Usability and heuristic analysis - Advanced moment builder

Usability evaluation

Goal of the exercise is to evaluate the usability and intuitiveness of the proposed mechanisms for building advanced moments.

Target user characteristics

1. Users understand the concept of moments.
2. Users are involved with building moments.

Reference document:

1. Advanced moment builder - design doc
2. Figma: Link to design files

Protocol

1. Users will be asked to complete the task of building a keyphrase-based advanced moment with AND logic.
2. In order to reduce the curse of knowledge bias, each user will be shown a prototype in a different order.
3. The interviewer will use a think-aloud methodology to conduct the evaluation.
4. Shadow and observe.
5. Don't nudge users or ask leading questions.
6. Finish interview with open-ended, probing questions on what they think of the proposal and its usefulness. Ask questions on the visibility of team settings.

What are we measuring?

1. Measure time taken to understand the mental model for signal components and logic-based operators.
2. Measure the understandability of the interface.

Success metrics

1. It takes <30 secs to identify the correct action
2. It takes <1 min to understand the mental model of operators and signal components.

Pitfalls to avoid

1. Don't nudge or lead the user into completing the task. Prompt only in cases where they are completely stuck and the task is unsuccessful. This is at the discretion of the interviewer.

Evaluations and results

Lisa

Observe CSM

Recording:
https://observe-ai.zoom.us/rec/share/4SU_F7SRF-7u5nNhTWfjBJM6NYYIZ79PBBOd-SOhqLPI
AjJiFlevYEAagIpPDta9.U8he0P6S9beU-ncG
Passcode: K5%1J*n7

Summary of notes:

1. The new signals box felt like a new moment.
2. In the case of mono calls, there should be no option for speaker selection. [Actionable]
3. The user preferred a vertical orientation for arranging signal blocks instead of the horizontal one. The user felt that a vertical orientation aligns closely to the current way of moment building.
4. However, we could not gauge any usability concerns with the horizontal orientation.
5. The user suggested an option to minimise the signal group.
6. The user raised a concern on how moments with multiple signal-speaker configurations would appear on the moment manager. [Actionable]
7. There was some difficulty understanding AND/OR logic initially. We might need to focus on explaining what these mean and how it translates to moments.

Eric

Observe CSM

Recording:
https://observe-ai.zoom.us/rec/share/iLnJdRzjNQVea2DP8KdZb0-t3nnXu92EPUSI0S60zhLkT1YUG_gttGIQe78kDbvi.FZXqtpq0k7o_u6cg
Passcode: &h6wS^C1

"The math of the moment"

Summary of notes:

1. The user found the core experience of adding operators intuitive.
2. The user was confused about what 'location' meant. Suggested 'timing' as a better word.
3. The version of this prototype had checkboxes. Having checkboxes felt heavy and confusing. The user mentioned that they clicked these checkboxes out of habit.
4. They said that Boolean is something that is commonly understood. They had no difficulty in understanding the AND/OR logic.
5. There should be a way to get realtime visual feedback for the output. (1 + 1 = what?)
6. The mental model for the builder UI was of an equation. This is the 'Math of the moment'
7. We have shown the LHS of this equation but not the RHS.
8. Feedback in the form of a preview could complete the equation.
9. Seeing legend components could also complete the equation.
10. Not having a summary view in the form of preview or legend can cause confusion. The equation is not complete.
11. Moving teams to settings was not a concern.
12. Clients have previously asked them for timing/location properties.
13. Suggestion: Wizard-like UI from for moment building. Like few simple pieces of paper.
14. Showing the location/timing within signal groups might not be as complex.
15. The user found the Import keyphrases functionality particularly useful. They said that entering keyphrases is a frustrating activity.
16. Suggestion: Import keyphrases from CSV.
17. A library of keyphrases would be very useful. Often moment builders don't know where to start from.

