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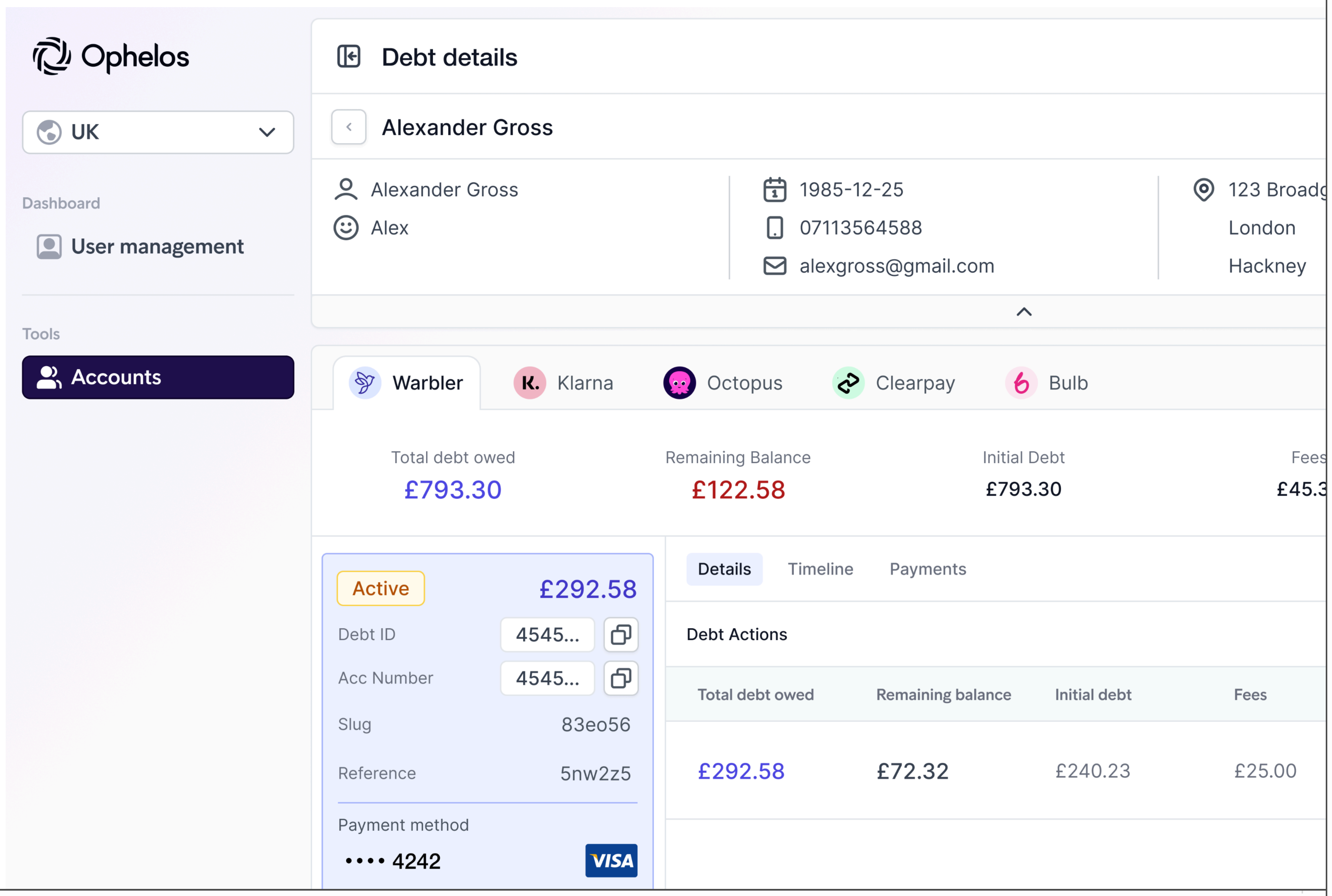
Engage



Role	• *Product Design* • *Product Strategy* • *UX Research* • *Front-end*
Tools	• *Figjam* • *Figma* • *Cursor* • *Warp* • *TailwindCSS* • *Phlex*

Highlights

- I was project owner and lead
- Improved over all product offering for users
- Delivered refined product for Europe rollout
- Reduced support tickets for engineers and enabled self-serve for users

