Research insights - User Management and Org hierarchy

The following document is a summary of primary research conducted to identify challenges and opportunities for user management and user organization on Observe.AI. The team conducted a total of 18 interviews with customers and internal stakeholders.

18 interviews

(12 customers, 6 internal stakeholders)

Team

Interviewing	Akshay Kore Ritesh Sharma Bhanu Anupama Atmuri
Synthesis	Akshay Kore Ritesh Sharma
Documentation	Akshay Kore

Persona

Company admins and internal stakeholders who are involved in managing users for customer accounts.

Definitions

User management

User management refers to the process of adding, updating, removing and moving users between teams on OAI.

Org hierarchy

Org hierarchy refers to the logical organization of users within hierarchies. Eg. Agents reporting to supervisors, supervisors reporting to Directors, etc.

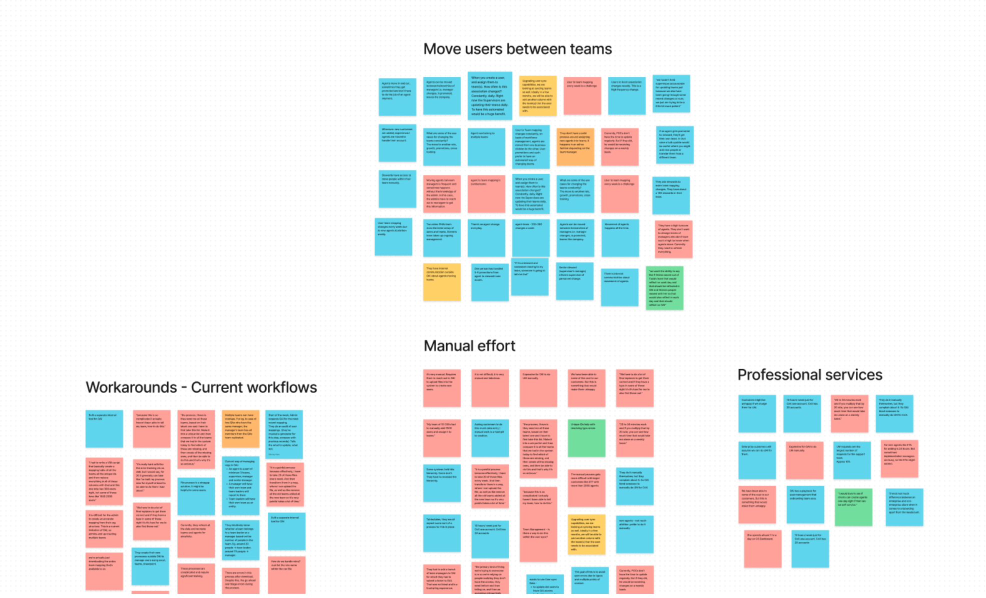
Reference docs

1. Discovery interview script - UM

2. User roles and permissions - Secondary research
3. User management and Org hierarchy User interviews - Notes
4. Platform - themes
5. Synthesizing user interviews - Affinity exercise
6. [Research and insights] - User management and Org hierarchy - Summary deck

Process and methodology

1. The team conducted 18 interviews with customers and internal stakeholders responsible for user management on OAI.
2. The goals of the interviews were to:
   a. Identify pain points for UM on Observe.ai
   b. Discover opportunities for UM on Observe.ai
   c. Understand the current state of their org employee mapping to Observe.ai users mapping. Understand their existing mental models of the product.
3. After interviews, the team created detailed notes for each interview.
4. The pointers on the notes were then tagged either as pain points, insights or ideas.
5. The team then prepared an affinity map of these insights. The result of the affinity exercise was groups/buckets of important areas to focus on.
6. Out of these buckets, customer comments, the team summarized findings in this report.



