



Scaling up a global UX research team at Zendesk



Veevi Rosenstein, PhD

DIRECTOR OF UX RESEARCH

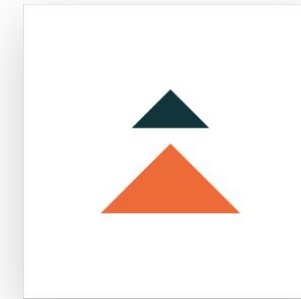
 @UXRESEARCH



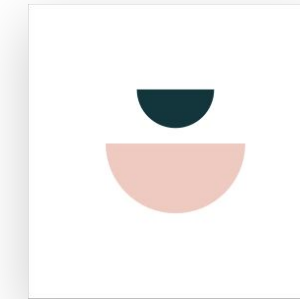
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zendesk

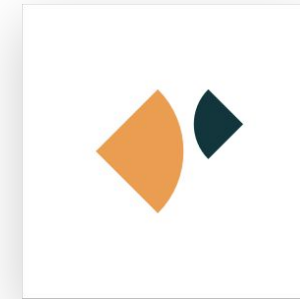
support suite



guide



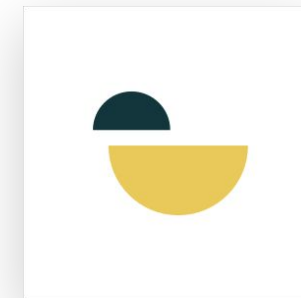
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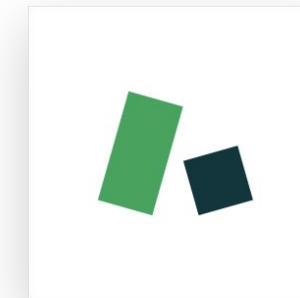
chat

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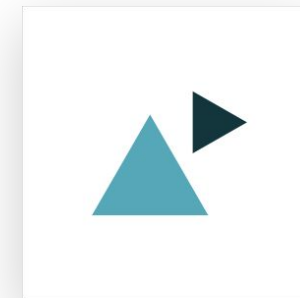
sales suite



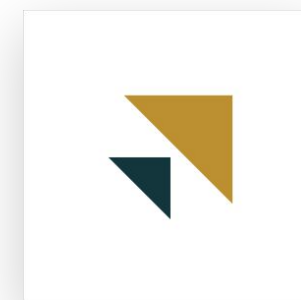
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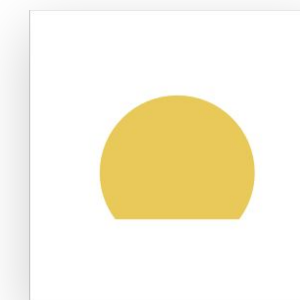
support



