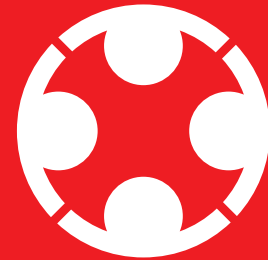




Web / Audio Conferencing Solution

Overview / Personas / Journey Maps



Hello, I'm AJ...

UX / UI Design Lead & Manager

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 shop, 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

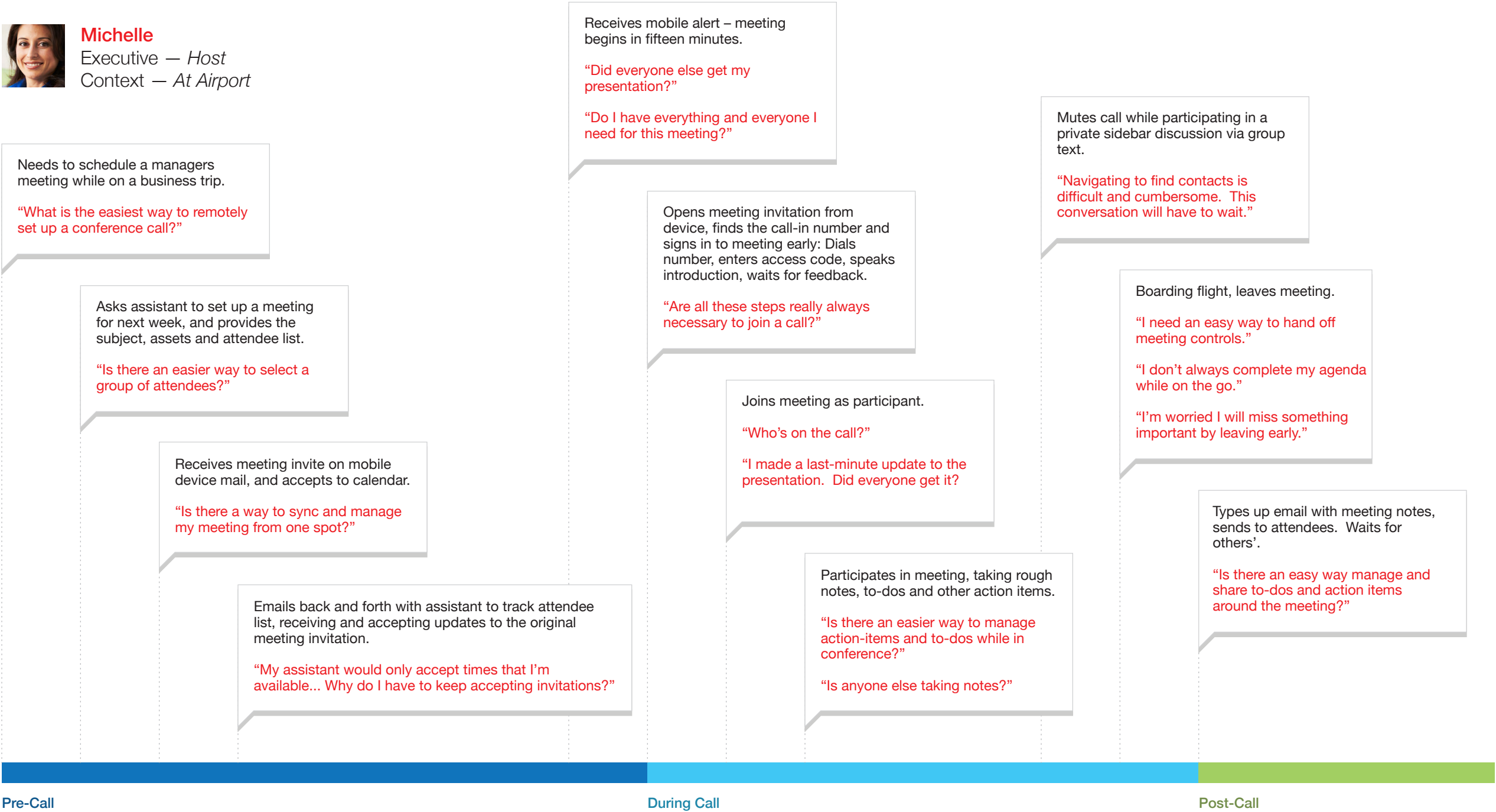
No time to learn new business tools – needs to be ready “out of the box”