Snippet of the affinity exercise

Index

Current state

User management with OAI is currently a tedious and time-consuming process for customers and OAI internal teams. There are three major parts of user management:

Adding, updating, and removing users

Whenever a customer wants to add or update users, they have to reach out to their CSMs or support teams, who ask OAI's implementation team to complete the action through an internal tool. This internal tool requires the implementation team to upload a structured CSV with various parameters like email, role, team, etc. After the upload is complete, the users are updated within 24 hours. Customers need to follow the same process for one or multiple users.
Requests for the removal of users are rare, and most users opt to disable users instead of removing them. Users are not removed for compliance reasons. They are disabled and the linkages to their data is needed for the org.

Organizing users

Currently, customer team structures (like hierarchies) and the organization of users do not reflect accurately on OAI. On OAI, there exists only a single level of grouping in the form of 'Teams.' Customers get around this limitation by creating multiple teams and duplicating agents. For e.g.,5 agents each report to Supervisor A and Supervisor B, who in turn report to a Director. In order to create this hierarchy in OAI, customers need to create two teams for each of the supervisors and an additional team for the director, which contains all agents reporting to the supervisors. The number of teams increases exponentially with the number of reporting levels and managers.
A contact center is a dynamic environment in which there is a high turnover and a constant movement of agents across teams and in and out of the company. Agents can move on a weekly basis. However, this change does not reflect immediately on OAI. There is often a time lag of a week between the team structure on OAI and the ground reality of the customer's company.

Access control

Feature access

Each user on OAI is given a role (agent, supervisor, QA) that determines their access to features within the platform. OAI roles often reflect their real-life positions in their own companies.

Data access

Access to viewing data is not dependent on the role on OAI. Currently, data access is managed through teams assignment and metadata filters to control which users can view how much. Data access governs the experience of using OAI during reporting and evaluation workflows.

Summary of insights, challenges, and opportunities

The following is a summary of key insights, major challenges, and opportunities for user management on OAI:

1. A contact center is a dynamic environment in which there is a high turnover and a constant movement of agents across teams and in and out of the company.
2. User management with OAI is currently a tedious and time-consuming process for customers and OAI internal teams.
3. Customers need to go through multiple touchpoints to add, update or remove users.
    a. They need to put in the same amount of effort to add one or a thousand users.
    b. There is no self-serve mechanism to add users.
    c. Editing individual users is easy to do on OAI. However, users often need to be updated in bulk which is currently tedious.
    d. Removal of users is rarely done. The majority of customers choose to disable users instead of removing them. Disabling is also referred to as a 'soft delete.'
    e. In some cases, multiple supervisors want to add agents at the same time. Currently, this is not possible within OAI.
    f. Agent creation is not a challenge during onboarding.
4. Customer team structures (like hierarchies) and the organization of users do not reflect accurately on OAI.
    a. There are different ways for organizing users beneficially for customers, viz. Hierarchies, teams, groups/cohorts
    b. Hierarchies reflect the customer's team structures most accurately.
    c. Currently, they use multiple Teams and duplication of agents as a workaround to replicate their own hierarchies. Managing this discrepancy is a major challenge for customers.
    d. There are also cases where customers create groups or cohorts to monitor specific data and activities within their organization. E.g., creating a sales agents team to view sales agent performance across the BPO. These groups don't follow the same hierarchical structures. Currently, this is done by creating teams and applying metadata filters.

