

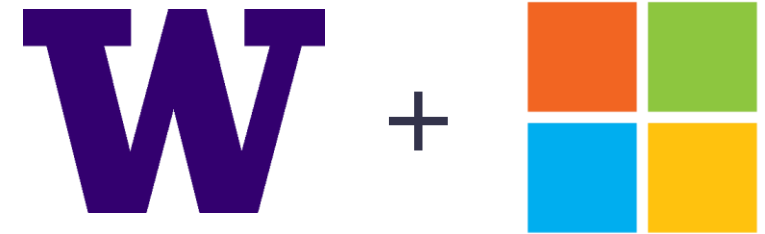
# B2C Customer Experience in Microsoft Teams

Human Centered Design and Engineering: Capstone



## Background

The UW Human-Centered Design & Engineering department's capstone project pairs undergraduate student teams with corporate sponsors to propose and build new interactions in existing products.



## Our team



**Collin Tran**

Design



**Izzy Armstrong**

Design/Research



**Espen Scheuer**

Research



**Olivia Oplinger**

Design/Research

# Objectives



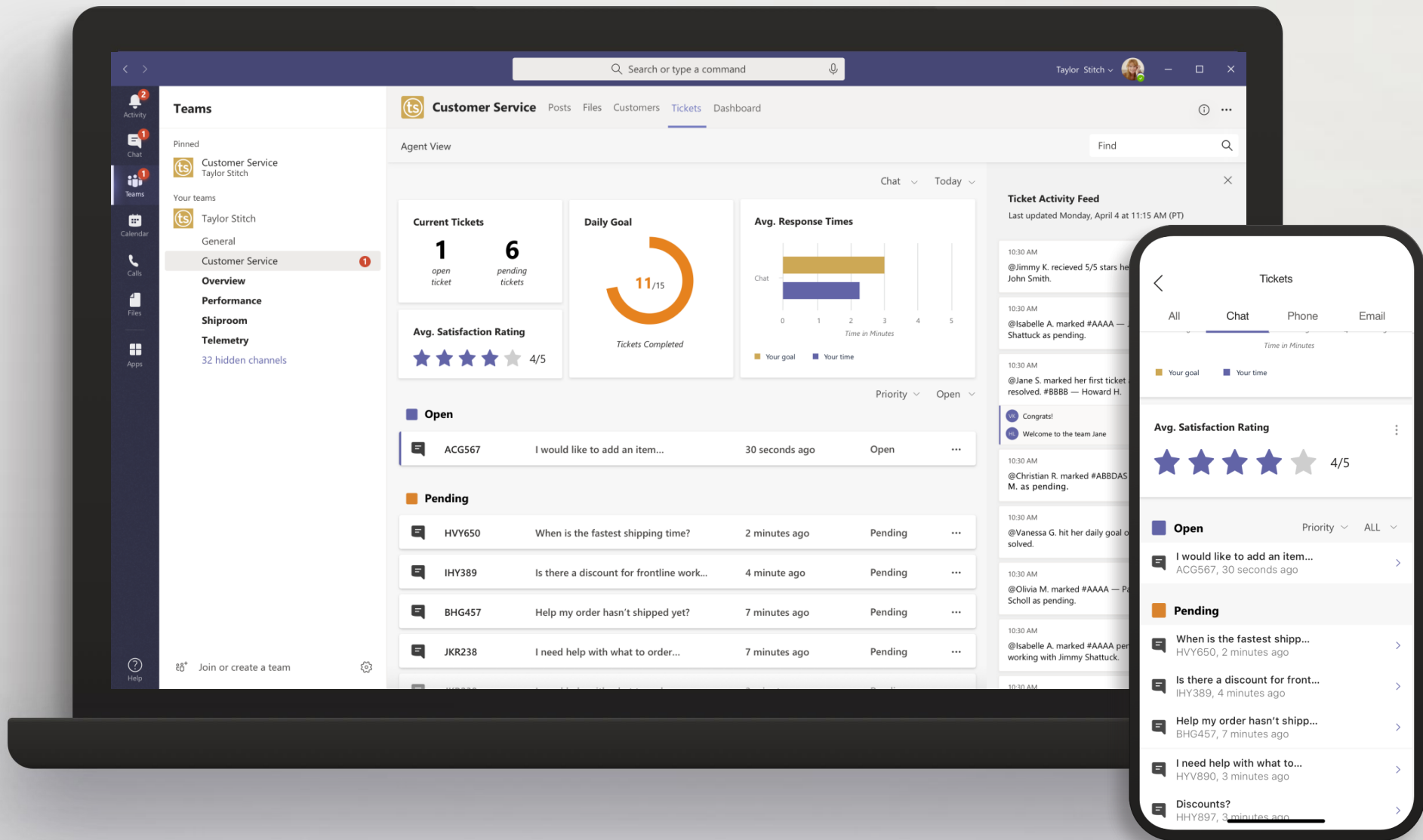
Research unexplored verticals for Channel Apps opportunities



Apply the human-centered design process to define and validate an interaction design solution



Deliver a high-fidelity design concept for Teams integration



# Process

01

Research

Interviews

Competitive Analysis

02

Synthesis

Jobs To Be Done

User Journey

Logic Flow

03

Ideation

Sketching & Exploration

Critique

Medium Fidelity

04

Iteration

User Testing

Final Design

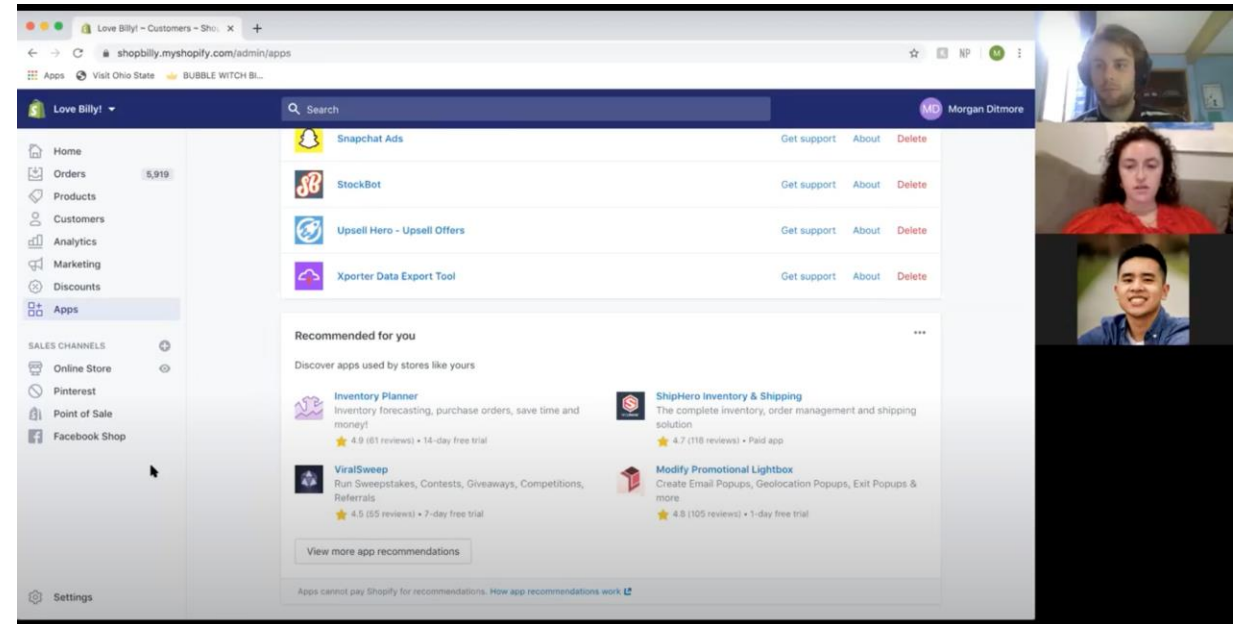


# 01

## Research & Problem Definition

## Preliminary Research

We investigated major players in the e-commerce space, conducting **competitor feature audits** and **interviews with four Customer Experience Agents**, to better understand the current state of customer relationship management.



## Insight 1 of 4

CX agents are overloaded by tools to manage their workflows

"I have 10 tabs open all day" – P1

"We use a bunch of tools for very specific use cases... sometimes we don't use any of their other features" – P3

Referenced tools include:

- Salesforce
- Zendesk
- Klaviyo
- Kustomer
- Ansa
- Wrrk
- Globegistics
- ShipStation

## Insight 2 of 4

CX associates need to balance efficiency and personalization while interacting with customers

"I manually override returns to make sure customers get refunded as quickly as possible" – P2

"I spend almost half my day writing personalized messages to high value customers" – P4

"I couldn't do my work without preset replies" – P3

### Insight 3 of 4

E-commerce SMB's frequently change tools and modify behavior to minimize costs

"We only have one Shopify account and we share the password to save money" – P2

"Software price point is really important. We've changed around tools in the past because of price" – P3

Zendesk pricing starts at \$50 per agent, per month

#### Insight 4 of 4

CX tools lack robust internal messaging and require workarounds for ticket discussions

"I have to use the Slack Zendesk plugin to escalate tickets to my boss" – P4

"We copy and paste our ticket URLs into Slack to get help" – P3

"Stitch Labs doesn't communicate back with Shopify so you have to manually update orders when they are cancelled" – P1

Problem

Customers

Roles

Competitors

How might we **streamline CX workflows** by consolidating their primary tasks into a single tool that facilitates efficient task completion and communication?

Leverage the messaging functionality built into Microsoft Teams to help businesses manage their customer relationships.

Problem

Customers

Roles

Competitors

## **Small to medium e-commerce stores**

These stores are likely to have a volume of customers that necessitate dedicated customer experience employees but lack the budget to build complex fully integrated solutions.

Problem

Customers

Roles

Competitors



### Customer Experience Manager

The CX Manager manages several CX agents working to resolve customer issues, monitoring team performance and resolving issues that are escalated.



### Customer Experience Agent

The CX Agent is the first point of contact with the customer answering questions about products and resolving order issues.



### Customer

The customer is the user visiting an e-commerce site, either looking to purchase something, or contact customer service.

Problem

Customers

Roles

Competitors

## Integrated Platforms

Companies like **Zendesk** provide one place where users can accomplish all of the customer experience tasks from chat to calling.

## Targeted Offerings

Other products target specific industries with individual offerings such as **Drift** a chatbot service that allows enterprise companies to acquire leads automatically.

## Chat-Based Alternatives

To round out our understanding of the competitor space we also looked at consumer chat apps like **WhatsApp** and **WeChat** to understand how they were using chat to facilitate B2C communication.

# 02

## Synthesis

# Jobs-to-be-Done

To better understand what interaction we should design for, we mapped Jobs-to-be-Done to each of the tasks uncovered in our primary research.

| 1 | A                           | B            | C                                          | D                                                                                                                                                                                                                                                                                                                                                                                         | E                                                                                                                                                                                                                                                                                                | F                                                                                                                                                                                                                             |
|---|-----------------------------|--------------|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   | Company/Organization Sector | Role Type    | Jobs To Be Done                            | User Journeys                                                                                                                                                                                                                                                                                                                                                                             | User Scenarios                                                                                                                                                                                                                                                                                   | Microsoft Teams opportunities                                                                                                                                                                                                 |
| 5 | E-Commerce                  | CX Associate | Check order status for customer            | 1. Customer orders item on website<br>2. Customer is anxious to see when their order will arrive<br>3. Customer reaches out via email to customer service<br>4. CX rep asks for order number if not provided<br>5. Uses shopify add-ons to see status of order and potentially expedite shipping via ship station is necessary<br>6. CX rep closes ticket by responding with order status | <b>As a CX Associate, I want to</b><br>1. Receive communication from customers<br>2. Use prewritten responses to respond quickly<br>3. Access order status information quickly<br>4. Have option to expedite shipping if necessary                                                               | - CRM tool to communicate with customers<br>- Macro tool with customized responses<br>- Expedite retrieving and inputting order status information                                                                            |
| 6 |                             |              | Escalate Zendesk ticket                    | 1. Receive Zendesk ticket they cannot answer<br>2. Use slack to forward it to their manager using slack                                                                                                                                                                                                                                                                                   | <b>As a CX Associate, I want to</b><br>1. Review tickets quickly<br>2. Delegate them to the correct person easily                                                                                                                                                                                | - Enable ticket delegation via Teams                                                                                                                                                                                          |
| 7 |                             |              | Custom item inquiry/discussion             | 1. Customer sees custom jewelry offer on website and is interested but not ready to buy<br>2. Customer emails customer service email to inquire further<br>3. CX rep responds with a macro describing their custom jewelry service and links to popular pieces<br>4. Customer buys a custom piece<br>5. Automated Bookthat email asks customer to schedule appt to fit custom jewelry     | <b>As a CX Associate, I want to</b><br>1. Receive communication from customers<br>2. Use prewritten responses to reply quickly<br>3. Schedule appointments and consultations quickly                                                                                                             | - Directly communicate with customer<br>- Scheduling integration in Teams                                                                                                                                                     |
| 8 |                             |              | Edit an order                              | 1. Customer orders item from website and accidentally enters the wrong shipping address<br>2. CX rep responds with macro asking to provide order number and new address<br>3. Customer responds with appropriate info<br>4. CX rep edits shipping address through Shopify back-end and responds with new order update to customer<br>5. If no response, ticket auto-closes                | <b>As a CX Associate, I want to</b><br>1. Receive communication from customers<br>2. Use prewritten responses to respond quickly<br>3. Receive relevant information from customers or automatically<br>4. Edit orders as quickly as possible<br>5. Manage my tickets as infrequently as possible | - Directly communicate with customers<br>- Access Shopify information<br>- Edit order using integrations without leaving teams<br>- Automatic ticket or thread management using Teams CRM set up or bots to prune old threads |
| 9 |                             |              | Schedule appointments and/or consultations | 1. Customer orders custom jewelry piece from website<br>2. Automate email from Bookthat asks customer to set-up appointment for custom piece<br>3. CX Associate or in store employee conducts appointment                                                                                                                                                                                 | <b>As a CX Associate, I want to</b><br>1. Set up automatic email responses based on triggers<br>2. Schedule things with customers without any effort<br>3. Conduct appointments and create meaningful experiences for customers                                                                  | - Automatic teams notifications based on shopify integrations and triggers<br>- Outlook scheduling automatically<br>- Online only appointments through teams links in the emails                                              |

