

# Web / Audio Conferencing Solution



Overview / Personas / Journey Maps

Hello, I'm AJ...

# Introduction

## Personas & Journey Maps

We created provisional personas to better understand the user's, then the use cases / features that may apply. Personas are primarily developed to help determine where there are opportunities and areas for improvement / innovation in a digital user experience. This can guide the feature set and validate your UI design and business decisions. There is value in sharing these personas with any and all teams in the organization and can even be used to guide your personalization strategy.

A well-executed persona description helps our teams work "on the same page," when it comes to understanding who their users are. It can eliminate the confusion and wasted efforts that come when team members with different ideas of who their users are. As you review these personas, know that they are not just not just for communicating ideas, but for discovering ideas, new opportunities, and common activities among all users.



## Persona - A



## Michelle

Persona Type
Executive

"

Michelle needs tools that are simple to use and convenient...

## Summary

Michelle has a ton of demand on her time, getting into her daily agenda can be difficult. Michelle is constantly pulled into key conversations and meetings through the day. She needs both people and tools to help her better manage her daily workload. Often times, an administrative assistant books and accepts meetings on the her behalf. Being able to view, manage and attend meetings within the office or on the go, is a routine requirement. Prior to attending some meetings, she looks to see who is participating, if key people are joining, she will be there. Else, she may decline to focus on more important tasks in her day. Michelle uses several different meetings tools internally, with clients, and vendors. Having a single tool to help manage and participate both conveniently and easily would be a huge benefit.

#### **Key Use Cases**

This user often moves - on the go, user needs to maximize their time throughout the day. Being able to easily host or participate in a meeting contextually (i.e. airport, coffee ship, or in a vehicle) is a must have.

This user need a single point of entry to manage / monitor several professional contacts and calendars containing meetings / conferences.

This remote user can move from meeting to meeting, needs to be able to decline or notify others when running late or unable to attend.

#### Roles

#### As a Host

While experienced, typically relies on others to set up meetings and manage activities. Looks for the quickest solution.



#### As a Participant

Pulled in many directions, is often invited to non-critical meetings.

Attends meetings when available, but may not be fully engaged while multi-tasking.



Meetings this user attends must be important

### **User Challenges**

No time to learn new business tools – needs to be ready "out of the box"

Usually on the go, rarely stationary to enjoy the added convenience of a desktop



# Journey Map - A1



Michelle
Executive — Host
Context — At Airport

Needs to schedule a managers meeting while on a business trip.

"What is the easiest way to remotely set up a conference call?"

Asks assistant to set up a meeting for next week, and provides the subject, assets and attendee list.

"Is there an easier way to select a group of attendees?"

Receives meeting invite on mobile device mail, and accepts to calendar.

"Is there a way to sync and manage my meeting from one spot?"

Emails back and forth with assistant to track attendee list, receiving and accepting updates to the original meeting invitation.

"My assistant would only accept times that I'm available... Why do I have to keep accepting invitations?"

Receives mobile alert – meeting begins in fifteen minutes.

"Did everyone else get my presentation?"

"Do I have everything and everyone I need for this meeting?"

Opens meeting invitation from device, finds the call-in number and signs in to meeting early: Dials number, enters access code, speaks introduction, waits for feedback.

"Are all these steps really always necessary to join a call?"

Joins meeting as participant.

"Who's on the call?"

"I made a last-minute update to the presentation. Did everyone get it?

Participates in meeting, taking rough notes, to-dos and other action items.

"Is there an easier way to manage action-items and to-dos while in conference?"

"Is anyone else taking notes?"

Mutes call while participating in a private sidebar discussion via group text.

"Navigating to find contacts is difficult and cumbersome. This conversation will have to wait."

Boarding flight, leaves meeting.

"I need an easy way to hand off meeting controls."

"I don't always complete my agenda while on the go."

"I'm worried I will miss something important by leaving early."

Types up email with meeting notes, sends to attendees. Waits for others'.

"Is there an easy way manage and share to-dos and action items around the meeting?"

# Journey Map – A2



# Michelle Executive — Participant Context — In Vehicle

Receives notification of new meeting on mobile device. Reviews agenda and attendee list.

"Do I need to attend?"