5. Roles are a mechanism to control access to features. OAI roles often reflect users' real-life positions in their own companies.
6. Data access is managed using the Teams construct by applying metadata filters. Data access governs the experience of using OAI during reporting and evaluation workflows.
7. Customers and OAI internal stakeholders need to put in a lot of manual effort to do user management.
    a. There is a high turnover and a constant movement of agents across teams and in and out of the company.
    b. When agents are added, removed, or shuffled, they need to move between teams on OAI. Moving agents between teams is the most tedious, time-consuming, and highest frequency task for user management.
    c. OAI has built an internal user sync tool that uses a method of uploading a CSV to reduce this manual effort.
    d. To reduce this effort and utilize user sync effectively, customers devise various workarounds in their internal workflows. E.g., building automations for updating teams on excel, find and replace users, etc. However, these manual workarounds are specific to an individual admin, and the knowledge is not shared.
    e. Customer workarounds often lead to their own challenges. For example, a typo in an agent's name in the CSV upload will lead to the creation of duplicate agents, or a typo in the team name will result in an error. Currently, there is no way to identify these mistakes and errors until the process of ingestion is complete. If there is an error, they need to go through the process of user sync again.
    f. Sometimes large customers will hand off the process of user management completely to OAI. Doing this on behalf of users is expensive for OAI and is sometimes charged to customers as professional services. Most customers feel that this is not ideal.
8. Most customers feel that automating user management would be ideal but doing this has significant challenges.
    a. Different customers have different applications for managing user rosters. In some cases, one customer can have multiple user roster applications.
    b. Many customers are not open to giving access to APIs from their user rosters, citing security concerns.
    c. Workday is the most common user roster application.
    d. Transforming their org structure from their user roster application to OAI teams is a large pain point. Automating this transformation might be a big painkiller.
    e. OAI already does some level of automation during the agent ingestion process. Most customers are happy with this arrangement. However, there are some edge cases where customers want to add agents manually, e.g., acquiring a company.
    f. There is an expectation that there should be some bulk updating capabilities in the platform.
9. Search and filtering capabilities for user management need to be improved. Currently, search is limited to name search. However, this is a mild pain point.

10. Error management in the current process is weak. Users come to know of errors only if they investigate them after ingestion. OAI does not have a good mechanism to inform users of errors, mistakes, or success/failure during ingestion.
11. There is a use case for notifying admins when users are added or updated on OAI. However, this is not a deal breaker.
12. Some customers brought up a need for history or a changelog of user management. While it has not come up as a large paint point/requirement, we should deep dive into this in the future.

Detailed insights

The affinity exercise revealed some key buckets to identify challenges and opportunities for user management on OAI as follows:

1. Users management actions
2. Organizing users
3. Access control
4. Manual effort
5. Automating user management
6. Others

User management actions

User management actions refer to the ability of users to add, update, remove or move users between teams.

Adding users

It’s a struggle because their training team does not use OAI. So when they get put on the floor, they don’t know who has made through training, who has calls, who’s started taking calls.

“My team of 10 CSEs had to manually add 7000 users and assign it to teams.”

“the primary kind of thing we're trying to overcome is is so we're relying on people realizing they don't have the access, they need before and then telling us, and then as assigning retroactively and to Samantha's point when those people are not on the phones taking calls, you know, having to go through the Multi-step process of submitting a ticket that's that's our biggest inefficiency right now sure.”

Key insights

1. Addition of new users is a high-frequency activity that happens all the time. New users may be added daily or weekly.
2. Creation of the majority of users with ‘Agent’ roles on OAI happens automatically in the ingestion process during onboarding. This is not a challenge, and most customers are happy with this arrangement.
3. For non-agent roles like supervisors or QAs, customers need to reach out to OAI CSMs to get them added. This is done by either sending an email or filing a ticket.

4. There are also times when customers want to add agents later. In such cases, customers need to reach out to OAI CSMs by sending an email or filing a ticket.
5. Users can be added one at a time or in bulk. Most large accounts add multiple users at the same time. However, the majority of requests range from 1 to 15 users at a time.
6. Contact centers have a high attrition rate of agents. Many agents leave after working for a few days. Because it is tedious to add agents on OAI, customers wait till they are sure that an agent will remain in their company before adding them to the OAI platform. Most agents have a gestation period where they observe another agent before they can start taking calls.
7. When duplicate agents are added on OAI, there is no confirmation of a duplicate. However, this is not a major concern.
8. Additionally, if the original agent profile was disabled, the new profile is also disabled and their data doesn't show up on the platform. Users expect agents to be enabled by default when they are added.

Pain points

1. It is tedious and time consuming to add new users post onboarding. Users need to go through multiple touchpoints to complete what they think is a simple request.
2. Adding one user or multiple users requires the same amount of high effort.
3. Due to high attrition rates within contact centers, customers are wary of adding agents to OAI platform before they are sure of the agents' retention. They don't want to waste the effort of creating users on OAI.
4. There is confusion in the behaviour of adding enabled/disabled agents to the platform.

