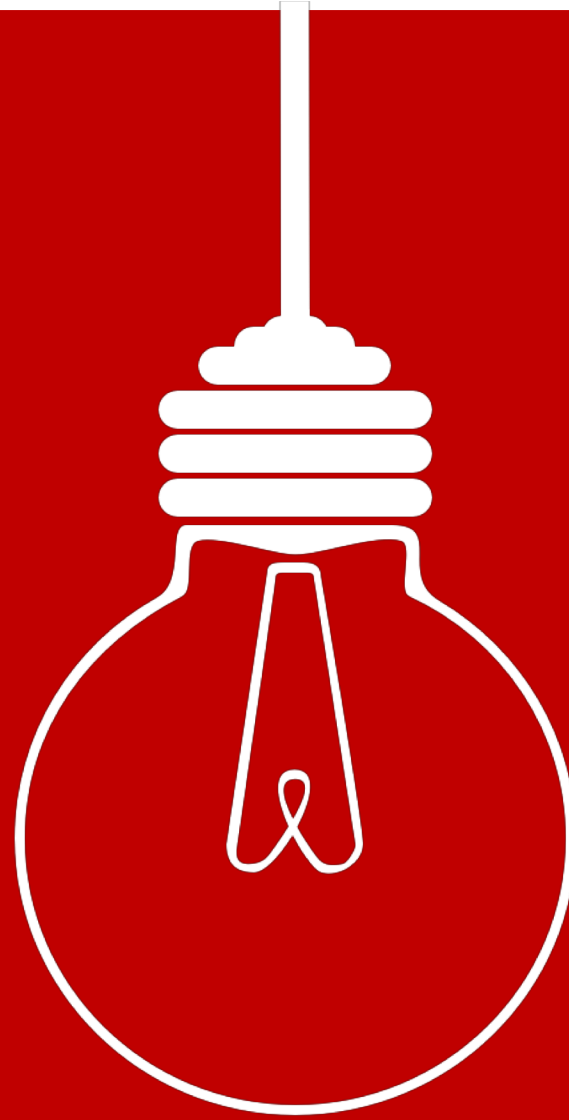

Lisa Montalvo

User Experience Designer





Today's Projects

Today's Projects

Support Changing SaaS Business Model

Make and Take calls with UC Client



Onboarding New Users to Platform
so they can use UC Client

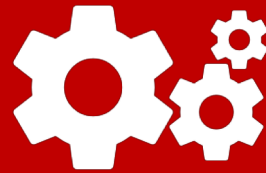


My Team

Product Owner

Solution Architects

Senior Management



My Role

Interviews

Storyboarding

Flow Diagrams

UX/UI design



Duration

3 Months

The Problem

The Problem

Create a way to

1. Identify Partner Company

The Problem

Create a way to

1. Identify Partner Company
2. Download existing user list from current database

The Problem

Create a way to

1. Identify Partner Company
2. Download existing user list from current database
3. Import new users

The Problem

Create a way to

1. Identify Partner Company
2. Download existing user list from current database
3. Import new users
4. Edit current users

The Problem

Create a way to

1. Identify Partner Company
2. Download existing user list from current database
3. Import new users
4. Edit current users
5. Create new extensions

The Problem

Create a way to

1. Identify Partner Company
2. Download existing user list from current database
3. Import new users
4. Edit current users
5. Create new extensions
6. Make it crazy simple so Partners will quickly adopt new offer

Who will use the new process?

Who will use the new process?

Partners

Some are sophisticated AM users

Some are just mom and pop shops

Limitations

We can automatically set up all the companies in the system,
but

Limitations

We can automatically set up all the companies in the system, but

- The partner may or may not have a company set up.
- We might not know which company belongs to the partner.

The Challenges

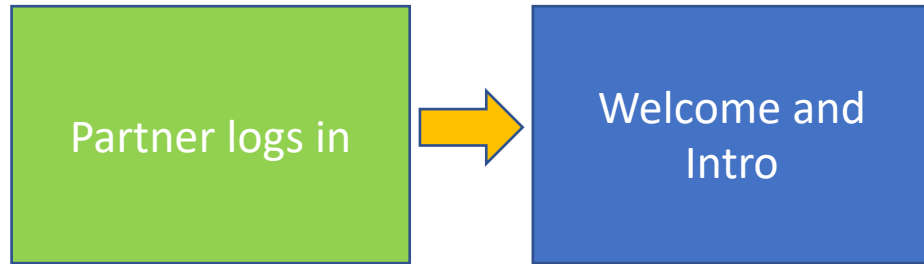
- Large Data Set – 300,000 Companies
- Making it easy for the user instead of the developer
- Many pages in the system have to be updated
- Making it fool proof

