# Research

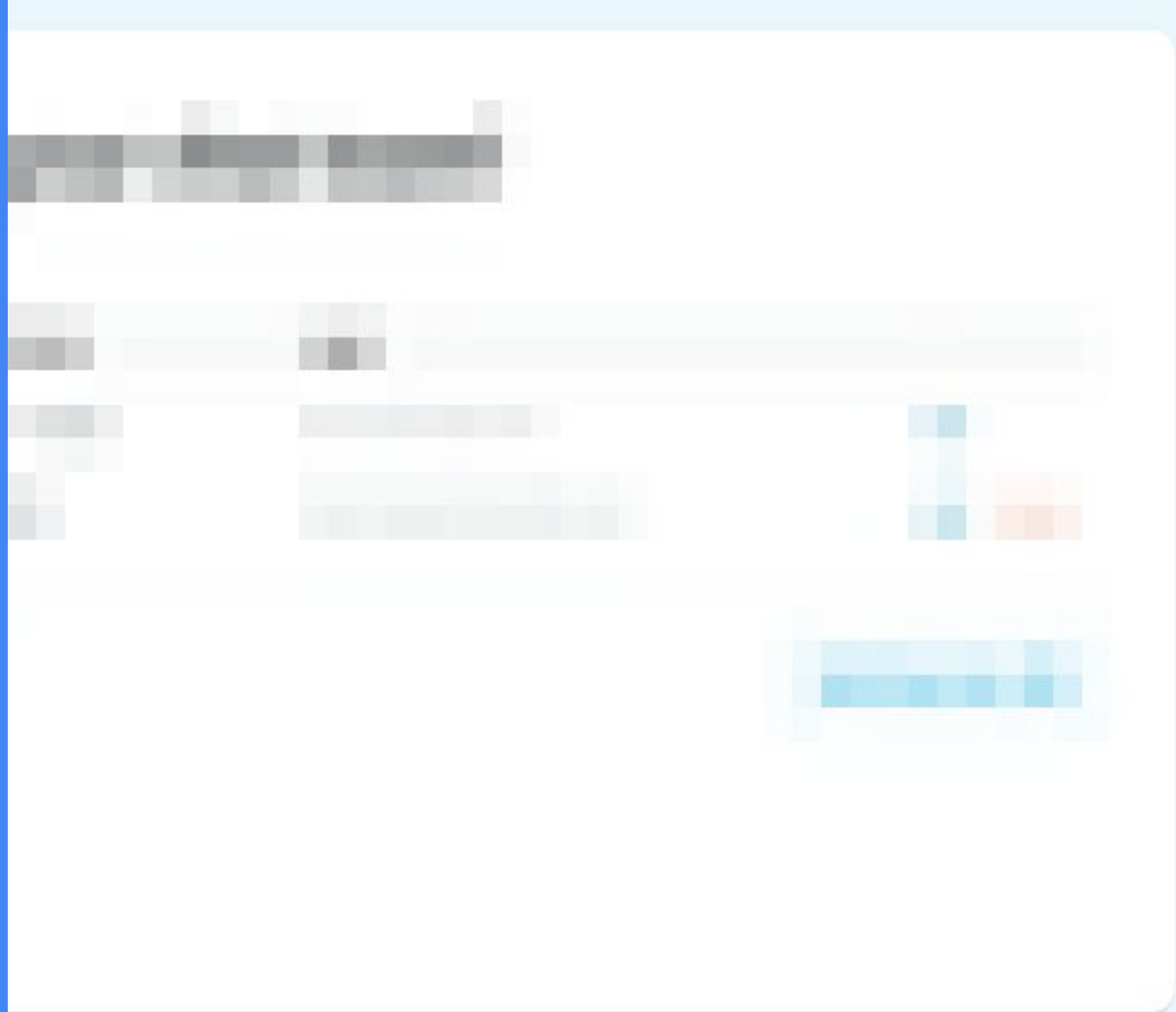# Research

**Review current workflow**

Ask clarifying questions

Review workflow again

Analyze similar applications

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Review current workflow

**Ask clarifying questions**

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- What's the goal of this test? To raise awareness of the Operator functionality, to get more operator signups? To raise awareness for the group functionality?

