**Cricket Aktivate Topline**

**Phase 0 - Discovery Prep**

**11.8.22**

*The following findings are a summary of visiting two Cricket locations, Brookhaven and College Park, in the Atlanta area. The team spent one day in each store, observing customer interactions and interviewing advocates.*

*Due to the limited time spent in store and single market view, all findings are considered preliminary at this point and should be used as a basis to continue Discovery, instead of finalized findings. Please see* ***Phase 0 – Aktivate POS*** *deck for opportunities and next steps.*

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**Aktivate Interface:**

* **Advocates felt the Aktivate interface was intuitive, easy to use, and provided the ability to complete key customer tasks quickly.**
* Based on UX best practices, projekt202 recognized areas of potential optimization in the interface, however advocates did not make note of navigational or interface challenges that impact their workflows.
  + Efficiencies can be gained by reducing redundancies and clicks, providing actionable feedback messaging and simplifying the language throughout.
  + Simplifying the overall experience to create hierarchal clarity and minimize visual clutter to set Cricket up for long-term design scalability.
  + Designing an intelligent system to influence Advocate behaviors and actions to provide a more personalized customer experience.
  + For more details please see the <insert deck name here> presentation.
* It was noted from one tenured advocate that Aktivate was a significant upgrade from the POS system utilized previously.
  + *“We never expected Aktivate was going to be so great when we were moving over from the old system. It is perfect in comparison.”*
* **While advocates felt they could complete most key customer tasks within Aktivate, there are a few tasks only the call center can complete, but ideally could be handed in store. When advocates are forced to call customer service to complete tasks in store, it adds time to the transaction and can frustrate customers.** 
  + Advocates would like to be able to cancel a line in store but mentioned they do not have the ability to do it in the system.
  + One advocate mentioned they would like the ability to re-activate a suspended 3G line. This advocate felt the advocates are generally limited in what they can do for customers who have suspended accounts.

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**RQ:**

* **Overall, there were limited complaints about RQ. Advocates primarily use the system at the beginning and end of the day, and rarely have to utilize it throughout the day.** 
  + For store manager level and below, key RQ tasks include checking inventory, adding new inventory, opening and closing the cash drawer, and clocking in and out. There were no major complaints about these tasks.
  + At the district manager level, RQ tasks are expanded to include reporting, checking transactions, and confirming commission.
    - One advocate noted *“RQ gives me everything I need, and even more than what I need.”*
  + In one store, we witnessed a phone that wasn’t scanning into the system right away, but the advocates were ultimately able to get it to work. It was noted that every once in a while, small issues like that arise in RQ, but are easily fixable.
    - According to the two stores visited, major crashes in RQ do not happen frequently.
    - Some advocates noted issues with being unable to log-in, but in this location, it never happened to both staffed advocates at once, so they were still able to have access to the system.
    - In one store, advocates noted that they get an “initialization machine” message often during transactions, which increases the transaction time.
* **While some advocates noted it would be “nice to have” RQ functionality included in Aktivate, (specifically cash management and inventory), there was not a sense of urgency around moving the functionality over.** 
  + One advocate noted cash skimming would be ideal to include in Aktivate as she will have to go into the backroom (with the only store desktop) to do this on transactions over a certain amount.
* **While individually Aktivate and RQ received generally positive feedback, integration break-downs between the two has caused some major issues in store.** 
  + In one store location, a RQ “outage” occurred a few months ago and lasted about five days.
    - When advocates got to the payment portion of the transaction, their screens would go blank. On the first day of this issue, advocates did not yet have a workaround and lost a full day of sales.
    - On the following days, they learned about the “touchless checkout,” which advocates had not yet been notified about and/or trained on and used that as a workaround.
  + In another store location, there has been a consistent issue where Aktivate will show a payment as “accepted” for the customer, and the transaction will be “pending” with the customer’s bank, however the transaction didn’t fully process through RQ.
    - These situations turn aggressive quickly with customers. They feel like Cricket is “stealing” their money since they cannot access the funds in their bank account until they stop pending, and are unable to walk out of the store with the phone they just “purchased.”
    - Even offering a free item, like Bluetooth, when the customer comes back to complete their order, does not always diffuse the situation.
    - This situation is especially harmful when it occurs on Friday or Saturday since the bank funds won’t be released until Monday. For low-income individuals, not having access to the funds from their bank can be detrimental.
* **While it is unclear to advocates exactly where payment processing issues stem from, they often run into issues when finalizing payment or providing receipts.** 
  + Many customers come in requesting Apple Pay, but advocates mentioned the tablet devices do not support tap to pay functionality. In this case, if a customer doesn’t have cash or a card, they must leave and come back.
    - *Note:* *Since there was Cricket representative in store during research, they noted that the device does support tap to pay.*
  + When selecting “mobile pay” on the interface, customer’s rarely will the receive the text from the system. Similarly, touchless pay can be spotty if the customer receives a text to continue payment.
    - In these cases where customers do not receive the text, advocates can send a text to their own phone to continue payment as a workaround.
  + While many customers request digital receipts post-payment, and the advocate selects digital receipt on the interface, customers note they never receive the e-mail.

