

UIUXD 1.A-CS-047 Automation Interface

- Customer Success Tools

 Creator **Eunice Quezon**  Created **Apr 15, 2025, 22:05**  Last updated **Apr 28, 2025, 20:09**

UI/UX Design Specification

Document Overview

This UI/UX Design Specification outlines the key interface components, workflows, and user experience expectations for the Customer Success migration to HubSpot.

The document is intended to support design, development, and QA teams during implementation of user-facing workflows, dashboards, and interaction models.

Objectives

- Streamline the Customer Success Manager (CSM) and Admin experience
- Visualize business status, scheduling, and outreach workflows
- Centralize task views and reduce manual touchpoints across platforms
- Support accessibility and responsive design standards

Key Interfaces

Interface	Purpose	Notes	Status
Rep Dashboard (Kanban View)	Displays real-time customer queues sorted by status	Columns: Ready to Call, Scheduled, Approved - Not Scheduled	Mockups Done
Calendar Booking Form	Launched from Email #3 or dashboard to book calls	Pre-fills business data, time zone, aware, mobile-friendly	Mockups Done
Call Log Panel	Interface for Benefits Rep to log call attempts and outcomes	Supports disposition tagging, optional AI summary	Mockups Done
Email Configuration and Fallback Builder	Email orchestration and fallback trigger after max call attempts without success	Allows preview/edit before auto-send	Mockups Done
Admin Rep Assignment Panel	Admin view to configure assignment logic (Zip vs Round Robin)	Includes override tools and status visibility	Mockups Done

User Workflows

1. BID is created → System assigns CSM Rep based on Rep Assignment Rule set by Admin
2. BD rep sets up a calendar meeting/call between CSM assigned to the business → System launches HubSpot calendar that has an integration with CSM's work calendar schedule for availability. Meeting Date and Time displayed by each end user's timezone.
3. Business is approved for accreditation → System triggers Emails 1–2 from HubSpot. Email 3 gets triggered if no call has been scheduled or call logs are null.
4. CSM works on 'New Application' dashboard → System triages businesses by Dashboard logic → Column to the most left and highlighted are most pressing--businesses with scheduled calls within 7 days irrespective if status is 'Approved' or 'In Review', sorted by scheduled date in ascending order. Second column shows Businesses with calls scheduled greater than 7 days irrespective of status "Approved" or "In Review", sorted by scheduled date in ascending order. Third column are Approved businesses that are unscheduled, sorted by approval status update date in descending order.
5. Rep attempts calls up to max attempts; logs call outcomes.
6. If call completed, notes and next steps are logged.
7. If unsuccessful, fallback email with calendar link is sent.
8. Business may also book directly via email link or self-service portal.

Accessibility & Usability

- Designs must meet WCAG 2.1 Level AA compliance
- Mobile responsiveness for calendar and dashboard views is required
- Minimum click depth: no more than 3 clicks to complete core tasks (call log, email send, booking)
- Form fields should have clear labels, inline validation, and logical tab order

Design System & Branding

- Components must align with BBB Great West + Pacific brand guidelines
- Font hierarchy, button styles, and iconography should be consistent with existing BBB digital properties
- Use of color should reinforce status (e.g., red = follow-up, green = complete, gray = backlog)

General UX Patterns

- All icons sized for minimum 44px touch target
- Sticky headers for navigation, filter, and sorting
- Use of standardized icons () across all modules
- Text fields should autosave or confirm unsaved changes
- Responsive drawer/slide-out for detailed record views

Wireframes & Prototypes

- **Includes:** Dashboard • Auto-Dialer • Call Logs • Rep Assignment Admin • Email Orchestration

- **Platforms:** Web & Mobile Responsive
- **Audience:** Design, Development, Product Strategy

Detailed UIUX Specifications by Module Follow Below

These specs provide visual, interaction, and responsiveness guidelines per functional area.