### Example JTBD with Needs: Respond to customer inquiry

1. Mark yourself as active and taking calls
2. Mark yourself as busy during a call
3. Solve issues that customers call in with or escalate to a manager  
(Ideally calls are 15-30 mins long)
4. Wrap up calls by taking notes on the issue and updating wiki
5. Mark yourself as Active again

1. Be able to toggle my 'Active' vs. 'Away' settings
2. Receive communication from customers via phone
3. Escalate problems to a manager
4. Use ticket to add end-of-call notes
5. Create and add to knowledge-base articles

## **Ticket Escalation User Scenario**

From our Jobs-to-be-Done framework, we chose a user scenario that touched many of the jobs we identified.

# CX Order Change Request

Initiate Request ----- Manage Request ----- Complete Request

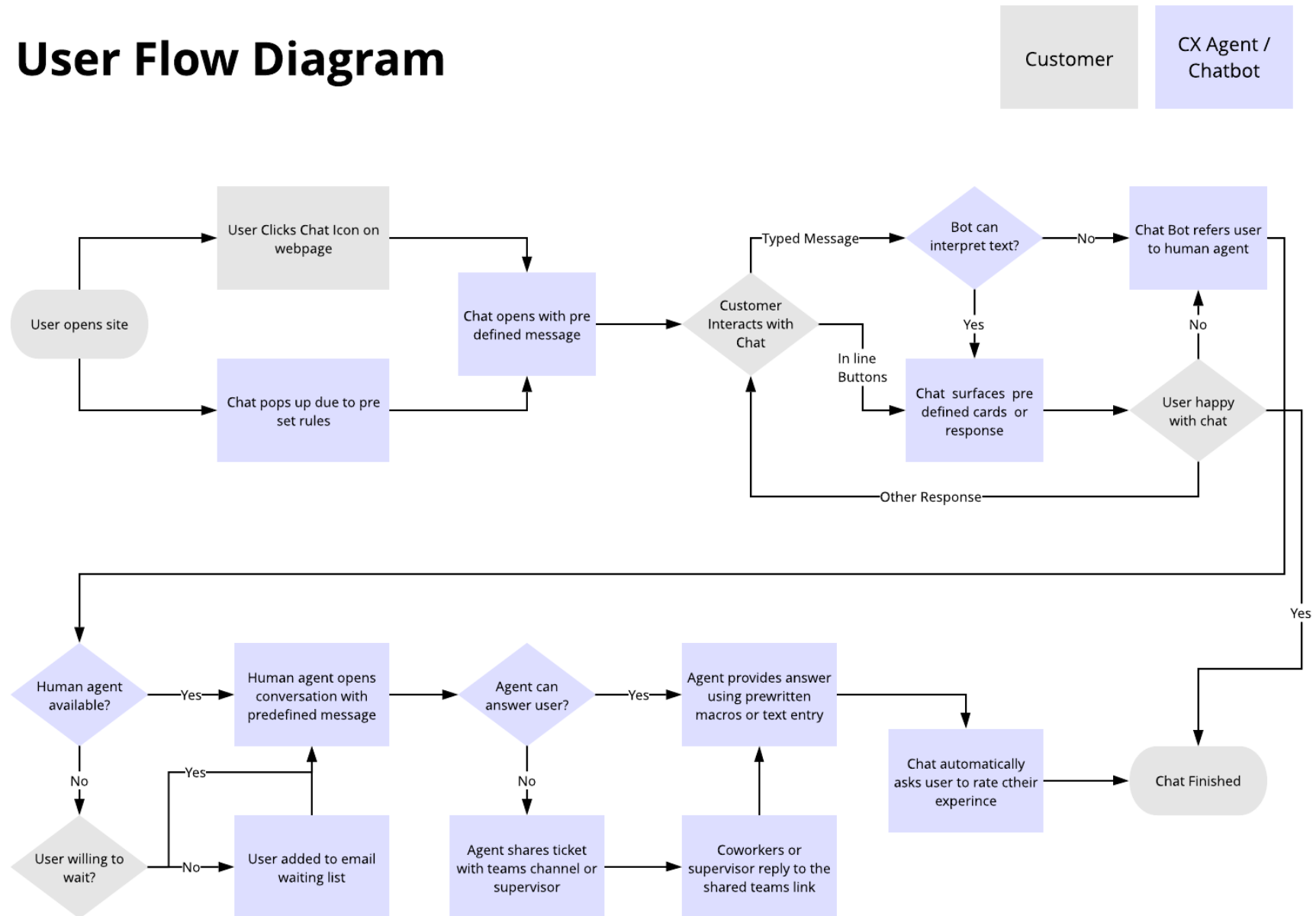
## Customer

| Chat Bot                                 | CX Agent Chat |                                            | Email                                                     |
|------------------------------------------|---------------|--------------------------------------------|-----------------------------------------------------------|
| Select chatbot in lower right of web app |               | Responds to CX agent interactions          | Recieve confirmation of changes that occurred during chat |
| Use multi select buttons                 |               | Rates satisfaction with request experience |                                                           |
| Input information into cards             |               | Input information into cards               |                                                           |
| Use cards to edit information            |               | Use cards to edit information              |                                                           |
| Request to chat with human agent         |               |                                            |                                                           |

## CX Agent

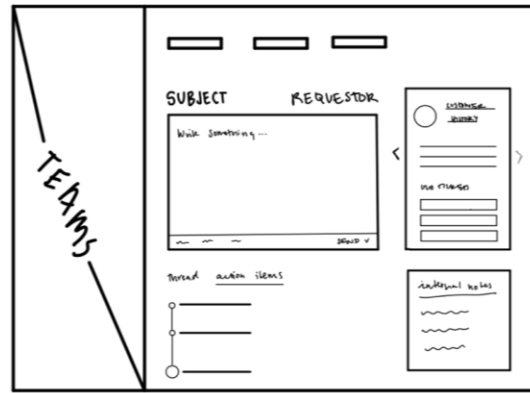
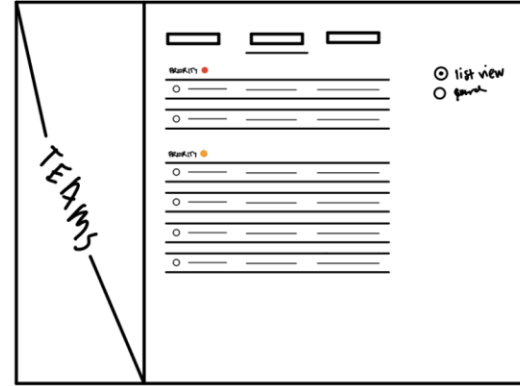
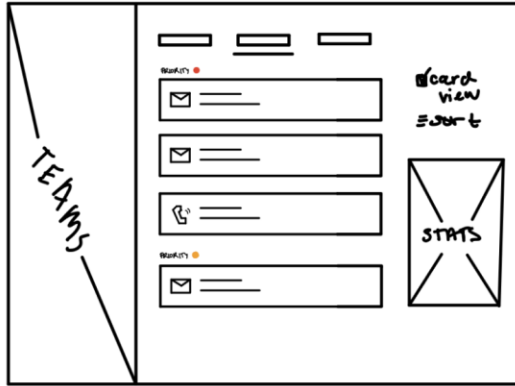
| Personal Dash                        | Ticket                                              | Internal Chat                                  | Ticket                                       | Team Dash                  |
|--------------------------------------|-----------------------------------------------------|------------------------------------------------|----------------------------------------------|----------------------------|
| Manage ticket priority list          | Opens ticket from notification                      | Choose coworker to share ticket with           | Modify order in response to customer         | Reviews team metrics       |
| Take ownership over tickets          | Review metadata on customer                         | Corresponds with manager about ticket question | Automatically send order change confirmation | Sees ticket move to closed |
| Recieve incoming ticket notification | Review chatbot-customer interaction history         | View summary information about ticket          | Close ticket                                 |                            |
| View personal metrics dash           | Select a macro in response to customer request      |                                                |                                              |                            |
|                                      | Shares customer interaction in a card to teams chat |                                                |                                              |                            |

# User Flow Diagram



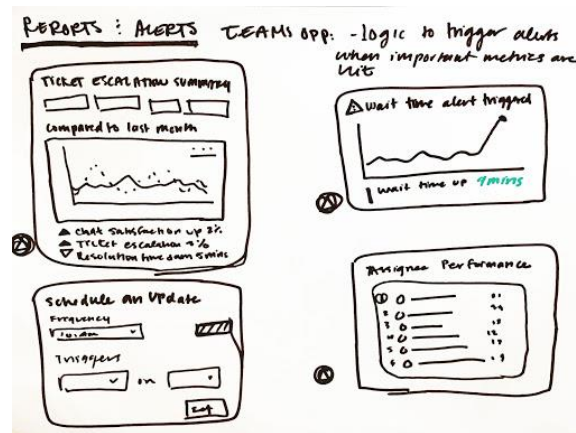
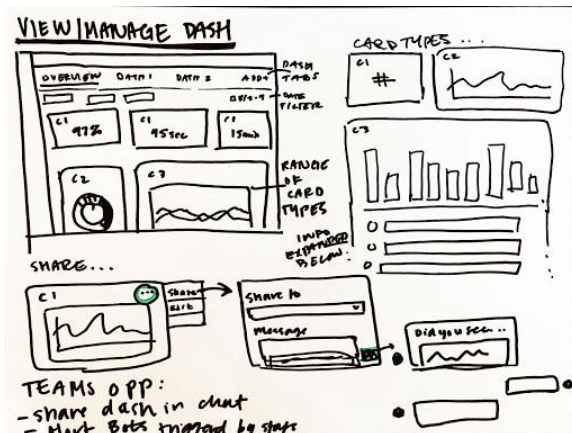
# 03

## Ideation & Design



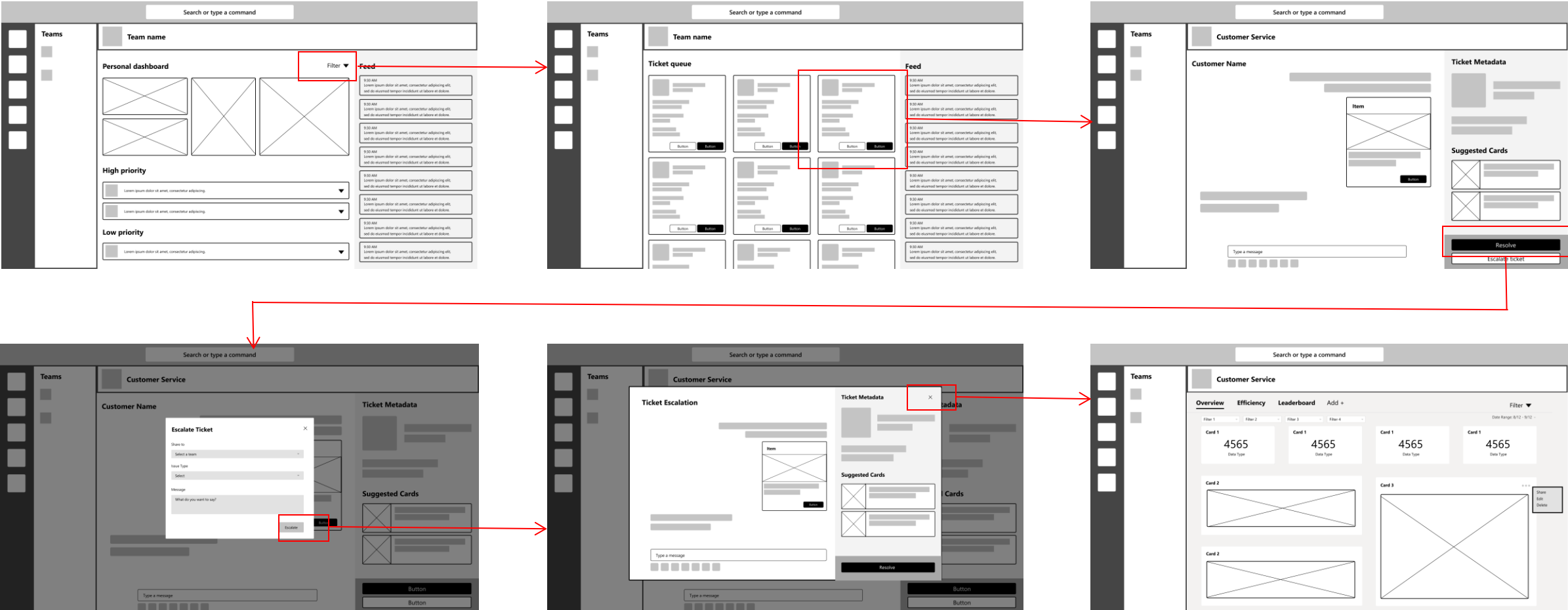
## Sketches

We ideated on how to create a system within teams to answer these queries through a chatbot, ticketing queue, and dashboard.