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**POS Device (Tablet & Desktop):**

*Note: Brookhaven location was a three tablet store, with one desktop only located in the backroom. College Park location had two desktops and one tablet on the sales floor. All findings are gleaned from this perspective.*

* **While the two stores had different device set ups, (three tablets versus two desktops and one tablet), the stores primarily used the devices the same way. Two devices, regardless of tablet or desktop, were being utilized as a true POS, and one tablet was primarily used for high traffic times or as a station for customers to fill out financing/ACP information privately.** 
  + In the tablet-only location, the tablets are often used at their port stations unless the store is very busy.
  + Advocates in this location don’t feel comfortable using the POS station in the middle of the store for sales because it is too easy for customers to steal a device. There is no place to “hide” the phone during the activation process like they have at the desks.
* **In the tablet-only location, the detachable credit card payment processor on the device caused multiple issues for advocates.** 
  + The payment device died very quickly since it does not remain charging while attached to the tablet, and advocates had to keep that it charging at all times at one of the store desks.
    - *Note: Since there was Cricket representative in store during research, they noted that the tablet should be able to charge the payment device and fixed it for the advocates.*
  + The Bluetooth connection between the tablet and payment processor frequently disconnects. Advocates consistently need to re-connect the Bluetooth and/or restart the device. Often, advocates will ask if customers have cash because it is faster than trying to get the device to re-connect.
* **Advocates who use both the tablets and computers have differing opinions on which device they prefer, however there was no resistance to using tablets only if the stores were to move that direction.** 
  + Advocates noted the readability, ease of typing, and usage of the tablet interface was easy to use.
  + For advocates who prefer using the computer, they noted it is because they learned on that device and feel more comfortable with it. However, they are still able to easily use the tablet for all key customer actions.
  + One advocate noted that load times seem to be slower on computers than the tablets.
  + Advocates noted that scanning bar codes directly from the tablet device can be challenging since it detects all bar codes at once. As a workaround, many of them try to cover the other barcodes with their hand to scan accurately and avoid typing in the number on the interface.
  + One advocate preferred the tablet device because it puts more of the actions into the advocates’ hands so they can move quicker, rather than waiting for customers to make selections, sign, etc. as they need to on the desktop attached trackpad.