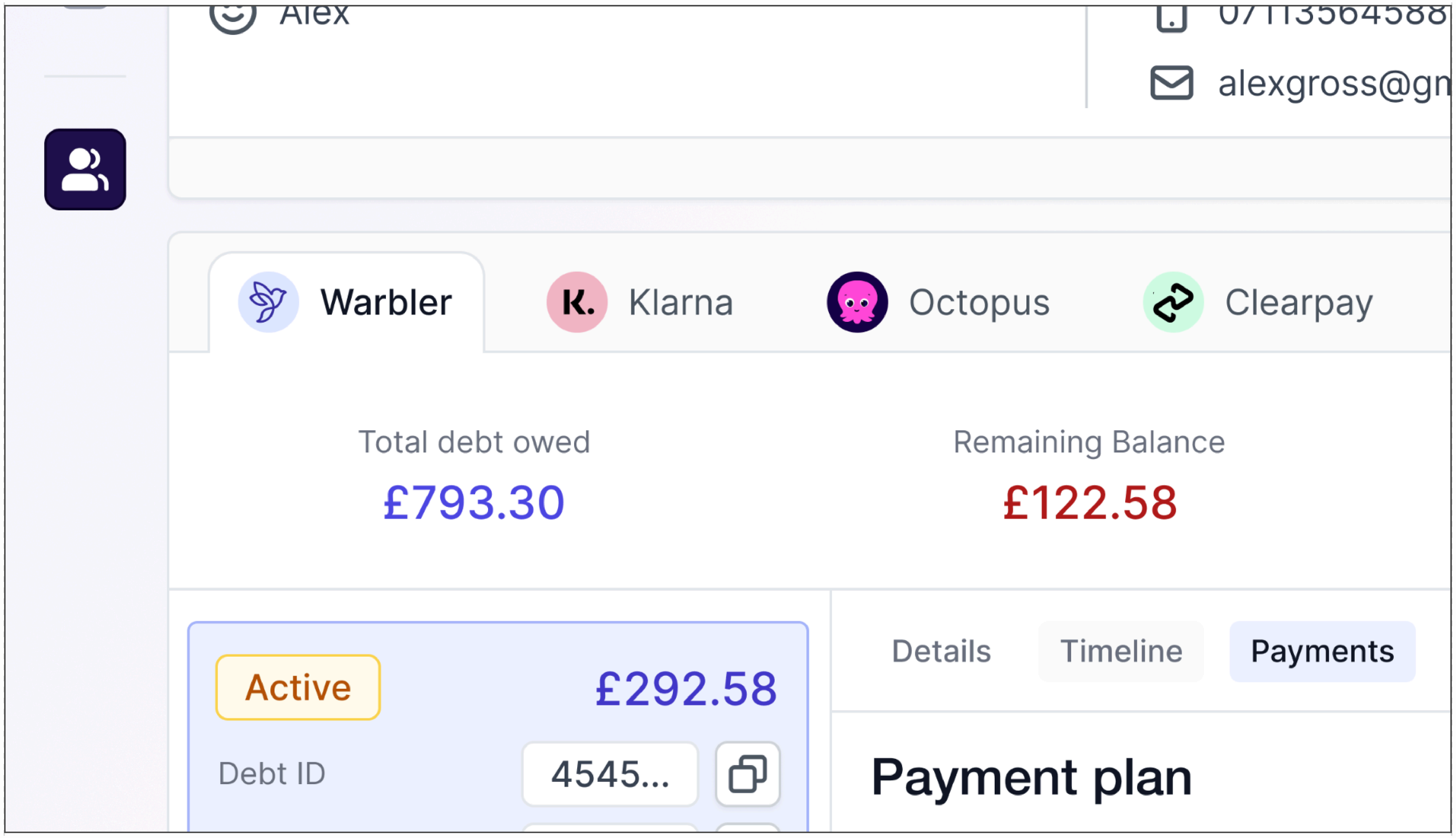
Overview

Introduction

This project was aimed to improve and update the design and functionality of the CRM tool, it was dated and plagued with usability issues. With ‘Engage’, customer operations teams will have a centralised platform to manage and track our customers end-to-end. The aim was to reduce friction and improve ops workflows and become the sole platform for our customer management and support.

Context

This project was part of our broader design and business product roadmap - we were planning on rolling out our platform across multiple European markets, this meant a larger user base beyond our internal team. In order scale we needed a more mature product that better supported users and used the new product ecosystem/design system we were creating, in doing so this would facilitate product improvements and new feature requests at scale.



Challenges

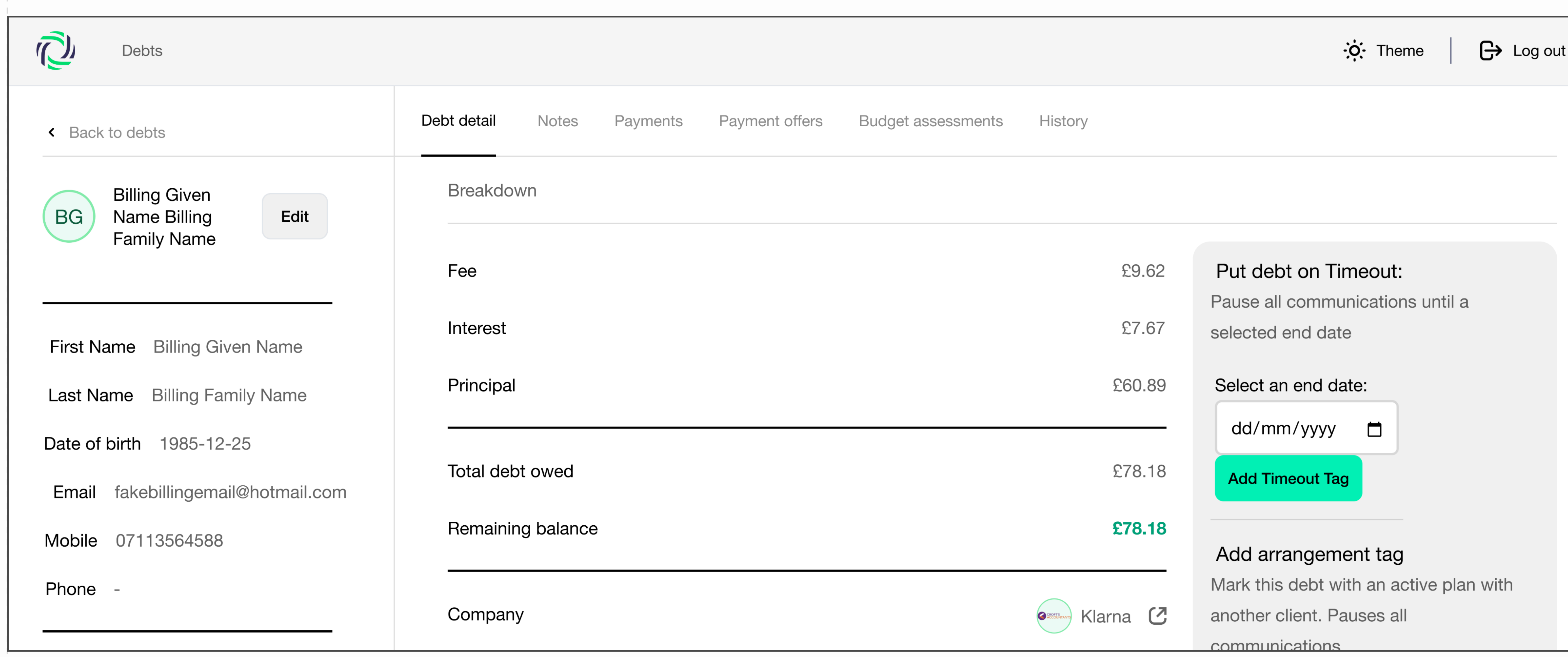
Understanding the problem

There were several glaring problems that needed to be addressed when setting out to work on this project, all of which provided different challenges. The existing CRM tool was severally outdated and not scalable in its current state. This lead to many questions the main one being,
where do we start?

Opportunities

In order to build a product that serves it users and that provides business value I had to consider what do we want to prioritise? To set a foundation for the product that could be rapidly iterated and built upon - which opportunities would provide the most value?

01. Baking in great UX The tool lacked basic UX, making simple tasks tedious and interactions frustrating.	02. A scalable system We have to build for scale, this requires speed. What does an MVP look across markets?
03. Integrating workflows We want to help Customer Ops users, streamlining their workflows and processes.	04. Thinking ahead Building with growth in mind, we want to integrate our AI tooling within our products.



Product objectives

For this project to be considered a success we need to meet several outcomes and provide a level of value to users and the business. I wanted to equip our teams with a modern tool to work smarter, maintain compliance, and deliver an excellent customer experience.

