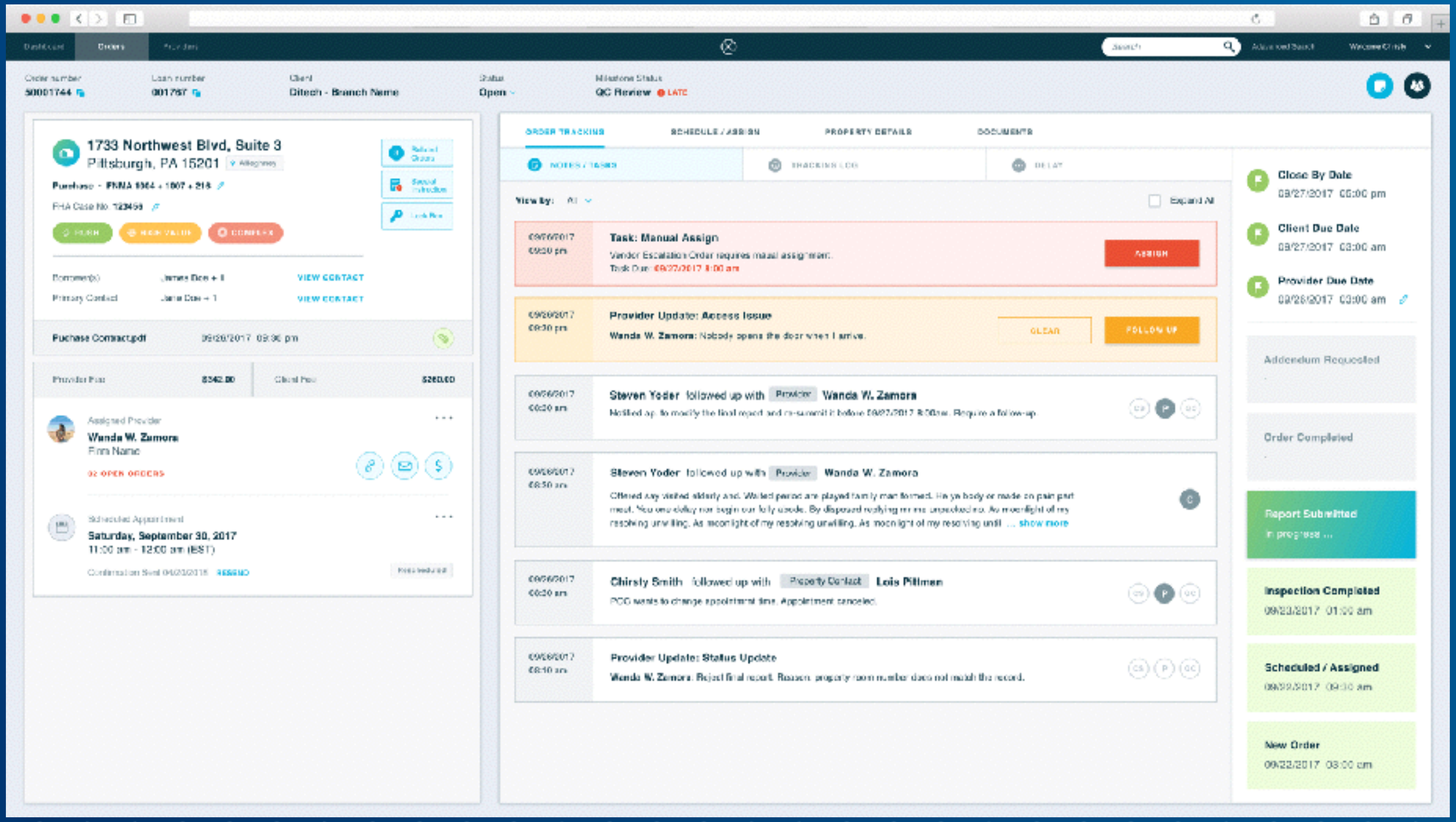


EXOS Enterprise - Valuation Order Management

User Study Result Summary

Why?

Understand how users interact with the new Order Management platform, collect and analyze feedback, and define UX problems.

How?

45min per session (2 in-person + 4 on-line)

Who?

Base Easy Scheduling (1)

Trainee Easy Scheduling + Troubleshooting (1)

Escalate Order Management (1)

Supervisors and Managers (3)

Personas

<table>
<tr><th>Role</th><th>Tasks</th><th>Features Using</th><th>Workflow</th></tr>
<tr><td>Based Easy Scheduling</td><td>• Easy Scheduling
• Vendor Availability Escalation</td><td rowspan="5">Dashboard
Order Details / Notes
Schedule / Assign
Documents
Property Details
Provider Configuration
Order Search</td><td rowspan="3">Get Next:
1. Read “Special Instructions”
2. Find the right property contact (Document - Contract)
3. Define whether it is a complex order (Property Details)
4. Understand what has happened (Notes)
5. Call property contact to schedule
6. Send schedule confirmation (if succeed)
7. Call every 3 hours (if failed)</td></tr>
<tr><td>Trainee - Easy Scheduling + Troubleshooting</td><td>• Easy Scheduling
• Vendor Decline
• EXOS One Email Box</td></tr>
<tr><td>Supervisor - Scheduling</td><td>• Order Escalation
• Resolve Questions and Complains</td></tr>
<tr><td>Escalate Order Management</td><td>• Vendor Follow Up
• Manual Assignment
• Vendor Alerts
• Vendor Configuration (Limited Control)</td><td rowspan="2">Out of “Get Next”:
1. Resolve “Vendor Alerts”
2. Check EXOS One email box, reply, and paste to notes

Get Next:
1. Order Assignment (Pending Assignment)
2. Vendor Follow-up (Order Pipeline)</td></tr>
<tr><td>Supervisor - Order Management</td><td>• Order Escalation</td></tr>
</table>

Overview

Rethink the Dashboards

Cross-Product Development Strategy

Balance Automation and User Control

Improve Data Accuracy

Establish a Feedback Loop

Establish a Feedback Loop

- How do we effectively gather feedback after product release?
- Problem reporting, tracking, and prioritizing (Business to IT, IT Internal)
- Currently, users report bugs via email
- IT backlog the issues and Business prioritize them
- Can we utilize WalkMe for feedback gathering?

