TEAM 1

Challenge Card #1 – System architecture and UX

Problem — what is visible today?
Business employees and finance colleagues need to submit AP or Master Data requests, but they are not always sure which system to use, what information is required, what the SLA means, or how to check the request status. The experience is fragmented across separate tools such as SAP VIM, Concur, e-vouchers and ticketing systems.

Business consequences — why does it matter?
When users are unsure how to act, they submit incomplete or incorrect requests, ask repeated questions and create rework for AP, Master Data and support teams.

Main users affected by the problem

- Business employees
- Local finance colleagues
- Accounting / master data stakeholders

What is expected from the team?
Understand what makes AP and Master Data requests difficult from the user's point of view: choosing the right path, submitting correct data, understanding status and knowing what happens next.

Important KPI for the business
First-time-right request rate — percentage of AP / Master Data requests submitted correctly without rework, correction or rerouting.

Baseline: 62% of AP / Master Data requests are submitted correctly the first time.

Target: 82% submitted correctly the first time — increase by **20 percentage points**, which means a **32% relative improvement**.

Working challenge
How might we improve the AP and Master Data request experience for business employees, local finance colleagues and accounting / master data stakeholders so that they can choose the right process path, submit requests correctly the first time and understand the next steps, while service teams can reduce rework and repeated questions?

Map stakeholders for your challenge

Use your challenge card and list all people or groups connected with the process.

Place them on the map based on:

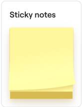
Interest — how much they care about the problem or are affected by it.
Influence — how much they can affect the process, decision or implementation.

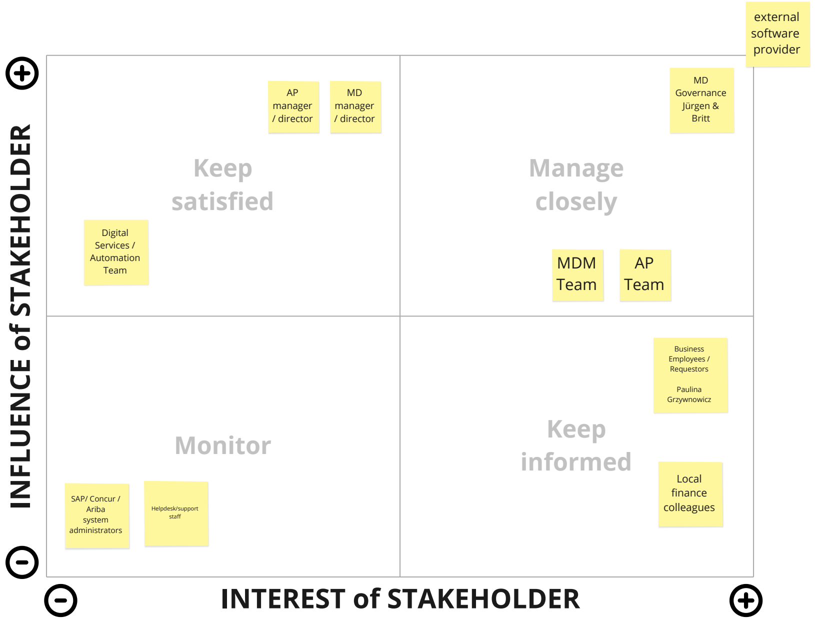
Map four groups:

- **High interest / high influence**
  Key stakeholders. Talk to them early and involve them closely.
- **High interest / low influence**
  Main users or affected groups. Important for empathy interviews.
- **Low interest / high influence**
  Potential blockers or decision-makers. They may not feel the problem, but can stop or enable change.
- **Low interest / low influence**
  People to monitor. They may be less important for interviews now.

Output

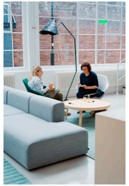
Select **2–3 people or groups** you would interview first in the empathy phase.





TASK – DESIGN AN INTERVIEW

1. Use the stakeholder map from the previous exercise.
2. Choose one group to interview — preferably users.
3. Discuss:
   - What hypotheses do we have about the source of the problem?
   - What do we want to learn?
   - Which questions could reveal valuable and non-obvious information?
   - Which questions will help us learn stories, facts and real experiences?
   - Which question could reveal the "faster horse" — what users think they want?
   - What would be useful to see or experience first-hand?
4. Output: Brainstorm questions, then turn them into one coherent interview guide.

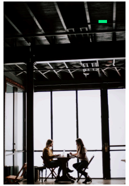


EXAMPLE QUESTIONS

- Tell me about the last situation when...
- What was difficult?
- Why was it difficult?
- How did you feel at that moment?
- How often does this problem happen?
- How do you deal with it today?
- What have you already tried?
- Why was the current solution not good enough?
- How much time or effort does it cost you?
- Where do you look for information or support?
- What keywords would you use to search for this topic?

HOW TO CONDUCT A INTERVIEW?

