



Competitor Analysis

Feature	Tableau	Power BI	Excel Add-ins
Automation	✗ Manual setup required	✓ Built-in anomaly detection	✗ Mostly manual
Ease of use	Requires formulas	✓ User-friendly UI	Requires stat knowledge
Visualization	✓ Custom visualizations	✓ Integrated anomaly charts	Basic charts & add-ons
Explanation	✗ No automatic insights	✓ AI-driven explanations	✗ None
Customization	✓ Flexible (manual)	✓ Adjustable sensitivity	✓ Add-ons offer options
Integration	✓ Works with BI tools	✓ Seamless in Microsoft	✓ Widely used but limited AI



What is your current role or job title?

How often do you work with spreadsheet data (Excel, Google Sheets, Workiva, etc.)?

- Daily
- A few times a week
- Occasionally
- Rarely
- Never

How comfortable are you analyzing data in spreadsheets?

- Extremely uncomfortable
- Somewhat uncomfortable
- Neither comfortable nor uncomfortable
- Somewhat comfortable
- Extremely comfortable

Have you ever encountered incorrect or unusual data in a spreadsheet?

- Yes
- Maybe
- No
- I'm not sure

How do you notice something is “off” or unexpected in your data? (Check all that apply)

- I manually scan the data
- I use formulas or conditional formatting
- A teammate or reviewer points it out
- Visualizations help me see trends
- Other

What kinds of anomalies or mistakes concern you the most?
(e.g. unexpected spikes/drops, duplicate values, missing data, etc.)

What would help you feel more confident that your spreadsheet data is accurate? (e.g. better validation, AI assistance, manual cross-checking, etc.)

If an AI tool highlighted an unusual data point, what kind of explanation would you want?

- A brief summary in plain English
- A chart or visual comparison
- Technical stats (standard deviation, z-score, etc.)
- A suggested action or next step
- Other

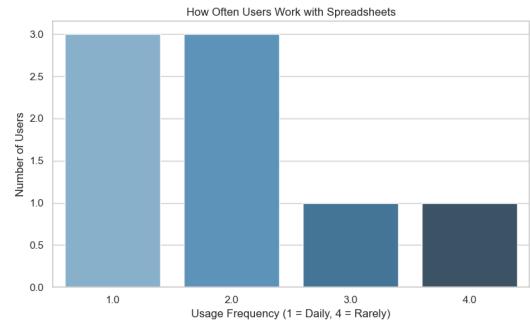
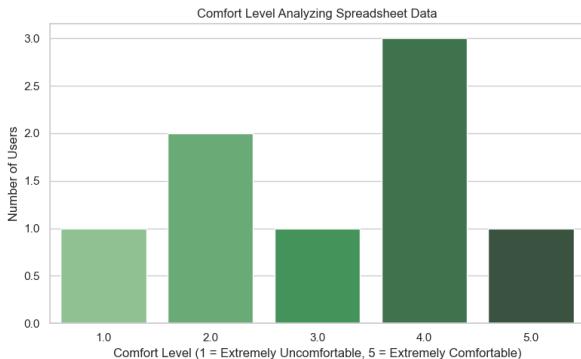
Would you trust an AI to highlight possible mistakes in your spreadsheet data? Why or why not?

How important is it that you can dismiss or override an AI's suggestion?

- Not at all important
- Slightly important
- Moderately important
- Very important
- Extremely important

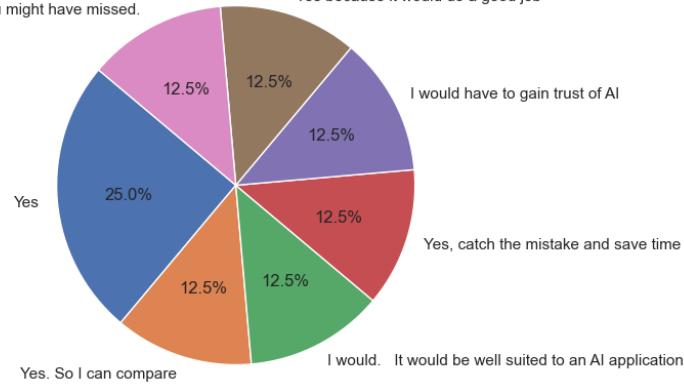
What frustrates you the most when working with large spreadsheets?

If a tool could magically solve one problem in your spreadsheet workflow, what would it be?

