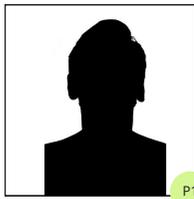


Main Persona: Abby



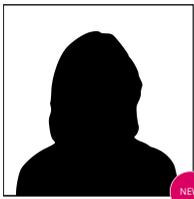
Call Center Rep Inbound (Mid Market and Large Market)

Main Persona 2



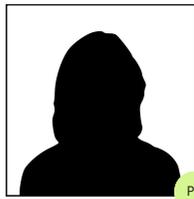
Outbound Rep

Secondary Persona



Advice Center

Tertiary Persona



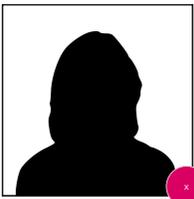
FCU

Tertiary Persona



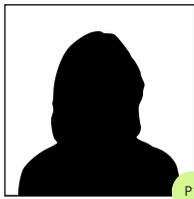
Account Manager

Tertiary Persona



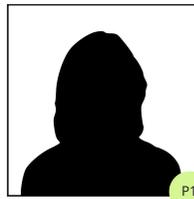
Call Center: QC Reps

Tertiary Persona



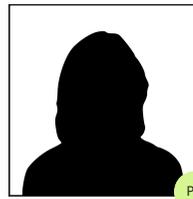
Processor: QC Reps

Tertiary Persona



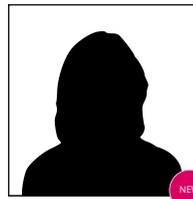
Participants

Tertiary Persona



Production Support

Tertiary Persona



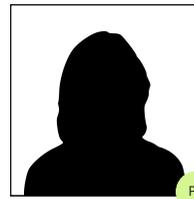
Sponsors and TPAs

Tertiary Persona



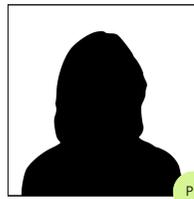
Hardship Committee

Tertiary Persona



Audit and Controls (Viewer audience)

Tertiary Persona



Admin

Search and find ppt

NOTES:

The needs and responsibilities are exactly the same as the inbound reps

Differences: Outbound rep will need to view queue with participants with NGOs. This will require a separate link in Unqork to launch this queue

Needs: A global search for a participant and a queue with ppts. with NGO

Needs: Also has cross selling opportunities as well

NOTES:

Follow up: Confirm requirements

★ Need follow up Brad Norton

NOTES:

Follow up: Confirm requirements  
User Journey

★ Need follow up Katlin Kreuger

NOTES:

Follow up: Confirm requirements  
User Journey

★ Need follow up Katie True

NOTES:

Follow up: Confirm requirements

★ Need follow up Abby Wickersheim

NOTES:

Follow up: Confirm requirements

Responsibilities for phase 2

Guide customers on money out transactions

Responsibilities for phase 2

Guide customers on money out transactions

Responsibilities for phase 2

Key Rollover for ppt vs blank form

Same process as inbound but what are the differences

Responsibilities for phase 2

Verification workflow

Dashboard update

Responsibilities for phase 2

Responsibilities for phase 2

New guided workflow process will bypass the QC process

Responsibilities for phase 2

Mirror phase 1.2 but will include additional transactions

Keep in mind: workflow changes per transaction

Responsibilities for phase 2

More interaction with CC. Guided workflow

Transaction Summary and quality and verify

Engage with sp

Responsibilities for phase 2

Managing day 2 items or issues with transaction. Part phase 1

Responsibilities for phase 2

Approve digital transaction online through existing portals

Transactions not used to approving. If paper is not involved and approval needed. Then require their involvement.

Requires signature sheet: New content. Needs to be clear on new process.

Responsibilities for phase 2

Review/Approve/Deny hardship proof

Facilitate hardship transactions

Contact ppts

In Unqork

Only hardships go to this persona

Responsibilities for phase 2

Review history and comments for independent research

Using Referencing Look Up for individual transaction for documentation

In Unqork

Responsibilities for phase 2

Manage access to new personas in P2

Would need to view a queue of ppts need to reach out to Global search for ppts. Search and find ppt Direct link to Unqork with a query to ppts with NGOs

Separate experience in Unqork

Cross selling opportunities? Route to advice Confirm their UX

Need to follow same flow Currently on Salesforce

Need to review final items that are based on a score Need to define workflow