HOW WE DELIVER

Celfocus Design Methodology: Taking the Customer Experience to New Heights

Key Takeaways

Understanding why Customer Experience matters.

How Design combines with different delivery methodologies.

Learning more about Celfocus Design Methodology.

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The Customer Experience Matters: Customer Journeys as a Differentiator

The digital revolution has shifted the power from organisations to customers, which now have much tighter control over the experience. Control equals power and determines the relationship dynamic.

Throughout the years, companies have struggled to provide a satisfying customer experience due to several reasons: new IT systems, regulation, or even various legal requirements. Customer experience is about placing customers' needs at the centre of the business strategy, and companies have to ensure that it's flawless across all the touchpoints and along the whole of the customers' journey. Focusing on understanding and improving customer journeys becomes the differentiating factor.

One of the major challenges for UX and UI designers is to **maintain consistency across several systems** throughout the overall customer experience. The aim must be to find a balance between consistency and respecting the idiosyncrasies of each system by building solutions that are unique and homogenous between each other.

Imagine logging into a Communication Service Provider (CSP) e-commerce platform to upgrade your current service bundle. After browsing and finding the right package, you still have questions. What do you do next? Imagine now that your CSP gives you the possibility to

go to a different platform but, because it is older and less technologically advanced, the look and feel are different, and the experience changes. You struggle to find an answer and know that calling the contact centre means waiting and having to explain everything several times. We all know where this is heading. For you, it is still the same company but, from a customer journey perspective, it is something else

This reality is not specific to CSP; it also happens in other industries. Take the Financial Services sector, for example. As you may have already experienced first-hand, different channels present different experiences and information, especially when you shift from assisted channels to self-service channels.

Imagine that you want to apply for a loan via a bank app. For some reason, the app stops loading. You then call your bank and ask to continue the process. But, because the information available on the app is different from the one the bank employee has access to, it is not possible to recover the data you inserted while using the app.

Agents on the assisted channels are looking at a group of applications that are different from the ones feeding the self-service channels. These glitches generate frustration and impact sales service quality. Having a holistic view of the customer experience means having the same graphical language on all touchpoints and platforms, reinforcing the brand, and creating service differentiators that can be challenging to copy by the competition.

Touchpoints Present Endless Possibilities

Mass customisation is hailed as the last frontier in customer experience. The ability to provide a personalised solution through any channel selected by the customer, while taking advantage of economies of scale, remains a goal for many industries.

Regardless of the channel, ensuring that the journey remains seamless and context-based is becoming increasingly challenging, leading companies to continue lagging in delivering exciting experiences, no matter their digital transformation efforts.

Being able to engage customers through different channels opens the organisation to the world and also adds to the bottom-line.

However, this opportunity can become a threat when it is poorly executed, leading to a dissonant experience with gaps between expectation and reality and a frustrated customer. By integrating all channels and prioritising journeys over transactional experiences, companies are now in a position to deliver a truly omnichannel experience.

Based on a global footprint and track record, Celfocus understands the challenges companies face when embarking on a digital transformation journey. To mitigate risk and accelerate project delivery, Celfocus uses a **dedicated methodology** for customer experience and excellence that is part of our Delivery Framework, presented next.

Celfocus Delivery Framework

The ability to execute changes in complex IT architecture, to assure high-quality standards, and solution sustainability is what any organisation demands when launching new products and services.

Celfocus Project Management methodology uses a proprietary "Delivery Framework" and was designed to respond to the most demanding and fast-paced projects.

This framework **consists of a set of processes, assets, and reusable components** laid out to respond to project failure risk and to accelerate developments, allowing Celfocus to address a very dynamic and demanding business with a very high success rate. The framework is ISO9001:2015 certified and comprises Celfocus Project Management methodology, the Solution Framework, and Celfocus's Agility Flow.

To determine the most suitable delivery methodology for each context, Celfocus focuses on understanding the nature of the customer and the challenge to be tackled.

Waterfall

When definition, not speed, is key to success.

Agile

When focus on delivering business value on a constant pace is more important.

DevOps

When E2E cooperation and efficiency are a must.

Solution Framework

The Solution Framework is Celfocus's certified methodology for delivering Waterfall projects and professional services. In a waterfall delivery approach, the Design team is engaged during the **Specify** phase. During this phase, UX designers work together with business analysts and architects to understand challenges, refine scope, and build journeys. The scope is broken into packages, setting priorities and timelines that help teams stay focused and deliver faster.