Section 1: Customer Success Rep Dashboard

Web View

- **Global Elements:**
 - Title: "New Active Applications"
 - Dropdown: Last 30 Days (default), Last 15 Days
 - Global search bar
 - Contextual rep info (Rep name + profile photo)
- **Column Layout:**
- **Column 1:** Scheduled (Next 7 Days)
 - Highlighted with blue border
 - Shows Approved + In Review
- **Column 2:** Scheduled (>7 Days)
 - Same layout logic, later scheduled dates
- **Column 3:** Approved – Not Scheduled
 - Mass Auto-Dialer icon in header
- **Card Structure:**
 - CSM Rep name
 - Business name (bold)
 - Owner/contact info
 - Business type, timezone
 - Call Status Tags (New, 2nd attempt, Final)
 - icons
 - Expandable: Call log, notes, fallback

New Active Applications Last 30 Days Global Search... Customer Success Representative: Nancy Smith

Scheduled (Next 7 Days)

ABC Business Solutions Apr 25, 2025 10:00 AM

CSM Rep: Nancy Smith
John Doe (Owner)
Seattle, WA (PST)
Technology Services
Approved New
"Looking to expand our market reach"
[Expand Details](#)

Green Earth Recycling Apr 27, 2025 2:30 PM

CSM Rep: Nancy Smith
Sarah Green (Operations)
Portland, OR (PST)
Environmental Services
In Review 3rd attempt
"Seeking certification for expansion"
[Expand Details](#)

Digital Edge Marketing Apr 29, 2025 1:15 PM

CSM Rep: Nancy Smith
Emily Brooks (Marketing Director)
Miami, FL (EST)
Digital Marketing
Approved 3rd attempt

Scheduled (Greater than 7 Days)

TechStart Solutions May 15, 2025 11:00 AM

CSM Rep: Nancy Smith
Mike Johnson (CEO)
Austin, TX (CST)
Software Development
Approved Final attempt
"Building enterprise solutions"
[Expand Details](#)

CloudNine Analytics May 20, 2025 3:00 PM

CSM Rep: Nancy Smith
Lisa Chen (Director)
San Francisco, CA (PST)
Data Analytics
In Review 2nd attempt
"Expanding data services globally"
[Expand Details](#)

Quantum Security Systems May 25, 2025 9:30 AM

CSM Rep: Nancy Smith
David Chang (Security Director)
Denver, CO (MST)
Cybersecurity

Approved - Not Scheduled

HealthTech Innovations

CSM Rep: Nancy Smith
Dr. Robert Wilson (Founder)
Boston, MA (EST)
Healthcare Technology
New
"Revolutionary healthcare solutions"
[Expand Details](#)

Smart Finance Solutions

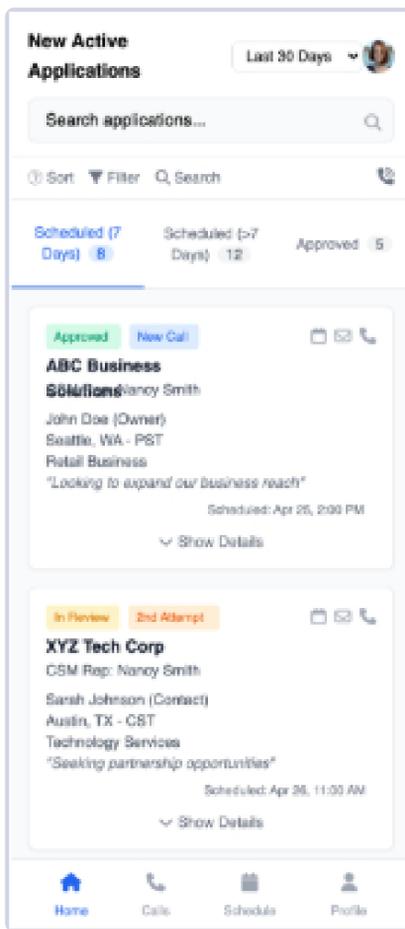
CSM Rep: Nancy Smith
Amanda Lee (COO)
Chicago, IL (CST)
Financial Technology
2nd attempt
"Modernizing financial services"
[Expand Details](#)

EcoSmart Solutions

CSM Rep: Nancy Smith
Grace Martinez (Sustainability Lead)
Phoenix, AZ (MST)
Green Technology
3rd attempt
"Sustainable energy solutions"