explore



sell



sunshine



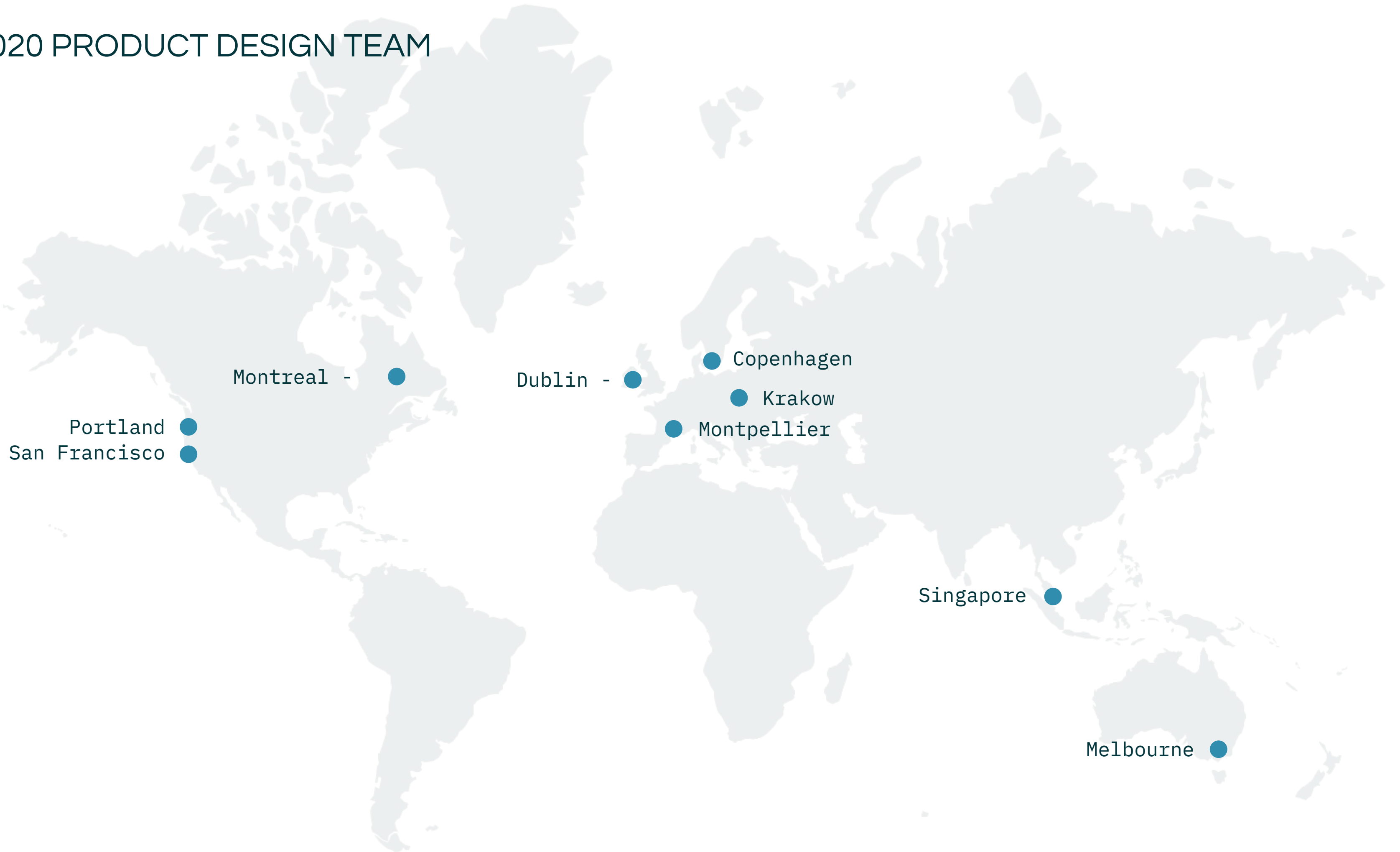
sunshine
conversations

160,000 +
paid customer
accounts in **160+**
countries

4,000 +
employees in
20+
area offices

About **120**
Creative team
members in **10**
locations

2020 PRODUCT DESIGN TEAM



STAFF RATIOS IN MID- 2018

1 RESEARCHER IC



28 DESIGN ICs



STAFF RATIOS IN 2020

1 RESEARCHER IC



~12 DESIGN ICs



START

WHAT SHOULD THE UX RESEARCH TEAM START DOING?

- Working with the highly influential Voice of Customer (VoC) program
- Leverage on Sales and Success for their in-depth learnings with our enterprise customers?
- UX Research "Top 5", that's aligned with product strategy/roadmap
- Customer participant recruiting database
- quarterly field days (sharing research process with PM/Eng/PMM)
- Shadowing Advocacy and Documentation (shadowing)
- More qualitative w participants from diverse departments
- Regular customer check-ins beyond specific projects
- Rolling studies - continuous access to customers
- Research playbooks
- bring user research rigor into brand, how users are reacting to brand
- Garden usage per Product
- Work with advocacy on the advocacy incubation project
- Defined processes / best practice for how we should reach out to customers
- Garden / components usability research
- Better research with data
- internal EAP/beta testing with advocates, see jennifer chang's initiative
- Clearer line between responsibilities of designers and product managers
- Inclusive research (e.g. people with a11y needs)
- Reusing research from other projects
- Being a resource for "building the thing right"
- Train designers on proper research methods
- Garden is difficult to test in isolation
- Ways to login to accounts with whitewashed activity
- QUANT!