The Strategy

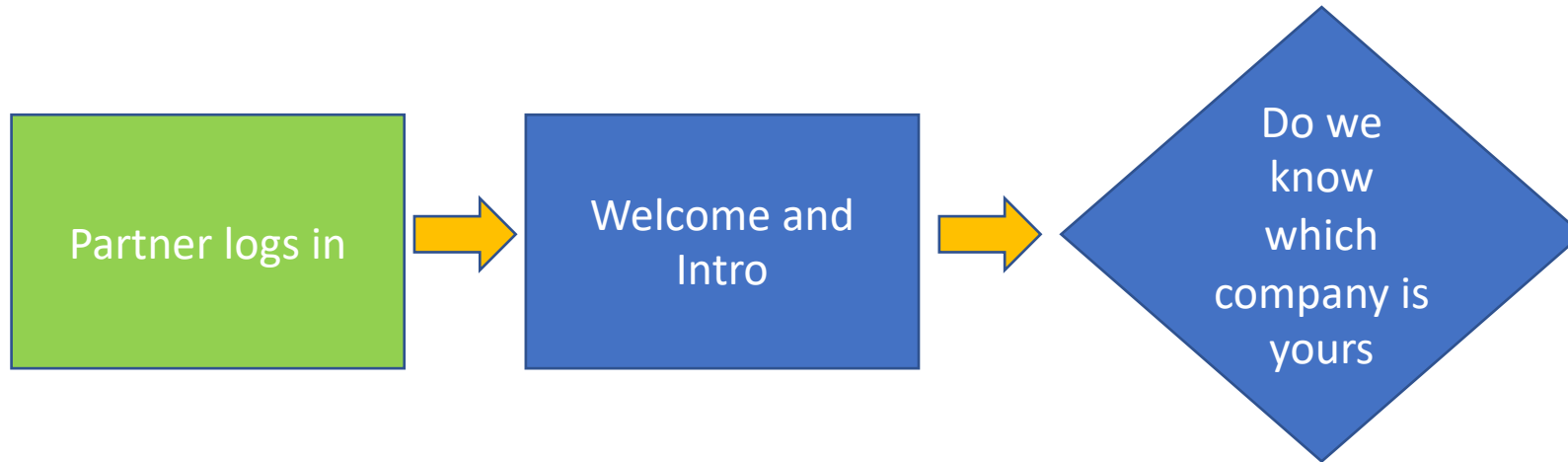


Partner logs in

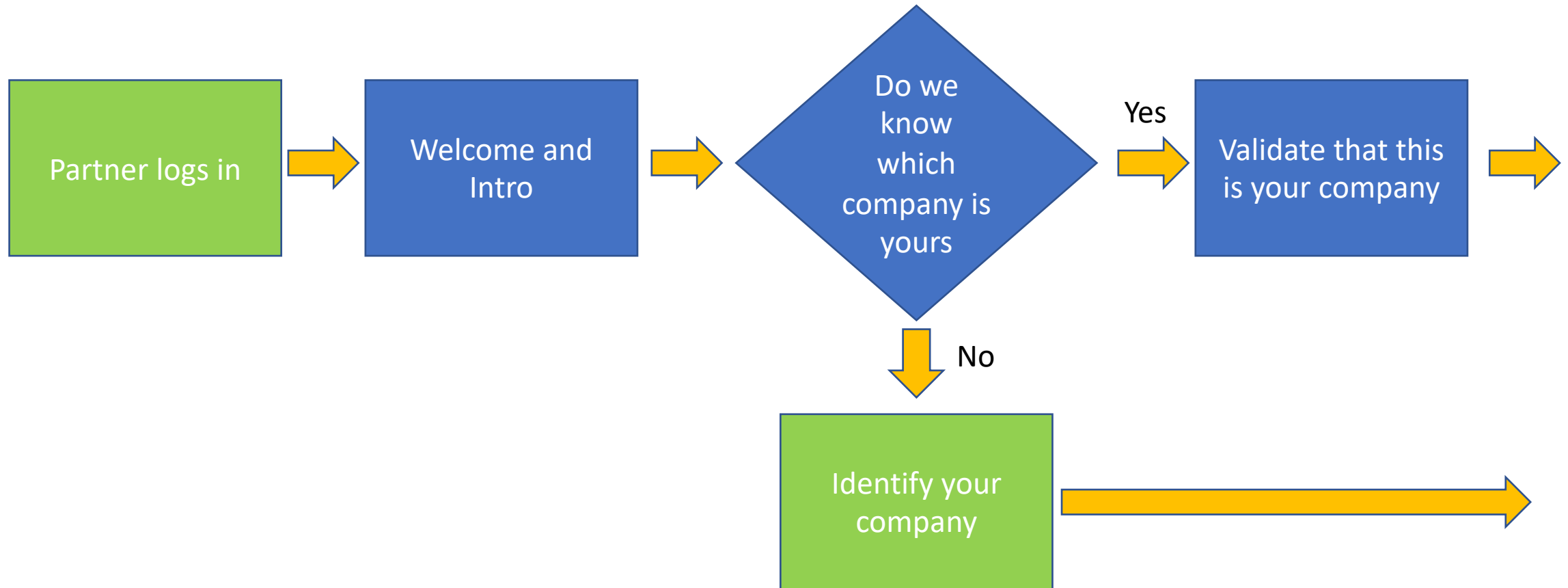
The Strategy



The Strategy



The Strategy



The Strategy

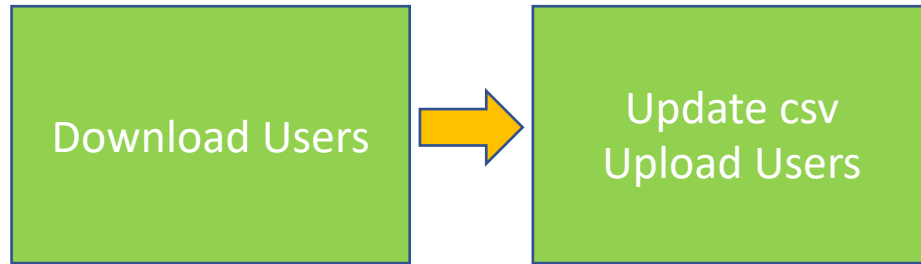
continued



Download Users

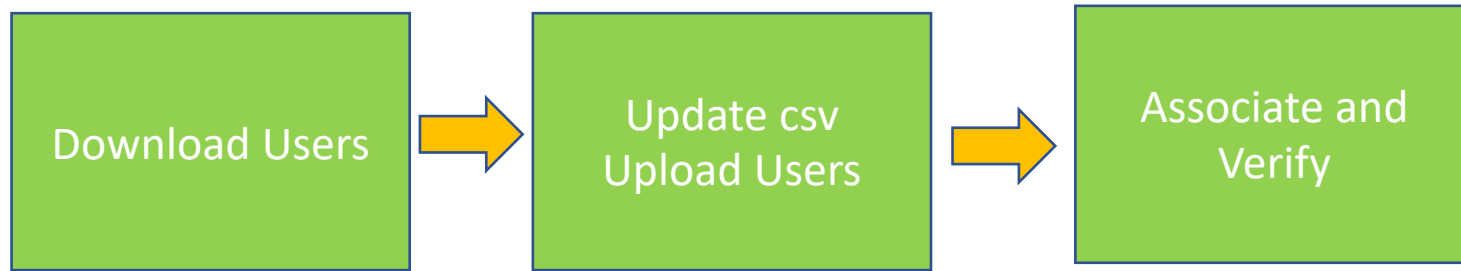
The Strategy

continued



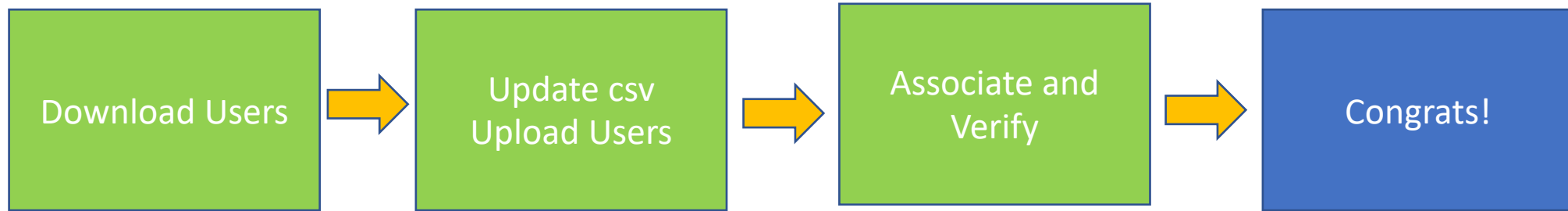
The Strategy

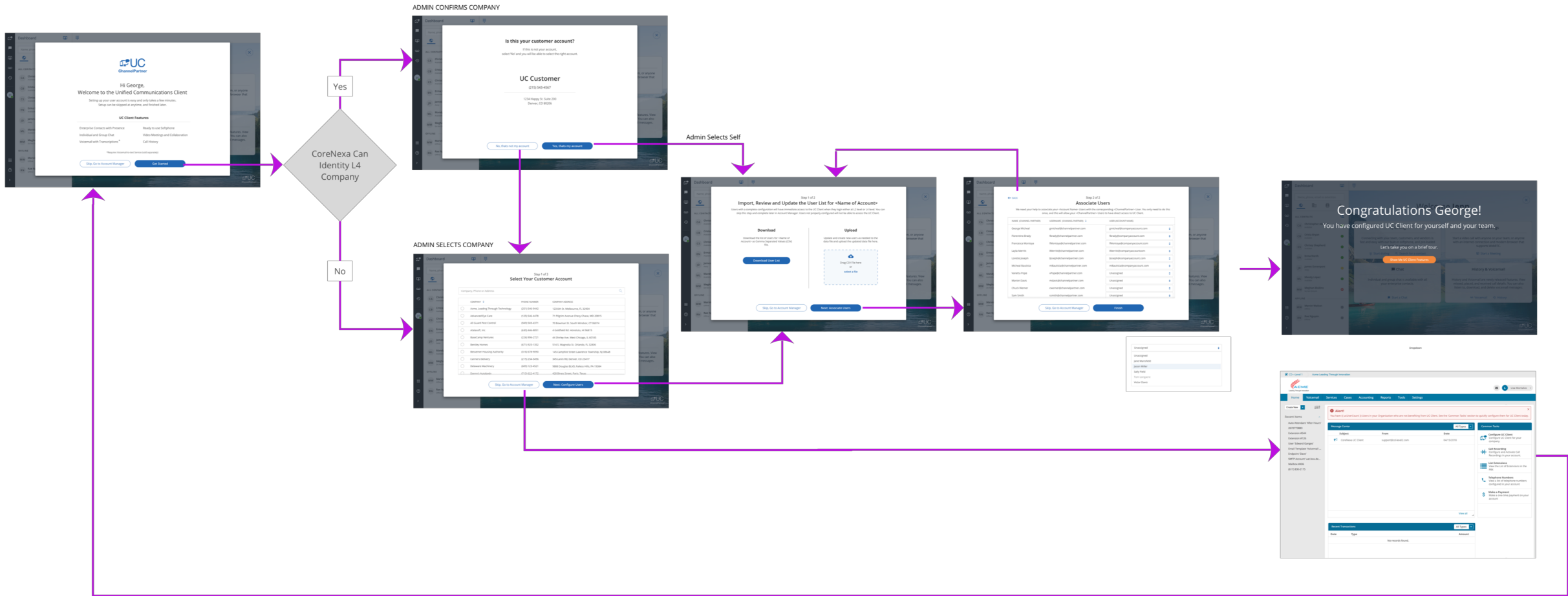