Checks device calendar before accepting.

"Is this meeting part of a series?"

"Do I have everything I need? Do I know everything I need to know?"

Receives and accepts updated invitations as attendees and timing change.

"Constant updates are annoying. I don't want to spend more time reviewing and accepting invitations."

Receives mobile alert – meeting begins in fifteen minutes.

"Do I have everything I need for this meeting?"

"I want to attend, but may be late logging in, and disconnecting early."

Opens meeting invitation from device, finds the call-in number and signs in to meeting late: Dials number, enters access code, speaks introduction, waits for feedback.

"Are all these steps really always necessary to join a call?"

"Where is the conference info?"

"Will logging in late be a distraction to others?"

Joins meeting.

"Who's on the call?"

"What have I missed?"

"Sometimes I can't tell who is speaking."

Mutes call while multi-tasking.

Disconnects from meeting to transition to another location.

"I can re-join soon, and don't want to have to re-log in. But simply muting the phone doesn't seem like a practical option."

Re-joins meeting from office. Logs into web conference on desktop, re-logs into audio conference.

"Is there an easier way to join a meeting with multiple devices – logging in twice is redundant."

Waits for meeting notes from other attendees.

Receives emailed notes from other attendees and determines next steps.

## Persona - B



## Scott

Persona Type

Facilitator

Single point of access for meeting management could have a big impact on my work day.

## **Summary**

Scott represents several work streams, he uses his project management skills to coordinate work across internal organizations and vendors alike. Aiding stakeholders and management leadership, he juggles everyone's priorities and requests. Meeting management and communication are keys to keeping people on track and aligned on business goals. Aligning schedules, creating agendas, tracking down shared documentation, setting common meeting locations, and sending out the invite a routine tasks for setting up a meeting conference. Once the invite goes out, he may or may not hear from key participants until the meeting starts. Scott is used to the tools he has on the desktop, but maybe there is a better way to help him manage these meetings? He is a power user, so replicating everything on the desktop could be a challenge. However the convenience of managing predefined meetings guickly and easily from one product, can be a huge time saver.

#### **Key Use Cases**

This user is a power user, needs the ability to manage / update meetings.

This user needs tools to moderate and run the meeting, this user needs the proper tools to manage the audience attendance, participation, and outcomes of the meeting.

This user needs a means of knowing who did and didn't attend the meetings to provide status updates, participate (questions, comments, feedback), and / or silently observe.

#### Roles

#### As a Host

This user is a 'power user.' With a lot of experience, has conferencing workflow nailed down.



#### As a Participant

As an experienced user, is a savvy participant. Can struggle to balance priorities and stay engaged in each and every meeting.



#### **User Challenges**

Always open to new and better solutions that might make things easer, but easily turned off by a complex learning curve.

# Journey Map - B1



Scott
Facilitator — Host
Context — In office

Needs to schedule a recurring status meeting for the project team.

"Which tool should I use? Do I need audio? Web?"

Uses email platform to set up a meeting invitation. Adds attendees, sets a time and agenda.

"Can I simply add a group of attendees rather than one by one?"

Uses preferred conferencing line and adds number to invite.

Emails out meeting invitation.

Uses email to track invitation replies and attendee acceptance.

"Did enough critical people accept for this meeting to be productive, or do I need to reschedule?"

Uses mobile device to update on-the-go. Revises agenda and adds additional assets.

"Can I add assets and update details while on the go?"

Receives calendar alert – meeting begins in fifteen minutes. Moves into local meeting room.

"Do I need to send a reminder email with login details?"

"Do some attendees need to sign in late? Who will be on the call, and at what time?"

Joins meeting early: Dials number, enters access code, speaks introduction, waits for feedback.

"I'd like a more convenient way to monitor attendee presence."

Monitors email and texts while waiting for others to join.

"The first few minutes of my meetings aren't typically very productive."

"Are all the necessary people in attendance?"

Assigns different presenters, and mutes attendees as needed.

"I'm not critical to the meeting agenda, but I still have to be actively engaged to help change presenters and direct the meeting."

Leaves call early.

"I need to easily be able to hand over privileges."

Types up own meeting notes on device and emails to team.

"Is there an easier way recap the meeting?"

