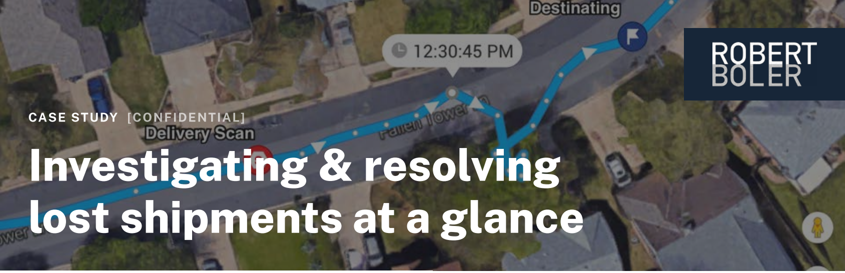

Destinating
12:30:45 PM
Delivery Scan
Fallen Tower

ROBERT
BOLER

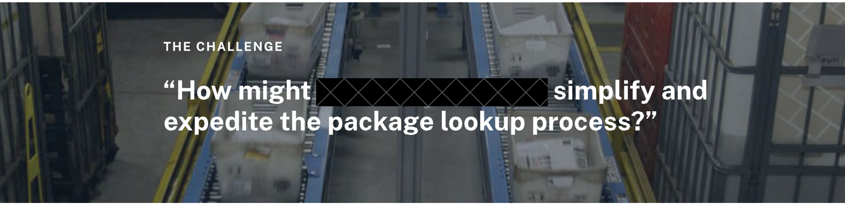
CASE STUDY [CONFIDENTIAL]

Investigating & resolving lost shipments at a glance

Unifying features from seven disparate systems to create a better employee experience, cut resolution times in half, and launch a predictive triage algorithm

Note: Details of this case study removed and visual fidelity kept low for client privacy. Contact me for more on this and other projects.

CLIENT	[redacted]
ROLES	interaction designer, information architect, content designer, user test facilitator
TIMEFRAME	6 mos. total, full-time
TRAITS	web app // logistics // employee UX



THE CHALLENGE

“How might [redacted] simplify and expedite the package lookup process?”

PROBLEM

“Where is my package?”

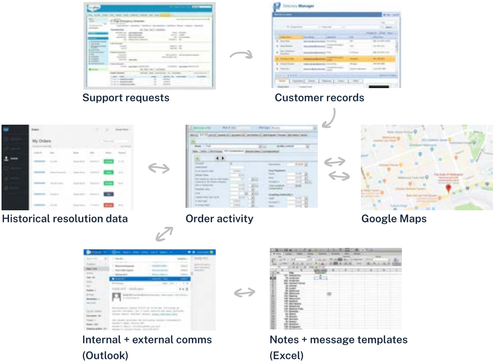
98% of the time, [redacted] customers don’t have to ask this question. But sometimes one of their many orders gets lost or misdirected, leading to customer frustration added workload.

$3 billion
lost to churn per year

4 days
avg. time to resolution

40%
of business reps’ workload

7
disparate tools


Support requests
Customer records
Historical resolution data
Order activity
Google Maps
Internal + external comms (Outlook)
Notes + message templates (Excel)

Our mission: to cut down resolution time, improve their employee experience, and become more proactive in addressing lost or late shipments.

RESEARCH

Life in the swivel-chair

A portion of our team flew to two user worksites to:

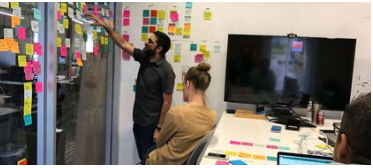
- observe their physical work environment,
- note the software tools (and any other tools) they use,
- conduct individual user interviews, and
- test a concept drafted by the prior Discovery phase of work.

[redacted]

Interviewing users in-person, one-on-one proved valuable in subtle ways. We were able to notice hesitation at certain questions, and power dynamics around certain metrics, behaviors or, other teams in the organization. This tool had the possibility to lower walls between different parts of the company.