Mobile View

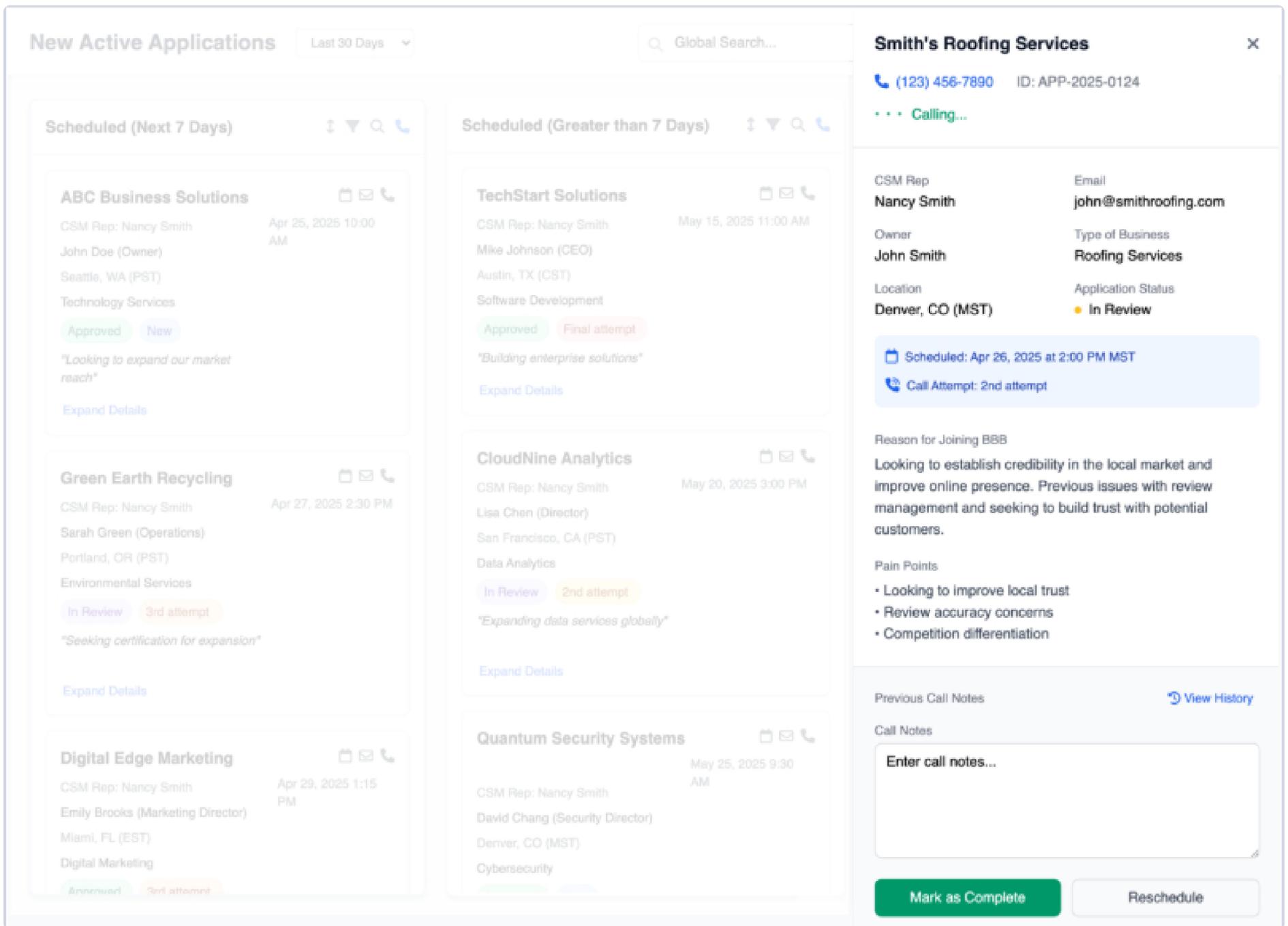
- Columns collapsed into **top tabs**
- Card UI simplified for vertical scrolling
- Icons grouped together at top of each card
- Expand behavior: toggles for Call Logs + Actions
- Global search and date filter are sticky



