

2 -- set for a particular scope (e.g. group of agents or whole center) -- for individual “out of adherence” often the case

*** going to pair up with ryan and ask him for styleguide & contracts & fullstory**

Questions for Rachel

1 Can I get access to an account with real data? It’s difficult to tell how it behaves and could have design repercussions.

2 Do these thresholds apply cross-site and permanently? By agent? Do I see how many times an agent has broken the threshold?

3 How do we recommend standards? Are the standards out there? Am I trying to think about the person setting up the system for their business?

4 What do the arrows represent? Looks like change?

5 What cards are planned for the future?

6 When we have thresholds -- we can display things differently— we can use thresholds as extremes and display performance relative to that rather than 100% -- is that within the scope of the project?

7 Where are we editing? In window? In a settings page?

8 Is there a styleguide?

9 Has another person tried to solve this before? What issues did they face?
sales vs support -- two different design challenges

will give me access to reporting but need

kpi = key performance indicator
double sided(??) why
problem: doesn’t switch

THRESHOLD MANAGER

Why is the feature important

- (1) performance thresholds acutely affect business outcomes
- (2) businesses are in different spaces and have different needs ==> need for customization
- (3) making talkdesk feel more like an assistant who can listen to you and respond to your preferences; gives TD another datapoint to tailor experience

Who is target (customers)

Any supervisor in a company using *Talk Desk*

Why does it solve a need

- (1) system for setting thresholds is necessary and currently absent
- (2) needs to be easy for admins to adapt goals to existing team's performance
- (3) not every admin is an expert; needs recommendations
- (4) not everyone is keeping up to date on their dashboard 24/7; warnings need to be clear and apparent -- offer a solution

** per customer we should look at history to understand/calculate potential thresholds

**WRITE MORE. AN ESSAY. FOR
20 MINS. KEEP IT PRIVATE.**

PROJECT OVERVIEW

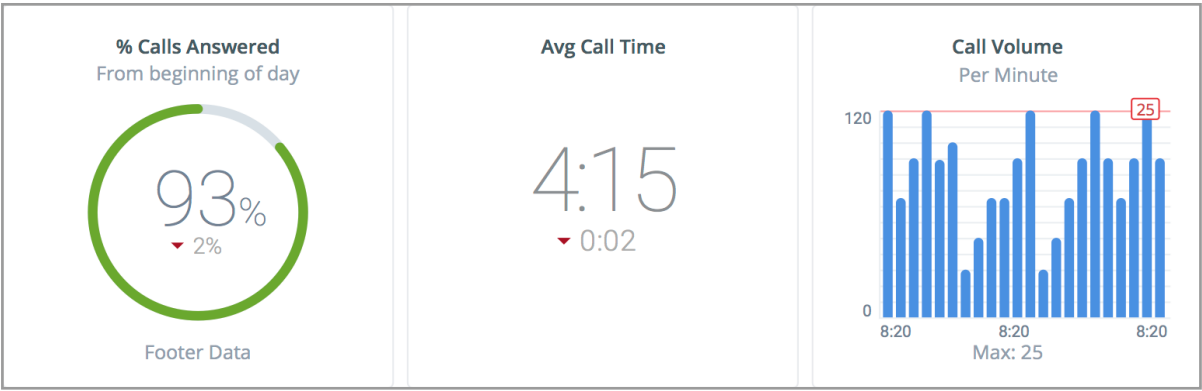
Design Motivation

Before I was given the official assignment brief, I knew very little other than the project was concerned abstractly with the idea of thresholds, and alerts/notifications. Without warning, the following brief appeared in my inbox:

We [TalkDesk] want to provide insights to our supervisors so that they can monitor everything from call volume to agent status. We do this with our Talkdesk Live dashboard where each module can be customized to the supervisors needs. This includes setting performance thresholds.

A performance threshold usually represents a target zone of performance. For example, a supervisor may set a target zone for Avg Wait Time. This is the time a caller will wait on the phone before their call is routed to an available agent. Lets say, in this case, the supervisor wants to be visually alerted any time the average wait time exceeds 10 minutes. This is a simple binary threshold. Anything below 10m is the "good" zone (0m - 10m), anything above (10 < ∞) is "bad". Now lets add more value for the supervisor by adding a third "caution" zone to represent when the metric is approaching "bad" but not quite there yet.

We want to figure out the easiest way for supervisors to customize these thresholds. Don't forget to ask questions as there may be unforeseen requirements. One such challenge would be the direction of the threshold. For Avg Wait Time anything above 10m is bad. But for another metric like Avg Abandonment Time (the average time in which a caller will hangup before the call is answered), anything below 5m might be good.



A few examples of the simple, early-stage visualizations found in TalkDesk's dashboard.