Discover Defects with Users and Follow Up

Feature	User Experience Issues (Learned from the Valuation OM Team)	Is this a known issue? A bug or a new requirement? (Verified with the Product Team)
Dashboard - Get Next	Vendor Alerts(Updates) are not in the "Get Next" Logic.	Yes, we know this. This is how it was implemented.
Dashboard - WIP	The WIP doesn't update at the real-time	The list refreshes every 5min. Real-time updating is not achievable.
	New orders show up in the middle of the WIP	This could happen. It depends on the bucket. This is how it was designed.
Order Escalation	Order Escalation(Request Assistance) doesn't work as expected so they use emails instead.	The users may not configure the task correctly. It's working when we test it. We need to follow up and see examples.
Notes	One provider alert generates 2 notes: one when they receive it, and another one when they clear it. It is confusing.	This was the requirement.
	Some notes have the wrong format, everything becomes one paragraph. (Are they require to format the email manually when its copied to notes?)	Yes. We have received the request. This is an HTML formatting issue.
	It is hard to filter the notes. (The filter feature was in the design mockup but wasn't implemented.)	Notes filters were not implemented.
Search	The global search takes forever and doesn't return the result.	Yes. There are 4 attributes they can search for: loan number, work order id, order number, and borrower name. We need both engineers and the database team working together to fix it. The effort hasn't been planned yet. This applies to all the LOBs - nobody can use global search right now.
	Advanced Search: After entering the order number, you must enter 2 "space" to enable the search button.	No, we cannot reproduce this. No matter what we put in those fields (Work Order ID, Order Number), it accepts it and activates the "Search" button. We need more information from the business.
Vendor Follow Up	When close the panel, the displayed order should be the selected one instead of the original. It also applies to Related Orders.	This is how it was implemented. We will need to follow up with the business to understand whether they actually need this feature.
	Not able to select and copy order#	We will fix it. But it is not a high priority.
Documents	Email Documents feature is not working.	It should already be resolved. (Double-check)
	The document clip button's interactive area is too small.	No, but it should be a quick HTML/CSS fix.
	A document can have 10+ duplicates. (Not sure if it's a bug or vendor's fault.)	No, we think this is caused by the vendor's mistake.
	The "add document" button disappears for some orders.	This feature is temporarily disabled for BoA.
Special Instructions	Sometimes the Special Instruction shows "refer to eLS". It takes 5mins to load eLS. (Why "refer to eLS"?)	It is made for BoA. (Once the security project is done, we will retire eLS.)
Report	In EXOS, there's no clear indication when a new report is generated. (The feature was included in the design mockup, wasn't it implemented?)	There's a milestone status named "report submitted" so it should be clear. We didn't implement the "quick access to the report". We need to understand why they need access. (The QC workflow will kick off once the report is submitted. Unless the QC rejects the report, then the order will back to the queue.)
Delay	The order is still on delay but notes show it's taken off.	No. This is how it was designed. The notes are added by the users, so they can control what to include in the notes.
Related Orders	The "related orders" view should be a slide-out instead of a pop-up according to the design. Why did we change to a pop-up?	This has been fixed with the new release.
Appointment Confirmation	When sending confirmation to the property contact, the appraiser's name is automatically copied to the email, but not to the SMS.	This is a functional enhancement.

Color Code
We believe this has been resolved.
We will fix it but it is not prioritized.
This is how it was designed/implemented. If business wants to change it, this will be considered as a feature enhancement or change request.
We will need to follow up with the business to know more about the issue. We are not aware of that.
We don't think it is achievable from the technical perspective.

We documented all the UX related issue, went through them with product managers, and further categorized into five categories:

- Already fixed
- Known but not prioritized
- New requirement / enhancement
- Need more clarifications
- Not achievable

UX Issues with PM Comments 20200608.xlsx

Rethink the Dashboards

- Differentiate manager users and associate users’ needs
- Differentiate Order Pipeline Management and Order Execution Performance
- Improve the flexibility of “Get Next” Logic

Managers Feedback

Graphs

- Nobody uses the Management Dashboard (x3)
- Expect to use the graphs as filters (x1)
- Expect to view team members' performance and who works on what (x1)
- Expect insights and alerts (x1)

Get Next & WIP

- "Get Next" doesn't avoid cherry-picking (x2)
- Supervisors only get Escalated orders in their "Get Next" (x2)