Potential solutions

1. Enable customers to add a single or multiple users through GUI.
2. Enable customers to add users in bulk.
3. Provide customers with clarity on the state (enabled/diabled) of a newly added user.

Updating/editing users

"if I need to update a group of users, like their roles, you have to do it, one by one."

"Biggest thing we need is the ability to update users and move them between teams (maybe in bulk)."

Key insights

1. Updating individual users is currently not a challenge.
2. There are many cases when multiple users need to be updated.

Pain points

1. While editing individual users is not a problem, it becomes especially tedious when customers need to select and update multiple users.

Potential solutions

1. Enable customers to select multiple users and update them at the same time through GUI.
2. Enable customers to update users in bulk.

Removing users

Key insights

1. Removing users is a rare type of request.
2. The majority of customers choose to disable users instead of removing them. This also happens because of compliance or legal reasons.
3. Disabling is also referred to as a 'soft delete.'
4. It is more important for customers to be able to deactivate or disable agents over removing them.
5. Users are never removed due to compliance and legal reasons.

Pain points

1. Most customers don't want to remove users but want to disable them. Currently, disabling users needs to be done individually which is tedious and time consuming.

Potential solutions

1. Enable customers to quickly and efficiently disable/deactivate multiple users.
2. Enable customers to archive disabled users who have left their company.

Moving users

“It is a painful process because, effectively, I have to take 20 of these files every week. And then transform them in a way, where I can upload the file, as well as like remove all the old teams added all the new team so it's very painful takes a lot of time.”

“I won't be able to make that call because I'm unsure as a manager if this actually represents the trend of my team. it might be something different, and what will happen is that I might call out to focus on offensive language when, in fact, last week, our top opportunity really would be hold time.”

Key insights

1. A contact center is a dynamic environment in which there is a high turnover and a constant movement of agents across teams and in and out of the company.
2. When agents are added, removed, or shuffled, they need to move between teams on OAI.
3. Moving agents between teams is the most tedious, time-consuming, and highest frequency task for user management.
4. Agents can be moved on a weekly basis.
5. However, this change does not reflect immediately on OAI. There is often a time lag of a week between the team structure on OAI and the ground reality of the customer’s company.
6. Moving agents between managers is frequent and sometimes happens without the knowledge of the admin. In this case, the admins have to reach out to managers to get this information and update on OAI.
7. Agent movement mostly happens in bulk.
8. OAI has built an internal user sync tool that uses a method of uploading a CSV to reduce this manual effort.
    a. To reduce this effort and utilize user sync effectively, customers devise various workarounds in their internal workflows. E.g., building automations for updating teams on excel, find and replace users, etc. However, these manual workarounds are specific to an individual admin, and the knowledge is not shared.
9. Users need to create multiple teams to reflect their actual team structures on OAI. The current limitation of teams in OAI without nesting/hierarchies results in the tediousness when moving agents between teams.

Pain points

1. Moving agents between teams on OAI is tedious and cumbersome. But it needs to be done very frequently.

2. Lack of nesting or any hierarchical construct on OAI, makes the task of moving agents more challenging.

Potential solutions

1. Enable customers to move multiple agents efficiently through GUI.
2. Enable customers to update agents' teams in bulk.
3. Enable nesting/hierarchies to reduce the number of teams, thereby reducing the effort of moving agents.

Organizing users

This section looks at different ways of logically grouping users based on their reporting structures and metadata. There are different ways for organizing users beneficially for customers, viz. Hierarchies, teams, groups/cohorts.

"I think we need to be flexible. In my experience working with customers, every customer is going to do it slightly different."

Hierarchy

"Unless we can build some type of hierarchical system that takes you know the stewards and then the senior stewards that they report to and align things that way well we're not going to be able to to manage any anything else."

An org based view can help with measuring KPIs of different levels. Eg. the KPI of a supervisor is different from a director.

