Bliss Agent Sandbox

Have you received the REQUIRED approvals?			
Function	**Name**	**Action**	**Reviewed**
CO PM	Shashaank / Gaurav	I've reviewed this PRD.	[Date]
CO EM	Hari Sateesh Jatin	I've reviewed this PRD.	[Date]
Global L&D	Joost		
Product Legal	platform-legal@	I've reviewed this PRD.	[Date]

Problem statement

Bliss agents today have ~5 weeks onboarding process before they start actively solving contacts. Right now agents are trained on Bliss through various collateral like PowerPoint, online video tutorial, and a Bliss simulator (developed by a firm outside of Uber). Right now there is no for an agent to have an experiential training on Bliss for their on-boarding. As a result even after the 1-month training, agents don't feel comfortable using Bliss in the initial few weeks since they have never tried the tool themselves and they are now working directly on live contacts. This results in 2 things -

1. Agents don't have the confidence to resolve the contact by themselves and loop in their managers much more often, esp when it comes to contacts that require money-related issues.
2. Agents make mistakes while solving a contact and thus their R^2 metrics drop off impacting their performance.

Thus, a lack of experiential training for agents, where they can use Bliss without impact live contacts leads to inefficient training of agents during their on-boarding.

Projected impact

By providing a Sandbox environment for the agents, L&D teams will be able to train the agents better and faster which should result in

1. Shortened training time for agents (on-boarding or re-training)
2. Improvements in R^2 metrics of agents in the first X day of solving live contacts. This should help in the reduction of accidental money given out to customers

Summary of changes and requirements

[P0] Blocking requirement. The product will not launch without it.
[P1] Not required for launch. Needed post-launch.
[P2] Wishlist item. Capturing for visibility but not part of the product development scope.

Pri	Requirement
Routing	
P0	Allow same CTs as live CTs but on a sandbox environment
P0	Allow routing of CTs within the sandbox environment when an agent changes the CT
P1	Allow creation of custom sandbox queues by L&D for testing
Agent Admin	
P0	Tag agents who are under training so those agents can't access live contacts even if they have url
P1	Bliss Classroom: allowing trainers to add users to a virtual classroom where they can review the solved tickets for their cohort
Agent Experience	
~~P0~~	~~Have a separate URL for Sandbox~~ [Not needed]
P0	Allow user unique versions of a ticket, so multiple agents can practice with the same ticket without seeing other agents responses (for example: adding a / username in the URL to indicate which version of the ticket this is)
P0	Make all (new) widgets, Contact Types & Saved Replies available on Sandbox immediately
P1	Show a different UX for top header so agents can differentiate between live and sandbox environment
P1	Allow user to switch to Sandbox profile from the Bliss header
Data Model	
P0	None of the actions in Sandbox impact any actual Uber customers
P0	Sandbox imports tickets from production, but uses randomized names for customers (for GDPR compliance)

P0	Reset the data once the agent or trainer wants a fresh start.
P0	Whitelist WalkMe
P0	Works with test accounts
P1	Create a copy of the data set per agent so all agents can be configured to see similar contacts and their training collateral can be the same.
Channels	
P1	Create sandbox environment for Phone
P1	Create sandbox environment for Chat

User flows and use cases

Overview of current agent onboarding
In the current state, agents have an onboarding duration of anywhere between 2 and 5 weeks.
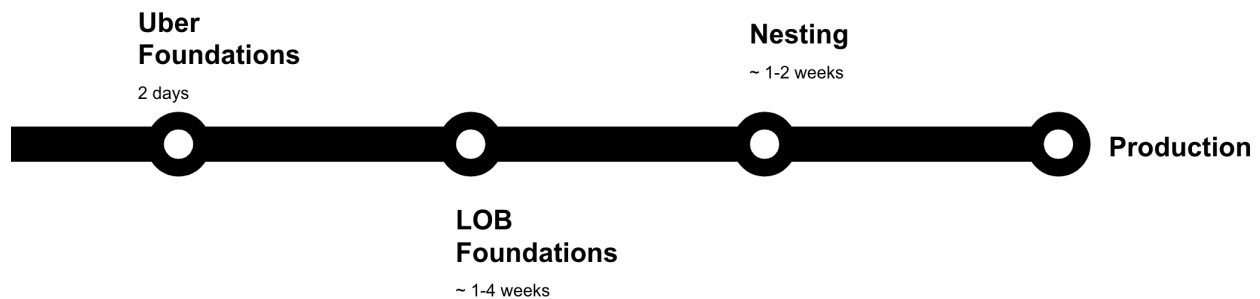
Uber Foundations
- Introduction to Uber, CommOps and their role
- Introduction to systems and tools (including Bliss)