*** Vendor Alerts and Escalation are not included in the Get Next Logic**

Associates Feedback

Filters

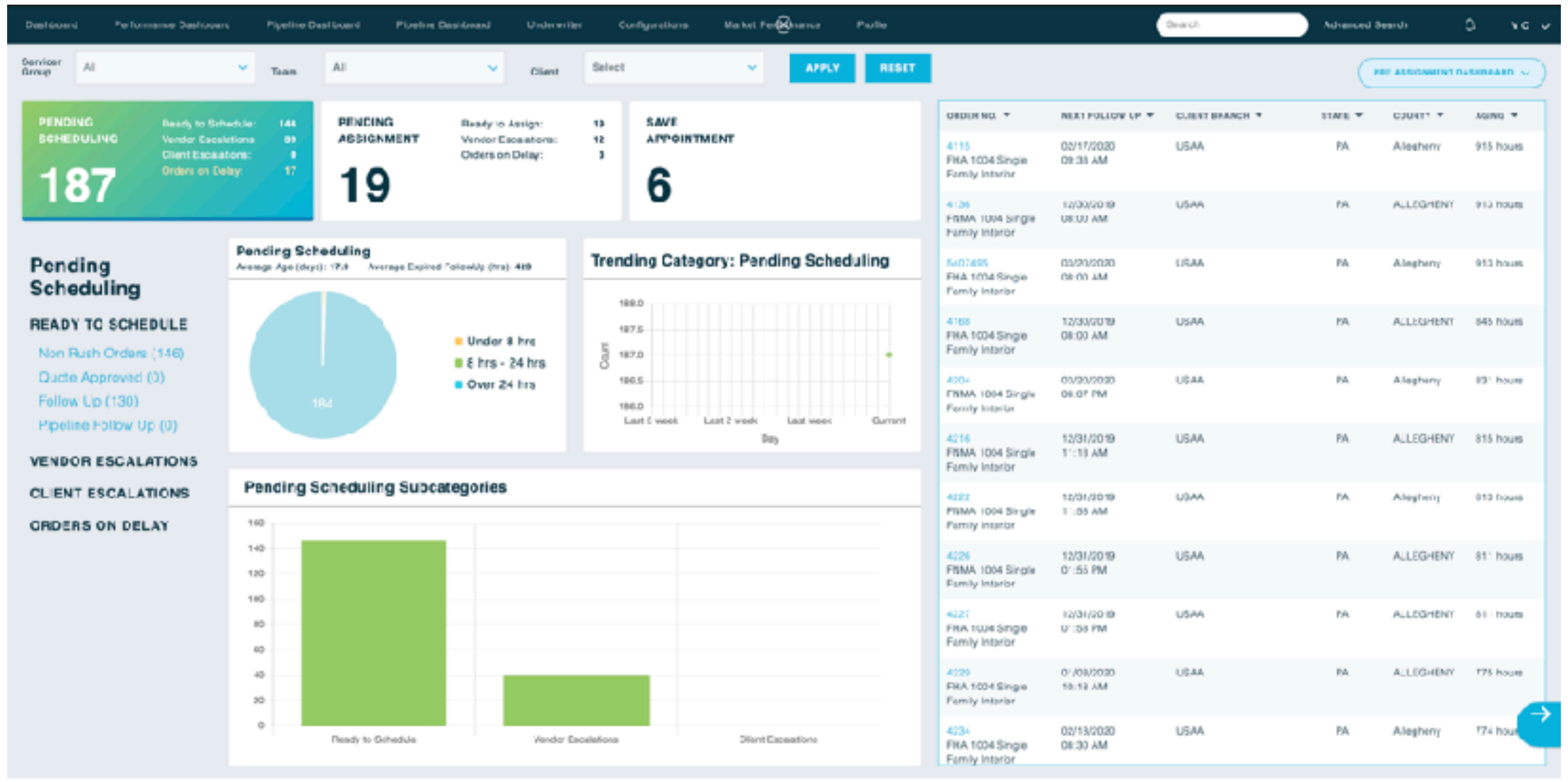
- Filters are not frequently used. (Never x3 / Sometimes x1)

Graphs

- Trending Category Graph and Subcategories Graph aren't useful (x3)
- Don't know how to utilize the graphs (x2)

Get Next & WIP

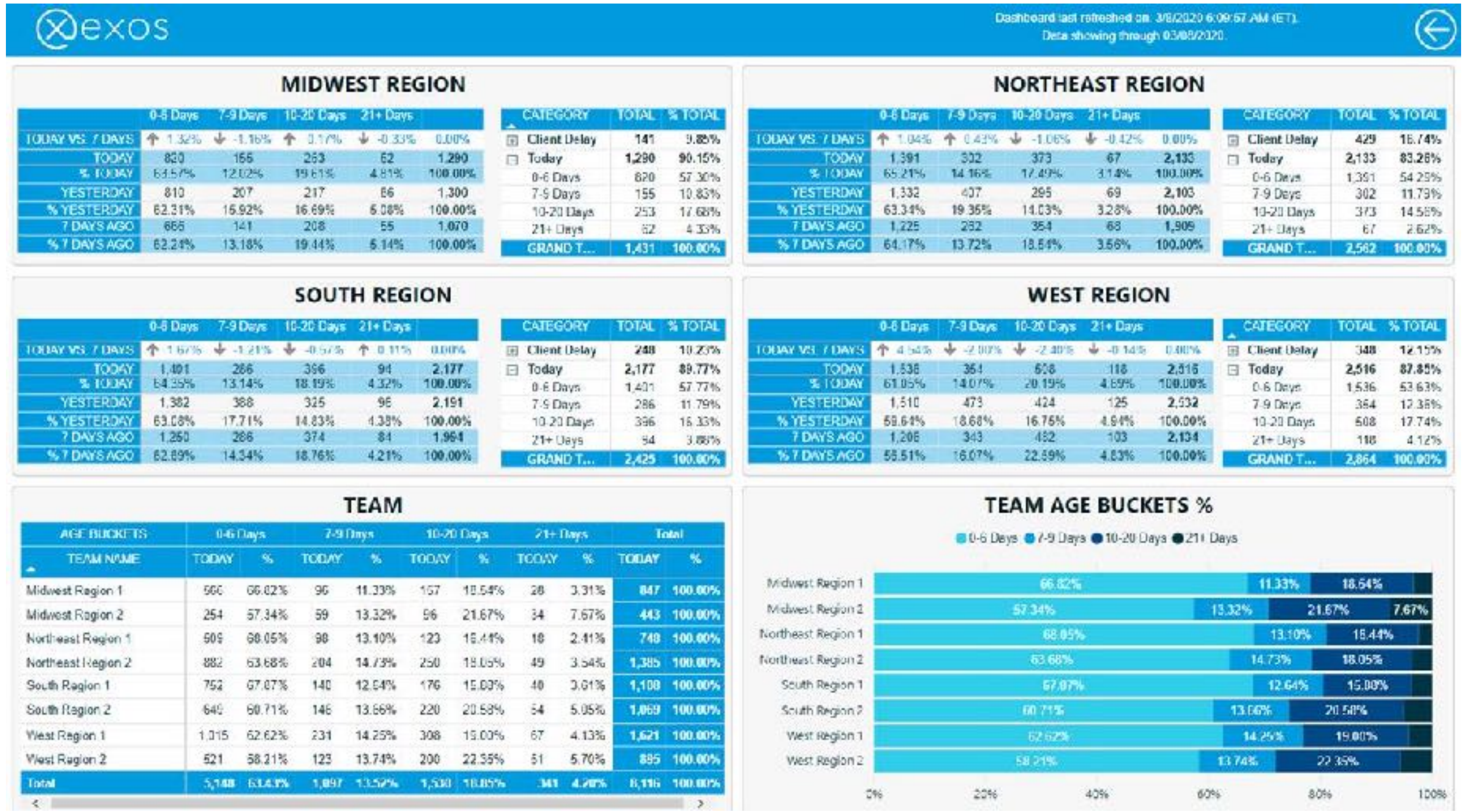
- The WIP doesn't remember the scroll position (x2)

