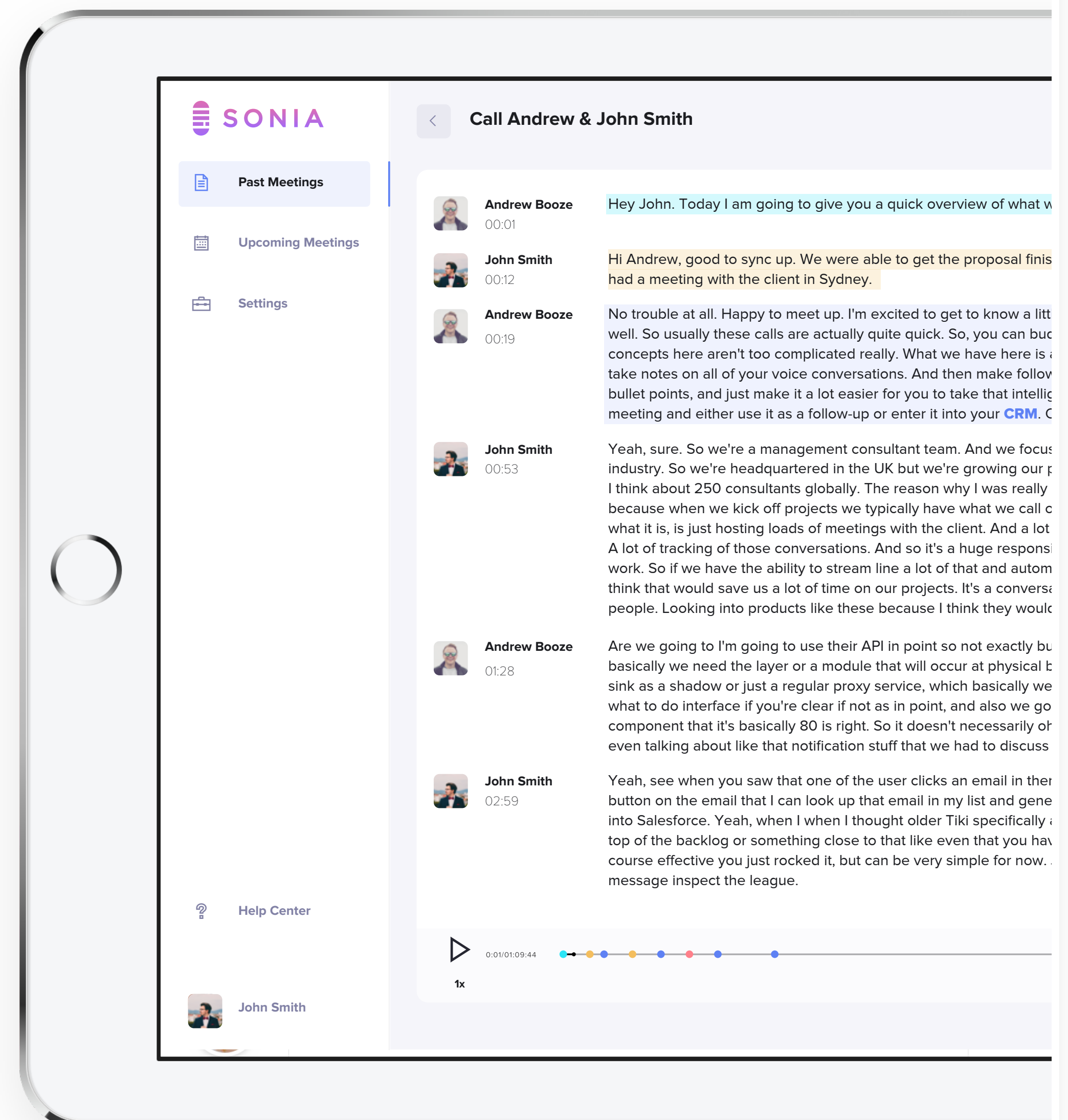




Sonia is a meeting assistant that records, transcribes and summarizes conference calls.

Sonia utilizes proprietary Artificial Intelligence models to produce best-in-class meeting summaries for its users.



Brandon Finn

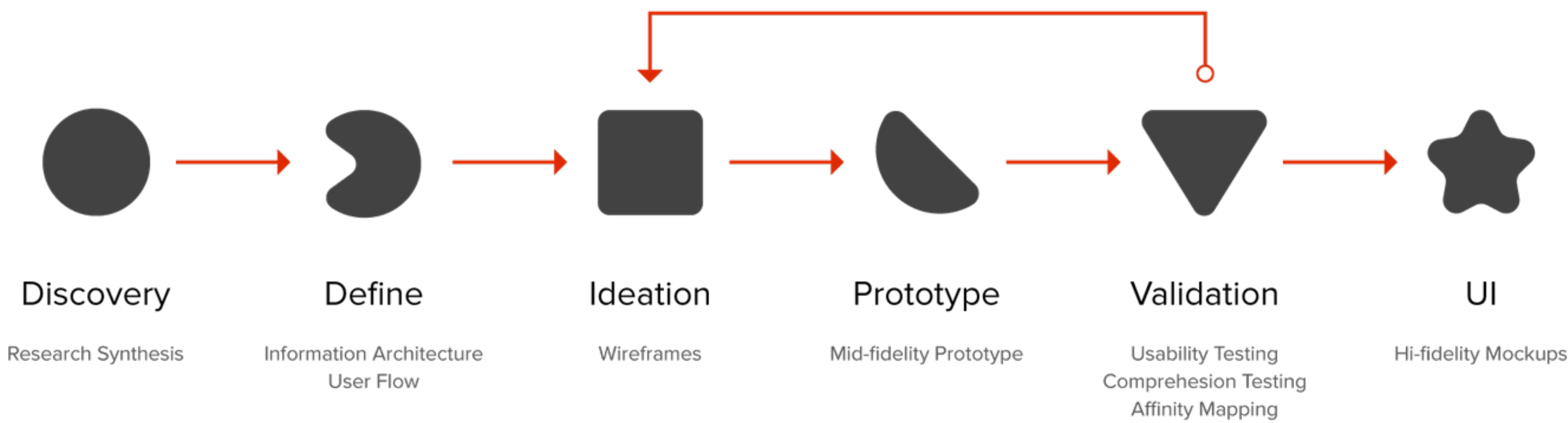
Head of Product, Sonia.com: 2017-2020

In 2017 I was brought into Sonia as a UX designer to help refine the designs from an external agency that were in the process of being implemented. Over the next 3 years, I grew to lead the product team and successfully launch the product as well as many new and innovative features.

FOUNDATION

Discovery and Design Roadmap

My approach to life and design, is all about process. Throughout this case study, you will notice that all the projects follow this overall process:



PROCESS

Summary/Overview:

State of the app was an MVP built by an agency with no testing or development customers. My job was to use design to guide the direction of the product to a successful launch.

Problem:

There was no Design Process or User Research process in place, and no users to validate any hypotheses.

Goal:

Build a design process from scratch that would be structured enough to keep us on the right track and flexible enough to grow with the expanding user base and feature set in the coming years.

