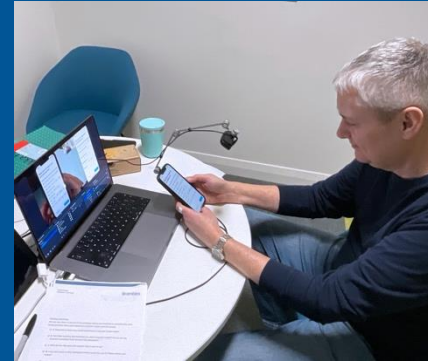


Brambles

Using research & data to drive design



The scoping squad

What is Scoping? Why do we do it? How we do it?

01. What?

Scoping transforms ideas and problems into actionable, problem-solving projects

02. Why?

Scoping shows the path to value, clarifying why initiatives should be realized.

03. How?

Scoping's output guides solution implementation and value realization.



Research roadmap

The 'What?' & 'Why?'

...in the Copilot research roadmap

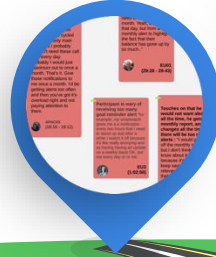
What?

The business told us many of our colleagues are overwhelmed by issues and tasks, struggling to prioritize daily.



Why?

We carried out 40 User Interviews and gathered 150 survey responses to validate problem statements and uncover new pain points.



The 'How?'

...in the Copilot research roadmap



4. PoC feedback

Within Salesforce which was tested globally to further learn tool appetite & assess usability.

Reiteration

2. Prototype feedback

We built a solution prototype tested by 15 potential users globally to learn tool appetite and user needs.

3. Workshops & survey

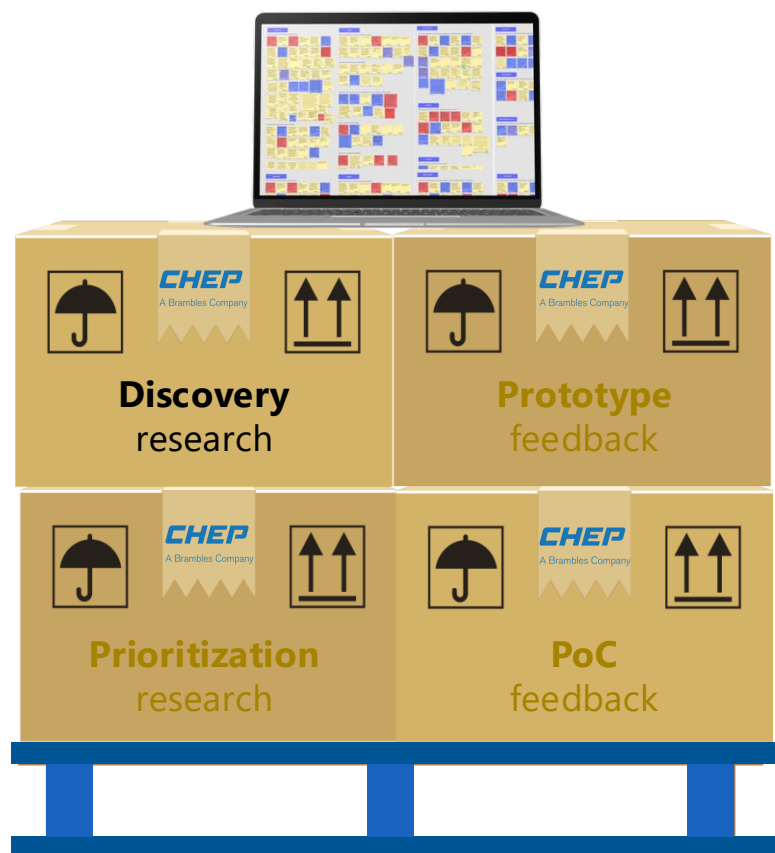
Workshop with 13 global colleagues and gathered 110 survey responses to help define how we prioritize insights.

1. Service led thinking

We conducted an evaluation of current state process flows of alert/ issues which helped us create service blueprints for a possible solution.

Unpacking our findings

Discovery research



190 participants

150 survey responses
40 user interviews

Key takeaways

Full report: [click here](#)

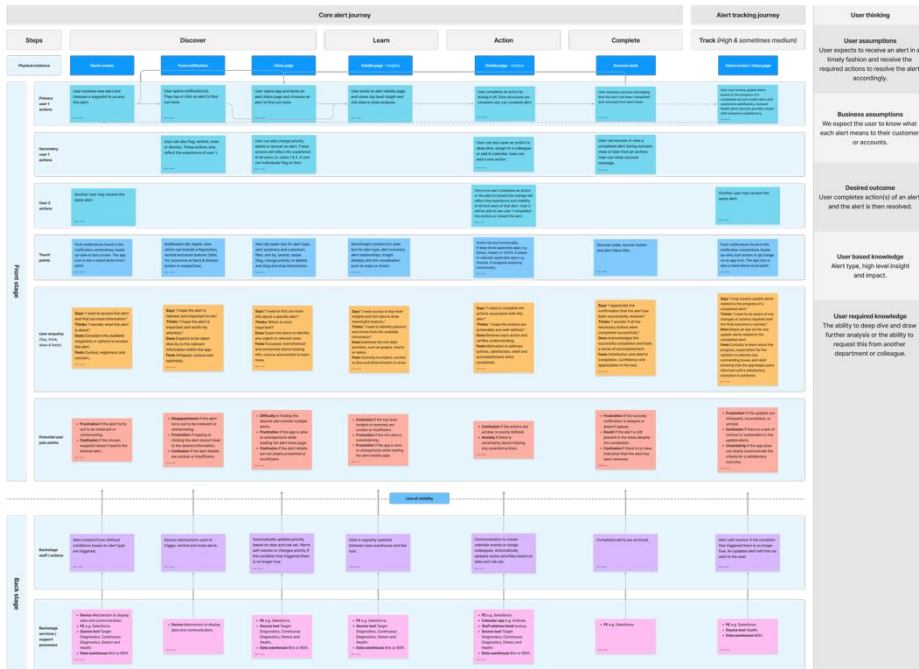
- 1. Diverse Set of Users:** Over half the participants oversee more than 50 customers, with some managing 100+ across multiple locations, sometimes over 500. These varying customer management scenarios highlight the need for customized account management solutions.
- 2. Challenges in Prioritization:** A significant number of users struggle with prioritizing actions based on insights received. This difficulty impacts their ability to efficiently manage workload and customer relations.
- 3. New Pain Points:** Newly identified issues include ineffective internal communication and the overwhelming number of insights available, which complicates decision-making processes.
- 4. Strong Appetite for Digital Solutions:** There is a clear user preference for proactive, app-based tools that integrate with existing workflows and data tools, enhancing work efficiency and allowing for better prioritization and insight utilization.