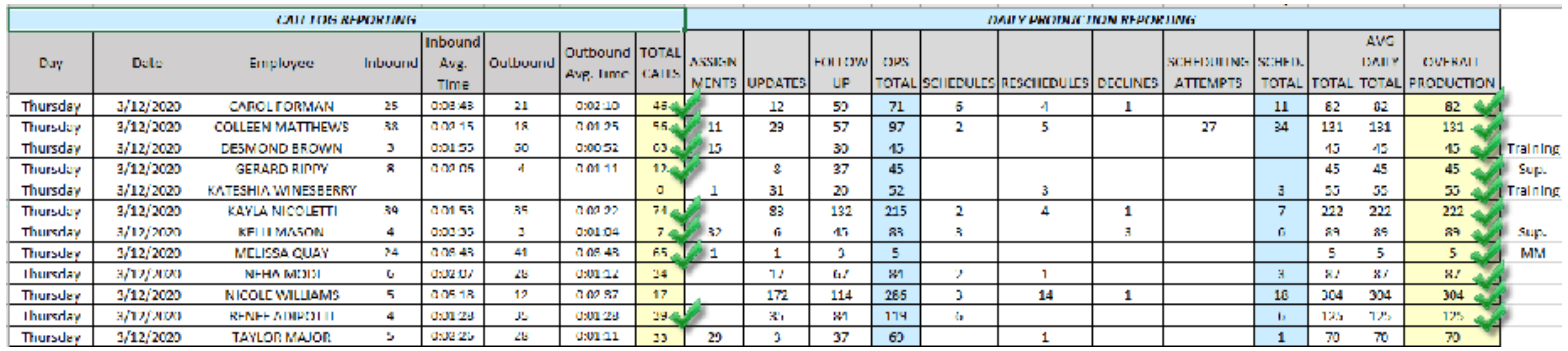


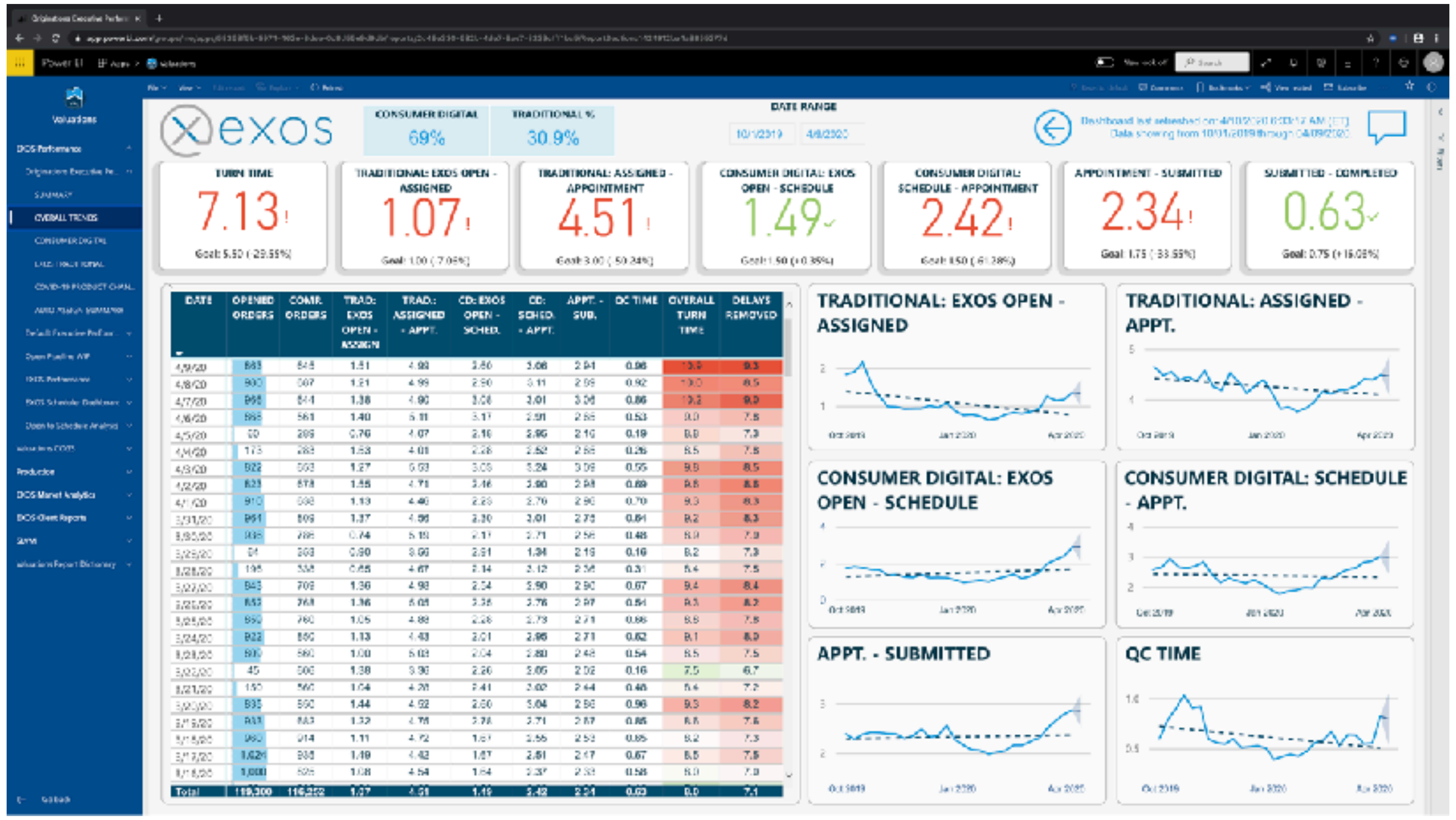
Performance Reporting

Should we embed **Performance Reporting** into EXOS OM so that managers don't need to manually send emails with screenshots every day?