Conceptual Ideation

Where to start?

To further understand such a design problem, I usually start by asking several questions to help add some form to this abstract idea.

Why is this feature important?

- 1 Performance thresholds acutely affect business outcomes of TalkDesk's clients, so if the information presented is unclear, TalkDesk is providing a
- 2 Businesses are in different spaces and have different needs ==> need for customization
- 3 Making TalkDesk feel more like an assistant who can listen to you and respond to your preferences; gives TD another datapoint to tailor experience

Who is the user (customer)?

Any supervisor in a company using Talk Desk.

Why does this solve a need?

- 1 A system for setting thresholds is neccessary yet currently absent from TalkDesk's product.
- 2 The threshold system needs to be easy for admins to adapt goals to existing team's performance.
- 3 Not every admin is an expert, so we should provide contextual recommendations and opportunities to more deeply understand the system.
- 4 Nobody is keeping vigilant 24/7 watch over their dashboard; warnings need to be clear and accompanied with possible solutions.

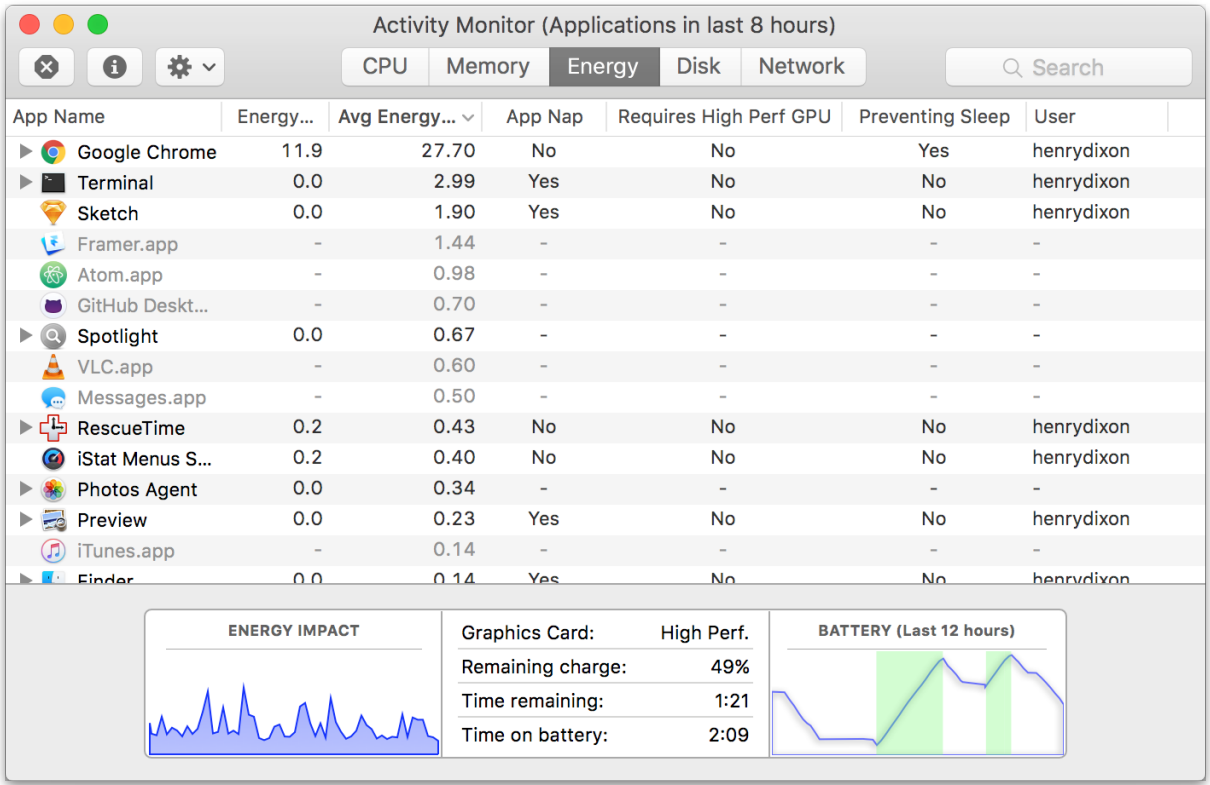
Inspiration & Research

How do other designers solve this problem?