Customer Solution Framework

Setup → Specify → Design → Build → Validate → Transition → Deploy → Support

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After the scope is well defined, UX designers transform its features into journeys and these into prototypes that are tested by users and validated by the business in the **Design** and **Build** phase. UI designers then build visual identity and design systems while Front-End developers shape the assets to share with the development team.

The packages are developed in cycles, and each includes the creation of journeys, prototypes, UI design, and Front-End assets.

Celfocus Agility Flow

Celfocus Agility Flow is Celfocus's certified methodology for delivering Agile products, projects, and services. It maximises business value by empowering teams with greater flexibility on requirement introduction and prioritisation while providing quick and incremental system functionalities.
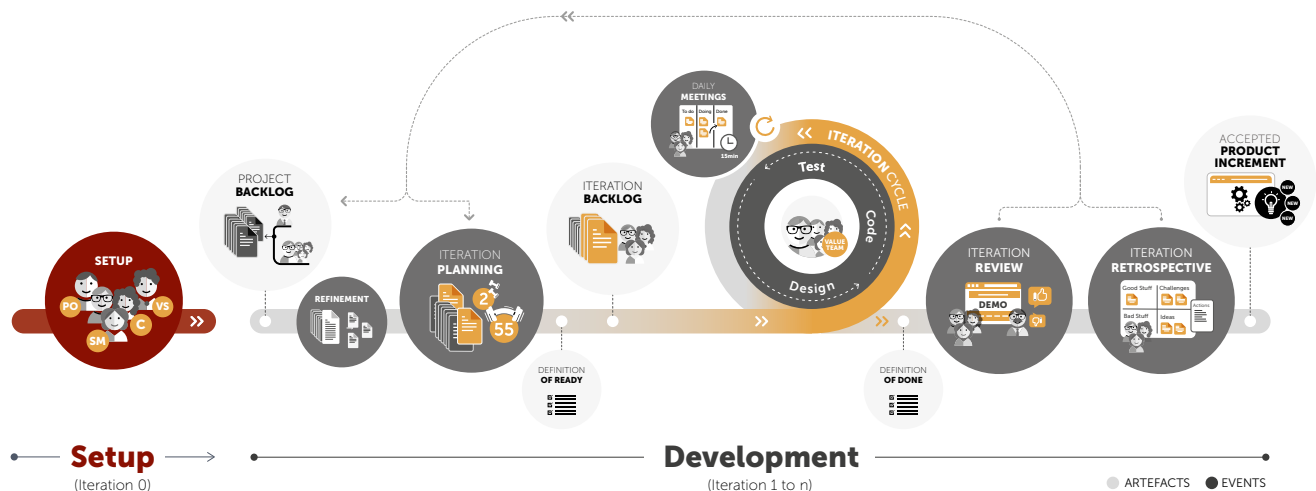
The Agile methodology enables **fast value delivery**, with higher quality and predictability, and a greater ability to respond to change.

The pressure to deliver is a significant obstacle for the Design team, as it removes valuable time for research, to analyse data, interview users, and execute a benchmark analysis before developing.

To tackle this obstacle, Celfocus incorporated Agile with a value stream composed of a group of architects, analysts and UX designers, who integrate the project in the Setup phase to understand the overall ecosystem: **Technology, Business, Users.** The value stream can start up to 2 months earlier than the implementation stream and runs in parallel, providing the necessary resources for UI, Front-Ends, and developers to build the assets and deliver a live solution.

After Setup, the UX team starts designing the journey with Ideation, Prototype, and Test cycles. This is the moment when UX starts working in real sprints.

