

Engage

01. Overview

Introduction

At Ophelos there’s a internal CRM tool which our Customer Ops team use to support our customers. This project was aimed to improve and update the design and functionality of this product software. With Engage, operations teams will have a centralised platform to manage and track our customers end-to-end. The aim is to reduce friction and improve ops workflows and become the sole platform for our customer management and support.

Case Study
6 min read

Role	Duration	Tools	Project Type
Product Design	6 Months	Figma	Product
Strategy		Figjam	Design System
Research		Cursor	
Front-end		Warp	

Context

This ‘Engage’ product is part of our broader product roadmap - with the goal of rolling out across multiple European markets, we need to provide a mature product offering to support our Customer ops users, product improvements and new feature requests.

02. 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 The existing CRM tool was severally outdated and not scalable in its current state.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 product users.

Accessibility.

Better information hierarchy, finding details what they need, fast.

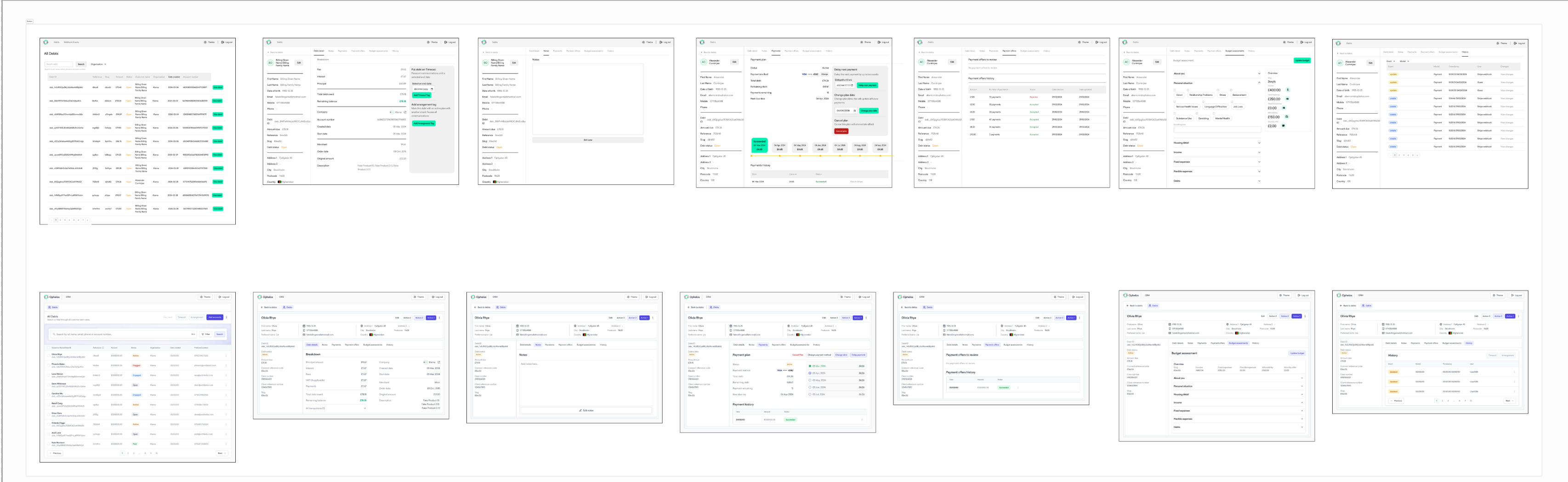
Maturity.

Provide a product experience that meet user expectations.

05. Exploration

Maturing the offering

Once the IA and user groups were defined, I set out to validate how they performed vs the old one. Using the new design system I had created that supports dashboard b2b 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.

