

Service Now Design Document Intro

An Approach to Achieving Our Business Goals

Service Now uses editable information displayed in context to inform and educate the Customer Service Representative (CSR). This context is the customer's relationship to their up-to-date personal information and their current accounts. To achieve the goals of Service Now, it is critical that the CSR is always aware of the Customer in context.

To cut training for new CSRs from 10 weeks to 2 weeks we...

- Move business logic into the application
- Simplify user interface and error handling
- Place more product information into application
- Make arithmetic the responsibility of the application
- Improve navigation overall

To reduce call backs, improving customer acceptance of products serviced within SN we...

- Build in error prevention to application
- Confirm changes with customer
- Make arithmetic the responsibility of the application

To reduce AHT we...

- Create multiple access points for information accessed frequently
- Provide context for information when needed
- Make overt references to changes and scheduled items
- Combine displays of related information
- Alleviate need for CSR to write up actions by recording activity automatically

Visual Mental Model for Service Now

PFW's concept of Customer and Account information separation is one that we have tried to translate cleanly into Service Now. Visually PFW does not support the idea that certain types of information relate directly to either the Customer or to the Account. This idea had to exist in the CSR's head. With Service Now we created a visual model to support the separation of this information. The Customer Panel bounds the Account Panel: Customers have Accounts.

The Customer Panel is where a CSR views and edits Customer information. The Account Panel is where one enters Account information. Once the CSR can associate certain information with each panel, this simple delineation will serve to familiarize them with the business as well as reduce AHT.

The Mental Model is visual and literal: easy to learn. The end result should be that as CSRs associate their experiences and training to the mental model, they are able to process calls more quickly. The Mental model will help them locate information without rote memorization.

Page Model

The Page Model for Service Now is constructed *to maintain context* from activity to activity while allowing the CSR to dive deeply into relevant details during an activity. The visual interface of Service Now is much more dynamic than that of its predecessor, PFW. With this added dynamism comes the need to smooth the transition from page to page.

Maintaining Customer and Account context is critical to the key business requirements driving the design of Service Now: cut training time for new CSRs, minimize errors made by CSRs, and diminish Average Handle Time (AHT).

Supportive Context

Information provided in context, when needed, by high visibility elements

- Customer Identity and information relating to the customer
- Account Identity and information relating to the account
- Customer's Accounts and status of each
- Transactions per account
- Comments of top importance per account

The Main Panel, the Macro, and List Layers

The Service Now Page Model consists of the following three primary elements: the Main Panel and its reference tools the Macro and the List Layer.

The Main Panel

The Main Panel is the primary workspace for the CSR. The Panel has three views: The Agent Panel, the Customer Panel, and the Account Panel. An Account Panel is always shown bounded by (in other words, in the context of) the Customer Panel to which it belongs.

Customer Panel

- Information specific to the Customer
- Customer Hub, Contact Information, Funds Source Management, End Call.

Account Panel

- Information specific to an Account
- Account Hub, Manage Payments, Manage Relationships, Payee/Mortgage Info, Enrollment Info, Document, Refund and Research Requests,

Agent Panel

- Outside the context of a particular Customer, this is where the CSR locates and engages the account relating to the Customer on the line
- Agent Hub, Search, Search Results, Login and Password update

The Macro

A cross between a remote control and a heart monitor, the Macro never leaves the CSR's side.

The Macro is a 300+ pixel wide dynamic list of a customer's accounts, providing easy access to key information for each account. The Macro also prominently displays important notices and comments about the customers and their accounts, preserving context and making it faster and easier to gather a comprehensive picture of a customer.

The Macro is a navigation tool. Navigate directly to...

- Customer Hub
- Account Hub
- Manage Payments
- Transactions List and Transactions
- Integrity Warnings
- Attention Comments
- Future-dated changes

The Macro is a display tool. Immediately view and assess the status of a Customer's accounts.

- Customer Identification

- Account identification, status display, reflecting the Account “in process” in the Main Panel
- Transactions display
- Warnings, comments display

The Macro shows information in context.

- The Comments section of the Macro shows comments associated with the section that is active.

The List Layer

The List Layer serves as a deeper reference for the CSR, providing an overview of related activity in 5 key areas: Activity, Calls, Changes, Requests, and Comments. A quick review of a Customer’s account via the lists should be able to familiarize a CSR with the Customer’s context in a matter of seconds. There is a List Layer for each Customer and for each of the Customer’s Accounts. The Customer List Layer displays a comprehensive view of information from all Accounts.

Activity List

- Customer and Account activity

Calls List

- List of End Call details and PFW End Call details for a Customer

Changes List

- Changes made at the Customer and Account levels

Requests List

- Requests made at the Customer and Account levels

Comments List

- Comments made on Customer Hub, Account Hub, Details, Change Details and Confirmation pages. Also notification of Integrity Warnings.

