CASE STUDY · BEANFIELD METROCONNECT · 2018

Scheduling & Dispatch Application

An internal web app that lets residential customers book their own installation slot, and gives Operations one place to schedule, dispatch and staff it.

Product UX/UI Designer: Solida Sar

COVERED SECTIONS

1. First, what is Beanfield?
2. Application brief
3. Old vs. new ordering process
4. How appointments reach the app
5. Design process and stages
6. Design iterations
7. User application flow
8. Application screen flow
9. Resulting outcomes

01 · CONTEXT

First, what is Beanfield?

Fibre-optic Internet & TV

Serving Toronto, and now expanded to Montreal.

Two customer types

Residential and Business. This project started with Residential.

Simpler residential plans

Three unlimited, symmetrical Internet tiers became 1 Gbps for everyone at $50/month. Plus Basic or Essential TV and Standard or Premium Home Phone.

Its own network

Independent infrastructure, with no piggybacking on Bell or Rogers.

THE PROBLEM

As the new Residential website grew online orders, Beanfield needed an easier way to handle installation appointments, for Beanfield and for the customer.

The brief

OBJECTIVE · WHAT?

Design a new application that schedules residential customer appointments conveniently and painlessly.

AUDIENCE · WHO?

Internal use by three roles: Scheduling Coordinator, Crew Installation Member and Crew Installation Supervisor.

MAIN STAKEHOLDERS

CEO/CTO, Operations, Customer Service, and the Scheduling and Installation team.

WHY BUILD IT?

Appointments were tracked in an Excel sheet, with the Scheduling Coordinator emailing or calling each customer to arrange on-site visits.

Success, outcomes and challenges

How we measure success

Main KPI: more online orders, now that booking is a step in Online Ordering.

- More successful customer installations
- Fewer on-site incident reports

Desired outcomes

- Customers choose their own preferred date and time, ending the back-and-forth with the Scheduling Coordinator.
- Operations gets a more effective scheduling and installation workflow.

Challenges

- Departments disagreed on which information mattered most in the first iteration.
- Business Services wanted the app too, but the MVP focused on Residential first.

Old process vs. new process

Customer step | Coordinator step

Old · 6 steps, mostly by email

Orders Internet, TV or Home Phone online → Coordinator emails the customer → Coordinator proposes open slots → Customer confirms a slot → Coordinator emails the Service Agreement → Customer confirms. Appointment set

New · 4 steps, customer books the slot

Orders Internet, TV or Home Phone online → **Picks an open date and time slot** → Coordinator emails the Service Agreement → Customer confirms. Appointment set

Some customers still phone in to order. That still works, but Customer Service suggests Online Ordering, and Jira tickets still feed into the app.

How appointments reach the app

1. Residential website

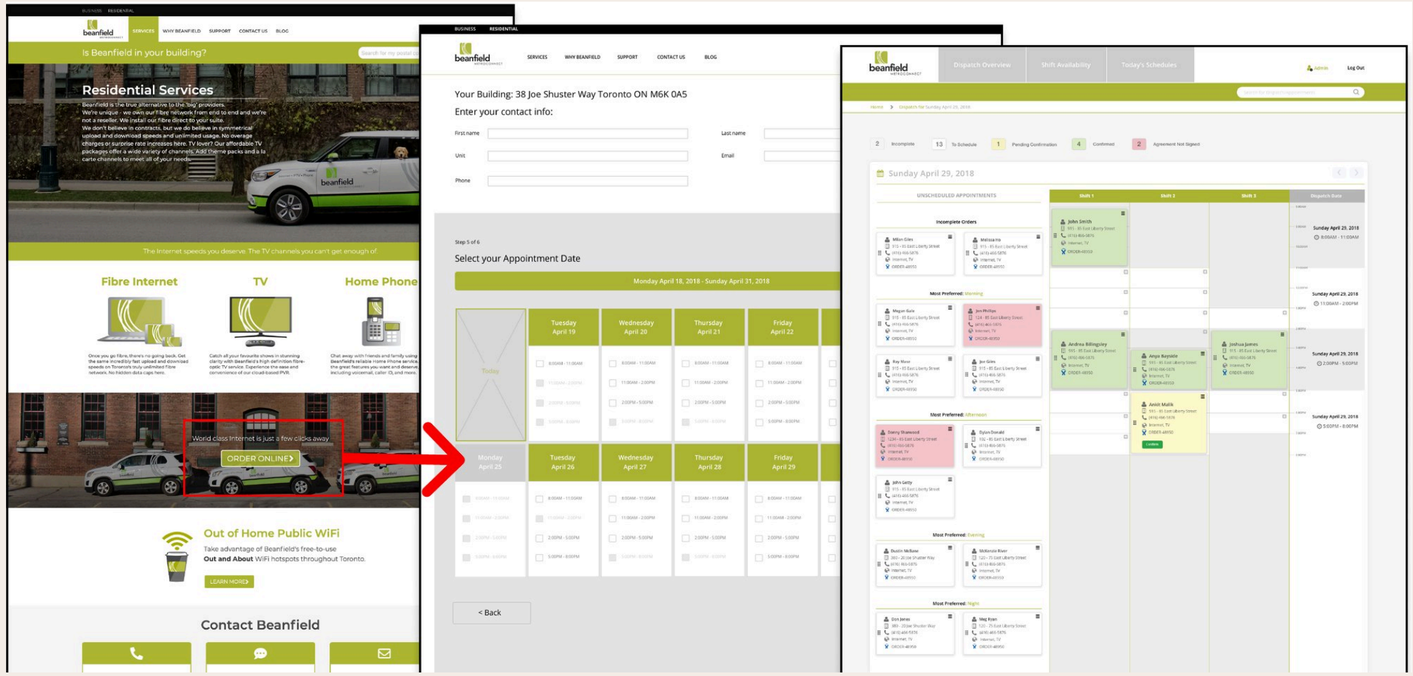
A customer visits Beanfield's Residential website to order services.

