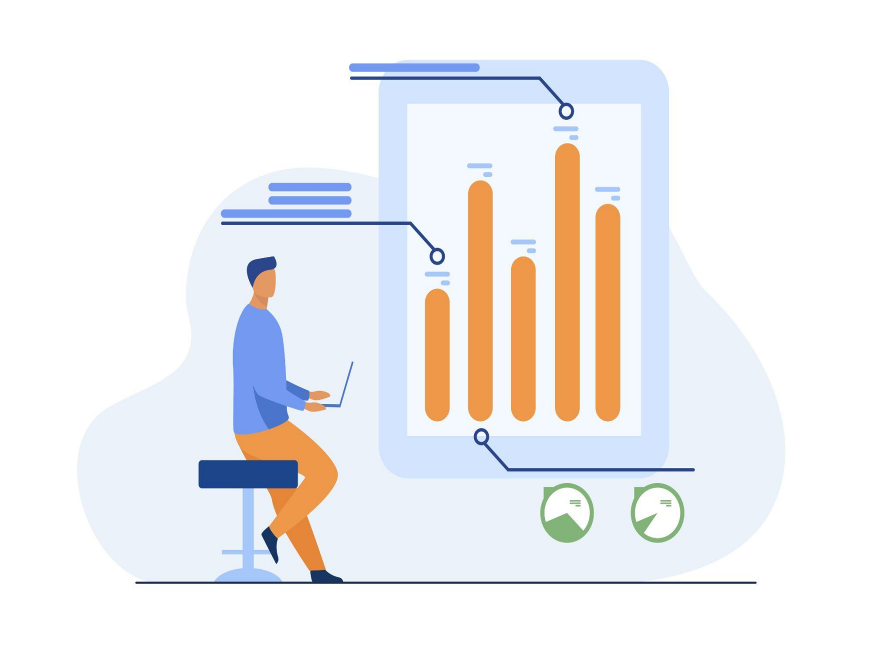
Disposition Metrics 2.0

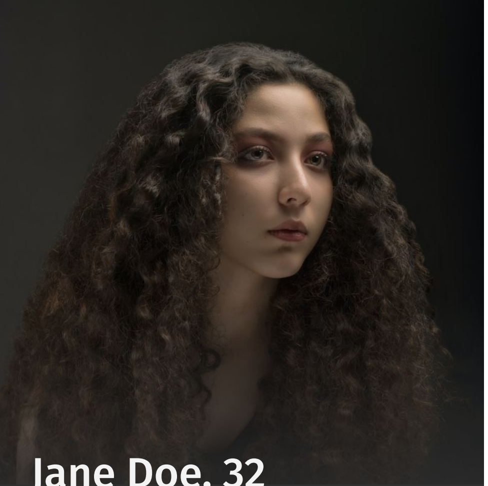


Outline

Currently our CX users are facing issues using the Disposition Metrics screen. There are multiple reasons for this:

1. The platform currently isn't capable of displaying data based on custom filters.
2. In-ability to download the data for statuses like Unsubscribed or Bounced etc.
3. Latency is observed while loading in case the number of responses are quite high.
4. The count mismatch issue is often observed.
5. Limited information regarding the mode of delivery is displayed..

Hence, we need to revamp the whole screen so that we can add all the major functionalities that can solve the pain points and needs of our customers..



Jane Doe, 32

CX Implementation Specialist , US

Tech literacy: High

Personality:
- Extrovert
- Proactive
- Busy

"I'm often handling multiple projects at once - time is tight..."

Bio

She hails from US and has done masters in Computer Sciences. She has worked in previous organizations as Sales Lead, Customer Success Champion. She is analytical and keen observer and has hunger to know how things work.

Goals

- Monthly/Quarterly report to the Management Team
- Numbers should be correct
- Responsible for strategic development

Needs

- Better UI of the Disposition Metrics Screen
- Need to have a place where I can view the logs of why the transactions got failed/bounced/un-sent
- There should not be any kind of restrictions on the filters.
- Very minimal latency should be there when loading the page.