At the end of each UX cycle, which finish with the delivery of medium-fidelity prototypes to UI, the UI designers create the visual designs, reusable components and templates that are part of the design system. The deliverables are handed over to the Front-End and Full-Stack developers that will transform the UI into real code.
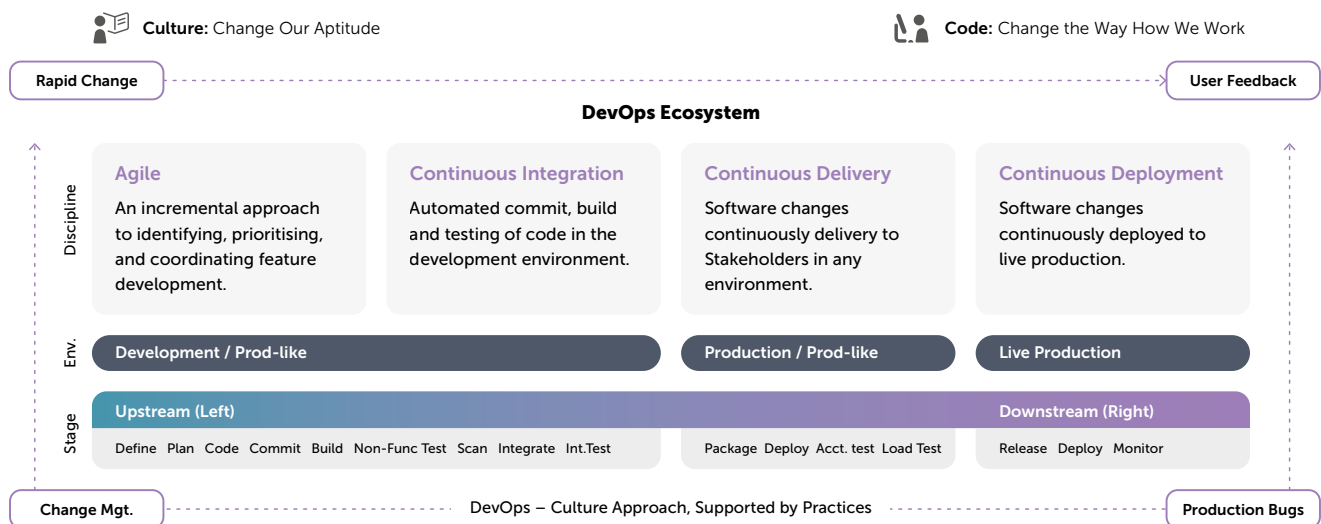
When projects move to a mature development phase, UX and UI designers migrate from the value stream to the implementation streams, being always one or two steps ahead of the development.

UX Research →

UX
Design Journeys and Prototypes

UI
Build Assets and Templates

FE
Build Assets and Templates
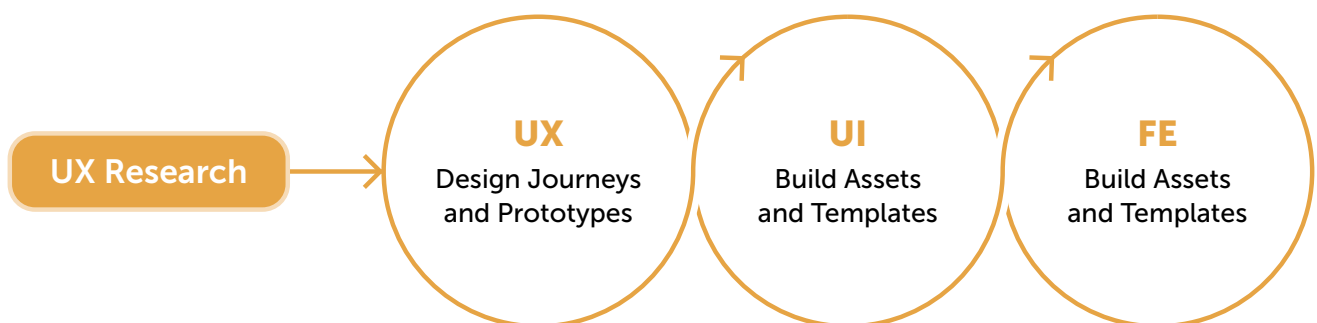
DevOps Delivery Approach

The DevOps approach seeks to **consolidate application development and deployment into a more streamlined process,** shifting some of the operation team's responsibilities back to the Development team to facilitate continuous development, integration, delivery and monitoring processes.

Culture: Change Our Aptitude

Code: Change the Way How We Work

Rapid Change

User Feedback

DevOps Ecosystem

Discipline	**Agile** An incremental approach to identifying, prioritising, and coordinating feature development.	**Continuous Integration** Automated commit, build and testing of code in the development environment.	**Continuous Delivery** Software changes continuously delivery to Stakeholders in any environment.	**Continuous Deployment** Software changes continuously deployed to live production.

Env.

Development / Prod-like | Production / Prod-like | Live Production

Stage

Upstream (Left) | Downstream (Right)

Define Plan Code Commit Build Non-Func Test Scan Integrate Int.Test | Package Deploy Acct. test Load Test | Release Deploy Monitor

Change Mgt.