Key insights

1. Customer team structures (like hierarchies) and the organization of users do not reflect accurately on OAI.
2. OAI currently does not support a hierarchical organization of users. There exists only a single level of grouping in the form of 'Teams.'
3. Customers get around this limitation by creating multiple teams and duplicating agents. For e.g.,5 agents each report to Supervisor A and Supervisor B, who in turn report to a Director. In order to create this hierarchy in OAI, customers need to create two teams for each of the supervisors and an additional team for the director, which contains all agents reporting to the supervisors. The number of teams increases exponentially with the number of reporting levels and managers. We have seen extreme cases when one agent is mapped to more than 250 teams.

4. Hierarchies reflect the customer's team structures most accurately.
5. Currently, they use multiple Teams and duplication of agents as a workaround to replicate their own hierarchies. Managing this discrepancy is a major challenge for customers.

Pain points

1. The lack of a hierarchical construct makes it difficult to manage users, especially when moving agents between teams.
2. It gets more complicated to build teams when there are multiple levels of hierarchy.
3. It is difficult for the admin to create an accurate mapping from their org structure. This is a current limitation of OAI, so admins ended up creating multiple teams.

Potential solutions

1. Enable users to create nested groups and hierarchies.
2. Enable users to move groups or users between groups easily.

Team

It is difficult for the admin to create an accurate mapping from their org structure. This is a current limitation of OAI, so admins end up creating multiple teams.

Key insights

1. A team is a group of users.
2. Teams construct exists currently within OAI.
3. The creation of teams is not a challenge.
4. A team is a core construct within OAI and determines the access and view of data for different users.
5. Teams can have custom attributes like metadata filters. For e.g., a team of QAs with a filter to only view agents' chat interactions.
6. Teams are often used to replicate hierarchies and create specific groups.
7. Agents can be a part of multiple teams.
8. Multiple admins create teams simultaneously.

Pain points

1. Customers need to map their org hierarchies to teams on OAI whenever there is an agent movement or change.
2. Managing the frequent movement of agents between teams is a challenge. Managing teams is tedious, time-consuming, and cumbersome.
3. Teams are a catchall construct for managing agent groups and access to data.

4. Customers need to devise their own ways to manage users between OAI and other applications they use in parallel. This is not consistent across customers.
5. Because of a singular construct of teams, customers have to choose between organizing users into hierarchies or based on properties. This leads to teams that are confusing to supervisors or QA leads when viewing aggregate data.
6. They sometimes create a team with all agents and use filters within tabs (evaluation, coaching, etc.) to simplify the view. This doesn't always work since some metadata filters might not be available on other tabs. This approach also leads to data errors on team views i.e. some users who are not part of a particular team get included in the team's view.
7. Creating and mapping agents to multiple teams is time consuming. Currently mapping 40 teams might take 3-5 business days.

Potential solutions

1. Enable customers to move multiple agents between teams efficiently.
2. Enable nesting of teams and the ability to inherit agents when a team moves.
3. Transforming org hierarchies to teams on OAI automatically.

Groups/Cohorts

Metadata teams are teams based on metadata filters instead of a specific hierarchy. This is created since metadata filters are not present on some tabs on OAI (evaluation, coaching, etc.)

Key insights

1. There are also cases where customers create groups or cohorts to monitor specific data and activities within their organization. E.g., creating a sales agents team to view sales agent performance across the BPO.
2. Currently, this is done by creating teams and applying metadata filters.
3. These groups don't follow the same hierarchical structures.
4. Cohorts can be tracked over a period of time or can also be temporary.

Pain points

1. Customers have to rely on a singular Teams construct to monitor cohorts.

Potential solutions

1. Enable users to create cohorts that are not dependent on hierarchies.
2. Enable users to create metadata-based groups.
3. Enable users to create custom groups to track data.

Other

Following are other factors related to organizing users.

Team nomenclature

CnX is all about manager names as team names. They don't have a team name concept.

Site (geolocation) as a way of organizing teams. E.g, Mumbai, Manila, etc.

Key insights

1. Different customers utilize different ways to name their teams. There is no single pattern for naming teams across customers.
2. Some customers use location names, some use manager names, while some might use a combination.
3. However, once a customer chooses a nomenclature pattern, they tend to use it consistently.