2. Online ordering

A 6-step flow: choose Internet, TV or Home Phone, then an appointment date and time slot.

3. Scheduling & Dispatch

The slot lands in the app, where the Scheduling Coordinator assigns and confirms it with a crew.



Design process and stages

01

Design kickoff

Met the CEO/CTO and Operations to set project expectations and walk through the current appointment workflow.

02

Information architecture

Whiteboarded the information and data structure with the Project Manager and Scheduling Coordinator.

03

Design session

Worked through the application design flow with the Project Manager.

04

Prototyping & components

Designed and prototyped in Sketch and InVision, built on Google Material Design and Beanfield's UI library.

05

Demo & feedback

Demoed a working InVision prototype, then held weekly feedback sessions with stakeholders and developers.

06

Design handoff

Handed the final design prototype to developers through InVision.

Planned in three iterations

ITERATION 1 · MVP

Residential launch

1. Drag-and-drop appointment scheduling
2. Blocking off time
3. Cancelling an appointment
4. Rescheduling an appointment
5. Shift management
6. Crew status: In Progress, Incomplete or Finished

ITERATION 2

Learn and extend

New features based on feedback from the first launch, such as:

- A comment field for crews on incomplete appointments
- Custom shift names
- Less reliance on Jira

ITERATION 3

Business customers

Once the Business website launches, business orders flow into the app too. Business ordering works differently from residential, so it gets its own design pass.

Three users, three flows

Scheduling Coordinator
Schedules appointments

Logs in to the Dispatch Overview → Schedules the day's appointments → Sends the Service Agreement → Confirms once the customer agrees