STOP

WHAT SHOULD UX RESEARCH STOP OR AVOID DOING?

- Contacting only the same set of customers
- Research is sometimes the first thing to be cut under time pressure. Educate team on lean research techniques.
- Duplicating effort by researching in isolation
- And asking the same questions
- Where do I find everything!?
- Wasting research by not taking action on it

CONTINUE

WHAT SHOULD THE UX RESEARCH TEAM CONTINUE DOING?

- Joint research between PM and designers
- Some documentation for research (More pls)
- Research helping to watch out for duplicated research
- Camera obscura
- The templates and existing playbooks
- Design and research being encouraging
- Review Product (Garden) Questionnaires
- It's clear the whole team places a lot of importance on effective research
- Hiring more researchers!
- All designers take part in research, and take responsibility for it
- Partner with other departments on research projects, ie Success
- Streamlining the recruiting process
- research practice is valued and respected
- Hypotheses, Validating them, Metrics to measure
- The enthusiasm and thirst for research is real!
- Designers & PMs are directly involved in research.
- Starting (almost) every project with UX research

Key issues

Participant recruitment

Time to value

Project coordination

Retention of insights

Rigor & credibility

Space to work



MISSION

What User Experience Research does for the Zendesk product team:

UX Research helps product teams understand and empathize with users' needs. We help teams make better decisions by discovering and sharing user insights that guide product design and strategy.

- Discover and share user insights
- Help evaluate concepts and designs
- Recommend methods, give feedback on study plans, questionnaires and materials
- Make insights easier to find and share
- Help schedule and track research participants
- Provide training on research tools and techniques

Today's talk

Participant recruitment

Time to value

Rigor and credibility



Participant Recruitment and Time to Value

Some participant recruitment pain points



- No direct access to agents - only decision makers and admins
- No participant incentives other than company swag
- Difficult to identify users of specific features
- Account Managers gated access to customers
- Hard to screen out customers who did not want to be contacted
- Hard to screen out customers who did not want to be contacted

 Headcount 

If you love something,
give it away

HACKATHON ENTRY

ZenReach

Big Research Project



Deadline: 10/01/2018

@RamonaBlackwood @FarheenNoorie @AlexSong

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Orci phasellus egestas tellus rutrum tellus pellentesque eu tincidunt tortor. Faucibus a pellentesque sit amet porttitor eget. Nulla facilisi nullam vehicula ipsum a. Id leo in vitae turpis massa sed elementum tempus.

Approved Customer List

<input type="checkbox"/>	Name	Monitor	Status	
	ClubReady	Link	Email sent	↗
	ClubReady	Link	Email sent	↗
	ClubReady	Link	Email sent	↗
	ClubReady	Link	Email sent	↗
	ClubReady	Link	Email sent	↗
	ClubReady	Link	Email sent	↗
	ClubReady	Link	Interview scheduled	↗
	ClubReady	Link	Done	↗

Exit project

Contact approved customers

HACKATHON ENTRY

ZenReach



ADDRESSING RECRUITMENT AND TIME TO VALUE PAIN POINTS

Tools in our UX Research Toolkit



Click tests, cardsorts and
IA validation



Built in research panel, prototype
validation, remote interviews



Panel management, screeners
and surveys

Building a research panel

zendesk

Log in Product support Company Contact us English
Products Pricing Solutions Demo Services Resources Free trial

ZENDESK EXPERIENCE RESEARCH PANEL

We need your voice

Our goal is to design simple, beautiful products, but we can't do that without talking to the people who actually use them. Join our Experience Research Panel to help shape the future of our products. Just complete this brief survey and our team will match you to the right studies.

