

Problem Statement

Talking to customers is key to fully understand what they think, expect or feel towards our products. Our applications may fit their needs and customers may be satisfied, but they may be and engage even more.

Currently user feedback loop is small and is only affecting some upper management layers.

Objective & Goals

The main objective is increasing the user engagement by involving customers in the process of hearing and collaborating together towards a solution: an iterative process in which customers raise concerns and feedback, and we rapidly provide solutions that will be presented to them and refined to get the final sign off. This way of involving customers in the solution is willing to make them feel more heard and an essential part of the product development.

Business Challenges

Current company structure to gather and act towards user insights is a long path in which Design and prototypes are really late in the process. This plan aims to get a bigger loop, ask better questions and work towards customer satisfaction. When talking to end users we're asking about what their frustrations are, but it's crucial to know their context and narrative to get to their big picture. This way we'd be able to improve the User Experience, assuring they're using them in an effective and efficient way, what may lead to an increase of the Net Promoter Score.

Team

Primary team was composed of the CXO, an Account Manager and myself as the Product Designer.

Process

Starting this plan off is about going big and gathering as much data as we can. We think the best way for doing this is sending our customers a survey considering that it needs to be filled out by real end users. After collecting all this data it's time to look to results from an aggregated view and find patterns. These can be grouped in an Importance - Difficulty matrix and depict a plan for the short and long term.

First stage: Engagement

It's crucial to involve and encourage our users to be a key part of this plan as they'd be raising pain points, collaborating in analysing the issue and validating the solution. This four stage plan should be presented as a solid process with clear inputs and effective outputs.

Second stage: Survey

The goal of this Survey is to find pain points users are facing in a daily basis when using our products. Other goals can be achieved, like knowing what feature we should prioritize next. We will learn as well about their mental models as it will tell us about their motivations and reasons behind their actions.

Microsoft Forms offers a nice way to share surveys with people and a way of branching questions. It allows to track responses, bring results in a dashboard, and connect data to Excel to produce reports.

Results will raise some topics that may be tackled in further stages.

Third stage: Analysis and Prototypes

After estimating the Survey results some issues may show a straightforward way of fixing, i.e. It's confusing to find this feature within this menu since it's used in other step of the process. Others don't, i.e. this dashboard doesn't help me to focus on my urgent tasks in a glance. The latter kind of issues are not meant to be resolved quickly or easily, so the more data we can collect about possible solutions would help us in iterating around the perfect one.

It's time to gather more information about the issue we want to solve so interviews and workshops may be run with end users. After the first round we can produce a couple of alternative Figma prototypes that will be used in the next stage.

Fourth stage: Usability testing

We can measure existing or potential features using Usability tests based on our prototypes. Then analysing the data to decide a solution or keep iterating building new prototypes.

Our prototypes are used as an input for external tools, such as Maze or UseBerry, in to place a test layer on top and collect analytics about their usage. In this kind of tools we can create a single or multi task flow where the prototype screens are navigated while gathering data from their experience. Based on this data we can learn about how users are performing some tasks and their thoughts about them.

Proof of Concept

Before spreading the word across all the Organisation and teams we may find a first round for it which may consist in narrowing down the context and use the plan for a certain project within a product.