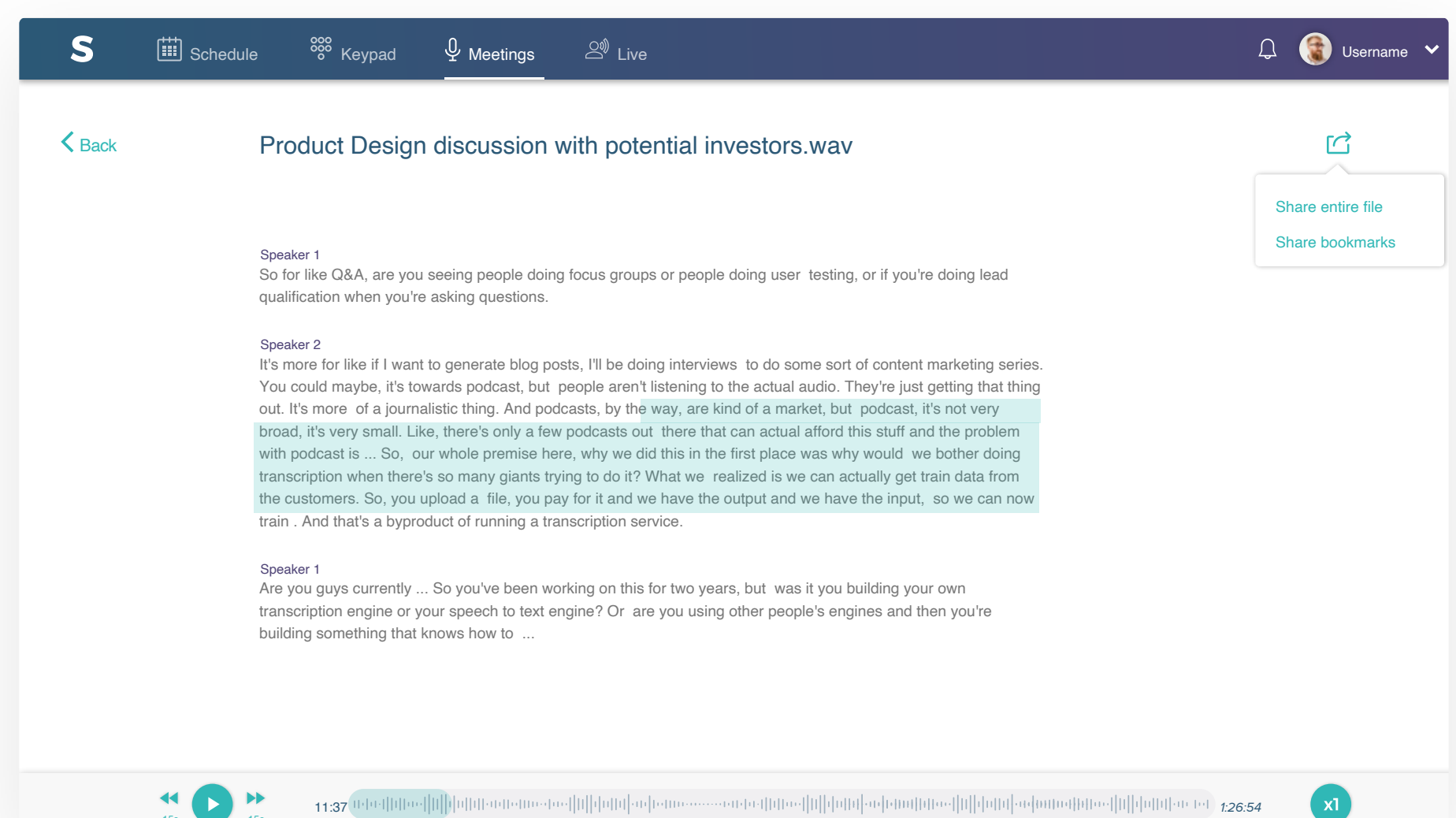
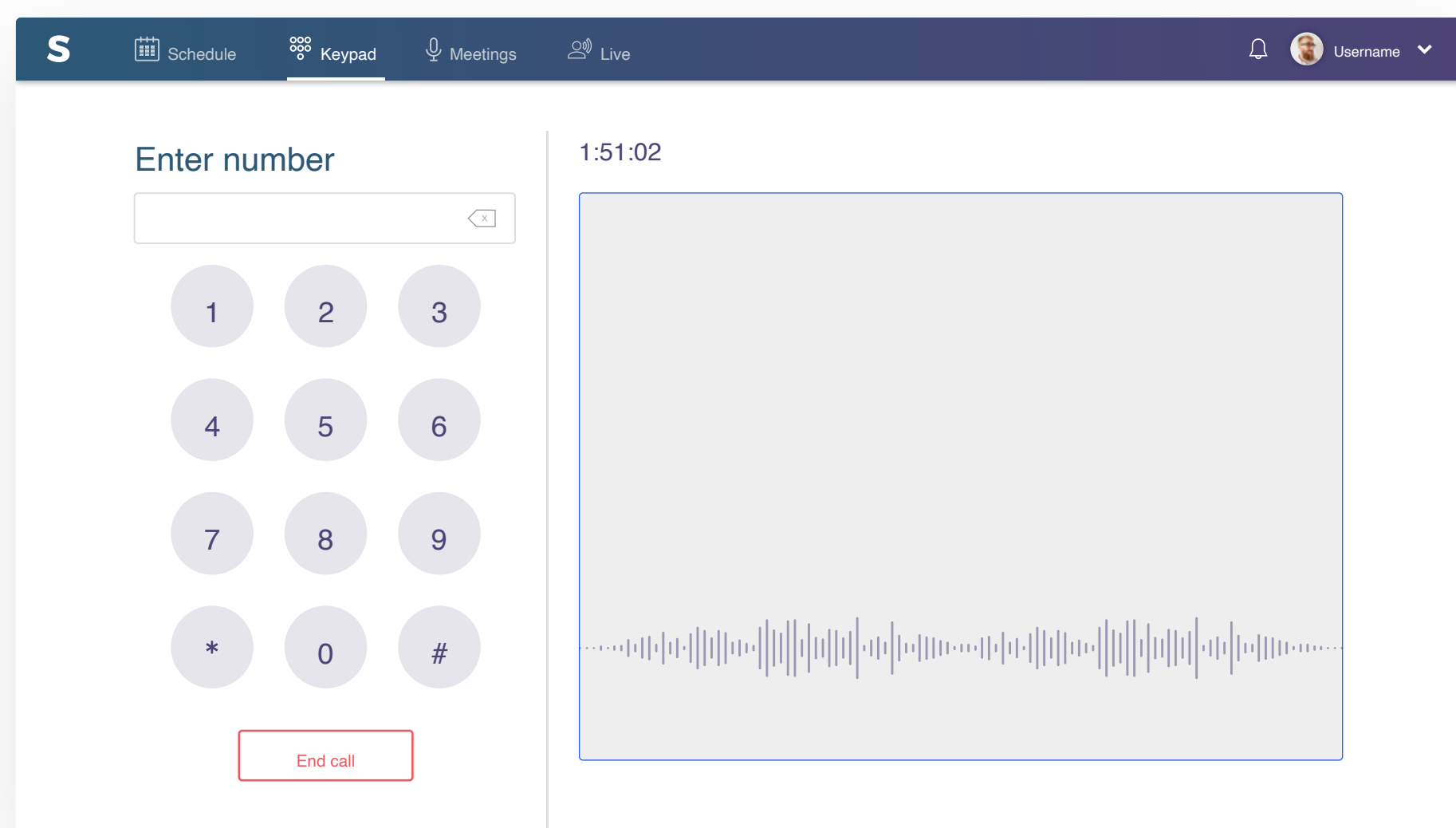
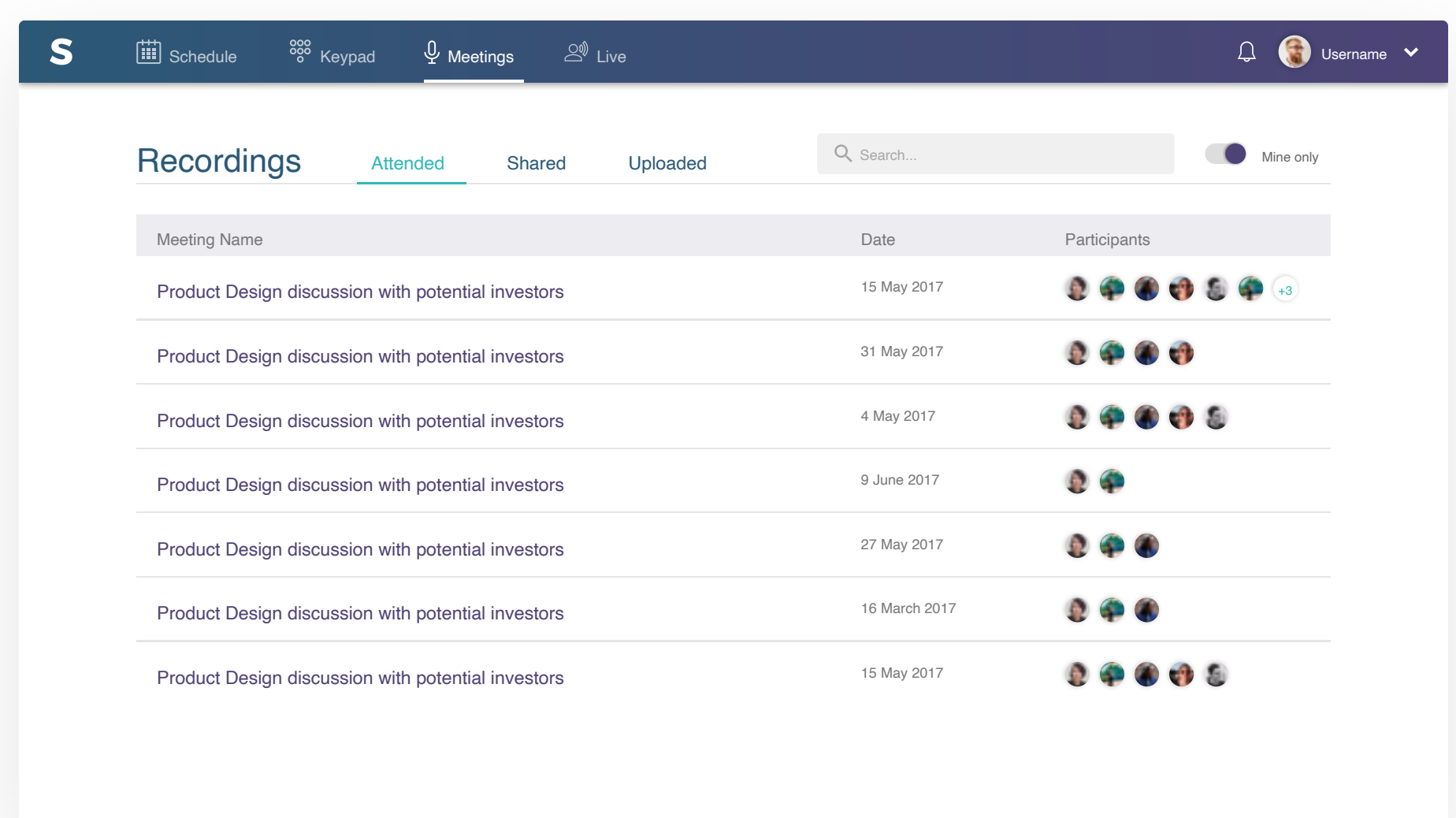
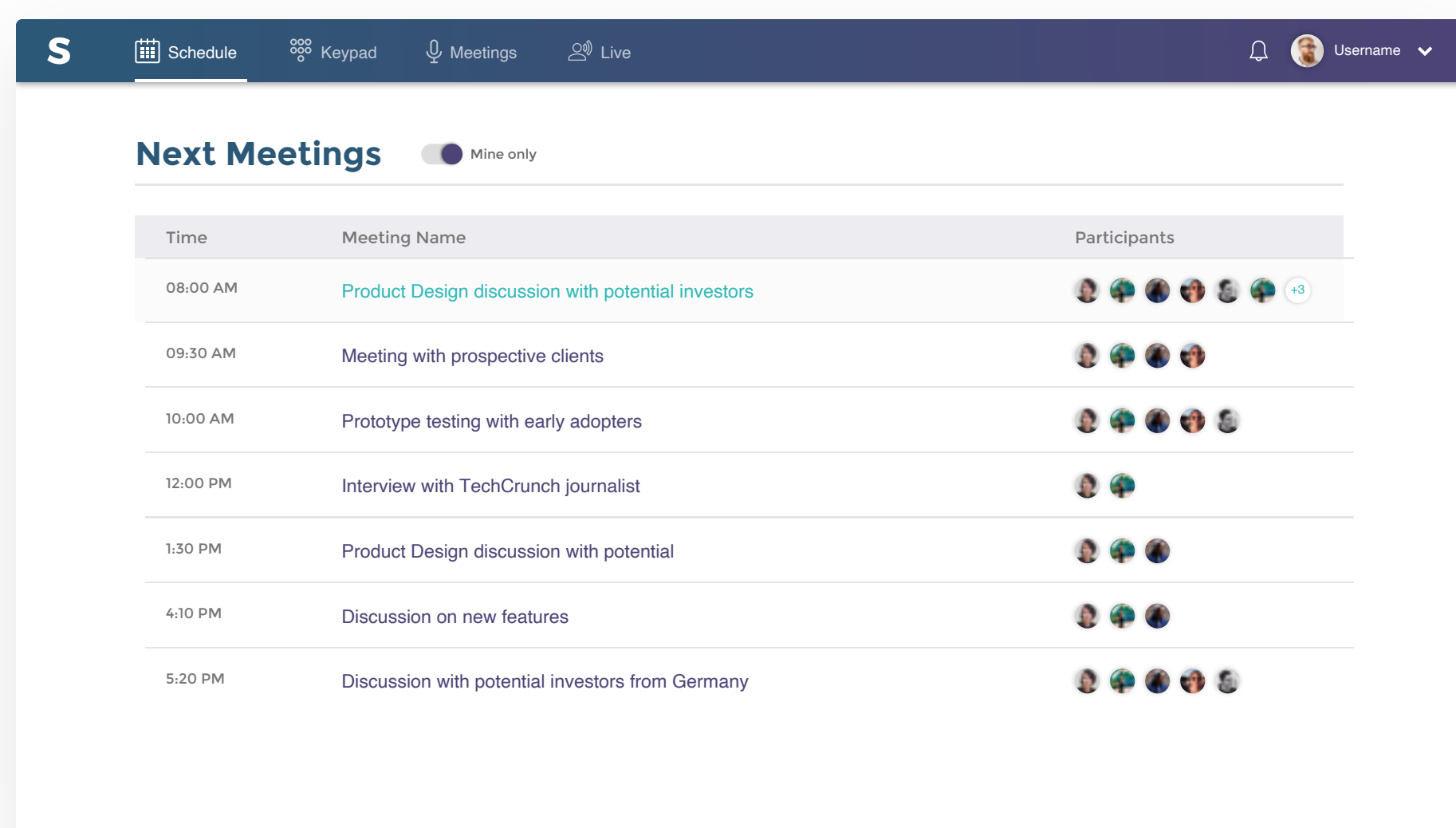
Scope:	Technology Used:	Target Audience:	Deliverables
Research	Google Chrome, Notion	B2B Customers	Design Roadmap