I would become more proactive by actioning prioritised alerts rather than being reactive to a mountain of emails.



Fabian Miebach
Australia

Service led thinking



Zoom level 0 – High level future view of an alert lifecycle

Key takeaways

More details: [click here](#)

1. Current state process: Our design analysts spoke to teams at BRIX, Detect and Health to create process flow maps to help us understand how tickets and/or alerts integrate within Salesforce and beyond.

2. Alert types: A review of BRIX and BDH data warehouses and tools like Detect and Health identified 31 potential alert types, best grouped into two categories: Account Health and Account Movements. This simplification aids in clarity and user understanding.

3. Information overload: From reviewing our discussion research the main primary user concern was information overload in our user's daily workflow.

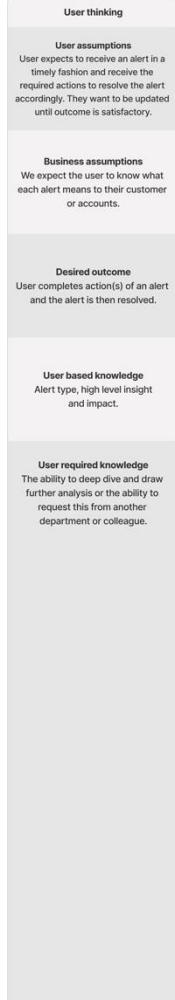
4. Time sensitivity: It was also understood from listening to our user's time sensitivity played an important role in issue and task prioritisation.

6. Service blueprinting: We then produced service blueprints for time-sensitive and non-time sensitive alerts lifecycles.

These brought together various perspectives (front and back stages) in a visualisation of what will need to be in place for a future service vision of the Copilot to be realised.

User persona(s): Variety of customer facing

Could effect all users who have some form of customer facing or relationship such as account managers, FSE's and customer service.





15 participants

12 remote users
3 users on site usability lab

Prototype feedback

Key takeaways

Full report: [click here](#)

Based on a review of our blueprint, we drew a user journey map to illustrate a high-level view of a user journey solution. We then turned this into an interactive prototype that we could demo with end users.

1. Current State Comparisons : Users generally found the current process of discovering insights and taking action to be lengthy and laborious. The Copilot is seen as a quick and easy solution to resolve this.

2. Would You Use the Copilot & Does It Help in Prioritizing? : A majority (93%) indicated that they would use the tool, citing its ability to increase visibility, ease of adoption, proactivity, clearer priorities, and more efficient use of time.

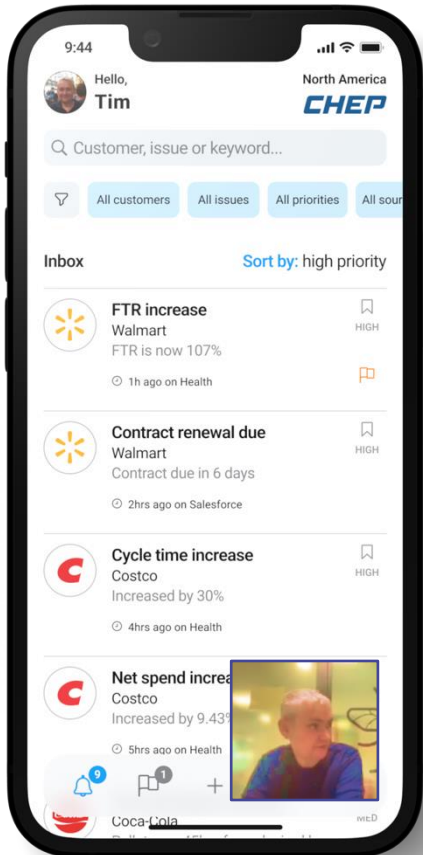
3. Enjoyment and Usage: Users expressed delight in the tool's immediate sorting of alerts by priority, providing quick focus points. The summarised insight, coupled with rich visual data, was highly appreciated.

4. Pain Points and Frustrations: Concerns included the frequency, quantity, and relevance of alerts, integration difficulties with existing tools, and the need for full customization.

If my notifications were being cluttered with stuff that didn't matter to me, specifically, then that would make it so I use it less.



Steve Grudzinski
USA





123 participants

110 survey responses
13 colleagues in 3 workshops

Prioritization research



Prioritization
research

Key takeaways

Full report(s): [click here](#)

- 1. Time Sensitivity and Impact of Delay:** Both survey results and workshops emphasize these factors along with Financial Risk as primary for alert prioritization, confirming their broad relevance across users.
- 2. Priority level and importance:** The research helped us discover an average priority level (high, medium and low) and importance score (using a weighted points system) for each alert type.
- 3. Effort Vs reward and net spend:** We also asked participants to complete a prioritisation task.
- 4. Audience participation:** The average priority level, importance and effort vs reward assigned to each alert had been provided by each of the 123 participants whilst considering time sensitivity and any impact of the delay.
- 5. Prioritization Strategy:** We used the above data alongside customer net spend (financial risk criteria) to build a phase 1 algorithm to order alerts accordingly.
- 6. Regional and role differences:** For future adaptability of the algorithm we recommend tailoring alert thresholds and algorithm criteria to suit the specific needs and operational contexts of each region, role and primary customer category.