- Ask open-ended questions.
- Encourage stories.
- Do not suggest the answer in the question.
- Go deeper using the "5 Whys" method.
- Make the interviewee feel comfortable.
- Document answers: recording, notes or an AI note-taker.
- If possible, ask the person to show the problem and its consequences.



Choosing the Interview Group

Go back to the stakeholder map from the previous exercise. Choose one group — preferably users. Note who, why, and how many people.

Business Employees / Requestors

Hypotheses & Goals

Sticky stock

What **hypotheses** do we have about the source of the problem?

What do we want to **learn**?

What would be useful to see or experience **first-hand**?

We assume that the tool is problematic for the users

The tool is not user-friendly and ugly

There is an issue in communication between Data Governance and Users

Better understanding and navigating tools by Requestors

There is not enough training for the users to use the tools effectively

There is an information gap

The process flow is not clearly known

The process is to complicated for the users

There is no single source of truth

Stories & Experiences

'Tell me about the last time...'

Sticky stock

How do you enjoy submitting the tickets?

What did you feel at that moment?

Tell me about the last time you submitted the ticket

What do you like about the process most?

What do you dislike about the process most?

What was difficult?

Tell me a story of your previous experiences with similar ticket submissions

Which tools do you use?

What do you think about the tools?

What do you like / dislike in tools?

Tell me a story about your training on the tools

Non-obvious & Deep

'What if...', 'Why specifically...'

Sticky stock

Why specifically do you feel unsure about what information is required?

How would you submit your tickets without the tools?

What would have made the process clearer or easier for you?

What specifically is the main pain point for you? Where do you stuck during the process?

What if there was an ideal tool - what would be the functionalities?

If you could add/remove something from the process, what would that be?

What if you knew exactly what are the next steps?

What if you could submit tickets with just a few clicks?

'Faster Horse'

What users think they want — vs. what they really need?

Sticky stock

What would make you happy?

What do you want? How would you like to submit tickets?

How would you like the process to look like?

Observation & Experience

What do we want to see live? What will we ask the interviewee to show or demonstrate?

Sticky stock

To see how users are submitting tickets

To see how users use the tools (where they click, what they look for, cannot find)

To take part in training session - to see how they are trained

To see how they are deciding on which tool to use

Check how much time each step takes

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Sticky stack

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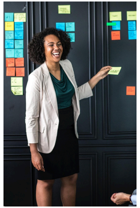
DEFINE: AFFINITY MAP INSTRUCTION

How to create an Affinity Map

1. Each team member reads one sticky note out loud.
2. The team discusses what the note is really about.
3. Place the note next to other notes that feel related.
4. Continue with the next notes and look for natural connections.
5. Create clusters of notes that describe similar problems, needs or situations.
6. When the clusters are visible, give each group a clear name.

Remember:

- Do not create categories too early.
- Let the material speak first.
- Use an "Other" area for notes that do not fit anywhere yet.
- Split groups that become too large.
- Create subgroups if one theme contains different angles.
- Name clusters at the end, not at the beginning.



ANALYSIS AND INTERPRETATION

From clusters to meaning

Affinity mapping is not only about grouping sticky notes. The most important part is interpretation.

For each cluster, ask:

- What do these notes have in common?
- What problem or tension do they reveal?
- What does the user need in this situation?
- What surprised us?
- What is repeated across different interviews?
- How does this connect to our original challenge?

Under each cluster, write:

- the main conclusion
- the user need
- the insight or discovery
- possible implications for the challenge

Category & Conclusion

Process complexity
Need for simplicity the tool

How do you like working with our tool?

Unfortunately, working with the tool is sometimes difficult. The entire process of registering a new supplier — entering the data, waiting for approval, cancelling for internal registration, and completing the form again — is very time-consuming.

What should the ideal process look like in your opinion?

Ideally, it may not be possible, but if MDM could easily send tickets back for correction so they don't have to be created from scratch — because otherwise they get stuck somewhere — that would be great!

The ideal experience would feel like a guided conversation, not like searching through several systems.

I often hesitate because I am afraid my request will be rejected or delayed if I select the wrong category.

The process would be much easier if the system showed missing information before submission, not after review.

I often get stuck at category selection because the names sound internal and I do not know what they mean.

I do not like switching between tools just to complete one business task.

Conclusion: Simplicity needed

Time efficiency
Need of time-saving; shortening the time of submitting request

What do you consider the most difficult?

Maybe not the most difficult, but the most burdensome aspect is the time-consuming nature of the process that I mentioned.

What would make it easier for you to work with our tool?

Shortening the time needed to prepare tickets would make it easier, for example by removing the step of manually selecting internal registration.

When I choose the wrong path, the ticket comes back after two days and I have to start again. That is really frustrating.

Last time I submitted a vendor change request, I spent more time checking the process than filling in the actual data.

Conclusion: Can we shorten the time needed for this?

