We're Going

CLEAR CONNECT 2019

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

PART 1

UX at Cherwell

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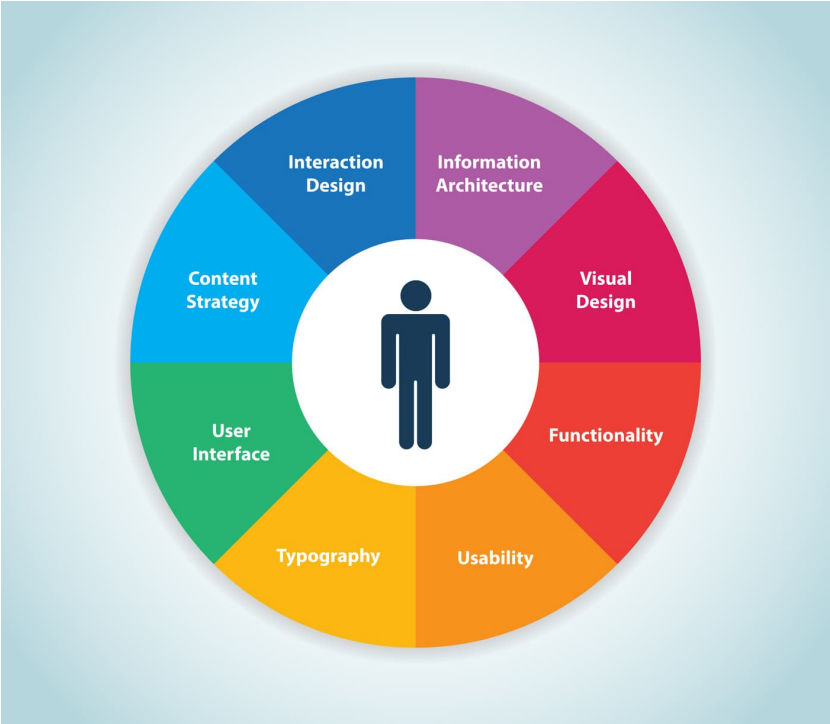
Committed to UX

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

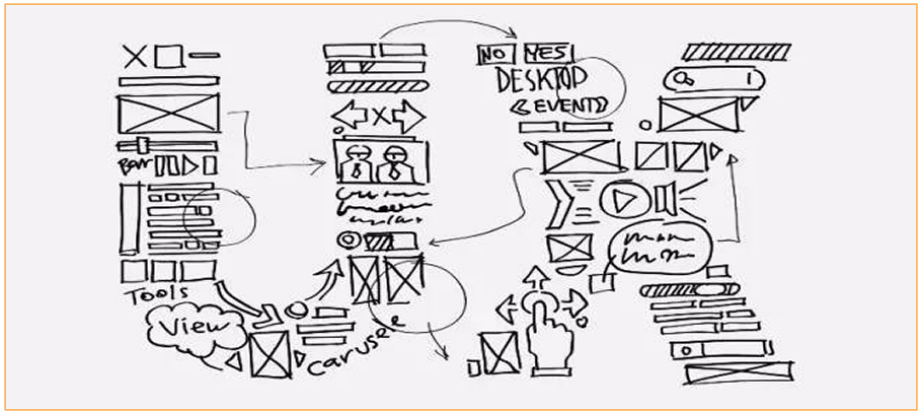
UX: A competitive advantage.



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.

Focus on the End User

End Users

- Technicians, Customers, Managers, Executives

KPIs

- First response
- Rate of resolution
- Customer resolution

Paying It Forward

Benefits

- Minimize customization work
- Less training
- Less time on calls
- Less time in inboxes

Insights shared at user groups, conferences, and communities.

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.