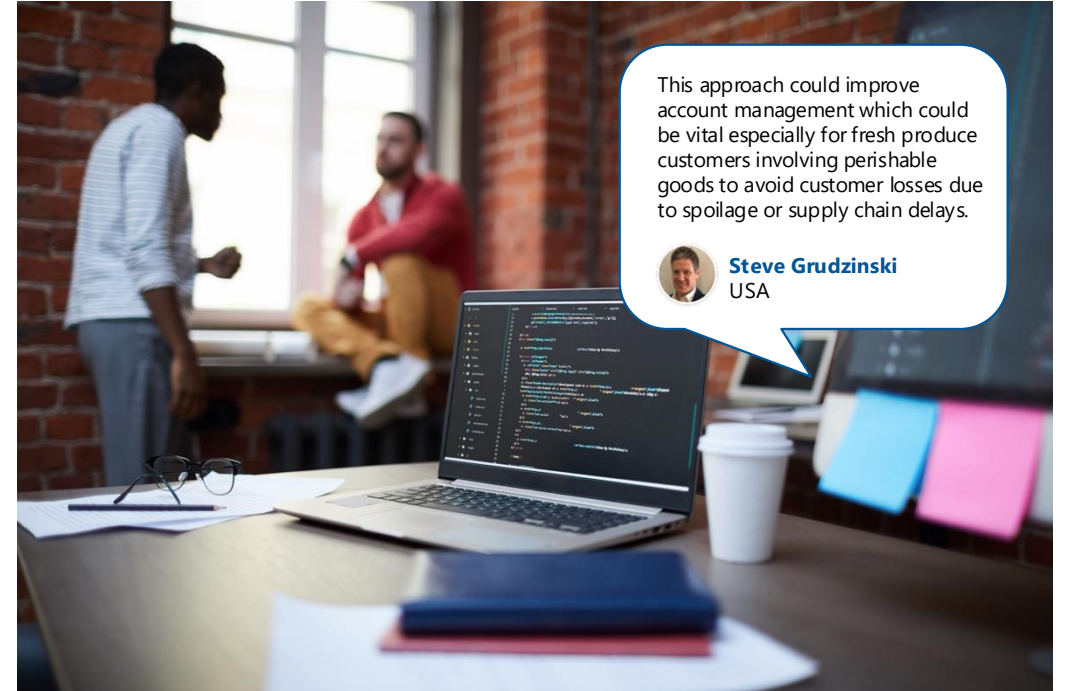
Using data to drive design

User-Centric Alert Prioritization algorithm

We used the data discovered from the survey results (110 responses) and workshop discussions to build a phase 1 algorithm to order alerts accordingly using the following criteria levels.

Recommended prioritisation flow

- Step 1:** Sort alerts by 'Priority Level'.
- Step 2:** Within each Priority Level, order alerts by 'Importance Score'.
- Step 3:** Use 'Effort Vs Reward Category' as a secondary sorting criterion.
- Step 4:** Finally, consider the Customer Net Spend within each category.



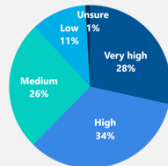
In practice example

High declaration delay

This alert refers to a delay in customers declaring assets.

Step 1: The majority of responses cluster at the higher end of the priority spectrum, with 'High' and 'Very High' collectively accounting for 68 out of 109 responses.

Recommended Priority: High Priority.



Step 2: We then used a prioritisation ladder based on the given weights and observed frequencies.

Importance score: 303 points.

Weighting	For example, 'High Declaration Delay'
Very high 4 points	Very high 31 responses x 4 points = 124
High 3 points	High 37 responses x 3 points = 111
Medium 2 points	Medium 28 responses x 2 points = 56
Low 1 point	Low 12 responses x 1 point = 12
Unsure 0 points	Unsure 1 response x 0 points = 0
	Total: 303 points

Step 3: We then asked participants to choose an appropriate category from:

- Big Bets:** High effort, high reward
- Easy Wins:** Low effort, high reward
- Incremental:** Low effort, low reward
- High-Cost Tasks:** High effort, low reward

Most common category: Easy Win.

Prompt asset declarations will improve inventory accuracy and customer billing, requiring minimal effort for significant operational gains.

Step 4: We then used the customer's net spend which helped us understand financial risk to which then finally organised alerts in priority.

Being proactive through the data could stop surprise later.

Danielle Schembri Australia

A laptop is shown at an angle, displaying a web application. The application features a map in the center, surrounded by various data points and lists. On the right side of the screen, there is a video call overlay showing two participants. The background of the slide is a solid blue color.

PoC (Proof of Concept) feedback

The concept

Collate

The Copilot will be a unified platform where all relevant digital insights and actions are consolidated for easy access.

Prioritise

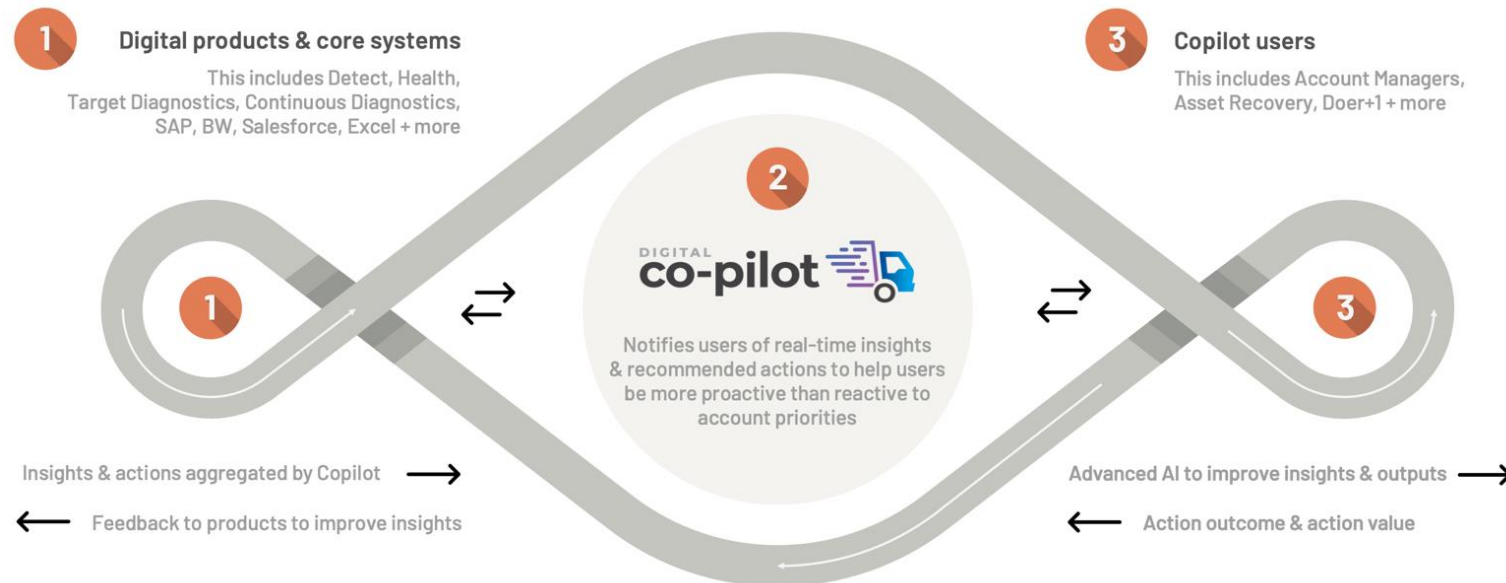
The Copilot will prioritise alerts based on the potential value they could generate, ensuring users always know the most valuable task to focus on.

Integrate

The Copilot will seamlessly integrate the insights and related recommended actions into existing workflows, providing users with relevant information when they need it.

Capture

The Copilot will implement a measurement mechanism to assess the value of actions taken, enabling product improvement, and building trust in the tool's effectiveness.





The designs

Version 1 - Stand-alone app

We further developed the Figma prototype into both iOS and Android applications.