Section 2: Auto-Dialer + Call Log Interface

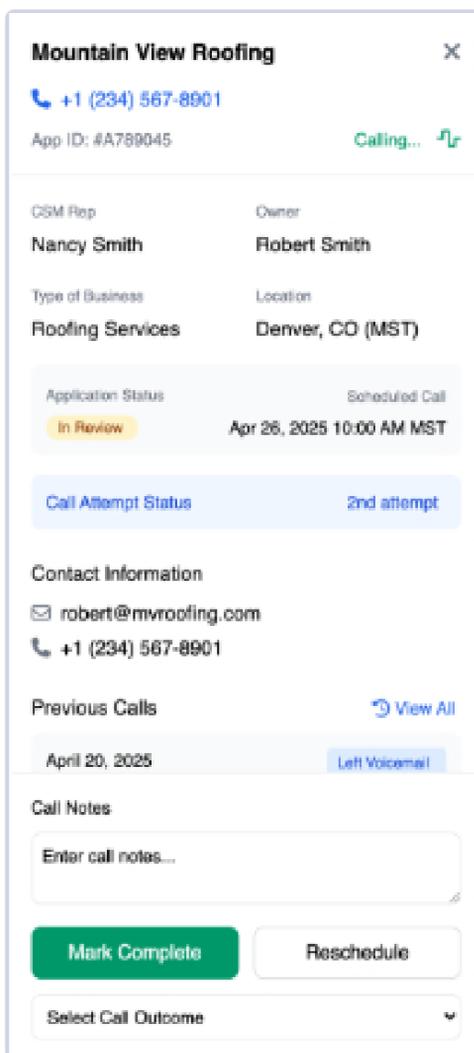
Web View

- **Auto-Dialer Panel:**
 - Launches from “Approved – Not Scheduled”
 - Start / Pause / Resume / Skip controls
 - Progress bar + Current Call status
 - “Calling...” label with active contact
- **Call Log Slide-Out:**
 - Opens on call start or card expand
- Top info:
 - Rep + Contact + Business Info
 - Application Status, Call Attempt Status
 - + + icons (live state)
- Input:
 - Notes textarea
 - Dropdown for call outcome
 - Buttons: Mark Complete, Reschedule



Mobile View

- Auto-Dialer as floating CTA button
- One business card active at a time
- Timer, icons, and reschedule shown inline
- Call Notes and Outcomes available with large tap areas



Section 3: Rep Assignment Admin (CS Admin View)

Web View

- **Main Views:**
 - Tabbed layout: By Zip • By Rep • By City • By State
- **Zip Code Table:**
 - Columns: Zip | Primary Rep | Backup Rep | Region | Last Updated
 - Filters: Unassigned, Missing Backup
- Mass Assignment dropdown
 - Assign by Zip / City / State
 - Buttons: Edit Assignment, Remove Rep
 - Stats shown: Total Zip Codes, Unassigned Count

