Continuous Discovery
Mobile User Outreach

Continuous Discovery

Who Was This For?

Sauce Lab's Mobile Value Stream wanted to kick-off Continuous Discovery by recruiting Sauce Labs users to begin doing weekly user interviews.

Design Goals

1. Coordinate platform outreach to customers that would allow product team direct access to users.
2. Provide guidance on interviewing techniques and note taking during user interviews.
3. Iterate on process when unforeseen issues arise.

Business Goal

Iterate on a process with product manager to streamline outreach and achieve a cadence of 1 interview per week (outcome for Q1 of MOBA team)

The Process

The Process

Initial Discussions

Who are we wanting to recruit?

The Mobile Value stream team was initially hoping to reach out to any users who were utlizing the automated test results on real devices. This could include QA engineers, Developers and anyone else who was looking to run these tests within Sauce Labs.

The hope of these interviews was to learn more about how our users were using Sauce within their workflow and within their teams. The team was wanting to know how Sauce Labs fit into the testing needs of these different users so that opportunities could be identified from different pain points that may arise through the interview.

What will be our process?

Initially we discussed the possibility of using the user research panel as part of this initial discovery. However, the panel does not contain very many mobile app developers (of whom we were hoping to talk to as part of this discovery). Additionally, the manual labor of needing to coordinate outreach and scheduling of interviews was not something we saw as being very sustainable.

After some initial brainstorming to address these issues, we decided on the following process:

- For outreach, we would use Intercom as the in-product method.
- For scheduling, we would use Calendly to allow users to immediately book time.
- For note taking, we would use Miro to capture details about the interview.

The Process

Intercom

Message Type

After investigation into the different messaging types of Intercom, the team initially decided to use the post message type. This would allow us to target the message on a specific page (the Automated Real Device test results). It also provided a non-intrusive way of messaging the user without disrupting their workflow.

The Message

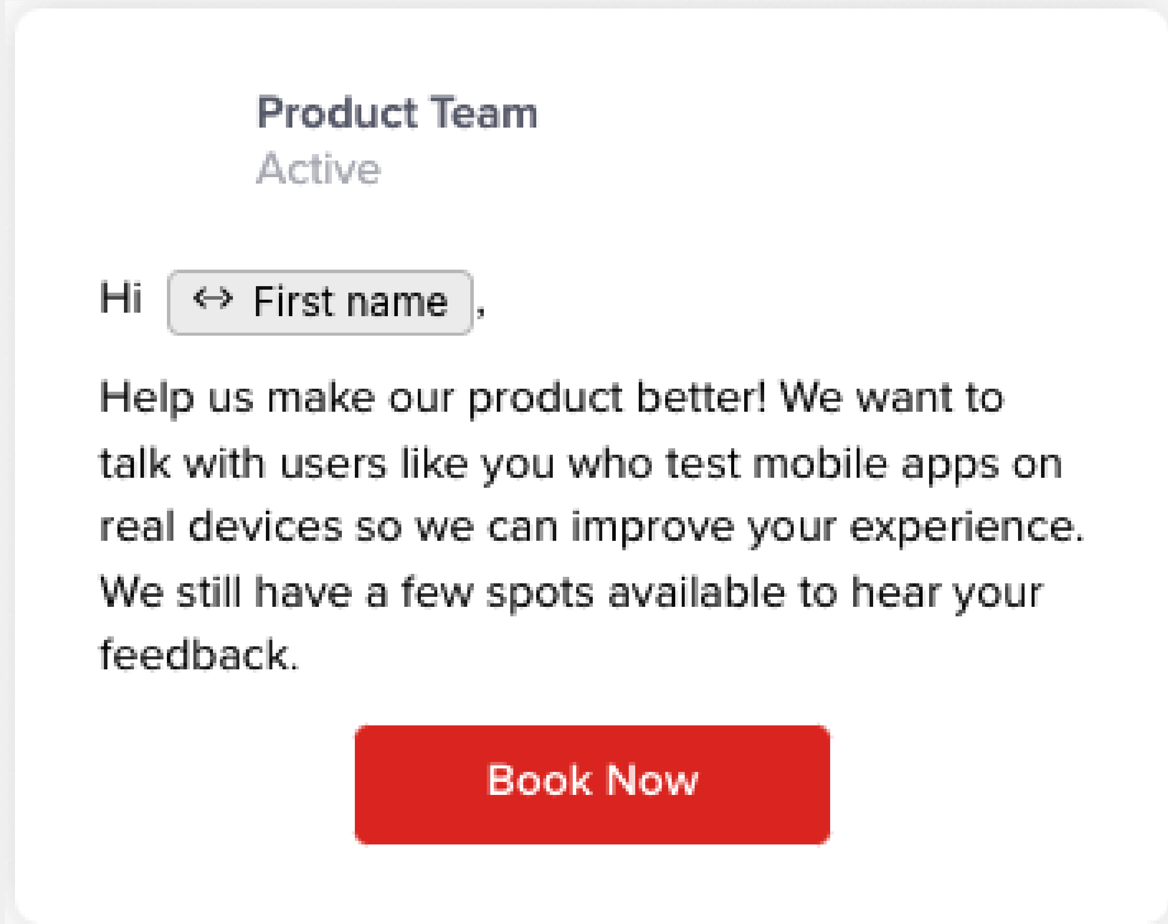
With assistance from the tech content team, we used the following message:

"Help us make our product better! We want to talk with users like you who test mobile apps on real devices so we can improve your experience. We still have a few spots available to hear your feedback."

Due to limited availability, this message was meant to elicit a FOMO reaction from users while also explaining the reason for limited time slots.

Call to Action

The post message on the test results page contains a "Book Now" call-to-action. This CTA navigates the user to the Calendly where the user could book time directly with the product team.

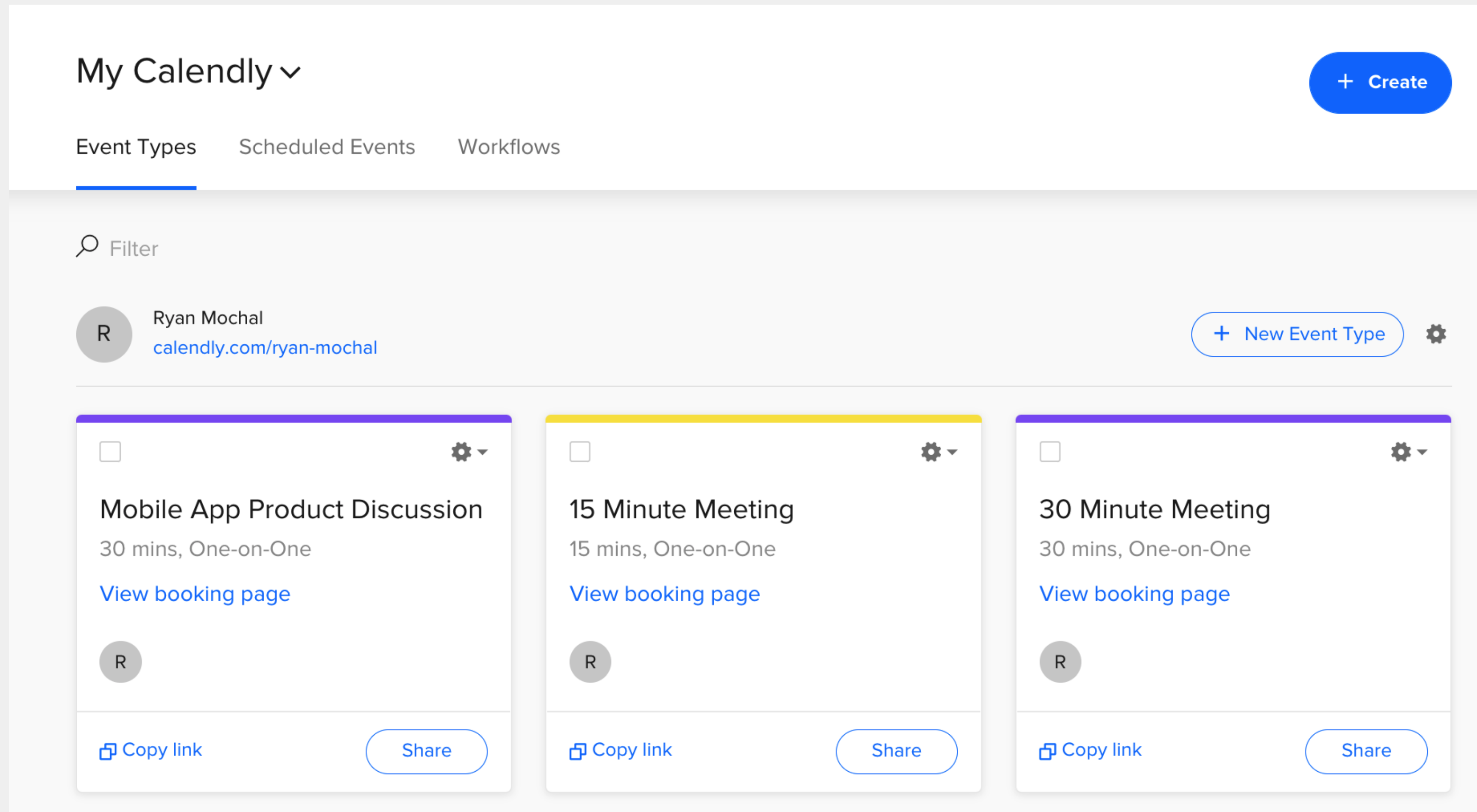


The Process

Calendly

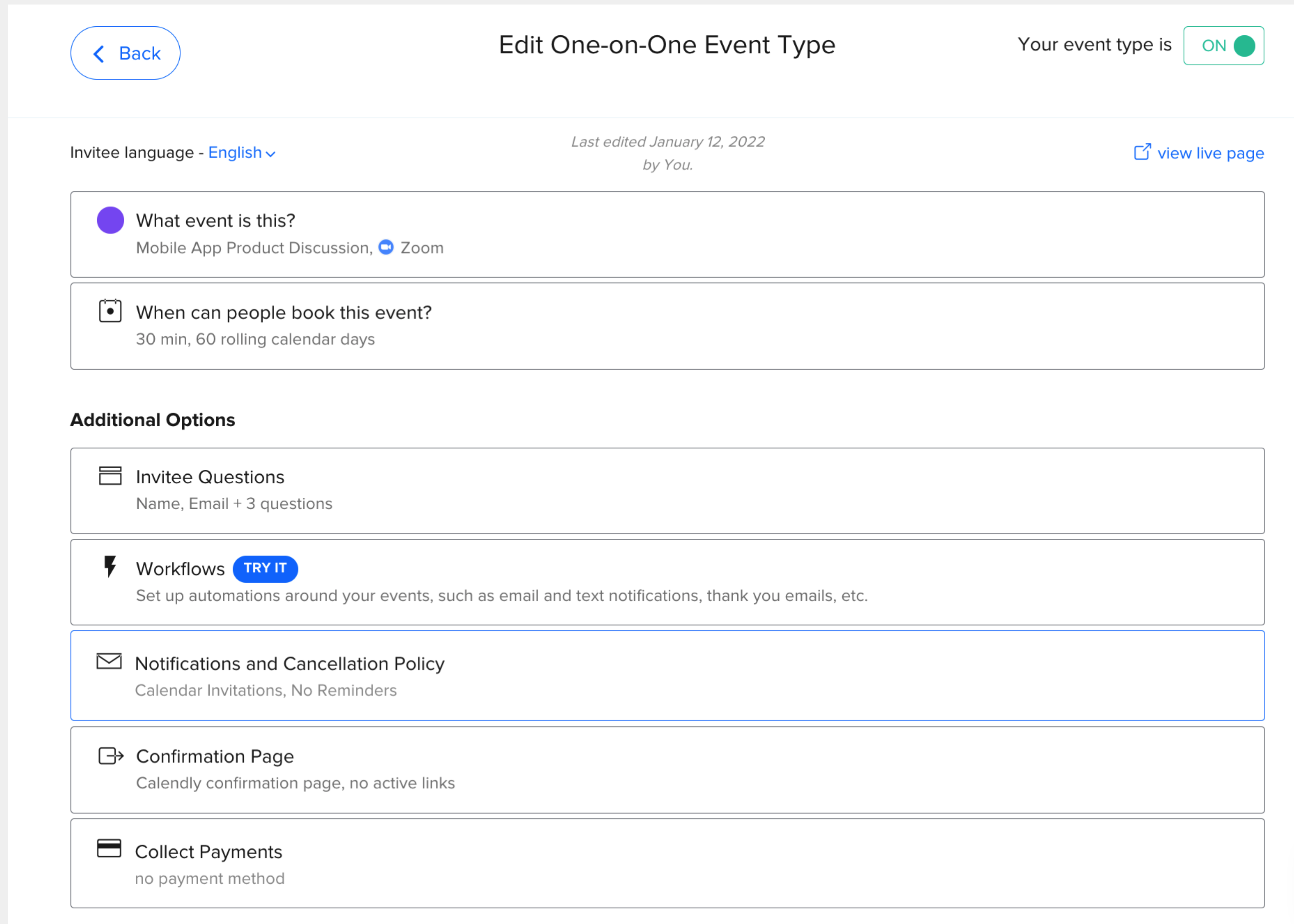
Initial Setup

In order to allow for users to sign up for direct meetings with the Mobile team, Calendly was decided as the preferred tool. Calendly offered the proper control on availability as well as some initial inquiry into the user's usage of Sauce Labs. This would allow the team to set-up some regular meeting slots while also collecting initial information prior to the meeting.