[Sign up here](#)



What you'll get out of it

Invitations to paid and unpaid research studies, and maybe even some Zendesk swag

Direct connections to our product design team and the opportunity to give the first feedback on our latest innovations

The inside scoop on what's cooking at Zendesk, and early (beta) access to new features and products

Creative / UX Research

Rolling Studies

Created by Emma Strybosch
Last updated Apr 02, 2020 • Analytics

Rolling Studies are a series of studies that focus on two different streams of users:

- Developers
- Agents

These ongoing research sessions follow a regular cadence. Each monthly study can cover a mixture of topics and products, allowing multiple teams to get answers quickly.

WHY DO A ROLLING STUDY?	<ul style="list-style-type: none"> • A timely way to get feedback without having to do a full study. • User base expertise researcher for each study type.
WHAT IT IS AND ISN'T	<p>It is quick and flexible. It's ideal for usability type questions and additional feedback loops for features in development. Questions and tasks need to be clear and concise, as these studies can cover a variety of subjects, sometimes unrelated.</p> <p>It isn't suitable for when there is more ambiguity or a niche segment type or the study requires a high level of complexity.</p>
HOW DOES RECRUITMENT WORK?	<p>The rolling studies will be recruited through a generic screener by the research team, to ensure fast and painless recruitment.</p> <p>Each study will be filled with 3 to 4 participants of each User Profile in the experience stream that you're interested in learning more about.</p>
HOW DO YOU GET INVOLVED	<p>If you have questions either get in touch via the Slack channel #uxr-devx-rollingstudies or email uxresearch@zendesk.com</p>
WHICH ACTIVITIES BEST SUIT THESE STUDIES	<p>Rolling studies are geared towards evaluative activities, that sit within the third diamond of the software development cycle.</p> <p>These activities can include:</p> <ul style="list-style-type: none"> • Usability Evaluations • Focused Interviews • Concept Studies

To get started:

EMAIL: uxresearch@zendesk.com

with the subject line:

DevX Rolling Studies
Agent Rolling Studies

CURRENT DEVX STUDY

CURRENT AGENT STUDY

Guidelines for obse

TEMPLATES:

- Moderation Guide
- Data Collection
- Interpretation data
- Insight Template

Today

April 2020

Sun	Mon	Tu
29	30	31
5	6	7
12	13	14

Piloted 1 Rolling Studies program in late 2019 with developers

2020.03 Rolling Studies Agent Workload Management

Research Goal: Validate assumptions around the sorting and IA of the conversation list.

KEY THEMES

The 'Accept' button was successful in grabbing user attention. All participants expected to click the button to pick up a chat conversation.

A new Whatsapp chat notification might have to create destruction for some users. Consider notifications being optional, letting users decide to have it or not.

Having two CTAs – "Send" and "Submit" created confusion as to how to take action, or what exactly that action is

Chat conversations were prioritized over emails by all users. Due to the real-time nature of the chat conversation, agents tended to reply to them as quickly as possible.

"Urgent should be for chat tickets and then go to high for email tickets." P5, Omnichannel Agent (ENT)

It was also secondarily important to be able to sort the conversation list by Priority, SLA and Channel

Added 3 new rolling study programs - Admins, Agents and Prospects

Rigor and credibility

Start with the basics

INTERVIEW TRAINING: ROLE PLAYING EXERCISE

GOAL

Learn about the last big home technology purchase made by the informant

ROLES

Interviewer & Note Taker + Informant

Follow the instructions on the sheet

Spend up to 10 minutes on the interview



MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
<i>Visit Manila</i>	<i>Visit Singapore</i>	<i>Travel home</i>	<i>Dublin</i>	
<i>Observe Outsource Agents</i>	<i>Agent Workshop With In-house Agents</i>		<i>Design studio with In-House Agents</i>	<i>Design solution</i>