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

Journey Map – A1



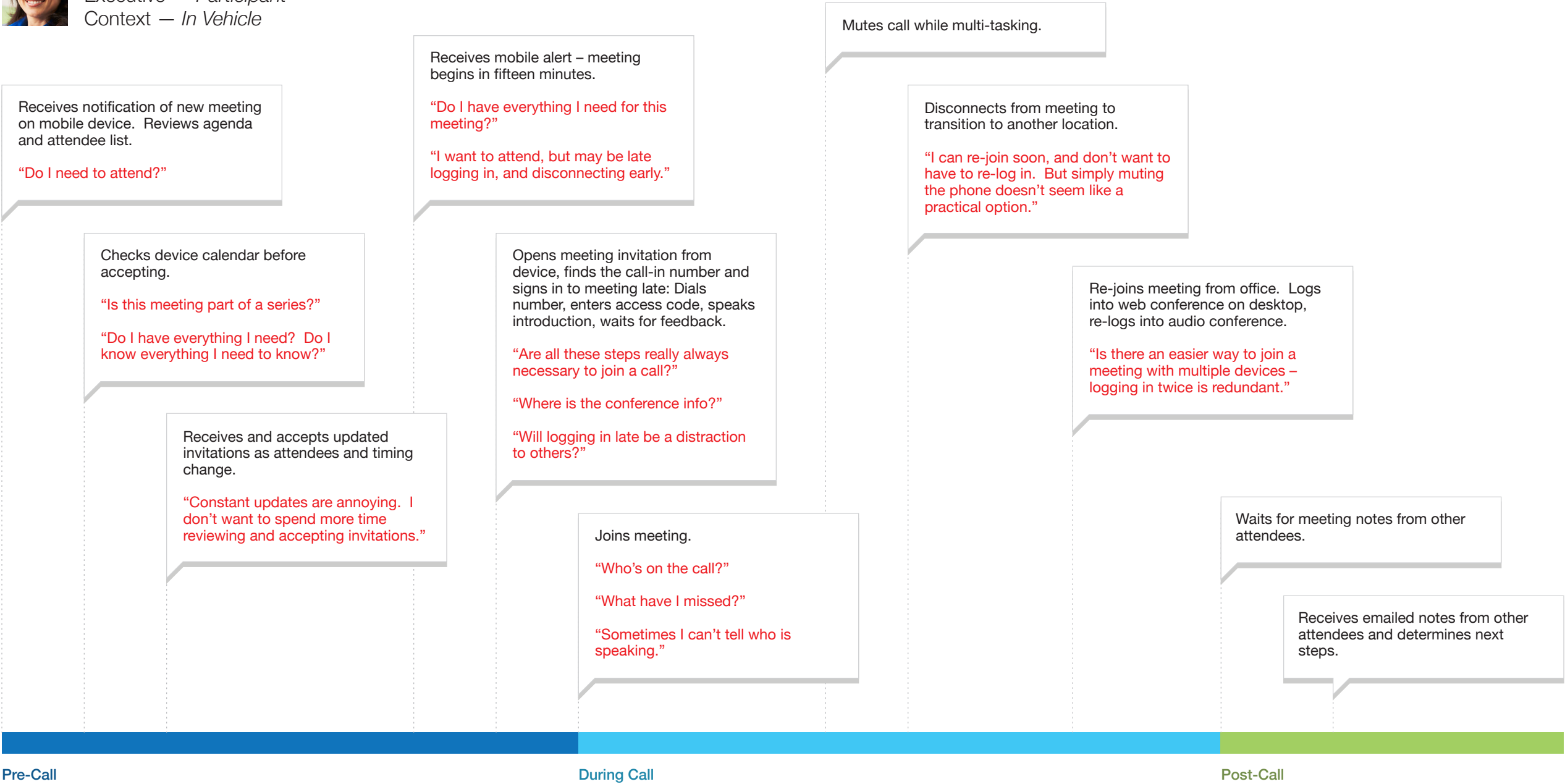
Michelle
Executive — *Host*
Context — *At Airport*