NOT GOOD

Existing Designs

The existing designs had some major flaws in my eyes. I really don't like them in any respect. I do not believe that a tierd horizontal navigation structure is a very wise choice for a web app. This navigation left little room for later expansion, or new tabs, and would collapse as the browser changes size.

The colors and fonts look stale and some of the repetition of UI structures suggested lazy programing, rather than intentfull design.



JOURNEY BEGINS

Discovery

Before we can design, we must first seek to understand. The key to understanding is research. So before I could get started on my re-design of Sonia, I needed to understand her better: understand the competition, the technology, the market and the users.

RESEARCH

Competitive Research:

The AI meeting assistant space is very sales heavy. The leaders Chorus.ai and Gong.io are specifically designed for sales training. There are some solutions that focus on summarization, notably Voicera (acquired by Sysco) and Fireflies.ai, among others, but they are also focused on sales as the primary vertical in their ad copy.

Technology Research:

One of the first things I did was schedule a meeting with our CTO to better understand the nature of the technology we were working with. What I learned is, ML needs lots of data:

"AI runs on data"

And in many senses, the space is in a land grab for data more than it is for user growth, because the quantity and quality of data will end up being the deciding factor on how effective your ML model can be.

Market Research:

I also met with our VP of sales, and found we had a pipeline of 120 SQLs that expressed interest in using the product (market validated need). They fell into 4 persona types:

Finance
Insurance
Sales
SMB

I dug through the CRM and began reaching out to them for persona development interviews.

USER RESEARCH

Discovery

After researching available second hand sources, it is time to go out into the field and do some research of our own. I used the list I gathered from our CRM to conduct persona development and JTBD job stories based research.

USER RESEARCH

Personas:

SMB Persona: Internal company teams of 4-10 people across all divisions such as marketing, management, HR, engineering and product. Meeting structure consists of internal stand ups and occasional external meetings with vendors or clients.

Sales persona: Meetings are usually 1:1 with a prospect, and information needs to be handed off to other members of the sales org as the account progresses through the funnel.

Finance Persona: Meetings are usually 1:1 with existing clients and prospects.

Insurance Persona: Meetings are usually 1:1 with existing clients and prospects.

JTBD Job Stories:

Universal:

"I need to make sure I remember to do everything I agreed to on the call"

SMB:

"I need a summary of my meeting to share with everyone on the call"

"I need to be able to hold clients accountable to things we agreed to on the call"

Sales persona:

"I need a quick and easy way to hand off the information from a meeting to the next person on the sales team"

Finance Persona:

"I need to pass on specific information to my team about a clients needs and information that could effect his account"

"I need to cover myself for an audit"

Insurance Persona:

"I need specific information when submitting a policy application or claim"

"I need to cover myself for E&O Risk"

USER RESEARCH

Discovery

The final piece of research was to uncover specific pain points for each of our personas.

USER RESEARCH

Pain Points:

Universal:

- Losing next steps and follow ups

SMB:

- Team Members not knowing what do to
- Managers not knowing what had been done and is still left to do
- Clients going back on their word / denying agreements or specifics

Sales:

- Losing customer data during handoff between sales team members
- Misquoting a price in a proposal after discussing it on the call

Finance:

- Very worried about audits
- Dropping the ball on a trade or allocation, and losing a client
- Forgetting an important date or event that is meaningful to the client relationship

Insurance:

- E&O lawsuit concerns
- Having incorrect information in a policy document, and being liable
- Submitting the wrong information during a claim, and being liable
- Not having enough information to submit an application, and having to reach back out to the customer and potentially losing the policy to another agent

DELIVERABLE

Design Road Map

The design roadmap I conceived had 2 parallel tracks. One based on iterative improvements on the existing design, and another which would help shape the product future with the ML team through innovation.

DESIGN ROADMAP

Iterative Design Roadmap:

Design System: My task was to design and implement a new design system on sketch and document using invision DSM (design system manager).

Go to Market:

- New Navigation
- New UI
- Self-provisioned onboarding (no sales involvement)
- Passive dail-in (no dailer needed)
- Fullstory.com user session replays

Search: this was our first iteration, it wasn't defined specifically on the initial roadmap, only specified as V2.

Tasks: this was our second iteration, it wasn't defined specifically on the initial roadmap, only specified as V3.

Innovative Design Roadmap:

Recruit Development Customers: 12 customers evenly distributed across our persona groups.

Hire Annotation Team: not-so-artificial intelligence.

Testing:

- Email interface
- Annotation backend interface
- 2 Week testing sprints
- Rapid iteration
- Deliver user requirements

Summary: V4 the make or break feature.

Automation: an evolution of summary, it wasn't defined specifically on the initial roadmap, only specified as V5.

MAKE IT POP

Redesign

While developing our AI tech would take about 18 months there was plenty of non-AI design improvements to be made throughout the product.

REDESIGN

Problems:

More data: One problem identified in the Technology Research was the need for more data collection. Knowing that the quantity of data collected could be the deciding factor for a successful summarization model, I wanted to come up with a way to create a 1:many relationship between users and meetings. Additionally we needed to streamline the onboarding and sales cycle from weeks to minutes and amplify the potential virality of the app.

Design Architecture: The current design architecture was inflexible and sub-optimal for an iterative product process via React. React is component based, and to reduce development times, simplify handoff and increase velocity of innovation we needed to have a design system that would mirror the underlying architecture of React.JS

User Data: We also needed a way to collect both quantitative and qualitative data to iterate on the designs. User interviews are invaluable, but users often lie about things because they don't remember or because they don't want to be seen as ‘mean’.

T0 Problem: this app was useless until there was at least 1 transcript and preferably more than one.

