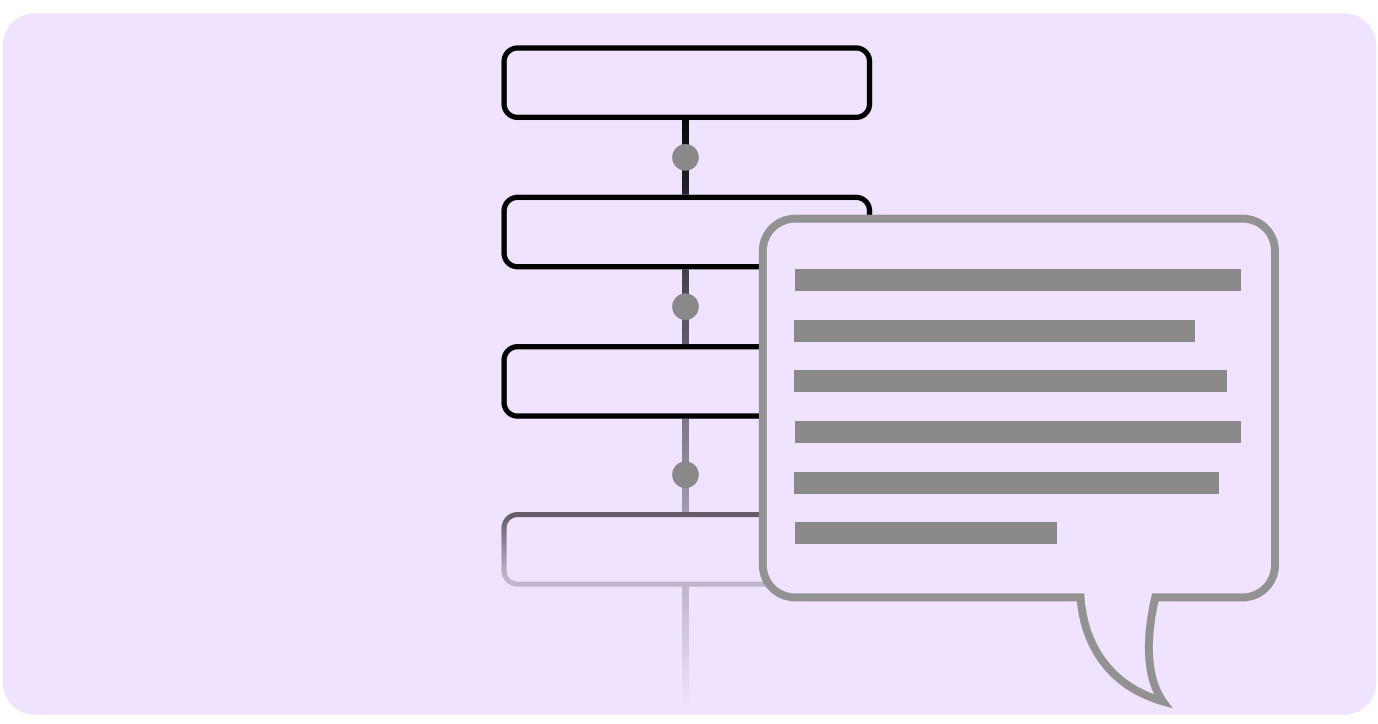
CONTEXTUAL SUGGESTIONS

Enhancing the user experience with proactive guidance



Overview

Contextual suggestions enhance user experience by providing proactive, relevant recommendations based on the current context of the user's actions. Within Nintex, contextual suggestions can improve the efficiency of workflows, suggest how to automate repetitive tasks, and provide users with the guidance they need to utilise our platform effectively. This interaction pattern helps us to provide timely, actionable advice to our users without them needing to search for it.