Crew Installation Member
Goes on-site to the customer

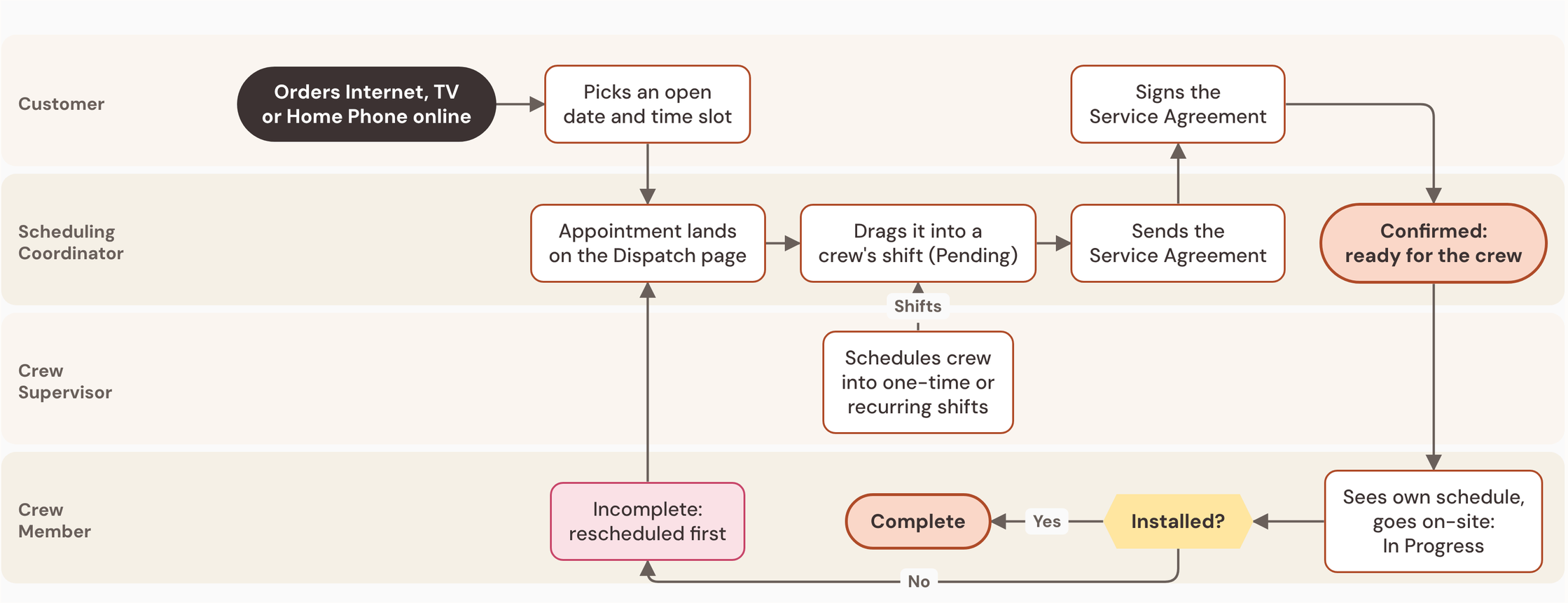
Logs in to see today's appointments → Goes on-site to the customer → Updates status: In Progress, Finished or Incomplete

Crew Installation Supervisor
Oversees the day, assigns shifts

Logs in to see today's appointments → Checks appointments are on schedule → Schedules crew members into shifts

07 · USER FLOW

One appointment, across four roles



08 · APPLICATION SCREEN FLOW

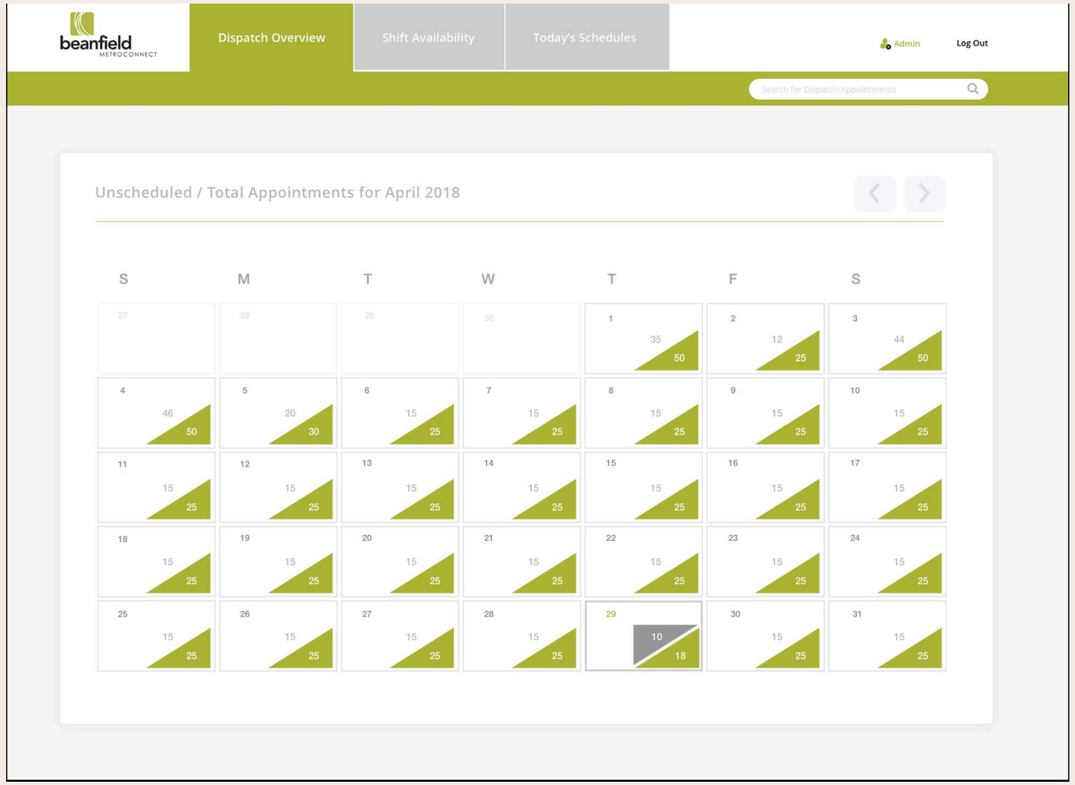
Eight screens, three roles

From the monthly dispatch calendar to each crew member’s live schedule. Every screen is tagged with the role that uses it.