APPROACH

Surface the right data at the right time

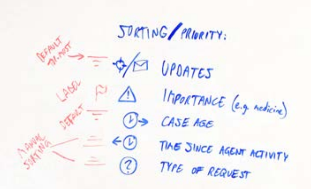


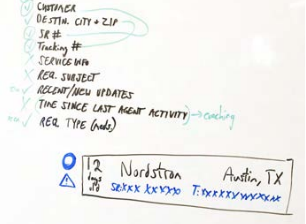
Once we'd synthesized our research and pulled out some key insights, we started identifying opportunities and potential:

- Laid out the seven legacy systems they currently use side-by-side to compare data and construct the story of a given problematic package

- Took note of how they communicate with their customers and asked how they wish they could

- Plotted the many different types of data (agent notes, customer communications, location data, images, facility information, order details, customer details, and more) along a single axis that best helped the investigative process: time. A "Facebook timeline" for a shipment.

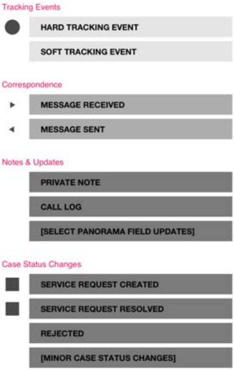

SORTING/PRIORITY:
DEFAULT TO MOST
UPDATES
LABEL
IMPORTANCE (e.g. medicine)
DEFAULT
CASE AGE
MANUAL SORTING
TIME SINCE AGENT ACTIVITY
TYPE OF REQUEST

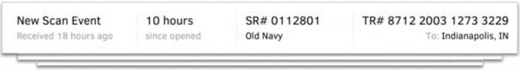

CUSTOMER
DESTIN. CITY + ZIP
SR #
Tracking #
SERVICE INFO
REQ. SUBJECT
RECENT/NEW UPDATES
TIME SINCE LAST AGENT ACTIVITY
caching
REQ. TYPE (tools)
12 days old
Nordstrom
Austin, TX
SR:XXX XXXXX
T:XXXXXXXXXXX

- Shaved off irrelevant or cryptic order information from legacy systems, while making details accessible with a single click

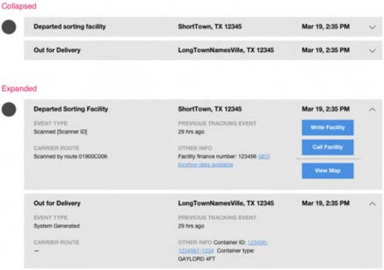
- Worked with our developers to construct a predictive algorithm based on historical data, and designed the presentation of that data to point the agent in a helpful direction without being intimidating or implying false accuracy

Starting with content architecture


Tracking Events
HARD TRACKING EVENT
SOFT TRACKING EVENT
Correspondence
MESSAGE RECEIVED
MESSAGE SENT
Notes & Updates
PRIVATE NOTE
CALL LOG
[SELECT PANORAMA FIELD UPDATES]
Case Status Changes
SERVICE REQUEST CREATED
SERVICE REQUEST RESOLVED
REJECTED
[MINOR CASE STATUS CHANGES]



New Scan Event	10 hours	SR# 0112801	TR# 8712 2003 1273 3229
Received 18 hours ago	since opened	Old Navy	To: Indianapolis, IN



Collapsed

Departed sorting facility	ShortTown, TX 12345	Mar 19, 2:35 PM
Out for Delivery	LongTownNamesVille, TX 12345	Mar 19, 2:35 PM

Expanded

Departed Sorting Facility — ShortTown, TX 12345 — Mar 19, 2:35 PM

EVENT TYPE
Scanned [Scanner ID]