Common Issues
Users may struggle with discovering features or best practices that can improve the assets they’re creating, leading to inefficiencies and underutilisation of the platform's capabilities. Without contextual assistance, users may feel overwhelmed or unsure about the next steps, particularly when designing complex workflows and processes. Additionally, a lack of proactive guidance can result in errors or suboptimal use of the platform, increasing the time and effort required to complete tasks.

Solution

We can implement contextual suggestions to provide users with timely and relevant guidance, improving their overall experience with our platform. By understanding the user's current actions and the context of their tasks, we can offer recommendations that are immediately useful and applicable, such as:

Feature discovery and utilisation

By analysing user behaviour, we can identify opportunities to introduce users to features that can enhance their workflows. For example, if a user is designing a form, we might suggest advanced formatting options or data validation techniques. These suggestions help users discover and utilise features they might not be aware of, maximising the value they get from the Nintex platform.

Guidance on best practices

Contextual suggestions can provide users with best practices for building efficient workflows and automations. For instance, if a user is creating a complex workflow, we can suggest optimising steps or using pre-built templates that align with industry standards. This guidance helps users create more effective and reliable workflows, reducing errors and improving efficiency.

User training and onboarding

Contextual suggestions are invaluable for new users learning to navigate the Nintex platform. By providing step-by-step guidance and tips as they explore features, we can accelerate their learning curve and improve their confidence in using the platform effectively.

Principles

Relevance

- Ensure suggestions are highly relevant to the user's current task.
- Use user data and context (e.g., current page, recent actions, user preferences) to tailor suggestions.

Timeliness

- Deliver suggestions at the right moment, without interrupting the user's flow.
- Avoid overloading the user with too many suggestions at once.

Clarity

- Make suggestions clear and easy to understand.
- Use concise language and avoid technical jargon unless it’s appropriate for the user's level.

Actionability

- Ensure each suggestion includes a clear call to action.
- Provide options to accept, reject, or learn more about the suggestion.

User control

- Allow users to easily dismiss or ignore suggestions.
- Enable users to customise the frequency and type of suggestions they receive.

Implementation Guidelines

Understanding context

- Leverage data to analyse user behaviour, task patterns, and workflow context.
- Continuously update the context model based on real-time user interactions.

Designing the suggestion interface

- Placement: Position suggestions in a non-intrusive area, such as a sidebar or a pop-up that appears near relevant UI elements.
- Visibility: Ensure suggestions are noticeable but not disruptive. Use subtle animations or highlights to draw attention when necessary.
- Information Architecture: Group suggestions logically. For example, categorise them by task relevance, urgency, or type of action.

Crafting the suggestions

- Use natural language to frame suggestions.
- Personalise suggestions using the user’s name and contextual data.
- Include icons or visuals to make suggestions more engaging and easier to process.

Interaction design

- Provide buttons or links for users to take immediate action on suggestions (e.g., “Apply”, “Learn More”, “Dismiss”).
- Use tooltips or brief explanations to clarify why a suggestion is being made.
- Allow users to provide feedback on the usefulness of suggestions to refine future recommendations.

Feedback and iteration

- Implement mechanisms for users to rate or comment on suggestions.
- Regularly review user feedback to improve the relevance and quality of suggestions.
- Update the AI models and suggestion algorithms based on user feedback and new data insights.

Example scenarios

Form design

- **Context:** The user is designing a form in Nintex Forms.
- **Suggestion:** “Consider adding a validation rule to the email field to ensure correct email format.”
- **Action:** Options to “Add Validation Rule”, “Learn More”, or “Dismiss”.

Workflow automation

- **Context:** The user is setting up a workflow in Nintex Workflow Cloud.
- **Suggestion:** “You might want to include a conditional branch here to handle different approval levels.”
- **Action:** Options to “Add Conditional Branch”, “Learn More”, or “Dismiss”.

Document generation

- **Context:** The user is configuring a document generation template.
- **Suggestion:** “Including a dynamic table can help organise data more effectively.”
- **Action:** Options to “Add Dynamic Table”, “Learn More”, or “Dismiss”.