Scheduling Coordinator | Crew Installation Supervisor | Crew Installation Member

SCREEN 01 · DISPATCH

Dispatch Overview



WHO USES IT

- Scheduling Coordinator
- Crew Installation Supervisor

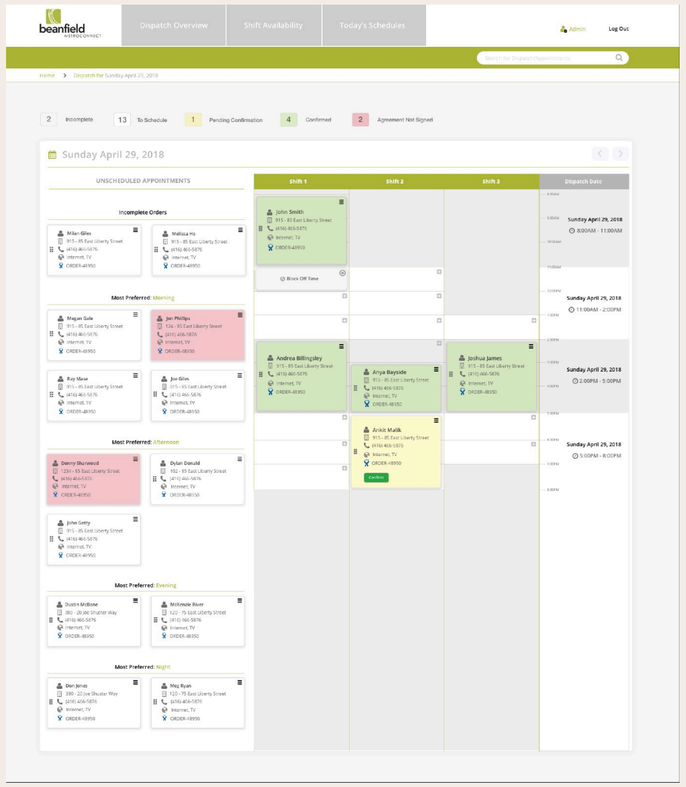
KEY FUNCTIONALITY

- Each day shows two numbers: appointments still to schedule vs. the day's total.
- Only the Coordinator and Supervisor can open this section.
- Clicking a day before today opens that day's Dispatch page.

SCREEN 02 · DISPATCH

Dispatch page

Scheduling Coordinator only



HOW IT WORKS

- The Coordinator makes sure every appointment that day gets scheduled.
- Drag and drop cards into a crew's shift.
- **Block off time** to hide it from step 5 of Online Ordering, giving crews a lunch break or travel time.