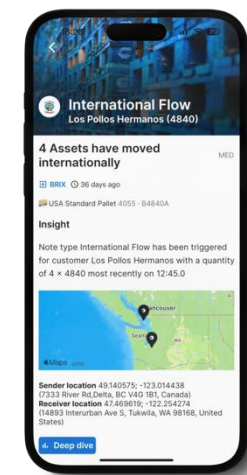
Version 2 – Salesforce LWC (Lightning Web Component)

We used the 'look and feel' from the stand-alone app and the Figma web prototype we created and built the user interface within Salesforce. Both web and Salesforce mobile app versions were demoed.

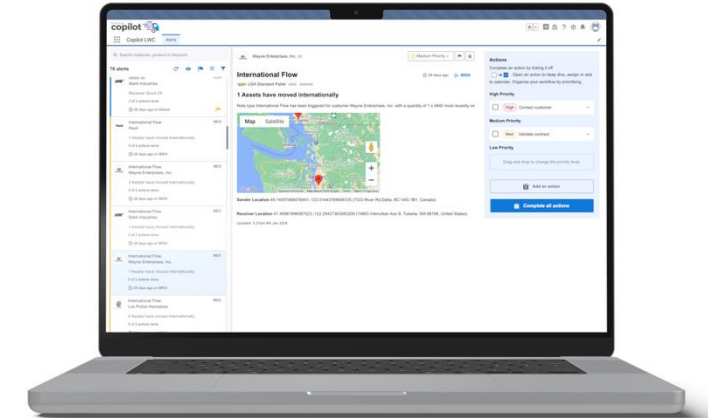
Version 3 – Salesforce standard

We also chose to demo the standard Salesforce user interface that our users may be familiar with. This had the same content as the others, but no filters (not available) however included some of the Salesforce standard collaboration features. Both web and Salesforce mobile app versions were demoed.

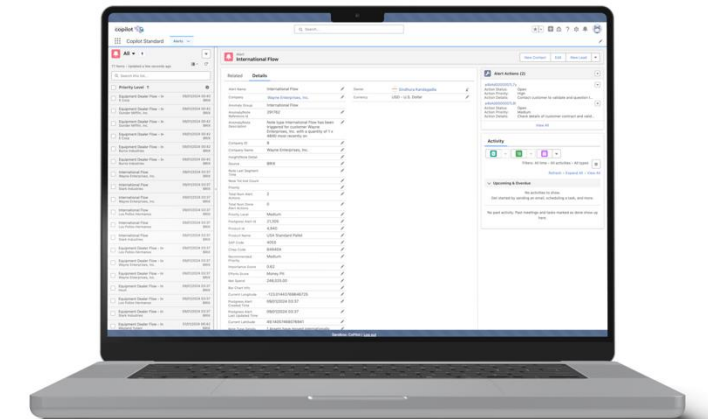
V1



V2



V3





PoC objectives

1. Sample Data Validation

Validate the end-to-end data flow from source systems to PoC user interface.

2. Alert and Data Insightfulness

Ensure that the combined and prioritized alerts from different platforms (BRIX and BDH) provide valuable insights and organized accordingly to the users.

3. Architecture Suitability

Assess whether the proposed architecture can support an intuitive and efficient user experience for both the PoC and the long-term solution.

4. Alert Prioritization

Understand the prioritization of alerts from different platforms and their importance to the end-users.

5. Tool Utilization and Salesforce importance

Investigate how users interact with various tools throughout their workday to optimize the Copilot tool's fit into their daily workflow.

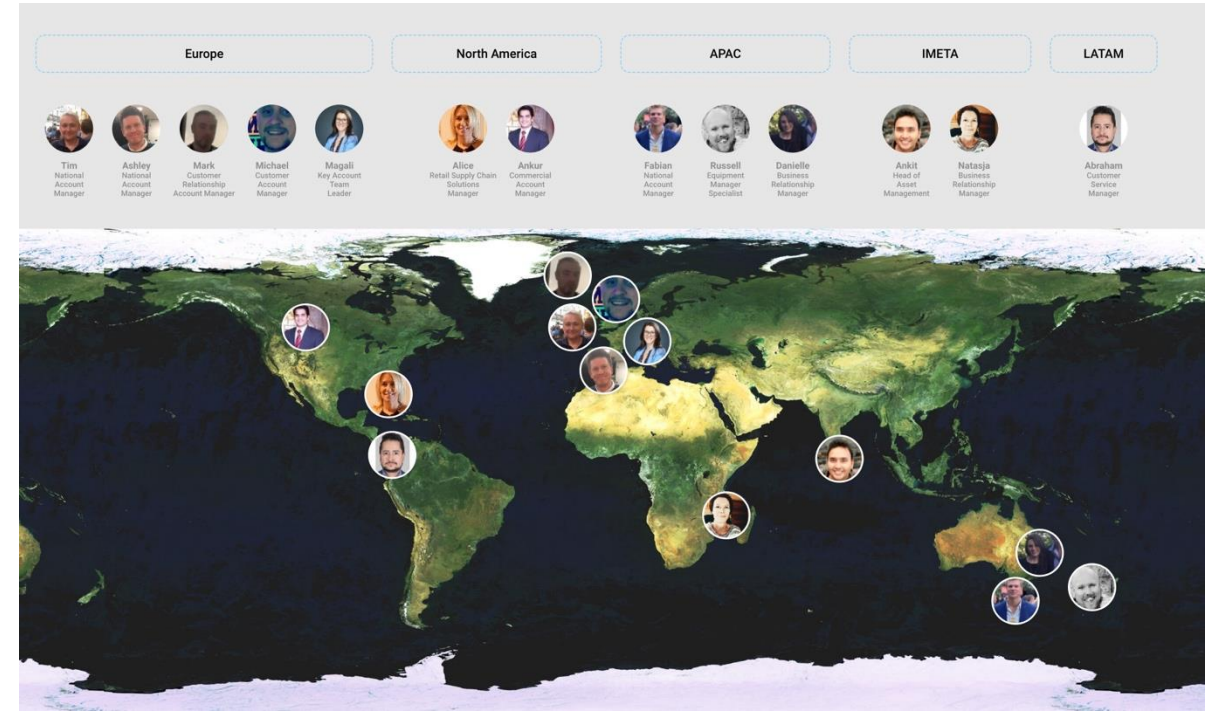
6. Understand appetite and validate pain points

- Learn tool appetite & user preferences
- Identify any pain points and frustrations
- Evaluate observations to determine feature importance
- Generate new ideas from user feedback.

Research audience

We were delighted to interact with 13 users globally.

This group comprised both familiar users we've previously engaged with and new participants, ensuring a well-rounded perspective.