Customer Success Assignment Tool

Location Based

Mass Assign

+ Add Rep

Export

Upload CSV

Search by Zip Code

Search by Rep Name

Search by City

Search by State

Search by Region

Filter by Primary Rep

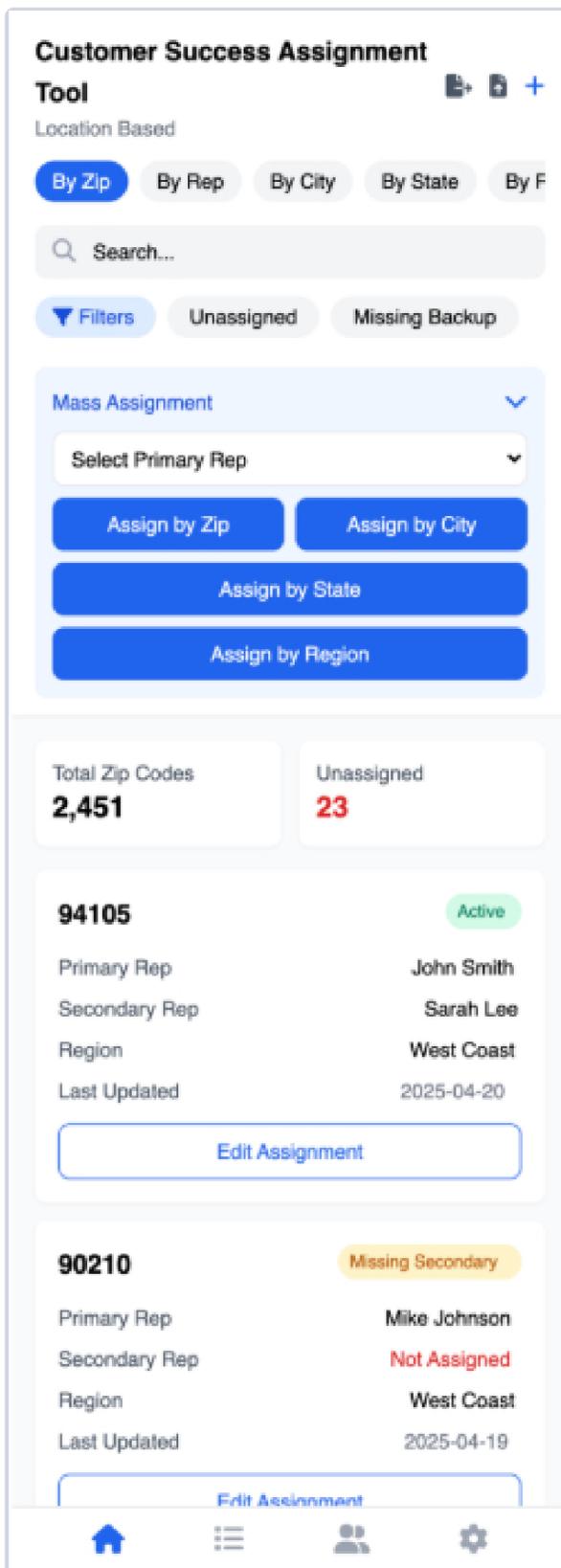
Filter by Secondary Rep

Show Only

<input type="checkbox"/>	ZIP CODE	PRIMARY REP	SECONDARY REP	REGION	STATUS	LAST UPDATED	ACTIONS
<input type="checkbox"/>	12345	John Doe	Sarah Connor	Northeast	Active	2025-04-23	
<input type="checkbox"/>	67890	Mike Johnson	Missing Secondary	Southwest	Missing Secondary	2025-04-22	

Mobile View

- Switch view shown as buttons or dropdowns
- Mass assignment uses a stepper interface
- Zip records shown as scrollable cards
- Edit Assignments and Filters fully mobile optimized



Future Enhancement : Round Robin Assignment Mode

Introduce a toggle in the UI to switch assignment logic between:

- **ZIP Code–Based (default)**
- **Round Robin (load balanced by rep capacity & call completion)**

When Round Robin is selected :

- System auto-assigns newly created BIDs evenly across eligible reps
- Logic prioritizes:
 - Rep availability
 - Lowest current caseload
 - Rep completion rate (optional)
- **UI Controls to Add:**
- Toggle switch or dropdown labeled: `AssignmentMode`
 - Options: `Zip Code` (default), `Round Robin`

- Tooltip/Info icon with explanation
- Fallback logic if no reps available (hold for manual assignment)

Round Robin Assignment Manager

Last Synced: 2 min ago
Force Sync Now

Active Reps

8/10

↑ 2 more than last week

Avg. Completion Rate

85.3%

↓ 2.1% decrease

Pending Assignments

3

Next assignment in 5 min

Avg. Response Time

1.2h

↑ 15min faster

Round Robin Assignment Mode

Enable Round Robin Logic

Max Active Caseload Per Rep

Re-enter Rep After Completed Call

Use Completion Rate to Prioritize

Assignment Queue

Next Up

Sarah Parker
Available in 5 min

Nancy Smith
2nd in queue

Jordan Lee
Paused

Rep Rotation Table

All Status All Regions

REP NAME	CURRENT CASELOAD	MAX LIMIT	COMPLETION RATE	LAST ASSIGNED	STATUS	ACTIONS
Nancy Smith	8	10	93%	2025-04-22	Active	⋮