CARD COLOURS

Green · Confirmed: Service Agreement signed

Yellow · Pending: waiting for the signature

Red · Not confirmed: not signed, so it can't go to a crew yet

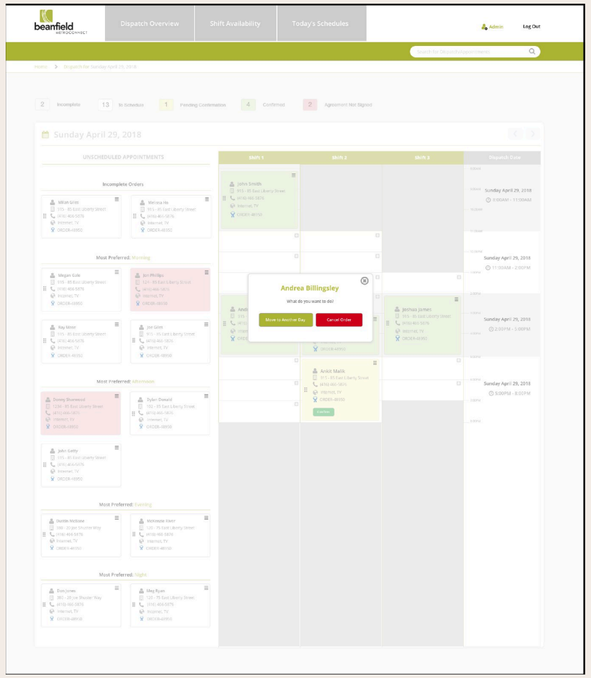
DAILY STATS

1. Incomplete, to reschedule first
2. Still to schedule
3. Pending confirmation
4. Confirmed
5. Agreement not signed

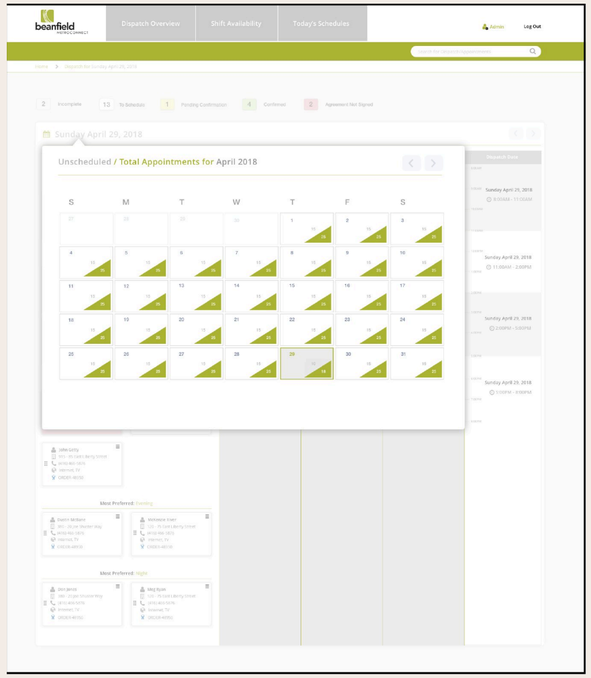
SCREEN 02 · DISPATCH

Dispatch page actions

Scheduling Coordinator only



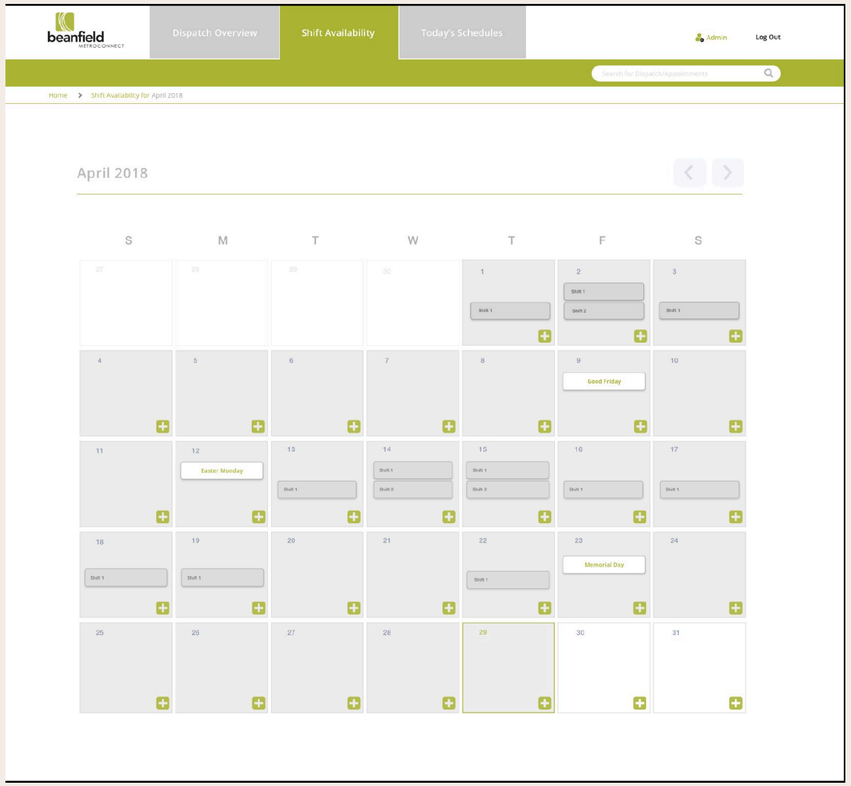
Rescheduling or cancelling an appointment