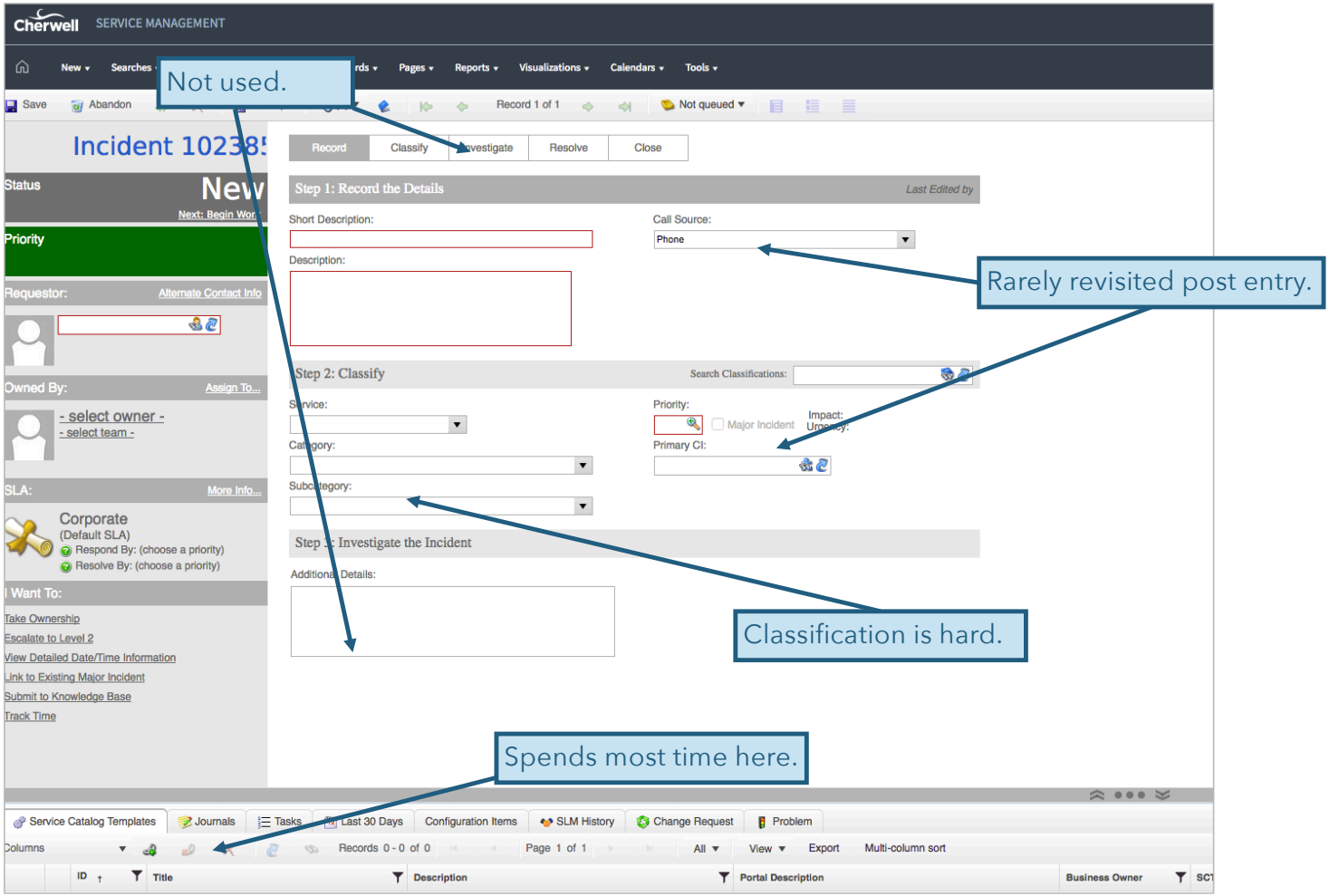
- Who will use this?
- How do they do their job?
  - *Observe, don't ask what they like/don't like*
- What are best practices for these form factors?
- Are their industry conventions or standards?
  - *Vocabulary? SLA format? Etc.*