continued



The Strategy

continued





Dashboard

Name, phone

ALL CONTACTS

CA

Christa

Available

CB

Crista

Available

CS

Chriss

Available

EN

Erma

Available

JD

James

Away

ML

Mandy

Available

MM

Megha

Do Not D

OFFLINE

MW

Marvin

Offline

RN

Rae N

Offline

?

>

UC

ChannelPartner

Hi George,

Welcome to the Unified Communications Client

Setting up your user account is easy and only takes a few minutes.
Setup can be skipped at anytime, and finished later.

UC Client Features

Enterprise Contacts with Presence

Individual and Group Chat

Voicemail with Transcriptions*

Ready to use Softphone

Video Meetings and Collaboration

Call History

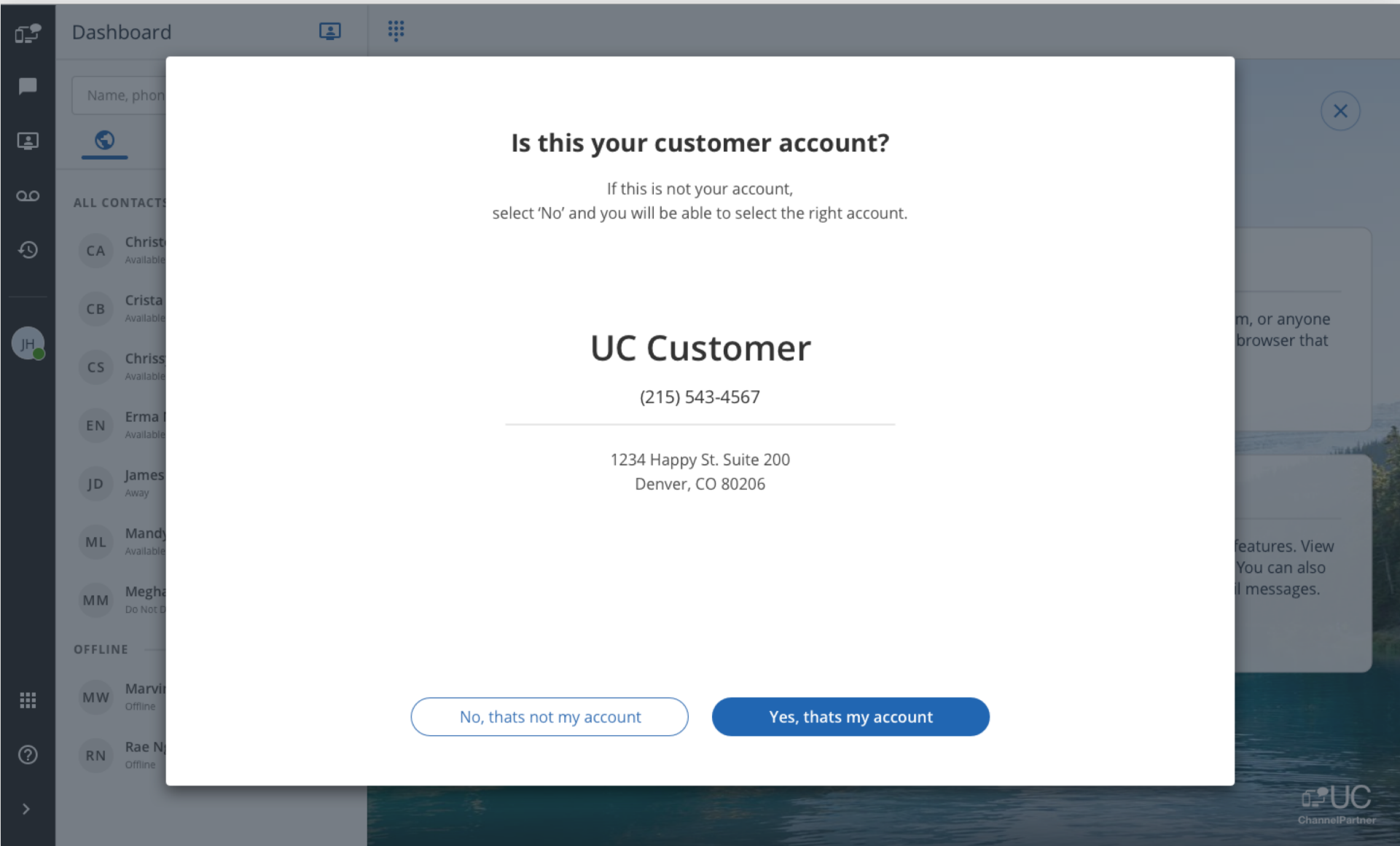
*Requires Voicemail-to-text Service (sold separately)