Switching to another day

SCREEN 03 · SHIFTS

Shift Management



WHO USES IT

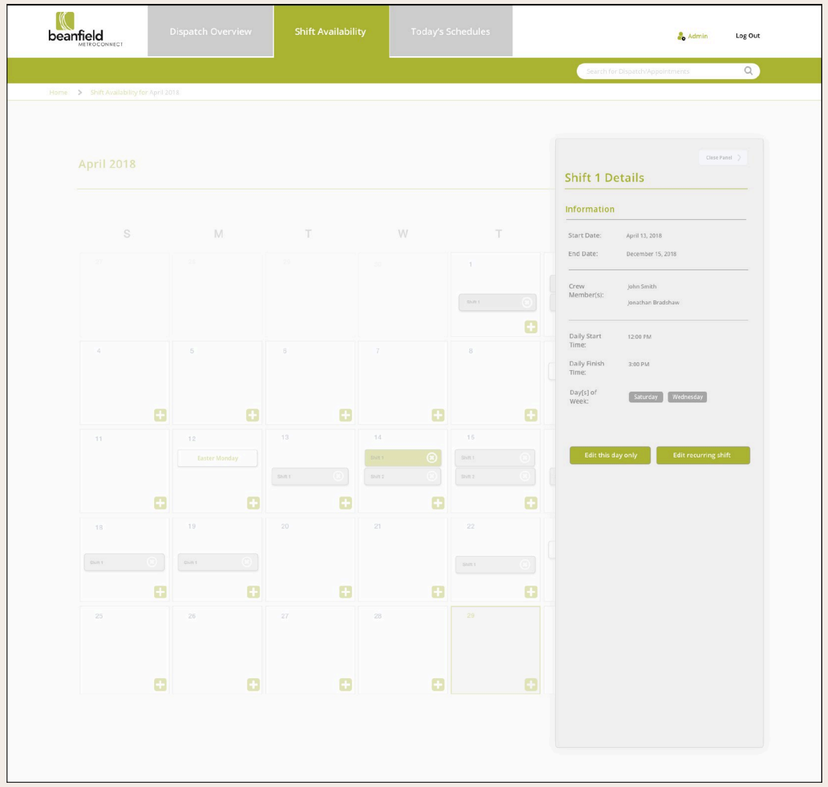
Crew Installation Supervisor only

KEY FUNCTIONALITY

- Schedule an installation team for a one-time or recurring shift.
- The green + on each day adds a new shift.
- Statutory holidays are marked so appointments aren't booked on them unless necessary.

SCREEN 04 · SHIFTS

Shift details



WHO USES IT

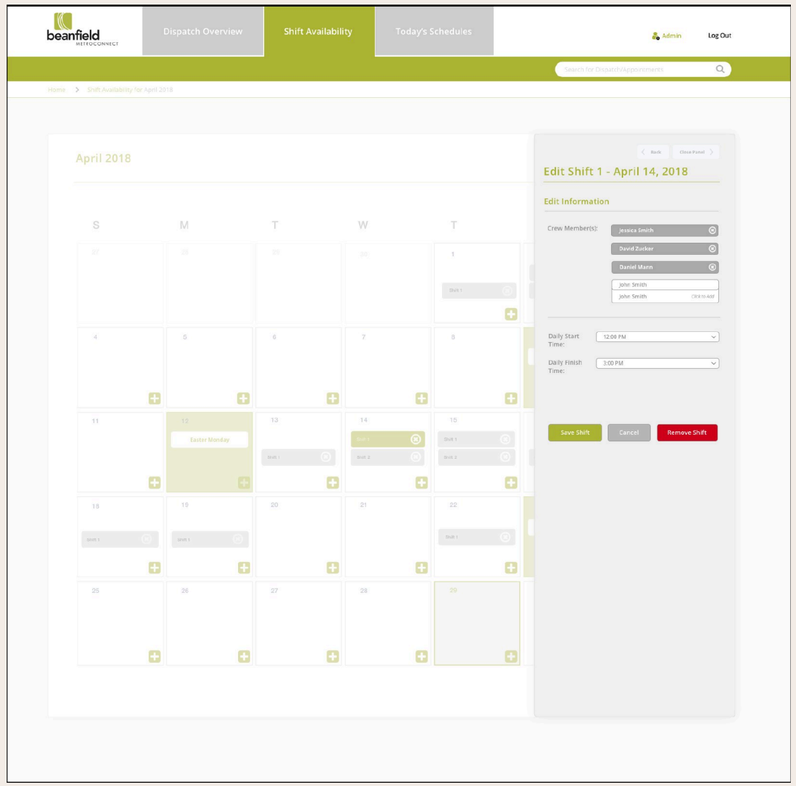
Crew Installation Supervisor only

KEY FUNCTIONALITY

- Click any shift to view or edit its details.
- Choose **Edit this day only** or **Edit recurring shift**.