Can we delete this step? - its from me (mateusz :))

Need for In-Tool Guidance

Did you receive proper training on how to use Level Up?

Yes, I did, and I think I understand the process. The idea of the tool itself and a dedicated team that verifies the data is good.

I usually start by asking someone in finance which tool I should use, because I am never sure if this belongs in SAP VIM, Concur or a ticket.

For requests I submit once every few months, I need guidance inside the tool because I do not remember the process.

I would like to see the next steps in plain language: submitted, under review, waiting for approval, completed.

The training was too general. It showed where to click, but not how to decide which process applies to my case.

Conclusion: How can we make better in-tool guidance?

haw can we make a selfexplanatory tool?

Process complex and Training Clarity

What do you dislike the most about the current process?

The thing I dislike most is that MDM employees cannot send tickets back for correction, so they do not have to be submitted again from scratch. Several times my tickets got stuck somewhere, and additional employees had to intervene.

I usually copy an old request from a colleague because it feels safer than following the official instructions.

I would like one entry point where I answer a few simple questions and the system tells me where to go.

The worst moment is when I submit everything and then receive a reply asking for something I did not know was needed.

I often do not know if I should create a new request, update an existing one or contact AP directly.

Sometimes I have an invoice issue, a vendor issue and a payment question, and I do not know whether these are three tickets or one.

The instructions are there, but they are written from the process perspective, not from my situation.

Conclusion: How can we make the process more transparent?

Lack of Process Transparency & Status Clarity

I get nervous when the request is urgent and I cannot see clearly what happens next.

When the SLA is mentioned, I do not always understand when the clock starts and what I can realistically expect.

Sometimes I submit a ticket and then send an email anyway, just to make sure someone has seen it.

The status is not clear enough. It says open, but I do not know who has it or what they are waiting for.

The hardest part is knowing what information is mandatory before I start. I often discover missing fields only after I submit.

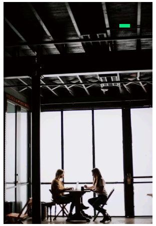
I like when the form gives examples, because then I understand what kind of information is expected.

Conclusion: Users need clear statuses and answers to what is happening

TASK – HOMEWORK FOR EVERYONE

Conduct one simple and short interview.

1. Contact a person from the selected group.
2. Explain that you are participating in a training and need real information for workshop work.
3. You can talk live, meet on Teams, or send the questions by e-mail or chat.
4. Use the questions prepared during the exercise.
5. If possible, ask follow-up questions and capture examples, stories and quotes.
6. Write your answers in Miro using sticky notes. Please use one sticky note for one piece of information. (Tip: You can use Miro's bulk mode to paste table rows and automatically turn them into separate sticky notes.)



CUSTOMER JOURNEY MAP: TASK

Map the current journey connected to your challenge

Work in your team and create a Customer Journey Map for the process your challenge is about.

Steps:

1. Start with the stages of the process.
2. Review the proposed stage names on the board.
3. If you do not agree with them, change the names so they better reflect the real process.
4. Add touchpoints for each stage.
5. Add user actions — what the user is doing.
6. Add pain points — what is difficult, unclear or frustrating.
7. Add insights — what patterns, needs or improvement opportunities you see.
8. Mark the most important moments that should be improved first.

The goal is not to create a perfect map.
The goal is to understand where the experience breaks and where improvement can create the most value.

HOW TO READ THE JOURNEY MAP

Stages
The main steps of the process, for example: Discovery, Request, Approval, Onboarding, Service Usage. They show the journey from the beginning to the end.

Touchpoints
Where and how the user interacts with the service, system, team or communication channel. Examples: email, service portal, meeting, form, internal communication.

Actions
What the user is doing at each stage.
Examples: searching for information, submitting a request, waiting for approval, using the service.

Pain Points
Friction, frustration, confusion, delays or blockers in the user's experience. This is where the process becomes difficult or unclear.

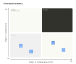
Insights
Patterns, conclusions and improvement opportunities. This row helps us translate observations into decisions about what should be improved.