Fallback Handling

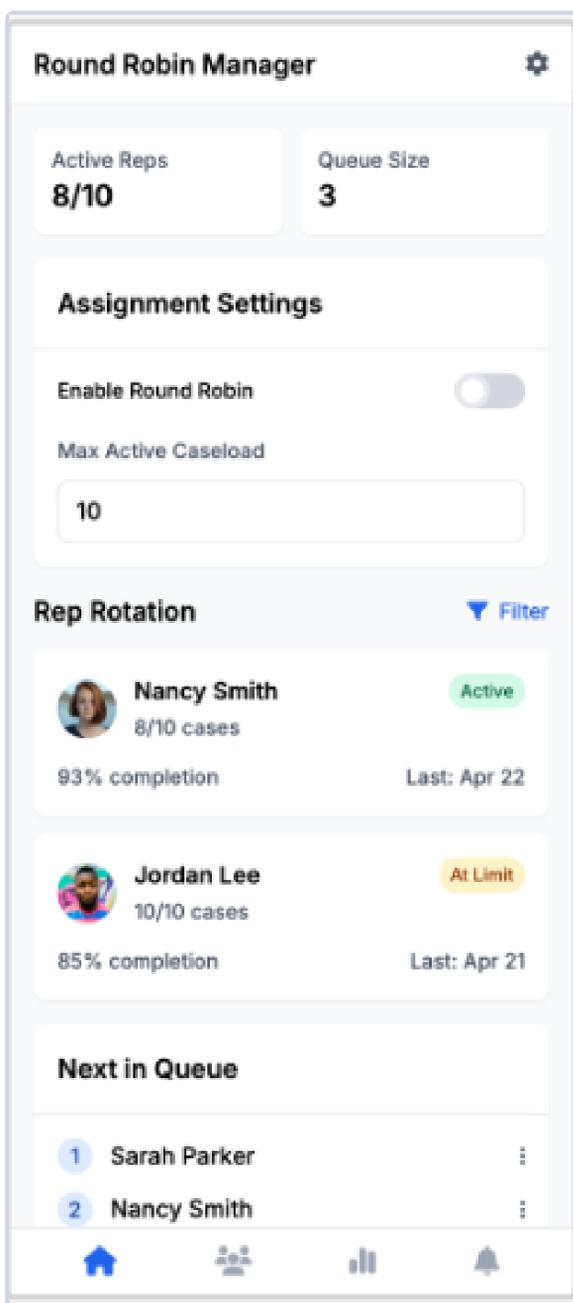
Hold in Pending Queue

⚠ 3 unassigned businesses in queue

Manually Reassign

- **Mobile:**

- Assignment Mode dropdown appears at the top of the mass assignment panel



Optional: Show current Round Robin queue status per rep as a visual (e.g., progress bar of open caseloads)

Section 4: Email Orchestration Interface

Web View

- **Email Logic Table:**
 - Email Name | Trigger | Delay | Attempt Limit | Fallback Assigned | Status
 - Actions: Edit, Upload Template, Assign Logic
- **Fallback Flow Builder:**
 - Visual drag-and-drop canvas
 - Logic blocks: Triggers → Conditions → Actions
- Examples:
 - Call Failed → Wait 2 Days → Send Fallback Email
 - Email Ignored → Escalate to Manual Review
- **Fallback Flow Sidebar:**
 - Edit delay, condition, template
 - Add new step or action
 - Preview fallback template

Email Orchestration

History

Test Send

Trigger Settings

+ Add New Trigger

Email Name	Trigger	Delay	Max Attempts	Fallback Email	Status	Actions
Email 1: Welcome	On Payment	0 Days	1	N/A	Active	

Template Library

Preview

Upload Template

Welcome Email Active

Last updated: Apr 24, 2025

HTML Template

Fallback Email Logic

Fallback Delay ?

3 Days

Fallback Email ?

Select Template

Fallback Chain

- Primary Email
- Fallback #1

Send Settings & Auditing

Enable Trigger Toggle email trigger on/off

Max Attempts

3

Recent Activity

- Welcome email sent to john@example.com
2 hours ago
- Bounce: CEO Welcome to sarah@example.com
5 hours ago

Save Changes

Fallback:

Fallback Logic Builder

Configure email fallback sequences and conditions

Last edited: Apr 24, 2025 15:27

+ New Flow

Email 3: Book a Call

Flow Status:



Trigger

Email 3 Sent (Book a Call)
Initiates fallback sequence

Condition

No Call Scheduled
Wait 3 days

Action

Send Benefits Overview
Template: Benefits-Overview-01

Add Node

Triggers

Email Sent

No Call Logged

No Email Open

No Click

Actions

Send Email

Log Reminder

Suppress Email

Notify Admin

Timing

Add Delay

Wait Until

Node Settings

Delay Duration

2 Days

Template

Benefits Overview



Save Flow

Mobile View

- Email logic shown as accordion list with filters
- Fallback flow shown as tappable logic steps (not drag-and-drop)
- Edit modals slide up full-screen