- What issues or pain points do you and your customers currently have with the operator interface?

- For Olark, what's the benefit of account owners adding more operators? I notice the plans differentiate by operators, but do you also find that accounts with one or more operator have a higher lifetime value?

- For account owners, what's the benefit of adding an operator?

- Does the account owner get prompted at any point to add operators?

- It's my understanding that the "routing" doesn't happen when creating a group, but done in code? If i have this assumption correct, why? Does Olark have any functional limitations as to why the "routing" of where a chat would appear for that group could happen based on URL or some other more visual method, versus applying it in code?
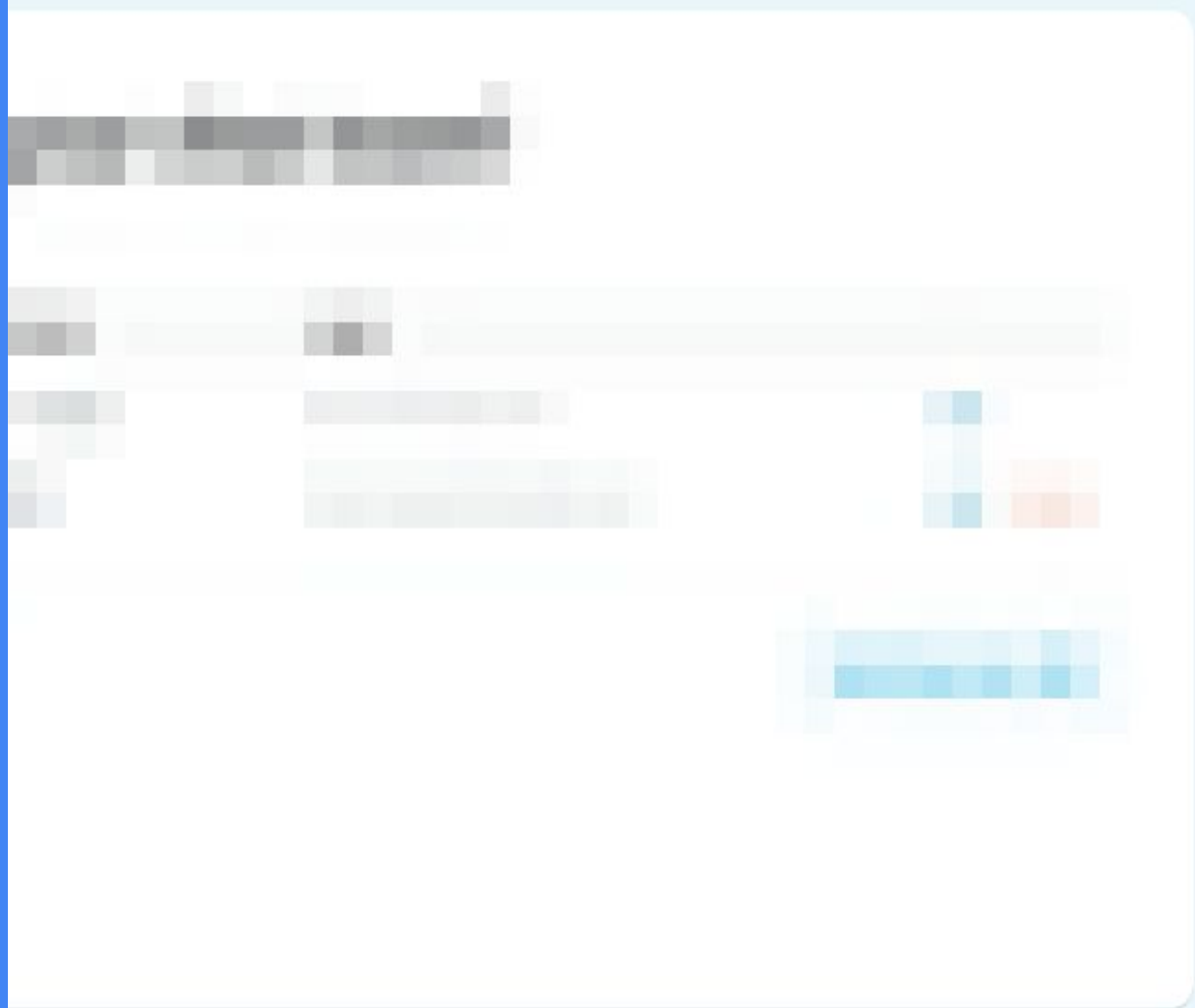
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The operator onboarding process often suffered from multiple actions with a shared hierarchy