Journey Map – A2



Michelle
Executive — Participant
Context — In Vehicle



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 quickly 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

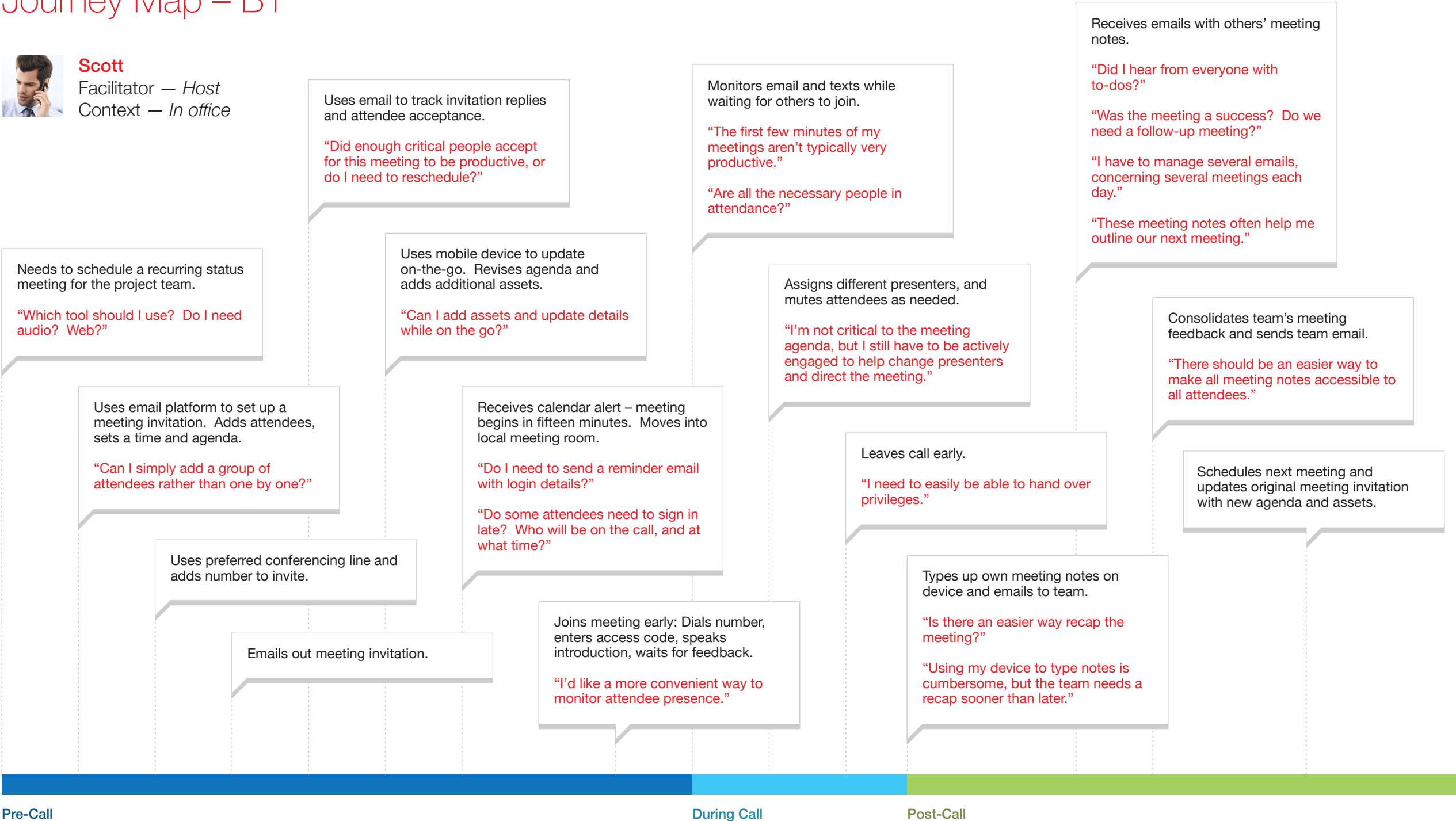
Always open to new and better solutions that might make things easier, but easily turned off by a complex learning curve.

