

## ATLAS – Next Best Action – Redesign Exploration

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### ATLAS – NEXT BEST – REDESIGN EXPLORATION TOPLINE REPORT

#### BACKGROUND

Next Best Action (NBA) is a new tool that will be developed within Atlas to assist CARE experts by utilizing machine learning and artificial intelligence to provide the expert with offers and promotions that are tailored to that specific customer. There is a proof of concept already developed and now the product team is looking to expand functionality. This research will be used to inform a redesign of this tool to account for a regrouping of offers by recommendation rather than just by account/line.

#### RESEARCH OBJECTIVES

- Investigate the interaction design of the NBA tool (panhandle vs accordians)
- Determine optimal selection option interactions (matrix vs radio button list)
- Explore toggle options between view by subscriber and view by recommendation

#### METHODOLOGY, SCHEDULE AND PARTICIPANTS

- Participants: 4 experts in the POC, 3 new experts
- Methodology: 1:1 interview (30 minutes each)
- Date: December 2020
- Prototypes:

BAU link:

<https://preview.uxpin.com/5f1debd69e13bf6b88dc8def5404e5279cd06964#/pages/134567697/simulate/no-panels>

Concept 2 link (accordions):

<https://preview.uxpin.com/5f1debd69e13bf6b88dc8def5404e5279cd06964#/pages/134567700/simulate/no-panels>

Concept 3 link (panhandle):

<https://preview.uxpin.com/5f1debd69e13bf6b88dc8def5404e5279cd06964#/pages/134567704/simulate/no-panels>

## Main Findings

- Overall, experts in the POC as well as experts new to NBA are very excited about this tool. They said they think it is a great tool to help them with their audit and call out opportunities for that customer. They particularly liked the value of the suggested wording section, saying that it is a big help in transitioning the conversation to a new topic.
- Participants said that the panhandle version that was discussed feels more organized and requires a lot less scrolling. It will also group all the NBA offers in an easy-to-read list on the left hand side of the tool – a location that is expected to be a navigation area.

The screenshot shows a web interface titled "Next best action". At the top, there is a toggle switch between "Subscriber" and "Offer", with "Offer" currently selected. Below this, the interface is split into two main sections.

**Left Section (List of Offers):**

- Bill Pay  
Account 987 669 745
- Phone Upgrade iPhone  
3 lines** (highlighted with a pink bar)
- iPad Upgrade  
3 lines
- Phone Upgrade Samsung  
1 line

**Right Section (Detailed View of 'Phone Upgrade iPhone'):**

**Sale Opportunity: Likely to upgrade**  
**NEXT BEST ACTION:** Upgrade to iPhone 12 series with EIP  
**Suggested wording:** Did you hear Apple just released a new iPhone? We have a few deals on it I can tell you about!

	Accept	Decline
Jill Smith, (253) 555-5557	<input checked="" type="radio"/>	<input type="radio"/>
Brian Smith, (253) 555-5558	<input type="radio"/>	<input type="radio"/>
Fred Smith, (253) 555-5559	<input type="radio"/>	<input type="radio"/>

[Clear all](#)

☐ NOT DISCUSSED - Didn't talk about upgrades for all lines

- ACCEPT - Discussed and upgraded to iPhone 12 series with EIP
- DECLINE - Discussed and didn't upgrade to iPhone 12 series with EIP

[Upgrade iPhone](#)

[Save](#)

- Experts would like a visual indicator that of which offer in NBA is associated to the line that is calling in. They mentioned that displaying the caller's number next to an NBA or adding an icon to indicate that there is an offer for that line in that tab would help them identify which NBAs might be more successful. They are indifferent to knowing the number of lines that are in each section. Recommendation: Either go with the "MSISDN + # of other lines" or a visual indicator, such as an icon, without counting the number of lines in the section.
- Participants think the toggle between subscriber and offer would be useful, however, there is still a split on which one should be default. Some experts prefer to view NBA by Subscriber and some prefer to view it by Offer.
- For the toggle, participants said that the stacked radio buttons seem cleaner and more consistent with the look and feel of Atlas. Recommend going with stacked radio buttons.

- There were no problems with the matrix usability. All experts were able to correctly use the matrix to make their selections for each line. The matrix is better than a list of vertically aligned radio button selections.
- Within the matrix, radio buttons or check marks both work equally well to fill in the correct selection. Experts had no preference either way.
- Participants indicated that using Accept/Decline as the column selections on all NBA offers would make it consistent requiring them to think less about what it means. They mentioned that selecting Accept means that they did the Next Best Action as it was described in the section above. And that Decline means that they did not do the action as it was described.
- “Did not discuss” should be a column in the matrix. This way the expert can select it for some lines and not others.
- Links provided to take action on the NBA should always be active. Participants were split on the location. Some felt that the link should be just below the suggested wording, while others felt that it made more sense after the matrix. The experts who wanted the link below the suggested wording, plan to do the action then select Accept, then save. While the experts who wanted the link below the matrix, plan to select Accept, do the action, come back to NBA and potentially reselect (if needed), and then save. Recommendation to put the links just below the suggested wording to get the largest cross section of user behaviors.
- Experts expect to wait until the end of their call to make their selection (or re-evaluate their selection) in the matrix and then click “save”. However, some experts are concerned that they will forget to make their selections in NBA. Recommend adding a warning module to remind experts that they have unsaved NBA changes before closing an account.
- A tech expert requested a way to send documents/educational material to customers directly from NBA.
- One expert requested that the NBA tool also provide offers for tenured customers that promote loyalty. Customers sometimes say that they have been a loyal T-mobile customer for 10 years and don’t get offers that T-mobile sometimes gives to customers that are not as tenure or not always up to date with their bills. They want to feel the loyalty too. This expert feels that NBA can also be used for these kinds of loyalty offers.

### Additional Findings

- Memo history section has been freezing for multiple experts causing problems with font sizes and preventing scrolling. Experts have been switching to Samson to finish that call, then re-log in to Atlas after that call is over to reset the memo history section.
- Device Dashboard does not display which digits lines are paired with which voice lines.
- Payment method on file in the payment app is not saving the credit card information. The same customer has to validate their credit card every single time they try to make a payment.

- Experts would like the ability to cancel lines within Atlas.
- Experts would like to see EIP eligibility on the Account Overview page.
- Kudos! Experts are very excited and happy with the credit card update tool being linked directly from the Order Lookup tool. They said it saves them so much time.

REVIEWER: Swati Sood  
Designer Reviewed: Karen MacCubbin

DATE:  
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