Pain points

1. Copying team name structures is tedious. However, this is not a major concern right now.

Potential solution

1. Automating team naming based on a pattern set by the customer.

Access control

Access control refers to how users access data and how they are assigned features by admins.

Roles - Feature access

They moved from Canvas to Five9 dialer. Roles, email and all other details stayed the same. But they weren't on OAI, so they had to create these roles.

Key insights

1. Roles are a mechanism to control access to features on the platform.
2. Each user on OAI is given a role (agent, supervisor, QA) that determines their access to features within the platform.

3. OAI roles often reflect users' real-life positions in their own companies. However, this can differ between companies.
4. Sometimes one person can have multiple roles in their company, but on OAI they are assigned a single role. This is also because users cannot be assigned multiple roles on OAI.
5. Role names are similar across different tools that companies use. Roles are often defined first on their user roster applications and replicated on OAI.
6. Roles can change if a user gets promoted. However, this is not a frequent usecase.
7. Users understand that roles in OAI are mainly used for operational purposes. They do not have consequences for their day to day. Eg. most directors might be given admin roles.
8. Some customers want to give OAI access by default to agents.

Pain points

1. Maintaining role names across multiple tools is a challenge.
2. Assigning roles to multiple users when their role changes.

Potential solutions

1. Automating creation of roles and access to OAI accounts.

Data access and reporting

They tried to use team construct with filters to restrict seeing of data. That works on calls page but not evaluations page.

“All of the frustration from the users, because at the end of the day, right, I find that be there, I log into that I want to see the information that is related to my team, however, if this week my team has already changed right, and then I am filtering something and then I just realized that hey These are not my agents anymore I just changed my team last week.”

“I won't be able to make that call because I'm unsure as a manager if this actually represents the trend of my team. it might be something different, and what will happen is that I might call out to focus on offensive language when, in fact, last week, our top opportunity really would be hold time.”

Right now a VP sees everything. That is too much information. They need to be able to see an overview.

Key insights

1. Data access is managed using the Teams construct by applying metadata filters.
2. Access to viewing data is not dependent on the role on OAI.
3. Data access governs the experience of using OAI during reporting and evaluation workflows.
4. Data access has a large impact on reporting workflows.
5. Admins also create specific teams to monitor subset of interactions that are not dependent on hierarchies or actual team structures e.g. Inbound calls, Sales calls, San diego teams, etc.

Pain points

1. Since data access is dependent on teams, if teams are not maintained correctly, the data will not show up correctly. The performance report will not be an accurate representation of their actual teams performance.
2. A manager wants to see aggregated data in Team Dashboard, but currently instead of selecting his team, he has to select his Supervisors' team one by one and aggregate the data manually to make sense of agent performance at the desired level.
3. Different users need different levels of detail. A VP might need to see a summary while and supervisor might need to see details of team performance. Currently this is not easily achievable on OAI.

Potential solutions

1. An org based view can help with measuring KPIs of different levels. Eg. the KPI of a supervisor is different from a director.
2. Enable hierarchies and cohorts/groups discussed earlier.

Manual effort

It is not difficult, it is very manual and laborious.

“it requires a lot of human intervention for us before we come up with the roster files right and then It adds another layer that it takes a certain amount of time before those updates can be uploaded and so, by the time that we announced to the team that made updates have been made at that point, it's not already the updated data.”

There is a high turnover and a constant movement of agents across teams and in and out of the company. When agents are added, removed, or shuffled, they need to move between teams on OAI. Customers and OAI internal stakeholders need to put in a lot of manual effort to do user management. This section looks at the different types of manual processes employed currently.

Customer workarounds

“it is a painful process because effectively, I have to take 20 of these files every week. And then transform them in a way, where I can upload the file, as well as like remove all the old teams added all the new team so it's very painful takes a lot of time.”

“because this is so complicated I actually haven't been able to tell my team, how to do this.”

“We have to do a lot of final replaces to get them correct and if they have a typo in some of these right it's it's hard for me to also find those out.”