RESEARCH CREDIBILITY

Retention of Insights

Analytical Rigor

Efficiency



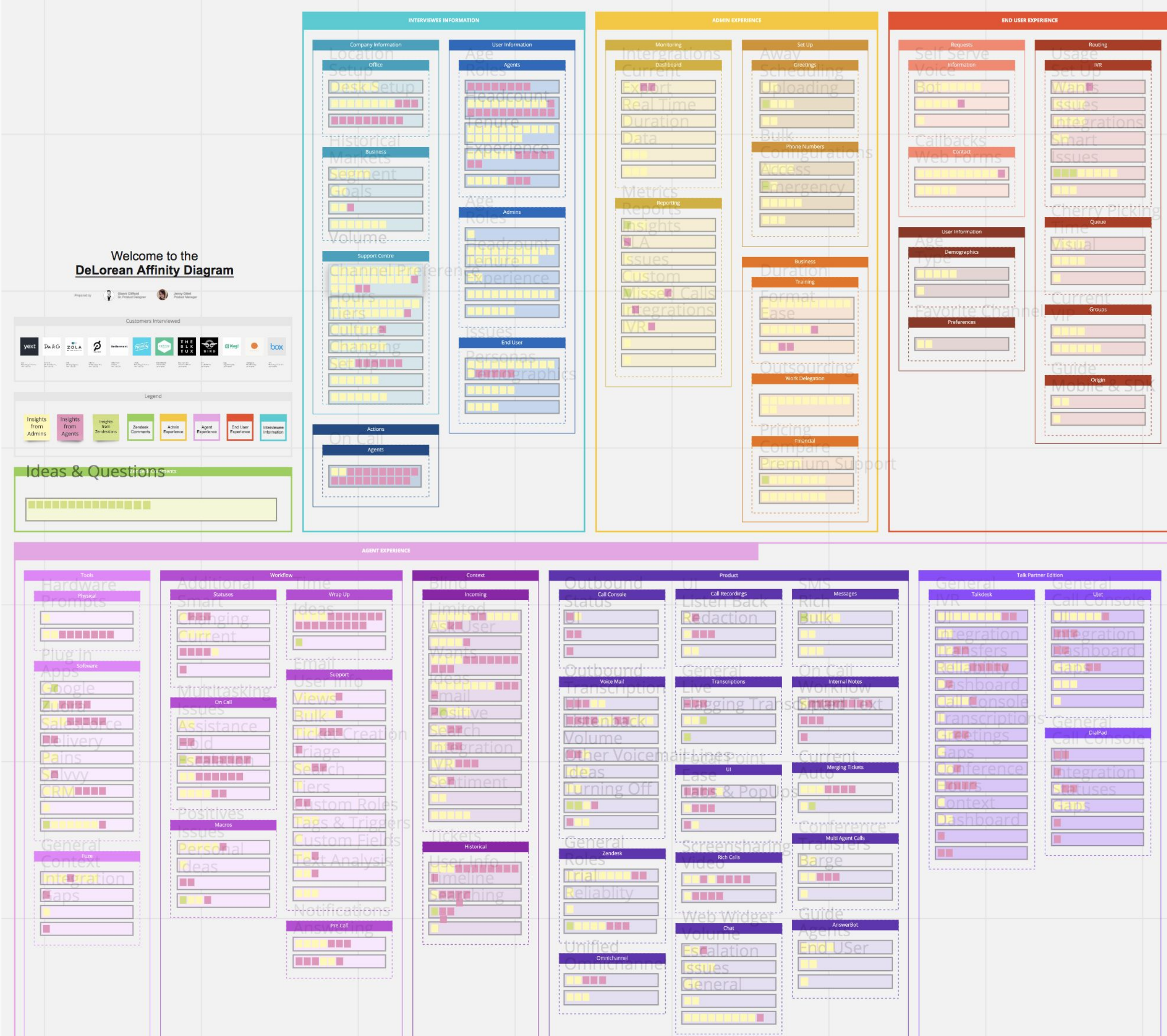
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GROWING SKILLS ON A DISTRIBUTED TEAM

Coach and empower local evangelists and allies

GROWING SKILLS ON A DISTRIBUTED TEAM

Coach and empower local evangelists and allies



Let them run with it.