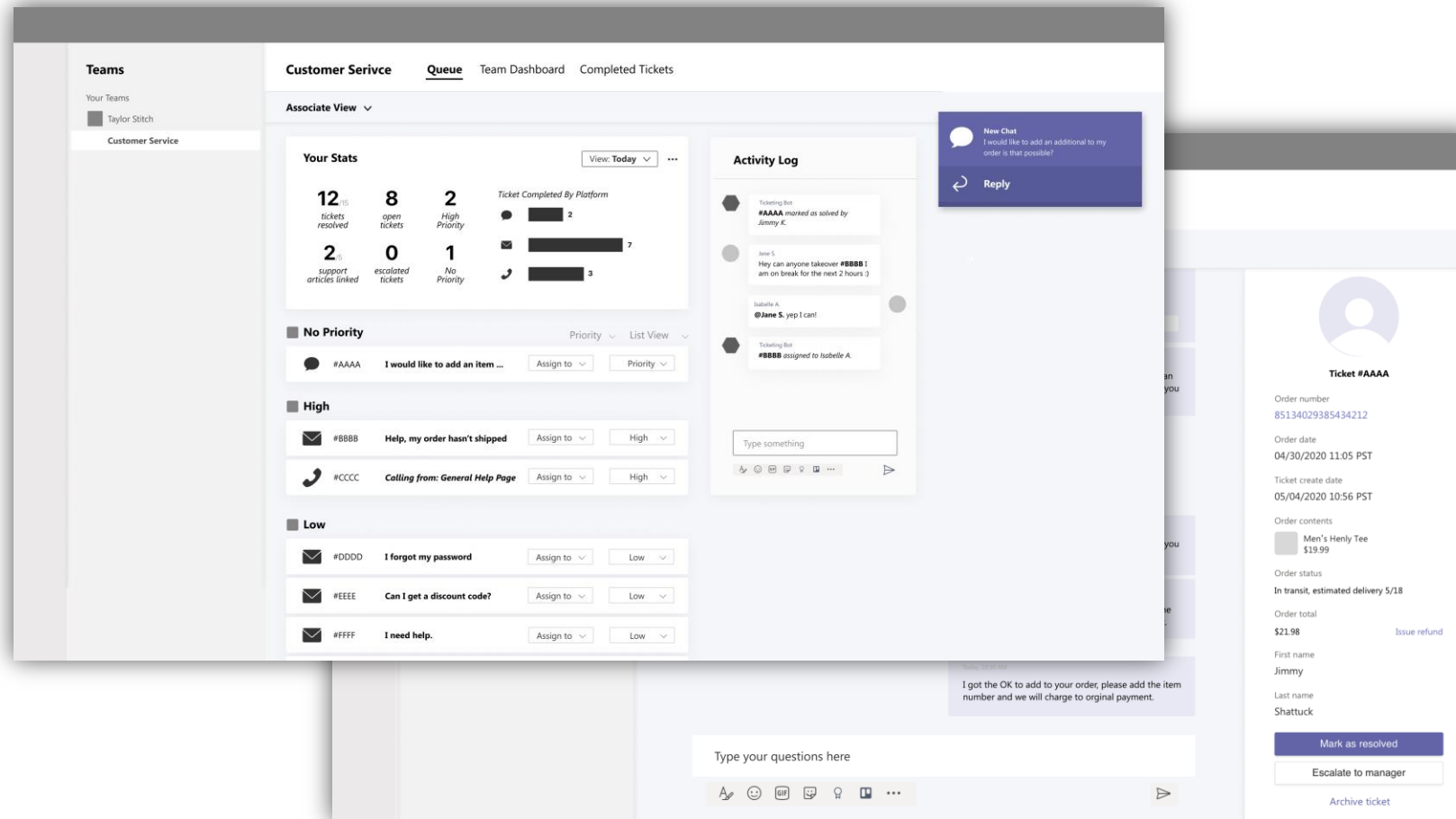
# Wireframes

Mapping the ticket escalation interaction.



# Medium Fidelity

We brought our low fidelity designs up to medium fidelity for review and testing.



# 04

## Testing & Iteration

## Usability Tests

4 Customer Service Employees

1 CX Manager, 2 CX Agents, 1 CX Team Lead

## Goals

1. Concept test ticket escalation and catch usability gaps
2. Understand if we are meeting the problem discovered from initial interviews.
3. Validate chosen scenario and uncover additional scenarios that our software can solve.

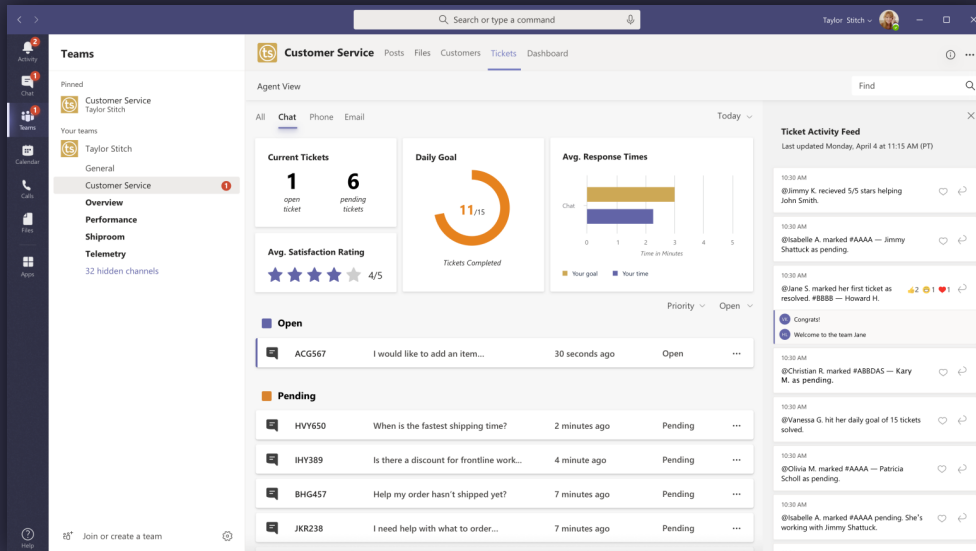
## Validation 1 of 3

Seeing personal metrics and goals motivates increased productivity

"I stalk my status [CSR] often, it drives me, and it's how I get promoted" – P1

"Daily goal, average response times, and average satisfaction are great incentives for the customer service associate" – P2

"...It's also motivating. Like if I see I moved from 97% to 98%, I keep working so I can get to 99%" – P4



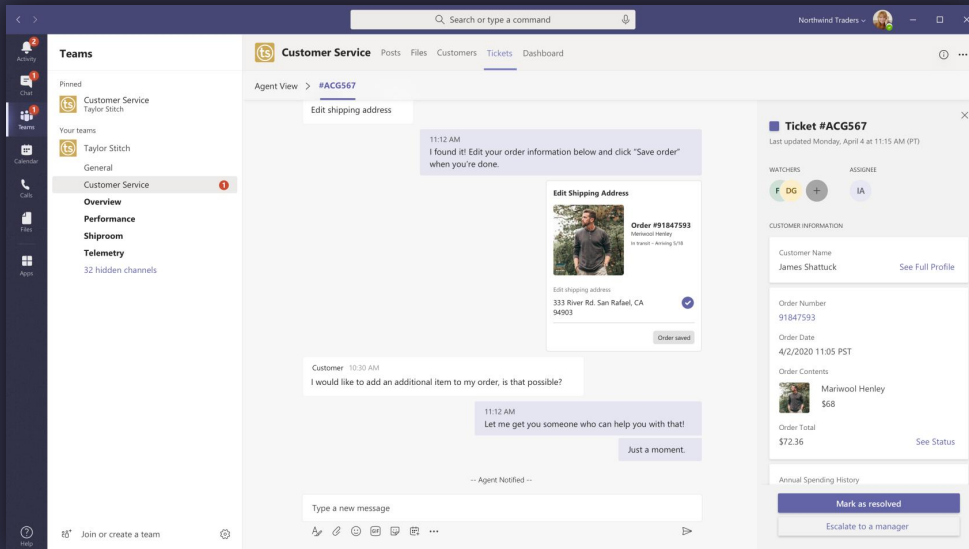
## Validation 2 of 3

Customer metadata is helpful to streamline support interactions

"Oh this is helpful, seeing the timeline of how they got here" – P1

"I love that you can see the order info on the side. I know Zendesk lacks that so that's really helpful because then you don't have to go into a separate thing and locate their order" – P2

"I love the customer information here on the right. And you can see who is the assignee/watchers." – P3



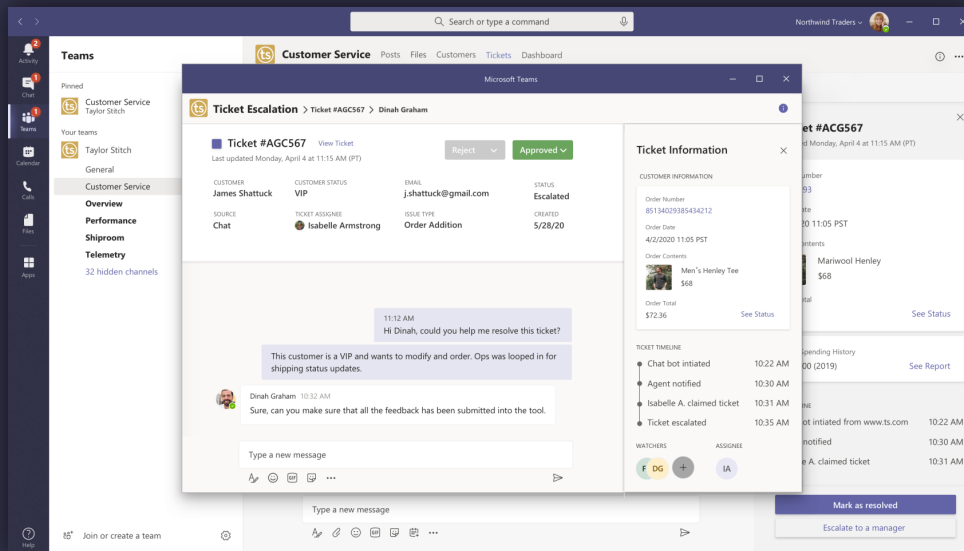
### Validation 3 of 3

Efficient manager escalation is valuable to save time and stay organized

"Having it all here means that you don't need to be paying attention to different screens. I really like that" – P3

"Right now we go on Slack and just ask if there's a manager available, not very efficient. This would make the internal workload much smoother" – P2

"You already have [everything] in there. So it's not like you have to be copying and pasting all that information" – P4