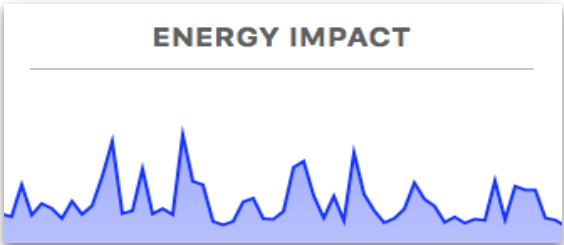
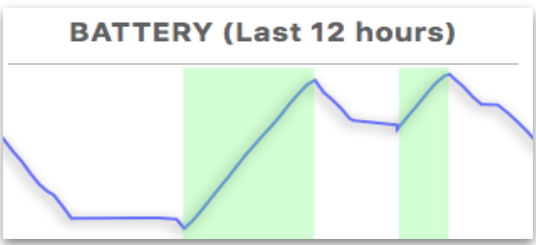
Seeing the way others approached the problem usually leads to a wide variety of solutions, especially if the problem is less prolific. In my research on thresholds and warnings, it quickly became clear the diversity of ways designers approached the same problem. I'll include some ways of addressing the threshold problem below, sorted by which company is responsible for the design pattern.

Apple

Macbook Power & Energy Usage

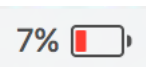


Apple’s *Activity Monitor* is designed to display a lot of data to the user, and its UI is a good example of information hierarchy. Your eyes are drawn to the important, high-level representations of data.

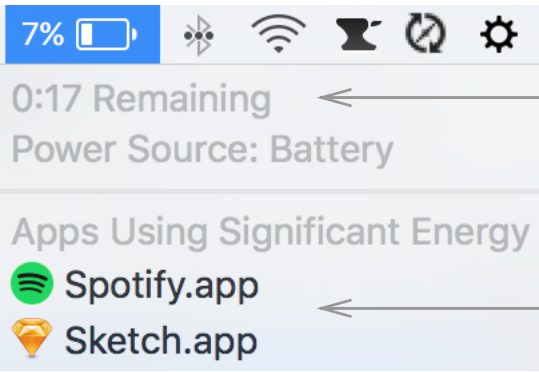


Caution State (and worsening)

Physically slows power consumption (low CPU; low GPU)



