

Problem Definition

The Demo team needs a video tutorial tool to show the Facets product's value for the wow factor. They need videos to help follow-up their live demos of the software that can also serve as a future reference.

The Training team needs a video tool to help users be introduced to the Facets product with step-by-step instructions on performing procedures in Facets. They need videos that will help fill the gap of training they provide their clients.

The App Support team needs video tutorials that will teach practical lessons on performing procedures inside Facets. They need videos to help users understand the latest features and functionalities being introduced in Facets and provide assistance in troubleshooting the software, possibly saving calls and tickets to Customer Support.

Actual Facets users need complimentary teaching materials that will help them efficiently use Facets applications, especially those using apps for the first time, as well as and introduce them to new functionality of new applications.

To best serve our current users and prospective customers, we need to develop a series of video tutorials to help our Demo, Training, Application Support teams, and actual Facets users be more productive in their methodologies.

Proposed Solution

The Product Experience Team can produce videos that will support the Demo, Training, Application Support teams, and actual users. We will do the following to produce these videos, with a special focus on the following:

Demo:

- Facets Workflow; NetworX Pricer; Capitation/Assigned Risk Module
- Enrollment; Billing; Claims
- VBR, UM match, EDI, claims, HIPAA privacy.
- Getting Started/Quick Start and Web Facets

Training:

- Reset navigation/getting started; Logging in; general navigation; claims in browser vs. classic app; membership; specific requests from clients.
- Billing 360, invoicing (over/underpayments), accounting, finance, journal entries.

- Billing (most contentious) would love an end-to-end video on Billing; Claims (UM, adjudication); eligibility, especially when subscribers switch subgroups.
- What's new; most popular or trending topics.

Application Support:

- Any new functionality; more complex functionality; claims processing; claim UM match rules, any 360 based like Benefit 360, billing 360, membership.
- Any new functionality; ITS Claims, claim UM match rules (claims and plan).
- New functionality, workflow, claims, claim UM match rules.
- New features, Getting Started; claims, web apps.

Actual Users:

- Introduction to Facets; getting started guide, what's new; intro to new functionality; most commonly used videos; specific application tutorials; demo videos; plus other videos PM identifies as a priority to show.

Value

Studies have shown that short instructional video clips allow for more efficient processing and memory recall. The visual and auditory nature of videos appeals to a wide audience and allows each user to process information in a way that's natural to them. In a nutshell, videos are good teachers.

Here are the major benefits:

1. Increased Profits

- Making an orientation process a part of your marketing, and providing training as part of our product support, improves the customer experience and satisfaction with the product.
- Increases the value of our software to clients as users can use it more quickly and effectively.
- Both of these factors lead to the positive feedback that helps drive sales. Increased sales mean not only revenue but improved value to the organization and its shareholders.

2. Customer Development and Retention

- Taking charge of the learning process for our software through a series of instructional videos allows customers to learn at their own pace or focus on their individual needs and skills, which lends an air of customization to the product without changing the product itself.
- Online learning brings retention at least 40 percent faster than traditional lessons.
- Customers are happier because they get the results they want more quickly.
- They can also feel that they've solved a need or problem through our software, cultivating their abilities and increasing self-worth.
- This kind of experience means they are also more likely to return for additional purchases.

3. Cost-Effective and Immediate Satisfaction

- Another benefit in providing instructional videos to sales prospects is the convenience of viewing videos from anywhere, at any time they like.
- Making instructional videos free and easily accessible is a great sales tool that costs little money and minimal effort.
- Any prospective customer will want to see some form of a demo to understand the interface and see what actual use involves.

4. Information is Absorbed Equally

- The information disseminated is the same and equal to all who access it. What is being given is the same instruction to perform a set of actions that users understand and can share with one another.

Final Thoughts and Next Steps

Written instructional help has become crucial in assisting current users on how to use the apps efficiently. They are good, but coupling them with interactive and instructional videos will make the user experience better. Short instructional video clips allow for more efficient processing and memory recall. The visual and auditory nature of videos appeals to a broad audience and allows each user to process information in a way that's natural to them. Based on experience, videos are the preferred medium by which people learn how to perform a given procedure. The popularity of YouTube instructional videos is proof of this. The time to integrate them with our Browser Apps is now.