## Areas of improvement

Desire to see leaderboard in dash view

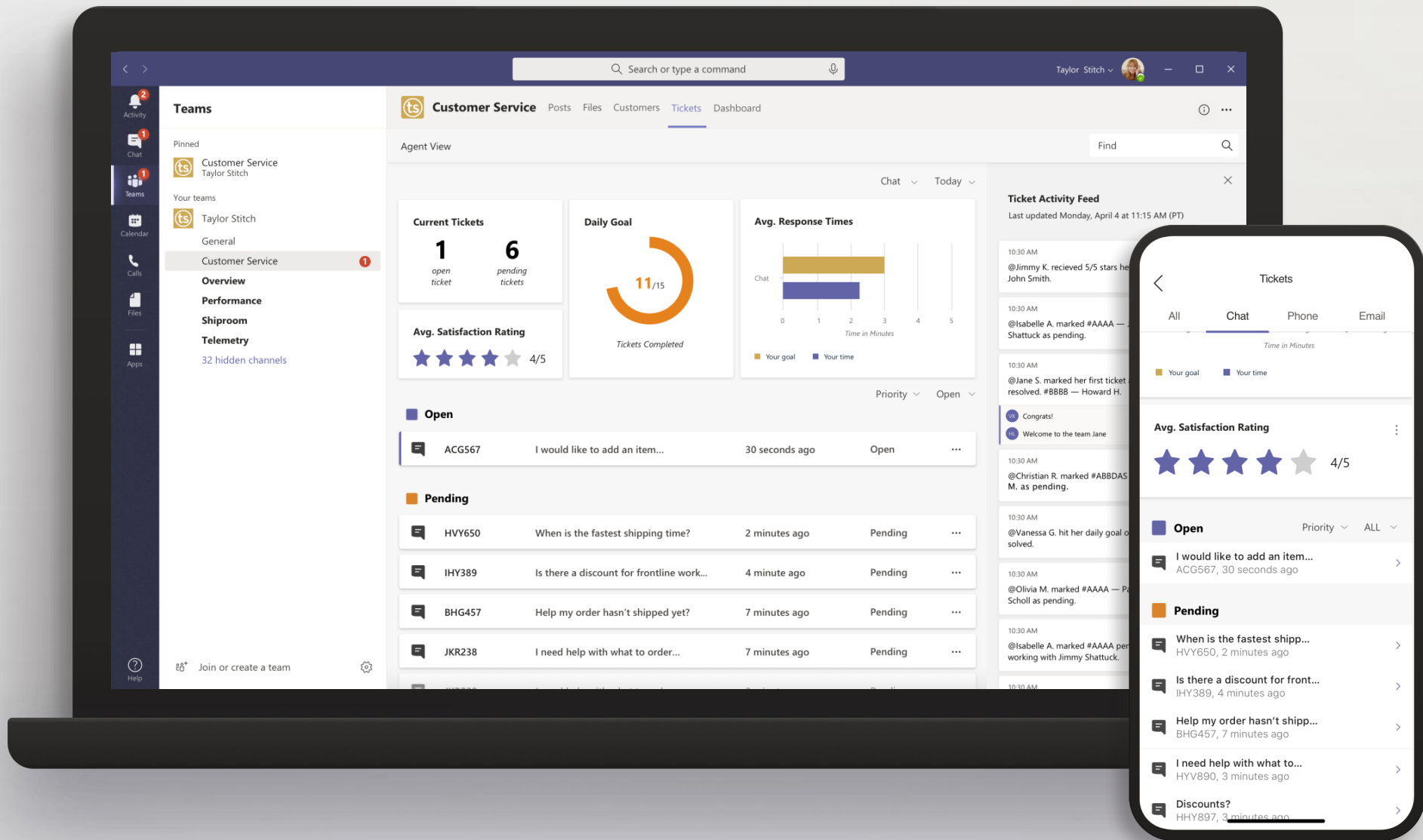
"It would be good to have some kind of leaderboard as well. So at first glance, they can see the numbers that each agent is moving." – P3

Goals are changeable by managing staff and should be conveyed to the agents

"We also **change response time goals** based on availability of the staff." – P4

Ticket queue priority needs clarification

"I think if there was a **different section for just the chat**. And if that could just come right up. I would know to immediately go to that even if I was like in the middle of responding to an email ticket." – P2



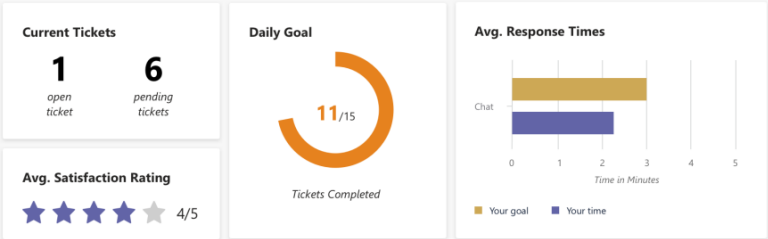
Teams

- Pinned
- Customer Service  
Taylor Stitch
- Your teams
- Taylor Stitch
  - General
  - Customer Service
  - Overview
  - Performance
  - Shiproom
  - Telemetry
  - 32 hidden channels

Customer Service Posts Files Customers Tickets Dashboard

Agent View

Find



Open

|        |                                |                |      |     |
|--------|--------------------------------|----------------|------|-----|
| ACG567 | I would like to add an item... | 30 seconds ago | Open | ... |
|--------|--------------------------------|----------------|------|-----|

Pending

|        |                                           |               |         |     |
|--------|-------------------------------------------|---------------|---------|-----|
| HVY650 | When is the fastest shipping time?        | 2 minutes ago | Pending | ... |
| IHY389 | Is there a discount for frontline work... | 4 minute ago  | Pending | ... |
| BHG457 | Help my order hasn't shipped yet?         | 7 minutes ago | Pending | ... |
| JKR238 | I need help with what to order...         | 7 minutes ago | Pending | ... |

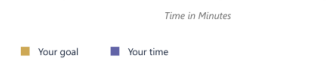
Ticket Activity Feed

Last updated Monday, April 4 at 11:15 AM (PT)

- 10:30 AM  
@Jimmy K. recieved 5/5 stars he...  
John Smith.
- 10:30 AM  
@Isabelle A. marked #AAAA —  
Shattuck as pending.
- 10:30 AM  
@Jane S. marked her first ticket  
resolved. #BBBB — Howard H.
- 10:30 AM  
Congrats!  
Welcome to the team Jane
- 10:30 AM  
@Christian R. marked #ABBDAS  
M. as pending.
- 10:30 AM  
@Vanessa G. hit her daily goal o  
solved.
- 10:30 AM  
@Olivia M. marked #AAAA — P  
Scholl as pending.
- 10:30 AM  
@Isabelle A. marked #AAAA per  
working with Jimmy Shattuck.
- 10:30 AM

Tickets

All Chat Phone Email



Open

I would like to add an item...  
ACG567, 30 seconds ago

Pending

- When is the fastest shipp...  
HVY650, 2 minutes ago
- Is there a discount for front...  
IHY389, 4 minutes ago
- Help my order hasn't shipp...  
BHG457, 7 minutes ago
- I need help with what to...  
HYV890, 3 minutes ago
- Discounts?  
HHY897, 3 minutes ago

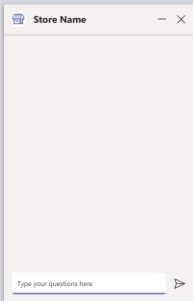
## **Component Library**

Leveraging existing Microsoft Teams design language and libraries, we created a component library designed for customer service associates.

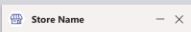
# Component Library

## Chatbot

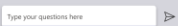
Window



Header



Text Entry Bar



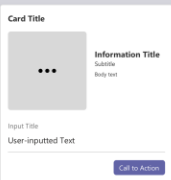
Banner



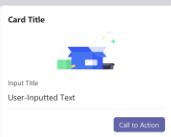
Suggestion pills



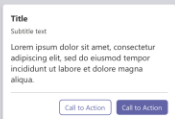
Card / Information



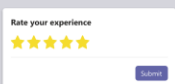
Card / Single-Input



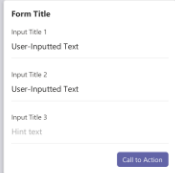
Card / Confirmation



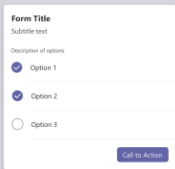
Card / Single Action



Form / Text Entry

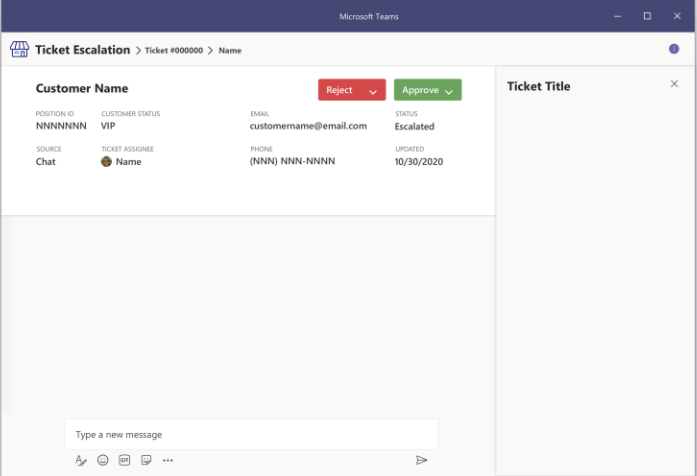


Form / Option Select

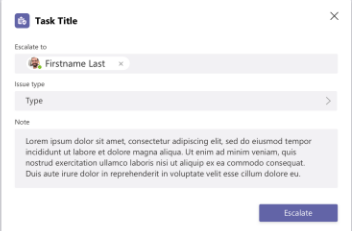


## Windows

Banner



Task Modal

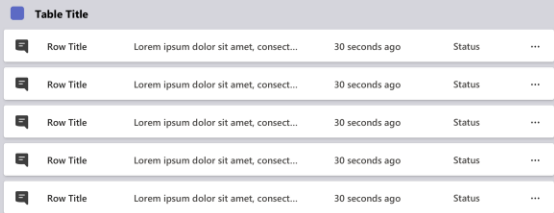


## Customer Service App

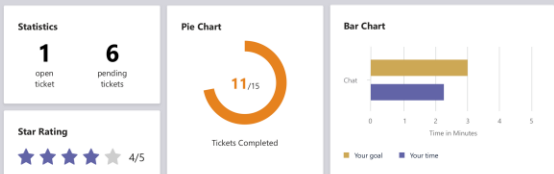
List Row



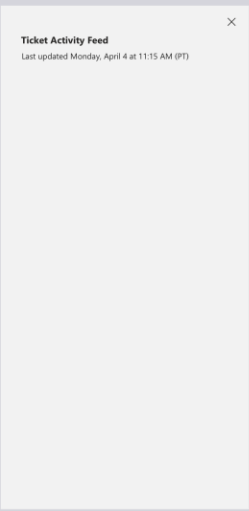
Table



Dashboard



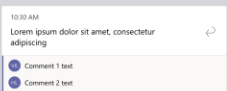
Right Rail Container



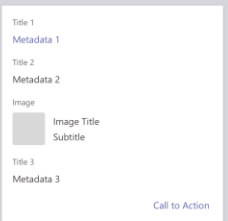
Right Rail / List Row



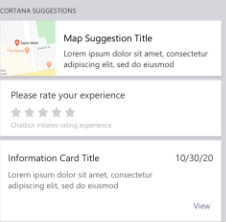
Right Rail / List Row expanded



Right Rail / Informational Card



Right Rail / Suggested Cards



Right Rail / List Row / Info [sm]