#	Customer	Segment	Date	Informant	Role	Q / I	Data	Product	Voice Int.	Source
#1		Meditation App	31st July 2018		Admin		Big customer, millions of users, global 190 countries		Talk	Read
#2		Meditation App	31st July 2018		Admin		The mission of Headspace is to improve health in the world		Talk	Read
#3		Meditation App	31st July 2018		Admin		I have Zendesk previous experience		Talk	Read
#4		Meditation App	31st July 2018		Admin		I manage our Customer Experience Specialists		Talk	Read
#5		Meditation App	31st July 2018		Admin		One of our biggest goals is keep up with our customers		Talk	Read
#6		Meditation App	31st July 2018		Admin		Our customers are young, modern and hip (millenials)		Talk	Read
#7		Meditation App	31st July 2018		Admin		We need to be agile		Talk	Read
#8		Meditation App	31st July 2018		Admin		We have a small percentage of customer who need a special treatment because they are not very tech		Talk	Read
#9		Meditation App	31st July 2018		Admin		We are going to expand to new markets (portuguese, german, etc)		Talk	Read
#10		Meditation App	31st July 2018		Admin		We have 30 to 35 agents / admins		Talk	Read
#11		Meditation App	31st July 2018		Admin		The average tenure of an agent is 1 year		Talk	Read
#12		Meditation App	31st July 2018		Admin		1% of tickets are voice	Talk	Talk	Read
#13		Meditation App	31st July 2018		Admin		16 agents are T1 based in Oregon		Talk	Read
#14		Meditation App	31st July 2018		Admin		T2 agents in LA they go through chats and emails to troubleshoot issues	Omni	Talk	Read
#15		Meditation App	31st July 2018		Admin		Onboarding is 1 month, 2 weeks training and 2 weeks of shadowing		Talk	Read
#16		Meditation App	31st July 2018		Admin		Agents in LA normally do not have too much experience in doing support	Support	Talk	Read
#17		Meditation App	31st July 2018		Admin		Training in classroom style		Talk	Read
#18		Meditation App	31st July 2018		Admin		Our agents use views a lot (based on keywords)		Talk	Read
#19		Meditation App	31st July 2018		Admin		Custom fields are important		Talk	Read
#20		Meditation App	31st July 2018		Admin		40% of our tickets are about plan, subscription and billing	Support	Talk	Read
#21		Meditation App	31st July 2018		Admin		We also have a lot of troubleshooting tickets		Talk	Read
#22		Meditation App	31st July 2018		Admin		100% of calls go to voicemail	Talk	Talk	Read
#23		Meditation App	31st July 2018		Admin		Voicemail ask email and name to identify customer	Talk	Talk	Read
#24		Meditation App	31st July 2018		Admin		We use outbound calls for escalations	Talk	Talk	Read
#25		Meditation App	31st July 2018		Admin		All agents in LA are Talk Agents	Talk	Talk	Read
#26		Meditation App	31st July 2018		Admin		In LA we have 1 agent doing triage on our voicemails	Talk	Talk	Read
#27		Meditation App	31st July 2018		Admin		It is hard to find customer from voicemails and transcriptions so they need to call back the customer to identify the customer	Talk	Talk	Read
#28		Meditation App	31st July 2018		Admin		500 to 600 voicemails a month	Talk	Talk	Read
#29		Meditation App	31st July 2018		Admin		Sometimes we need to keep retrying to reach our customers via phone (customer not available, etc)	Talk	Talk	Read
#30		Meditation App	31st July 2018		Admin		We use help center a lot - 200K visitors a month	Guide	Talk	Read
#31		Meditation App	31st July 2018		Admin		We have interest in request a callback feature if we could do that in only certain pages from our app	Talk	Talk	Read
#32		Meditation App	31st July 2018		Admin		We use Solvy integrated with Zendesk, AI tool (like AnswerBot we are moving to AnswerBot)	AnswerBot	Talk	Read
#33		Meditation App	31st July 2018		Admin		Cool feature Solvy has is the advanced dashboard	AnswerBot	Talk	Read
#34		Meditation App	31st July 2018		Admin		Solvy is being widely used and needed	AnswerBot	Talk	Read
#35		Meditation App	31st July 2018		Admin		We like that Answerbot gives feedback to reiterate on the articles	AnswerBot	Talk	Read
#36		Meditation App	31st July 2018		Admin		Zero screen time is important to us (meditation)		Talk	Read
#37		Meditation App	31st July 2018		Admin		Our apps are now on smart speakers so we are open to use Google Home and Alexa for support		Talk	Read
#38		Meditation App	31st July 2018		Agent		We use mac air laptops with external monitor		Talk	Read
#39		Meditation App	31st July 2018		Agent		I use a cheat sheet while on calls to keep me on track		Talk	Read
#40		Meditation App	31st July 2018		Agent		We don't prioritise any apps, we have only zendesk opened on screen		Talk	Read
#41		Meditation App	31st July 2018		Agent		I do triage of tickets	Support	Talk	Read