Availability

One of the major hurdles to our scheduling approach was ensuring regular time slot availabiltiy. Calendly has the ability to sync to the scheduler's calendar. Once a meeting is scheduled, it will also book the time and block it out on the synced users calendar. In order to provide better availability and prevent automatic booking of time, we decided to create a new Sauce email address. This way time could be booked under that account and anyone interested in specific interviews could be added to the meeting.



Coordination

Coordinating interviews was another hurdle the team needed to handle. Since we would be using another account to schedule interviews, it would mean we would not be automatically added to the interview when it was scheduled. In order to ensure we had enough representation, we created a Slack channel (#mobile-cdh) that interested parties could join. This channel was used to ensure sign-up from team members for scheduled interviews.

The Process

Miro

Note Taking Repository

In order to properly collect all of the data relating to these interviews, the team needed a place where they could take notes in a simplified manner. This place would also need to allow for collaboration in the future so the product triads (Design/PM/Eng Lead) could identify potential opportunities for further discovery or development. After some consideration, it was decided that Miro offered the freedom of note-taking and the scalability needed for potential collaboration.

Interview Cards

Transcribing an entire interview can be rather cumbersome and unnecessary. In order to capture important points throughout the interview, we created “Interview Cards” (as outlined in Continuous Discovery Habits). These interview cards are ways for note-takers to capture important items throughout the interview without feeling like they need to capture everything. Interview cards are broken down into 3 different segments:

- **Quick Facts** - These were items that could lend background or provide context for a user’s workflow or perhaps the pain points that will be identified throughout the interview. Things like job title, team size, job responsibilities, etc. were all be documented here.
- **Insights** - These were key areas of interest for the team. They are events, situations, or scenarios during the interview where the user has an identified “pain point”. Jotting these items down gave the team the ability to see commonality of issues and decide whether opportunities should possibly be explored.
- **Opportunities** - During the interview, it is hard to to think of ways of solving customer issues. The opportunities area was a way to capture any solutions the interviewers may have had during the interview without getting too “in the weeds”.

The Process

Internal Communication

Google Email Address

The lead product manager inquired to the IT team about the creation of a new alias within Sauce Labs. The creation of Mobile-CDH email allowed us to have a generic email that we could use to have users book appointments on. Team members could then subscribe to this new email's calendar and get notified when users actually booked time through Calendly. Having the email address also allows us the ability to message users using a generic Sauce Labs account.

Slack Channel

To regularly discuss interviews relating to Mobile as well as receive volunteers for upcoming interviews, we decided to create a focused Slack channel (#mobile-cdh). This Slack channel was open to anyone to join. It was mostly being used to synchronize roles in upcoming interviews.

Bi-Weekly Value Stream Meeting

The team also set up a bi-weekly value stream meeting. This meeting was initially meant to discuss the findings of the continuous discovery interviews as well as possible iterations we can do regarding the outreach. As insights and potential opportunities became apparent, these meetings evolved into discussion of potential outcomes and designs to better the mobile value stream experience.

The Process

The Interview

Product Attendance + Roles

To ensure that the team has a good representation of the product triad within each interview, we decided that (at minimum) each interview should have 2 Sauce Labs team members. These members will have 2 distinct roles, each decided prior to the interview.

- **Facilitator** - This was the interviewer who would lead the discovery session. There is only 1 facilitator per session. Their job was to start the discovery session and guide the user to provide more details when certain scenarios demand further exploration. The facilitator would also be responsible for ensuring the interview was recorded and any questions the rest of the group may have during the interview (posted into the chat channel) were asked. For the sake of time, they were the only ones permitted to inquire to the user until the last part of the interview when questions are open to the group.
- **Note Taker** - These are the interviewers who would capture any relevant information that comes from the interview. There needs to be at least 1 note taker per interview but more were welcome to join. Ideally, the note taker would be inside of MIRO where they would utilize the interview snapshot to capture as much relevant information as they can through the use of sticky notes. If further inquiry is needed, they typed their question into the chat for the facilitator to then inquire to the user or they needed to wait until the final minutes of the interview.

