# Modern Outbound UI
How we made it.

LeadDesk

Introduction

The Outbound UI (user interface) in LeadDesk is used by thousands of agents online, every day. Each agent handles up to 150 contacts.
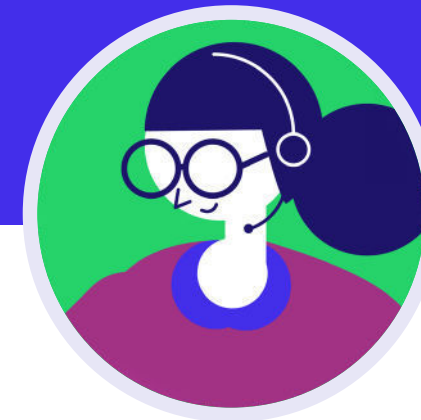
LeadDesk helps triple the efficiency of call center agents for our customers. But what if we introduced a new UI, which could help agents improve even further?

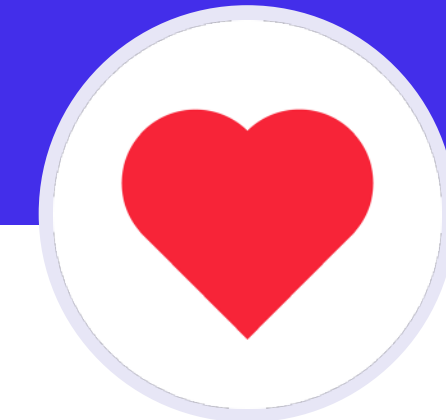We developed the Modern Outbound UI over these stages:
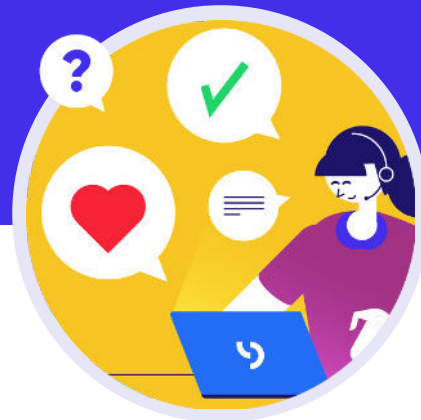
ETHNOGRAPHIC RESEARCH

Agent interviews and observations

INTERNAL INTERVIEWS AND REMOTE RESEARCH

Team research and customer surveys

USABILITY ANALYSIS

Prototyping and usability testing

About the author

Luu Thuy Minh is an experienced UX designer who has worked on user experience and user interface design. She previously worked at Fujitsu and Smarp before joining LeadDesk.

Minh leads projects at LeadDesk to analyse and improve the software, helping agents and admins get more out of their contact center.

Evaluating old Outbound UI

Shadowing is a qualitative research technique where a researcher follows and observes a user closely in their own environment. We shadowed LeadDesk customers at work to see how they used the old Outbound UI.

Objectives

· Learn how the agents use LeadDesk in their daily work.

· Discover edge cases or unique approaches.

· Evaluate the current product pain points or issues.

· Measure customer satisfaction using the System Usability Scale.

Each session lasted from 2 to 4 hours, depending on the participant. I started a session by interviewing the agent to know their background and how familiar they were with LeadDesk. Afterwards, I spent 1 to 3 hours observing how the agents normally worked, followed by a post session interview where I clarified any questions that arose during the observation period.

In addition to shadowing agents at client companies, I wanted to learn how our support team use LeadDesk. I often worked in the Support office to observe their usage and to get an understanding of what kind of support issues they received.

✓ What is the System Usability Scale?

First created by John Brooke in 1986, the System Usability Scale (SUS) is a reliable industry-standard tool to gauge software usability.

It is made up of a 10-question questionnaire with 5 possible responses from the interviewee on each question.

SUS results are analysed on a percentile ranking, meaning that the most common pain points can be identified rapidly.

Results

Shadowing and interviewing agents using the old Outbound UI proved informative as we were able to recognise a number of improvements that could be made to help agents work more efficiently.

According to the agents, the current UI is very straightforward and easy to use once they've learned it. The agents could make calls and find what they needed easily.

However, agents also found a number of issues with the old configuration. Navigation was a particular point to focus on, where agents would have to find a particular feature behind tabs, instead of having it available immediately on the screen.

Also, since agents commonly use their LeadDesk solution with other programs, a responsive-first layout would be preferred.