Frustrations

- When the date filter applied is yearly/quarterly, it takes ages to load.
- The numbers displayed on the screen does not match at times.
- Can't download the list of people who have unsubscribed.

User story

[Jane Doe], [CX Implementation Specialist], [35 Years]

As a CX Implementation Specialist, when I’m asked by Management team of the organisation to display the Quarterly/Early report based on a few filters, I want to get the stats displayed on the screen so that they can view the reports and share the common understanding and the next steps.

[Phase-1]

Problems

[Latency]:

The major pain is the latency observed in the product in the cases when the number of responses are quite high. .

[Stucking of the Screen]:

This is again related to the latency as at times when the date filter applied on the Disposition Metrics is quarterly or Yearly, the screen gets stuck in between and we've to reach out to QuestionPro employee's for the help.

[Count Mismatch]:

The counts seems ambiguous to the users at times on the screen as it doesn't indicate how the number that is being displayed is calculated.

Problems

[No Visibility on Response Analysis]:

When the survey is out, we do have different states ex: Viewed, Completed, Started, Started but not completed etc etc. All these statuses aren’t displayed as a wholesome card.

Current system limitations

[Restriction on Filters]:

Currently, users can only view the Survey and Segment as filters. As the product supports system variables that should also be supported.

[Little Information on Modes of Transactions Sent]:

In CX, we've different ways to send out the transactions, however, the visibility is only limited to Email/SMS.. Need to display all the modes that is used.

Scope

The scope of the project is limited to the Disposition Metrics screen where a user will be able to view the details of the transactions in the drilled-down manner.

The screen now will be capable of handling various filters like Survey. Segment, Custom Variables.

The download report will support all the different formats like CSV, Excel, PDF etc

We may add logs to the screen which will provide a reason as to why the transactions got failed or whatsoever may be the case.

Solution

[Screen Revamping]

We need to revamp the whole screen so that we can provide the holistic view of the transactions i.e if at all they were sent, if not, what is the status, if sent then whether people have responded or have they just viewed.

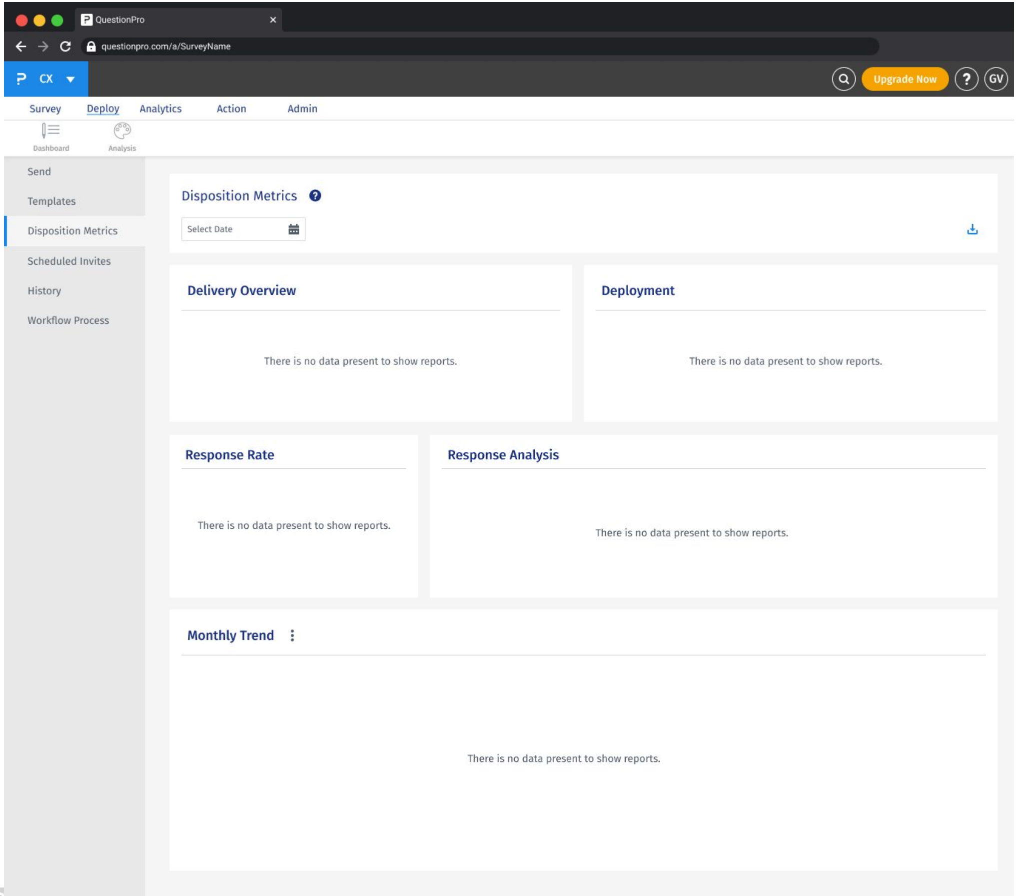
All these minute details helps the user to think clearer and form the strategy accordingly as the next steps. .