	1. Discovery	2. Request	Waiting step	Feedback	Ticket resolution
Touchpoints Where and how the customer encounters you at this stage	Internal comms	Correct tool	Tool Email notifications	Tool Email notifications Internal comms	Tool Email notifications
Actions What the customer is actively doing	Choose the correct path of a request → Choose the correct tool Prepare relevant documents	Submits request Attach correct documents	Awaits approval Follow the status of the ticket	Respond to the feedback Approval: Read the email and be happy Re-work: Understand requirements; Provide missing info; Re-send the ticket Rejection: Understand reasons for rejection; In needed - create a new ticket	Follow the status of the ticket Read resolution email
Pain Points Friction, frustration, and blockers in the customer's way	Hard to find correct path Not knowing what documents are needed	Frustration with how much time it takes Hard to find where the tool is → Not knowing how to access the tool Not knowing how to navigate the tool Not knowing which fields/categories to choose	Frustration with how much time it takes Slow approval Not knowing where to check the status Unclear / not-known SLA	Not knowing how to re-send the ticket Confusing re-work with rejection Missing important info and guidance	Not knowing how to re-send the ticket Confusing re-work with rejection Missing important info and guidance Unclear / not-known SLA
Insights Patterns, conclusions, and opportunities to act on	The questions and issues are repeating Needed: Clear, easy guidance on the path and documents Conclusion: How can we make better in-tool guidance?	Simplify request form Checklist for ticket completion Needed guidance on submitting ticket	Conclusion: Can we shorten the time needed for this? Can we delete any steps? Needed: Clear, easy guidance on the ticket status Conclusion: How can we make the process more transparent?	Clear instructions - knowledge base on ShP? Communication: how to make it more clear / more guided / more intuitive?	

Prioritisation Matrix: Instruction

How to work with the matrix

1. Review your needs, problems, insights and key conclusions.
2. Place each sticky note on the matrix:
   - higher = stronger impact on user experience
   - further right = stronger impact on the challenge goal and KPI
3. Discuss differences in the team.
4. Select the items in the top-right area as your priorities.



Prioritising Needs & Insights

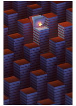
Choose what matters most

Now we prioritise the needs, problems, insights and conclusions that should guide our solution work.

Use the matrix to assess each item from two perspectives:

- **Impact on the user experience**
  How strongly does this need / problem / insight affect the user's experience?
- **Impact on the challenge goal and KPI**
  How strongly does it support the original challenge, business goal and KPI?

Key question:
Which needs or insights, if addressed, would create the biggest positive impact for users and the challenge goal?



Challenge Card #1 – System architecture and UX

Problem — what is visible today?
Business employees and finance colleagues need to submit AP or Master Data requests, but they are not always sure which system to use, what information is required, what the SLA means, or how to check the request status. The experience is fragmented across separate tools such as SAP VIM, Concur, e-vouchers and ticketing systems.

Business consequences — why does it matter?
When users are unsure how to act, they submit incomplete or incorrect requests, ask repeated questions and create rework for AP, Master Data and support teams.

Main users affected by the problem

- Business employees
- Local finance colleagues
- Accounting / master data stakeholders

What is expected from the team?
Understand what makes AP and Master Data requests difficult from the user's point of view: choosing the right path, submitting correct data, understanding status and knowing what happens next.

Important KPI for the business
First-time-right request rate — percentage of AP / Master Data requests submitted correctly without rework, correction or rerouting.

Baseline: 62% of AP / Master Data requests are submitted correctly the first time.

Target: 82% submitted correctly the first time — increase by **20 percentage points**, which means a **32% relative improvement**.

Working challenge
How might we improve the AP and Master Data request experience for business employees, local finance colleagues and accounting / master data stakeholders so that they can choose the right process path, submit requests correctly the first time and understand the next steps, while service teams can reduce rework and repeated questions?

High

Impact on user experience

Low

User value
check business relevance

- Not knowing which fields/categories to choose
- Conclusion: Can we shorten the time needed for this? Can we delete any steps?
- Simplify request form
- Not knowing how to re-send the ticket
- Confusing re-work with rejection
- Communication: how to make it more clear / more guided / more intuitive?
- Not knowing how to navigate the tool
- Frustration with how much time it takes
- Slow approval
- Hard to find correct path
- Not knowing where to check the status
- Not knowing what documents are needed
- Hard to find where the tool is
- Not knowing how to access the tool

Top priorities

Communication flow
Guidance
Clear instructions

- Needed: Clear, easy guidance on the path and documents
- Clear instructions - knowledge base on ShP?
- Conclusion: How can we make better in-tool guidance?
- Needed guidance on submitting ticket
- Conclusion: How can we make the process more transparent?
- Missing important info and guidance

Low priority

- Unclear / not-known SLA
- Needed: Clear, easy guidance on the ticket status

Business value
check user relevance

- Checklist for ticket completion
- The questions and issues are repeating

Impact on challenge goal and KPI

High

HOW MIGH WE...

KPI: requests are submitted correctly the first time reduce rework and repeated questions

How might we guide the users so that they easily submit the tickets correctly the first time while we support the service team to have less rework and repeated questions?

How might we guide the users to have 100% tickets submitted correctly the first time so that the users have clarity and confidence while we support the service team to haveless rework and repeated questions?

How might we increase the number of tickets submitted correctly the first time so that the users have clarity and confidence while we support the service team to have less rework and repeated questions?

How might we improve user's satisfaction scores?

10x recomendation:

How might we design a ticket submission experience that makes it almost impossible to submit an incomplete or incorrect ticket, so most requests can be understood, routed, and processed without manual support intervention?

10x recommendation: think beyond ticket submission

How might we move from users submitting tickets to users being guided to the right outcome automatically, so support is needed only for complex or exceptional cases?