What we asked

Appetite & needs

We kicked off the research by delving into user preferences and concerns



Finding alerts

We were eager to assess user satisfaction & identify pain when in discovery



Discovering insights

We wanted to learn how users reacted to our insight & recommendations



Salesforce integration

We wanted to explore the importance of Salesforce



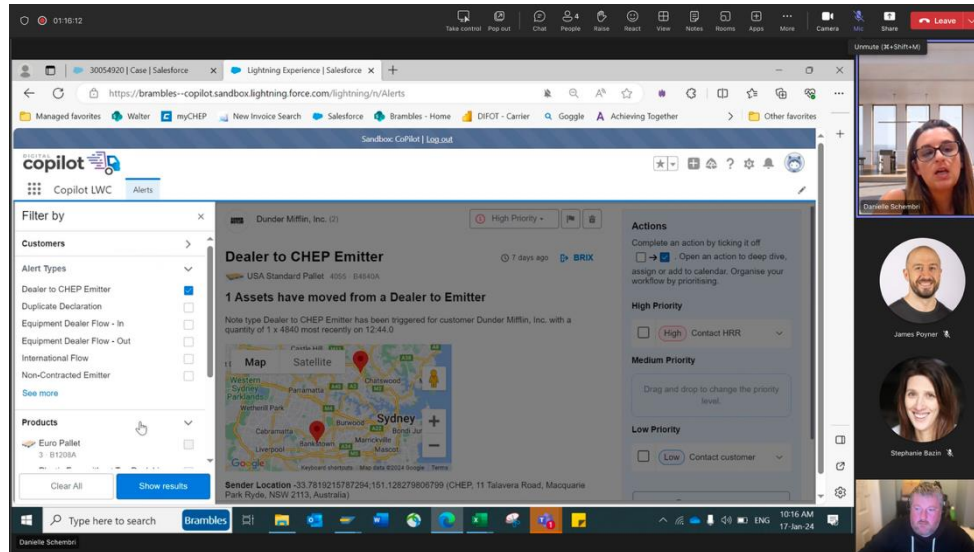
Tool usage

We wanted to anticipate how and when users would use Copilot

Research approach

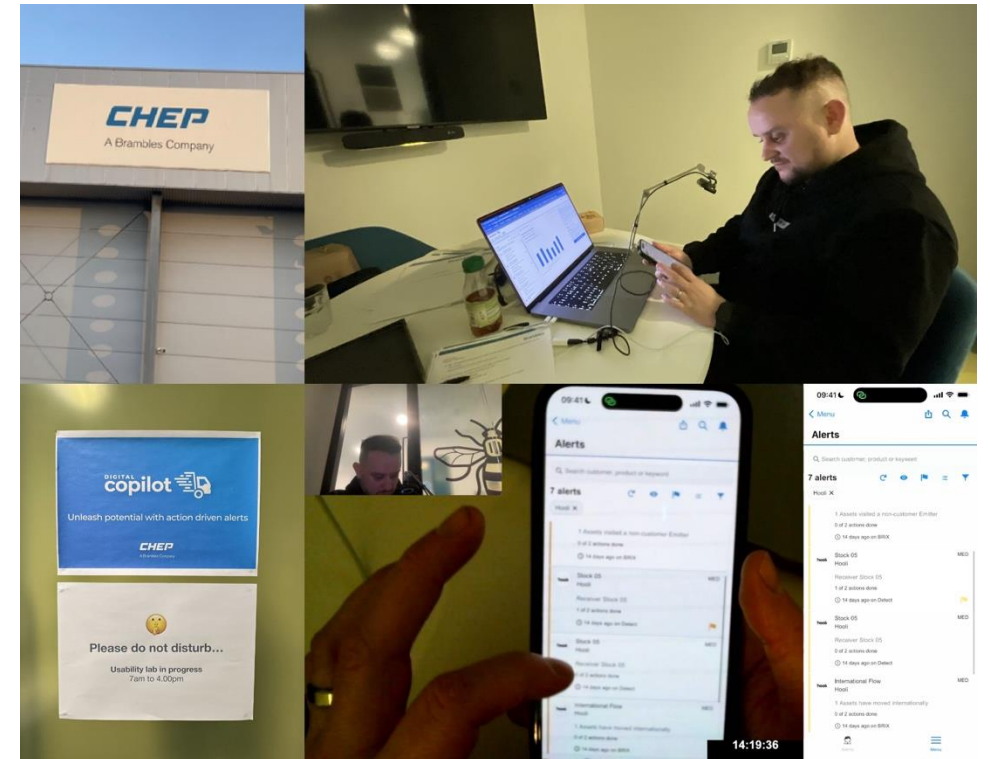
Remote demos

For users outside the UK, we asked to join via Teams, where everyone got to interact with the demo.



Face-to-face usability lab

We enthusiastically conducted face-to-face labs in the Manchester CHEP office with a select group of users, in which we streamed to key stakeholders and our UX Chapter, the first of its kind for Brambles Digital!