List Layer Confirmation Behavior

One further behavior of the List Layer is it confirms the success of a Change or a Request. Once the CSR creates a Change or a Request for the Customer, the CSR confirms the details of the Change or Request with the Customer. Upon confirming the details, the CSR submits the Change or Request and a view of the newly updated Changes List or Requests List respectively opens. Clicking anywhere on the browser window will quickly close the List Layer and allow the CSR to proceed with the call knowing the action has been recorded. This behavior operates on the same principle as MS Windows (XP) when it confirms a print job has been sent to the printer.

Page Templates for the Main Panel

Page Templates

Search

The Agent Hub has been reduced to a simple search template. The Search allows a CSR to enter a small variety of search parameters that imply either a list of results showing accounts or customers. The button next to the query boxes makes the implications explicit: “Find Accounts” or “Find Customers”.

The Hubs

Hubs are Service Now’s primary centers of activity. Each hub provides an overview of a subset of a customer’s information. The following is a list of Service Now’s hubs in hierarchical order:

- Customer
- Account
- Manage Payments

Underscoring the Service Now Visual Mental Model, hubs are contained one inside the next. Moving from Customer Hub to Account Hub to the account's Manage Payments Hub shows the CSR that they are moving ever deeper into the Customer's information. A CSR can navigate to any hub from within the Macro.

Detail (Information)

Persistent information such as Contact Information is displayed in a detail template. Most details are mutable and therefore have Edit buttons to enable a change. An example of a Detail that has no Edit button: a Transaction detail. These details are mutable only within Manage Payments.

Edit

An edit template relates directly to its Detail template, but its fields are editable. Once the CSR has chosen which changes to initiate on the Edit template they choose to submit them, enabling them to confirm the proposed changes with the customer before they are finalized in the system.

We maintain the Edit template separately from the Detail template because it is more likely the CSR will need to review a detail than edit it—and providing an Edit template when a user has requested a detail forces the user toward an action, Submit, Reset or Cancel, when they haven't requested to act at all.

Create

In Service Now a CSR is usually editing information that already exists. In some cases though, it becomes necessary to create new information. One example: Creating a Refund Request. A Create template, like its Edit counterpart, requires the CSR to submit and confirm the request with the Customer before finalizing the request in the system.

Confirm

A Confirm template follows both the Edit and Create templates. It is used to review a proposed Create or Edit with the customer before it is finalized in the system. With the Confirm following an Edit, the original state is compared with the new state—but focusing the CSR's attention on the fields that have been changed. This enables the CSR to confirm quickly and effectively. And to move on.

A unique feature of Service Now is that Confirming a new detail or a change creates a line item in the List Layer. Both changes and requests create entries in their respective lists—and to make this clear to the CSR, the act of clicking Confirm opens the list in the List Layer with the line item highlighted and returns the CSR to the Hub within which the action has happened. The CSR simply closes the List Layer and continues with the call.

Change Detail

The Change Detail template is similar to the Confirm template in that it displays the details of the change, but the Change Detail template represents a point of historical reference rather than an opportunity to confirm with the customer.

Some Change Detail templates offer the ability to delete a future-dated change. Each potential future-dated change type will have its own dependencies regarding when this deletion is possible.

Widgets and Includes for the Main Panel

Widgets are in-page functional elements that appear in more than one page. They are often accessed via a specialized link type and expand to display a small window in which to do the simple task at hand. There are several types of widgets that are found in Service Now; you'll find the type listed in parentheses next to the name of the widget below.

Multistage and Unistage Widgets

Widgets may be simple or they may take the place of full pages, accepting input in one or more stages. Some widgets ("Multistage w/ Confirm") represent miniature processes and ends in themselves. These widgets submit their captured input as a Confirm template would, updating a Customer's or Account's information and implying a List

Layer confirmation. Other widgets (“Multistage” or “Unistage”) simply input their data into the form currently being filled out, thus not implying a List Layer confirmation.

Funds Source Add (multistage w/ confirm)

There are a number of different flows in which the CSR needs to be able to add or replace a funds source for the customer. In a more linear process, a CSR would have to back out of a process already in progress, add the funds source and then return and repeat the actions once the funds source is added. The Funds Source Add widget allows a CSR to add the new funds source while remaining in the flow—saving a trip to 4 pages.

Additional Principal Worksheet (multistage w/ confirm [send psa], multistage [implement])

To help a Customer select the correct additional principal amount for them, it is necessary to be able to tell them the benefits of any value they choose. Of course, the product offers a default value for how much additional principal to include and a view of the benefits associated with that amount. But what if the Customer wants to customize the amount?

The Additional Principal Worksheet leads the CSR through the process. The first step allows the user to choose an amount and a frequency for the amount. The second shows the benefits based on the debit frequency. It allows the CSR to proceed in two forward directions: choosing implement will place the additional principal value into the Customer’s plan. Choosing Send PSA will allow the CSR to send a description of the proposed benefits to the Customer without making the change to the Customer’s plan. The third step, following Send PSA only, allows the CSR to direct the PSA to the Customer’s Mailing Address, Fax Number or both.