Journey Map – B1



Scott

Facilitator — *Host*
Context — *In office*



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.

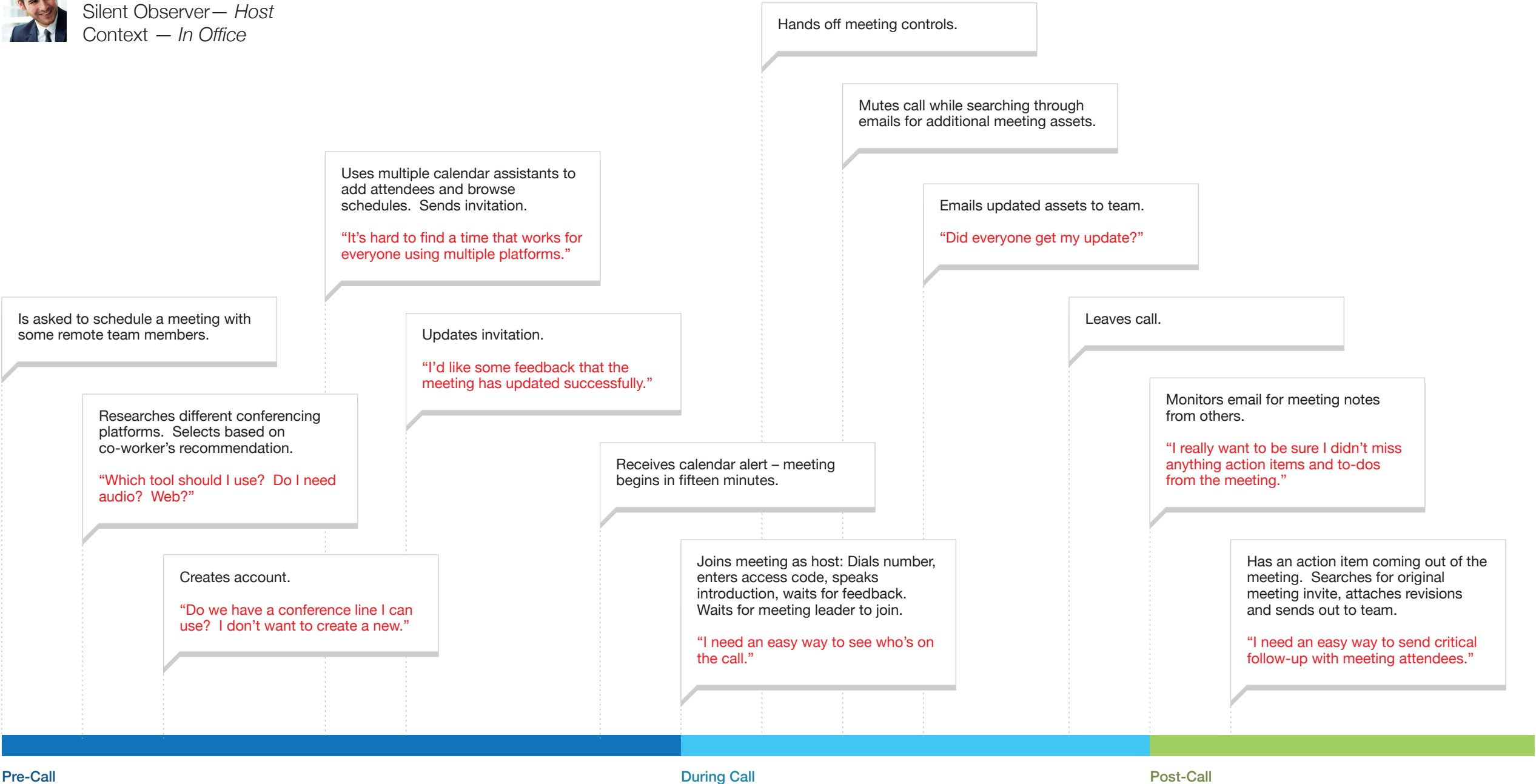
Contributions are usually minimal in meetings, but can contribute content to the agenda via email.