How can we utilize **PowerBI**'s data analytics to help order management decision making?



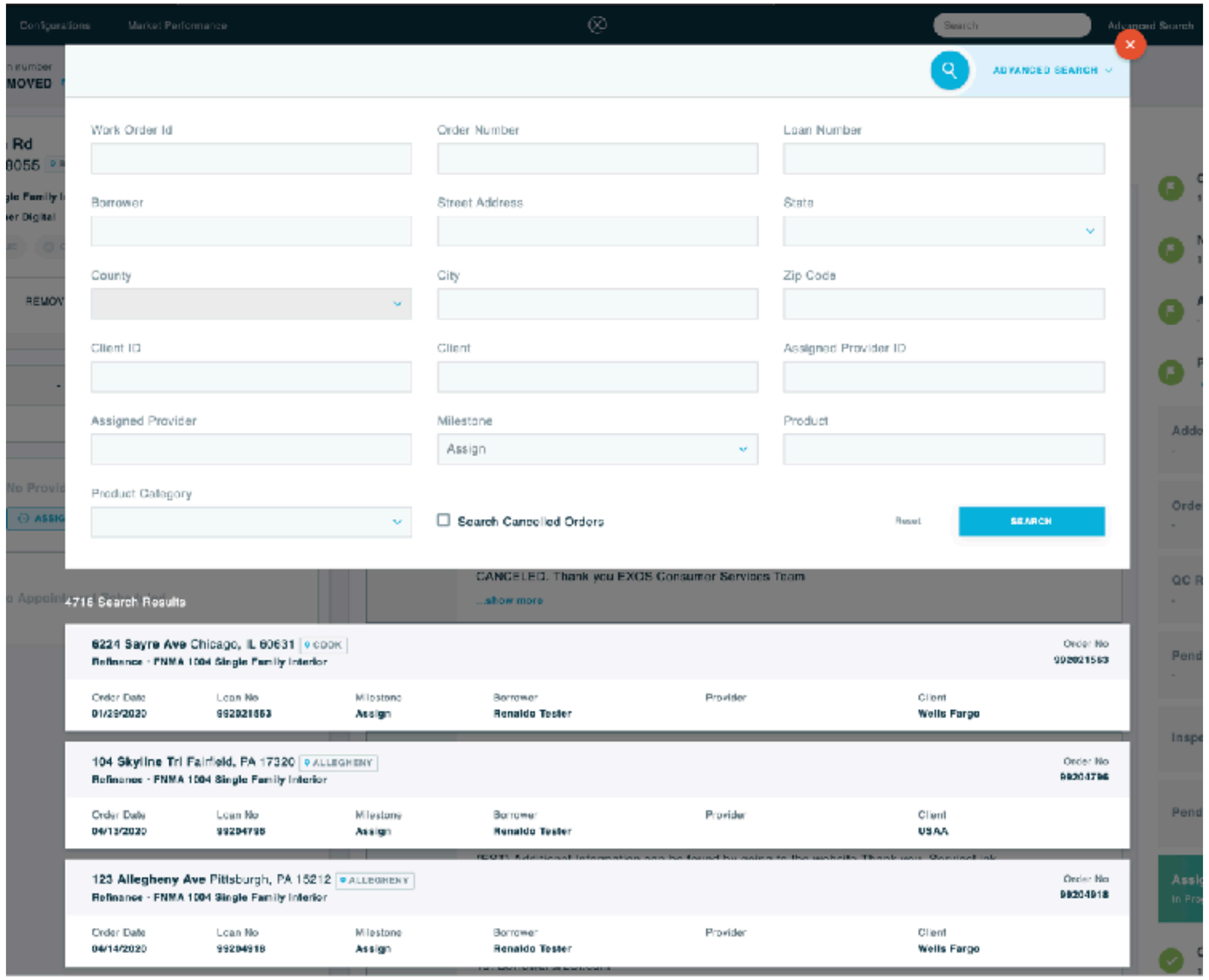




Cross-Product Development Strategy

- Manage all the enterprise products and LOBs as a whole
- Develop a mechanism to release new features across products
- Global Search

Search



Advanced Search

Global Search

FEEDBACK

- **Always keep 2 windows open** - one is the order view, and another is the order search view. (x3)
- **Global search isn't working for Valuation**. It takes forever. (Global works for Title. In Title, it only allows users to search for the order number; in Valuation, the requirement was searching 4 attributes - loan number, work order id, order number, and borrower name.)
- Can we **search order by its phone number**? It will be much easier than searching by property address.