Usability lab

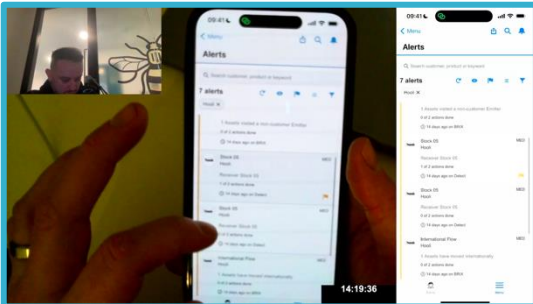
1. Usability lab

2. Observation room

3. LIVE stream

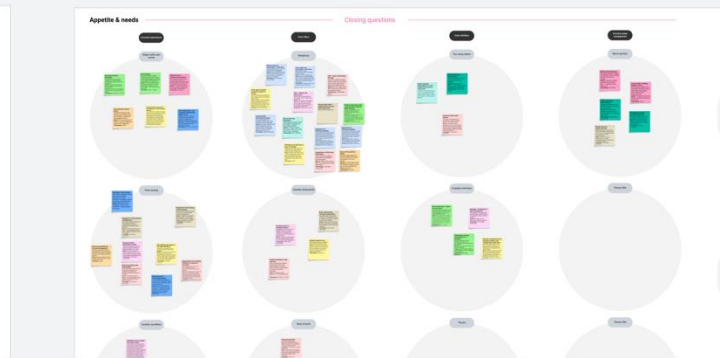
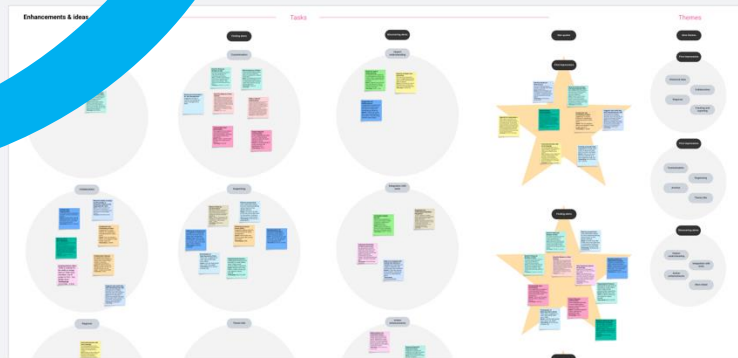
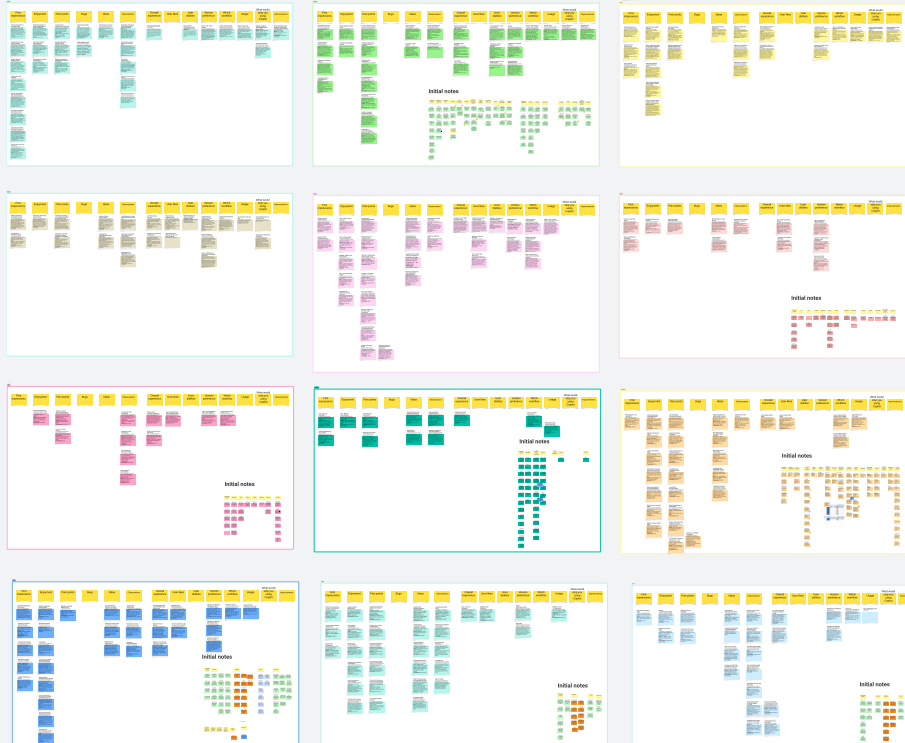
UX research team gather evidence

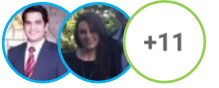
User navigates tool during interview



Building the evidence

We compiled key observations, enjoyment areas, pain points and enhancements and discovered common themes to understand our end users.





13 participants

9 remote users and 4 users on site usability lab

Executive summary

Appetite and needs

- PoC participants were excited about Copilot's potential to enhance proactivity, save time, and increase productivity.
- Users worldwide lauded Copilot for boosting efficiency:



Mark (Europe) Praised its role in addressing issues promptly and efficiently.



Russell (APAC) Highlighted its time-saving capabilities.



Ankur (North America) Enthusiastic about using Copilot's data for risk management and customer engagement.

5 key takeaways

Full insight report: [click here](#)

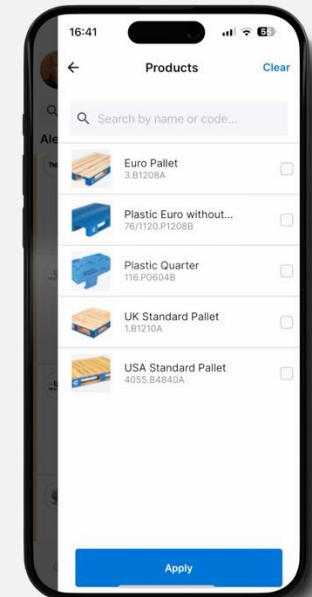
1. Customization and Alert Management: Users desire control over the volume and relevance of alerts, highlighting the need for a balance in alert frequency and content. The need for personalised alert settings and during both onboarding and usage is crucial.

2. Integration with Existing Systems: Users appreciate Copilot's integration with Salesforce, as it facilitates streamlined workflows.

3. Data Accessibility and Actionability: Users value the actionable data provided by Copilot, particularly for customer engagement and issue resolution.

4. Regional Application Variability: Insights from different regions underscore the need to consider regional differences in Copilot's implementation.

5. Inbox Congestion and Cannibalisation: Current alert descriptions risk becoming ignored, leading to inbox congestion and potential disuse of Copilot. The possibility of duplication of alerts in multiple systems needs addressing.



User feedback

- Users generally had a positive experience with Copilot, appreciating its **intuitive interface** and the **visual appeal** of the LWC version along with a **compact view of alerts**.
- Its **integration with Salesforce** and **clear alert prioritization** were well-received, aligning with user needs and seen as a time-saving solution.
- However, challenges arose in **managing a large volume of alerts** and their **manual closure and completion**.
- Feedback suggests enhancements like improved alert **customization, impact detail** along with more **improved actions** and **Salesforce features** for collaboration.

Watch the short showreel (next page) video showing common themes.

Everything is in a snapshot and it will be like a Birds Eye view.



Ankit Shukla
India

I find it really interesting that it's in the same system (Salesforce) as we already use and so we have a lot of data here already.



Magali Van De Wildebergh
Benelux

I would struggle to work through 89 alerts... that would just not happen, to be quite frank.



Fabian Miebach
Australia

I won't mind (89 alerts) as it will just tell me that there are 89 things I need to attend too.



Natasja Tinker
South Africa

Version(s)

LWC Salesforce & stand-alone

Workflow preferences

Which setup did users prefer?