Journey Map – C1



Davis

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

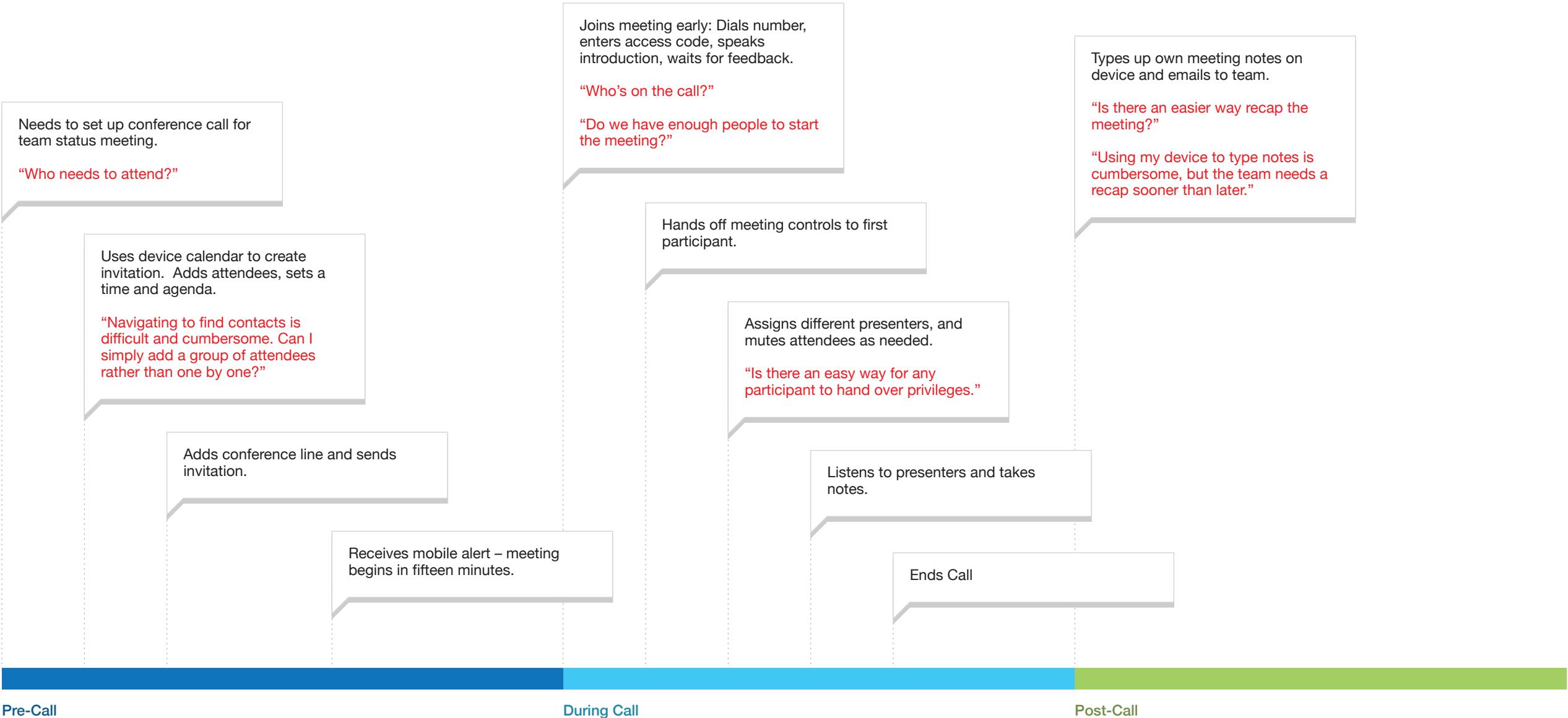


Journey Map – C2



Davis

Silent Observer — *Host › Participant*
Context — *Working from Home*



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 LinkedIn. 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.