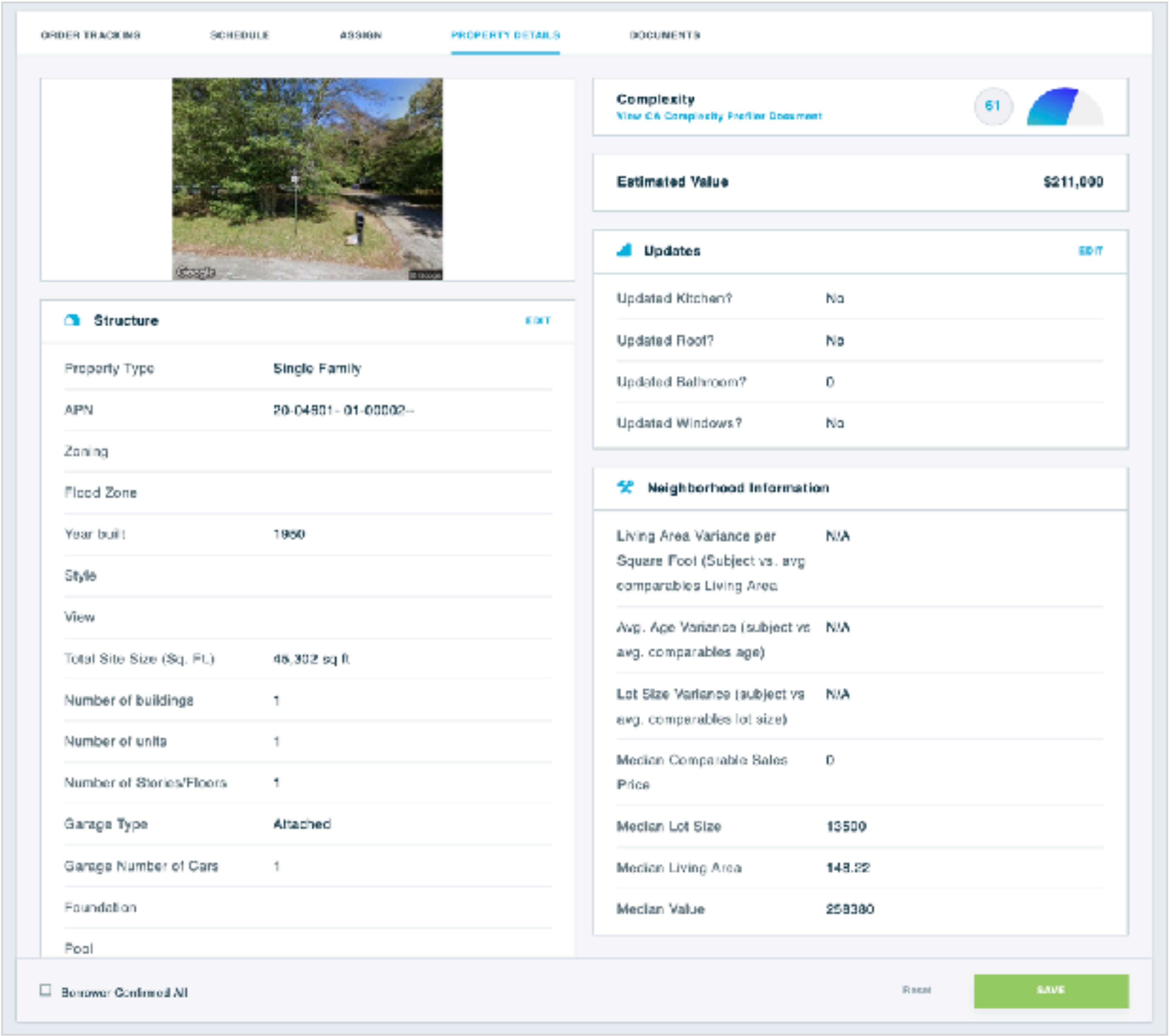
OUR THOUGHTS

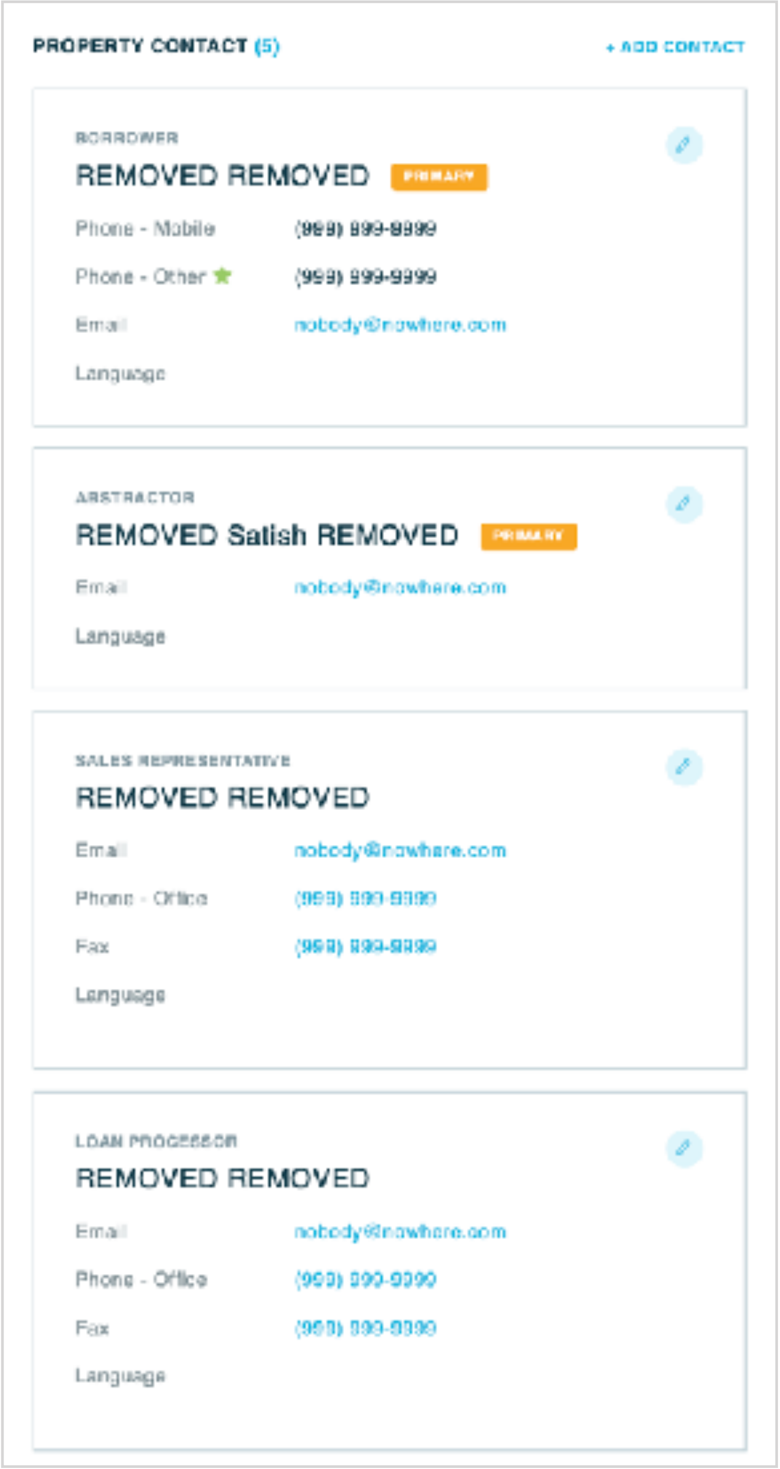
- How can we help users quickly find the orders when they **get inbound calls**?
- How do we keep the **global search** alive given the technical limitation?
- Is it possible to **automatically search** order or vendor name based on the phone number?