To do this, we are suggesting the following approach by preparing a more thorough implementation plan that includes (these are still questions that will need to be resolved through the guidance of Facets leadership):

1. ARCH/DI to help scope the requirements on how to embed the videos in the application:
 - a. What are the specifics?
 - b. Timeline to release; will the video go with the package?
 - c. Where will the videos be located/stored?
 - d. What are the login security and protocols?
2. How to integrate security protocols that allow users permission to edit/view applications to open and view the video tutorials?
 - a. Do users need to access customer exchange to be able to view the videos? – No dependency on CX
 - b. Or will Facets security be enough to allow the user to view them?
 - Take advantage of facets security to allow content, this will require design of this as viewed as a separate application.
 - Another security parameters: if video is available, then this video will show
 - Where this is to be stored? Content server within Facets implementation.

- c. Can we apply the same security to open/view videos that if the user is permitted to view an application, they should see any video associated with it?
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- d. Can CX be used as an access point, or never be allowed?
- e. Copyright/watermarks are part of the video. How best to display them?
- 3. Legal
 - a. Can there be a way a user logs into Facets, where they will automatically be logged into customer exchange and not see the CX login?
 - b. Can an application or service do this behind the scenes?
 - c. What is the specific guidance that needs to be resolved to meet legal approval?
- 4. Establish the top-level resource needs on:
 - a. QA: What are the specifics – testing security, what can they view, they cannot view?
Enhancement to view videos – QA – like any other feature, will depend on the set of functionalities that this project will be developed.
 - i. QA will need to groom (understand what it is going to do), create a test that covers the functionalities intended:
 - 1. SA security setup (disable/enable); QA dependency (test coverage of incorporating these videos into Facets)
 - 2. Platform, browser version perspective, Chrome/Edge/Firefox
 - 3. Stored procedures, where the videos are to be stored, resizing, opening it in one page, following up along.
 - 4. Apps are constantly being updated, versioning, etc.; how will that be maintained?
 - To be determined
 - 5. Create a plan for Performance test the web apps once the video is enabled to check memory, loading time, etc.
 - 6. Testing the videos under different resolutions.
 - 7. Browser extension perspective
 - 8. Any shortcuts to play them?
 - ii. How about Citrix? Will it be considered as part of the platform for the tutorial?
 - Depends on how this will be made available.
 - b. DEV – who will develop, how will the development process go? The approach will not be platform-dependent but environmental-dependent. The Facets security team will need to approve what needs to be installed to the client's environment.
 - i. The service side of things:
 - 1. May not need a big service if done from CX
 - 2. Where are we posting these videos? If we are to host them, then probably code the path, no need to have a service.

3. Will the videos reside in the clients or CX (or another repository within Facets)?
 - a. If CX may not need to have a service and load the videos to the UI
 - b. If not, where the storage/hosted basically will determine how the videos will be coded – if in client, then it requires major thought on how to call, view
 - c. How about version control and maintenance?
 - ii. UI development (can follow the same DEV process as to how the Data Dictionary was developed and probably use similar components):
 1. HTML coding – Groom, identify the use of any base controls already existing. If none yet, build from scratch with kendo and or angular components.
 2. Media player – if in CX, then video scripts may easily be integrated to display the sub-navigation titles and play them through whatever Camtasia generates. If to reside within clients, then permission to load those scripts may be required – maintenance and editing of those videos will need to be researched.
 - a. Maybe include video changes maintenance when bug fixes are distributed to clients.
 - b. Will the player be local machine installed (user has admin rights)? Or would it be OS default like VM?
 3. User-level security – Facets access protocols may also be used the same for accessing the videos. Users can see the tutorial icons only if the user has permission to the global or application-specific video tutorials.
 4. In Frame – are we even considering supporting this? If not, then this will become an incentive for clients to move to the browser.
 - iii. Consider the Bionic channel as a repository of videos: What's New in Facets; Facets Getting Started Guide; any videos not needing comprehensive security protocols. If so, what are the security protocols?
5. PM – decision-making process as to the video creation priority

Keith:

- This effort requires close dev support.
- Efforts leading to here, Interactive Videos, will be foundation
- Security – in CX, Bionic, users have ability to download videos and store within user's machine
- Watermarks
- Restrictions from security standpoint

Next steps:

- RMT guidance
- Security clarification
- For release – maybe start creating videos:
 - o What's New in Facets
 - o Facets **Getting Started** Guide
 - o Video Contents – work with next PO/PM (Ana)
 - o Repository: Bionic – goal is to introduce Facets to clients and to the rest of Cognizant universe

-> Next week: list of topics of videos from getting started (Joe by Monday)