# Discovery interviews - User management and org hierarchy

Design	Akshay Kore
Research	Akshay Kore Bhanu Anupama Atmuri Ritesh Sharma
Product	Bhanu Anupama Atmuri Ritesh Sharma

## Reference docs

- 1. <a href="https://observeai.atlassian.net/wiki/spaces/DIP/pages/2472345680/Team+Discussions">https://observeai.atlassian.net/wiki/spaces/DIP/pages/2472345680/Team+Discussions</a>
- 2. Platform pitch
- 3. <a href="https://observeai.atlassian.net/wiki/spaces/DIP/pages/2411298819/User+Management+-">https://observeai.atlassian.net/wiki/spaces/DIP/pages/2411298819/User+Management+-</a>
  +pain-points
- 4. https://observeai.atlassian.net/l/c/gjp01o97
- 5. <a href="https://observeai.atlassian.net/wiki/spaces/DIP/pages/2394423308/User+Sync+-+Beta+-+feedback">https://observeai.atlassian.net/wiki/spaces/DIP/pages/2394423308/User+Sync+-+Beta+-+feedback</a>

## 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
- I. 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?

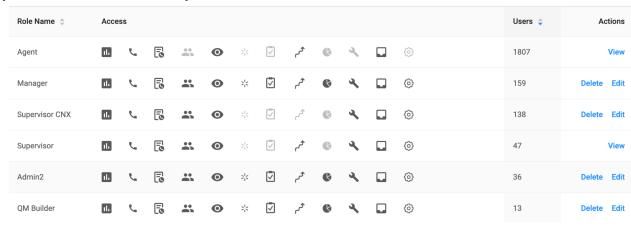
## Adrian(Sales)

- 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?



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