CARRIER ROUTE
Scanned by route 01900C006

PREVIOUS TRACKING EVENT
29 hrs ago

OTHER INFO
Facility finance number: 123456 GEO location data available

Out for Delivery — LongTownNamesVille, TX 12345 — Mar 19, 2:35 PM

EVENT TYPE
System Generated

CARRIER ROUTE
—

PREVIOUS TRACKING EVENT
29 hrs ago

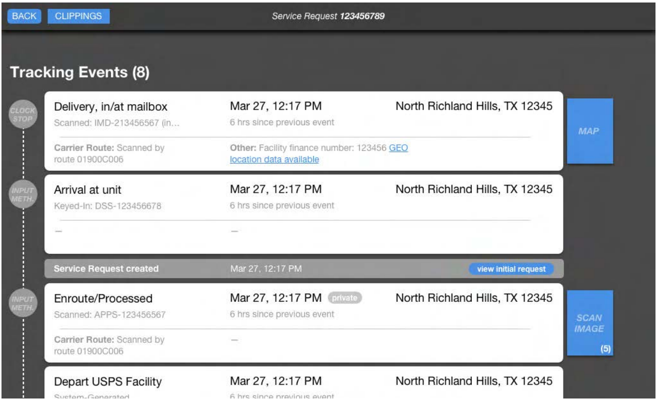
OTHER INFO Container ID: 123456-1234567-1234 Container type: GAYLORD 4FT

Write Facility
Call Facility
View Map

ITERATIONS

From sketches, to wires, to screens

User-defined case prioritization


BACK
CLIPPINGS
CLOCK STOP
INPUT METH.
INPUT METH.
MAP
SCAN IMAGE (5)
view initial request
private

Service Request ***123456789***

Tracking Events (8)

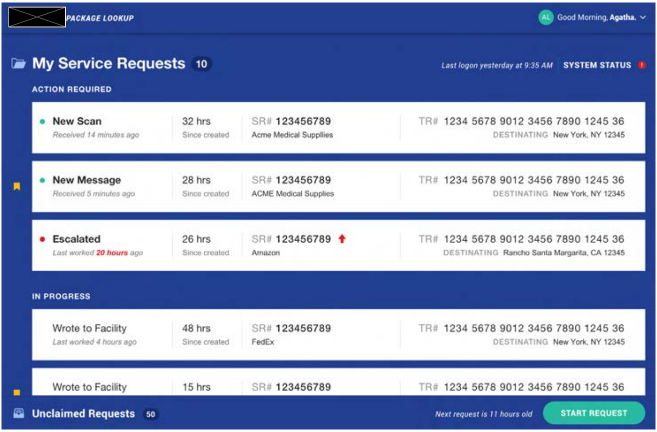
Delivery, in/at mailbox — Mar 27, 12:17 PM — North Richland Hills, TX 12345
Scanned: IMD-213456567 (in... — 6 hrs since previous event
Carrier Route: Scanned by route 01900C006 — **Other:** Facility finance number: 123456 GEO location data available

Arrival at unit — Mar 27, 12:17 PM — North Richland Hills, TX 12345
Keyed-In: DSS-123456678 — 6 hrs since previous event
— —

Service Request created — Mar 27, 12:17 PM

Enroute/Processed — Mar 27, 12:17 PM — North Richland Hills, TX 12345
Scanned: APPS-123456567 — 6 hrs since previous event
Carrier Route: Scanned by route 01900C006 — —

Depart USPS Facility — Mar 27, 12:17 PM — North Richland Hills, TX 12345
System-Generated — 6 hrs since previous event


PACKAGE LOOKUP
AL
START REQUEST

Good Morning, **Agatha.**

My Service Requests 10

Last logon yesterday at 9:35 AM **SYSTEM STATUS**

ACTION REQUIRED

New Scan *Received 14 minutes ago*	32 hrs Since created	SR# **123456789** Acme Medical Supplies	TR# 1234 5678 9012 3456 7890 1245 36 DESTINATING New York, NY 12345
New Message *Received 5 minutes ago*	28 hrs Since created	SR# **123456789** ACME Medical Supplies	TR# 1234 5678 9012 3456 7890 1245 36 DESTINATING New York, NY 12345
Escalated *Last worked* ***20 hours*** *ago*	26 hrs Since created	SR# **123456789** ↑ Amazon	TR# 1234 5678 9012 3456 7890 1245 36 DESTINATING Rancho Santa Margarita, CA 12345

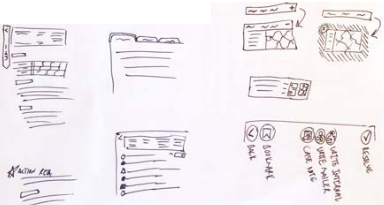
IN PROGRESS

Wrote to Facility *Last worked 4 hours ago*	48 hrs Since created	SR# **123456789** FedEx	TR# 1234 5678 9012 3456 7890 1245 36 DESTINATING New York, NY 12345
Wrote to Facility	15 hrs	SR# **123456789**	TR# 1234 5678 9012 3456 7890 1245 36