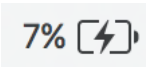
Attention-grabbing color



Information presented in multiple formats

Who/what exactly is causing issue

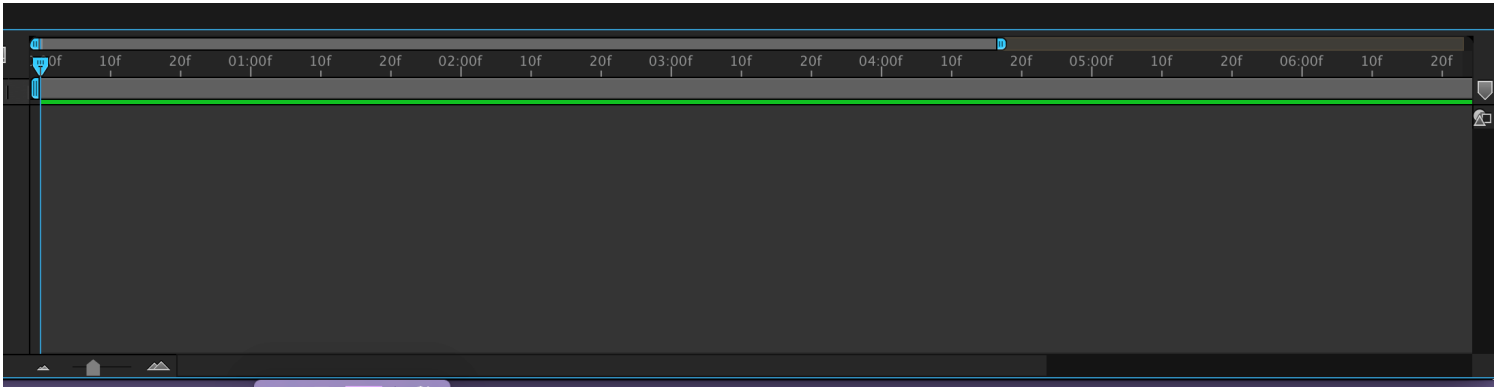
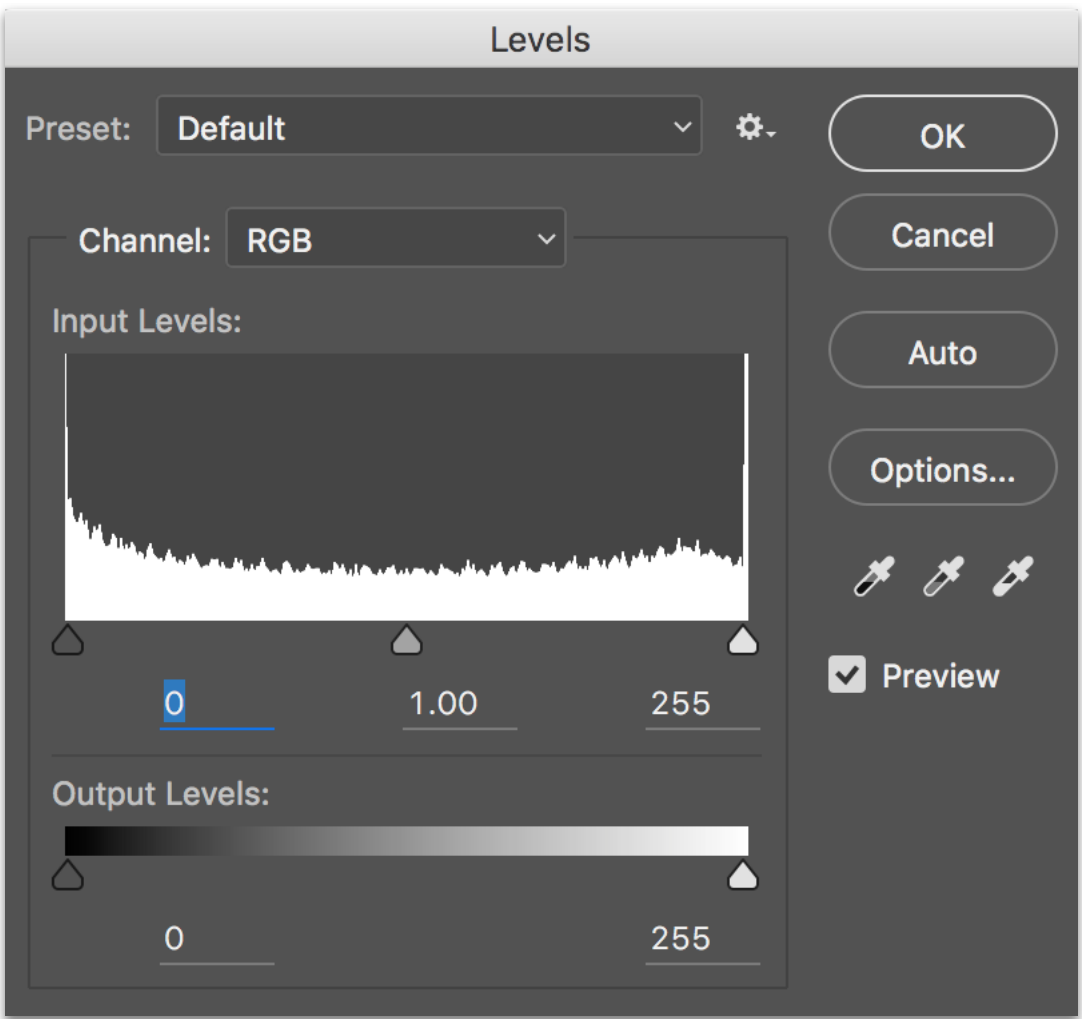
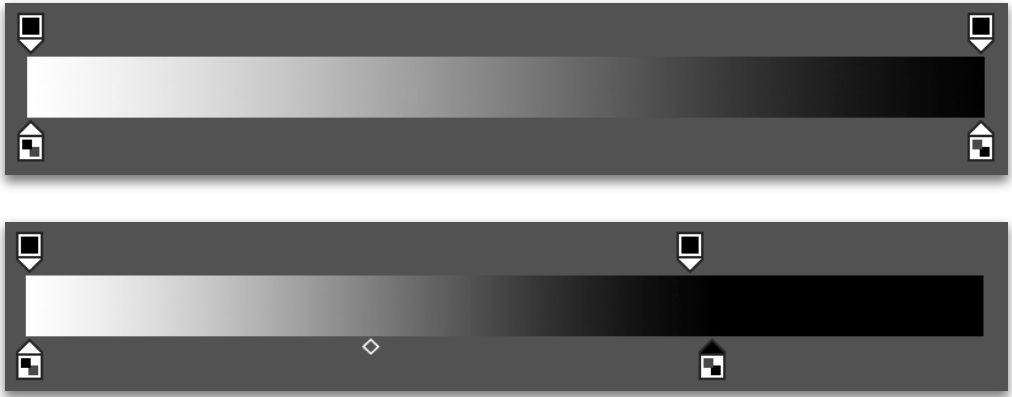
Caution State (and improving)