"Using my device to type notes is cumbersome, but the team needs a recap sooner than later."

Receives emails with others' meeting notes.

"Did I hear from everyone with to-dos?"

"Was the meeting a success? Do we need a follow-up meeting?"

"I have to manage several emails, concerning several meetings each day."

"These meeting notes often help me outline our next meeting."

Consolidates team's meeting feedback and sends team email.

"There should be an easier way to make all meeting notes accessible to all attendees."

Schedules next meeting and updates original meeting invitation with new agenda and assets.

Pre-Call During Call Post-Call

# Persona - C



# Davis

Persona Type Silent Observer

Davis doesn't use any meeting tool regularly, this needs to be simple and easy.

#### Summary

Davis is a senior level team member. He has recently been added to a new project in the organization. With this new effort, comes several meeting invites from project managers and other team leads. He attends meetings to get up to speed on what's already happened in the project and where he can contribute. Knowing he is the new guy, Davis isn't quick to speak up unless called upon by the host to provide status updates. He gets to know other team members based on voice and face recognition where possible. Creating relationships / trust with these contacts is key to David being able to be successful on this project. As he becomes more familiar with other teams and team members, he contributes on a much higher / frequent level.

## **Key Use Cases**

This user never actually participates in the meeting and is more likely to communicate in private following the meeting.

This user needs easy access to see who's on the call and the roles they play in the project.

This user doesn't need many "in call" features. Being able to create to-do's and action items related to the meeting are needed.

This user is part of an inactive / larger audience that may attend the company's quarterly release.

#### Roles

#### As a Host

Little-to-no experience setting up and leading meetings.



#### As a Participant

Easy access to meetings is most important. Doesn't take action during most meetings, but stays on top of follow-up.

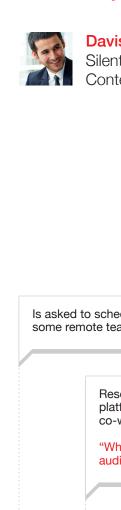


#### **User Challenges**

Not really and expert using any meeting tool.

Contributions are usually minimal in meetings, but can contribute content to the agenda via email.

# Journey Map - C1



**Davis** Silent Observer - Host Context — In Office

Uses multiple calendar assistants to add attendees and browse schedules. Sends invitation. "It's hard to find a time that works for everyone using multiple platforms." Is asked to schedule a meeting with some remote team members. Updates invitation. "I'd like some feedback that the meeting has updated successfully." Researches different conferencing platforms. Selects based on co-worker's recommendation. Receives calendar alert - meeting "Which tool should I use? Do I need begins in fifteen minutes. audio? Web?" Joins meeting as host: Dials number, Creates account. enters access code, speaks introduction, waits for feedback. "Do we have a conference line I can Waits for meeting leader to join. use? I don't want to create a new." "I need an easy way to see who's on

Hands off meeting controls. Mutes call while searching through emails for additional meeting assets. Emails updated assets to team. "Did everyone get my update?" Leaves call. Monitors email for meeting notes from others. "I really want to be sure I didn't miss anything action items and to-dos from the meeting."

Has an action item coming out of the meeting. Searches for original meeting invite, attaches revisions and sends out to team.