LOB Foundations
- Training on Contact Types that the agents will support for their LOB
- Blended learning: instructor-led training (slide decks), e-learning and sandbox practice

Nesting
- End of formal classroom
- Agents start solvings contacts (tickets, phone calls, chats), under supervision of a mentor or trainer

Use Cases of Bliss Sandbox in onboarding
Uber Foundations
- Agents are introduced to the Bliss interface
- Trainers share a Bliss Sandbox contact with agents, so they can practice with the basic contact solving flow of Bliss (select Contact Type > open Knowledge Base > investigate > choose Saved Reply > solve

Required features for MVP:

✅ Agents are able to select from the same Contact Types and Saved Replies as in production

LOB Foundations
- Agents practice with the Contact Types they need to resolve while in production
- Three different training Bliss Sandbox scenarios:
    - **Trainer Solve:** trainer solves one Sandbox contact on the screen to introduce agents to the Contact Type
    - **Group Solve:** trainer shares one Sandbox contact on the screen, lets the group solve the contact together by asking guiding questions
    - **Individual Solves:** trainer shares contact(s) for agents to solve by:
        a. Sharing the [Bulk Scenario View](#) with agents and assigning tickets to them
        b. Tagging agents on a Bliss Sandbox Training Queue

Required features for MVP:

✅ Agents can use basic functionality of Bliss actions and widgets to resolve contacts

✅ Trainers are able to guide agents to a specific Bliss Sandbox contact (via Bulk Scenario View)

Required features for Phase 2:

❌ Sandbox can copy a production account 1:1, so agents have all historical context of the account available to practice with

❌ All widgets are fully functional

❌ Bliss Queues does not serve the same copy of a ticket to a user again

Nesting
- After classroom training, agents are put on Sandbox queues to solve contacts
- When agents hit the minimum quality tollgate for their solved contacts, they graduate and move to production

Required features for MVP:

❌ Sandbox can copy a production account 1:1, so agents have all historical context of the account available to practice with

❌ All widgets are fully functional

❌ Bliss Queues does not serve the same copy of a ticket to a user again

❌ Bliss Sandbox provides feedback on what the right answer and actions would have been

Use Cases of Bliss Sandbox for upskilling
- Agents are trained on and practice with new Bliss widgets using Bliss Sandbox

Required features for MVP:

✅ Agents can use basic functionality of Bliss actions and widgets to resolve contacts

Required features for Phase 2:

❌ All widgets are fully functional
❌ Bliss Sandbox provides feedback on what the right answer and actions would have been

---

Platform dependencies

CO will need all services that the system calls (marketplace, money, risk etc) to have a staging/ sandbox environment

---

Success metrics and experiment plan

Success metrics

- **Time to Proficiency**
  - Reduction of 25% expected by combining Bliss Sandbox with [Workflow Learning Solution](#)
  - Estimated cost savings of $3.5m annually

- **Design & Development Time**
  - Reduction of 10% expected by instructional designers not having to create and maintain custom e-learning modules for new Bliss Features, by combining Bliss Sandbox with [Workflow Learning Solution](#).
  - Estimated cost savings of: $90k annually

- **R^2 (quality)**
  - A better understanding of Bliss will ultimately help agents perform the correct actions to solve contacts

- **AHT (average handle time)**
  - Agents will navigate Bliss more efficiently which decreases average handle time

- **CSAT (customer satisfaction)**
  - Faster issue resolution results in higher CSAT

Constraining metrics

Could your launch have unintended consequences on other metrics--especially key KPIs of other teams? If so, what metrics do you plan to monitor and why?

