

Top-Level Report: Visual Claims Tracker Solution for Enhanced Member and TopCashback Benefits

Executive Summary

In an increasingly competitive cashback landscape, customer satisfaction and efficient processes are pivotal for the success of cashback platforms like TopCashback. This report proposes the implementation of a Visual Claims Tracker solution to enhance member experience and streamline operations.

By providing members with a transparent and user-friendly real time tracker to inform and reassure the customer of their cashback claims visually, this solution aims to reduce excessive communication, reduce customer support overhead, save time for both the members and the company, and ultimately boost TopCashback's reputation and profitability.

Introduction

TopCashback is a prominent cashback platform that allows users to earn money back on their online purchases. As the platform continues to grow, ensuring a seamless user experience and maintaining trust become crucial factors in maintaining its market position.

One pain point often faced by members is the uncertainty and lack of transparency in tracking their cashback claims. To address this, a Visual Claims Tracker solution is proposed.

Solution Overview

The Visual Claims Tracker is a user interface enhancement integrated within the TopCashback platform. It allows members to easily monitor the status and progress of their cashback claims through visual representations. The key features of the proposed solution are:

Real-time Status Updates

Members can view the real-time status of their cashback claims at various stages, such as pending, approved, declined, and paid. This eliminates the need for members to repeatedly check their claim status and reduces anxiety about the progress of their claims.

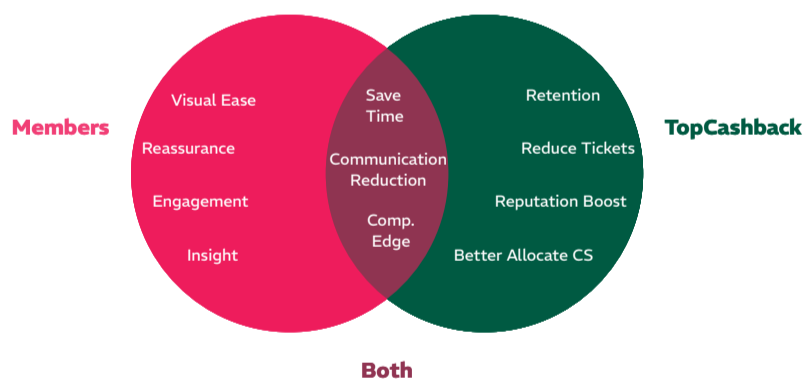
Interactive Timeline

A graphical timeline visually displays the journey of a claim, from submission to payment. This feature offers members a clear understanding of the different stages and estimated timeframes involved.

Mobile and App Compatibility

The solution is accessible through both desktop and mobile devices via the website and app, enabling members to track their claims on the go.

Benefits



For Members

Visual Ease: Providing enhanced UX, the Visual Claims Tracker offers members a sense of control and visibility over their claims, reducing frustration and anxiety.

Reassurance: The customer doesn't feel forgotten about or lost in the process by being given clear and real-time updates via the visual claims tracker.

Engagement: Improved member engagement is a solution that enhances member satisfaction, leading to increased user retention and engagement.

Insight: The customer is given the power of insight and understanding of their claim and the typical processes and protocols surrounding this journey.

Save Time/Communication Reduction: Members spend less time seeking claim updates and can focus on their shopping activities.

Competitive Edge: Higher customer retention, onboarding, increased trust and reputation.

For TopCashback

Retention: The solution enhances member satisfaction and convenience, leading to increased user retention.

Reduce Tickets: With access to real-time information, the volume of support inquiries related to claim statuses should decrease.

Reputation Boost: Transparent and user-centred features like the Visual Claims Tracker can improve TopCashback's brand image and trustworthiness.

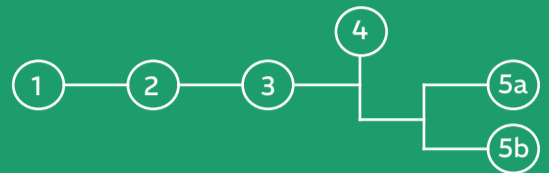
Better Allocate Customer Service (CS): With a predicted reduction in members querying the status and tracking of their claims, CS are freed up to work on more complex queries.

Save Time/Communication Reduction: With access to real-time information, the volume of support inquiries related to claim statuses is expected to decrease.

Competitive Edge: Offering a unique and innovative tracking solution can set TopCashback apart from competitors.

Tracker stages

1. Claim Submitted
2. Processing
3. Pending with Retailer
4. Resolved
5. a) Under Review (Chasing)
5. b) Closed/Contested (Overlay Image)



Implementation

Development

The Visual Claims Tracker will require integration with TopCashback's existing IT infrastructure. This may involve front-end development, back-end integration with claim data, and user authentication.

Conclusion

The proposed Visual Claims Tracker solution has the potential to significantly enhance member experience on the TopCashback platform while simultaneously benefiting the company.

By offering real-time tracking, interactive visuals, and personalised insights, TopCashback can foster member trust, reduce support overhead, and gain a competitive edge in the cashback industry. Through careful implementation and promotion, the Visual Claims Tracker can lead to improved customer satisfaction, higher retention rates, and increased profitability.

Further Recommendations

Message Order: Have messages appear in reverse chronological order. Having the most recent messages display at the top means that the customer (and CS depending on internal systems and processes) don't have to waste time scrolling to the bottom of the page or become confused by text-heavy areas.

Remove 'Send a nudge': This could feel disconcerting for the customer, as though the customer service team need reminding by the customer, or that CS might somehow have missed the customer's message. From a UX perspective, I'd feel somewhat forgotten about if I have to send a nudge in addition to a message, and that there is somehow no concise strategy, order or protocol from TopCashback's CS department.

Notification System: Members receive automatic notifications when their claim status changes, ensuring they are always informed without actively checking the platform.

Personalised Insights: The system can offer personalised insights to members about common reasons for claim declines or delays, particularly if a pattern is detected, empowering them to take proactive steps to improve their cashback success rate.

Earliest Convenient CTA: Display a claim (new/submit and ongoing/see details) CTA from the earliest and most convenient stage to reduce customer clicks.

Sort By: Have options on Customer Services > Existing Claims > Missing Cashback Claims page to sort by Date, or A-Z retailer.

Cleaner arrangement and reduction of space for the text placements of: 'Order Date' to 'Policy Number'.

Consider translations and how this might impact copy implementation.