Scalability. Build for longevity, for not only new but existing features too.	Efficiency. Reduce workflow debt and maintenance time for our customer ops users.
Accessibility. Better information hierarchy, finding details and getting them what they need, fast.	Maturity. Provide a product experience that meet user expectations, enabling basic user interactions.

Approach

Process

As the lead for this project, I wanted outline the processes and steps I should take into account moving forward. This wasn’t set in stone, more so used as a guide when speaking with stakeholder and collaboration purposes.

Process

Discovery			Exploration	Feedback	Implementation
Benchmark current state • Audit current CRM • Discovery options • Formulating questions	Defining Problems • User ‘interview’ • Gathering insights	Reviewing the Problems • Grouping based on theme • Prioritising insights changes • Effort vs Impact of insights	Mature existing offering • Explore interaction improvements • Use of design system • Rapid iteration of IA/UI	Sharing changes and state of project with other • Testing with Ops • Sharing updates with stakeholders	Plan out with team lead what is feasible. • Phases of what we can get done • Reuse as much as we can • Work on the front-end for upskill

Discovery

Gaining Perspective

This initial research was to gain a general understanding of how this tool was being used. I conducted discovery sessions with Customer Ops to uncover themes, also shadowing when possible to see how the tool was used in day to day workflows.

? Where does the product fit into the users current workflows?

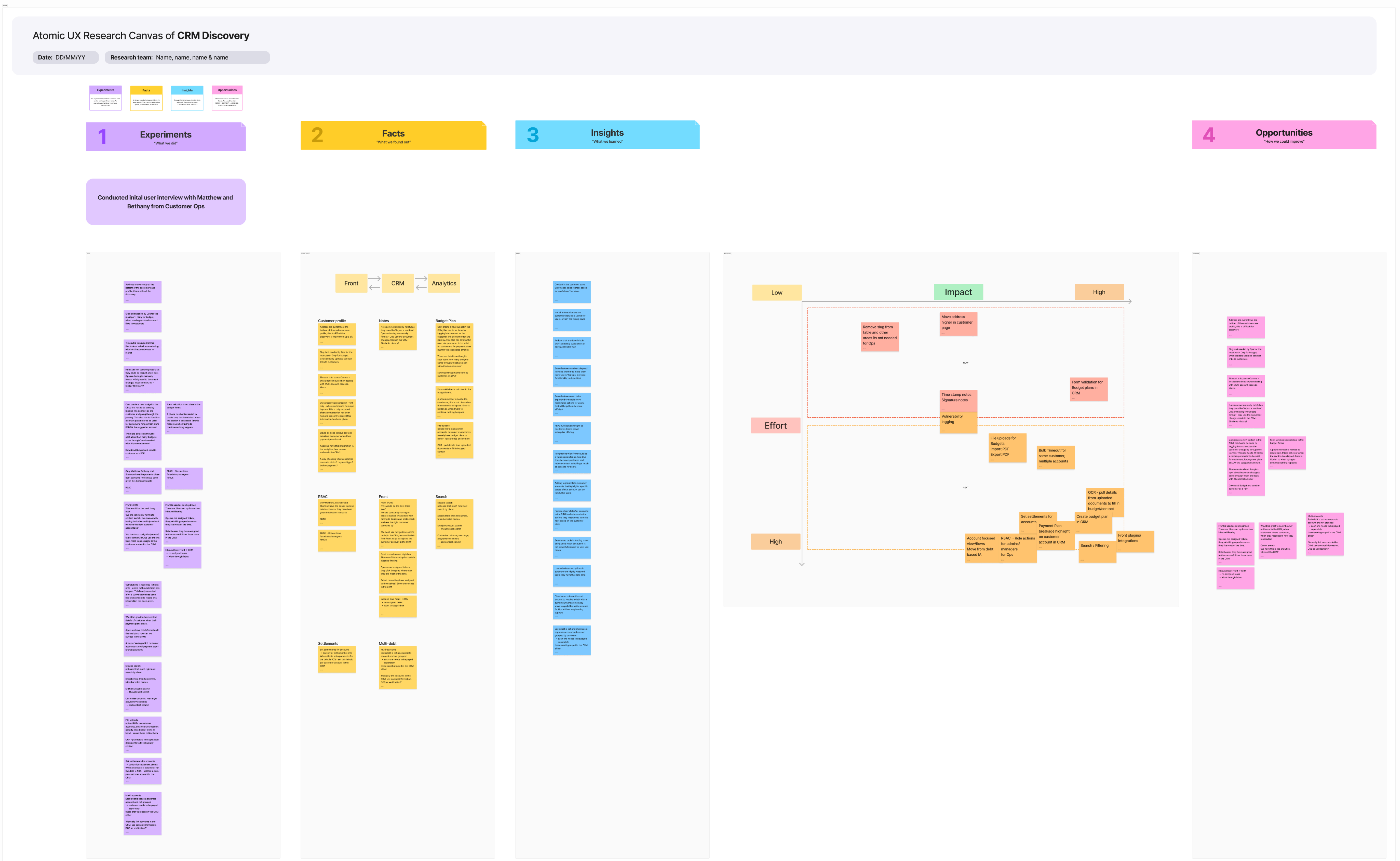
? What should the product do that it currently doesn’t?

? Why would this change improve their workflow?

? When are Ops users finding work-arounds for the product?