* Same indicator until fully charged

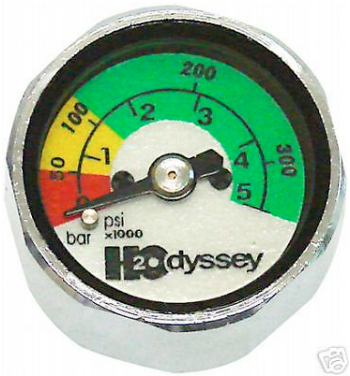
Adobe

Photoshop Levels & Gradients



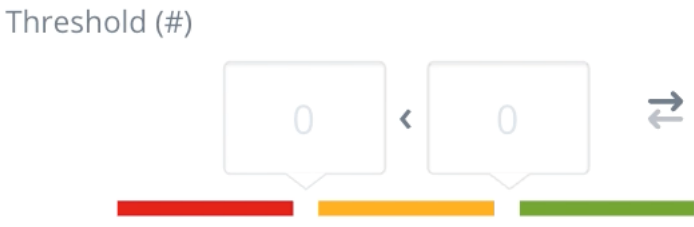
Oxygen Tank

Wanted an analog/real world example



Sketching/Mockups

Current Edit Modal



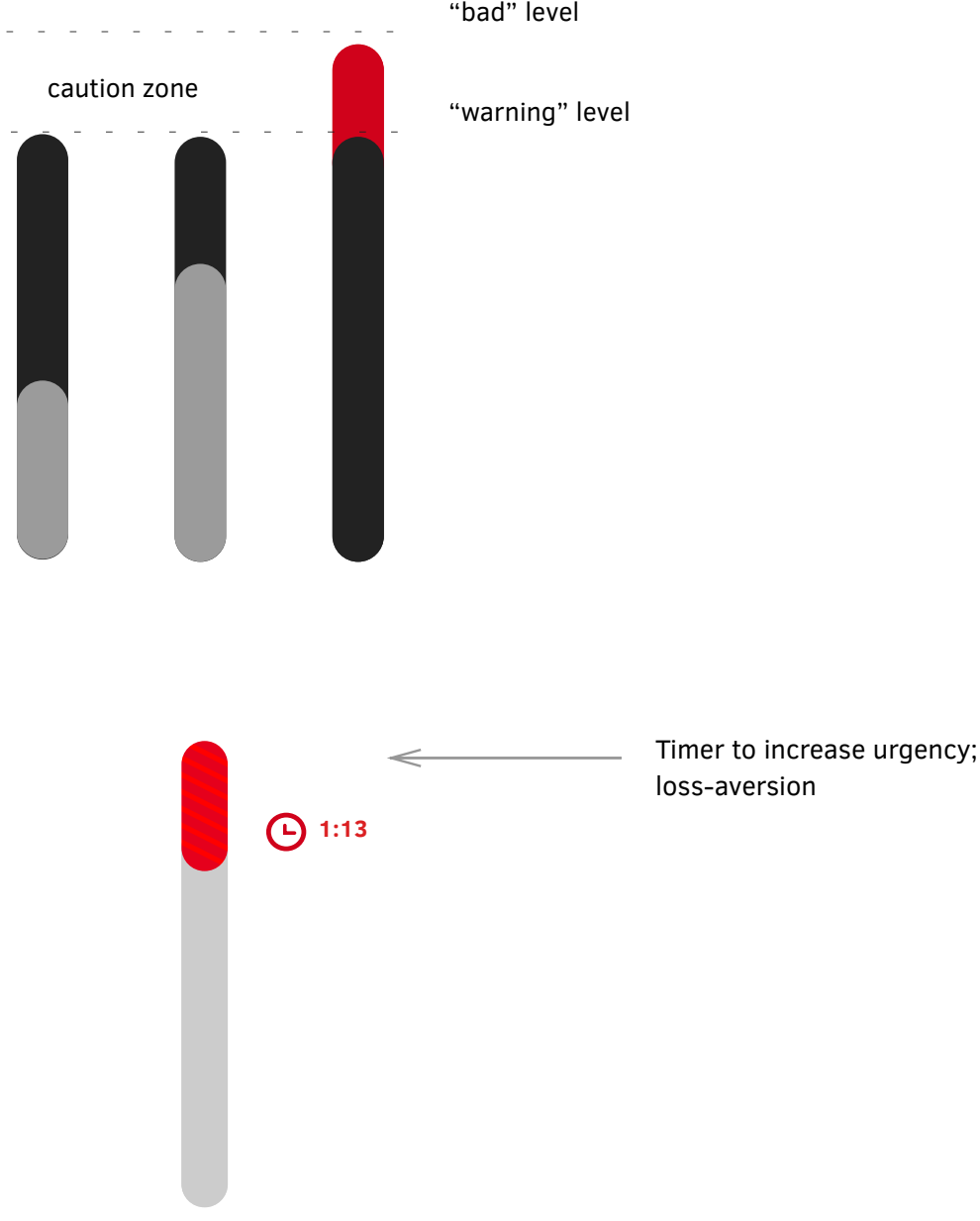
The current threshold system excels in situations where managers have an exact number in their head for an acceptable threshold, but how TalkDesk’s customers are using LIVE suggests the system can be unintuitive.