Goals:

- Redesign the app and UX architecture
- Increase user acquisition per day by a factor of x10
- Solve the t0
- Increase number of meetings recorded overall
- Collect better user data

Scope

- Create a scalable and flexible design system
- Enhance current feature set & data collection

Target Audience:

B2B Customers

Technology Used:

Invision DSM, Storybook.JS, Sketch, Invision, React.JS, Promo.com, Fullstory.com

Deliverables

Design System

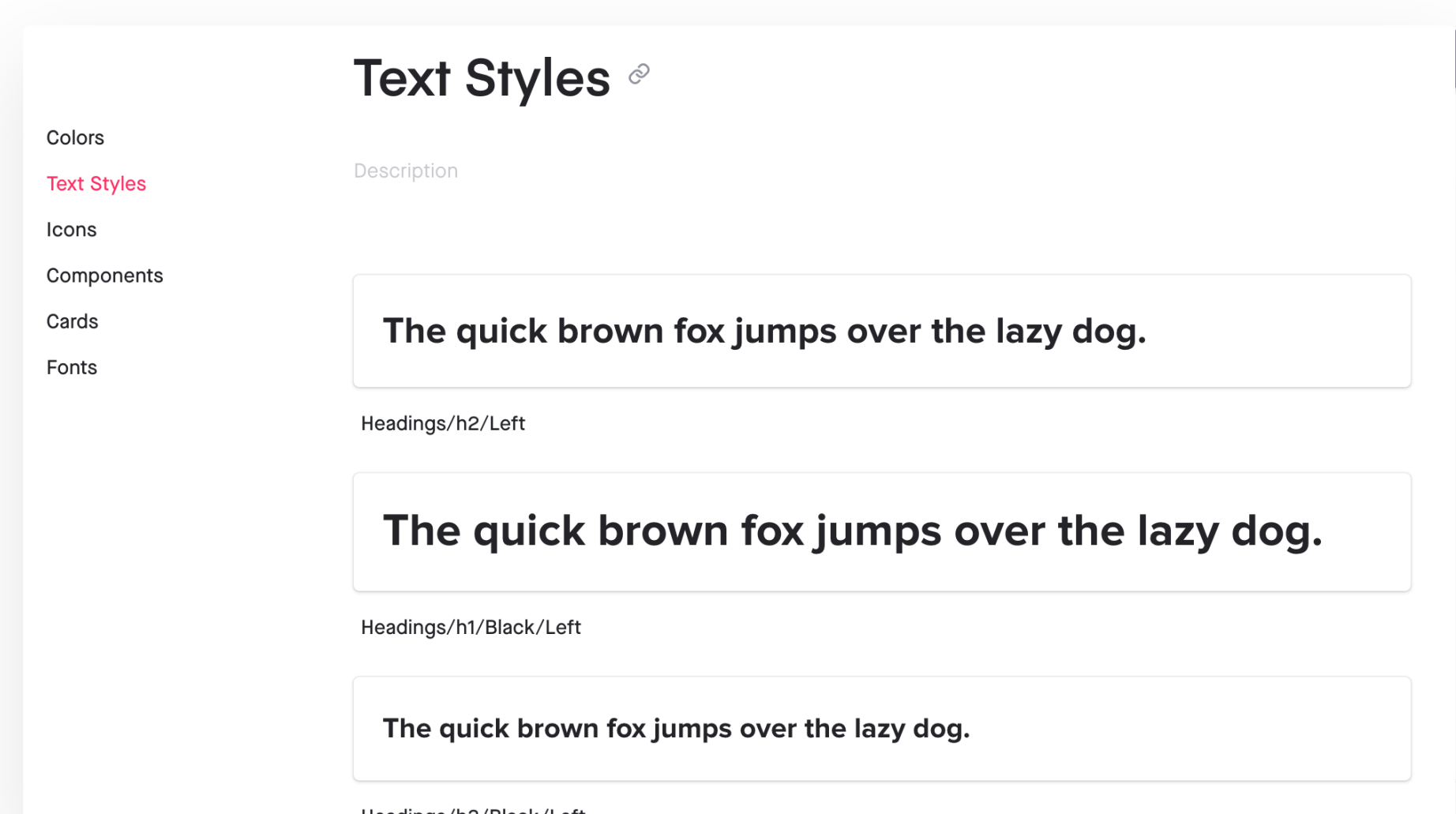
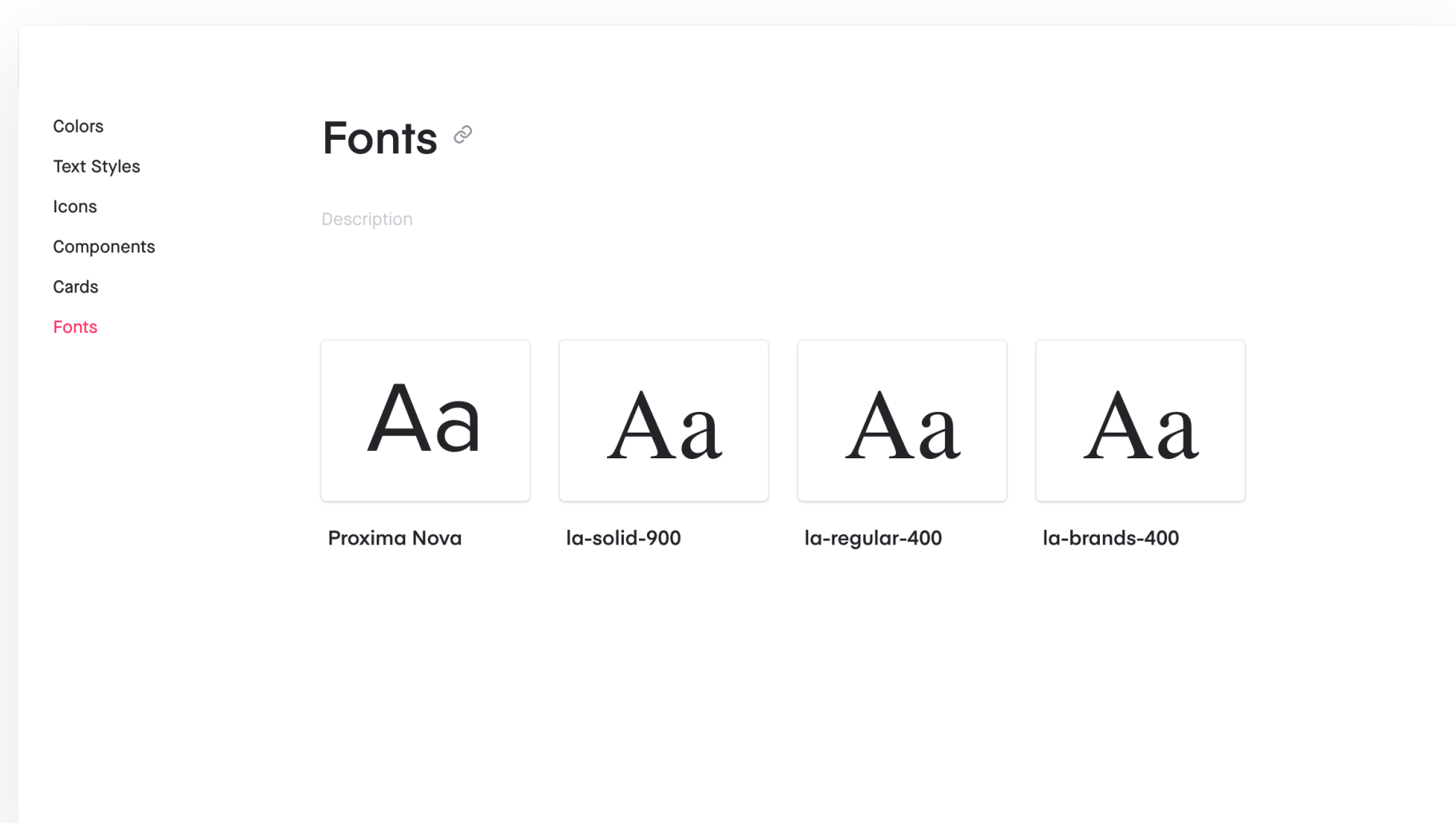
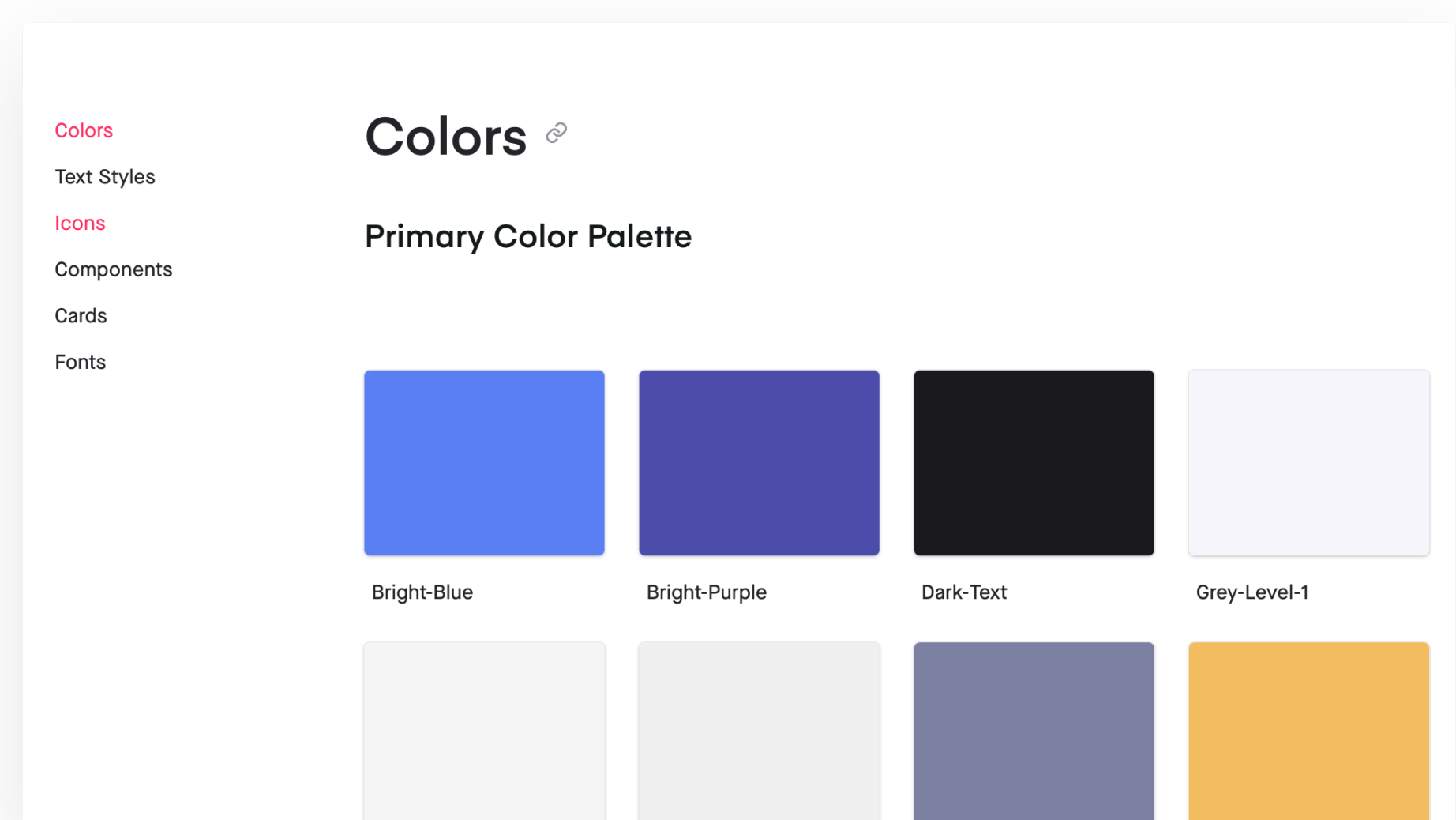
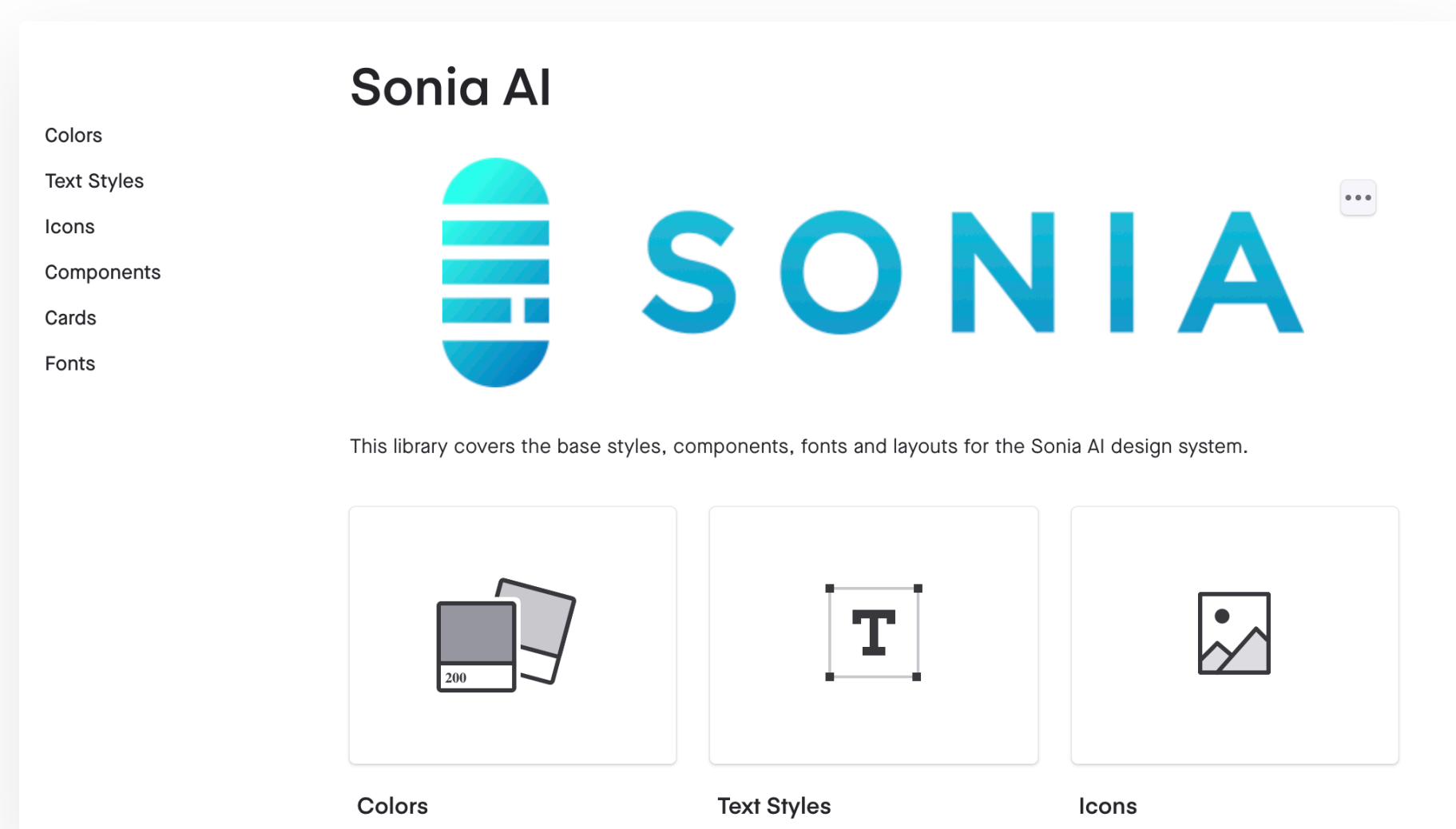
New Design Architecture