Manually Controlled Outreach

Working Agenda

The Mobile Value Stream was looking to learn more about how our users were utilizing automated real device testing in their current workflows. Because of the generic subject matter, the interviews were focused on the user's current set-up, team structure, communication, and reporting of errors. Below is a rough timeline of how each interview was structured:

- **First few min** - Introductions and inquiry about recording session for internal note taking purposes.
- **Next 15 min** - Deep dive into user's workflow. Inquiry about how they are using Sauce Labs, what type of testing they are currently performing, how that is solving their testing needs, and how they communicate test results to the rest of their team. This is not expansive but typically the guide of questions that got asked.
- **Next 5 min** - Inquired to the customer if there is anything they would like to see in Sauce Labs? Was there any feature or functionality that would make their testing needs easier or provide them more value? This is an opportunity for them to tell us anything that is currently wrong with the platform or if there is a feature that would elevate their testing.
- **Last 5 min** - Open questions with the rest of the team. This gave other team members an opportunity to ask direct questions to the user. The hope was most questions will have been asked from the chat by this time.

Encountered Issues

Encountered Issues

During the first few weeks of the outreach, we quickly encountered several issues regarding the process we had initially launched. Some of these issues were:

1. Allowing users to schedule too far in advance.
2. Users see no availability when going to Calendly.
3. User no shows for scheduled appointment.
4. User joins interview for help / support.

These issues are discussed in more detail on the following pages, as well as the improvements that the team agreed on to address them.

Encountered Issues

Advanced Scheduling

The Issue

When initially setting our Calendly event, we allowed users to book time up to 60 days in advance. This caused several users to book time with us 2-3 weeks out from when they initially scheduled. Since these were voluntary meetings and we were experiencing some no shows, we felt booking this far in advance could cause more people to either cancel last minute or no show altogether.

Solution

After some initial discussion, it was decided that we tighten the sign-up window on the Calendly to be 10 days. This way users could still book just over a week in advance but would not see any availability beyond that.

No Team Availability

The Issue

During the first few weeks of the outreach, all of our times slots were booked. Since Intercom was not directly tied to Calendly, this meant that users could go to sign up only to see no availability.

Solution

To combat this, we monitored the amount of scheduled interviews for the week. Once all of the time slots had been booked, someone on the team would go into Intercom and pause the post until after all of the scheduled interviews for the current week have been completed. This way users would not be taken to a calendar that shows no availability.

Encountered Issues

No Show Appointments

The Situation

The initial hope of the outreach was that by simply allowing users time with the product team directly, this would enough of an incentive for them to sign up for an interview and join. However, we started to encounter a string of no shows during certain weeks and needed a way to "incentivize" users to show up to their appointment.

Solution

During the process, we never felt the need to start incentivizing users for their time as we consistently had users signing up and showing up for their interviews. If no-shows occurred more regularly, we had the option to offer a monetary incentive (although this would require further approval).

Help / Support Users

The Issue

Near the end of our initiative, we started to encounter users who would join the call in order to get assistance with their set-up or configuration of their Sauce Labs instance. This caused some cancellations since the users were not currently using Sauce and needed to be given over to Customer Support to assist their needs.

Solution

Approximately 24 hours prior to a scheduled appointment, a team member would message the scheduled user to ensure that they would be coming to the meeting, ensure they understood the purpose, and also see if there was anything they wanted to discuss. This allowed us to: 1) increase the likelihood of the user showing up, 2) set the tone for the discussion the following day, and 3) provide additional time to chat about any issues the user may have and how we may be able to assist (even if it was contacting a customer support team member).

The Results

The Results

Week of January 24th

Software QA

QA Engineer

No Show

Week of January 31st

No Show

Lead QA

No Show

Week of February 7th

No Interviews Scheduled

Week of February 14th

Mobile App Devs

No Show

Week of February 21st

No Show

Front End QA

Interesting Statistics

100% sign up of available time slots over first 2 weeks

50% overall show rate

3% users selected the Book Now button when prompted

Conclusion

What Happened?

Due to the reprioritization of product initiatives on the Mobile Value stream as well as a shift in product leadership, the user outreach was halted in early March of 2022.

What Was Learned?

1. Recruiting specific types of users is difficult while using a broad intercept. A more targeted tool like User Interviews may have been needed to supplement this gap in user roles.
2. Allowing users to directly sign-up was a success. This process yielded more sign-ups and appearances than any previous user outreach.
3. Incentives need to be given. Our user's time is so precious that simply asking them to show only to speak with the product team was a hard sale.

Final Thoughts

This process taught me a lot on how to recruit users for studies as well as engage my product and engineering teams into the interview process. I look forward to carrying on my teachings to any upcoming user studies I may conduct.

Thank You