SCREEN 05 · SHIFTS

Crew member assignment



WHO USES IT

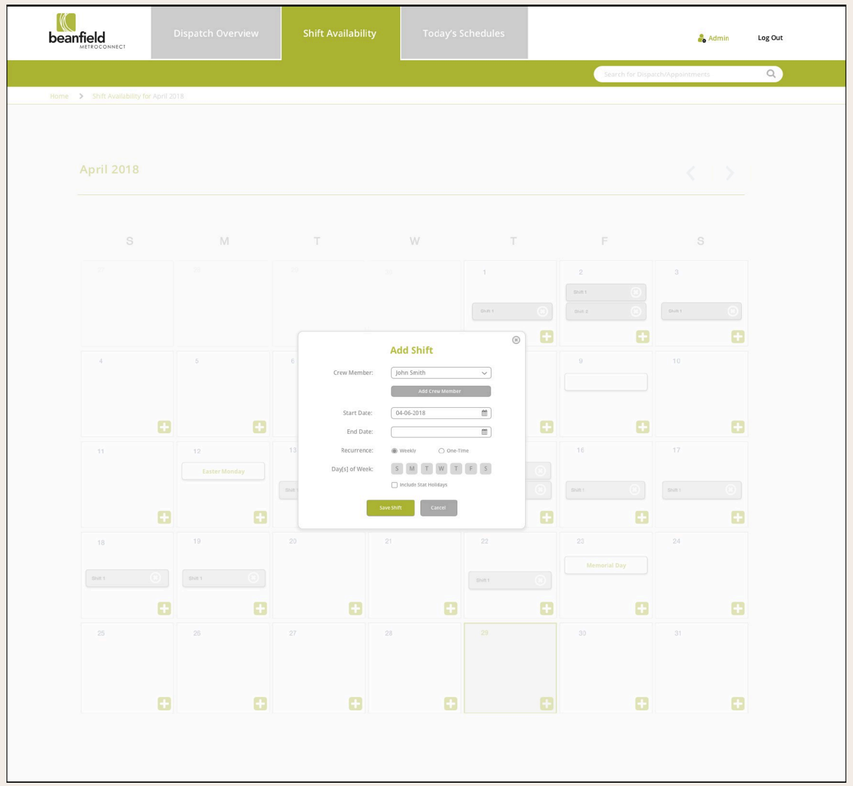
Crew Installation Supervisor only

KEY FUNCTIONALITY

- Add or remove crew members assigned to a shift.
- Change a shift's start and finish time.