Acceptance criteria [Phase 1]

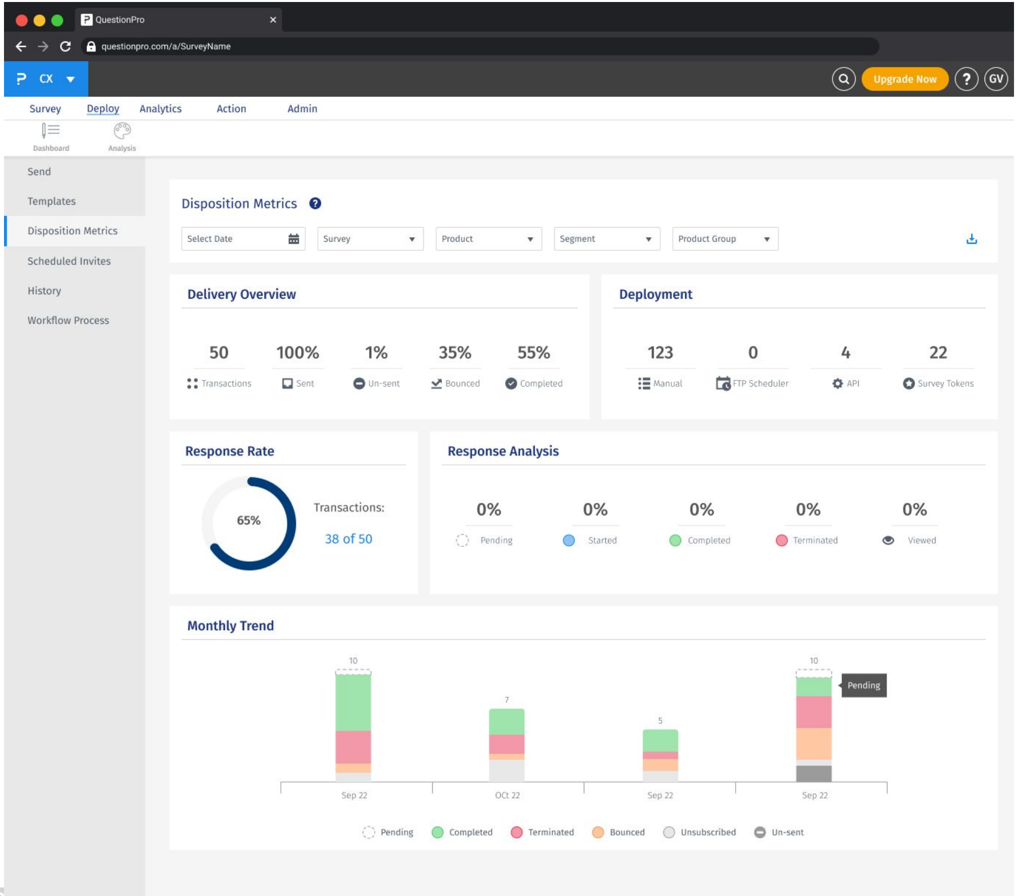
1. Test that all the changes are present on cxlabs instance.
2. Test that for filters, we are only having the filter icon, on click of which, an accordion opens and then user can select the filters according to the choice.
3. Test that in phase 1, the download report is of excel format only.
4. Test that the date picker is according to the modern UI design.
5. Test that the screen has 5 cards.
6. Test that the cards are: Delivery Overview, Deployment, Response Rate, Response Analysis, Monthly Trend.
7. Test that the icons on each card is same as provided by the UI/UX team.