“the process, I have is they send me all these teams, based on their latest one and I have to first take this list. Make it into a unique list and then compare it to all the teams that we had in the system today to find which of those are missing, and then create all the missing ones, and then be able to do this and that's why it's so arduous.”

They are building their own process of creating reports from Workday (user roster management platform) and pushing them to an SFTP folder. OAI will then use these files to do UM.

Key insights

1. OAI has built an internal user sync tool that uses a method of uploading a CSV to reduce this manual effort.
2. To reduce this effort and utilize user sync effectively, customers devise various workarounds in their internal workflows. E.g., building automations for updating teams on excel, find and replace users, etc.
3. These manual workarounds are specific to an individual admin, and the knowledge is not shared. Each admin might create their own workarounds. Workarounds are not shared with other admins because they are difficult to replicate.
4. Apart from user sync, customers also use various external tools like excel to manage their users on OAI. Most tools are used to convert their own hierarchies into OAI teams.
5. Despite any potential errors, they go through the process of ingestion, and triage errors later.

Pain points

1. Customer workarounds often lead to their own challenges. For example, a typo in an agent's name in the CSV upload will lead to the creation of duplicate agents, or a typo in the team name will result in an error.
2. Currently, there is no way to identify these mistakes and errors until the process of ingestion is complete. If there is an error, they need to go through the process of user sync again.

Potential solutions

1. Enable GUI based management of users.
2. Enable bulk update with error communication in place. Enable users to triage errors immediately instead of waiting for ingestion to complete.
3. Enable hierarchies and cohorts/groups discussed earlier.

Professional services

We have been able to some of the cost to our customers. But this is something that would make them unhappy.

"20 to 30 minutes each and if you multiply that by 20 rate, you can see how much time that would take me alone on a weekly basis."

Customers might be unhappy if we charge them for UM.

Key insights

1. Sometimes large customers will hand off the process of user management completely to OAI.
2. Doing this on behalf of users is expensive for OAI and is sometimes charged to customers as professional services. Most customers feel that this is not ideal.
3. Doing professional services is highly time consuming but can be lucrative.
4. Most internal stakeholders don't prefer to do professional services.

Paint points

1. Professional services are expensive and time consuming for OAI.
2. Customers don't want to pay for user management. They expect this to be available by default.

Potential solutions

1. Enable users to self-serve user management.

Automating user management

This section looks at different ways of automating user management in part or completely.

1. Most customers feel that automating user management would be ideal.
2. There are significant challenges to achieve complete automation right now.
3. The urgency to automate is with large customers.
4. An ideal state for customers is to update their user roster applications and the information automatically showing up on OAI without any manual effort.

“generally most customers would least expect that you have like a user file exchange process that do this automatically.”

Bulk update

“it requires a lot of human intervention for us before we come up with the roster files right and then It adds another layer that it takes a certain amount of time before those updates can be uploaded and so, by the time that we announced to the team that made updates have been made at that point, it's not already the updated.”

Biggest thing we need is the ability to update users and move them between teams (maybe in bulk).

Key insights

1. There is an expectation that there should be some bulk updating capabilities in the platform.
2. Users should be able to control the process of bulk update.
3. Customers feel that the process of uploading CSVs to update users in bulk would be ideal. This is a familiar pattern they have seen across other applications they use.
4. OAI already built a user sync capability to enable bulk update. However, this is not self-serve yet because of the complexity of the process and lack of error handling. Customers feel that the user sync process is highly technical and requires some handholding.

Pain points

1. Currently, in user sync there is no way to identify these mistakes and errors until the process of ingestion is complete. For example, a typo in an agent’s name in the CSV upload will lead to the creation of duplicate agents, or a typo in the team name will result in an error. If there is an error, they need to go through the process of user sync again.

2. Customers need to reach out to OAI to do any bulk updates. This is time consuming and tedious.

Potential solutions

1. Enable a self-serve bulk update capability within the platform with error handling and communication.

Ingestion

Key insights

1. OAI already does some level of automation during the agent ingestion process.
2. Most customers are happy with this arrangement.
3. However, there are some edge cases where customers want to add agents manually, e.g., acquiring a company.