Sticky notes

Task: Create 3 "How Might We...?" Questions

Turn your top priorities into strong design questions

Based on the highest-priority needs, problems, insights or conclusions from your matrix, create **3 How Might We questions** that will guide your ideation.

A strong HMW question should:

- address one of your top priorities
- connect to the original challenge and KPI
- improve the user experience
- support the desired business or service outcome
- be open enough to generate many different ideas
- be ambitious enough to move beyond small improvements

At least one question should be a **difficult, ambitious or 10x question** — one that pushes the team toward breakthrough innovation, a new way of solving the problem and achieving the desired challenge outcome.

How to formulate a strong HMW question

Use this structure

How might we **[action]** for **[user / stakeholder]**, so that they can **[desired user outcome]**, while we support **[challenge goal / KPI / service outcome]**?

Elements:

- **Action:** help, reduce, increase, simplify, encourage, enable, make easier
- **User:** internal client, service user, business partner, team member
- **User outcome:** clarity, confidence, speed, less effort, better decision-making
- **Business / KPI outcome:** fewer escalations, shorter cycle time, better quality, fewer repeated questions, higher satisfaction

Example:
How might we simplify the request process for internal clients, so that they can submit complete requests faster, while the service team reduces rework and clarification loops?

Make it more ambitious: 10x HMW

Do not only ask how to improve. Ask how to rethink.

A standard question often leads to incremental ideas.

A difficult HMW question forces the team to go beyond obvious improvements.

Standard
How might we help new service users understand what to do in the first week, so that they can start using the service confidently and the support team receives fewer basic questions?

More ambitious
How might we make the first week of using the service feel almost self-explanatory, so that new users can complete key actions without needing basic support?

10x
How might we redesign the onboarding experience so that new service **users can achieve their first successful outcome in one day, with almost no effort and no need to contact support?**

RULES FOR IDEATION

1. **We stay committed to our challenge from the previous session**
   Keep your focus on the goal we defined earlier and actively search for answers to the "How might we" challenge from the previous session. Build on yesterday's work, stay engaged, and continue moving forward together.
2. **There are no bad ideas — only brave hypotheses**
   The crazier, more unusual or "impossible" the idea feels, the better. Breakthroughs often start outside the comfort zone.
3. **First generate, then analyse**
   Do not judge, comment on or analyse ideas while we are creating them. Evaluation will come later.
4. **Be specific, not generic**
   If an idea sounds too broad, make it concrete. A good idea should explain what, for whom and how.
5. **Constraints are a starting point, not the end**
   Treat limitations as fuel for creativity. The question is: how might we overcome this barrier?
6. **Look for inspiration everywhere**
   Use examples from other industries, technologies, services, startups and unexpected contexts. Innovation often comes from combining distant worlds.
7. **Speed matters**
   We will work in short rounds and time boxes. Time pressure helps us avoid overthinking and generate more boldly.
8. **Support others and yourself — leave your inner critic outside**
   Encourage each other, build on ideas, and create a safe space for experimentation. Your inner critic can wait outside the door — we will invite it back later, during evaluation.

10X THINKING

Most organizations try to make their products, services or processes **10% better.**

They optimize what already exists.
They improve the current process.
They fix small pain points.

But 10% thinking often keeps us inside the same assumptions.

10x thinking means asking a different question:

Not: "How can we improve this a little?"

But: "How could we make this 10 times better, faster, simpler or more valuable for the user?"

10x ideas may feel unrealistic at first — and that is the point.

They force us to:

- change perspective,
- question current assumptions,
- look beyond existing processes,
- imagine a radically better experience,
- search for new ways to create value.

In this exercise, we will use 10x thinking to push our ideas beyond obvious improvements.

SILENT IDEA GENERATION

Your task: generate as many ideas as possible individually and in silence.

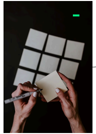
You have **10 minutes.**

Work with your team's **"How might we…" challenge** and follow the ideation rules.

Instructions:

1. **Read your "How might we…" challenge carefully**
   Make sure you understand what problem you are generating ideas for.
2. **Switch off your inner critic**
   Write down every idea that comes to your mind — including ideas that feel strange, unrealistic, too simple or even "stupid".
   At this stage, quantity matters.
3. **Make your ideas specific**
   Do not write only the desired effect.
   For example, "better communication" is not an idea.
   Describe what could actually be done, for whom and how.

After 10 minutes, I will give you additional inspiration to help you push your ideas further.



GROUP BRAINSTORMING

Your task: share your ideas and build on them as a team.

You have **15 minutes.**

This is not a presentation.
This is not a decision-making moment.
This is not a search for approval.