DevOps – Culture Approach, Supported by Practices

Production Bugs

Currently, the Celfocus DevOps framework is mainly used once projects move to the **Support** phase. At this stage, the core of the design work has already been delivered, journeys are built, and the UI and Front-end assets are documented in a **design system** ready to be used by the developers.

A dedicated Design team composed of UX and UI designers and Front-End developers provide support to multiple projects in the **Support** phase and, if needed, integrate the team for specific demands. This team is also responsible for identifying challenges and opportunities guaranteeing the continuous improvement of all projects under **Support**.

In both Agile and Waterfall approaches, the team performs the same activities from research to development support. The delivery framework dictates when those activities are done; the end goal is always to provide customer experience excellence that is seamless and continuous.

Integrated into Celfocus Delivery Framework, the proprietary "Design Methodology" answers to the fundamental question of how to think about customers and their needs when building applications and solutions. Next, an in-depth presentation of the methodology and its impact on the customer experience journey

Celfocus Design Methodology

Customer experience includes all aspects of the interaction with the company, its services, products, and touchpoints.

Designing good experiences requires a multidisciplinary approach, with expertise in different areas like user research, interaction design, graphic design, digital marketing, front-end development, and other areas such as customer business and technology. It should take into consideration the following:
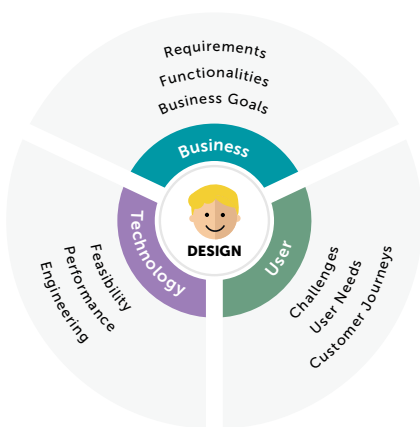
Users: Develop solutions focused on customer needs and desires, involving them in the design process.

Business: Identify business goals and assure that the designed solution fulfils business needs and is future proof.

Technology: Guarantee the applicability of the proposed solutions with a focus on usability and system performance.

Celfocus uses a research and delivery framework, engaging design from the customer's perspective. This is an important cornerstone in the way Celfocus's believes a great experience can be achieved. One of the key principles of Celfocus's projects is to involve customers in the design process.

The involvement of key stakeholders not only improves the project's output but also facilitates the decision-making process and the validation cycles. The Design team is involved in the project's early stages, working together with the Functional Analysts and the Product Owners.

Combining Design and Business with technical ecosystem understanding results in a **customer-centric solution, responding to business's goals and technical demands.**

The 3 Ds Approach: Designing for Customers

- **Does your organisation need assistance in idealising new products?**
- **Do you feel there is space to improve customer experience?**
- **Is the organisation involved in deploying multi-channel solutions?**
- **Do you think users should be part of the process?**

If the answer to these questions is YES, then Celfocus Design Methodology and our dedicated team of experts can support your design objectives. What sets Celfocus Design team apart is the total dedication and focus on supporting organisations across the globe remotely or on-site.

The knowledge gained from participating in consumer and enterprise projects; assisted and unassisted channels; mobile and non-mobile devices; and in remote and on-site projects, has enabled the continuous development of a rich and tested methodology leveraged by the use of different techniques and a delivery framework where Customer Experience is the central pillar.

From Celfocus's perspective, Design is a corporate responsibility shared among different stakeholders. This is why our teams are multidisciplinary: to better understand both business requirements and technical specifications with customer involvement across all design phases.

The 3D Approach

1 Discover   2 Define   3 Develop
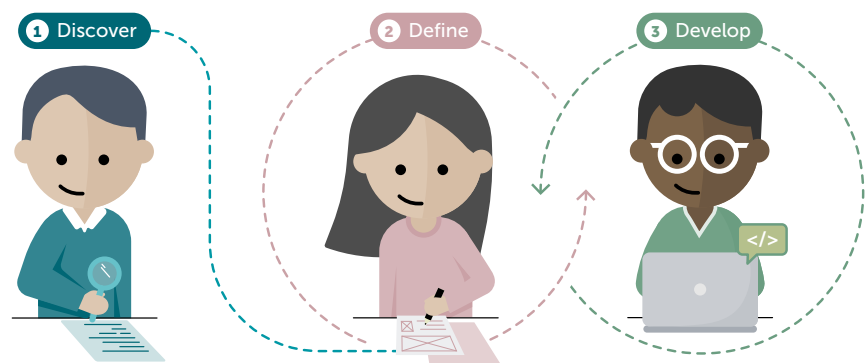
The Discover Phase
Empathise | Learn | Share

During the Discover phase, UX designers immerse themselves in the project to get the background needed to make design decisions. The goal is to support the design with quantitative and qualitative data and depend less on generic best practices and personal assumptions.