Raising UX awareness among LeadDesk colleagues

My colleagues who accompanied me to my shadowing sessions shared that they found it very insightful to see how users use the software in real life. They were surprised to see how some environments were setup and how differently agents' workflows can vary.

By visting their office, we also showed the clients that we, the Product team, care about their experience and value their feedback.

I regularly scheduled company presentations to share my research findings with the whole LeadDesk team. This increases everyone's awareness of our development process and provides clear explanations of how and why we build the software in certain direction.

Moment that stuck with me

One of my most memorable moments was with an excited and helpful young part-time agent. When one call ended quite abruptly with an upset contact, for a brief moment, I could hear the shock and disappointment in his voice.

From that moment, **I wanted make sure that the new Outbound UI would be easy to use and help make the agents daily workflow more seamless, if not bring a little joy.**

Internal interviews

Before starting to work on the design, I set up meetings with colleagues from different departments and countries to learn about the software from their perspectives.

From LeadDesk account managers, I learned about the pain points and wishes they received from the clients. I discovered that clients in different countries have very different expectations and setups. While many clients were not familiar with user research and usability testing, they wanted to give feedback. I needed to be careful when choosing the research methods so not to make it difficult for clients to participate.

It was great being able to communicate directly with the clients since I was able to understand why they wanted certain changes and what problems they were trying to solve.

After many internal discussions and planning with clients and our RnD team, we prepared a plan to move forward: We would gradually modify the UI starting from the most used elements (the call dialog), and elements providing best value for investment.

The aim is to use Omni solutions as much as possible to maintain consistency and ease of learning. For some parts, the merging means total overhaul, but for some, it could be a small UI refresh using the current solution.

We also agreed to periodically evaluate whether the chosen approach was still valid.

A special team was formed to take charge of the Outbound UI renewal project.

Remote research

I started to create drafts of the Modern Outbound UI. To test my design ideas, I used Typeform at first to send surveys to collect feedback. Later, I switched to Maze, which is more suitable for rapid testing. I continued to have interview meetings with the admins and volunteer survey participants.

While I was testing the design concepts, the rest of the team investigated how to update the codebase. After a few rounds of testing, we started to implement the new design.

Testing with new users

We applied the new UI on the call dialog and renewed the navigation and other main pages. Based on our research, we believe that an improved navigation system and new styling will improve the user experience.

Usability tests with new colleagues

After Loxysoft merged with LeadDesk at the start of 2021, we had an influx of new colleagues. This was a good opportunity to test the Modern Outbound UI with people who have experience with other contact center software. I conducted a few remote usability testing sessions with our new colleagues. I also recruited observers to join in the sessions to take notes.

Results

We successfully ran 5 usability sessions. The observers, our colleagues from various departments, expressed that they found it very insightful to participate in these sessions and they were happy to contribute to the development process.

Thanks to the usability tests, we confirmed the strongest hypotheses of the new design, and found opportunities to improve the new navigation system.

Based on these test results, I implemented further improvements to add clarity and improve usability.

Usability tests with the support team

After implementing the new navigation system, I arranged another round of usability tests with our support team. I recruited 2 senior supports who have been using the Outbound UI for a few years and 3 junior supports who have only used the software for a month. The participants have not taken part in prior sessions, so this was their first time using the Modern Outbound UI.

Despite the different seniority level, they were all excited about the changes. I further improved the user experience and user interface based on results from these tests.

Test objectives

- Can users find their assigned projects?

- How does the new navigation system work?

- Can users use the new call dialog layout effectively?

Main improvements

New navigation system

Conveniently switch views like outbound, history, order, away, settings, etc.

Campaign view UX

Change campaigns more easily and quickly search for your specific campaign in the dropdown.

Calling modes

Renamed for greater clarity.

Greater control over Inbound and Robot call preferences

Inbound calls are now not turned on by default when you navigate to the Inbound tab.

In brief

My team and I conducted extensive user research across admins and agents in different countries to improve the Outbound UI for greater efficiency and flexibility at work.

We identified opportunities to improve the Outbound UI for agents, helping them complete their work more efficiently, and hopefully bring more joy from using LeadDesk.

The Modern Outbound UI is now available for LeadDesk customers, so you can take advantage of this improved design and work more efficiently.

We will continue to monitor, iterate and make improvements as we learn more from the Outbound UI usage.

Want to try the Modern Outbound UI?

Take advantage of improved workflows and usability in the
Modern Outbound UI for sales agents.

To activate it in your company's LeadDesk account, contact your
Account Manager or send an email to **support@leaddesk.com**

LeadDesk