[No Data] - When there are no filters applied and then no data is also present

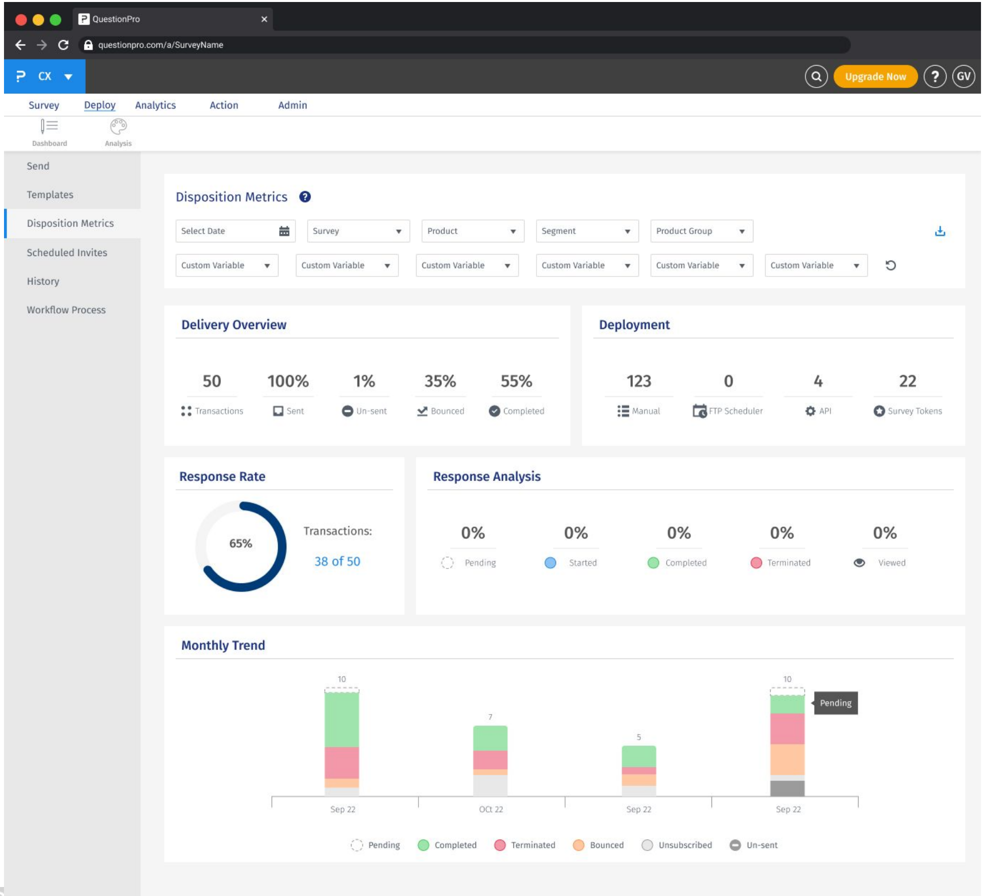
[Screen title] - Image area



[Ideal State] - When filters are applied and there is data present



[Ideal State] - When we have custom variables applied along with other filters



[Phase-2]