Pain points

1. Merging agents is a problem. If there are any differences between the agent name or metadata, a new profile gets created.
2. There is no way to identify mistakes and errors until the process of ingestion is complete.

Potential solutions

1. Provide visibility into the ingestion process. Allow users to confirm before ingestion starts.
2. Build proactive error handing and communication during ingestion process.

Transformation and mapping

“the process, I have is they send me all these teams, based on their latest one and I have to first take this list. Make it into a unique list and then compare it to all the teams that we had in the system today to find which of those are missing, and then create all the missing ones, and then be able to do this and that's why it's so arduous.”

“generally most customers would least expect that you have like a user file exchange process that do this automatically.”

There is always a delay in the mapping between Workday (user roster software) and OAI.

Key insights

1. A contact center is a dynamic environment in which there is a high turnover and a constant movement of agents across teams and in and out of the company. Agents can move on a weekly basis. However, this change does not reflect immediately on OAI.
2. There is often a time lag of a week between the team structure on OAI and the ground reality of the customer’s company.
3. Different customers have different applications for managing user rosters. In some cases, one customer can have multiple user roster applications.
    a. Workday is the most common user roster application.
    b. Other applications include Sailpoint, SAP successfactors, uJet
    c. Some users also use Verint as a source of truth for user information.
4. Transforming their org structure from their user roster application to OAI teams is a large pain point. Automating this transformation might be a big painkiller.
5. Some customers have built internal tools to do this transformation.

Pain points

1. Transforming their org structure from their user roster application and mapping it to OAI teams is a large pain point.

Potential solutions

1. Integrations to transform user and team information from user roster applications to OAI.

API

Key insights

1. Building full automation for user management will require OAI to access APIs from customers user roster applications.
2. While customers are eager to automate, they are hesitant in providing this API access, citing security concerns.
3. Even their internal developers don't get access. Someone manually exports an XML with specific information for internal devs.
4. Some customers have built internal tools using APIs mainly for automating parts of user management like mapping users to teams.
5. One customer tried to use Verint's API but it was not successful.
6. They prefer to push data rather than us pulling data from their user roster applications at this point. Most users are looking for endpoint from our side to push data.

Pain points

1. While exposing APIs is not difficult, customers have major concerns about data security when exposing APIs.

Potential solutions

1. Enable a secure API with appropriate measures to assuage concerns around data security.

Other

Following are some smaller buckets that emerged out of the research. While these are not pressing issues, these can be explored further in the future.

Notifications

"If there was a group or a notification or something when new users were created so that we could just go work"

1. There is a use case for notifying admins when users are added or updated on OAI. However, this is not a deal breaker.
2. Customers sometimes need to be notified about team changes on OAI. However, this type of communication happens outside OAI.
3. There might be cases like ingestion completion which OAI can inform users about.

Search and filter

You can't search by the ID of user. You can only search by name. This is especially problematic when there are multiple users with the same name.

1. Search and filtering capabilities for user management need to be improved.
2. Currently, search is limited to name search. However, this is a mild pain point.
3. Finding and managing multiple users is a pain point.

Log of changes, success/failure

"if I had to say what is ideal, it would be that we have a system in place. Where we both be able to track historically results, so that even if Dan don't then leaves as a manager in the future if I want to filter back down to Dan don't end results I could see his results from whenever he wasn't employee At block, but then going forward right he's no longer a manager and maybe now it's brandi it should be correct that way going forward."

1. Some customers brought up a need for history or a changelog of user management.
2. There is no way of seeing a change in mapping i.e. these agents are with this team now.
3. Customers sometimes need to be notified about team changes on OAI.
4. Some users feel that tracking the history of agent updates is not relevant within OAI.
5. Some users want to figure out turnover of agents using changelog information.
6. Some users requested a success/failure log of users and calls ingested. They mainly need this to troubleshoot ingestion issues.
7. While these have not come up as a large paint point/requirement, we should deep dive into this in the future.

Security and SSO

1. Some users expect SSO process to enable user management. However, there is no clear mental model of this relationship.

Questions, feedback or comments on this report?

Reach out to Akshay Kore