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



Heuristic Evaluation

Cherwell SERVICE MANAGEMENT

Languages | Henri Bryce

New | Searches | One-Steps | E-mail | Dashboards | Pages | Reports | Visualizations | Calendars | Tools

Save | Abandon | Unlocked | Lookup | (0) | Record 5 of 29 | Not queued

Form is used for both input AND consumption

Incident 10237

Status: Pending
Customer is unavailable
Review: 4/10/2018
Next: Remove Pending

Priority: 1 (Status)

Requestor: Alternate Contact Info
John Allard
John.Allard@RiverTCorp.com
- no phone on record -

Owned By: Assign To...
You
3rd Level Support
833-898-8787
henri.bryce@RiverTCorp.com

SLA: More Info...
Silver
(Customer SLA)
Respond By: 4/3/2018 11:15 AM
Resolve By: 4/3/2018 11:15 AM

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

Record | Classify | Investigate | Resolve | Close

Step 1: Record the Details — *Last Edited 4/3/2018 11:15 AM by Henri Bryce*

Short Description: test
Call Source: Phone
Description: test

These affordances should only be used for input.

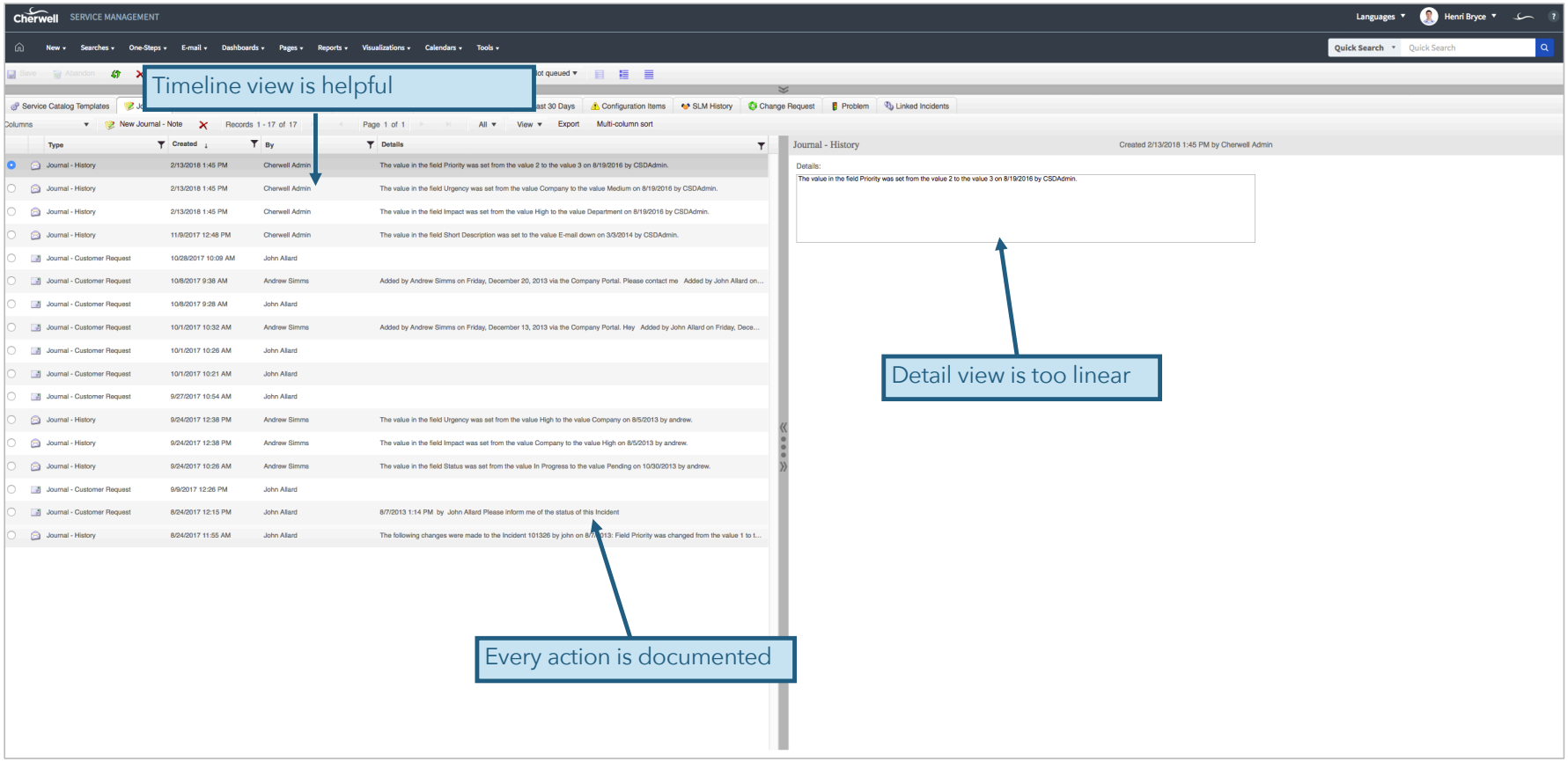
Step 2: Classify

Service: Enterprise Apps
Category: PeopleSoft
Subcategory:
Priority: 1 | Major Incident | Impact: Empresa | Urgency: Alto
Primary CI:

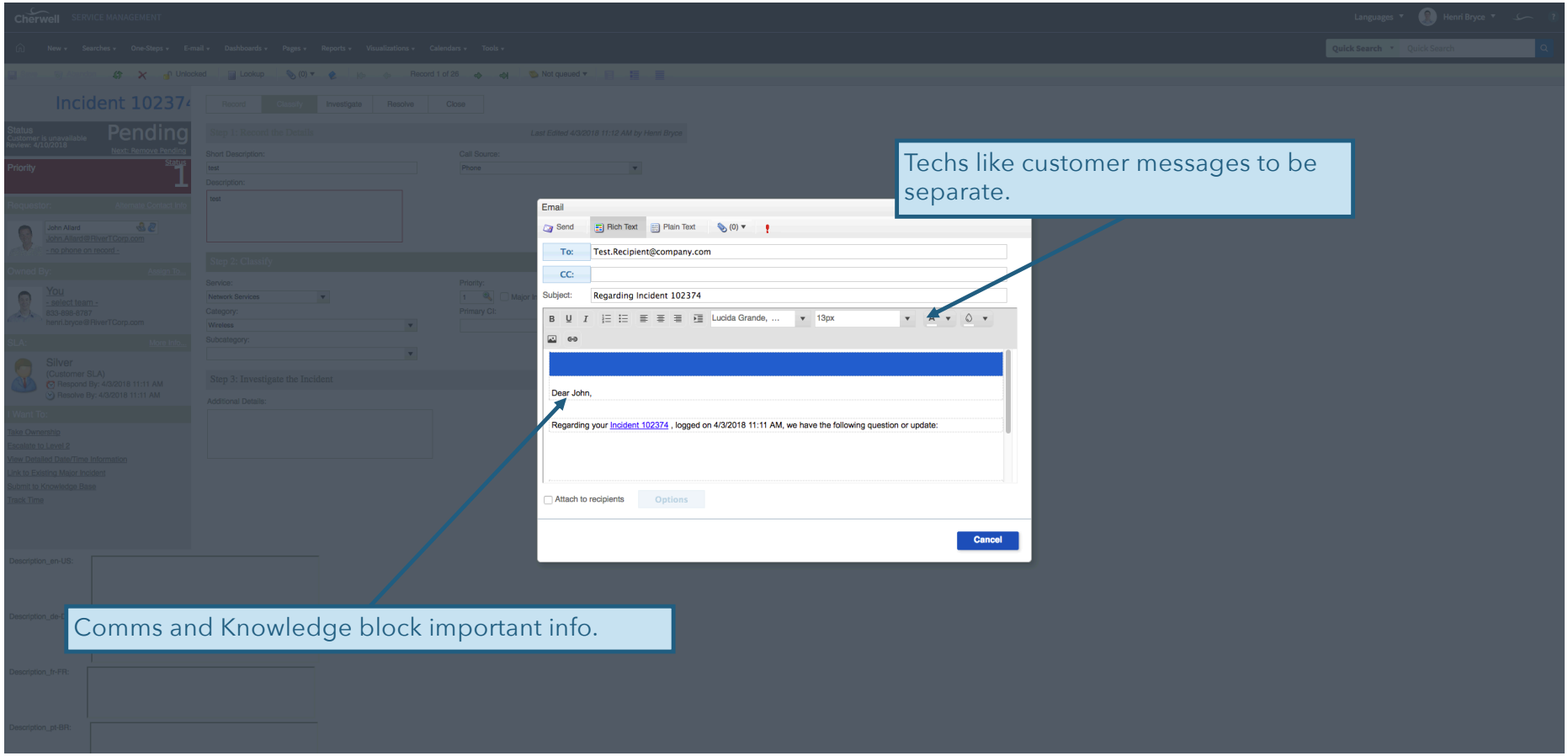
Step 3: Investigate the Incident

Additional Details:

Heuristic Evaluation



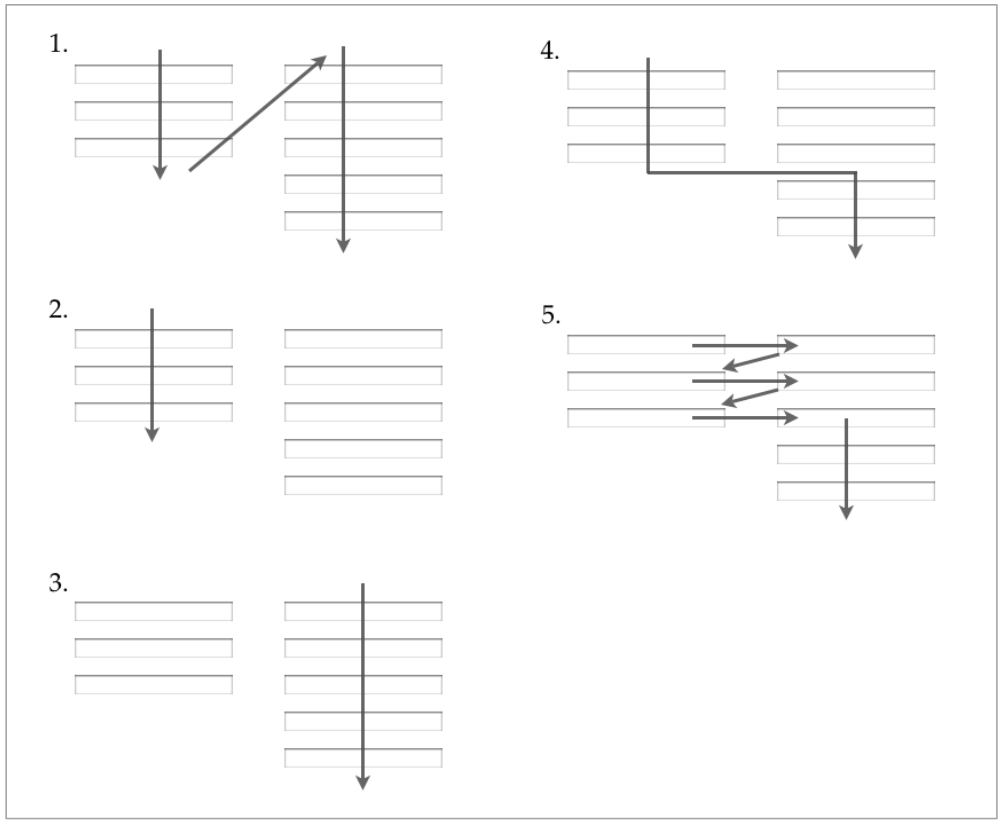
Heuristic Evaluation



Best Practices: Forms

Baymard Institute

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



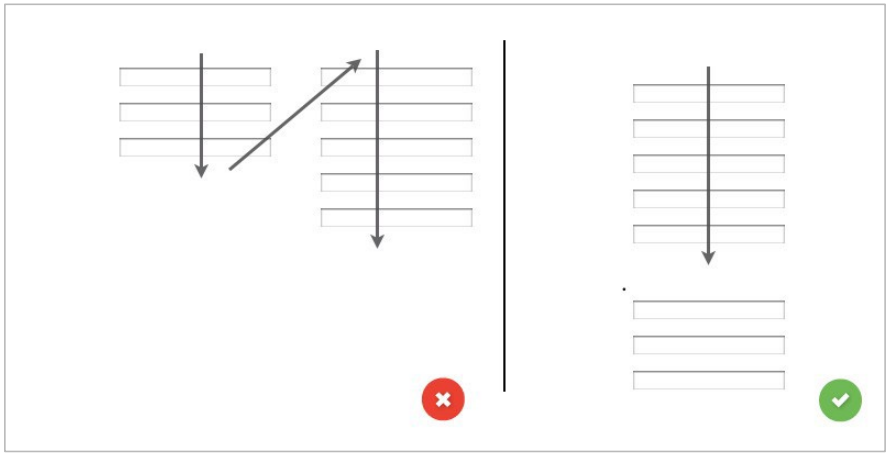
Best Practices: Forms

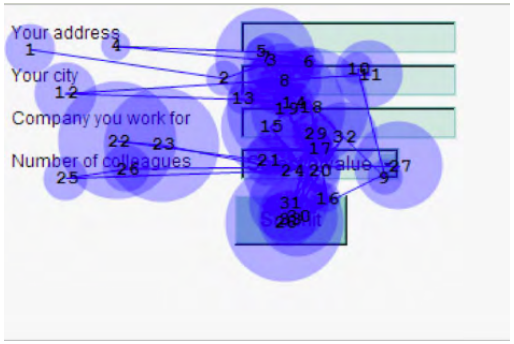
Luke Wroblewski (Luke W.)

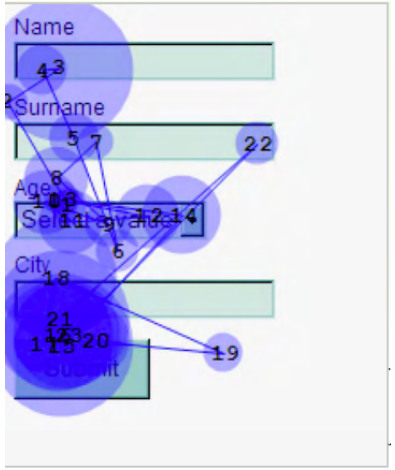
- Eye-tracking studies
- Vertical alignment
- Top-aligned labels

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.

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

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

Clean field alignment.