Increase or Decrease Withdrawal Amounts (unistage)

A part of Manage Payments: Month, the Additional Withdrawal widget allows the CSR to resolve a positive or negative difference between the sum of the withdrawal amounts and the total payment desired. Using this feature, the CSR will assign the amount of the difference to an OTD, a specific Withdrawal, or across all withdrawals. In the case of a positive difference, assuming the Customer does not want to put the extra amount toward their principal, the feature allows the extra amount to be drawn out of one or more future withdrawals.

Set Override Date (unistage)

A part of Manage Payments: Month, the Additional Withdrawal widget allows the CSR to resolve a positive or negative difference between the sum of the withdrawal amounts and the total payment desired. Using this feature, the CSR will assign the amount of the difference to an OTD, a specific Withdrawal, or across all withdrawals. In the case of a positive difference, assuming the Customer does not want to put the extra amount toward their principal, the feature allows the extra amount to be drawn out of one or more future withdrawals.

Set Fax #, Set Email Address (unistage)

A part of Manage Payments: Month, the Additional Withdrawal widget allows the CSR to resolve a positive or negative difference between the sum of the withdrawal amounts and the total payment desired. Using this feature, the CSR will assign the amount of the difference to an OTD, a specific Withdrawal, or across all withdrawals. In the case of a positive difference, assuming the Customer does not want to put the extra amount toward their principal, the feature allows the extra amount to be drawn out of one or more future withdrawals.

Comments (multistage and multistage w/ confirm)

Comments is a special multistage widget that allows the CSR to add commentary to, create a follow-up for, or create an escalation for a particular detail, change, customer or account. Each action produces a new Comment line in the widget and the Comments list in the List Layer. Depending on the significance of the new Comment, notification may appear in a number of other high visibility areas such as the Macro—as either comment text or a comment icon.

Adding a new Comment to a template’s Comment widget will supersede any other comments contained in it. This most recent comment is the only one from a given template to appear in the Comments list. In other words, any given template will appear in the Comments list only once displaying its most recent comment. To view the remainder of the template’s past comments the CSR simply clicks the link to access the template and scrolls to its comments widget.

- Comments may not be added to future-dated change details since they exist only as projections and are not persistent.

- If a Detail or Change Detail has a Follow-up or Escalation associated with it, Comments may not be added to the information until the Follow-up or Escalation has been formally resolved.
- Comments left in Confirms are multistage, but do not get added to the Comments List until the submission is confirmed. Comments left in any other template are multistage with confirm, meaning that the comment is added to the Comments List upon submission of the Comment (e.g. no submit occurs on a Detail so the Comment submit is the only action a CSR can use to save the comment.).

Comment Notification

According to a comment's place in the hierarchy, it will appear in relation to its priority in prominent places in the Panel Headings and Macro.

- Integrity Warning (not a CSR-generated comment)
- Future Dated Change (not a CSR-generated comment)
- Escalation (CSR-generated comment)
- Follow-up (CSR-generated comment)
- Attention (CSR-generated comment)
- Comment (CSR-generated comment)

Includes Appearing Throughout the Product

There are several elements that do not serve as

Pagination

Pagination is a way of allowing the CSR to move freely to previous and next items for which Service Now manages multiple instances. This includes Monthly Payments instances, Transaction instances, and Lists within the List Layers.

Monthly Payments Pagination

Within Manage Payments, when viewing or editing a monthly payment it is possible to navigate from one month to the next (or previous) via the Monthly Payments Pagination widget. This simple widget also allows one to link directly back to the Manage Payments Hub.

Transactions Pagination

The Transactions list is Service Now's comprehensive view of an Account's transactions. In most cases, it is going to be a multiple page list. We have taken a simple approach that shows total number of pages (page icons) and uses previous and next links. The current page of the list in view shows what slice of the total list the page represents. Mouse over the other page icons and it will display the range of dates that the page will contain. Clicking the last page icon in the list will show the most recent transactions.

Once the CSR has clicked to view a Transaction detail, the pagination concept carries over to allow the CSR to navigate to previous and next transactions, and to return to the list.

List Layer Pagination

Thought not exactly the same as pagination within Transactions, List Layer pagination shows total number of pages, previous and next page links, and describes the range of the current page in view. Unlike Transactions' pagination, the concept does not carry over into the details listed on the page.

FYI

This simple widget allows the CSR to click a link or "i" icon to display a brief message about an in page topic. Most frequently this is used to provide contextual help for the CSR, preventing them from having to navigate to a help section and lose valuable time. Since the objective is a combination of information and speed all that is needed to retire the FYI from the screen is to mouseout (move the mouse cursor out of the box). Other uses of the FYI include getting more information about an agent by clicking an agent's name.

Meta Info

For each action the CSR takes there is a standard piece of meta data that appears on the detail of the action. This takes the form of Customer Name, Detail's Creation Date, and Agent Name. The information is displayed below the details of the action. Note: a Detail's Creation Date is not the same as an Effective Date, and is always listed separately. The Effective Date is displayed with the action itself.