Rob

Observe Onboarding Manager

Recording:
Passcode: 409vqyU+

Summary of notes:

1. User found the 'Location' terminology a confusing. The related it to a physical location.
2. 'Entire interaction' within location was confusing. Will need to be explained.
3. User understands AND/OR logic operators.
4. The user was not aware that current moment builder keyphrases have an OR operator by default.
5. On adding a new moment, the user did not notice a major difference in the interface. They liked the placement of 'Type' and 'Speaker' in the block.
6. On clicking on '+' they felt that other phrases would be recommended to them. The new block felt like a recommendation.
7. New block as an autosuggest based on the previous block.
8. Location option per line could be helpful in some cases.
9. When adding a new operator, it would be helpful if we could suggest phrases in a new block.
10. The user felt that adding a new operator assigns an order for operations.

Charles

ERC Speech analyst

Recording:
Passcode: VEaaT^H0

Summary of notes:

1. This is an advanced user of moment builder and has an understanding of complex programming logic.
2. Was able to understand the 'Location' dropdown.
3. AND/OR dropdown in the builder was intuitive.
4. Expected nesting of operators. Parentheses.
5. Nesting is an extremely important functionality for this client.
6. Chronology seemed to translate into 'Order of operations'

7. Ability to isolate location on different parts of the call would be useful.
8. Before, After operators would be needed in cases.
9. Need a way to import existing moments. Recreating moments would be really cumbersome.
10. We presented them the import functionality. They found it useful.
11. Precedence would be extremely useful for tracking a sequence of events. Before/After.
12. The client's expectations are advanced functionality.
13. NAND operator is essential.
14. Negative boolean logic is expected (NOT AND - NAND and NOT OR - NOR)

Rahul Pant and Rohit Talwar

Observe Speech analysts

Recording:
https://observe-ai.zoom.us/rec/share/zubZXe_JOUe8VtvMqt75zazCFLrk6y1doiOv5zHB8Vu5Sb
bVl3zTwBpSOBUVke8D.GsZDWGFCg6PiDjpy
Passcode: e?s1=30f

Summary of notes:

1. This is an advanced user of moment builder and has an understanding of complex programming logic.
2. There was confusion when building the moment. Need to probe further.
3. They were able to understand the logic of the UI with AND/OR operators.
4. They thought that the change in UI was not significant.
5. They mentioned the need for location at the block level.
6. Asked if AND/OR logic can be applied at the keyphrase level.
7. If a client is looking at two windows, they can't see all keyphrases.
8. The number of clicks or touchpoints should be as less as possible.
9. Prefers a focused view when adding keyphrases.
10. "My purpose can be satisfied in one block itself"
11. There seems to be an affinity towards a vertical arrangement where all phrases can be seen as a list.
12. The user is comfortable with programming syntax.
13. Three AND operators in a moment are more than enough to get retrieve any sort of context.
14. Logic example: "**C**: Refund my money AND **A**: UPS OR **A**: DHL" where **C**->Customer and **A**->Agent
15. Building a complex logic within the same query.

16. We can use parentheses to 'remove impurities.' Used to build complicated queries. eg. Cancel account NOTIN "don't cancel account"
17. Lexical analyzer helps in building a more accurate moment.
18. They don't use typical queries with parentheses because they want to improve recall values. Parentheses reduce recall.
19. The industry pattern is to go through training to use these tools. Once licenses are bought, a consultant conducts 2-3 week training sessions depending upon the tool.
20. Learning comes by practice.
21. Give a help option for users for reference of how to use the tool/operators.
22. Knowledgebase articles for best practices for building moments with high recall.
23. AND is the most used operator. OR is not used often because it will hamper accuracy. Sometimes they use a NOT-IN operator.
24. Don't want pronouns (a, I, the) to be linked with query. Can we flush those out?
25. If I'm able to flush out phrases from the query, NOT-IN operator
26. Having AND/OR operators with Speaker id would improve our accuracy greatly.
27. AND will be most prominent.
28. 'Avoid terms' option can help to flush out irrelevant calls. Avoid terms can be used for larger queries. For simple logic, they would use a NOT operator.
29. Copy moments is a painpoint that came up.