INVISION DSM

Design System

Design systems and React go together like bread and butter. The rise of React.JS over the last half decade as the language of the dynamic webapp has pushed the design field to evolve. It's no longer sufficient to simply use consistency in your styles for clean CSS. The modular component driven structure of React, requires a similar structure in design files and documentation. While this involves some sacrifice (components may not look as good on some pages as they do on others) it is well worth the cost of customization to gain the benefit of speed and consistency in implementation. As much as we would love to nitpick over every angle and detail as designers, our job is to make great products, not win webbie awards. To make great products, you need to be able to drive innovation though rapid iteration. Design Systems are a great foundation towards that goal. Design Systems also facilitate quickly onboarding junior designers, and enabling more UX and product focused designers to create flawless UI's without needing to wireframe and handoff to a UI designer. The addition of Storybook.JS makes DSM even more powerful. With DSM+Storybook.JS each component is presented in a visual editor and then show in a library. Now each component is completely modular, and the engineer can code an element while looking at it the whole time.

SONIA DESIGN SYSTEM



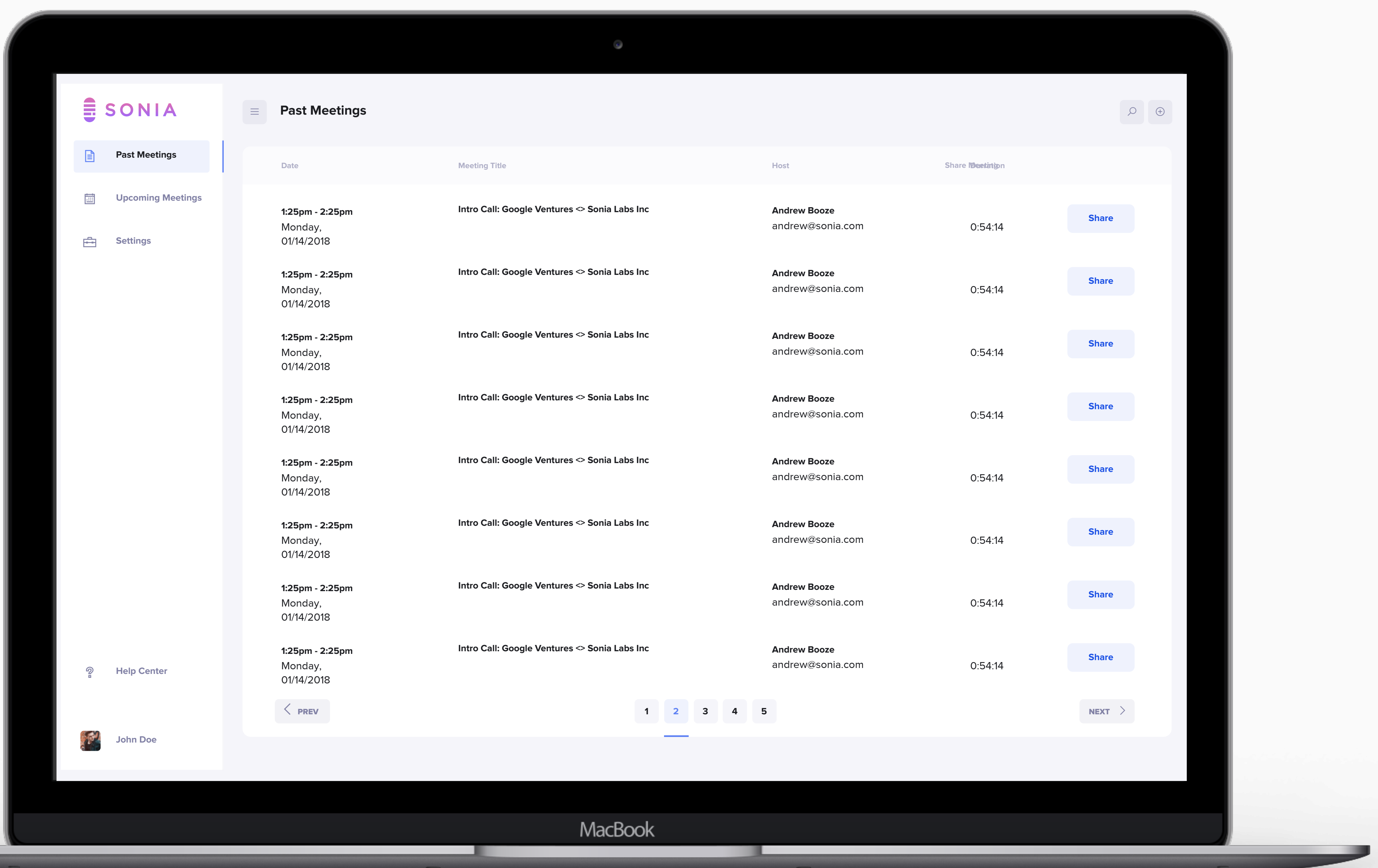
Design Architecture

"One does not simply use nested menus because you ran out of space"
- Me

DESIGN ARCHITECTURE

Navigation:

Visual hierarchy is EVERYTHING in design. There are many ways to establish hierarchies, the gestalt principles of visual perception are a great guide. Violating those principles due to convenience or negligence is simply unacceptable. The horizontal website nav is rarely used in webapps for good reason, and it was obvious we would need a different structure that would be as modular and flexible as our design system and support our iterative product strategy. The choices were a unified dashboard with carrots and modals, or the more traditional web-app side bar nav. We decided to go with the traditional side nav bar more familiar to users:

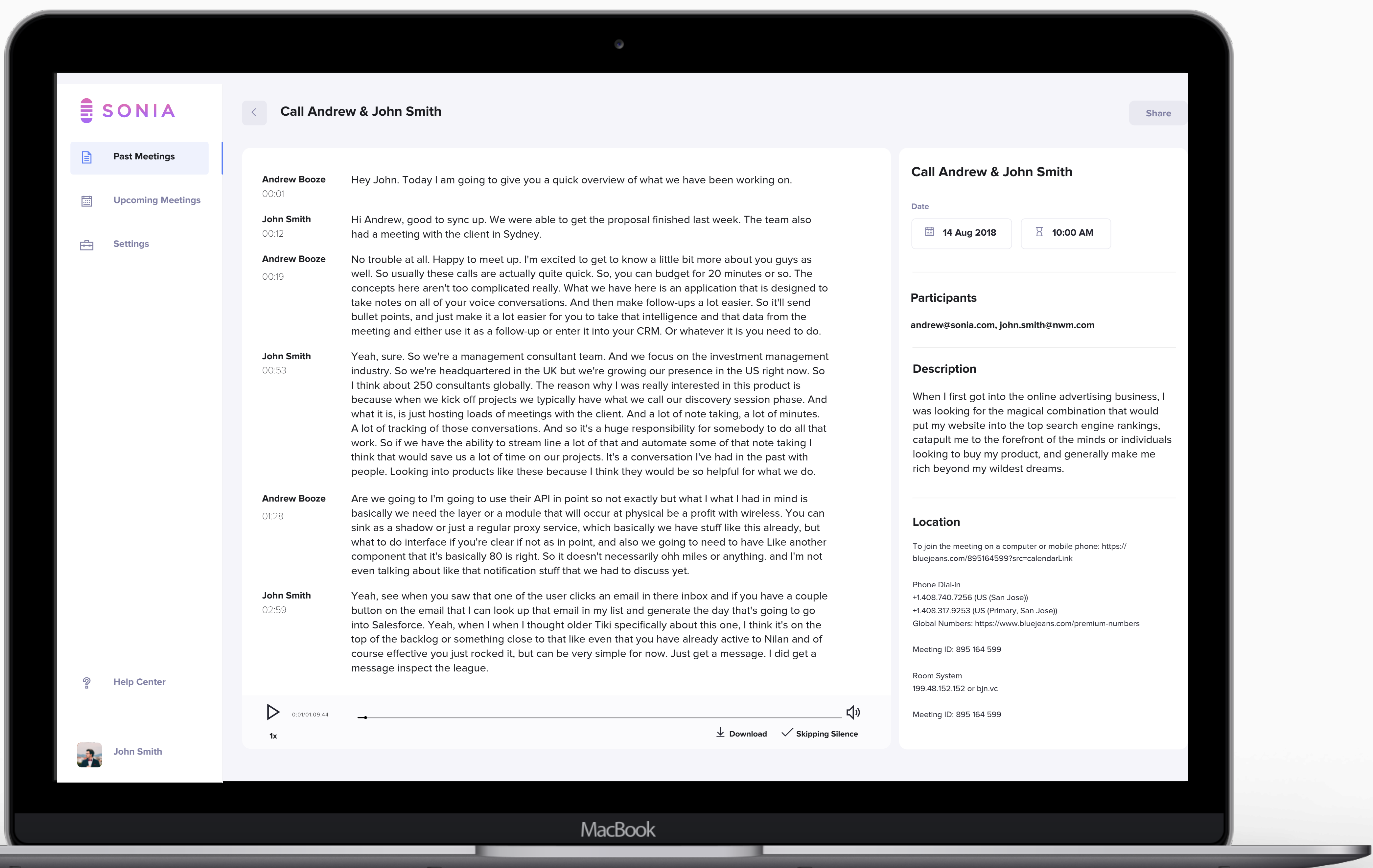


Design Architecture

DESIGN ARCHITECTURE

Meeting View:

2 Panel View: The addition of a second pannel on the meeting view allowed us to now have a flexible area to display companion info to the side of the meeting transcript. This opened up many options down the line, proving to be a powerful design choice. In the first iteration, “call details” were displayed, which provided a lot of value to users in a very tehcnially inexpensive way. Now users didn’t need to remember who was on the call or what the agenda of the meeting was, all that information was already within their grasp.



