AIM Usability Analysis Side-by-Side, 09/11/2014

Conducted and documented by Don Demrow

Introduction and Purpose

On September 11th, 2014, I was able to conduct an informal initial usability analysis with help from members of Phil Cavan's and Stuart Clark's customer service representative (*hereinafter referred to as 'CSR'*) team. This document contains the distilled results of that analysis. The purpose of this initial analysis was to evaluate the AIM system and related peripheral systems from a usability perspective and to identify affordance issues, and any potential or actual obstacles that could prevent or hinder efficient accomplishment of user tasks.

UI/ UX Observations, and Opportunities for Improvement

AIM Notes has Windows clipboard access via JavaScript. CSR uses this functionality to copy comments entered by the CSR into AIM Notes to paste into rPay. There may be potential to make this task less redundant.

Phil Cavan has created a very useful access database application, "**Annuity Prospect Lead Tracking**."

CSRs use Windows clipboard to copy the Control Number that is associated with each kit, and paste it into appropriate blanks of their Case Admin, Inbound Call, Outbound Call, and Quick Quote screens.

In the "Search Results" screen, the headings are underlined, but they're not hyperlinks.

In some cases, data that exists in our system is not pre-populated into blanks where, if it were, it would expedite the processing of customer verification or data entry for the CSRs. I noted that the "Date of Birth" field on at least one screen was an example of this.

On the "Existing Orders > Expired" screen, the offers were not chronologically sequenced, which caused the CSR to have to take extra time to visually search for records.

City and state fields do not auto-populate based on zip code.

I did not observe any latency issues with AIM screen loading times.

Comments From Customer Service Representatives

"Buttons are too small." **Proposed Solution**
"Reset and back links are too close together, and too close to other links and buttons." **Proposed Solution**
"It would be nice if city and state fields could auto-populate based on zip code." **Proposed Solution**
"It would be nice if I had all the data we already have, preloaded into the blanks." **Proposed Solution**

Recommended Improvements

Port the “Annuity Prospect Lead Tracking” access database application over to ASP, to allow table queries and searching, and to allow the information contained within that database to be in sync with the AIM application.

Make the Control Number clickable. Upon clicking it, it would be copied into either the Windows clipboard, or better yet, saved into a hidden form field, that could be passed into subsequently opened screens, such as Case Admin, Inbound Call, Outbound Call, and Quick Quote.

Remove underscores that are for emphasis from all text. Consider making fonts larger, or bold to indicate importance or hierarchical priority. Use underscored text only when text is a hyperlink. If columns are made to be sortable by clicking the header text, it is then be appropriate for the text of those headers to be underscored to indicate that they are hyperlinks.

Pre-populate all fields with any data we have available in our system. This will expedite customer verification and form entry by the CSR. There is no valid reason to withhold data that to which the CSR eventually can access.

Whenever tabular data is presented, care should be taken to ensure that the default sort order is correct (date or time fields are in chronological order, for example), and that records are sorted by the most appropriate criteria (for example, if sorting on a date field is more useful to the CSR in most cases, that may be the best choice for the ***default*** sort order). Perhaps, in some cases, the default ‘sort by’ column can be user defined, to afford the CSRs the quickest access to most-often-used, or most important data for their particular case.

I noticed that many of the form fields are not automatically populated, although that data is already in our system. **We should load all data that is available to our AIM system into form fields as applicable.** (date of birth, address, phone data, for example.)

An example: When city and state (and possibly time zone) data are already present in our system, it may be possible to automatically populate those fields (**via an asynchronous AJAX call**) – triggered by entry of zip code information into the zip code form field by the CSR.

The original AIM application was built at a time when screen resolutions are not what they are today. Because of the use of higher resolution monitors, buttons, text, and graphics are approximately one-half the size they were in lower screen resolutions. This should be addressed, and is a relatively simple task.

Actual back and reset buttons. Positioning is poor, and they are too small.

I recommend that I be afforded the opportunity to make some simple modifications in layout and sizing of onscreen elements, to facilitate improvements in the completion of onscreen tasks by the CSRs. I further recommend that established usability standards and conventions be applied to the visual user interface, creating a more intuitive interface that will not require as much time to be ‘learned’ as is the current case – but rather, an interface that is sufficiently intuitive to greatly reduce ambiguity of the various page elements.

A further possible enhancement would be to include time zone information for each customer. An easy-to-see icon that identifies the current customer's time zone, displaying the earliest time to call, as shown in the illustrations below, would make that information available at a glance.

Icon displays time zone, and earliest time to call from Tampa call center, Eastern time zone.

I would also like to eventually integrate Phil's "Annuity Prospect Lead Tracking" database application into AIM, and give it query and search functionality, as well as column sorting. Doing so would enable CSRs to more efficiently service each customer call.

Benefits to New York Life

A - Lower cost to NYL, through reduction in call times

More expeditious call handling will become increasingly important as call volume increases.

B - Better CSR engagement, because:

1 - They have a more usable application to work with.
2 - They understand that they play a role in the application's design and development.
3 - They understand that management, and the developers are 'on their side,' working to improve their working conditions.

C - Establishment of a better, user-centered design and development standard