Lets audit

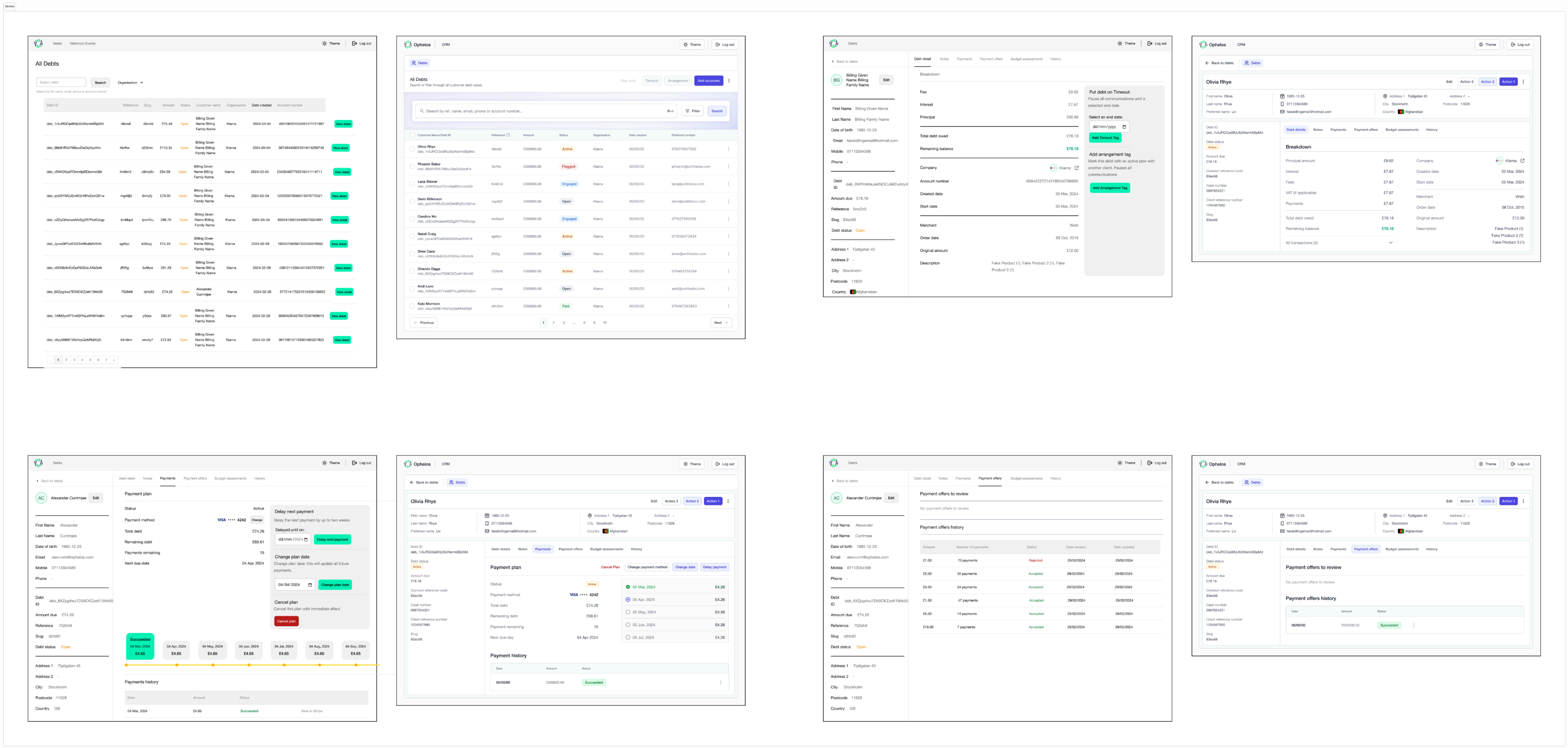
As well as the first hand research with Customer Ops users, I wanted to conduct a product audit of the CRM so we knew the extent of the usability issues, these insights were mapped to previous research to bolster the case to address these issues sooner rather than later



Exploration

Maturing the offering

Once the user needs and user types were defined, I set out to validate how they performed vs the existing offering. Using the new design system I had created that supports dashboard products, the reusable component library sped up the design process and allowed for rapid explorations to find the best info-hierarchy and meet the basic interaction expectations of a dashboard product.



Feedback

Pooling insights & Validating

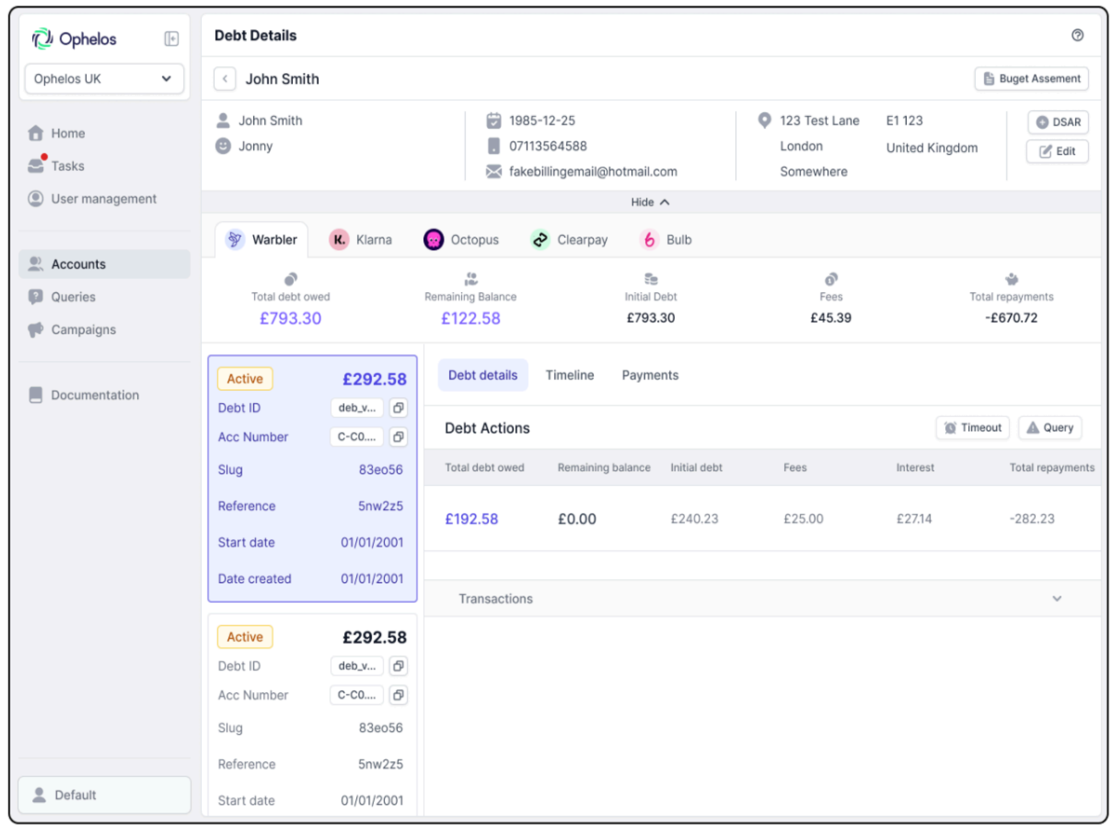
Gathering feedback throughout the iteration process was crucial to staying on track and making sure I was solving actual problems for our Customer Ops users. This constant feedback loop was shared with all teams and helped everyone stay on the same page, displaying the value this work brought and how it has shaped the direction of our product to meet our business goals of scaling into European markets.