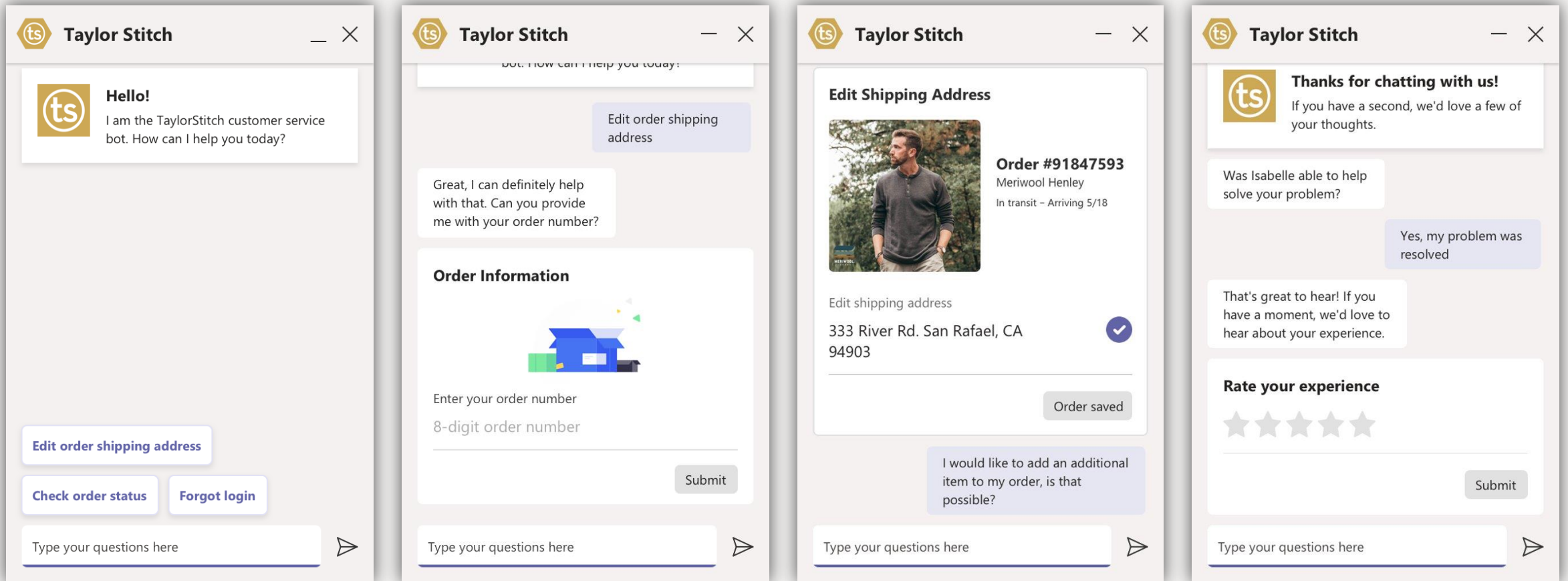


Right Rail / Notes



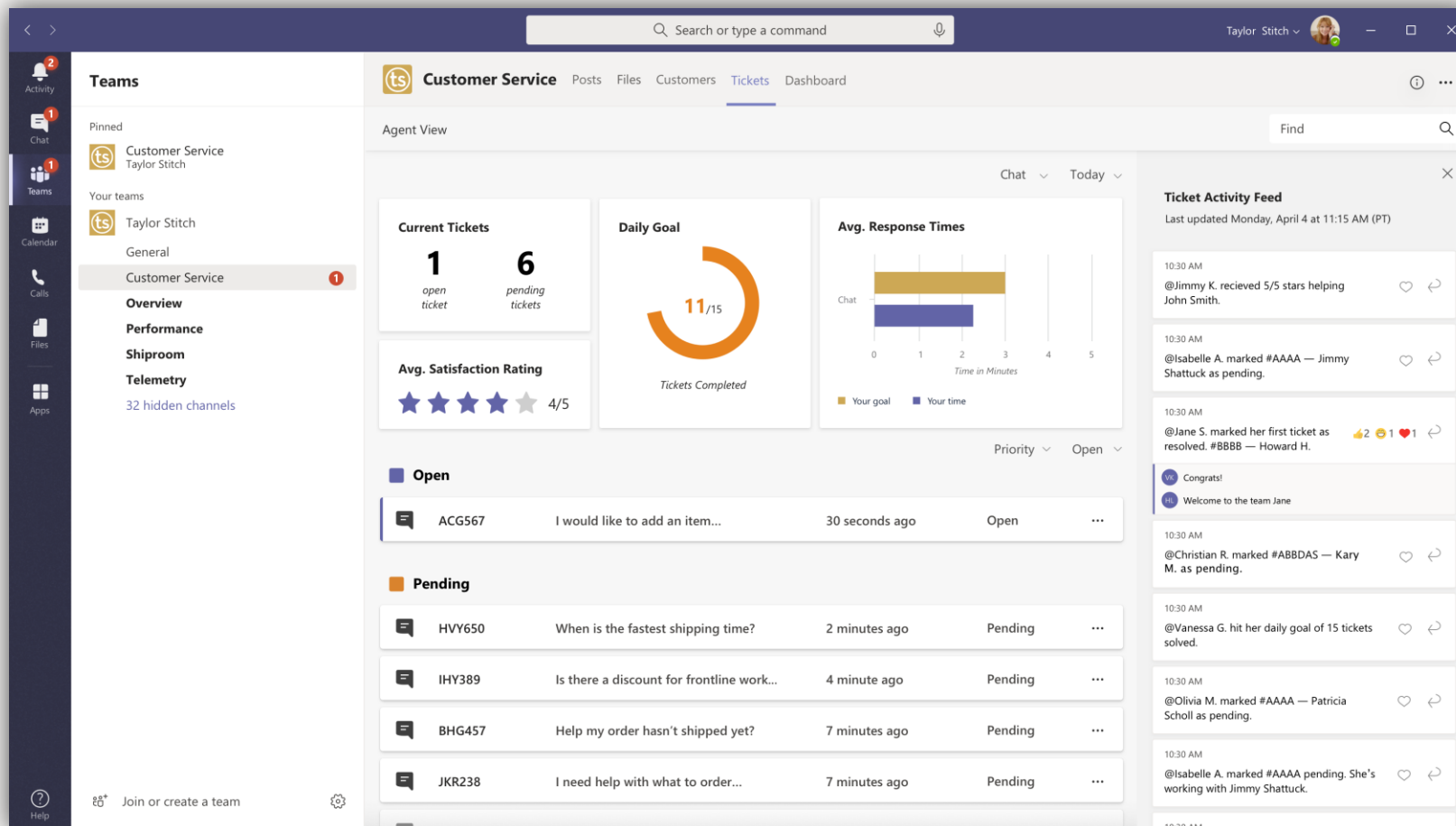
## **Final Designs**

Using the component library we put together high fidelity prototypes for each step of our ticket escalation scenario.



## Chatbot uses customizable cards to handle basic requests

Customer is greeted with suggested pills for to initiate a conversation quickly, and is served relevant cards based on their responses.



## CX Agent views their ticket queue

Currently on the chat view, the agent can see their goals for the day on the personal chat board, their pending and open tickets, and a feed of their coworkers activity.

Search or type a command

Northwind Traders

### Teams

Activity 2

Chat 1

Teams 1

Calendar

Calls

Files

Apps

Join or create a team

### Customer Service

Posts Files Customers Tickets Dashboard

Agent View > #ACG567

Edit shipping address

11:12 AM

I found it! Edit your order information below and click "Save order" when you're done.

#### Edit Shipping Address



**Order #91847593**  
Meriwool Henley  
In transit - Arriving 5/18

Edit shipping address  
333 River Rd. San Rafael, CA 94903

Order saved

Customer 10:30 AM

I would like to add an additional item to my order, is that possible?

11:12 AM

Let me get you someone who can help you with that!

Just a moment.

-- Agent Notified --

Type a new message

### Ticket #ACG567

Last updated Monday, April 4 at 11:15 AM (PT)

WATCHERS: F DG +

ASSIGNEE: IA

CUSTOMER INFORMATION

Customer Name: James Shattuck [See Full Profile](#)

Order Number: 91847593

Order Date: 4/2/2020 11:05 PST

Order Contents:

|                                                                                     |                 |
|-------------------------------------------------------------------------------------|-----------------|
|  | Mariwool Henley |
|                                                                                     | \$68            |

Order Total: \$72.36 [See Status](#)

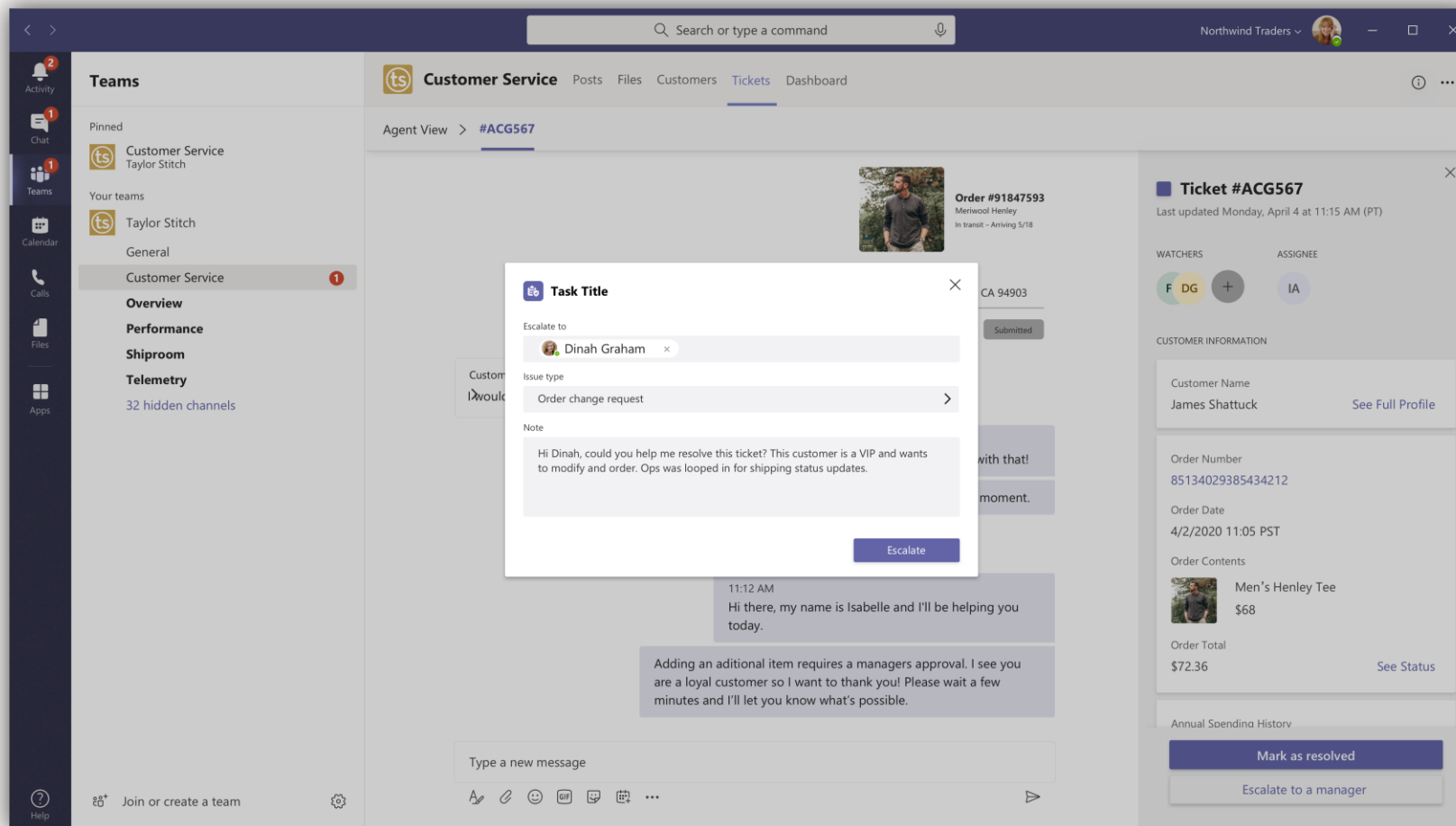
Annual Spending History

[Mark as resolved](#)

[Escalate to a manager](#)