Skip, Go to Account Manager

Get Started

UC

ChannelPartner



Is this your customer account?

If this is not your account,
select 'No' and you will be able to select the right account.

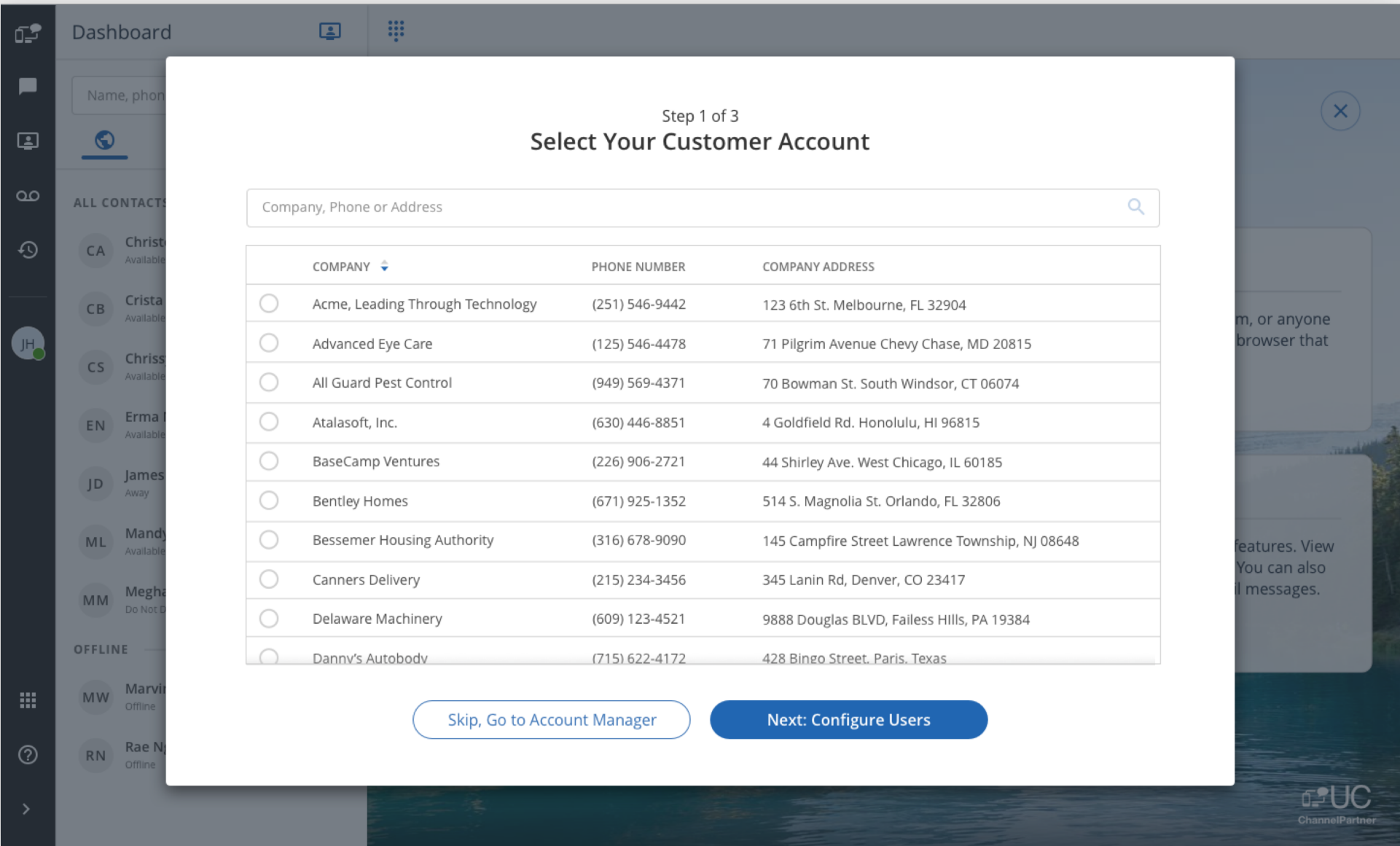
UC Customer

(215) 543-4567

1234 Happy St. Suite 200
Denver, CO 80206

No, thats not my account

Yes, thats my account



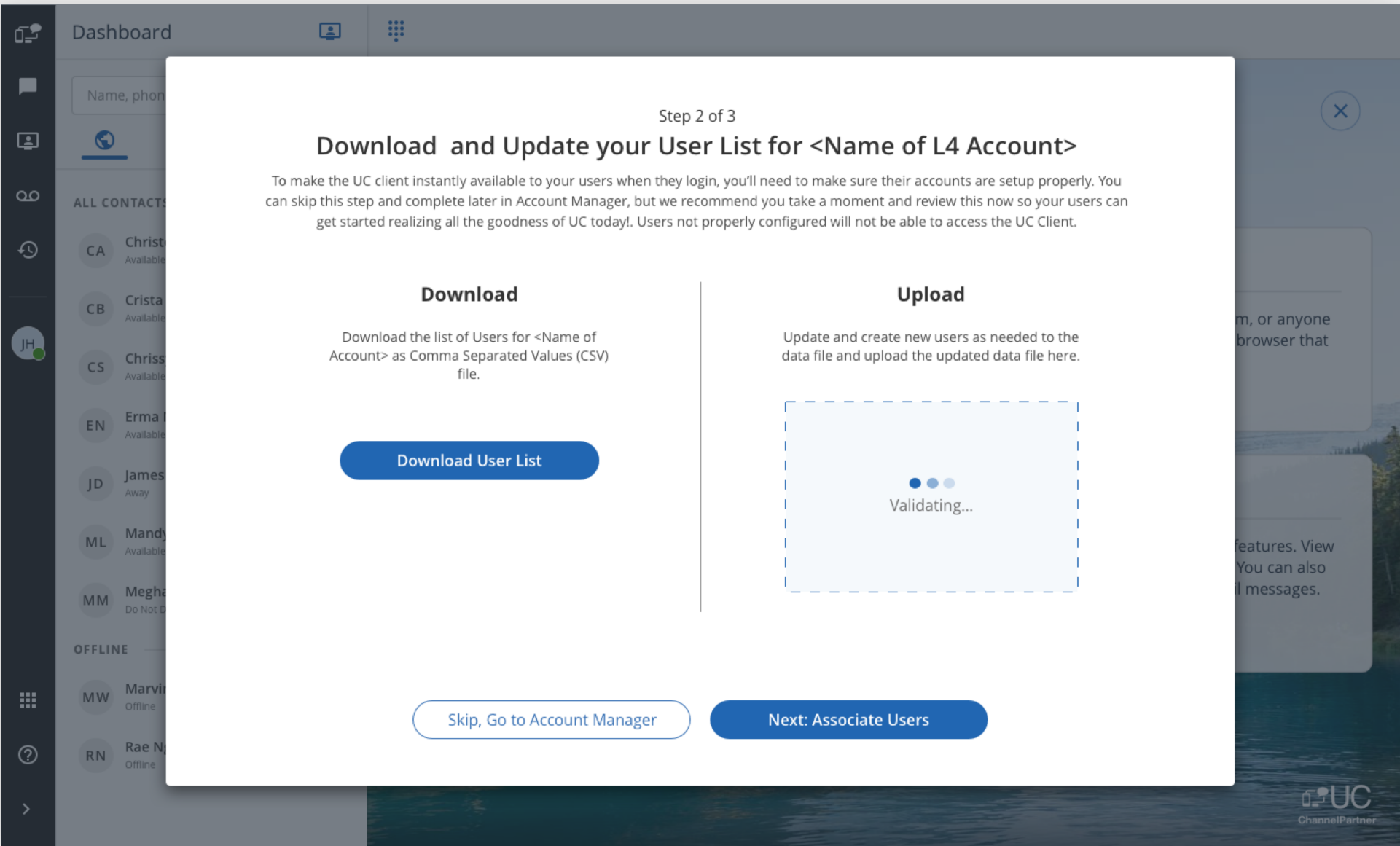
Step 1 of 3

Select Your Customer Account

Company, Phone or Address			
COMPANY	PHONE NUMBER	COMPANY ADDRESS	
<input type="radio"/> Acme, Leading Through Technology	(251) 546-9442	123 6th St. Melbourne, FL 32904	
<input type="radio"/> Advanced Eye Care	(125) 546-4478	71 Pilgrim Avenue Chevy Chase, MD 20815	
<input type="radio"/> All Guard Pest Control	(949) 569-4371	70 Bowman St. South Windsor, CT 06074	
<input type="radio"/> Atalasoft, Inc.	(630) 446-8851	4 Goldfield Rd. Honolulu, HI 96815	
<input type="radio"/> BaseCamp Ventures	(226) 906-2721	44 Shirley Ave. West Chicago, IL 60185	
<input type="radio"/> Bentley Homes	(671) 925-1352	514 S. Magnolia St. Orlando, FL 32806	
<input type="radio"/> Bessemer Housing Authority	(316) 678-9090	145 Campfire Street Lawrence Township, NJ 08648	