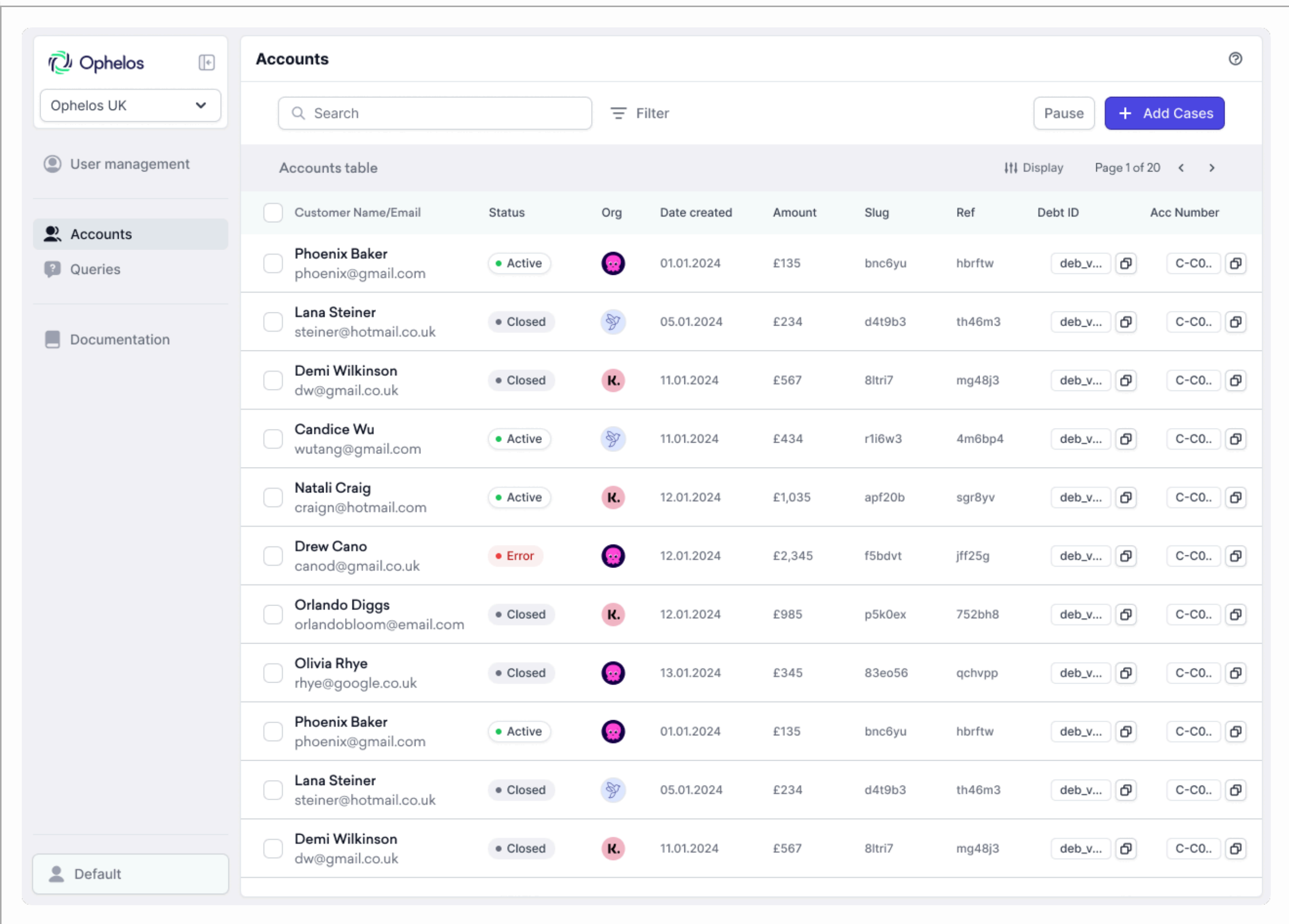


Reusing the existing product architecture, to keep dev effort low and user impact high, serving as the foundation that we mature. Allowing us to focus on the important things first, design and build in a lean way and reducing the chances of feature chasing