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**Policies & Programs:**

* **Customers are resistant to showing ID for account look-up and completing transactions. Since this is a new policy, many customers are not yet used to it, and some feel generally uncomfortable providing identification.** 
  + Due to the large number of undocumented immigrants in some regions, showing ID has become one of the largest barriers to signing up with Cricket. Customers are not willing, or do not, have documentation to provide – and/or they are too fearful their information will be used maliciously by the company.
  + We witnessed many customers come in to complete simple transactions, like bill pay, without their ID. Often they would be able to go out to their car to grab their identification, but made the advocates aware they were unhappy with this change.
    - Especially for existing customers, it is confusing why they need to bring their ID every time since Cricket already saw their ID upon activation.
  + Due to this change in policy, multiple customers who did not sign up for Cricket using their legal name have had issues in accessing their account or changing it to match their identification card.
    - According to advocates, this type of account information change cannot be completed in store and must go through the call center.
  + Metro is one competitor that has not switched to the government regulated ID requirement. While this will not be a differentiator in the future, many customers in this area currently choose Metro for this reason.
* **Due to the low-income status of many customers, they are eligible for financing and ACP benefits. While they appreciate the advocates making them aware of these benefits, many struggle to, or do not want to fill this information out on their own.** 
  + In both locations, advocates have one tablet device primarily dedicated for customers to sign up for these programs in real time.
  + Advocates typically stand by the customer and are available to help with ACP questions, but legally cannot fill out the information for the customer since it is PII data. However, many customers struggle to fill it out on their own or refuse. This puts the advocate in a tough situation because they want the ACP credit but cannot receive it if they don’t complete the forms for the customer.
    - If a customer is unable to read or type on the tablet, the advocate will step in to help the customer. This can happen because of language barriers or a lack of comfort with tablet technology.
    - We witnessed one interaction where a customer said they wanted ACP, but told the advocate “do it for me,” because they simply did not want to fill out the information. Advocates mentioned many customers are “lazy” and do not want to do it themselves.
  + With multiple POS portals in the store, advocates appreciate they are able to work on the activation at the same time customers are filling out the financing or ACP forms.

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**Key Customer Actions:**

* **Customers come to the store for a few primary reasons: bill pay, device & plan activation, and general questions. Upgrading or downgrading a plan also occur but were noted to be less common than the others.**
* **Bill pay generally tends to be a very quick, seamless interaction; however, advocates still run into issues when customers want to make a payment without providing identification or their Cricket PIN for account lookup.** 
  + One of the biggest issue advocates run into with “quick pay” interactions are when customers don’t know their number or provide the wrong one.
    - There have been multiple instances in one location where customers pay to the wrong account and cannot be refunded. Advocates warn them of the risk to make a payment without confirming their number with an ID, however it still occurs.
  + Customers often come into make an in-store payment without knowing how much they need to pay, and do not have an ID for account lookup. In this case, advocates will dial customer service from the customers phone to provide an automated balance due if they have their phone in-store.
    - If customers come in and pay the wrong amount, even if they are under payment by only a few dollars, their account will be suspended, and they have to pay a fee upon next payment.
  + In both locations, the majority of payments are completed in cash.
* **Advocates felt that the process of understanding a customer’s needs, walking them through plan and device options, and the overall activation flow tends to be straightforward. Where activation gains complexity and length in transaction time is during the port-in process from another provider.**
  + Activating a new plan & device without port-in takes maximum 15-20 minutes and generally goes very smoothly.
  + Porting-in a new number is the longest transaction advocate’s encounter. Often times, the length of this is due to customer’s not having their existing account number and pin from their previous provider or providing the wrong pin.
    - In these scenarios, advocates will often try to work with customers and call the customer service of the existing provider to get the information. However, many times customers must obtain this information from the retail store of their current provider.
    - When a customer’s port in information causes an error in the system, advocates might need to contact the helpdesk or have the customer check their info with the existing provider and then come back and re-start the interaction. Due to this, the transaction can get lengthy.
    - Advocates noted that they appreciated when Aktivate moved the “port-in check” earlier in the activation flow. This allowed them to catch issues with the port-in earlier in the process, which saved wasted time. They felt the earlier in the process this checkpoint is, the better.
  + One advocate noted there has been a lot of feedback that promotions for new customers are far better than those for existing customers. This has been an issue when trying to sell to their existing, loyal customers.
  + It was noted that online Cricket promotions do not always match in-store promotions, which can confuse customers and drive sales outside the store.
  + Having AT&T network and calls to Canada/Mexico are two key selling points advocates often use for activation sales.
    - Metro has highly competitive promotions, and they will often lose customers to Metro’s device deals regardless of Cricket’s stronger service.
* **While the primary intention of retail is to sell, often times customers use it as a service center when the call center fails, or because they prefer a face-to-face interaction. Overall, advocates noted a negative impression of call center service from their perspective as well as customers.** 
  + Many customers consider the store a technology center for their device. In these cases, if the store isn’t busy, advocates will take time to attempt to help customers on actions they know how to complete. If the store is busy, advocates will direct them to the call center.
    - Some of the most common actions advocates help customers with are downloading apps, setting up voicemails and e-mails, software updates and transferring information from existing to new devices.
    - When a customer has an issue with their phone that is outside of the store’s capability to assist, such as a broken phone, customers can become frustrated since they assume the person who sold them the phone should also be the one to fix it.
  + While the advocates we spoke with know these actions do not ultimately help their sales commissions, they felt the customer service aspect of their job was just as important to getting repeat customers.
  + The biggest complaints advocate hear about call center from customers is that the menu is confusing and too long, so many people struggle to even speak with representative.
    - While there is a “Spanish” option in the automated call center flow, advocates noted that their Hispanic customers struggle with getting through the automation.
    - Advocates note that they are treated in the same way as customers by the call center with long wait times, poor service, and sometimes get hung up on mid-interaction.