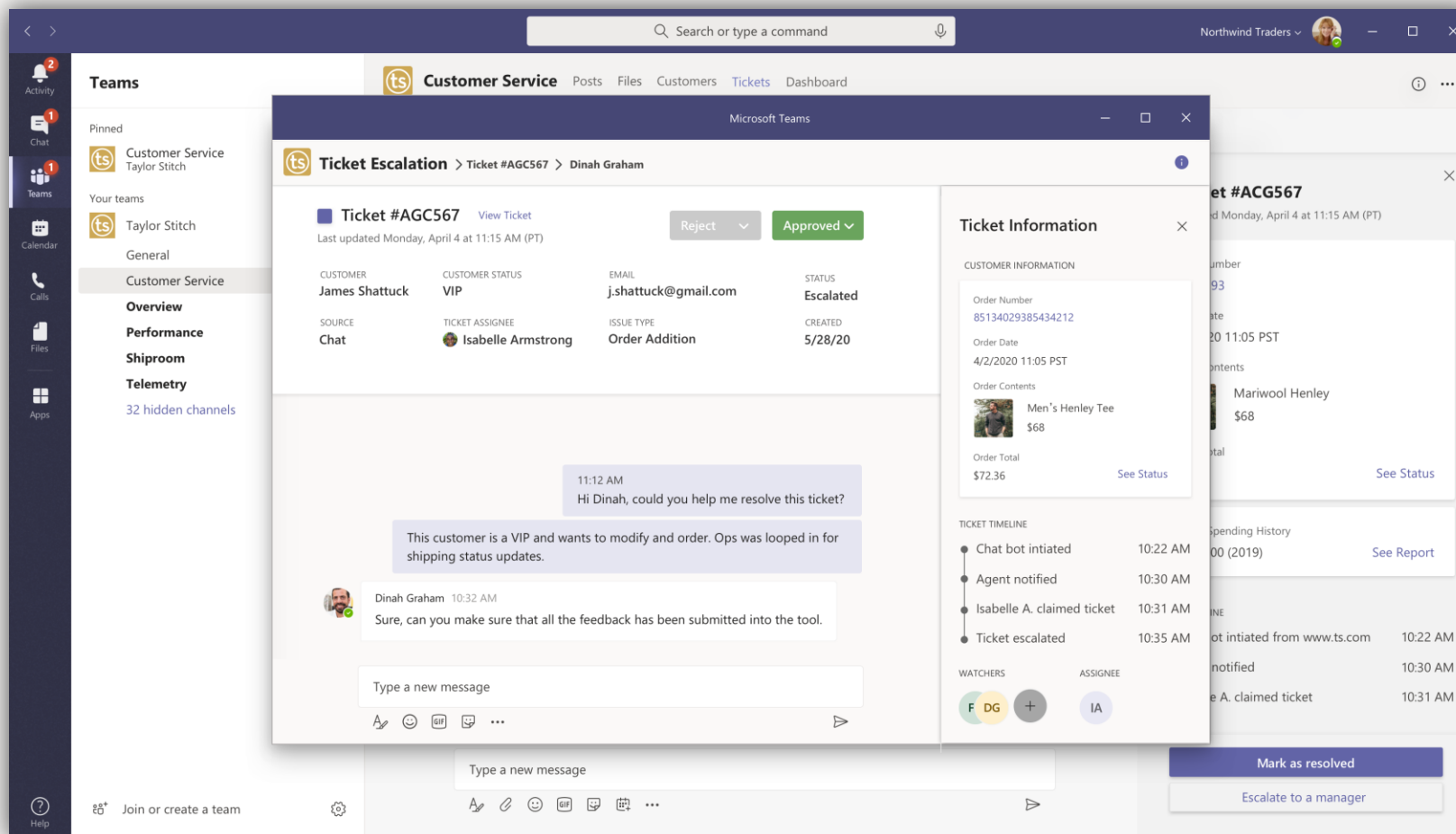
## Inside the ticket

When first entering a ticket, the CX Agent can see how the bot and the customer interacted, historical data collected by the bot and populated, and respond the customer.



## Escalating the ticket

Seeing that this is an issue they cannot solve, the CX associate forwards the ticket to their manager.



## Multi-window escalation

Here two windows are used to provide the CX Manager with more information about the ticket and actions they can take.

## Teams

### Work

 Customer Service  
Team 100%

### Work history

 Taylor Taylor

General

Customer Service 

Overview

Performance

Stopwatch

Activity

1 Customer Assigned



## Customer Service

Home | Files | Documents | Recent | Deleted

Agent View | **RAC6567**

Customer: Taylor Taylor

I would like to add an additional item to my order. Is that possible?

10:30 AM

Let me get you someone who can help you with that!

Send a Message

Agent Message

10:31 AM

Hi there, my name is Taylor and I'll be helping you today.

Adding an additional item requires a charge for shipping. I can give you a 50% discount on it if you'd like. Please wait a few minutes and I'll get you more information.

Customer: Taylor Taylor

Thanks! Thank you!

10:34 AM

Great! I can add that item to your order today and charge the original price. What item would you like to add?

Customer: Taylor Taylor

Wow, thank you so much! It's \$125.00!

Type a new message



## Ticket #AC6567

Customer Service | Agent Taylor Taylor



Margaret Taylor

100

Order Item

10:30 AM

Send Message

Amount Spending Order

\$125.00 (20%)

View History

2020-10-30

- Chat bot created from email order - 10:02 AM
- Agent created - 10:05 AM
- Customer assigned to agent - 10:07 AM
- Ticket created - 10:08 AM

Amount Spent

\$125.00

Customer Spending Order

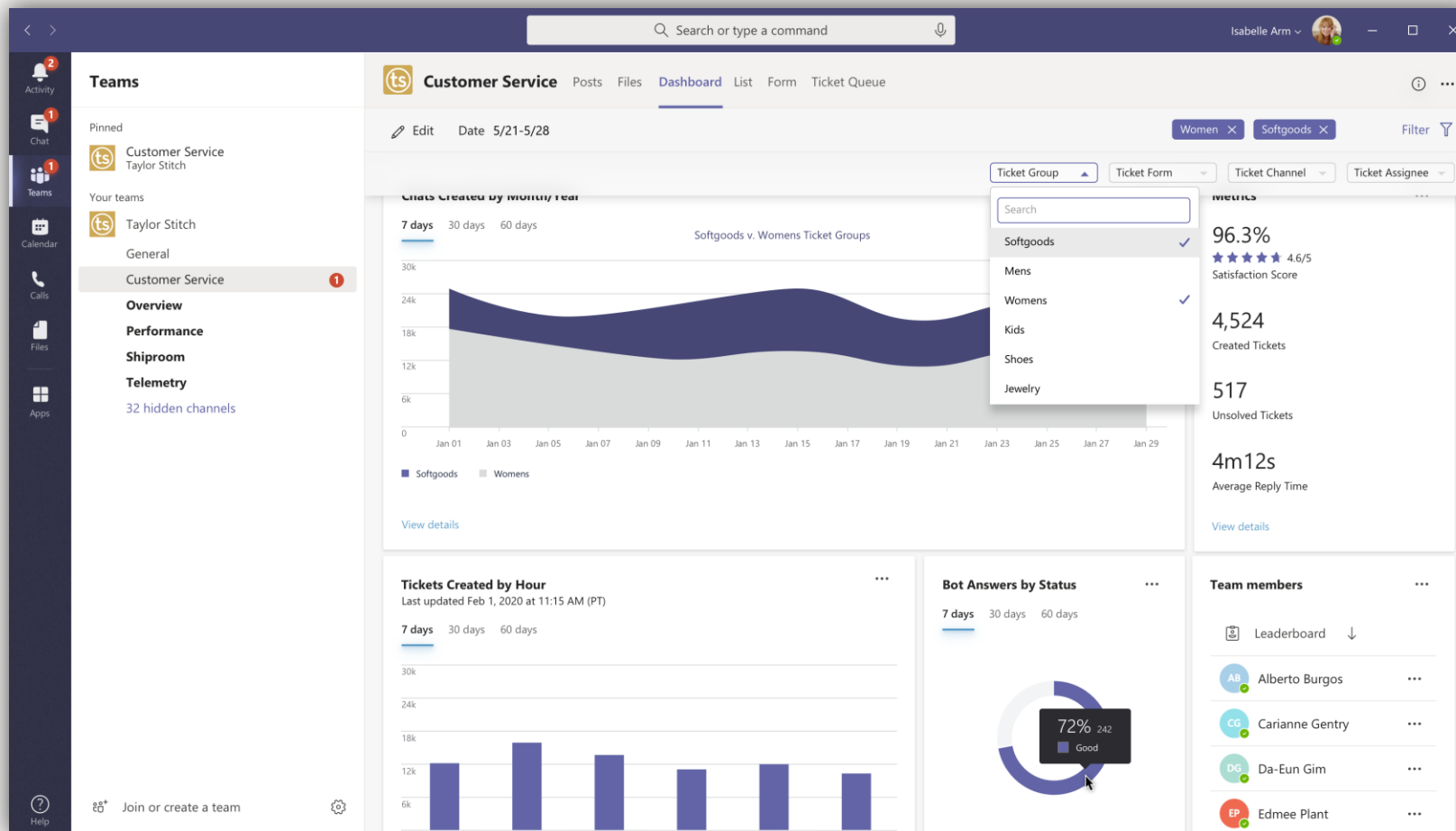
\$125.00

This amount is used to calculate the total amount spent on the order.

View

Mark as resolved

Showing 1 of 1 messages

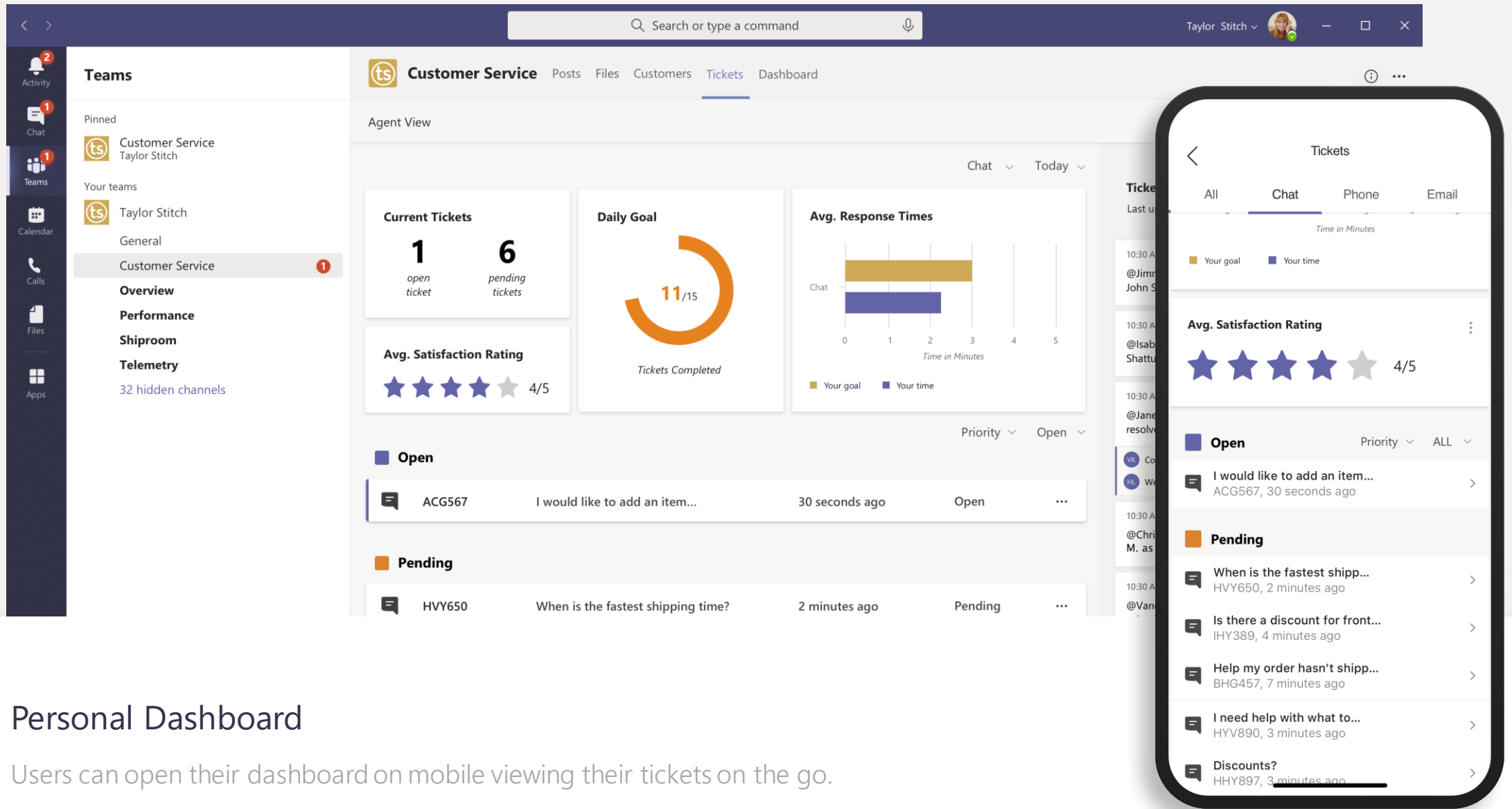


## Filtering the dashboard

Adjusting the filter allows for different variables to be viewed on the graph.