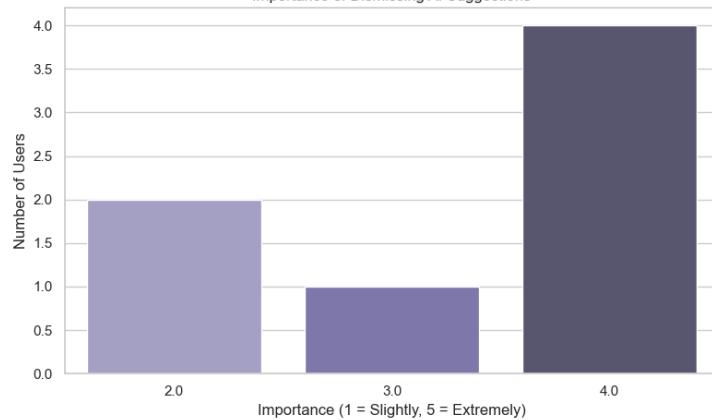


Do Users Trust AI to Highlight Spreadsheet Mistakes?

Yes because it would do a good job



Importance of Dismissing AI Suggestions



Interview Length: 30-40 mins

Workiva User Interview Questions

Note: Interview transcripts have been omitted for privacy reasons. Key insights, themes, and quotes are available via the affinity map PDF.

Intro (~5-10 minutes)

- Thank you for taking the time to meet with me today
- Rundown:
 - We are conducting a study to learn more about people's thoughts and behaviors towards spotting mistakes or unusual patterns when working in spreadsheets.
- Before we get started, I'd like to go over a few things
 - First of all, my goal over anything else in this process is to make you as comfortable as possible.
 - So this is formally called an interview, but I'm hoping that feels more like an open conversation.
 - Feel free to let me know when you want to slow down or take a break at any point.
 - There is absolutely no right or wrong answer, only your experience, so feel free to tell me as it is.
 - Your responses are confidential, and your identity will NOT be tied to your responses whatsoever.
 - Finally, is it ok with you if I record this interview? The video will be only for me, just so I can revisit our conversation for note taking purposes.
- Do you have any questions for me?

start recording

Interview Questions (~25 mins)

1. Can you describe how you currently use spreadsheets in your work?
2. What kinds of data do you typically track in your spreadsheets?
3. Please elaborate on a time you encountered errors or unexpected trends in your spreadsheet data:
 - a. How did you detect them?
4. How do you currently verify the accuracy of your data?
5. What are the biggest challenges you face when working with large spreadsheets?
6. How do data anomalies (unexpected spikes, drops, errors) impact your work or business decisions?
7. Have you used any tools or techniques to identify anomalies in your data?
 - a. What worked well, and what didn't?
8. If an AI tool could flag unusual patterns in your data, what information would you need to know to trust its recommendations?
9. If an AI tool could notify you of anomalies, how would you like to be notified? (e.g., inline highlights, pop-ups, email alerts, dashboards)

Closing (~3 minutes)

- That's it for questions on my end. Do you have any questions for me or final thoughts before we wrap up?
- Thank you for taking your time to participate!





LUKE HARPER

“I would like to verify information myself. I don’t want AI making decisions for me—I want it to point me in the right direction.”

AGE : 34

LOCATION : DENVER, CO

OCCUPATION : SALES REPRESENTATIVE

TECH COMFORT LEVEL : MODERATE

BIOGRAPHY

Luke travels regularly for work and has tight deadlines. He is detail-oriented, organized, and uses spreadsheets to track clients, revenue, and financial overviews. As a team player, Luke relies on his team to manually validate his work

PAIN POINTS

- Manually checking data leads to errors that can be easily overlooked
- Frustrated by sheets freezing or crashing
- Time limitations lead to errors when working under deadline pressure
- Struggles to keep formulas intact

BEHAVIORS

- Primarily uses Microsoft Excel and Google for work
- Likes to verify information himself and run it by teammates
- Prefers using past knowledge to guide intuition when reviewing anomalies

GOALS & NEEDS

- Stay organized and on-the-go
- Maintain credibility with his team & leadership
- Wants control over making the final decision

Customer journey map



	Initiate AI Scan	Awareness of errors detected by AI	View short summary of errors	View details / dismiss notification	Manually fix errors
Touchpoint	AI button	Error icons appear inline on spreadsheet	Popup with short anomaly description	Detailed popup	Spreadsheets view
Customer Actions	Clicks AI scanning button	Notes error notifications in cells	Hovers over error icons to learn more	Dismisses notification or reads detailed view	Has control to validate and make changes themselves
Customer Experience					
Customer Quotes	"I need to check my work. I might have missed something while manually checking."	"Turns out there were a few things I missed!"	"This makes sense. Let's investigate."	"This explains why the data was off! I'll go ahead and dismiss it now."	"Now I can confidently review the errors and make the necessary changes."
Website Solution	Add AI scanning button above spreadsheet view	Inline icons appear within cells	Add popup for quick anomaly summary over icon	Add detailed view and dismiss button	Provides suggestions, but allows users to make final call