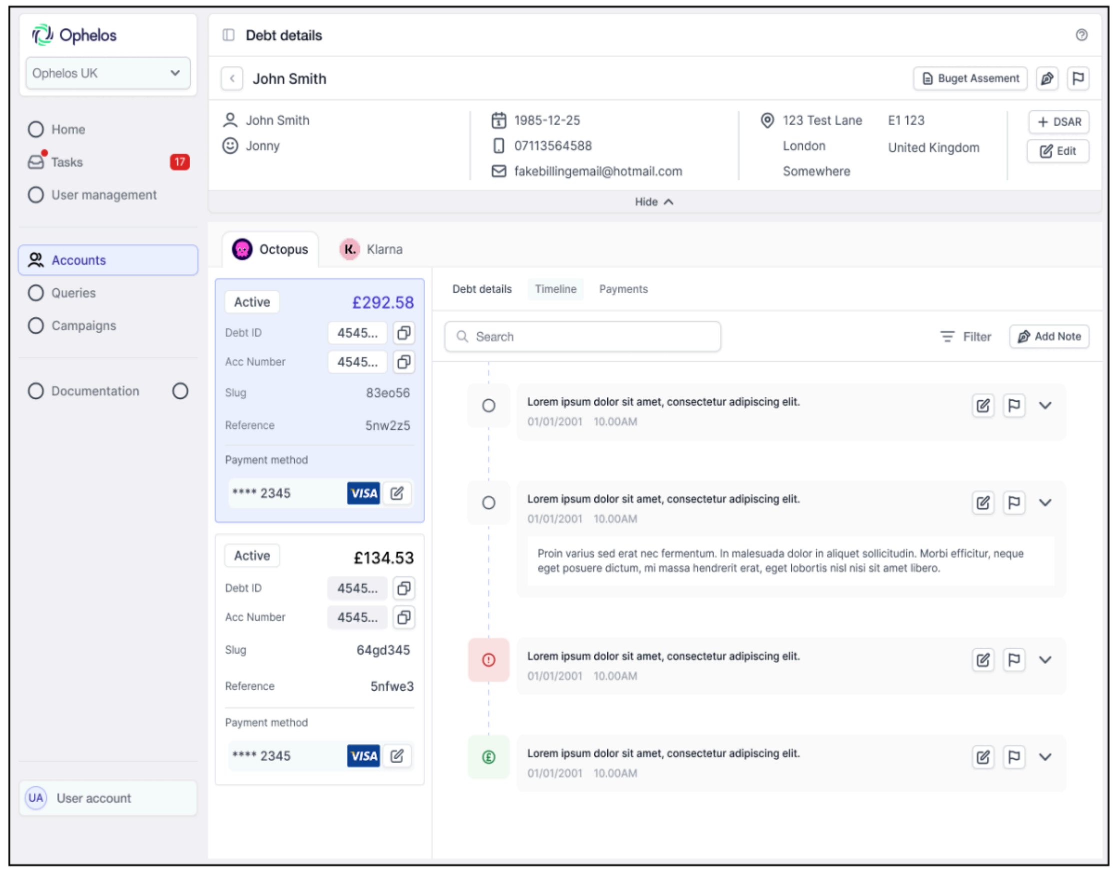
Would be good to have contact details of customer when their payment plans break.

Again we have this information in the analytics, how can we surface in the CRM?

A way of seeing which customer accounts states? payment type? broken payment?

RBAC - Role actions for admins/managers for ICs





File uploads
upload PDFs in customer accounts, customers sometimes already have budget plans to hand - reuse these or link them

OCR - pull details from uploaded documents to fill in budget/ contact

Vulnerability is record in Front only - where outbounds from ops happen. This is only recorded after a conversation has been had and consent to record this information has been given.

Set settlements for accounts
- button for settlement clients

When clients set a parameter for the debt ie 50% - set this in bulk, per customer account in the CRM

Only Matthew, Bethany and Shannon have the power to close debt accounts - they have been given this button manually

RBAC

Expand search
not used that much right now
search by client

Search more than two names, triple barrelled names

Multiple account search
- Thoughtspot search

Customise columns, rearrange, add/remove columns
- add contact column

Front x CRM
'This would be the best thing ever'
'We are constantly having to context switch, this comes with having to double and triple check we have the right customer accounts up'

'We don't use navigation(search/ table) in the CRM, we use the link from Front to go straight to the customer account in the CRM'