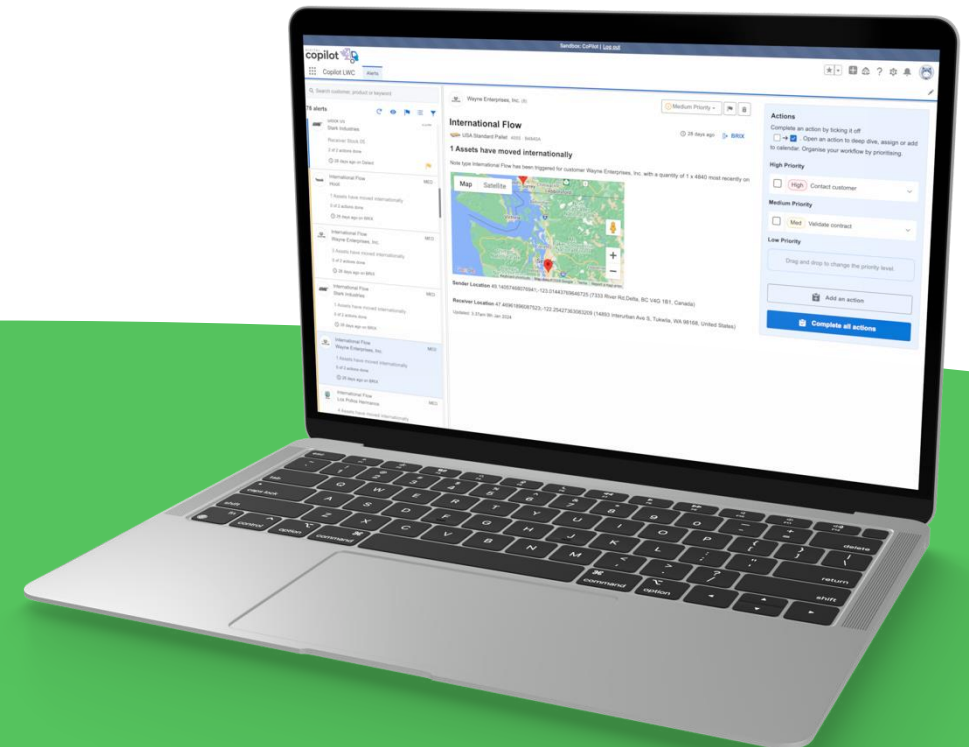
- Users showed a **strong preference for laptop-based** Copilot usage, influenced by their need for in-depth data analysis and alignment with their daily work practices of thorough data analysis.
- While the **mobile version serves well in the field**, most users favour laptop use, fitting those who require detailed, regular interaction with Copilot.
- **The PoC's responsive design within Salesforce** allows for mobile use in the field, accommodating diverse user needs.

Current state comparisons

- Users unanimously agreed that current tools make discovering insights and taking action time-consuming and labour-intensive.
- Often, users need support from other teams and departments.
- Copilot is seen as a solution to quickly and easily resolve these issues.

Anticipated frequency of use

- **62% of users preferred daily Copilot use**, integrating it into their professional routines for efficient engagement.
- About **15% planned 2-3 daily checks**, aligning with office workflows.
- In contrast, **field workers like Danielle and Alice chose weekly use**, fitting their mobile schedules, while Magali preferred **bi-weekly to monthly checks, suitable for her strategic role**.



Enjoyment and frustrations

Pleasure points

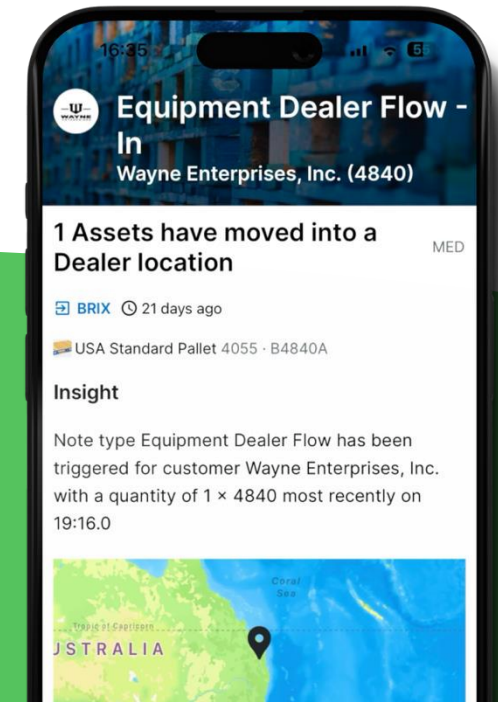
- Participants have a positive view of the Copilot PoC, noting its **potential to simplify data analysis and task prioritisation**.
- They **appreciate its integration into Salesforce** and daily workflows, offering simplicity and direct access to relevant data.
- Participants value Copilot's **ability to proactively alert them to important issues**, enabling prompt and efficient action, enhancing satisfaction and reliability.

Pain points

- Users indicated that the **frequency, quantity and relevance of alerts needed to be managed** in-order-to prevent discouraging use.
- Participants suggested **clearer definitions and explanations** in the tool for better understanding of alerts and data.
- Instances of **uncertainty about certain features, like completing alerts**, were noted.
- Some participants emphasized integrating Copilot with existing workflows, **like setting reminders or calendar entries**.

Barriers to Copilot adoption

- A major deterrent to Copilot adoption could be the **volume of alerts and their relevance**. Users felt overwhelmed by too many alerts, hindering their ability to prioritize the most important ones.
- The issue intensifies when alerts aren't relevant or tailored to individual needs. **Copilot's success depends on delivering meaningful insights, not just a flood of generic notifications.**



Observations and ideas

Considerations

- It's important to **consider regional differences**, such as varying business models and regulations.
- A need for **customizable alert settings** to suit individual preferences was identified.
- **Proactive alert management**, reducing overload, and adding automated features are key for efficiency.
- These factors are vital to enhance Copilot's appeal and effectiveness for diverse user groups

Enhancements

- Customization is key for Copilot's success, as **users have diverse needs and preferences**. Participants desired customizable alerts for control over what and when they receive notifications.
- They stressed the **need for clarity on the impact and context of alerts**, suggesting the addition of explanations.
- A proposed **action-based workflow integration** would allow specific actions to automatically initiate related tasks, boosting efficiency.
- Participants recommended **integrating Salesforce functionalities** to enable direct logging of calls or task creation from Copilot.

Different countries use different business models... Would it be country-specific or will it be like a global vocab?



Natasja Tinker
South Africa

Just the high priority ones need to be visible.



Tim Pickles
UK

I need to see the history because if I get another one of these from the same locations, I need to see how many I've had from that location to be able to put a case together for the customer.



Michael Higham
UK

I always focus on like here's why it's important and why you should care about this alert.



Russell McCormick
New Zealand

Maybe if you're the manager and you see this is a high priority alert, you can assign a task to your people?



Abraham Núñez
Mexico

Version preferences

Salesforce LWC Vs Salesforce Standard

- Users unanimously favour (85%) the visual design and intuitiveness of the LWC (Lightning Web Component) version over the Standard, which they found cluttered and overwhelming.
- However, they value the advanced functionalities present in the Salesforce Standard version, which align with their existing workflow in Salesforce.
- Overall, while users favour the usability and design of the LWC version, they agree that incorporating Salesforce's existing management and tracking functionalities would enhance productivity.