Phase 2

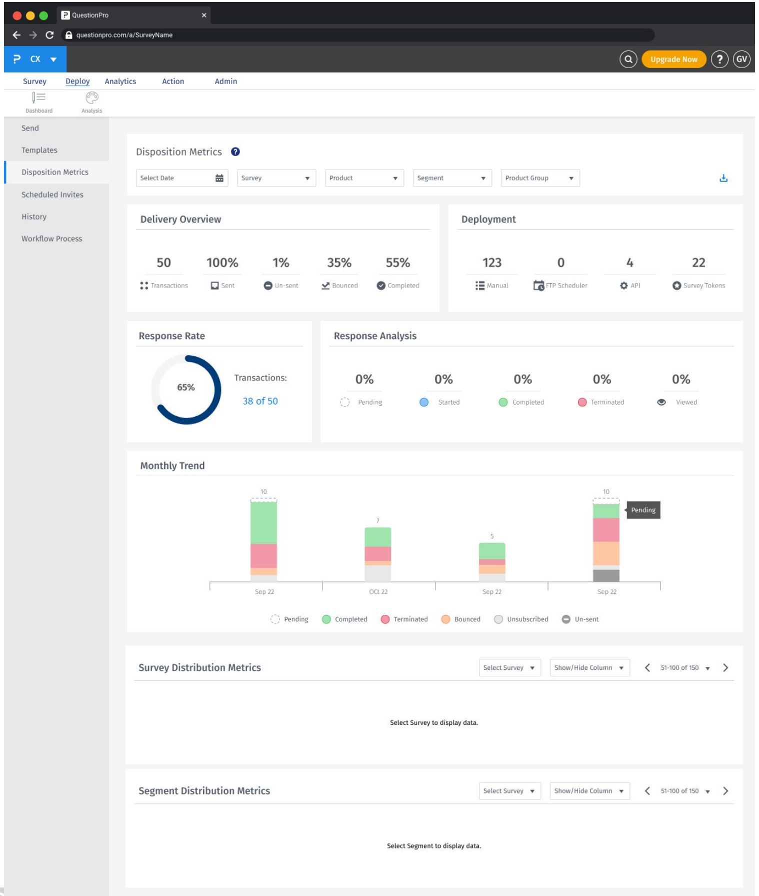
[Survey/Segment Level Details]

In Phase 2, we are targeting the bottom part of the screen where the counts related to Survey/Segment could be seen.

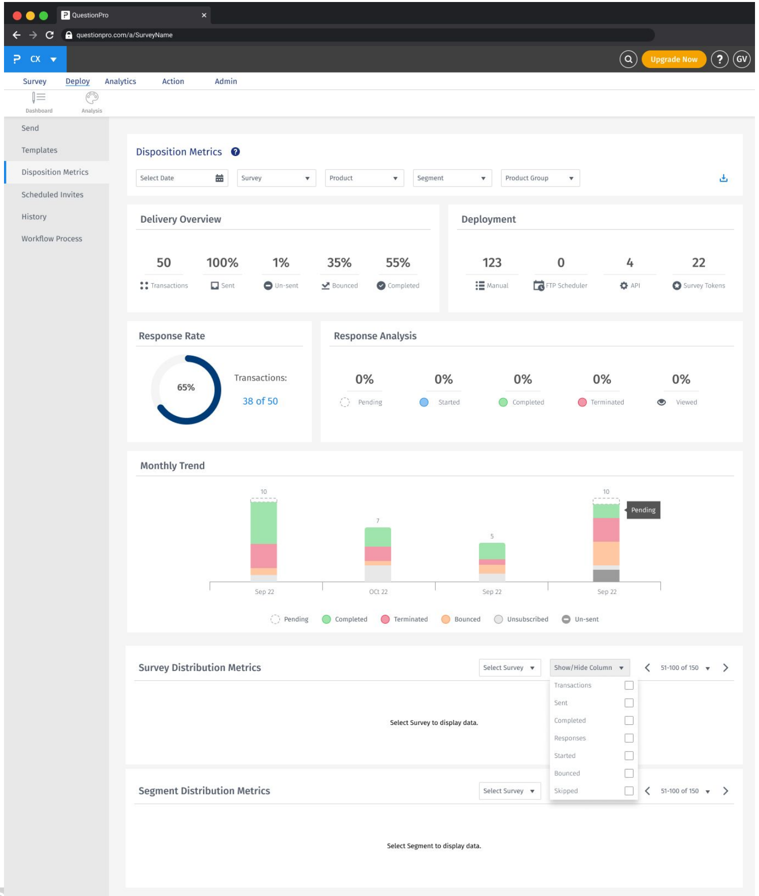
The user would need to select the Survey/Segment from the dropdown so that data for only selected surveys/segments is loaded on the screen.