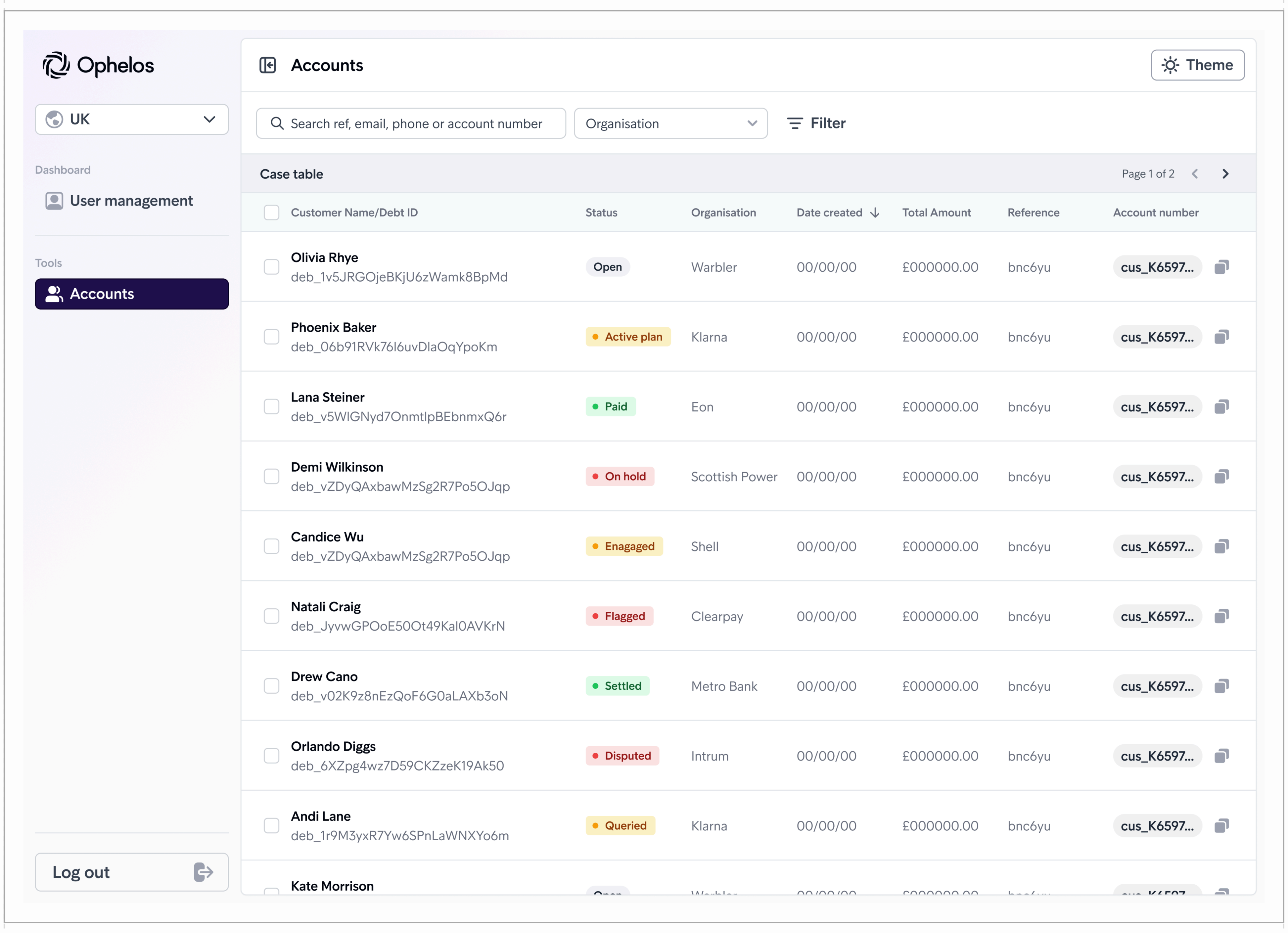
Improvements

Bringing value

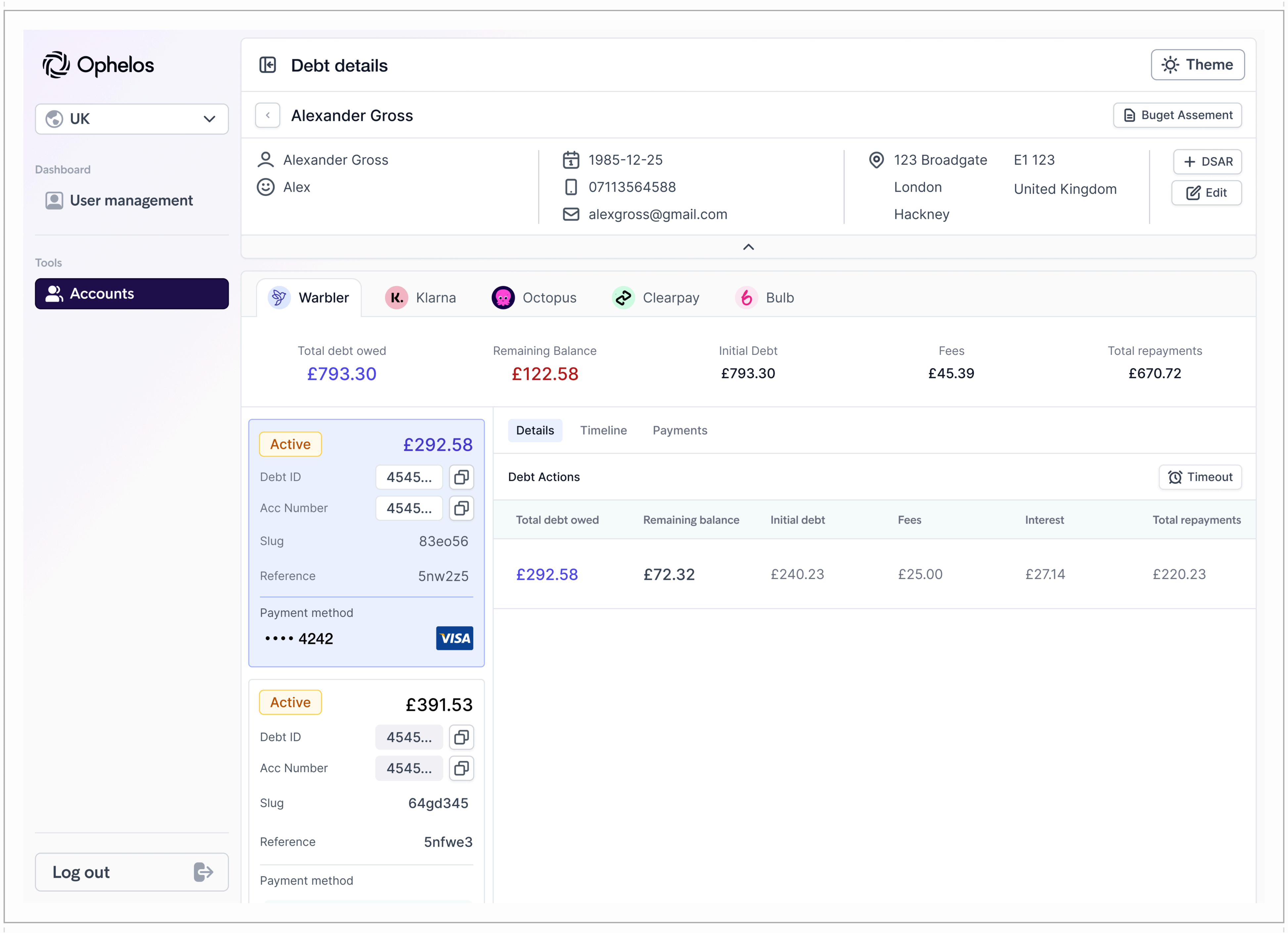
Reusing the existing product architecture, to keep dev effort low and user impact high, serving as the foundation that we mature. This allowed me to focus on the important things first, design and build in a lean way, reducing the chances of feature chasing to early.

