dvt design

ASSUPOL
Sales Journey

The sales experience across the organisation needed to change (online client self service, face to face and contact centre sales). The overall experience was completely broken and each channel had its own standards and way of working.

From the brief, it was clear that the scope and impact on the business was huge. The problem was not very well understood, however the business knew that something had to change. We wanted to create a seamless sales experience across three different channels. The channels included:
- online sales (website)
- face to face sales
- call centre sales.

The challenge was that each channel was distinctly different in the way that they sold. Each channel differed in terms of:
- the products sold,
- their target audience,
- and how they sold.

Project Summary

How might we make it easier to sell Assupol products (Improve F2F quote accuracy, sales and fulfil- ment experience), that the current process is slow, completely manual and prone to errors.

Design Process

Through some initial interactions with some of the stakeholders, we soon realised that the problem was not very well understood holistically. Each stakeholder had a different idea as to what the issues was and how a potential solution would work. The double diamond immediately came to mind ito focusing on the what first and subsequently the how. We often use the double diamond approach to problem solving in conjunction with other methods, depending on the client needs.

We put together a pack of slides in order to communicate and explain our process and how we (as UX) would be able to assist in:
1. understanding the problem
2. coming up with potential solutions 3. aligning the stakeholders around a singular vision

Responsibilities

DVT's senior UX/UI designer role was on the project was to:
- understand the client / user and their ecosystems
- uncover and analyse the business and user needs
- ensure that we create designs that standardise and align the different channels, yet address the individual channel needs.

Methodology

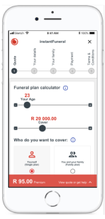
We used a variety of additional methods / artefacts borrowed from other disciplines:
- Observations & interviews (Persona and User Journey mapping)
- Lean startup (Business model canvas and customer value proposition canvas)
- Co-Design sessions - Wireframing
- Prototyping
- Usability testing

Customer Value Proposition Canvas

Business Model Canvas

Wireframes & Prototype

We created a library of design components (symbols) together with the front end development team and split up the design work according to different channels. Each channel design used common components allowing us to standardise across channels, yet allowing each designer to address their channels unique requirements. We created prototypes to illustrate how the design would solve the specific problems for each area as well as integration that was needed between areas.



We discovered in the problem definition phase that the majority of online / self service clients were mobile users and younger individuals (based on analytics). Based on this insight, we initially only designed the mobile version of the site. After vetting and approving the mobile site, we then designed the full web version of the site.

We discovered in the problem definition phase that the face to face sales representatives primarily sell whilst visiting clients at various locations around the country. They had a very strong need for mobility as they very rarely had access to a desk when conducting a sale.

The could possibly be standing in a store and selling to clients that are waiting in a queue. Also, due to a high level of fraudulent sales, the business wanted to be able to track sales activity via location and physical presence of a sales representative and a client. Based on the insights, a tablet and associated UI was the best possible choice at the time.

Prototype

Our designs incorporated elements to address specific user needs whilst still aligning to the overall design language. Through observations, interviews and co-designs sessions, we were ale to identify many additional issues in addition to the original project scope and brief. This allowed the project team to plan and to make more informed decisions. The co-design sessions were instrumental in aligning the project team and project stakeholders to a single, coherent vision. This allowed us to complete designs in less time and to remove ambiguity from the overall design process.