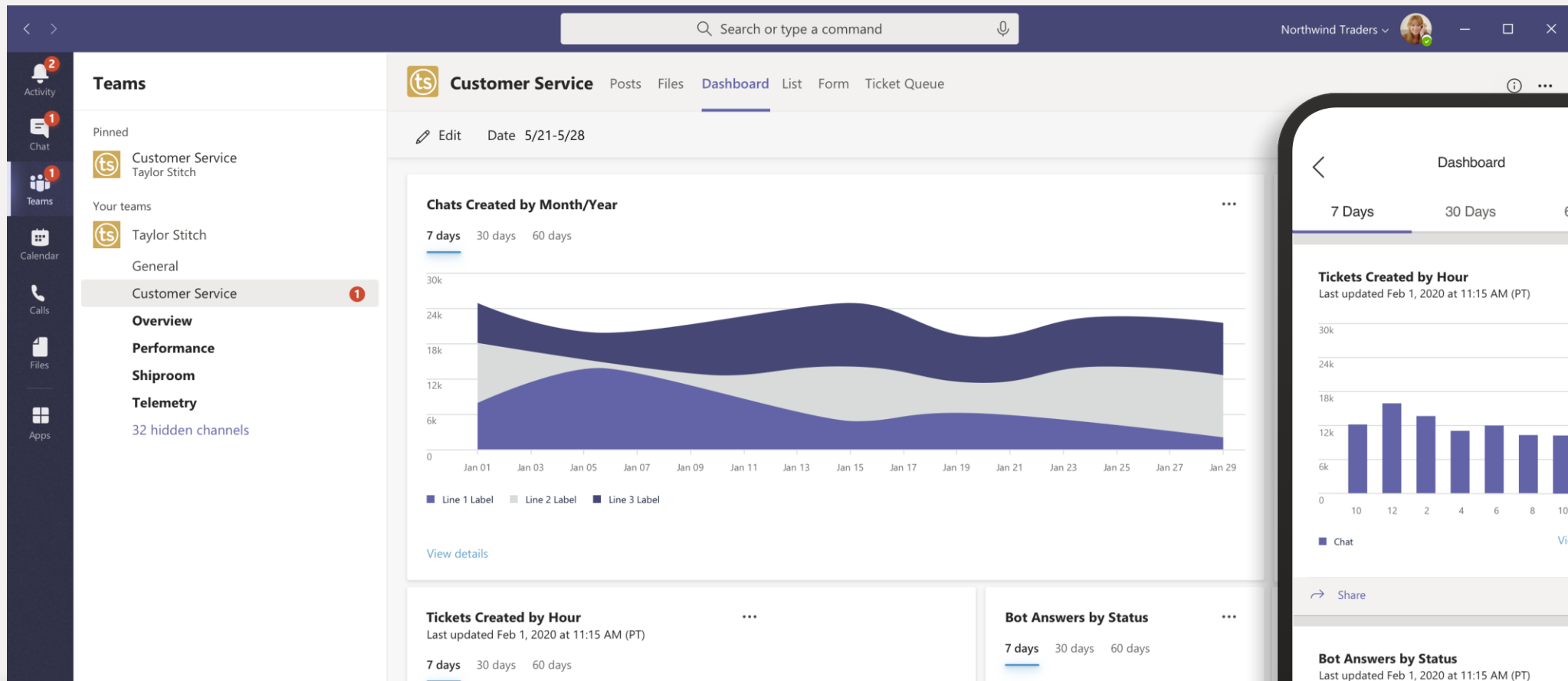
## **Mobile Designs**

While our research showed that CX agents do not typically work from their mobile devices, we wanted to showcase a few relevant mobile screens for on-the-go ticket management.



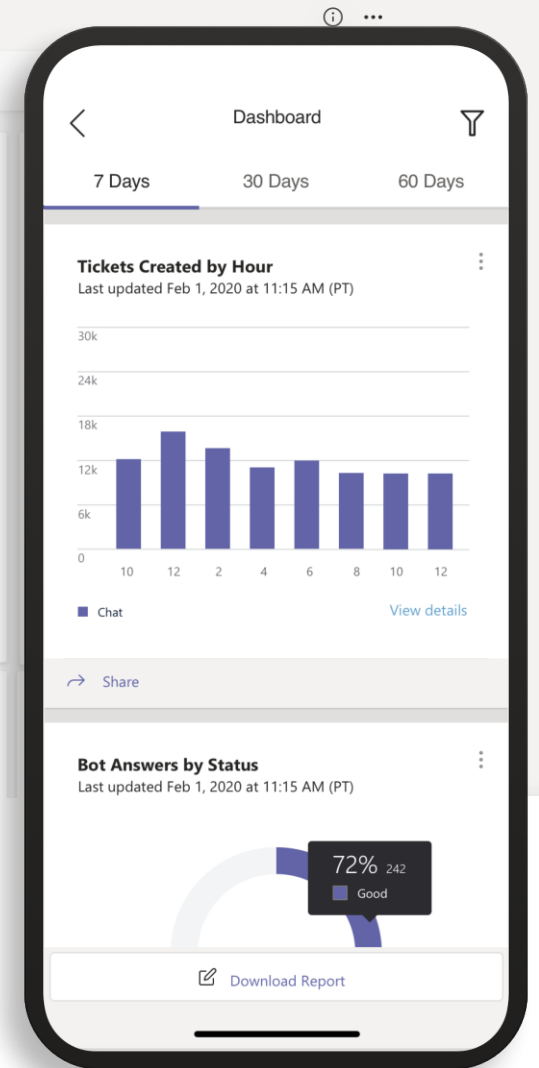
## Personal Dashboard

Users can open their dashboard on mobile viewing their tickets on the go.



## Manager Dashboard

Managers can check key analytics on mobile viewing the health of their team at a glance.



## **Accessibility**

We used Microsoft's guidelines to put together tabbing documentation for our designs.

Search or type a command

Taylor Stitch

## Teams

Activity Chat Teams Calendar Calls Files Apps

Pinned

- Customer Service Taylor Stitch

Your teams

- Taylor Stitch
- General
- Customer Service 1

Overview Performance Shiproom Telemetry

32 hidden channels

## Customer Service

Posts Files Customers Tickets Dashboard

Agent View

Find

1

Chat Today

**Current Tickets**

1 open ticket

6 pending tickets

**Daily Goal**

11/15

Tickets Completed

**Avg. Response Times**

Chat

0 1 2 3 4 5

Time in Minutes

Your goal Your time

**Avg. Satisfaction Rating**

★★★★★ 4/5

**Open**

|        |                                |                |      |     |
|--------|--------------------------------|----------------|------|-----|
| ACG567 | I would like to add an item... | 30 seconds ago | Open | ... |
|--------|--------------------------------|----------------|------|-----|

**Pending**

|        |                                           |               |         |     |
|--------|-------------------------------------------|---------------|---------|-----|
| HVY650 | When is the fastest shipping time?        | 2 minutes ago | Pending | ... |
| IHY389 | Is there a discount for frontline work... | 4 minute ago  | Pending | ... |
| HG457  | Help my order hasn't shipped yet?         | 7 minutes ago | Pending | ... |
| R238   | I need help with what to order...         | 7 minutes ago | Pending | ... |

2

Tab key 1 set focus on type for view overall  
 Spacebar or EnterKey to toggle options  
 Tab key 2 moves focus into the table  
 Shift + TabKey navigates you backwards

## Ticket Activity Feed

Last updated Monday, April 4 at 11:15 AM (PT)

10:30 AM

@Jimmy K. recieved 5/5 stars helping John Smith.

10:30 AM

@Isabelle A. marked #AAAA — Jimmy Shattuck as pending.

10:30 AM

@Jane S. marked her first ticket as resolved. #BBBB — Howard H.

Congrats!

Welcome to the team Jane

10:30 AM

@Christian R. marked #ABBDAS — Kary M. as pending.

10:30 AM

@Vanessa G. hit her daily goal of 15 tickets solved.

10:30 AM

@Olivia M. marked #AAAA — Patricia Scholl as pending.

10:30 AM

@Isabelle A. marked #AAAA pending. She's working with Jimmy Shattuck.

## Accessibility

Tabbing to navigate from chat to the table

Search or type a command

Taylor Stitch

### Teams

Pinned

- Customer Service Taylor Stitch

Your teams

- Taylor Stitch
- General
- Customer Service 1
- Overview
- Performance
- Shiproom
- Telemetry
- 32 hidden channels

### Customer Service

Posts Files Customers Tickets Dashboard

Agent View

Find

**Current Tickets**

1 open ticket, 6 pending tickets

**Daily Goal**

11/15 Tickets Completed

**Avg. Response Times**

Chat: Your goal (yellow bar), Your time (blue bar)

**Avg. Satisfaction Rating**

4/5 stars

Open

|                |                                           |                |         |     |
|----------------|-------------------------------------------|----------------|---------|-----|
| ACG567         | I would like to add an item...            | 30 seconds ago | Open    | ... |
| <b>Pending</b> |                                           |                |         |     |
| HVY650         | When is the fastest shipping time?        | 2 minutes ago  | Pending | ... |
| IHY389         | Is there a discount for frontline work... | 4 minute ago   | Pending | ... |
| BHG457         | Help my order hasn't shipped yet?         | 7 minutes ago  | Pending | ... |
|                | eed help with what to order...            | 7 minutes ago  | Pending | ... |

ArrowKeyDown set focus on first column item within table list  
Use ArrowKeyUp + Down to set focus on the next item in list

### Ticket Activity Feed

Last updated Monday, April 4 at 11:15 AM (PT)

- 10:30 AM @Jimmy K. recieved 5/5 stars helping John Smith.
- 10:30 AM @Isabelle A. marked #AAAA — Jimmy Shattuck as pending.
- 10:30 AM @Jane S. marked her first ticket as resolved. #BBBB — Howard H.
- 10:30 AM Congrats! Welcome to the team Jane
- 10:30 AM @Christian R. marked #ABBDAS — Kary M. as pending.
- 10:30 AM @Vanessa G. hit her daily goal of 15 tickets solved.
- 10:30 AM @Olivia M. marked #AAAA — Patricia Scholl as pending.
- 10:30 AM @Isabelle A. marked #AAAA pending. She's working with Jimmy Shattuck.

## Accessibility

Using arrow keys to move between tickets

Microsoft Teams interface showing the Customer Service dashboard. The left sidebar includes navigation options: Activity, Chat, Teams, Calendar, Calls, Files, and Apps. The main content area displays the Customer Service dashboard with various metrics and a list of tickets.

**Customer Service Dashboard Metrics:**

- Current Tickets:** 1 open ticket, 6 pending tickets.
- Daily Goal:** 11/15 Tickets Completed.
- Avg. Response Times:** Bar chart comparing 'Your goal' (approx. 3.5 minutes) and 'Your time' (approx. 2.5 minutes).
- Avg. Satisfaction Rating:** 4/5 stars.

**Ticket List:**

| Status  | Ticket ID | Customer Message                          | Time           | Status  | Actions |
|---------|-----------|-------------------------------------------|----------------|---------|---------|
| Open    | ACG567    | I would like to add an item...            | 30 seconds ago | Open    | ...     |
| Pending | HVY650    | When is the fastest shipping time?        | 2 minutes ago  | Pending | ...     |
| Pending | IHY389    | Is there a discount for frontline work... | 4 minute ago   | Pending | ...     |
| Pending | BHG457    | Help my order hasn't shipped yet?         | 7 minutes ago  | Pending | ...     |
| Pending | ...       | ...eed help with what to order...         | 7 minutes ago  | Pending | ...     |

**Ticket Activity Feed:**

- 10:30 AM: @Jimmy K. recieved 5/5 stars helping John Smith.
- 10:30 AM: @Isabelle A. marked #AAAA — Jimmy Shattuck as pending.
- 10:30 AM: @Jane S. marked her first ticket as resolved. #BBBB — Howard H.
- 10:30 AM: Congrats! Welcome to the team Jane
- 10:30 AM: @Christian R. marked #ABBDAS — Kary M. as pending.
- 10:30 AM: @Vanessa G. hit her daily goal of 15 tickets solved.
- 10:30 AM: @Olivia M. marked #AAAA — Patricia Scholl as pending.
- 10:30 AM: @Isabelle A. marked #AAAA pending. She's working with Jimmy Shattuck.

**Navigation and Search:**

- Search bar: Search or type a command
- Find bar: Find
- Navigation: Chat, Today
- Priority and Open filters

**Accessibility:**

- Spacebar or EnterKey on list item opens ticket

## Accessibility

Enter key or spacebar to enter a ticket

# Embedding Teams Web Controls into Shopify

EXTENDING THE SOLUTION

## Outside Microsoft Teams

Given that CX agents complete the rest of the work inside Shopify, we wanted to explore how we could embed the most useful Teams functionalities into Shopify.



## OPPORTUNITY

31%

of the e-commerce market is  
currently controlled by Shopify

1.2 million

E-commerce stores are currently  
hosted on Shopify

- Home
- Orders
- Products
- Customers
- Analytics
- Discounts

## Apps

## SALES CHANNELS

- Online store
- Point of sale

Settings

## Teams CRM

Microsoft

## Customers Ticket Queue

Chat Today

## Current Tickets

1

open  
ticket

6

pending  
tickets

## Avg. Satisfaction Rating

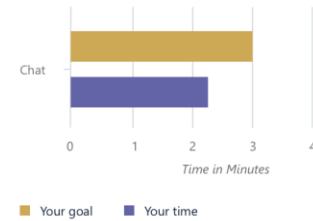
★★★★☆ 4/5

## Daily Goal

11/15

Tickets Completed

## Avg. Response Times



## Ticket Activity Feed

Last updated Monday, April 4 at 11:15 AM (PT)

10:30 AM  
@Jimmy K. recieved 5/5 stars helping John Smith.