The main improvements and features launched after prioritising and accessing the impact of the proposed changes I wanted to make were:

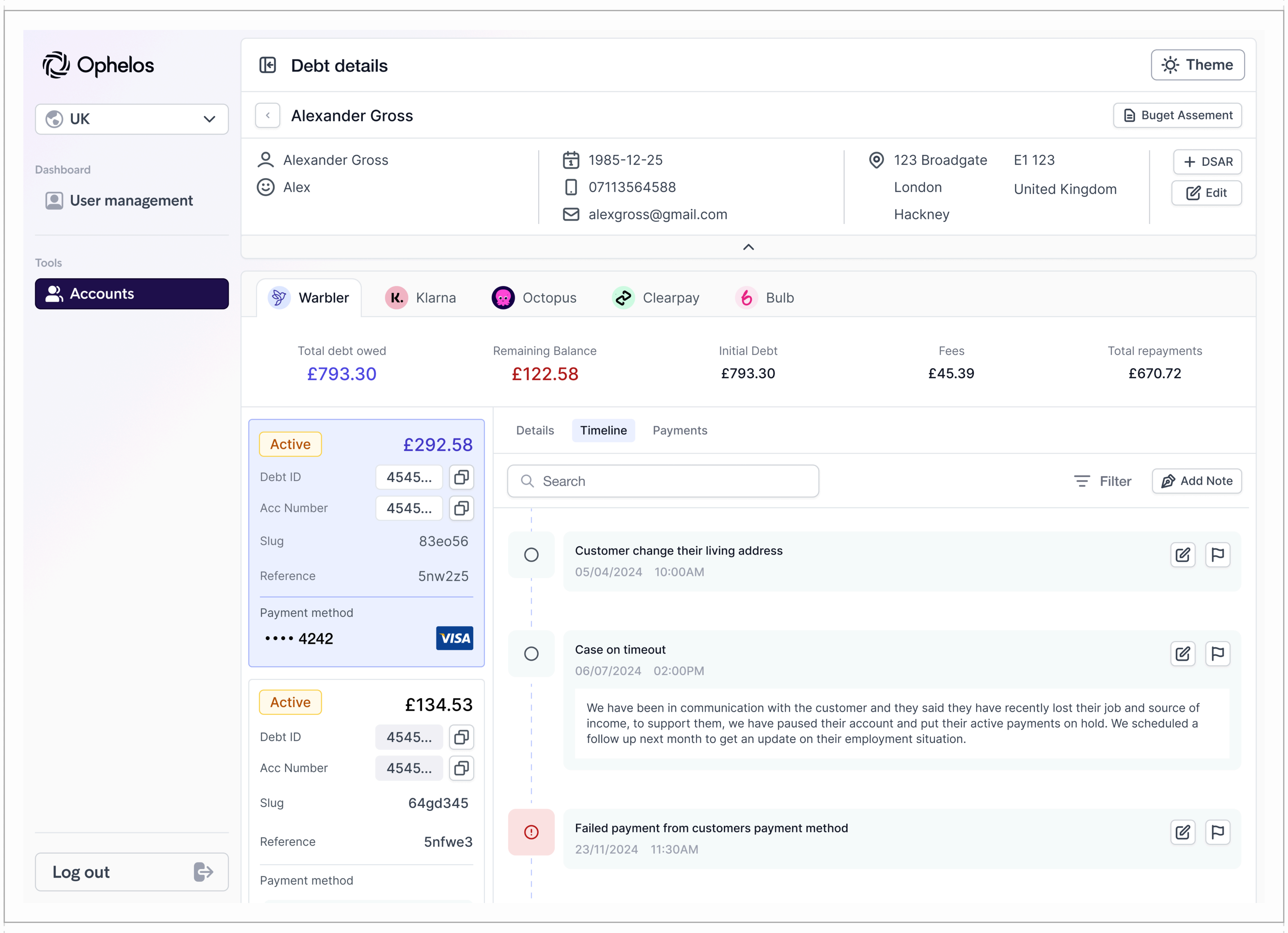
Overall improvements to IA and info hierarchy, placing content and information in more intuitive places and reusing common patterns to increase efficiency in workflows.



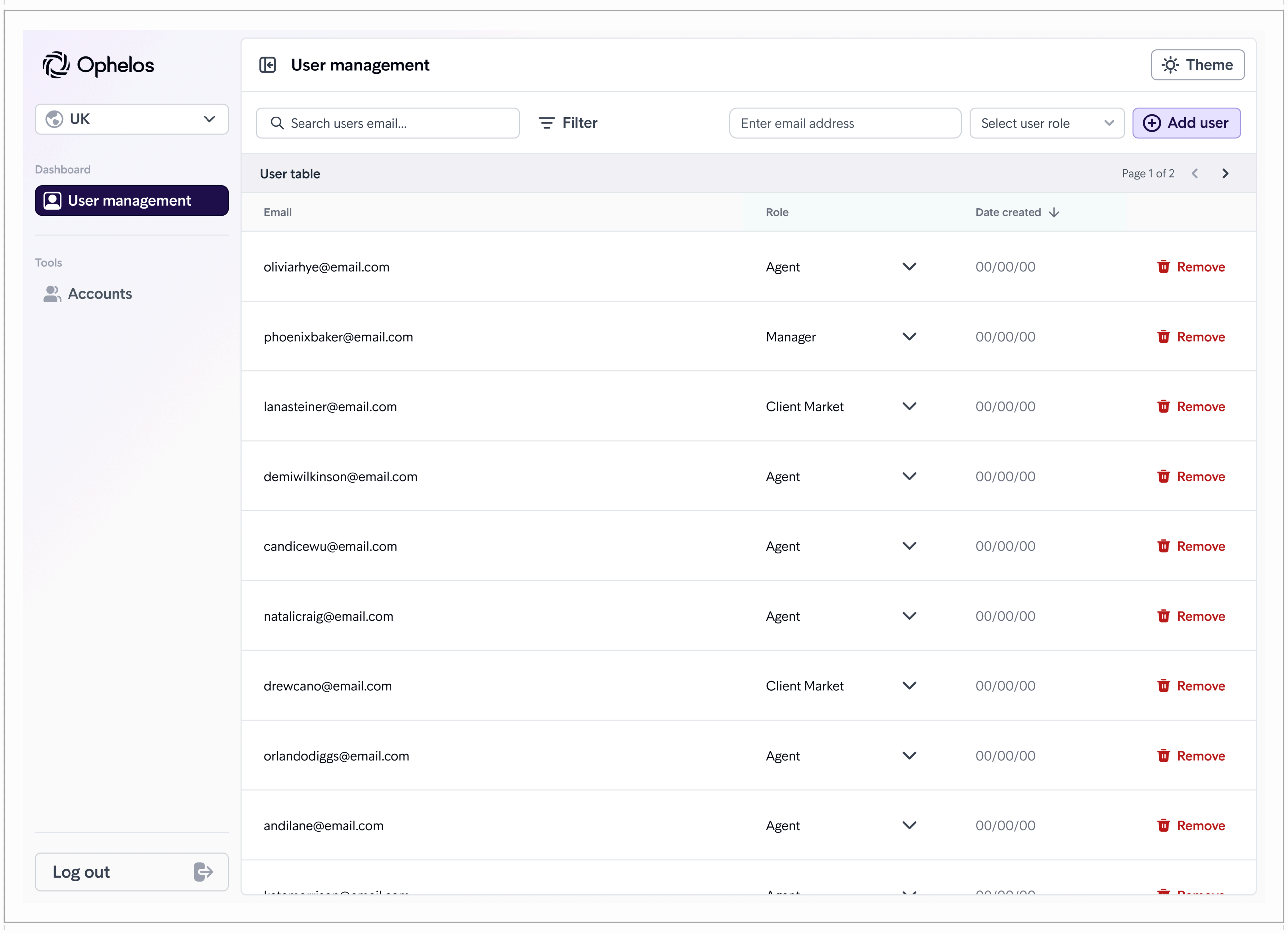
A multi-case view for customers accounts, showing all cases a customer has with us across clients in one place for Ops to access, reducing admin over-head.