Currently, if I go to LIVE and look at the Avg. Wait Time metric, I’m given a number without any graphical representation. Without any visual representation, the user lacks obvious context, like a number without a number line.

Instead of just providing a number, we can provide an actual visual representation along with a mental model that allows the person to understand and intuit their performance on a deeper level.

“Invisible Thresholds”

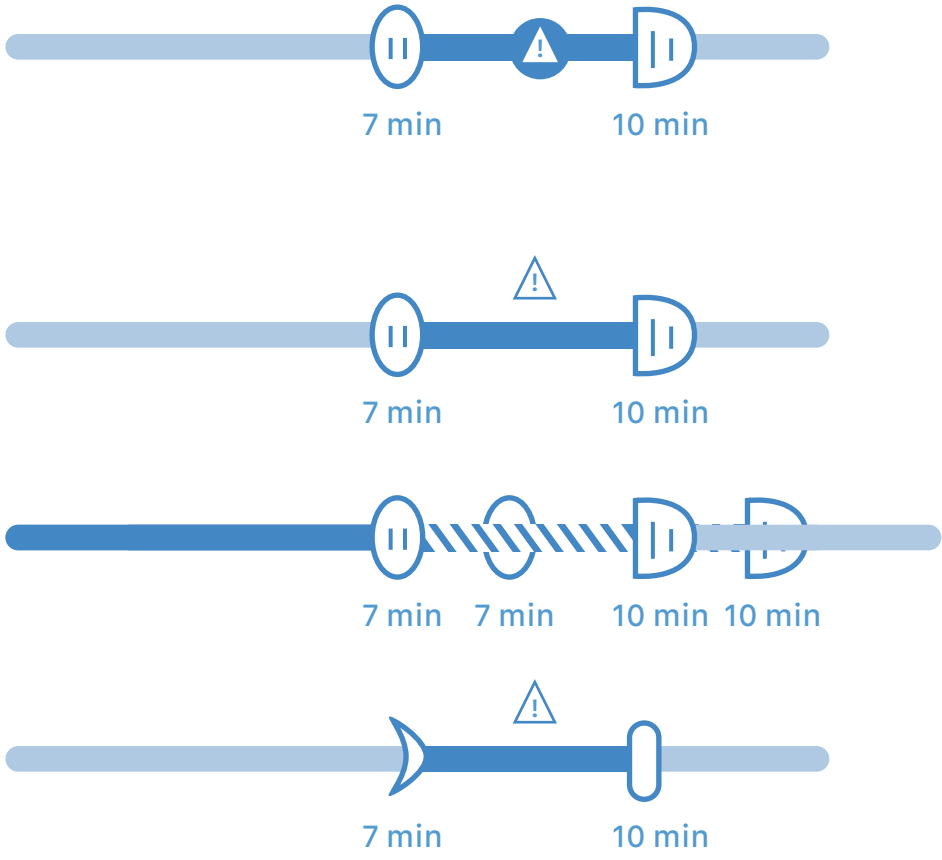
the caution zone is invisible
above the bar, severely discourages
going over



