UX Research Summary and Roadmap

1. UX Research Summary

Including the instructor, we have conducted 3 interviews on our prototype. All these interviews were valuable and reflected essential problems of our design.

Interviewee-1 was asked to perform a few tasks on our 5 sub-pages and he did well on most of them, except that he failed to do some minor operations. When he was completing some tasks on the Campaign Customization and Calling Operations pages. The major mistakes are that he didn't realize the combo format and attempted to add multiple same components into one combo. Besides, he did pretty well in looking for information on these two pages but didn't quite know how to edit/delete them, and he suggested that more detailed text guidance should be on the page.

From the Interviewee-2's interview, we realized that the upload part's functionality is not clearly indicated, thus causing confusion for the user. Similar to Interviewee-1, Interviewee-2 also stuck on campaign combo customization and analytic dashboard tasks. Since these parts are complex and are also the core functionalities of our app, we should implement a tooltip which appears when the user's mouse hover over a certain element. The Interviewee-2 happened to misclick during the interview, it might be helpful to optimize some parts of the detailed layouts.

We also interviewed Julian, and he was able to complete all simple tasks like look for or delete something, but he felt confused about some complex workflow. He had a hard time doing the task in the Campaign Customization page Calling Operation page. He didn't know what P/O/C represented and thought that the campaigning components should be presented in separate pages. He also proposed that a sketch of a state-machine flow chart be made to the user, and a list of explanations to the terminologies in the app.

All interviewees are showing confusion on complex operations, and they are not familiar with some complicated workflows. Analyzing the suggestions from all 3 interviewees, a general viewpoint is that there should be text instructions on those pages, or a flow chart drawing the operational processes of the functionalities. Another point that is worth noting is that, in the Campaign Customization page, each component should be put onto separate pages since it will be hard to scroll to the end of the component cards when there are a huge amount of them.

2. Roadmap Updates Paragraph

What we are going to do:

1. Simplify the campaign customization page, remove that page or split the functions of this page to several pages.
 * Make the instruction and page more intuitive
2. Add more details about on calling operation and dash board
 * description about functionalities for adjustment on analytic page
 * instructions on how to use the calling list or explanation on campaign editing on calling operation page
 * The most viable solution would be either adding text explanations on corresponding places or implementing a tooltip feature which would display some helpful advice while the user hovering his/her mouse over a certain element.
3. Write a flow chart about how each component of our software coordinates.

Paragraph:

All of our interviewees have shown confusion about core functionalities such as campaign editing. They indicated that this app is somewhat complicated to use and hard to learn. This is the reason why we will be focusing on simplifying our functionality while keeping the core marketing science part, which is customer discovery. Furthermore, we will also add more details to the pages to indicate the usage of different elements to help users solve their tasks easier and master this app faster.

We have already completed the prototype of our web app, even though most completed parts are front-end, it can display the basic functionalities already. We've also added CI tests to make sure the newly pushed changes do not break the integrity of the whole app, which may lead to a mess later if we can't detect it on time. We've also managed to solve some issues about using MySql database along with Django.