Instructions:

1. **Read your ideas to the group**
   Briefly explain what you wrote, but do not try to defend or "sell" your ideas.
2. **Listen to others with curiosity**
   Do not judge, evaluate or discuss whether the idea is realistic yet.
3. **Build on each other's ideas**
   Use other people's ideas as triggers for new directions.
4. **Generate 10x ideas**
   Ask yourself: What would this idea look like if it was 10 times better, faster, simpler or more valuable for the user, and how could it improve key KPIs by 10x?
5. **Add new ideas to the board**
   Keep writing. Every new idea should become a separate sticky note.

Goal: create more, stronger and bolder ideas than any one person could generate alone.

Copy and paste here your HMW questions

KPI: requests are submitted correctly the first time reduce rework and repeated questions

How might we guide the users so that they easily submit the tickets correctly the first time while we support the service team to have less rework and repeated questions?

How might we increase the number of tickets submitted correctly the first time so that the users have clarity and confidence while we support the service team to have less rework and repeated questions?

How might we guide the users to have 100% tickets submitted correctly the first time so that the users have clarity and confidence while we support the service team to haveless rework and repeated questions?

10x recomendation:

How might we design a ticket submission experience that makes it almost impossible to submit an incomplete or incorrect ticket, so most requests can be understood, routed, and processed without manual support intervention?

10x recommendation: think beyond ticket submission

How might we move from users submitting tickets to users being guided to the right outcome automatically, so support is needed only for complex or exceptional cases?

Sticky stock

Organize regular live training for new joiners/new users of the tool or basically anyone inside the organization. Q&A sessions.

Create monthly sessions for the users - with specific cases to show what was not done correctly, how it should be done, to answer their questions etc.

On the welcome page place visibly the training materials online, the schedule of the upcoming live Q&A Sessions and SLA graphic so the users are aware of waiting time and their ticket status.

Create a funny training (game like - with tasks, points, award - at the end e.g. more points to Cafeteria) for the paths and tools for the users to ensure that everybody knows and remembers how to submit a 'good' ticket

Design a decision tree that would help the users to ensure the correct path and completeness of tickets

before users can submit the ticket short checklist or 1 min reel to ensure they know the rules which they have to complete to go further.

Create an automation that would verify the correctness and completeness of the ticket before submission and give a completeness score (e.g. your request is 60% ready + info what's needed more)

Create a chatbot (AI) which would guide the users through the process and ensure everything needed is provided, and also would automatically create a correct ticket based on input

a chatbot with a knowledge base - to answer all users' questions (instead of service team)

Make ticket submission process in a way that requestors had to work in groups for some time (2-3 people) - to ensure the tickets are submitted correctly -
2 heads are better than 1;)

Ticket simulator to train the users on ticket submitting (in form of a game)

Apply some auto-hint functions to remind the requester there is a wrong input or a wrong role being selected

Redesign the ticketing tool in a way it shows the progress of the request creation, which steps of how many is already filled up with a clear information of what is still missing. Warning info showing up in the center of the screen, not in the bottom or top corner which is frequently ignored.

graphical guiding system which way should the user use like mouse over hints and explanations

Update the ticketing system so that the ticket cannot be submitted in a wrong way (data and field validation; completeness validation) - poka-yoke

progress bar and animation eg confetti so the user knows he did it right way.

Create a more guided ticketing tool - in which the user needs to go through the correct path and provide everything that is needed - so the tool itself guides the user on ticket submission

For every field that needs to be filled up while creating a request add a button with an information of what the field actually mean, why it is obligatory to filled it in, where the information can be found et.

some kind of user rewarding system if they do it proper way eg. after 10 "proper" tickets he gets digital badge and is now super user.

Creating a position of 'Ticketing Master' - local superusers who can support other users in their regions before the service team is included

TASK: ANALYSE IDEAS ON THE MATRIX

Use the idea evaluation matrix on the Miro board.

Place each idea on the matrix according to two criteria:

Vertical axis:
Impact on solving the problem and improving KPIs

Horizontal axis:
Impact on user experience

Instructions:

1. Read all ideas generated by your team.
2. Discuss what each idea could change for the user and for the organization.
3. Place each idea on the matrix.
4. Look for ideas with the strongest combined potential:
   - high impact on the problem and KPIs,
   - high impact on user experience.
5. Select **2 ideas** that your team wants to develop further.

Output:
2 selected ideas with the highest potential for prototyping and testing.

Challenge Card #1 – System architecture and UX

Problem — what is visible today?
Business employees and finance colleagues need to submit AP or Master Data requests, but they are not always sure which system to use, what information is required, what the SLA means, or how to check the request status. The experience is fragmented across separate tools such as SAP VIM, Concur, e-vouchers and ticketing systems.

Business consequences — why does it matter?
When users are unsure how to act, they submit incomplete or incorrect requests, ask repeated questions and create rework for AP, Master Data and support teams.