10:30 AM  
@Isabelle A. marked #AAAA — Jimmy Shattuck as pending.

10:30 AM  
@Jane S. marked her first ticket as resolved. #BBBB — Howard H.

10:30 AM  
@Christian R. marked #ABBDAS — Kary M. as pending.

10:30 AM  
@Isabelle A. marked #AAAA — Jimmy Shattuck as pending.

10:30 AM  
@Isabelle A. marked #AAAA — Jimmy Shattuck as pending.

10:30 AM  
@Isabelle A. marked #AAAA — Jimmy Shattuck as pending.

10:30 AM  
@Isabelle A. marked #AAAA — Jimmy Shattuck as pending.

10:30 AM  
@Isabelle A. marked #AAAA — Jimmy Shattuck as pending.

10:30 AM

## Open

Time Open

ACG567 I would like to add an item... 30 seconds ago Open ...

## Pending

HVY650 When is the fastest shipping time? 2 minutes ago Pending ...

IHY389 Is there a discount for frontline work... 4 minute ago Pending ...

BHG457 Help my order hasn't shipped yet? 7 minutes ago Pending ...

JKR238 I need help with what to order... 7 minutes ago Pending ...

SRQ492 What's my order ETA? 8 minutes ago Pending ...

- Home
- Orders 46
  - All orders
  - Drafts
  - Abandoned checkouts
- Products
- Customers
- Analytics
- Discounts
- Apps

SALES CHANNELS

- Online store
- Point of sale

Orders

#9723

Print order Refund More actions



High risk of fraud detected

Before fulfilling this order or capturing payment, please review the Risk Analysis and determine if this order is fraudulent.

Review risk analysis

Escalate issue

Refunded items (3)



1

In Common

Mens - X-Small  
SKU: common-xs

\$25.00 x 1

\$25.00



1

Amersand Hat

One size  
SKU: amersand-hat

\$25.00 x 1

\$25.00



1

Plus Minus Crewneck

Mens - Small  
SKU: crewneck-s

\$25.00 x 1

\$25.00



Refunded

|                  |         |         |
|------------------|---------|---------|
| Subtotal         | 3 items | \$75.00 |
| Shipping         |         | \$14.00 |
| Tax              |         | \$0.00  |
| Total            |         | \$89.00 |
| Paid by customer |         | \$89.00 |

Notes

Edit

Accept payment with discount code.

Customer



Dominic Cole  
90 orders

CONTACT INFORMATION

Edit

dominic.cole@example.com  
No phone provided

SHIPPING ADDRESS

Edit

Dominic Cole  
633 Dibbert Square  
Nashville TN 37238  
United States  
707-541-3744 x4537

View map

BILLING ADDRESS

Home

Orders 46

All orders

Drafts

Abandoned checkouts

Products

Customers

Analytics

Discounts

Apps

SALES CHANNELS

Online store

Point of sale

&lt; Orders

#9723

Print order

Refund

More actions



## Shopify Manager

Issue escalation

Escalate to

Joan Kraft

Issue type

High risk of fraud

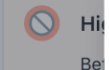
Add to

Taylor Stitch &gt; Shopify Manager

Notes

Hi Dinah, could you help me resolve this ticket? I'm not sure how to write this refund loss as of fraud, if it is.

Escalate



High risk of fraud

Be

f

Refund

3

8

8

8

8

8

8

8

8

8

8

Subtotal 3 items

Shipping

Tax

Total

Paid by customer

\$75.00

\$14.00

\$0.00

\$89.00

\$89.00

e if this order is fraudulent.

## Notes

Edit

Accept payment with discount code.

## Customer

Dominic Cole

90 orders

## CONTACT INFORMATION

Edit

dominic.cole@example.com

No phone provided

## SHIPPING ADDRESS

Edit

Dominic Cole  
633 Dibbert Square  
Nashville TN 37238  
United States  
707-541-3744 x4537

View map

## BILLING ADDRESS



- Home
- Orders 46
  - All orders
  - Drafts
  - Abandoned checkouts
- Products
- Customers
- Analytics
- Discounts
- Apps

## SALES CHANNELS

- Online store
- Point of sale

&lt; Orders

← →

#9723

[Print order](#) [Refund](#) [More actions](#)

## High risk of fraud detected

Before fulfilling this order or capturing payment, please review the Risk Analysis and determine if this order is fraudulent.

[Review risk analysis](#)[Escalate issue](#)

## Refunded items (3)



**In Common**  
Mens - X-Small  
SKU: common-xs

\$25.00 × 1

\$25.00



**Amperсанд Hat**  
One size  
SKU: amperсанд-hat

\$25.00 × 1

\$25.00



**Plus Minus Crewneck**  
Mens - Small  
SKU: crewneck-s

\$25.00 × 1

\$25.00



## Refunded

|                  |         |                |
|------------------|---------|----------------|
| Subtotal         | 3 items | \$75.00        |
| Shipping         |         | \$14.00        |
| Tax              |         | \$0.00         |
| <b>Total</b>     |         | <b>\$89.00</b> |
| Paid by customer |         | \$89.00        |

## Notes

[Edit](#)

Accept payment with discount code.

## Customer



Dominic Cole  
90 ord

## CONTACT

domin  
No ph

## SHIPPING

Domin  
633 D  
Nashv  
United  
707-5

[View n](#)

## BILLING

JK

Joan Kraft

— ×

High risk of fraud detected  
Order #9743

[Review risk analysis](#)

Hi Joan, could you help me resolve this issue? I'm not sure how to write this refund loss as a fraud, if it is.

Yes, I'll jump in and take it over from here.

Type something here



Home



Orders

46



Products



Customers



Analytics



Discounts



Apps

SALES CHANNELS



Online store



Point of sale



Settings

# Customers

Import

Export

Add customer

All New Returning Abandoned checkouts Email subscribers

Filter customers

Showing 50 customers



James Shattuck  
Tucson, Arizona, US



James Shattuck  
Customer for 9 months  
(520) 621-5130  
jshattuck@gmail.com



\$497.76 spent



Maria-João Prado Oliveira  
São Paulo, Brazil

39 orders

\$65,289.78 spent

This customer is awesome. Make sure to treat them right!



Jürgen Müller  
Frankfurt, Germany



Omar Yussuf  
Ottawa, Canada

2 orders

\$189.24 spent



Arundhati Bhattacharya  
Dehli, India

2 orders

\$56.71 spent



Anonymous Customer

2 orders

\$1,325.24 spent



Taylor Stitch

Search

 Isabelle Arm

Home

Orders46

Products

Customers

Analytics

Dashboards

Reports

Live view

Discounts

Apps

SALES CHANNELS

Online store

Point of sale

< Analytics

Reports

Share to Teams

Create custom report

Sales

Gauge the success of your business by comparing sales across products, staff, channels, and more.

ORDERS LAST 30 DAYS

\$66,904.39

Sales over time

234 orders

Sales by product

104 products

Show all

Acquisition

Increase visitor engagement by knowing where your visitors are coming from and measuring the success of your campaigns.

VISITORS LAST 30 DAYS

45,658

Visitors over time

43,072 unique

Visitors by referral source

16 sources

Show all

Customers

Gain insights into who your customers are and how they interact with your business.

CUSTOMERS LAST 30 DAYS

197

New customers over time

197 customers

Top spending customers

197 customers

Show all

Behavior

Improve your store by understanding how visitors move through your site.

REACHED CHECKOUT LAST 30 DAYS

6%

Abandoned checkouts over time

363 checkouts

Visitors by landing page

6 visited pages

Show all

Finances

View a breakdown of your store's finances including sales, refunds,

Custom

Create custom reports that have tailored dimensions and metrics to

 Taylor Stitch 

 Search

 Isabelle Arm

Home

Orders 46

Products

Customers

Analytics

Dashboards

Reports

Live view

Discounts

Apps

SALES CHANNELS

Online store

Point of sale

Analytics

Reports

Share to Teams

Create custom report

Sales

Gauge the performance of your products and services

ORDERS LAST 30 DAYS

\$66,000

Sales over time

Sales by product

Custom

Gain insight into your customers with your custom reports

CUSTOMERS LAST 30 DAYS

197

New customers

Top spending customers

197 customers

Finances

View a breakdown of your store's finances including sales, refunds, and taxes

Acquisition

Understand how visitors are coming to your store by knowing where your visitors are coming from and ensuring the success of your campaigns.

43,072 unique visitors

16 sources

Show all

Understanding how visitors move through your store

LAST 30 DAYS

363 checkouts

6 visited pages

Visitors by landing page

Custom

Create custom reports that have tailored dimensions and metrics to your business

 Share reports with your team 

Which team would you like to share with?

Customer Service 

Which reports would you like to share?

☒ Sales

☒ Acquisition

☒ Customers

How often should these reports be updated?

☐ As they are received

☒ Every day at: 11:00 AM 

Done

## Next Steps



01

Explore how customers could configure integrations and customizable components



02

Research with a larger set of users to further validate our designs



03

Develop flows and logic for additional user scenarios to better encompass more CX tasks

## **Reflection & Key Learnings**

Exercising user-centered design with the guidance of leaders in an exploding industry was an invaluable learning experience.

In an atmosphere of uncertainty, we felt empowered to work in a product space that has meaningful impact on improving communication and bringing teams closer together.

# Thank you

**Alex Powell**

For your guidance, mentorship, and support

**Arvind Muthukrishnan**

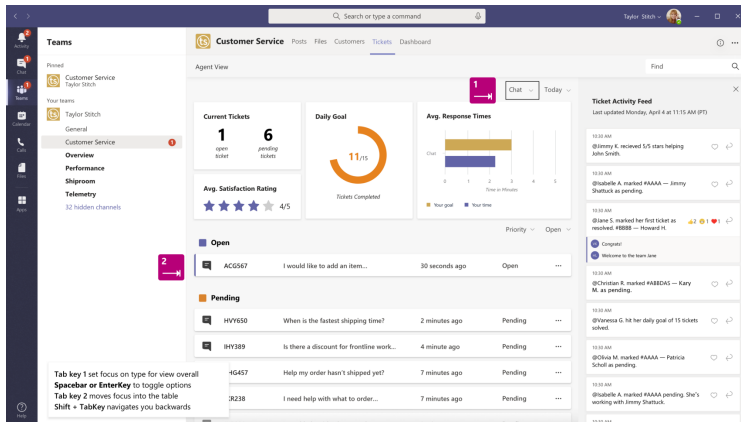
For your resources, expertise, and assistance

**Angela Nelson**

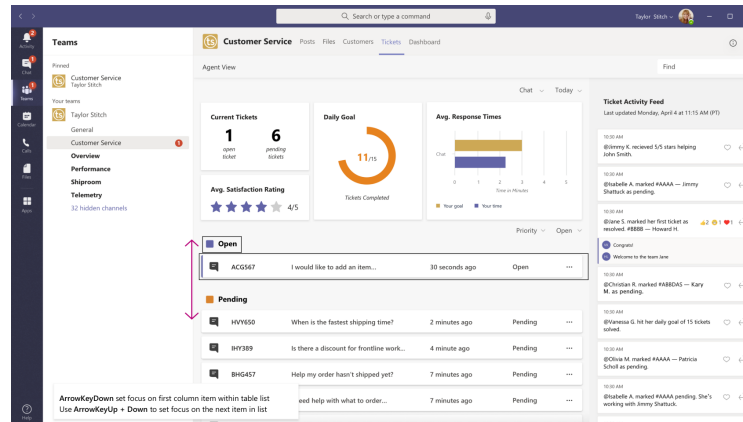
For connecting us to this opportunity!



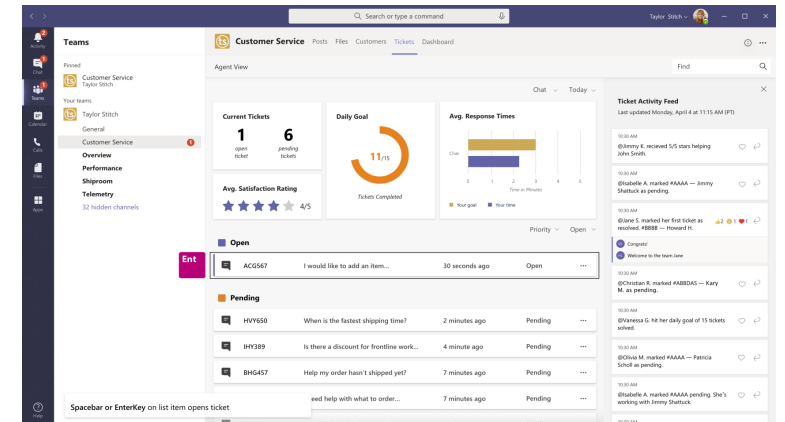
# Appendix



Entering the table



Navigating Tickets



Entering a ticket