Stand-alone app

- Advise **against developing the stand-alone app** despite user-friendly interface. This is because of the lack of Salesforce integration and extra download process misaligns with user preferences for laptop use and maintenance constraints.
- Many colleagues lack a company phone and are hesitant to use personal devices for work apps.
- Users favoured the stand-alone app's experience but the LWC version's combination of aesthetics and Salesforce features offers better functionality for daily use.

Salesforce LWC

Stand-alone app

Salesforce Standard

Using research to drive design

Customization

Key user pain point

The most prominent user pain point arose in managing a large volume of alerts, as majority of users were overwhelmed and discouraged by this.

Users desire control over the volume and relevance of alerts, highlighting the need for a balance in alert frequency and content. The need for personalised alert settings and during both onboarding and usage is crucial.

If my notifications were being cluttered with stuff that didn't matter to me, specifically, then that would make it so I use it less.

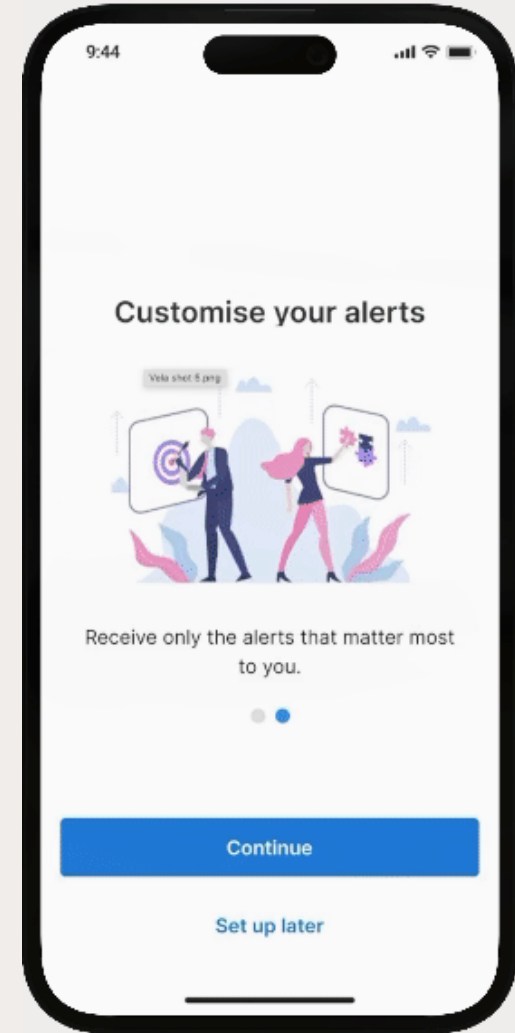


Steve Grudzinski
USA

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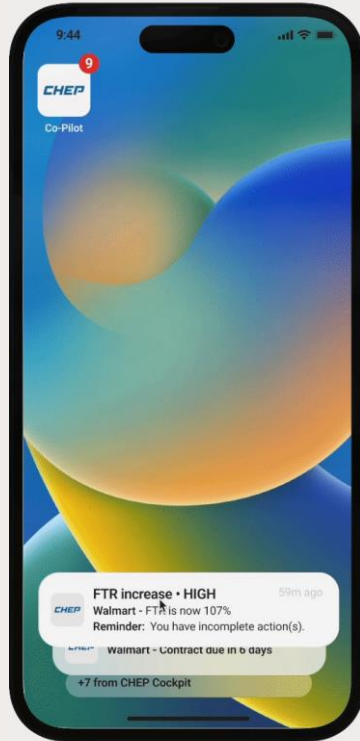
Fabian Miebach
Australia



Future ideas driven by user needs

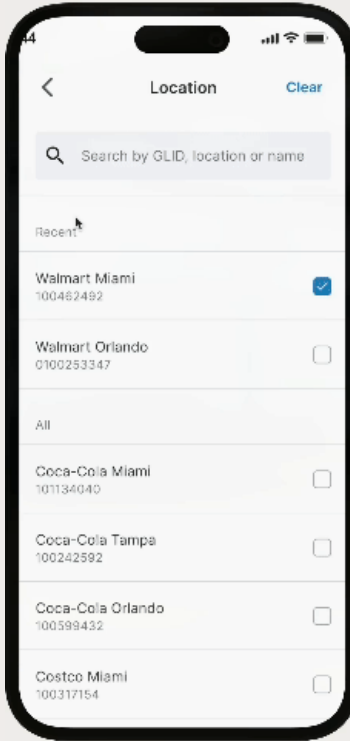
Push notifications

Receive alerts instantly through direct push



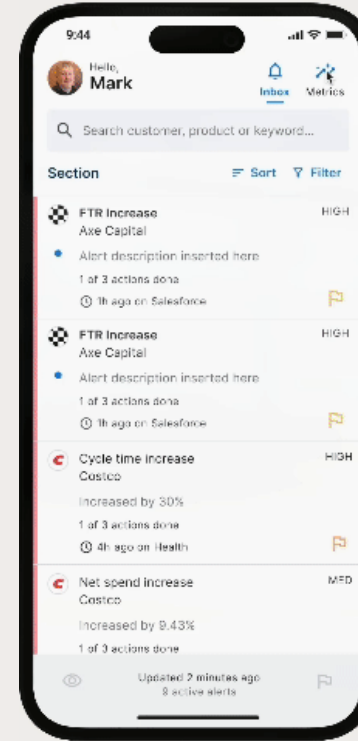
More filters

Filter by location, volume, business function and more



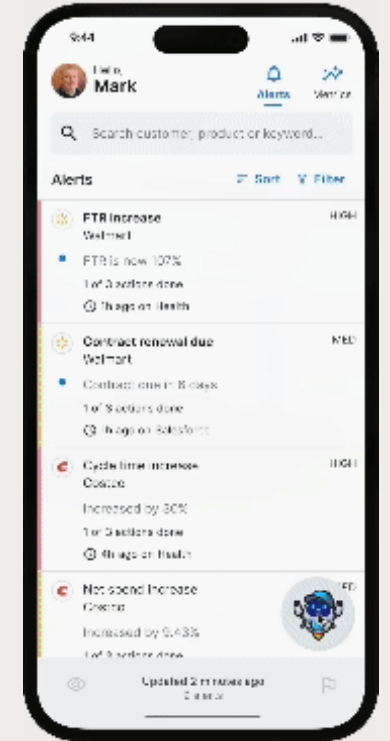
Metrics & Create Alert

Compact view of account health at each tier integrated with Health tool



AI Chat

AI voice search bringing account health and movements to you quicker



A laptop is shown from a three-quarter perspective, displaying a web application. The application has a dark theme and features a central map with a red location pin. To the left of the map is a sidebar with a list of items. To the right is a panel with various settings and a 'Generate' button. In the top right corner of the application window, there is a video call overlay showing two participants. The background of the slide is a solid blue color.

Thank You