

Discovery interviews - User management and org hierarchy

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Reference docs

1. <https://observeai.atlassian.net/wiki/spaces/DIP/pages/2472345680/Team+Discussions>
2. [Platform pitch](#)
3. <https://observeai.atlassian.net/wiki/spaces/DIP/pages/2411298819/User+Management+-+pain-points>
4. <https://observeai.atlassian.net/l/c/qjp01o97>
5. <https://observeai.atlassian.net/wiki/spaces/DIP/pages/2394423308/User+Sync+-+Beta+-+feedback>

Persona

Company admins responsible for configuring users on Observe.ai

Goals of the discovery

1. Identify pain points for UM on Observe.ai
2. Discover opportunities for UM on Observe.ai
3. Understand the current state of their org employee mapping to Observe.ai users mapping. Understand their existing mental models of the product.

Tips for interview

- The goal of the discovery is to find opportunities, not reinforce existing biases. Focus on talking about their life and how the workflow fits in more.

- Ask for specific scenarios instead of generic opinions. (I like/don't like it is not a good enough response, we need to understand why). Try for facts and actual scenarios over opinions.
- Don't fish for compliments
- Don't pitch at this stage
- Listen more
- Don't ask questions that can be answered by doing a google search :)
- Don't ask leading questions whose answer can only be a yes or no. For eg. Do you like this feature? Leading questions give no insights.
- Ask more open-ended questions. For E.g. what do you do in your day job? How do you use this product?

Interview script

Note: This is a rough guideline. Feel free to adapt during the interview.

1. Introductions
2. What is your role at <company name>? What does a typical day look like?
3. Ask for **recording** permission. We'd like to go back to this conversation later.
4. The goal of this meeting is to understand how <company> manages users, teams, and roles.
5. What is your understanding of teams, users, and roles in Observe.ai. How does it relate to actual teams and roles at your company?
6. What is the typically number of teams? What is the experience of adding new teams?
7. How much time do you end up spending on managing users and teams?
8. **Org hierarchy**
 - a. What is the organizational hierarchy or structure of your company?
 - b. How often does it change?
 - c. What will be the change like (give an example)?
 - d. How is that communicated within your organization?
 - e. How do you group users in your org? If teams/groups, does it match with the teams in OAI?

- f. What is the relationship between org structure and the roles you assign on OAI?
- g. How do you use these teams in various product areas in Observe and why?
- h. What kind of reports or dashboard insights are needed by different personas at different level in the hierarchy? How do you currently achieve this?
- i. When a user moves to a different team, what should happen to the created data? e.g. Agent moves to a diff. team, should evaluation data/interactions for that agent also move to the new team?
- j. When a QA moves from one team to another, what should happen to the evaluations done by the QA? Will the old data impact the score of the new team? How is a QA evaluated?
- k. Data access restriction - on dashboard (insights) and on reports
- l. What is expected when a user leaves the org? What happens to his/her data?
- m. What is the nomenclature and method in which different groups/teams are formed in your organization?
- n. Can any user have more than one manager? If yes, please elaborate
- o. Does hierarchy change depending on the channel?
- p. Are there any specific tools used to capture your organization's structure? (eg: Workday, Pingboard..)
 - i. How does it map to your Observe.ai account? (Ask them to show)

9. User management

- a. When was the last time you had to add a user? What was the process like?
- b. How do you know you have to add or edit users?
- c. Is there a case where you need to add or edit multiple users? How do you do it?
- d. How often do you need to add or edit users or roles?
- e. Did you ever have to update users or teams?
 - i. When was the last time you did it?

- ii. How did you go about it?
- iii. Do you have to do maintenance of users? What does that look like?

Adrian(Sales)

- You worked at contact center and used other products have been in csm and sales. How do u rate our user management capabilities? Whats good and what can be better?
- Do u face these challenges at sales cycle or or at a later phase?
- What type of needs do u usually find at provisioning stage?
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Concentrix -

1. Why do we have these users mapped to so many teams? Some users are mapped with 100 teams and many users are mapped with 10+ teams
2. Why do we have so many teams? 100+ teams
3. Why do we have as many as 1000 people mapped to one team? Many teams have more than with 100+ team members
4. Whats are the goals of these teams?
5. Does workday have Team information too?
6. Who represents the team? Who heads these teams?
7. Is there hierarchy among these teams? How are these teams related to each other?
8. How are these teams setup on your side?
9. How are roles related to each other
10. Do they have use-cases where they need to restrict data?

Role Name	Access	Users	Actions
Agent		1807	View
Manager		159	Delete Edit
Supervisor CNX		138	Delete Edit
Supervisor		47	View
Admin2		36	Delete Edit
QM Builder		13	Delete Edit

a.

1. How do you group users in your org? If teams/groups, does it match with the teams in OAI?

2. More insights into grouping needed by location or business or intent etc. Same as teams? What is the use of these groups?
3. When a user moves to a different team, what should happen to the created data? e.g. Agent moves to a diff. team, should evaluation data/interactions for that agent also move to the new team?
4. What is expected when a user leaves the org? What happens to his/her data?
5. Aggregation and drilldown use case in reporting and dashboards
6. Is the hierarchy diff for diff channels?
7. Validate potential solution