Email Workflow

We currently don't support export this widget

Email Workflow

Active Flows **24** | Sent Today **156**

Email Triggers

[+ Add New](#)

- Welcome Email** Active
Trigger: On Payment
Delay: 0 Days
- CEO Welcome** Active
Trigger: Application Approved
Delay: 1 Day

Template Library

Upload new template

Fallback Logic

Fallback Delay: **3 Days**

Fallback Email: **Select template...**

[Emails](#) | [Templates](#) | [Analytics](#) | [Settings](#)

Fallback Builder

Fallback Builder

Current Flow: **Book a Call (Email #3)** | Last edited: 2h ago

- Start: Email Sent**
Trigger: Book a Call Email
- Check Condition**
No Call Scheduled
After **3** Days
- Send Email**
Benefits Overview

[Undo](#) | [Preview](#) | [Clear](#)

Section 5: Calendar Booking Form Specification

Web View Details

Component	Behavior
Calendar Picker	Displays available dates dynamically based on assigned CSM's availability
Time Slot Selector	Appears after date selection; times are timezone-adjusted for user
Timezone Display	"Your Timezone " auto-detected + optional "CSM Rep Timezone "
Prefill Fields	Contact Name, Business Name, Assigned Rep Name (if data available)
Mandatory Fields	Business Contact Name, Business Name, Reason for Accreditation, Value Hoped from BBB, Biggest Business Challenge
Optional Fields	Preferred Topics or Concerns, Services Interested In, Best Time/Method to Reach You
Mobile Optimization	Vertical stacked fields, sticky date/time summary, tap-friendly multi-select
Form Progress	Auto-save entered data if form is abandoned and resumed within browser session

Onboarding Questions Captured

- Primary reason they want to get accredited (Short Text)
- What value they are hoping to gain from BBB? (Paragraph Text)
- Preferred topics or concerns (Optional Short Text)
- What services are you most interested in? (Multi-select or Checklist)
- Biggest business challenge? (Paragraph Text)
- Optional: Best time/method to reach you (Short Text)

Data Stored

- Selected Date and Time
- End-User Timezone
- Business Contact Name
- Business Name
- Assigned Rep Name
- All onboarding question responses
- Booking metadata (timestamp, Calendar_Invite_ID)

Confirmation Page After Booking

Element	Behavior
Message	"Your onboarding call with [Assigned Rep Name] is confirmed!"
Summary	Date, Time, Timezone, CSM Rep Name, Optional Profile Photo
Call-to-Action	Buttons to add event to user's calendar (Google, Outlook, iCal)
Optional	Quick link to reschedule if needed

Schedule Your BBB Onboarding Call
with Sarah Johnson, Customer Success Manager

1 Select Date & Time

2 Your Information

3 Confirmation

< April 2025 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5

Available Times

Your Timezone: Pacific Time (PT)

CSM Rep Timezone: Mountain Time (MT)

Your Information

Business Contact Name

Business Name

Onboarding Questions

Primary Reason for Accreditation *

What value are you hoping to gain from BBB? *

Services You're Interested In

Accreditation

Dispute Resolution

Customer Reviews

Business Directory

Biggest Business Challenge? *

Schedule Meeting

Mobile View

- Full-width calendar view collapses to mobile screen size
- Scrollable onboarding questions after date/time are locked
- Confirmation page optimized for small screen, minimal scrolling

Schedule Your BBB Onboarding Call ✕

 You're scheduling a call with Sarah Johnson

Select Date & Time

S M T W T F S

28 1 2 **3**

9:00 AM (30 min)

10:30 AM (30 min)

2:00 PM (30 min)

🌐 Your timezone: Pacific Time (PT)

Your Information

Business Contact Name

John Smith

Business Name

Smith Electronics

Onboarding Questions

Primary Reason for Accreditation

What value are you hoping to gain from BBB?

Services of Interest

Accreditation Reviews

Dispute Resolution Business Profile

Biggest Business Challenge?

Confirm Booking