Unclaimed Requests 50

Next request is 11 hours old

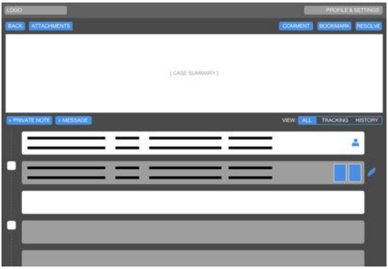
Organizing case updates on a timeline

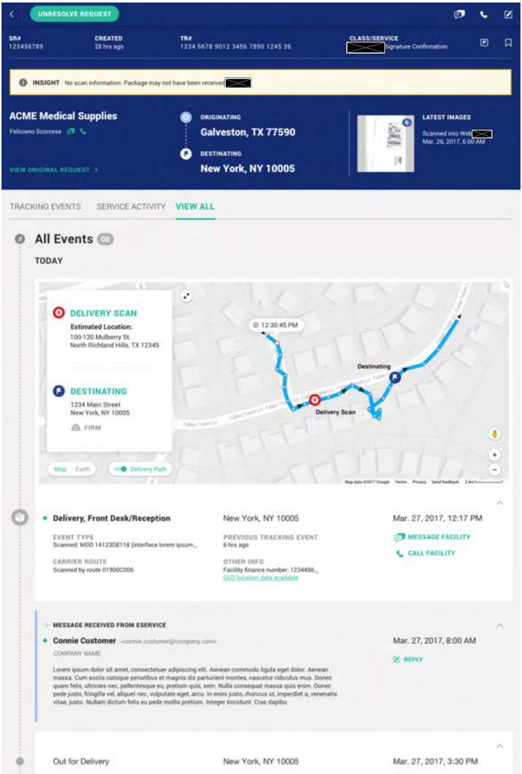

ACTION REQ
BACK
BOOKMARK
CASE MSG
WRITE MAILER
WRITE INTERNAL
RESOLVE

"Contact info"

All Events
Tracking Events
Case History

1 new tracking event, 2 new messages


LOGO
PROFILE & SETTINGS
BACK
ATTACHMENTS
COMMENT
BOOKMARK
RESOLVE
[CASE SUMMARY]
+ PRIVATE NOTE
+ MESSAGE
VIEW:
ALL
TRACKING
HISTORY


UNRESOLVE REQUEST
TRACKING EVENTS
SERVICE ACTIVITY
VIEW ALL
Map
Earth
Delivery Path
12:30:45 PM
Destinating
Delivery Scan
MESSAGE FACILITY
CALL FACILITY
REPLY
VIEW ORIGINAL REQUEST ›

SR# 123456789

CREATED 28 hrs ago

TR# 1234 5678 9012 3456 7890 1245 36

CLASS/SERVICE [redacted] Signature Confirmation

INSIGHT No scan information. Package may not have been received [redacted]

ACME Medical Supplies

Feliciano Scorcese

ORIGINATING Galveston, TX 77590

DESTINATING New York, NY 10005

LATEST IMAGES

Scanned into Web [redacted]
Mar. 26, 2017, 6:00 AM

All Events 08

TODAY

DELIVERY SCAN

Estimated Location:
100-120 Mulberry St.
North Richland Hills, TX 12345

DESTINATING

1234 Main Street
New York, NY 10005

FIRM

Delivery, Front Desk/Reception	New York, NY 10005	Mar. 27, 2017, 12:17 PM
EVENT TYPE Scanned: MDD 1412308118 (interface lorem ipsum...	PREVIOUS TRACKING EVENT 6 hrs ago	
CARRIER ROUTE Scanned by route 01900C006	OTHER INFO Facility finance number: 1234456... GEO location data available	