We are also adding the additional information such as Email/SMS count wrt to the mode of send of the transactions.

[Ideal State] - When we have custom variables applied along with other filters



[Ideal State] - When we have custom variables applied along with other filters



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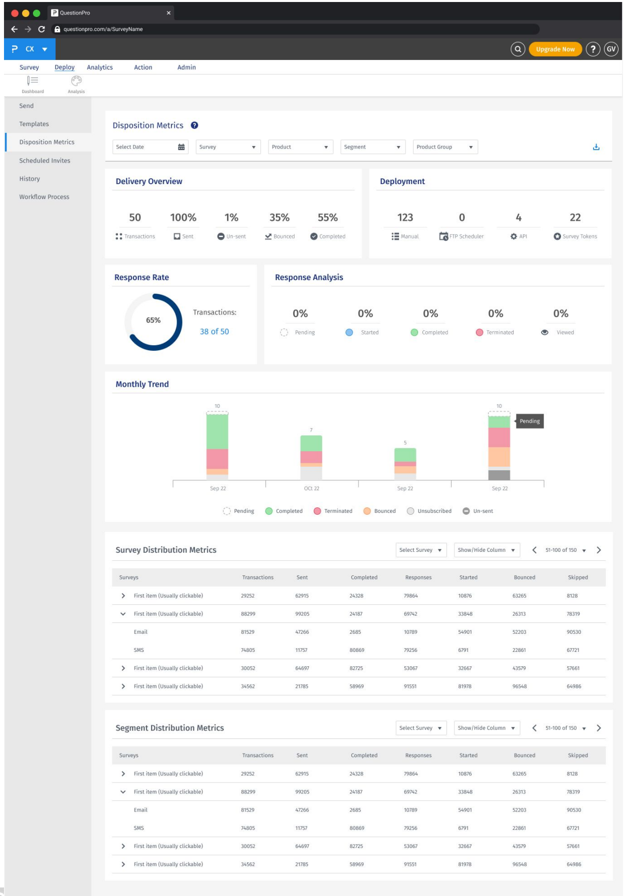

[Phase-3]

Items in Phase 3

[Providing reasons for Failed Transactions]:

During importing of the transactions, there are chances of the transactions not being sent out to the users. Hence, we'd like to provide the mechanism where the users can view why the transaction got failed with a reason attached to that.

[Phase-4]

Item in Phase 4

[Adding Custom Variable Filter]:

We would like to add Custom Variable filter in the Global section filter to make it common for both the Dashboard and Disposition Metrics screen. Also, the users want to get the transactions and check data based on specific custom variables. Hence, need to have this filter.

Prototype

Notes/Observations

- The filters applied on the dashboard and on the disposition metrics will be same as the origin will be Mapping screen. If Analytics option is toggled on, at both the places, the filter will be applied.

Thank you!

#ft-dispositionmetrics