Celfocus and its partners work as a team during this phase and aim at understanding the client's context in detail by using different perspectives which include learning more about the customer, competition, business, processes and the applications used.

Some of the deliverables and techniques used during this phase include:

- **Project definition** as to scope, stakeholders and goals
- **Client environment analysis**
- As is analysis of the **current solutions and KPIs**
- **Stakeholder mapping**
- Shadowing, **interviews**, and immersion
- **Personas** definition

- Design sprint for **ideation** sessions
- **Benchmarking**

At the end of this phase, UX designers will have a deeper understanding of customer's challenges, needs, and goals. During the Discover phase, more than meeting the users' expectations, the team wants to gather all the necessary insights to create solutions that will shape their expectations.

The Define Phase
Ideate | Prototype | Test

The Define phase begins with a broad exploration of possibilities for serving the unmet needs revealed in the Discover phase and moves through ideation, multiple prototyping, and concept enrichment. This is a collaborative and iterative phase with an active customer and user participation, resulting in the project scope conceptualisation.

By using a myriad of techniques and tools, the project team can quickly present the first proposals, enabling fast feedback cycles, lower costs, and risks.

Some of the deliverables and techniques used during this phase include:

- **Information architecture,** and card sorting or tree testing to test with users.

- **Paper Prototyping** for rough validation of concepts.
- **Interactive prototypes** to validate feasibility with the tech team and usability/desirability with users.
- **Customer's journeys** definition.
- **Mapping user stories** with Customer journeys.
- **Design sprints** to tackle challenges for specific journeys.

At the end of this phase, UX Designers will have designed the information architecture, customer journeys and interactive prototypes tested with real users.

Having cycles or sprints with ideation sessions, multiple prototyping, and testing guarantees that the teams are building the right solutions from business and user perspectives.

The Develop Phase
Build | Deliver | Support

In the Develop phase, UI Designers create the visual designs which consist of different types of assets, from components to documentation, that will later support the development team. This phase's goal is to demonstrate how the solution will behave and look like when it goes

live, ensuring that the experience is consistent and aligned with the best practices identified in the Discover phase. Front-end developers will transform the visual designs into code, turning concepts developed in the Define phase into reality. A cross-browser and multi-

device compatible HTML, CSS, and JS structure is created and used as a baseline for the development team.

The success of this phase is strictly connected with the existence of a Design System that facilitates the communication and creation of components by UI designers, Front-end developers, and Back-end or full-stack developers.

Some of the main tasks include:

- **Analyse brand guidelines** and assets (fonts, colours, iconography, photography, logos, components and pages).
- **Analyse UI references** to set the Design mood and build the visual identity.
- **Prepare the UI foundation** that will kick-start the design system.
- **Design the living design system** using the atomic design approach.
- Build or reuse a **front-end framework**.
- **Support** the implementation team.
- **Document the Front-end framework** for hand-over.

By the end of this phase, a UI designer will have produced the visual layouts and the visual and interactive guides. The Front-end Developer will have made the HTML, CSS, and JS structure and created the assets to deliver to the development team.

Taking Customer Experience to New Heights

Celfocus Design Methodology has been used in a multitude of projects, covering different scenarios and use cases. It has proven to be adaptable, flexible and, most importantly, effective.

By bringing together different stakeholders – Business, IT, and End-users - and creating a single graphical code and language, it fosters collaboration, participation, and sharing. Multidisciplinary teams have different tools at their disposal to establish a common baseline, which allows for the design of a customer-centric experience. The main benefits arising from using this methodology include:

- Give projects a **design mood**, from conceptualisation to development.
- Contribute with deliverables that are **easy to "read" and easy to approve**.
- Use design techniques that **promote the participation of different stakeholders** (customers included), speeding up the approval process.
- **Focus on end-users** by being customer-centric.
- **Validate solutions in the early stages** of the project, so reducing rework costs.
- Present solutions that **contribute to the WOW factor** (beautiful and easy to use).
- **Democratise creativity** and bring innovation and disruption from different perspectives.
- **Do the right things right.**