SCREEN 06 · SHIFTS

Add a new shift



WHO USES IT

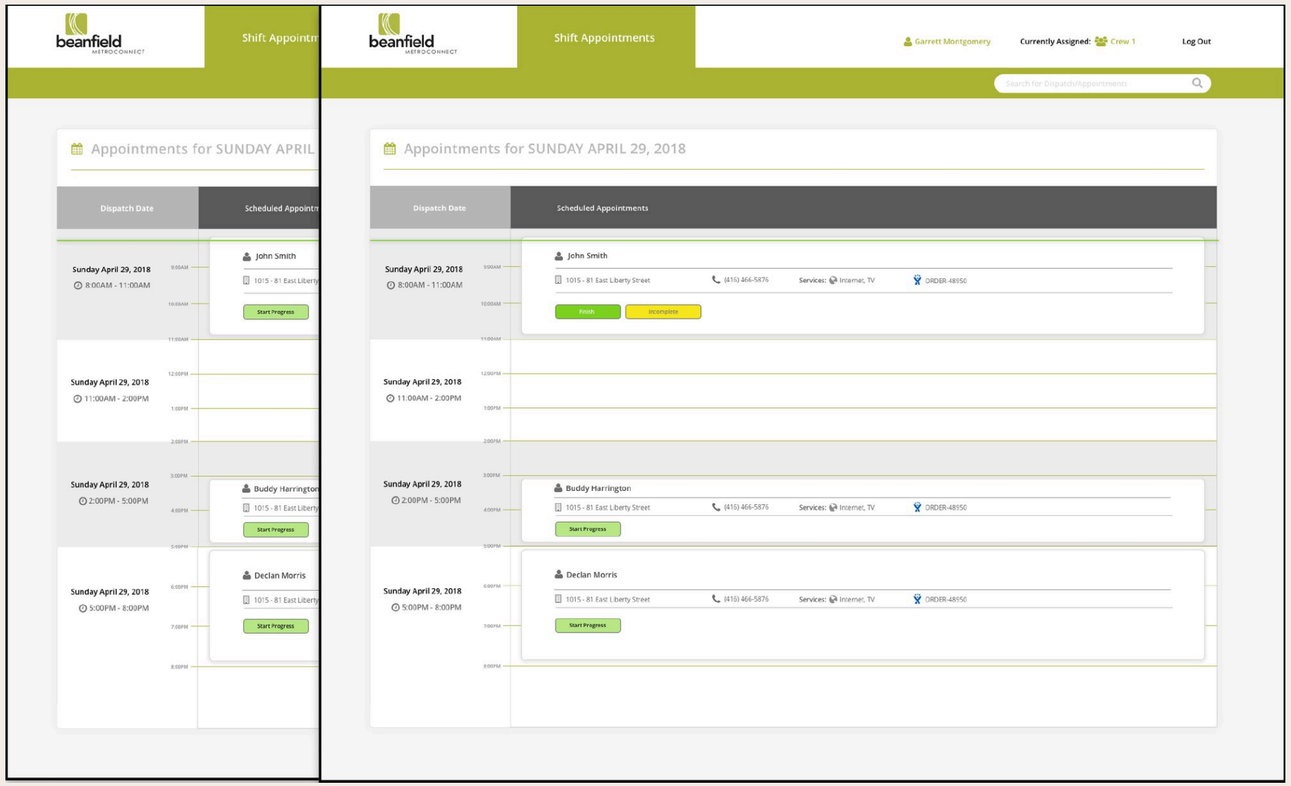
Crew Installation Supervisor only

KEY FUNCTIONALITY

- Create shifts as needed. This iteration allows up to 3 per day.
- Shifts are named Shift 1, Shift 2 and Shift 3.

SCREEN 07 · ON-SITE

Shift appointments



WHO USES IT

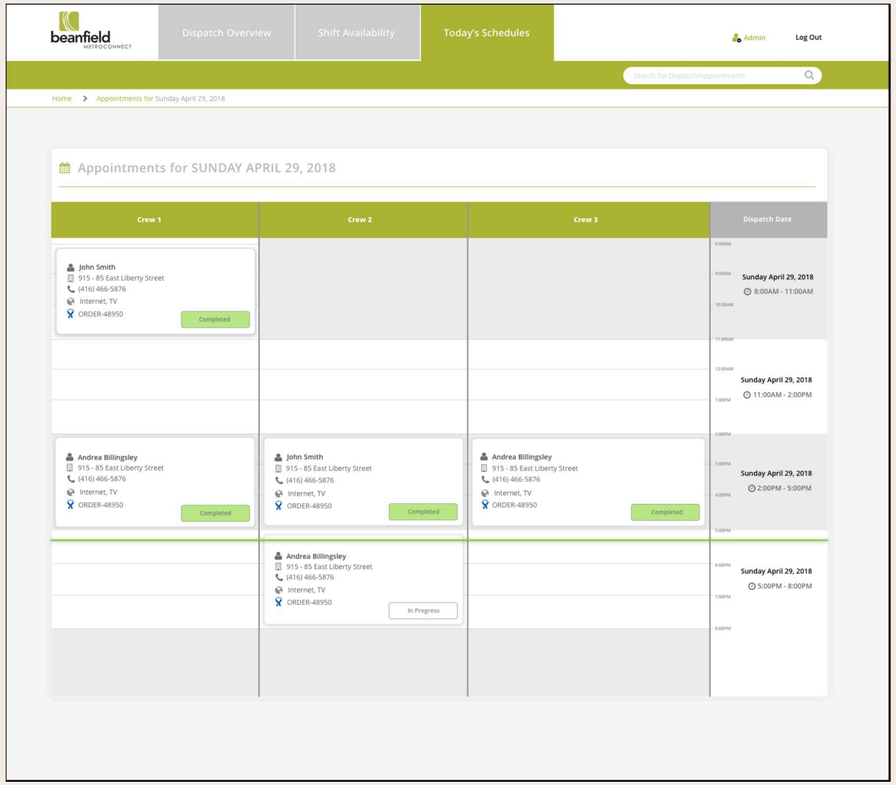
Crew Installation Member

KEY FUNCTIONALITY

- Each crew member sees only their own schedule.
- On-site, they move status from Start Progress to In Progress to Complete.
- Live data: a green line moves as time passes.
- **The only responsive screen** (mobile and tablet), since crews use it on the go.

SCREEN 08 · OVERSIGHT

Today’s schedules



WHO USES IT

Crew Installation Supervisor only

KEY FUNCTIONALITY

- See every appointment scheduled for today, by crew.
- Spot which are completed or incomplete.
- Live data: a green line moves as time passes, and status badges update.
- Also shown on an office TV, run from a Raspberry Pi 3 Model B.

09 · RESULTING OUTCOMES

What changed for each user

FOR THE

Scheduling Coordinator

A reliable, fast way to spend their time on scheduling itself, which let them book more appointments day to day.

FOR THE

Crew Installation Supervisor

Schedules crew to one-time or recurring shifts with more flexibility, instead of tracking the team's schedule by hand.

FOR

Customers

See open slots for the next 2 weeks while ordering, instead of waiting 24 hours for the Scheduling Coordinator to reach out.



Thank you

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