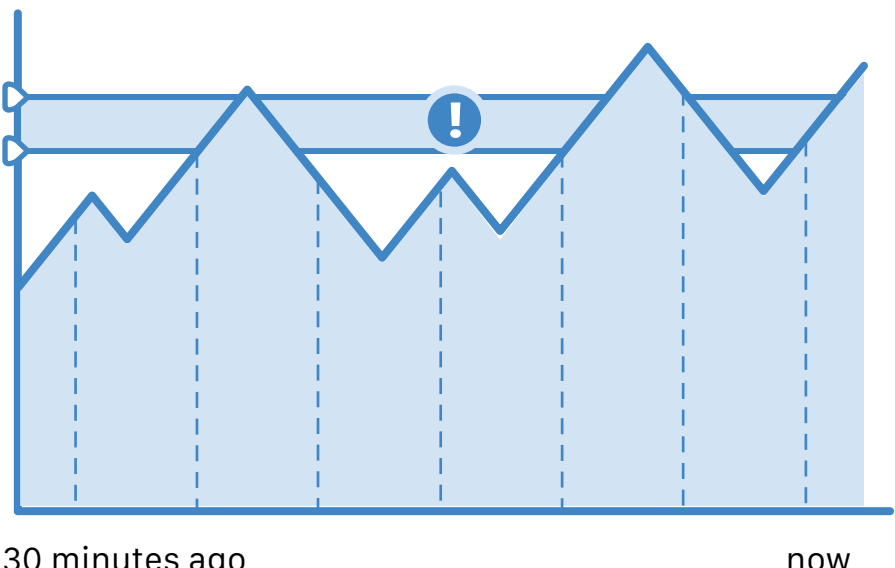
Handles & Warning Indicators



Representing Caution

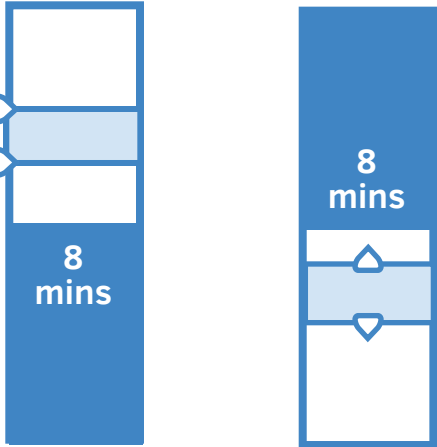


Historic Wait Time



Rather than having the settings hidden away in another pane, we can integrate the visualization and the setting, along with recommended feasible bounds.

Current Wait Time



Adding Context

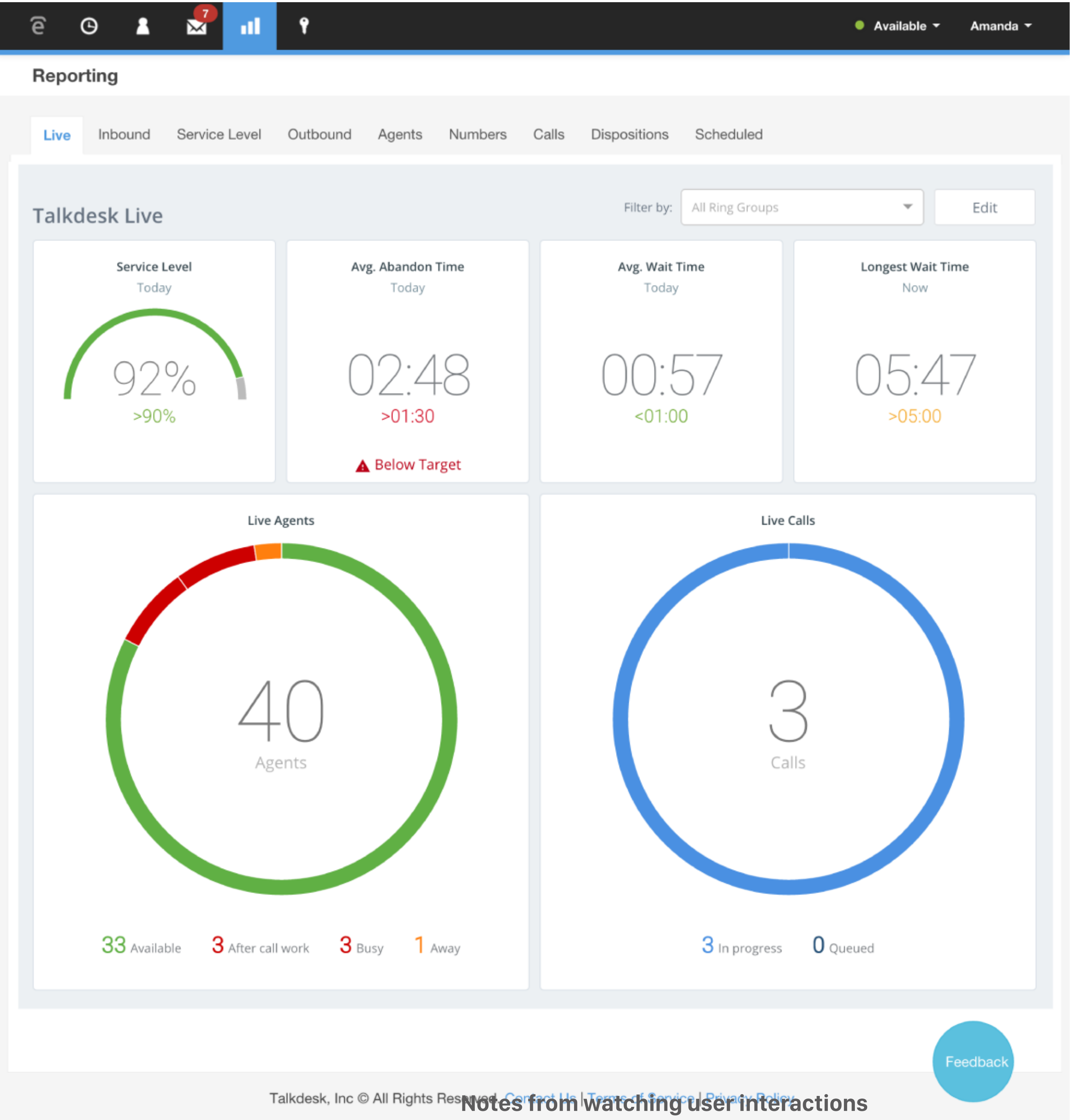
Target-Centric

If the person has a specific target that they’re working towards, we can represent the metric with reference to that target. This is to say, feedback given is always relative to the target.