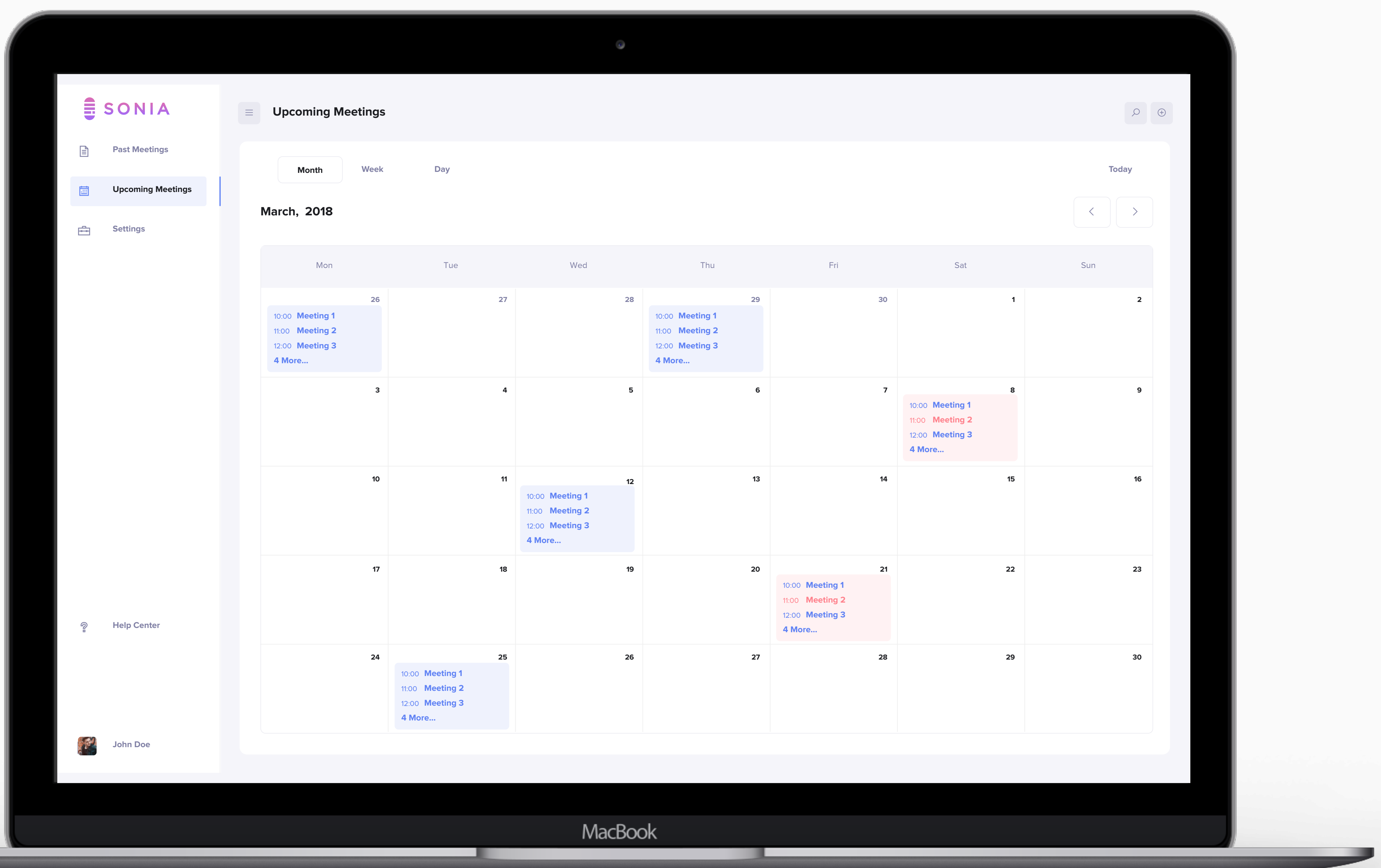
Design Architecture

DESIGN ARCHITECTURE

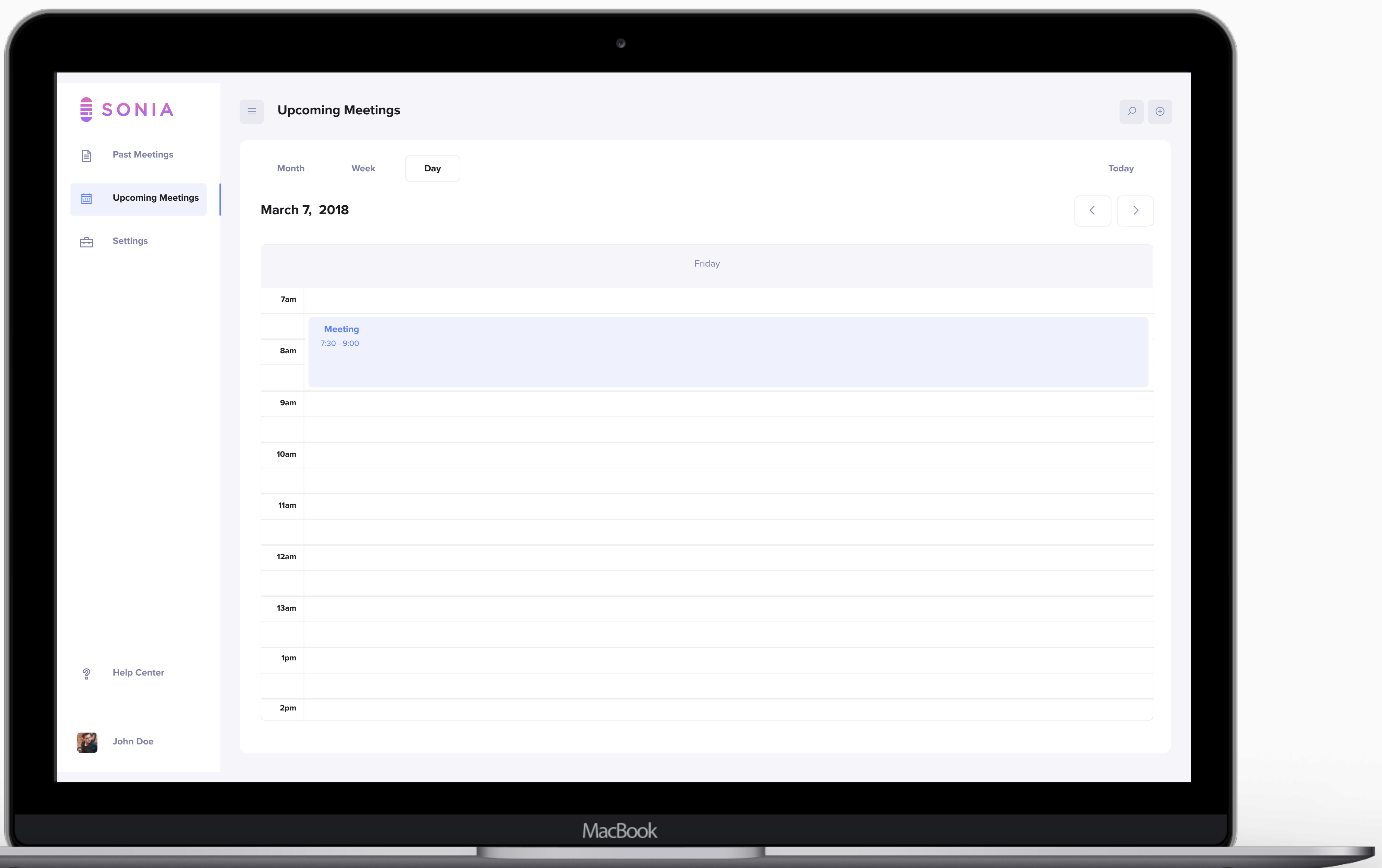
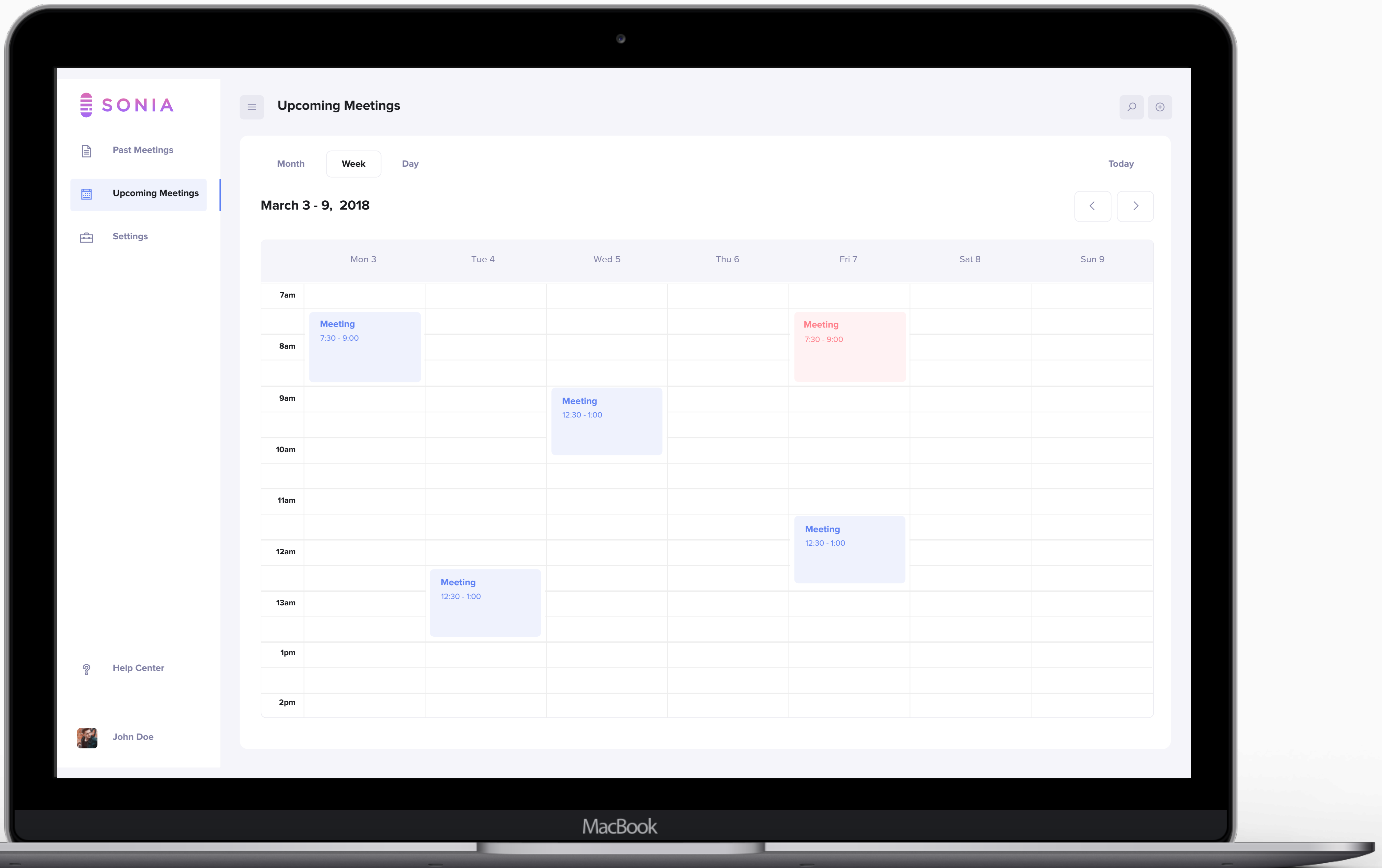
Upcoming Meetings:

Upcoming Meetings: Upcoming meetings was an incredibly important screen because any event with missing or unparseable dial-in info would not be transcribed by Sonia. This would detract seriously from the FTUX, potentially creating a significant source of user attrition. Additionally, our ML strategy relies on collecting as many hours of meetings as possible, and losing meetings due to incorrect dial-in info would directly impede that goal.

Calendar: unlike a list view, which allows for about 3-5 days of meetings to be viewed above the fold, the calendar allows for a full month of meeting to be viewed. Additionally, mirroring a calendar allows for users to navigate seamlessly in a structure they are already familiar with on a daily basis.



Upcoming Meetings: Week and Day Views



GO TO MARKET

Launch

We launched the re-design in Q3 2018, and the results were overwhelmingly positive.

LAUNCH

Go to Market:

We launched the new UI/UX in Q3 2018. I persuaded the C-Level, with the help of engineering, to offer unlimited use of transcription (which was pricy at a cost of 3 cents a minute to us) and divert 50% of our direct sales budget to online ads. We streamlined onboarding, focusing on G-Suite users, and removed the option to sign up with email. This created a 1 click account creation, and significantly reduced complexity and error of incorrect submissions and OAuth permissions failures on MS Exchange. The major change was focusing on passive dialing, everyone on the team was a bit hesitant to dial into every meeting on user's calendars by default, but I believed that the risk was worth the reward. Despite the potential for an embarrassing moment (and there certainly were a few angry emails) I knew that changing user behavior is much harder than dealing with a few angry users. The FTUX and user retention was entirely dependent on delivering that 1st call transcript, before that our app was stuck in an eternal TO with no content and nothing to do.