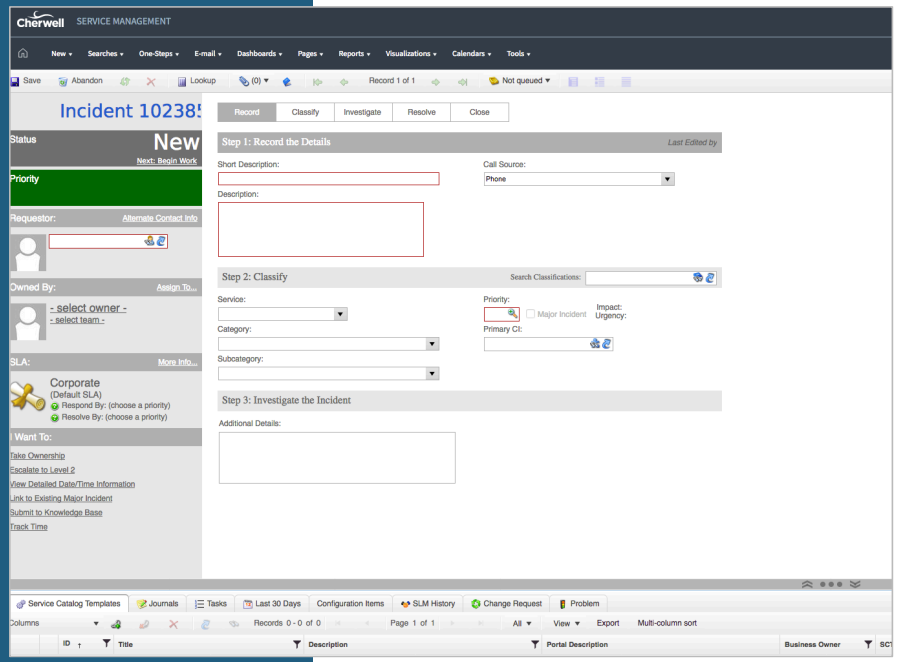
Classification is hard.

Journals are exposed, user friendly.

Process flow is unconventional.

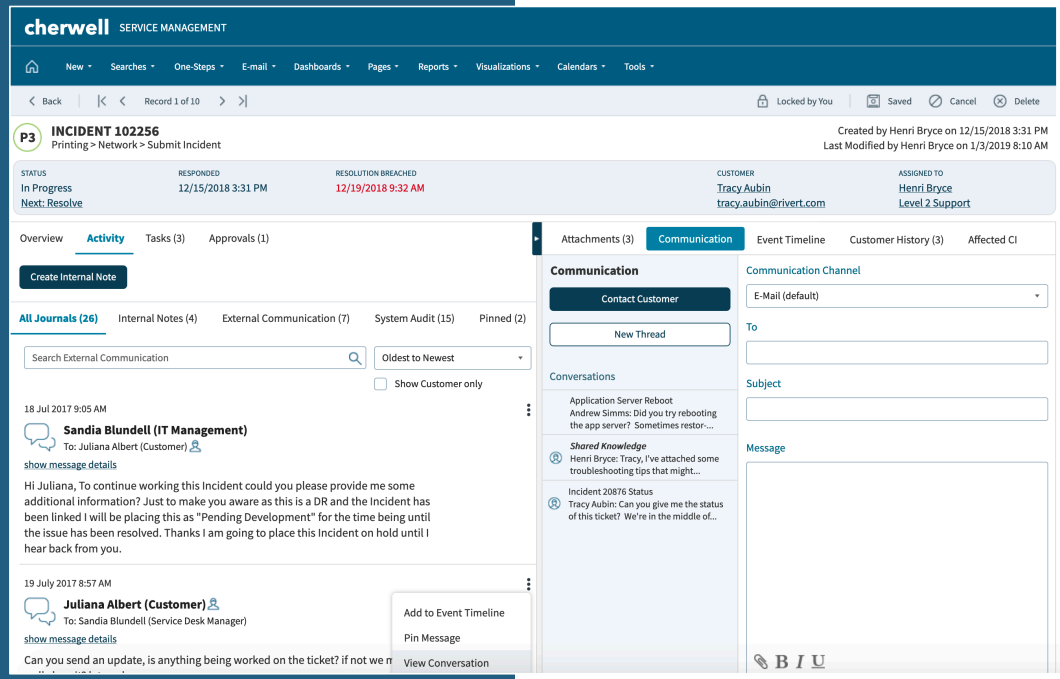
Design Requirements

- 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



Solution

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



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

PART 3

Demonstration

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Questions?

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