

UX Research Report

We interviewed a friend of Zhuoheng and took notes of some of his experience with the app workflow and few pieces of suggestion.

Interview Link:

https://drive.google.com/file/d/1QLgjViGU_qwgc27Dt7Ip1tCmbTGVVZY4/view?usp=sharing

Interviewee Profile - Craig Li

Craig is currently a marketing data analyst at RBC working in the Personal Banking Division. He analyzes the data about product launch and their impacts on client. The products he covers include credit card, mortgage loans, etc.

Scenarios

(1) Supposed there is a csv file in your computer, I want you to browse it and upload the file to the app

The interviewee directly clicked on the Upload button instead of first clicking on the Browse button and then uploading. The interviewee suggested that more uploading details should be given because different divisions in the bank may be familiar with different processes, and a clear instruction may help a lot.

(2) Now in the Analytics Dashboard page, I don't want to see the trends of registration within a year, instead I want to see how it has changed within a specific month, how do you do that?

The interviewee failed to click on the Adjust button to change the a-axis unit. Instead, He pointed out few things. He wanted the title in the upper panel to specify the what product registration rate is being shown, and suggested that the panels could be toggled to hide and show.

(3) Now in the Campaign Customization page, I want to add a new campaign combo.

He randomly clicked on some cards in multiple components and mistakenly thought that it constructed a valid combination of campaign info. But actually for one combo there could only be 1 single Product + Offer + Contents & Placements

(4) I want to add a new Product card.

He mistakenly clicked on the add button to the right of the combos section. But later when he was corrected, he chose the right add button.

(5) I want to know what the last Offer card is like.

He just scrolled the Offers section to the right and found it.

(6) I want to delete the second last card in the Contents & Placements section.

He just hovered to that section, scrolled to the end and correctly clicked on the red button to delete it.

(7) I want to replace the O2 in combo 2 with another Offer.

He first tried selecting the combo index 2 and clicked on the cross button to the right of Combos label, which was wrong. Later he tried clicked on the gear button and scrolled down the list. After the correction, he realized that he could simply clicked on the text to remove it.

(8) Now in the Calling Operations page. Given that he has created campaign combo 4 in the Campaign Customization page, now I want the calls 5, 6, 7 to use the info in combo 4 during the advertising process.

He just clicked on the add button and select the existing unused combo, and clicked on the indices 5, 6, 7 from calling list, then dispatched the tasks.

(9) I want to delete the combo-calls plan indexed 2

He clicked on the combo detail area, which was wrong.

(10) Can you give some recommendations on tasks 3-9? How easy do you think?

The interviewee suggests that there should be text description on the colors of the red/yellow buttons on the Campaign Customization page and how combos are grouped with P+O+C. For the Calling Operations page. Should change the “Calling List” to “Call List”, and there should be text description on what “Recently Added & Complemented” and “Recently Discarded” mean. Besides, he proposed using right click to delete specific combo components or the whole combo. He also mentioned about adding the transaction links to those clients who recently subscribed to the product (I don’t really get what he intends to achieve by this).

(11) Now in the Model Controlls page, how do you think about the design of this page?

He likes the simple design but he suggested that the Machine Learning Workflow Configuration should show highly detailed calling histories including the customer concerns and supervisors solutions, and show the stats of calls (how long for each call, timestamp, etc), and there should be a way to clearly send these info to be used in Campaigning Process Configuration.

General Overview

The interviewee could complete most of the tasks with some minor errors in the operations, but some of the suggestions may seem odd due to his lack of related technical background. We will refer to this result and make further modification on the app.