Main users affected by the problem

- Business employees
- Local finance colleagues
- Accounting / master data stakeholders

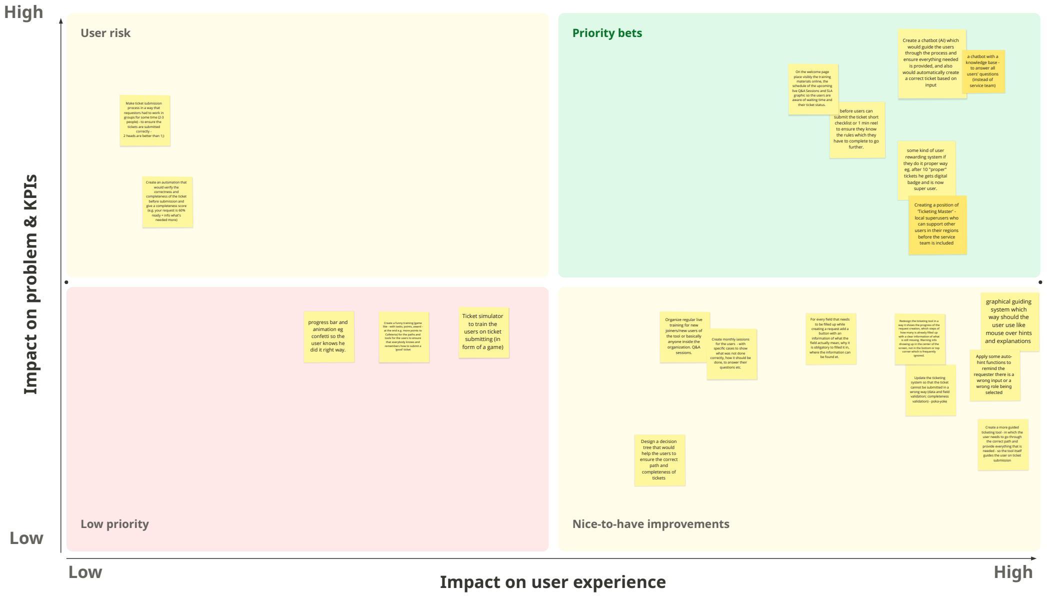
What is expected from the team?
Understand what makes AP and Master Data requests difficult from the user's point of view: choosing the right path, submitting correct data, understanding status and knowing what happens next.

Important KPI for the business
First-time-right request rate — percentage of AP / Master Data requests submitted correctly without rework, correction or rerouting.

Baseline: 62% of AP / Master Data requests are submitted correctly the first time.

Target: 82% submitted correctly the first time — increase by **20 percentage points**, which means a **32% relative improvement**.

Working challenge
How might we improve the AP and Master Data request experience for business employees, local finance colleagues and accounting / master data stakeholders so that they can choose the right process path, submit requests correctly the first time and understand the next steps, while service teams can reduce rework and repeated questions?



TEST YOUR PROTOTYPE

Test your prototype or MVP with a user from another team to check if your Test Card experiment gives useful evidence about your hypothesis.

What to do:

1. Set the context
- Who is the user?
- What problem does the prototype solve?
- What hypothesis and success criteria are you testing?

2. Give a task (don't explain too much)
- Ask the user to complete a realistic scenario
- Let them interact naturally with little guidance

3. Observe carefully
- What is clear vs confusing?
- Where do they hesitate?
- What questions or reactions appear?
- What do they do differently than expected?

4. Ask for feedback
- What worked / didn't work?
- What was unclear or missing?
- What would improve it?
- Did you meet your success criteria?

5. Draw conclusions
- What to keep, improve or change?
- What did you learn about your hypothesis?
- Continue, adjust or stop?

USER: GL/AP/FINANCE colleague

Ariba request being stucked

Chat cannot answer complex queations and does not have information about about multiple tools and business can loose customer/s vendors

You should be able to collect the information at the first time

user should always have a chance to speak with a real person as some people will always prefer a human contact

BOT should provide more detailed quesations

Missing info to be provided

What is annoting that user needs to use multiple tools to give information.

reaction: annoyed, disappointed

chat bot should be able to check live informatio and know all the tool we are using

The presentation is good, training materials. But users like quicker solution

BOT should provide screenshots with the information needed

bot should serve like a single point of source

the solution should be developed in cooperation with other teams

for the first time is fine to have a customer survey satisfaction., After multiple queries it is annoying and maybe one single yes or no question is enogh

Design an experiment for your selected idea

Use the **Test Card** to turn your selected idea into a simple experiment.

Your goal is to decide **which key hypothesis should be tested first** and how you can verify it in the most reliable way during the next session.

Your conditions

- In the next session, you will have:
- 1 hour to build a simple prototype, MVP or test material
- At least 1 tester from another team to test it with

Be creative with the prototype

- Your prototype does not have to be built only in Miro.
- You can use any format that helps you test the hypothesis, for example:
- a clickable mock-up, a process sketch, a simple form, a storyboard, a landing page, a service script, an email/message draft, a dashboard mock-up, a role-play, or even a very simple MVP.
- The prototype only needs to be good enough to help someone react, understand, use or evaluate the idea.