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**Retail Store & Culture:**

* **In both store locations, the sales culture was one of comradery instead of competition. The store environment had a laid back culture, where customers seemed comfortable with advocates and not pressured to rush through a interaction.**
  + Managing the queue at both locations occurred without a formal process. Customers are treated in a first come first serve basis.
  + Typically, advocates serve one customer at a time, but if the store is extremely busy, they are able to complete quick interactions (e.g. bill pay) while still working with another customer on a longer interaction (e.g. activation).
  + There is no set process for how advocates divide sales to get commission. In both stores, there was an unspoken “you go then I go” for assisting sales customers.
  + Advocates liked having a whiteboard tracker of their sales in the backroom. It was used both as a motivator towards their goals, and a way to track progress.
  + While we only spoke with one district manager, they mentioned hiring is one of the most difficult aspects of the job. Often, they will have to step in and take over advocate responsibilities when advocates don’t show up or cannot complete their tasks.

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**Training & Communication**

* **Advocates mentioned communication comes from Cricket in a variety of ways. Sometimes they join large regional Cricket calls, other times they learn from their district manager during team meetings in store, and they also have a group chat where the information is relayed. While Exceed was mentioned, it did not seem like advocates frequented the portal often.** 
  + While regional Cricket calls are still useful, advocates noted that the in-person manager meetings tend to resonate the most.
  + Advocates mentioned they have not seen many updates to Aktivate since joining Cricket, and didn’t note any singular way they find out about new functionality within the system.
    - In one location, they “accidentally” found out about the release of touchless payment when they had to use it as a workaround during a RQ outage.
    - In another location, they noticed one day that the port-in check was moved up in the workflow but didn’t receive any notification about this change aside from seeing it in a new place in the flow.
* **Advocates seemed to have inconsistent experiences in the rigor of their initial Cricket training. While they all mentioned the online videos and training were somewhat helpful, the most impactful training was being taught by another advocate or learning in real time during customer interactions.** 
  + Advocates consistently noted that running through workflows with a co-worker, or executing them with a customer, was a much more impactful learning experience than online formats.
  + Learning how to use Aktivate for key workflows was one of the easiest parts of advocate training, they felt it was quick and intuitive to learn.
    - ACP and Port-In’s were mentioned as the two aspects of the job that were the hardest to learn.
  + Stores that have multiple advocates working at the same time had a more positive impression of their training experience.
    - One advocate noted that when she was onboarded, it was in a store that only had one advocate working at any given time. In this case, she had to be on Facetime with an advocate from another store to train her and answer questions in real time while she was with customers.

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*As noted above, these preliminary findings will be used to determine areas of opportunity for further exploration. This documentation is to be used in a limited capacity until Discovery is complete.*