Phase wise Plan

Phase 1 Approach: We will use the existing Bliss instance and provide the ability for training agents to interact with test contacts for high volume contact types:

User Stories:
   a) As an L&D program manager, I should be able to setup and maintain **L&D queues** to assign agents undergoing training to training specific queues.
   b) As an L&D program manager, I should be able to create test contacts and trips to be assigned to **L&D queues**.
   c) As an agent undergoing training, I should be able to interact with test contacts on Bliss Sandbox without impacting production contacts.
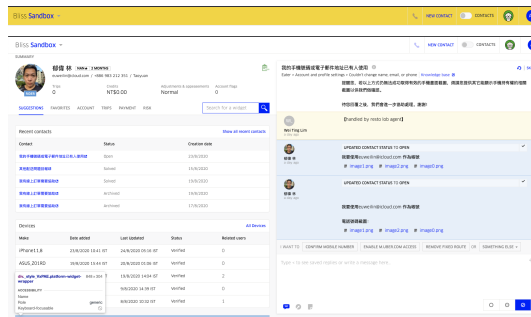
Functional Requirements

Pri	Requirement	Effort
Routing		
P0	Support mapping 'agents in training' to test queues	
P0	Allow creation of custom sandbox queues by L&D for testing	
P0	Mapping test contacts (should be in production CTGs) to test queues	
Bliss Frontend		
P0	Tenancy to be used as a flag to identify test contacts	
P0	Bliss Agent UI - Show a different UX for top header so agents can differentiate between live and sandbox environment	
P1	Bliss Admin UI - Highlight on UI: i) agents/queues in training - Queues ii) test contacts/trips - Search results	
Creation of Test Contacts		
P0	Ability to create i) test contacts - ii) trips iii) users in bulk	
P0	Ability to assign test contacts to test queues	
Metrics		
P0	Changes in base data queries to filter out test contacts using tenancy flag	

Detailed Requirements

#	P	Requirement	Experience
Creation of Test Contacts			
1	P0	**Ability to create test contacts in bulk** 1. The L&D should be able to create multiple contacts for the following account types: ◯ Rider ◯ Eater ◯ Restaurant ◯ Partner-driver ◯ Delivery partner ◯ Emobility ◯ Freight haulier ◯ Freight shipper 2. L&D team should be able to provide the following inputs while creating a contact: 1. Contact Type 2. Test user Account 3. Trip/Order attached to <Can we specify different scenarios?> **4. User message** **5. No of contacts to create** **6. Test Queue to assign contacts to <TBD>** **3.** Upon successful submission of bulk creation request, there should be a way to query the status of the submitted request, through either a status page or a link to a csv/sheets link with the created contacts.	Explore if we can modify current experience for new contact creation to support bulk creation, and test message creation as well: https://sandbox-bliss.uberinternal.com/new-contact Choose a trip (optional) Search by order ID or name Completed trips 6/28/20 8:02am ₹815.09 Premier / Bangalore , India 6/23/20 3:58pm ₹378.16 UberGo / Bangalore , India Assign a contact type Search Contact Type Restaurants > Freight Carrier > Freight Shipper > Delivery Partner > New Mobility > Elevate > Phone Support Issues > Driver > Eater > Other > Rider > Compose User message LANGUAGE CHANNEL English Messaging COUNTRY India Type < to see saved replies or write a message here... BACK

2	P0		1. [P0] Text, image background and other styling that is currently #629A41 in Bliss should be changed to #1155cc for Bliss Sandbox contacts. 2. [P0] The Top Left text should be **Bliss Sandbox** instead of **Bliss Contacts** 3. [P0] The top header in Bliss should have a background color #F5D400 4. [P1] The Bliss Otter icon on header right should be changed to a different icon [TBD]