<input type="radio"/> Cannors Delivery	(215) 234-3456	345 Lanin Rd, Denver, CO 23417	
<input type="radio"/> Delaware Machinery	(609) 123-4521	9888 Douglas BLVD, Failless Hills, PA 19384	
<input type="radio"/> Danny's Autobody	(715) 622-4172	428 Bingo Street. Paris. Texas	

Skip, Go to Account Manager

Next: Configure Users



Step 2 of 3

Download and Update your User List for <Name of L4 Account>

To make the UC client instantly available to your users when they login, you'll need to make sure their accounts are setup properly. You can skip this step and complete later in Account Manager, but we recommend you take a moment and review this now so your users can get started realizing all the goodness of UC today!. Users not properly configured will not be able to access the UC Client.

Download

Download the list of Users for <Name of Account> as Comma Separated Values (CSV) file.

Download User List

Upload

Update and create new users as needed to the data file and upload the updated data file here.

Validating...

Skip, Go to Account Manager

Next: Associate Users

Dashboard

Name, phone

ALL CONTACTS

CA

Christa

Available

CB

Crista

Available

JH

Chriss

Available

CS

Chriss

Available

EN

Erma

Available

JD

James

Away

ML

Mandy

Available

MM

Megha

Do Not D

OFFLINE

MW

Marvin

Offline

RN

Rae N

Offline

←

BACK

Step 3 of 3

Associate Users

We need your help to associate your <Account Name> Users with the corresponding <ChannelPartner> User. You only need to do this once, and this will allow your <ChannelPartner> Users to have direct access to UC Client.

NAME (CHANNEL PARTNER)	USERNAME (CHANNEL PARTNER)	USER (ACCOUNT NAME)
George Micheal	gmicheal@channelpartner.com	gmicheal@companyaccount.com
Florentino Brady	fbrady@channelpartner.com	fbrady@companyaccount.com
Francesca Montoya	fMontoya@channelpartner.com	fMontoya@companyaccount.com
Layla Merritt	lMerritt@channelpartner.com	lMerritt@companyaccountcom
Lorette Joseph	lJoseph@channelpartner.com	lJoseph@companyaccount.com
Micheal Bautista	mBautista@channelpartner.com	mBautista@companyaccount.com
Vanetta Pope	vPope@channelpartner.com	Unassigned
Marion Davis	mdavis@channelpartner.com	Unassigned
Chuck Werner	cwerner@channelpartner.com	Unassigned
Sam Smith	ssmith@channelpartner.com	Unassigned

Skip, Go to Account Manager

Finish

UC

ChannelPartner

Congratulations George!

You have configured UC Client for yourself and your team.

Let's take you on a brief tour.