ADMIN PROFILES

DEPLOYMENT ADMIN

Triggers

1- ?

Agents

10 + - 100+

They are tasked with setting up a Zendesk instance - most likely their company's first. This admin may have used Zendesk in their previous job. They may not have the benefit of a success agent and are learning as they go.

WHAT THEY DO

Some admins are starting from scratch. They are in charge of setting up one or more customer service teams, and, because of the size and maturity of their organization, may be involved in the buying decision.

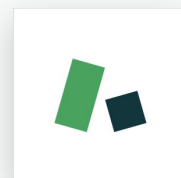
Setting up Zendesk may not be their primary responsibility. They may set up initial structures and standards for help center content.

“ Zendesk is only one of the hats I wear here. We are heavy support users and my job was to build out Zendesk from scratch”

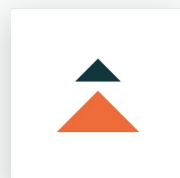
Alyssa- Admin - Financial Services Company

WHAT THEY NEED

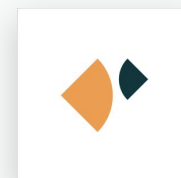
- **Training** - general preparation for optimizing their Zendesk instance - particularly in setting up:
- **Preprocessing** - being able to ID requests accurately so they can be routed correctly.
- **Explore** - they have some analytics experience but will most likely hand over this responsibility to an analyst.
- **Knowledge base** - so that requests can be solved efficiently.
- **Custom Fields** - to make routing work seamlessly with the goal of optimizing customer paths.
- **Roles and permissions** - setting up access rules, especially for agents.



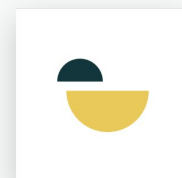
support



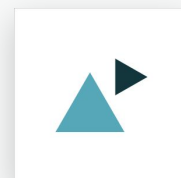
guide



chat



talk



explore

GETTING HELP FROM UX RESEARCHERS

Submit a ticket

uxresearch.zendesk.com

You can also chat with the UXR team on Slack: #ask-uxresearch

About UX Research at Zendesk

Who we are, what we do, and the assistance we can provide.

Request a UX Research Consult

Have an idea but don't know where to begin? Learn how to get help here.

UX Research Playbook

Planning a project from start to finish.

UX Research Project Library

Insights Library

Coming soon!

Tools and Additional Resources

Results



850+

Customer 1-1
study sessions

750+

Individual
UserTesting
sessions

250+

Unique durable
insights recorded

15

data - backed
user profiles
delivered

Final thoughts

Building for scale means building bridges, not walls



Start with empathy. Listen.
Build relationships. Accept and offer help.



Have a **plan for growth.** Prioritize tools and frameworks that will scale with you.



Share your vision for the team, your progress, and impact. Adapt plans to changing needs.



Teach what you know to extend your impact. Help others succeed and grow their careers.



thank you

VEEVI ROSENSTEIN
@uxresearch

zendesk