**INTERVIEW SUMMARY**

*Conducted on 10/8/2024 11:00 am EST | Level: Manager*

Interviewee valued four main aspects above all for a shift managing application:

1. The functionality of the system, more specifically the ability to automate the creation of a schedule, given a set of conditions (ex: schedule preferences, seniority hierarchy).
2. The ability and freedom to tweak the schedule outside of the system’s pre-created one
3. The ease in finding and obtaining any information regarding wages, shifts, hours, etc. for any specific employee(s)
4. The ease in obtaining support, help, or documentation for any task

Interview touched upon a few aspects that he felt weren’t important to him, but that could be important to other managers:

1. A built in messaging system that allows for ease of communication between the manager and employees
2. The ability to have cross platform support (i.e mobile integration/support)

**Pros to When2Work**:

* The functionality of the website works well in accomplishing the goal of the manager
* Application saves a lot of time when compared to completing the task manually
* The freedom and ability to gain any specific type of information rather quickly

**Cons to When2Work**:

* The steep learning curve to being able to use the website on a functional level
* Website has a lot of features that, while the manager could see the usage for, they didn’t use or require for their specific needs
* The website could use better work in emphasizing the aspects that require the user’s focus
* The way to find help, support, and documentation is not obvious, and the site with the documentation is too large and difficult to find the specific task they want to accomplish
  + *It feels inconvenient to find how to make things more convenient.*
  + The manager never figured out how to use the application through the application, but had to learn it from word of mouth/peers

*[SCROLL FOR FULL INTERVIEW*]

**Interview Questions**

**Preliminary Questions**

* Have you worked a full-time or part-time job before?
  + *Told professional job, said hours, worked those hours, small team*
  + *3 people, time cards and time sheets*
  + If so, what system or method did your organization use to manage shifts?
    - How was your experience using that system/method?
      * Occasionally missed timelines
    - What did you like about that system?
    - What did you dislike about that system?
      * *What would you have liked that system to have done differently?*
        + A mistake would always talk to HR
* If you were to use a shift managing application again (or for the first time) as a manager, what functions would you expect that software to have?
  + Rank those functions in order of importance
    - Different perspectives and views -> versatility
    - Pull statistics very easily
    - Being able to allow people to describe times they would like to work
      * Availability; a lot better than paper sheets
    - Automatically tell + notify things (remove manual work)
    - Rankings in work times
    - Messaging not used, but should; great feature only problem
      * Sends an email, which converts to a text, users and employees have too (see recording 11:04)
      * Easier way to convert message over text
    - Good functionality of w2w: Autofill
      * Before: month and a half, now month and a half but changes are a lot smaller,
      * Autofill: everyone puts in availability, algorithm autofills for the week, can add priority even amongst employees (seniority)
        + Doesn’t take into consideration: Pairing new people with seniors; functionality not implemented
    - Support and documentation
      * Online support with help
    - **Versatility!!**
    - Different kinds of reports
      * How much are we paying everyone?
      * Merit increase is calculable
        + Helpful for managing budget costs
    - Easy to compare scheduled hours and clocked in time
      * Not a feature, but it would be a lot easier

**Summary (1-5)**

* Versatility
  + 3
* Getting Information
  + 4
* Automization
  + 5 Most important
* Messaging
  + 3
* Support and documentation
  + 4
* Flexibility
* Mobile integration
  + Convenient, 3
  + Different categories of workers (B, D) (Drivers license)
  + Cannot change that in mobile app
  + All browser-based
* On a scale of 1-5 (not important to very important) how important would rank say the following features in terms of importance when using a shift managing application?
  + *These are When2Work currently “functions.” This question seeks to gauge the user importance of each function.*
  + **Functions:**
    - View Your Schedule
    - View Everyone’s Schedule
    - Changing/adjusting your personal/contact information
    - Post your shifts onto the tradeboard
    - View all shifts on the tradeboard
    - See all messages you’ve received/sent
      * *Messages mainly include offers to trade, pick up, and approvals of said offers/trades/pickups*
    - View who’s working right now
    - Post/View the Bulletin
      * *Global board that anyone in the organization can post on. An example is to advertise for a shift that someone wants to drop.*
    - View Staff Members and their contact information
    - Request Time Off
    - Plot out work time preferences
      * *When you can’t work, when you prefer working, when you dislike working, etc.*
* Have you used the software When2Work before?
  + If so, on a scale of 1 to 5 (from not proficient to very proficient), how would you rate your proficiency in When2Work?
    - 3
    - What was your general experience or impression working with the software?
      * Positive experience, taking the time to learn the system, not really intuitive, have to directly tell people how to do stuff, don’t trust people to login and figure things out
      * Fine; could be something better, but also something worse
    - First impressions
      * Making us use it housing and residents used it
      * Not the best relationship between the departments
      * Definite improvement over things before and it did save time
      * Learning curve
        + Someone verbally telling you how to do it
        + Wasn’t aware of the documentation
        + Didn’t poke around

We didn’t work with the company

Strongly implied to use it, not really enticed

Taking time to read documentation takes time

**How easy is it to find documentation?**

* + - Have you encountered any specific errors, issues, or pain points when using this software?
      * It’s not very easy to use, more effort on intuitivity
    - What would you rate your general satisfaction with the software?
      * Pretty good for **my purposes**.
      * Features wish they might have
        + Integration with work time hours databases
        + Make the systems talk to each other
      * 3.75
* On a scale of 1 to 5 (from not proficient to very proficient), how technically proficient are you?
  + Proficient in technology : 3.75
  + <=4

**Pre-Tasks**

* Before you begin the following task, what are your first impressions of this web page?
  + Fine, know the few functions; use the tabs
    - Message dashboard is very cool
    - Usually uses the phone application
  + Design, colors, themes
    - Larger view help and demos

**Tasks**

* Versatility
* Getting Information
  + Time of shifts, but length of the shift
  + Yellow and blue -> Type of position, personal choice
* Automization
* Messaging
* Support

Frustration in trading for users?

BIASED QUESTION SORRY

* Too much information?
* But rather too much information than less
* One person information at one time

**Post-Tasks**

* How was your experience completing the above tasks?
  + Which task was the hardest? Which task was the easiest?
    - **Finding how to do something**.
    - 2 (1- never use again), 2-had the time maybe, just not intuitive
    - A little frustrated and definitely wasting time.
* Was there anything about the system that stood out to you?
  + Positive, negative, neutral, etc.
* What about the system did you think it did particularly well?
* What about the system did you think it did not do particularly well?
* If you’ve used a schedule management system before in a previous job that was not When2Work, how did this experience compare with that previous system?
  + Elaborate further if so.
* App in general is very useful
  + Could be more user friendly and better support
  + Videos are fine but dry and time consuming
  + Overall like, don’t love it, but it gets the job done
    - SubItUp? Integrated time clock
    - Call in from office phone to clock in

**Conclusion**

* Thus concludes the interview.
* Thank them for their time.