MESSAGE RECEIVED FROM ESERVICE

Connie Customer <connie.customer@company.com> — Mar. 27, 2017, 8:00 AM

COMPANY NAME

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibu

Out for Delivery — New York, NY 10005 — Mar. 27, 2017, 3:30 PM

Communcations

Case overview

Predictive insight

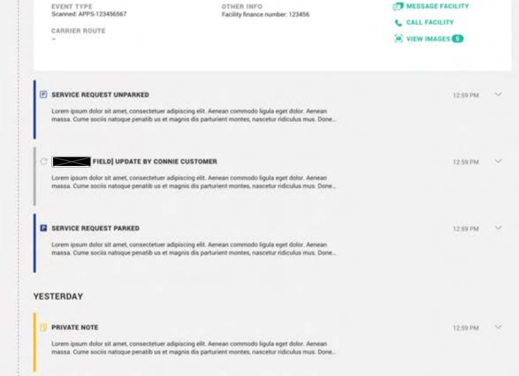
Timeline view controls

Delivery map

Delivery scan details

Customer message

Scan event



EVENT TYPE
Scanned: APPS-123456567

OTHER INFO
Facility finance number: 123456

CARRIER ROUTE
–

MESSAGE FACILITY
CALL FACILITY
VIEW IMAGES 5

SERVICE REQUEST UNPARKED 12:59 PM

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cume sociis natoque penatib us et magnis dis parturient montes, nascetur ridiculus mus. Done...

[redacted] **FIELD] UPDATE BY CONNIE CUSTOMER** 12:59 PM

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cume sociis natoque penatib us et magnis dis parturient montes, nascetur ridiculus mus. Done...

SERVICE REQUEST PARKED 12:59 PM

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cume sociis natoque penatib us et magnis dis parturient montes, nascetur ridiculus mus. Done...

YESTERDAY

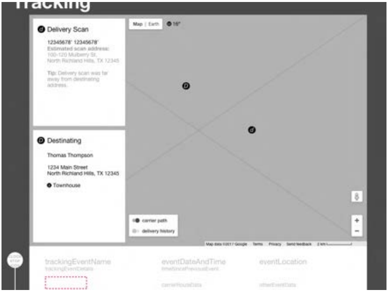
PRIVATE NOTE 12:59 PM

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cume sociis natoque penatib us et magnis dis parturient montes, nascetur ridiculus mus. Done...

Case status change

Internal case notes

Providing inline map & image media



Tracking
Map | Earth
16"

Delivery Scan

12345678' 12345678'
Estimated scan address:
100-120 Mulberry St.
North Richland Hills, TX 12345

Tip: Delivery scan was far away from destinating address.

Destinating

Thomas Thompson

1234 Main Street
North Richland Hills, TX 12345

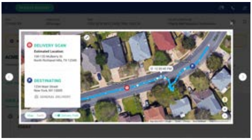
Townhouse

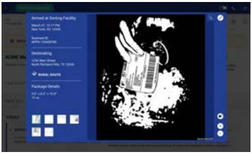
carrier path
delivery history

trackingEventName
trackingEventDetails

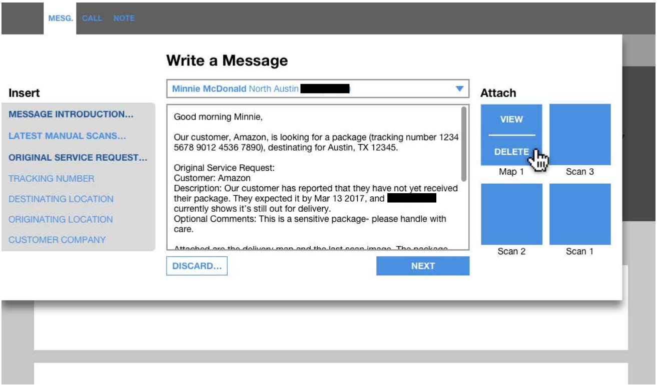
eventDateAndTime
timeSincePreviousEvent
carrierRouteData

eventLocation
otherEventData





Expediting common internal & external comms


MESG.
CALL
NOTE
Insert
MESSAGE INTRODUCTION...
LATEST MANUAL SCANS...
ORIGINAL SERVICE REQUEST...
TRACKING NUMBER
DESTINATING LOCATION
ORIGINATING LOCATION
CUSTOMER COMPANY
Attach
VIEW
DELETE
Map 1
Scan 3
Scan 2
Scan 1
DISCARD...
NEXT