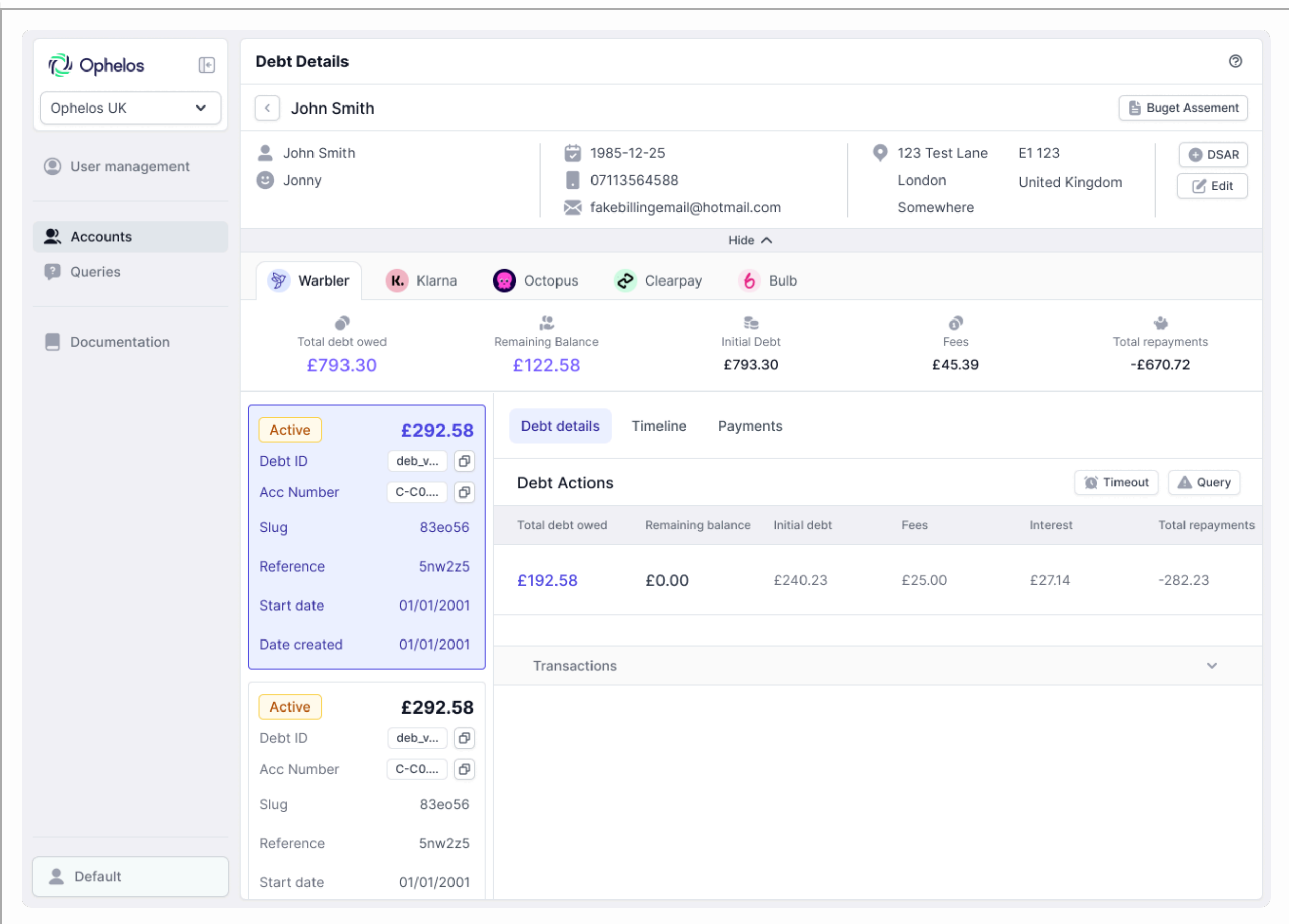
Bringing value

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

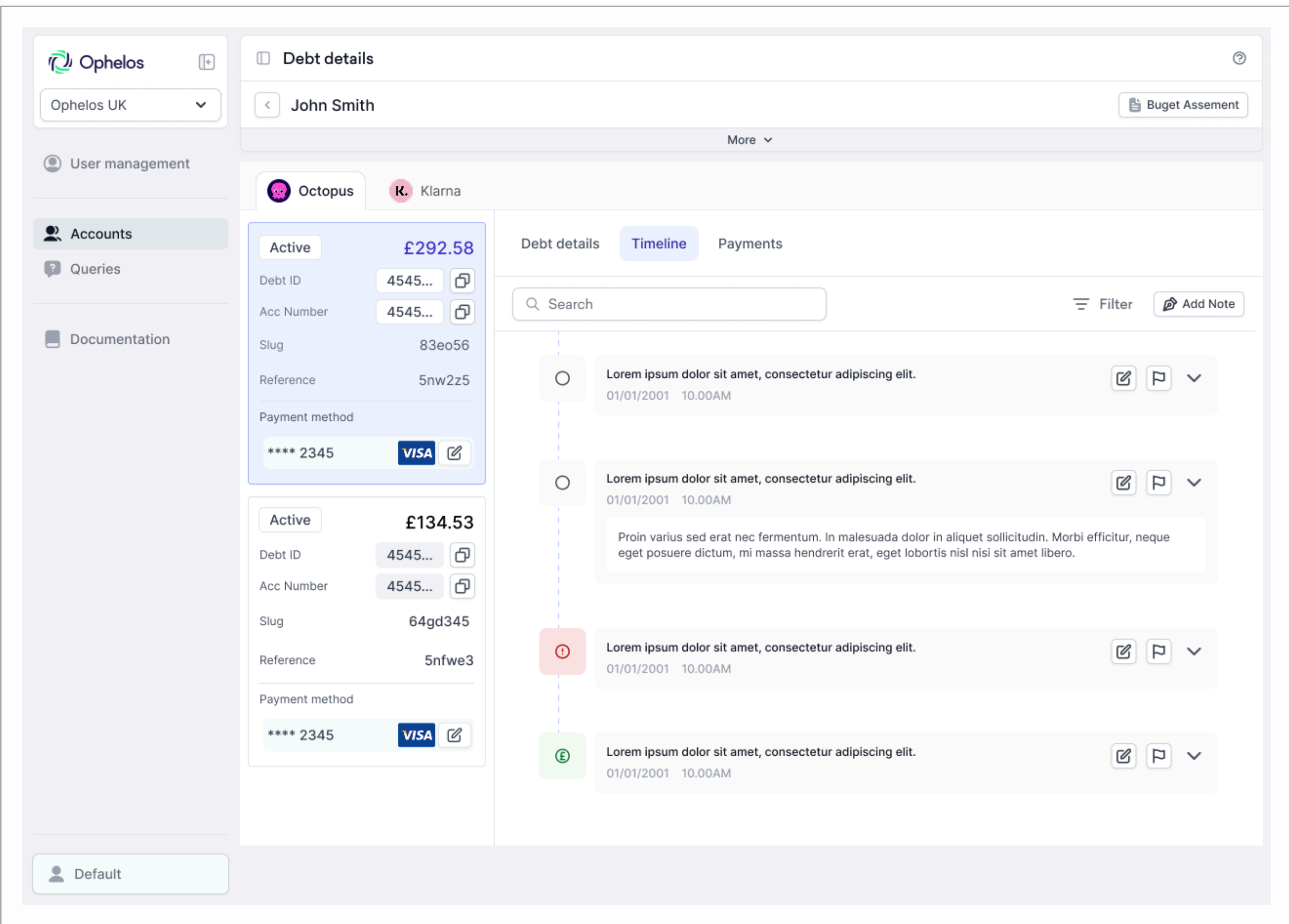
Overall improvements to IA and info hierarchy, placing content and information in more intuitive places and reusing common patterns to increase efficiency in workflows.