A case timeline, this would show every event that happens in relation with a customers case so Ops agents have all of the context they need when providing support.



User management in platform, not only better onboarding for new Ops agents, but removing the need to request engineering team support to provide or revoke access to the platform.

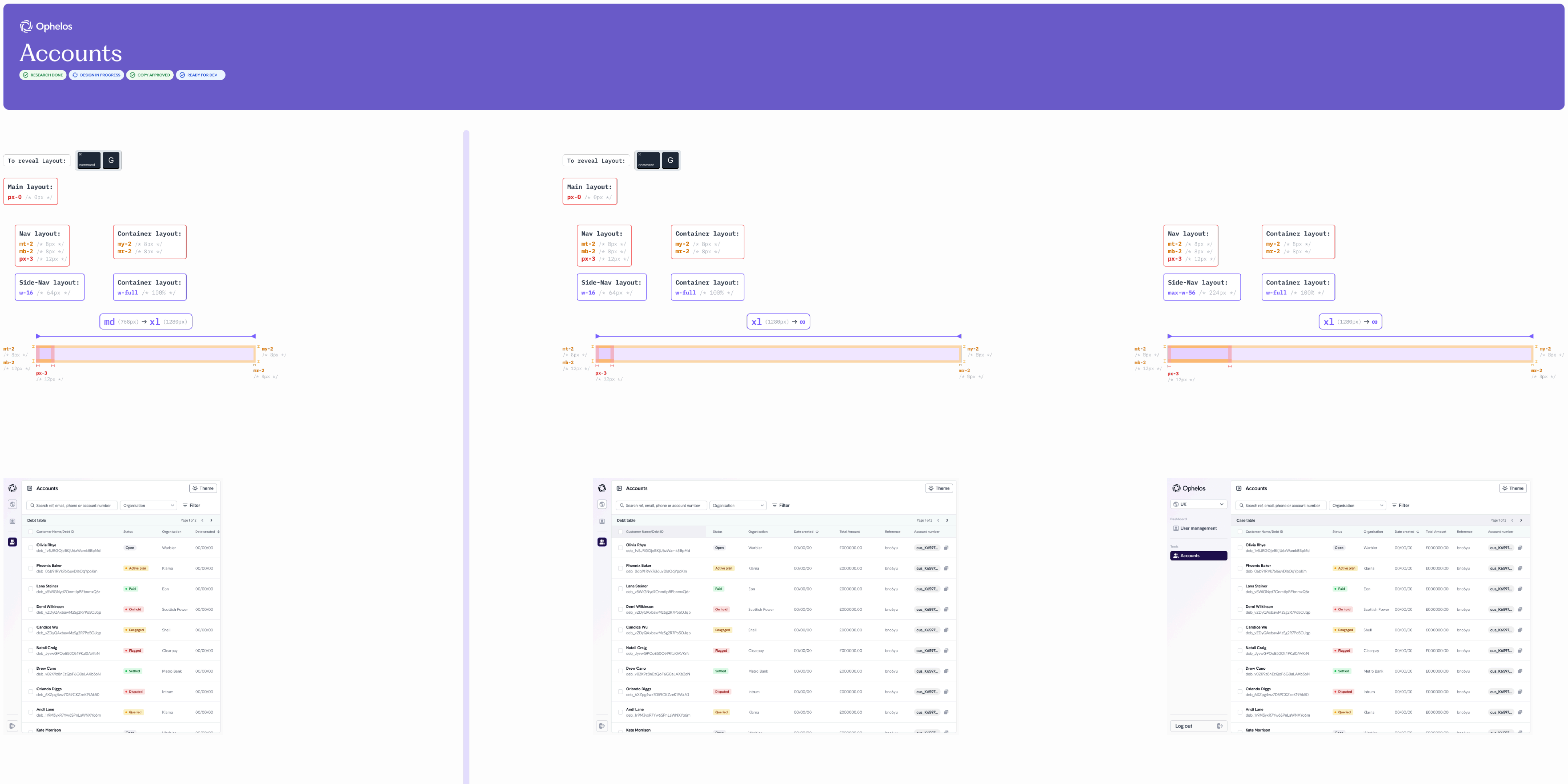


These were the key improvements that were introduced to the product as well as holistic UX improvements to UI components, all driven by data informed design decisions, user needs and business requirements - this was large step in the right direction to mature our product offering.

Implementation

Phases of improvement

Working closely with the engineer team lead, fleshing out tech requirements and being pragmatic about how we can get these features built. We set phases of work to ensure we met deadlines and showed progress at each milestone of the project, grouping work on themes so the team pulled in the same direction. I also worked on the front-end to make sure we delivered a polished UI with sharp interactions for our Ops users, maintaining our standards of design.



Conclusions

Reflections

This was a large project - it involved almost every aspect of product and design, across strategy and execution. Starting out, I bit of more than I could chew, the scope was too large, the scale put a dampener on any momentum because there were too many directions to go in. Taking a step back returning to the problem I was trying to solve helped me refocus on clear objectives that would provide value, grouping the quick wins together to get stakeholder buy-in.

Fail often, fail fast

A big take away from this project would be failing fast, early and often. Testing designs and getting feedback help me refine my designs to a point I was very confident about the direction the product needed to go in. This also helped when discussing the tech requirements and what we should think about moving into future iterations.