Write a Message

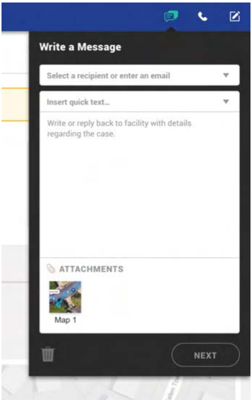
Minnie McDonald North Austin [redacted]

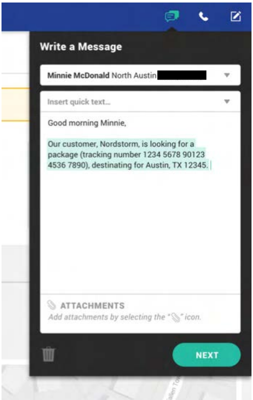
Good morning Minnie,

Our customer, Amazon, is looking for a package (tracking number 1234 5678 9012 4536 7890), destinating for Austin, TX 12345.

Original Service Request:
Customer: Amazon
Description: Our customer has reported that they have not yet received their package. They expected it by Mar 13 2017, and [redacted] currently shows it's still out for delivery.
Optional Comments: This is a sensitive package- please handle with care.

Attached are the delivery map and the last scan image. The package


Write a Message
Select a recipient or enter an email
Insert quick text...
Write or reply back to facility with details regarding the case.
ATTACHMENTS
Map 1
NEXT

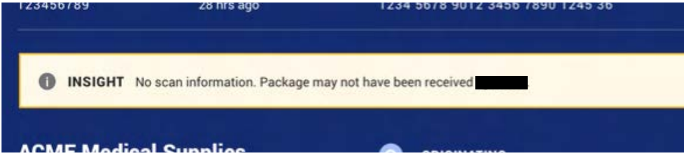

Write a Message
Insert quick text...
ATTACHMENTS
Add attachments by selecting the "📎" icon.
NEXT

Minnie McDonald North Austin [redacted]

Good morning Minnie,

Our customer, Nordstorm, is looking for a package (tracking number 1234 5678 90123 4536 7890), destinating for Austin, TX 12345.

Accurately reflecting algorithmic certainty

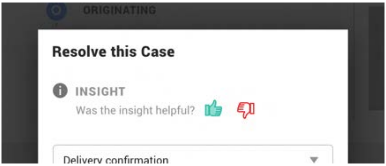

123456789
28 hrs ago
1234 5678 9012 3456 7890 1245 36
ACME Medical Supplies

INSIGHT No scan information. Package may not have been received [redacted].

A primitive algorithm analyzes a package's tracking events at the moment a customer service request is generated, based on historical data.

I drafted the insights it generated to reflect the level of certainty of a given prediction.

80%
helpfulness rating
by agents


ORIGINATING

Resolve this Case

INSIGHT
Was the insight helpful?

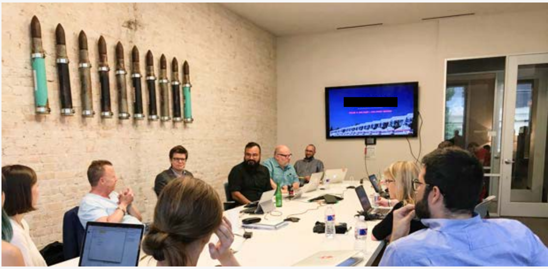
Delivery confirmation

OUTCOMES

Quicker resolution, happier teams

> "It's so intuitive. It's like you took all the things in my head and put it on one screen."

Candace, business rep


[redacted]

We combined seven antiquated resources into one focused, flexible tool that presented information contextually. Happier customers, less wasted time in the field, and agent freedom to be proactive partners instead of putting out fires.

This project directly led to at least four more streams of work with the client, including a 2.0 version of the tool and a downscaled version rolled out to much of company.

39%
shorter first
resolution time

56%
shorter final
resolution time

300 → **70,000**
initial users → later users

ALL REQUESTS CLEARED

Great job! Stand up and give your teammates a high five!

To learn more about this project, other design work, or random bicycle trivia,

// holler at me

ROBERT
BOLER