VUI Design Boot camp
Myths of Requirements Gathering

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A Little Morning Humor....

DILBERT®

by

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I'll need to know your requirements before I start to design the software.

First of all, what are you trying to accomplish?

I'm trying to make you design my software.

I mean what are you trying to accomplish with the software?

I won't know what I can accomplish until you tell me what the software can do.

Try to get this concept through your thick skull: the software can do whatever I design it to do!

Can you design it to tell you my requirements?

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Answers to Common Questions

• How do I communicate what I’m hearing so I can make sure it’s correct?
• How do I pull the right requirements from the business?
• How can I even tell what the end-user wants?
• How can I define the end user?
• How do I build the application that the business wants?
Myth 1

• Expectations are black and white. If I build on-time and on-budget, they are going to love it.
  – If you believe this, you’re dreaming……
  – Customers have their own expectations, but sometimes even they aren’t sure what they want.
    • So many times, when speaking to experts, we expect them to read our mind, or just assume they should know what we want
  – Pulling the correct requirements may be difficult
  – Even a business may forget or not see crucial components
  – How do you solve this……
Example of Expectations
Expectations Example (cont)

• My expectations
  – I paid him to ‘fix’ my dogs
    • He would take them away, and conduct a week and a half long puppy boot camp.
  – I had done the basic command training with them already
  – I explained to him my problems, but never expressed what I wanted them to be like when I came home – just expected that he knew I wanted them ‘fixed.’
  – I wanted to come home and be the alpha in my house
Expectations Example (cont)

• What I got
  – Dogs that listened to basic commands
  – Baxter showed no issues at their home, so therefore nothing was every defined to be fixed
  – My dogs were great at home for about three days and then slowly went back to pre-puppy boot camp days
  – I did see improvements, but I was disappointed
  – He did what he felt I paid him to do, yet I was still disappointed
  – Why? Because I expected more but never told him!
Expectations Example (cont)

• What went wrong?
  – I wasn’t explicit enough in my expectations for what I wanted from the session
    • I expected him to know
  – He could have asked me the end-result question.
  – He could have explained a new solution for Baxter
    • It may have cost me more, but hire him to train him in my home
    • He at least should have suggested it
  – He could have asked me what they already knew
    • Help us to avoid ‘reinventing the wheel’
Myth 1 Resolution

• The first step to fixing this in IVR’s is the High Level Design and Context Requirements Gathering Session
  – Helps to eliminate early confusion and define high level requirements
  – This is just the initial kick-off
  – You don’t want to know every host task detail
  – You don’t want to know every decision that could possibly be made
    • Leave these things to your specification writer
Context Requirements Gathering

- A typically three day session with various members of the business
- Your time to gather as much data as possible from the business. Grab anything you can get.
- Your time to observe the business in their working environment.
- The business’ time to talk to you about what their expectations are
  - Use the Statement of work as a guide, not a bible
- The time for both of you to talk about needs/wants and begin to set realistic expectations of the system
Context Requirements Gathering (cont)

• From this you will create a high level design and a document defining the following
  – Summary of what was gathered
  – Summary of what was discussed
  – ‘Conversations’ – (dialog of the tasks)
  – Profiles

• This is your time to tell the story of your system
  – This will communicate to your customer EXACTLY what you’re about to build.
    • People use their ears for IVR’s much more than they would read for an IVR.
HLD Example

Main Menu

- Eligibility Information
  - Benefits Breakdown
- Claim Status
  - Date of Claim
- Authorizations
- Forms
  - Authorization
  - Quick Reference
  - Prescription
- General Corporate Information
  - Fax Number
  - Mailing Address
Context Requirements Gathering (cont)

• From this you:
  – Build a prototype to usability test
  – Tweak issues, retest, and create a clearer picture of your final design

• So, how do you know what to gather?
Myth 2

• Their current IVR is working great, so I’ll just make a speech version of that.
Myth 2 Resolution

• If you’re building only a speech version of the IVR system, don’t waste your time/money on speech.
• Take the time to understand where speech can be utilized.
• Understand the business objectives to using speech.
• Take the call out of the ‘call tree’ type application and into a conversation.
• Listen to actual calls to understand how the required tasks are completed.
• Take the time to discover possible new tasks for the system.
Myth 3

• It’s the basic [fill in the blank here] application. Why do I need to understand their business? I’ve done this a hundred times before.
Myth 3 Resolution

- Templates do have a place in the business, but even templates need to be tweaked.
  - Terminology between two similar businesses can be different
  - This particular business may have slightly different goals and objectives
  - Your customer base may be different
    - Example, American Express and Visa
  - Customers may be accustomed to doing certain tasks, in just a slightly different order.
    - (And that slight difference could throw them off a lot!)
Myth 4

• Corporate politics just end up wasting my time. There is NO WAY I’ll pull in other business units to get this done.
Myth 4 Resolution

• Other parts of the business are crucial to the success of your IVR
  – Find out how many other areas ‘touch’ the customers
    • Web
    • Branch (bank)
  – Marketing
    • Understand branding image and goals
  – User Research Departments
    • Get the data on who the user is
    • Find out buying/usage patterns
  – Technology
    • You need to make sure what you want to design will actually work
Myth 5