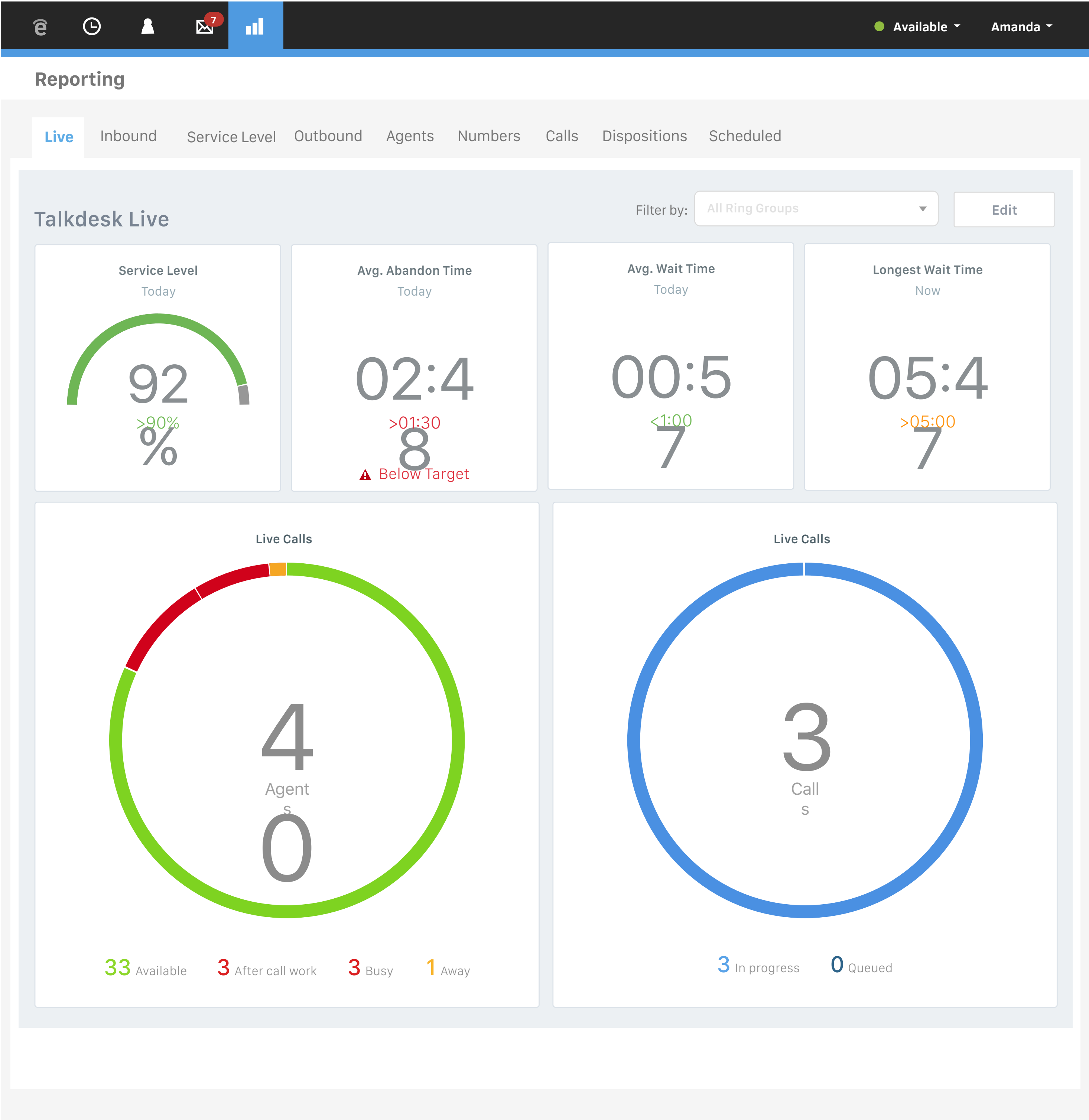


... and it was at this point that the project was abandoned so that the team could work on more “pressing” concerns. Can’t win ‘em all.

Static



Rebuilt



Notes from watching user interactions

- no affordances
- too many choices -- we can decide some things for people
- suggested times
- NO CONTEXT