Create a chatbot (AI) which would guide the users through the process and ensure everything needed is provided, and also would automatically create a correct ticket based on input

automatically generate a correctly structured ticket based on the user's input.

the chatbot can support and guide users so that there is less work for the service team (at least 10%) and there are more correctly submitted tickets (10%).

Test Card — Strategyzer

AI Chatbot | Deadline
Assigned to | Duration

STEP 1: HYPOTHESIS
We believe that
the user will be more willing to use the chatbot than to write to the service team (and there will be less direct questions to the team - 80% less).
Critical:

STEP 2: TEST
To verify that, we will
create a 'chatbot' (on designed MS Teams channel) that will be a real person guiding the users.
Test Cost: | Data Reliability:

STEP 3: METRIC
And measure
and observe whether the user understands what to do and say the process feels clear (feedback asked by chatbot at the end of conversation; stats of usage)
how you gather this information? survey, stats inside the tool?
Time Required:

STEP 4: CRITERIA
We are right if
Direct approach to agents will decrease to 20%
how much biger?

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Design an experiment for your selected idea

Complete the Test Card

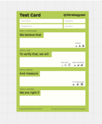
1. We believe that...
Write the most critical hypothesis behind your idea.

2. To verify that, we will...
Describe the smallest prototype, MVP or experiment you can prepare in 1 hour.

3. And measure...
Define what you will observe, ask or count during the test.

4. We are right if...
Define the minimum result that will tell you the idea is worth continuing.

What can we test quickly that will give us the strongest evidence for making a decision?



The experiment is well designed. Before the workshop, check whether you can create and add a **Channel Agent** to MS Teams using your current company permissions and licences. Teams currently supports agents that can answer questions in a channel, but users usually need to invoke the agent, and creating/publishing one may require access to Copilot Studio, appropriate permissions and approval from IT. Human escalation can also be configured, but it is not guaranteed to be available to a regular user. Microsoft: Channel Agent, Microsoft: connecting an agent to Teams.

If this is not possible during the workshop, I recommend running a **Wizard of Oz simulation**:

- Create a dedicated MS Teams channel.
- Ask users to post their questions there.
- A team member copies each question into ChatGPT or another AI tool and posts the generated answer back in Teams.
- If the team member already knows the correct answer, they can respond directly.
- Give users a clear option such as **"I need human support"** to simulate escalation to an employee.
-

Users should not be told who is producing each response during the test. The purpose is to simulate the chatbot experience and observe whether they are willing and able to use this channel instead of contacting the service team directly.

In Step 3, measure:

- the percentage of queries resolved without human escalation,
- the percentage requiring human support,
- the number of direct contacts with service agents,
- user satisfaction and perceived clarity after the conversation.

Option 1: Channel Agent
A Channel Agent can be created directly inside a Teams channel.

Users ask questions by mentioning it:
@HR Support How can I submit a request to change an employee's personal data?
The agent can use information from:
- messages posted in its channel,
- meeting transcripts and approved summaries,
- the channel's Planner board,
- web search, if enabled by the organization.

To add it:
1. Open the relevant Teams channel.
2. Select **Open agents and bots**.
3. Find **Channel Agent** and select **Add**.
4. Users can then ask questions by @mentioning the agent.

Channel Agent is currently in public preview. To create and interact with it, users need a Microsoft 365 Copilot subscription, membership in the relevant channel and access enabled by the IT administrator. It cannot answer questions in conversations containing external users. Microsoft: Channel Agent requirements

Option 2: Custom agent for the experiment
For this experiment, a custom agent may be more suitable. You could create it in SharePoint or Copilot Studio and provide it with:
- a specific role and instructions,
- HR procedures and supporting materials,
- examples of typical requests,
- a structured process for guiding requesters,
- rules defining when human support is required.

The agent can then be added to the selected Teams channel. Users interact with it by writing, for example:
@HR Request Assistant I need to change my bank account details. What should I do?
Microsoft supports adding custom SharePoint agents to Teams channels and using them through @mentions. The agent only uses information that the individual user is permitted to access. Microsoft: Share a SharePoint agent in Teams

Recommended test setup
- Teams channel: **HR Request Support**
- Custom agent with instructions and relevant HR knowledge
- Requester asks a question using @HR Request Assistant
- Agent guides the requester toward resolving the issue
- The requester can select or write **"I need human support"**
- The team measures completion time and the number of human interventions

One important limitation: standard Teams agents normally respond only when explicitly @mentioned. If the agent needs to monitor every channel message and respond automatically, a more technical custom Teams bot, appropriate message permissions and probably IT involvement would be required.

For the workshop, I would still prepare the **Wizard of Oz simulation as a backup**, because access to agent creation may be restricted by TÜV's licences or IT policies.