Show Me UC Client Features

Chat

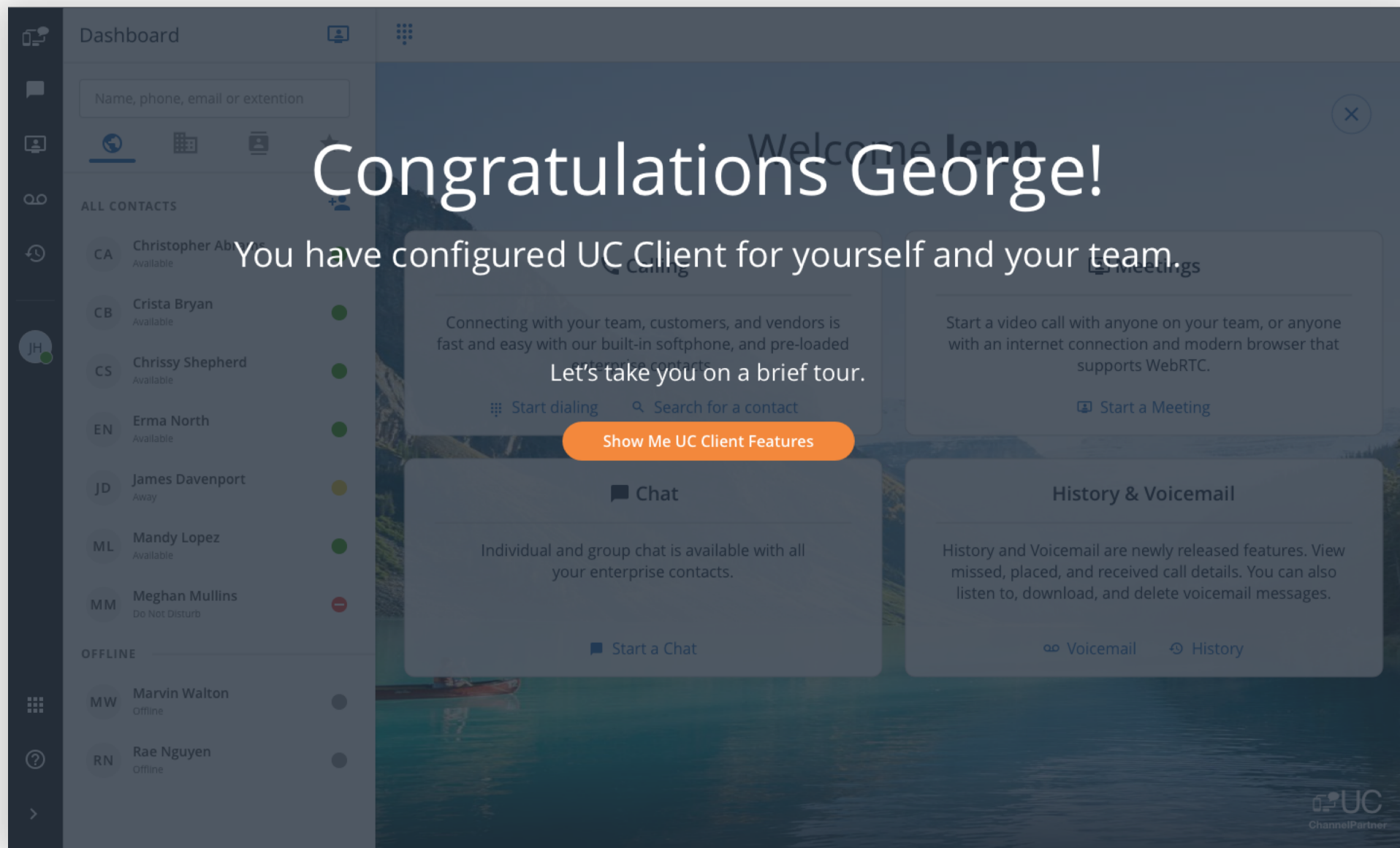
Individual and group chat is available with all your enterprise contacts.

Start a Chat

History & Voicemail

History and Voicemail are newly released features. View missed, placed, and received call details. You can also listen to, download, and delete voicemail messages.

Voicemail History



What were our Challenges

- Fear of not getting 100% adoption
- Finding ways to eliminate steps the user had to take
- Don't get in the Partner's way so they can do the job they came to do

Outcome

- 100% adoption
- 2 to 3 step process eliminated an hour of work.
- Partner can bail and complete the task later

Questions?



Making and Taking Calls in UC Client

The Problem

How do you manage multiple calls in UC Client

The Problem

How do you manage multiple calls in UC Client

1. Provide the same functionality for calling in UC Client as is available in desktop phone

The Problem

How do you manage multiple calls in UC Client

1. Provide the same functionality for calling in UC Client as is available in desktop phone
2. Manage calls and still be able to chat and view other data like voicemail and history

First Version

Second Version

Dashboard

Search: Name, phone, email or extention

CONTACTS

CA

Chris Abboud

Available

CS

Colleen Schmidt

Available

CS

Colleen Staub

Available

ED

Ed Nader

Available

JD

Jim DeBald

Available

MS

Marcus Sheridan

Available

MV

Meghan VanSpriell

Available

MK

Mike King

Available

RH

Ryan Hope

Available

Ryan Hope

00:00:16

1

Jerry Case

Ringing

Welcome Alan

9:00 AM

April 5, 2017

Start dialing

Start Meeting

Start Chat

Dashboard

Search: Name, phone, email or extention

Contacts

Chris Abboud

Available

●

Colleen Schmidt

Available

●

Colleen Staub

Available

●

Ed Nader

Available

●

Jim DeBald

Available

●

Marcus Sheridan

Available

●

Meghan VanSpriell

Available

●

Mike King

Available

●

Sam Davies

Available

●

Sam Davies

00:00:16

2

9:00 AM

April 5, 2017

Start dialing

Start Meeting

Start Chat

Jerry Case

On hold

(407) 625-8679

Ringing

Final Version

Dashboard

1

4

JH

ALL CONTACTS

CA

Christopher Abrams

Available

CB

Crista Bryan

Available

CS

Chrissy Shepherd

Available

EN

Erma North

Available

JD

James Davenport

Away

ML

Mandy Lopez

Available

MM

Meghan Mullins

Do Not Disturb

OFFLINE

MW

Marvin Walton

Offline

RN

Rae Nguyen

Offline

Erma North

00:00:16

Chrissy Shepherd, (555) 1...

+1

Swap Call

Welcome Jenn

9:00 AM

July 2, 2018

Start a Call

Start Meeting

Start Chat

Go to Account Manager

Questions?