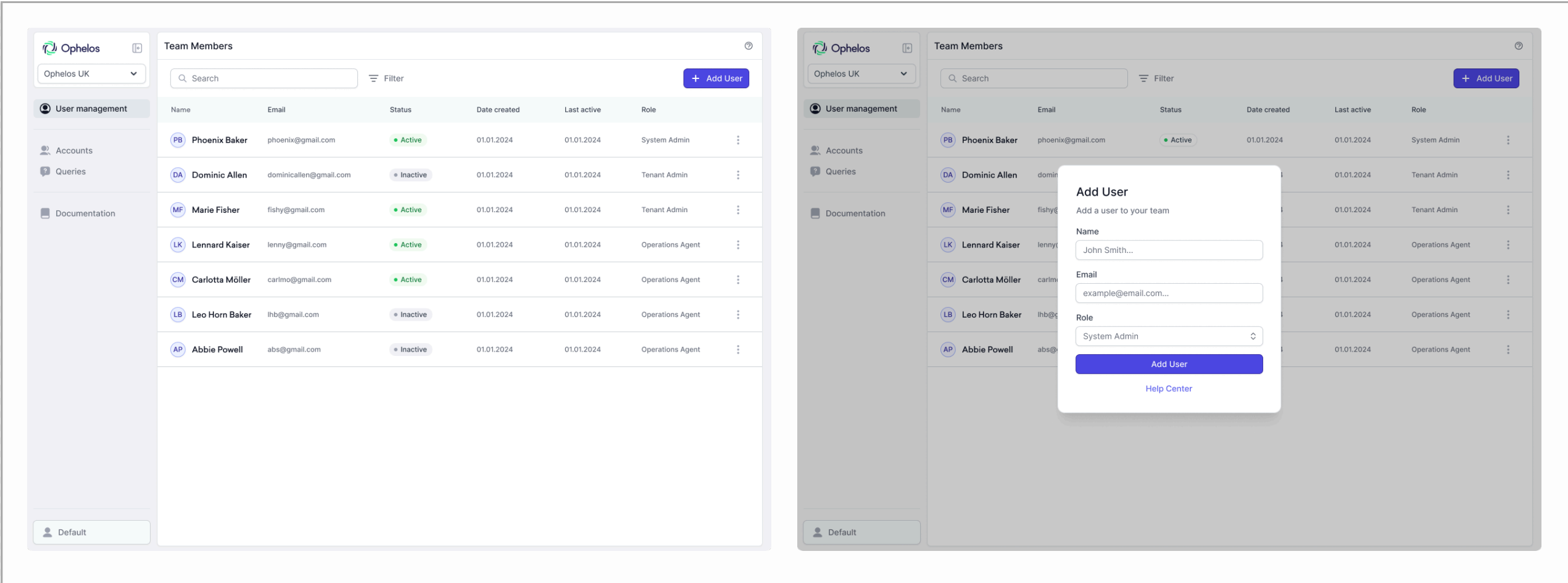
A multi-case view for customers accounts, showing all cases a customer has with us across clients in one place for Ops to access, reducing admin over-head.