Re-designing an Asset Management Solution in Collaboration with Clients

In industries driven by large data sets and complex reports, a mistake can represent a loss of millions of euros. Looking at the Financial Industry, particularly in the Asset Management business, platforms need to support large data volumes and information processing, while providing users with the required insights.
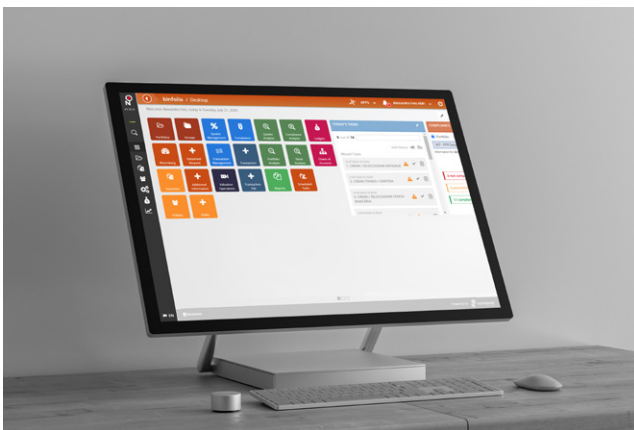
"The simplicity in parametrising limits and automatic Bloomberg data collection, as well as report creation and saving/sending, make Binfolio 3.0 a significant added value solution in day-to-day work."

Sílvia Antunes
Organisation and Project Management
at Crédito Agrícola Gest

The ideal UX for a portfolio manager is achieved when he can intuitively perform his regular tasks with minimal training. Asset Management® is a flexible portfolio solution for valuation, accounting, and reporting with automated data aggregation and simple, modern user experience for faster and more reliable back-office performance. It makes middle and back-office operations more efficient, reliable, and secure.

With more than 30 years of experience, the solution needed to update its version, making it more user friendly; therefore, a path was built in collaboration with the clients. The project gathered a group of users from several Financial Institutions using the asset management solution and a team of UX/UI designers and front-end developers. By doing quantitative and qualitative studies with this group, Celfocus was able to understand their experiences and insights so we could improve usability. To understand what could be improved, the team had to step into the users' shoes.

For starters, the team took a more in-depth approach to the asset management business, technology, and stakeholders. This understanding was crucial for the next phase: drawing up an accurate list of key users. During this process, the team acknowledged how the software works, which were the main performed tasks, and which were the common questions frequent users most had.

The research was documented with notes and photographs and resulted in:

- **4 profiles;**
- **A stakeholder map;**
- **The prioritisation** of the most relevant use cases and software features.

This was the foundation for further software developments.

Based on the research results, the Design team used card sorting to settle the menu priorities for each user's profile. This allowed the team to organise the software's functionalities according to the most performed tasks and their relevancy for each user.

Through interviews and card sorting, some conclusions became evident:

- **Most users don't know** all the asset management software features;
- **Tasks should be associated with portfolios and assets** to provide a better experience;
- **It is crucial to be able to export information** while performing a task;
- **Transactions and Portfolio valuation** are the main focus for the users;
- Some tasks should only be accessible to **specific users.**

The information taken was translated into ideas by the development and Design team that gave rise to different scenarios resulting in a final prototype that was later tested.

Lastly, it was time to make it real: all the conclusions and user outputs were translated into a brand-new design that provides users with a great experience.

Working together with end-users allowed Celfocus to improve in a way that makes everyday tasks more comfortable and more intuitive. For this, Celfocus relied on its experienced clients, their vision of the asset management business and the Design Methodology.
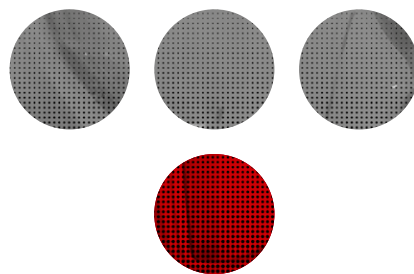
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About Celfocus

Celfocus is a fast growing, global high-tech company with a reputation for developing and implementing successful projects and solutions that drive business value.

By combining a deep business knowledge with the understanding of different technologies, while never losing sight of the customer experience, Celfocus built a reputation leveraged on an unexcelled track record.

Serving Clients in 25+ countries, Celfocus helps organisations transform their business in order to improve competitive positioning and ultimately their performance.

For more information about CELFOCUS, please visit our website
www.celfocus.com

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