Improve Data Accuracy

- How to bring the data up-to-date so that the users don’t need to rely on other data sources?

Data Accuracy





Property Details

- Use **Google and Zillow** to find the property information because property detail data in EXOS isn't always accurate. (x3)
- Look for fee **interior sq. footage** and whether it is in a **water area**.

Property Contacts

- Read the **Contract Addendum** to find the property contact because the property contact in EXOS isn't always accurate.

*Property Data =

AVM (Automated Valuation Model) +

Public Data Local MLS (Multiple Listing Service) +

Realtors fill-out Info

OUR THOUGHTS

What's the inaccurate rate?

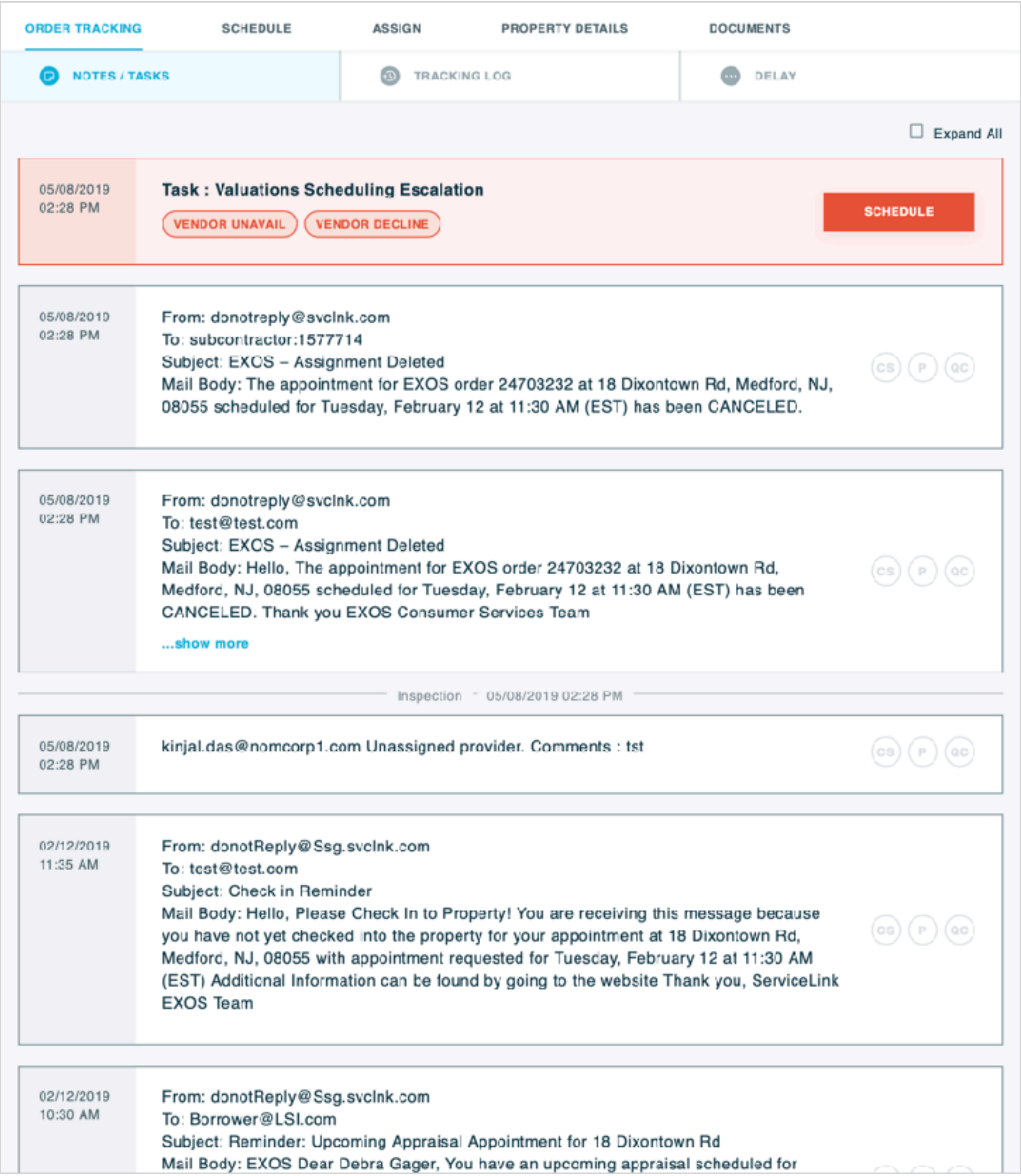
What caused the inaccuracy?

Can we extract the contacts from the Contract Addendum?