• Oh, they did user studies for the web. I’ll just pull the data from that and use it my application. Now there’s no need to do any of my own research.
Myth 5 Resolution

• Design decisions from other sources can be very helpful, but don’t take anything for granted.
  – For example, some terminology may be more understandable on a web page because of the visual aspect
    • However, once in a situation where those options are being read, it might not be as intuitive
  – Share ideas on your usability discoveries, to help build the strongest possible user experience for all channels.
Myth 6

• Touch tones are so ice-age. None of that information is going to be useful to me.
Myth 6 Resolution

• Stats about the current IVR system can be very useful
  – Discover callers usage patterns
  – Call volume
  – Containment in the IVR
  – Current automation levels

• Use this data so the new system can be enhanced
• This way you’re not reinventing the wheel
Myth 7

- There is no time for the ‘little people.’ Besides, they are just going to end up telling me about stuff that they would like to see, instead of things that would be useful.
  - ‘Little people’ meaning call center reps.
Myth 7 Resolution

• Representatives are one of your biggest assets in the requirements gathering process.
• They talk to the caller everyday.
• They know problems the callers are having
  – Whether it be with the current system
  – Or issues in general with the business
• They know the types of tasks callers do frequently.
• They have ideas on what can be done to make their job easier.
Myth 7 Resolution (cont)

• Use them as you gather your context requirements.
• Let them know you’re not there to take their jobs away!!
• Conduct a group meeting (like a focus group)
  – Use approximately 10 representatives (if possible)
  – Also include supervisors/team leads
    • Questions to ask........
• Reserve a lot of time (usually a day) for sitting with agents
  – Make sure you give yourself enough time to hit all queues
  – Make sure you’re rotating agents within each queue
Myth 8

• I’m just a VUI Designer. The ‘big’ people up top aren’t going to have time for me. I’ll just use my given resource to understand business goals/requirements.
Myth 8 Resolution

- If you have the opportunity to talk to VP’s and other executives, take advantage of it!
  - Find out their goals for the system.
  - This could be a great time to educate.
  - Question I always ask, ‘I can put a basic working application out there, and have it work great. But what do you see as the perfect application?’
  - Don’t forget that person that’s designated to help you, has a very large load on their shoulders.
Myth 9

• In the IVR world, the term ‘user’ is pretty generic. As long as I know the basics, the application should fit.

• Basics being:
  – Power User or Novice
  – Age
  – Gender
  – Demographic area
Myth 9 Resolution

• There’s a lot more to knowing a ‘user’, and defining your user(s) is a key asset in requirements gathering.

• Let me introduce to you:

Profiles
Profiles

• What is a Profile?
  – Defined as ‘persona’ in the web world
  – Can be one or multiple users of the system
  – Takes the general aspect from the word ‘user’ and puts a face, life, and goals behind the word.
  – Helps to define requirements because ‘user’ can be far too broad
  – These are living and breathing things for your requirements gathering so even as enhancements and changes come to play after development. Use these profiles to determine the best options for your system.
Profiles (cont)

• What consists of a successful profile?
  -- Has a name, face, age, and city of residence
  -- Created so you can feel with the person
    • It's not just a description, but a story behind it
    • Allows developers/designers to relate
  -- Can have goals or attributes
  -- The persona must be believable
    • Quotes, rich details, and even photos
  -- Truly replicates the primary user(s) of your system
    • This is who you’re designing the system for
Profiles (cont)

• Don’t get stuck in the demographic driven profile
  – The basic demographics may be important.
  – However, it could be a task driven profile vs. a demographic driven profile.
  – Examples?
Myth 10

• Callers don’t even know what they want. So they’ll use whatever I build them.
Myth 10 Resolution

• Callers may not know exactly how they want to get the information.
• However the average caller will always say the same thing when asked what makes a satisfactory call:
  – They want to get the information they’re calling for
  – And they want to get that information as quickly as possible
• It’s up to you to take the given requirements and create that experience for the caller
Myth 11

• When setting up tasks to use in the system, Remember the word ‘Training’…..If it’s too difficult to understand, we’ll just train the user.
Myth 11 Resolution

• Training can work with software, maybe even some websites.
  – Very, very rarely is ‘training’ a term that should be used in the IVR world.
  – This doesn’t mean you can’t use clues for the next time a caller uses the system.
    • ‘Just to let you know, next time you can say ‘account balance’ right away.
  – If it’s going to be too difficult to get through, or if it’s too difficult of a task.....
    • LEAVE IT TO A REPRESENTATIVE!!!
Defining the Right Tasks

• Avoid ‘training’
• Work to define problems
  – This leads you to building solutions
• When you concentrate on problem solving, you avoid throwing in the needless extras.
• Make sure as you design the task, that it really is the way users complete these tasks with representatives
• Use data from current systems and call centers
  – Understand what’s done most frequently today
  – Where are callers struggling?
Questions/Comments

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