**All Operators**

Groups

New Group

Test group

New Group

New Group

Create Group

# Build your chat team!

Add to Group ⇕

| ☐ | Display Name | Login | | |
|---|---|---|---|---|
| ☐ | Ben Kutil  offline | ben-kutil@olark.com | Edit | |
| ☐ | Ben  offline | thisis-b1aa16c7fc@olark.com | Edit | Delete |

**no opportunity to customize groups**

**no communication of the value of groups**

Add Operator (8)

The group functionality seemed glued on to the operator capability.

**All Operators**

**Groups**

New Group

Test group

New Group

New Group

New Group

**Create Group**

*no name field?*

# Invite an Operator

**Email address**

**Which Groups should they belong to?**

☐ New Group  ☐ Test group  ☐ New Group

☐ New Group  ☐ New Group

*missed opportunity to add new group*

**Privileges**

Admin ▲▼

**Invite**

*takes admin out of invite flow*

Adding an operator one at a time was slow, and adding a new group would take me out of the workflow.

**no standard editing interface**

All Operators

**Delete Group**

New Group ✏️

Groups

New Group

Test group

**New Group**

New Group

Place the following code on a page (under your Olark snippet) to send chats to this group:

```
<script> olark.configure('system.group', 'd60ca3db21ffdfc5237e28c0befd44f6'); /*Routes to New Group*/ </script>
```

**Create Group**

**technical**

Display Name

Login

**twice the operators**

This group is empty! Quick,

**Add some operators!**

**Need More Operators?**

**Add Operator (8)**

**could be presented contextually**

Editing a "new" group introduced an interface with many actions competing for my attention.

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Review workflow again

**Analyze similar applications**

While reviewing the Operator workflow, I came up with a series of web applications with similar components or features.

- Slack
- Hipchat
- Intercom
- Uservoice
- Helpscout
- Desk.com
- Customer.io

I tried to find in each of those applications a workflow similar to the operator onboarding.

I've included some screenshots of things I found important or thought useful.

# Teams



Teams allow you and your teammates to easily manage your incoming conversations and workflow by organizing your Intercom inbox to mirror how you and your teammates work in the real world.

**+ Create Team**

Intercom explains the value of "Teams" during the creation process. I found this useful.

Test Team

🔍 Search to add a team member...

Intercom allows you to add team members during the "Team" creation process. I thought this was important.

New **full members** will automatically join **#general** and **#random**   edit / add

**Email Address**

name@domain.com

**First Name**

(optional)

**Last Name**

(optional)

**+ Add another**

Big team to invite? Invite many people at once.

Make your invites a little bit more personal by writing a **custom message**.

Slack provided single or multiple invites easy.

Who else will use this mailbox?

Add anyone that needs to view or reply to conversations here.

Ben Kutil

ben@make-things.com

Account Owner

Full Name

Email

User

Send an Invite

Add another User

Back    Next Step

Helpscout also had a way to add multiple people.