Balance Automation and User Control

- Automation brings efficiency
- Some users miss the eLS as it offers more data points and user control

Communication - Notes



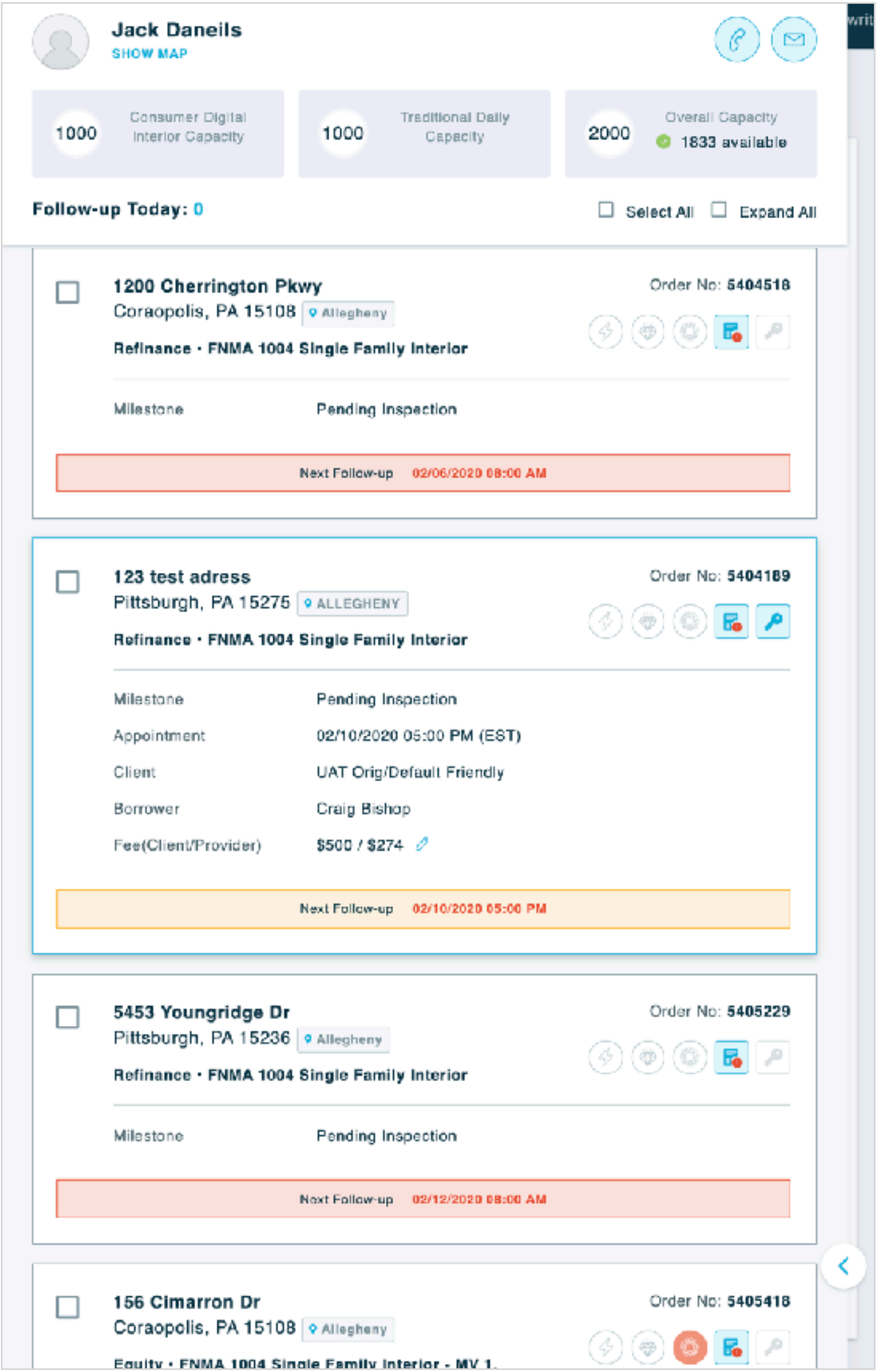
FEEDBACK

- It is **hard to filter** the notes. eLS displays notes in a table so that it's easier to filter and locate notes. Ex: sort the notes according to the assigned provider. (x2) *(* The filter was in the original design but wasn't implemented.)*
- When copy and paste an email, sometimes the **content exceeds the character limit** and is cut off.
- eLS allows "**quick comments**" which can be seen from the WIP.

OUR THOUGHTS

- Improve **search-ability** and **readability**?
- Avoid **pasting long paragraphs** into notes without proper formatting?
- What do people write in the "quick comments"?

Vendor Follow Up and Miscellaneous



FEEDBACK

- Hard to match the selected order with the notes. / When switching to a different order, the notes don't update.
- Like the idea of color-coding the next follow-up time. *(* Are the colors correctly implemented?)*
- The special instruction icon on the provider follow up panel is not interactive.

- **Vendor Portal**: Need ***training material*** to help internal users understand Vendor Portal so that they can better help appraisers via the phone.
- **Quote / Email**: When obtaining a quote via emails, they need to ***copy and paste the same content and send 3 emails***. Can we make it more efficient?
- **Fees**: ***have to remember to click on the "+" or "-" button*** when they make a change. Otherwise even the user clicks "save", the changes will be lost.
- **eLS and EXOS Syncing**: sometimes order number, documents, and address are not synced up between the two platforms
- **General**: Text size and interactive elements are ***too small*** / ***Time-out too fast*** *(*bathroom pause?)*

Insights Summary

Rethink the Dashboards

- Differentiate manager users and associate users' needs
- Differentiate Order Pipeline Management and Order Execution Performance
- Improve the flexibility of "Get Next" Logic

Cross-Product Development Strategy

- If a new feature or a change impacts multiple products, how do we communicate, develop, and release? ex. Global Search
- Manage all the enterprise products and LOBs as a whole
- Develop a mechanism to leverage and release new features across products

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