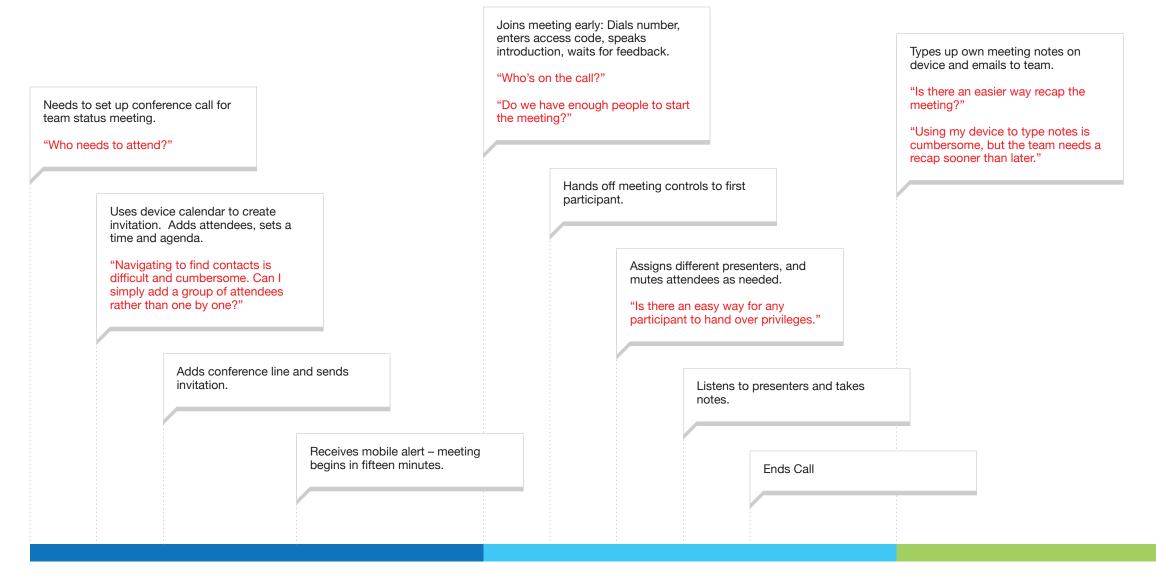
"I need an easy way to send critical follow-up with meeting attendees."

the call."

# Journey Map - C2



Davis
Silent Observer — Host→ Participant
Context — Working from Home



Pre-Call During Call Post-Call

## Persona - D



# Derrick

Persona Type Sales Guy

Any and all contacts need to be in one place to communicate quickly and effectively

#### Summary

Derrick knows his ABCs - Always Be Closing! Timely communication is the name of the game for Derrick and his team. He leverages the internal directory to manage his team meetings and communication, but finds he still needs access to his other address books. Unlike his mentor who still uses the rolodex, he has contacts on his personal Gmail Account and in Linkedln. It's taken a few years to build up this group of contacts and connections, now it's time to cash them in. Derrick is always on the go and rarely stationary in front of a desktop computer. The ability to join a conference call via audio is important, but also needs the flexibility to view / manage the web conference with his smartphone and present with his tablet. Derrick also likes to setup quick status calls with his sales team to provide updates and action items.

## **Key Use Cases**

This user needs to quickly setup a meeting with internal and external contacts

This user needs add someone to a meeting agenda not in the company directory, but part of another private contact group (i.e. Gmail, LinkedIn)

This user needs to transition from vehicle to office to maximize his long commute to get work done. But one in office, easily switch to the office environment

#### Roles

#### As a Host

Extensive experience using most all meeting tools.

Uses different meeting tools with different contacts



#### As a Participant

Easy access to meetings is most important.

Quick and easy access from the vehicle is a must have



#### **User Challenges**

Needs his tools to facilitate sales anywhere and anytime.

Combines use of mobile phone, tablet, and desktop.

Quick unscheduled discussions among contacts / teams happens frequently.

## Persona - E



# Joe

Persona Type Average Joe

Joe has knowledge of everything, but is a master a nothing. He can do a little bit of everything...

## Summary

Joe is a technical lead for a short term project. He is a specialist in the organization and moves from project to project, he likely can't use the same meeting tools he just got familiar and comfortable with. Knowing this is always an issue, he really doesn't complain to much about the hurdles of learning yet another conference tool. Joe could benefit from a quick introduction to the new conferencing tools if they were available. The lengthy email that hits the inbox is hard to parse and loaded with "just in case" information. This makes it hard to find what he really needs for the meeting - the agenda, documents, and the audio / web conference connection information.

## **Key Use Cases**

This user just wants the basic features to join a conference and get the information relevant to his updates

This user doesn't read the invite and struggles to sign in, can attend late at times.

This user may not realize certain features and tools available before, during, or after the meeting.

#### Roles

#### As a Host

Experience using several tools, but not an expert on any of them. Can manage their way around technology.



#### As a Participant

Easy access to meetings is most important. But, user is willing to discover and explore the product.



#### **User Challenges**

Really has no immediate needs, desires or loyalty to use any product.

Middle of the road user, will work around things the user doesn't understand and likely never leverages any "value add" features.