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 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 driven design decisions and user needs and business requirements - this was large step in the right direction to mature our product offering.

06. Feedback

Pooling insights

Gathering feedback throughout my time working on this project 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, seeing the value this work brought and how it has shaped the direction of our product to meet our business goals of expanding 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?

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

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

All Debts

Search debt

Search

Organisation

Search by ref, name, email, phone or account number

Debt ID	Reference	Slug	Amount	Status	Customer name	Organisation	Date created	Account number	
deb_hLdRQCy8KJL6wWem4B8yAd	rfkcaB	d4xvbl	£75.40	Open	Billing Given Name Billing Family Name	Klarna	2024-03-04	480708075042547172897	View Debt
deb_5d6PRVx766uChvCpfpokn	hufwe	d3denn	£113.34	Open	Billing Given Name Billing Family Name	Klarna	2024-03-04	56784408223014036250749	View Debt
deb_vdWQhYpDChmtyB8nmvGdr	th4dn3	chmpdv	£94.59	Open	Billing Given Name Billing Family Name	Klarna	2024-03-04	234304807763364115471	View Debt
deb_gp63YYWDJEuWQnNtE3uG6fw	mg48j3	Ohufy	£79.90	Open	Billing Given Name Billing Family Name	Klarna	2024-03-04	10059007856607930775321	View Debt
deb_vZDyGa4uawM6p2R7p5GJ3p	4ndtp4	tpmthw	£86.76	Open	Billing Given Name Billing Family Name	Klarna	2024-03-04	6503493354448070204881	View Debt
deb_jyvwGPQeEOCH4KdAVuN	sgRlyv	k58oj5	£74.23	Open	Billing Given Name Billing Family Name	Klarna	2024-02-29	19203704266730204638992	View Debt
deb_vd2K7h8E6GufAGG6uAK3u3uN	j7D5g	5uRlyw	£81.28	Open	Billing Given Name Billing Family Name	Klarna	2024-03-29	4397270304453627372051	View Debt
deb_vXZpgr4w7C6PCKZuW7R6ASD	752u48	d9h482	£74.26	Open	Alexander Currinjee	Klarna	2024-02-28	577247952270164268256693	View Debt
deb_vYRv3y4877u6SPH4uWuN7u6dm	qchopp	yDp3w	£95.57	Open	Billing Given Name Billing Family Name	Klarna	2024-03-28	6035428542704729476209075	View Debt
deb_vRy5BBETWhtyG6uR5uXGJA	bfnrfur	cm5y7	£72.83	Open	Billing Given Name Billing Family Name	Klarna	2024-02-28	36179810722301680227823	View Debt

1

2

3

4

5

6

7

Expand search

not used that much right now

search by client

Search more than two names, triple barreled 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'

RBAC - Role actions for admins/managers for ICs

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.

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.

[illegible]

08. Conclusions

Reflections

This was a large project - it involved almost every aspect of product and design, across strategy and execution. Starting out I bite 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.

Accounts

Theme

Search ref, email, phone or account number

Organisation

Filter

Case table

Page 1 of 2

<input type="checkbox"/>	Customer Name/Debt ID	Status	Organisation	Date created ↓	Total Amount	Reference	Account number
<input type="checkbox"/>	Olivia Rhye deb_1v5JRGOjeBKjU6zWamk8BpMd	Open	Warbler	00/00/00	£000000.00	bnc6yu	cus_K6597...
<input type="checkbox"/>	Phoenix Baker deb_06b91RVk76l6uvDlaOqYpoKm	Label	Klarna	00/00/00	£000000.00	bnc6yu	cus_K6597...
<input type="checkbox"/>	Lana Steiner deb_v5WIGNyd7OnmtlpBEbnmxQ6r	Label	Eon	00/00/00	£000000.00	bnc6yu	cus_K6597...
<input type="checkbox"/>	Demi Wilkinson deb_vZDyQAxhawMzSg2R7Po5OJqp	Label	Scottish Power	00/00/00	£000000.00	bnc6yu	cus_K6597...
<input type="checkbox"/>	Candice Wu	Label	Shell	00/00/00	£000000.00	bnc6yu	cus_K6597...