Testing:

To collect both quantitative and qualitative data I turned to the session recording software FullStory. Though not cheap, FullStory enabled us to view every user session, and filter sessions by flags set in page elements. This would allow us to really get in the head of our users, and add real depth to the session data and funnel analysis available on Mixpanel.

Results:

We had over 100 signups in the first month, and began to process hundres of hours of meetings per week. The simplified onboarding and aggressive ad-campaigns lead to a much lower CPA (from about \$400/reg to around \$30/reg). The inside sales team was able to shift their focus to larger accounts, and expansion within existing accounts.

Most Popular Feature:

Auto dial-in: to everyone's surprise, even my own, the number one most praised feature of the launch was:

"Sonia is always on my calls when I forget, and the meeting record is always in my account" Learned:

Sometimes it's worth the risk: we found out that potentially angering a few users, ended up pleasing 100's more. Sometimes bold moves pay off big.

USER RESEARCH

Innovative Testing

We had a good ML team, they knew how to build models, but not to define user requirements. We need to figure out what those user requirements were so they could train an AI model to fulfill them.

TESTING

Problems:

Needed to come up with a whole new method of user testing and iteration that would align with the development timelines of the ML team. It would take them about 12 months to train a model, and while some of that training could be general summarization in the first 6 months, the last 6 months would need to be focused on a specific structure for the meetings.

Goals:

Prototype, test and validate product solutions based on technology that doesn't yet exist.

Scope:

AI solution, which would be launched in Q2 2019 as the premium version of the Sonia product.

Target Audience:

Users willing to pay for premium AI summarization of their meetings.

Technology Used:

Human Annotation, Email, Zoom.us, Heroku

Deliverables:

A consistent, repeatable format for summarizing recorded meetings.

USER RESEARCH

Testing Process

This is the first time in my career that I needed to test a product that couldn't be mocked up, or prototyped. The models take months to label the data and months to train... so there was no way to utilize the technology to run proper testing iterations. It was quite a conundrum.

TESTING

Experiment Structure:

My first approach to this was to just start reading through the meetings of my sales guy and try to figure out some programatic way to organize and summarize the information. I spent a full week doing nothing but summarizing his meetings. Through this long, slow, painful process, my mind became very very frustrated. In that frustration, I started to develop methods to break down the patterns in the meetings. I was able to start processing them more quickly, and my sales guy got some really good feedback, as we would send out the summary to prospective customers after the meeting.

Once I had this method in place, I talked to the CTO about creating a rough prototype that we could test, maybe build on some of the existing NLP models. Unfortunately, after some research it became obvious this would not be feasible.

So I talked to the CEO and requested a team of people to assist in summarizing meetings. We would start with 2 and expand as needed. I started to document my process and interview prospective hires. A contact at Facebook was able to connect me with several members of their data labeling team whose contracts had just ended, and we were able to onboard some exceptional talent.

As we onboarded the team, I collected a list of prospects who had voiced the most interest the summarization product. We reached out to them, offering them exclusive early access in exchange for their feedback along the way.

We selected 12, evenly split between our personas:

SMB Persona:

Part of a team of 4-10 people, meeting structure consists of internal stand ups and occasional external meetings with vendors or clients

Finance Persona:

Meetings are usually 1:1 with existing clients and prospects

Sales persona:

Meetings are usually 1:1, and information needs to be handed off to other members of the sales org as the account progresses through the funnel

Insurance Persona:

Meetings are usually 1:1 with existing clients and prospects

USER RESEARCH

2 Week Testing Sprints

My personal method of user testing is always in 2 week sprints, with entry and exit interview: both are scheduled upfront, before the user is entered in to the test cohort. Nothing is worse than spending weeks of work on someone who isn't engaged and ends up not giving you feedback.

TESTING

Testing:

For this format, the technical requirements are flexibility and speed over polish. So I stripped the interface down to its absolute core, and used plain text emails. Nothing more basic than that.

For the annotation team, we allocated 1 sprint of 1 engineer to build a backend dashboard with Heroku that would give them a list of links to the meetings that were ready to be processed.

We ran this process for 6 months, 12 2-week sprints. Over that time, we rotated some of the testing members as their schedules changed, or we found that their needs exceeded our capabilities.

Results:

At the end of the 6 months we learned a great many things about meetings and what different personas consider valuable information. As anticipated, persona and role were highly influential in deciding what type of summary was important. It would be impossible to anticipate what type of summary to deliver, without first knowing the recipient's industry and role.

When we presented our findings to the C-Level, there was a decision to be made. The ML team could only focus its resources on 1 model. Thousands of hours of recordings would have to be labeled and fed to the model for training, and each model would have to be trained on a single type of summary. 4 personas would require 4 models. After lengthy discussion, the decision was made to go with the most general purpose summary, the business persona. This persona constituted approximately 40% of the user base, and was also the cheapest persona to acquire. CPA for a business user was around \$10, while Finance was over \$200. Additionally, since they constituted 40% of our user base, they also represented the majority of our meetings available to the ML team.

Iterative Design

After the successful launch of the product we had a lot of user data to sift through, hundreds of users and thousands of sessions. As I predicted, the ratio of meetings record to users sessions was relatively low. 1 session for every 10 meetings would be considered a "power user", but 1:20 was average. All this data presented new challenges and opportunities: users were revealing pain points within our product and existing workflows, and it was our job to use that information to deliver our next feature.

V2

Problems:

Digging through the transcript of an hour long call can take as long or longer than the call itself. How can we enable our users to extract key data in a better way while our AI models are still in training?

Goal:

Reduce time spent on transcript page by 20%, receive positive feedback from "power users".

Scope:

Individual Meeting Page

Target Audience:

All users

Technology Used:

FullStory, Mixpanel, Zoom.US, Calendly, Notion, Sketch, Invision, React.JS, Storybook.JS

Deliverables:

One V2 feature with full UX/UI specification for launch within 4 months.

Iterative Design

V2

Competitive Analysis:

Existing solutions in the AI voice space relied heavily on AI data, so we looked outside the direct competition to some of our favorite products:

Convenient and fast: Slack, Notion

Powerful: Fullstory, Mixpanel

User Interviews:

We identified our power users as the top 50 users in the app by number of logins per week and total meetings recorded per week. We reached out to them to see if they were interested in testing new features in exchange for early access and preferential pricing post launch. We selected 12 users for this test, and would conduct 2 week testing sprints, with entry and exit interviews bookending each sprint.

User Research:

User interviews every 2 weeks, data analysis on Mixpanel, and hours & hours of session replays on Fullstory.

Pain Points:

It takes too long to “process a meeting”, for a 90 minute meeting it can take an hour.

The time it takes for someone who wasn't in the meeting to process the meeting is even longer, ~2hours.

JTBD

A major component of this feature, and many features is understanding the overall business processes that they fit into. A meeting is an extreme case, where there is always a litany of tasks before a meeting in preparation and another group of specific tasks triggered from that meeting.

V2

Persona: Job Story

Meeting attendee: Needs to find specific pieces of information to take specific actions for themselves or to assign to a teammate.

Meeting processor: May need to create a complete summary, or do a list of tasks based on the items discussed in the call.

SMB Persona: Needs to create updates in some sort of project management tool, also needs to create followup emails and new tasks.

Sales persona: Needs to reference specific quote details from the call, specific customer info, needs to be able to pass the account off from SDR to AE to AM, need to update the CRM.

Finance Persona: Needs to find specific details about an investment to confirm the correct trade or allocation is made

Insurance Persona: Needs to find specific details about a policy or claim to submit to an insurance carrier

Test Method:

Collect data through full story, interview power users, decide on 2 concepts to implement in for small scale testing with power users.

Evidence:

Qualitative: entry and exit interviews with 12 power user cohort every 2 weeks.

Quantitative: Watch user sessions in Fullstory, data analysis in Mixpanel.

Customer Journey Mapping

The great thing about design iteration is the foundation of user data you have to work with. To make our first feature iteration, we started by mapping our customer's journeys from pre-call, to in-call, to post call processing, handoff, record keeping & follow up tasks. These journeys shared many similarities and had some differences. Many of the differences had to do with the size of the team, and the nature of the "post call process". A post call sales process is much different than that of a SMB internal team. These journey maps are a great way to start discussing possible solutions that address the needs and pain-points of multiple user segments.

V2

User Testing

12 power user, 2 week testing sprints with entry and exit interviews. The 12 users were evenly split between primary users (users whose meetings are recorded by Sonia) and secondary users, who do not have meetings recorded, but can access meetings for processing purposes. The groups were split into 2 cohorts:

Group A: 3 primary and 3 secondary users given access to solution 1 the first week and solution 2 the second week.

Group B: 3 primary and 3 secondary users given access to solution 2 the first week and solution 1 the second week.

Solutions:

The two solutions we tested were adding notes to the meeting transcript, and “super-search”:

Meeting Notes: Targeted at sales, finance and larger SMB and insurance teams who had non-meeting participants who would process the meeting. Notes enabled one person to “mark up” some key points in the meeting and hand it off to another team member for processing. With sales, it allowed AEs and AMs to better understand the sales process as a prospect moved through the sales funnel.

Super-Search: Super search enhanced existing within-transcript search to include multiple search terms simultaneously, and displayed the context around those search terms in the side bar to allow for easier navigation through the transcript. Search items were also displayed as colored dots on the player.

V2

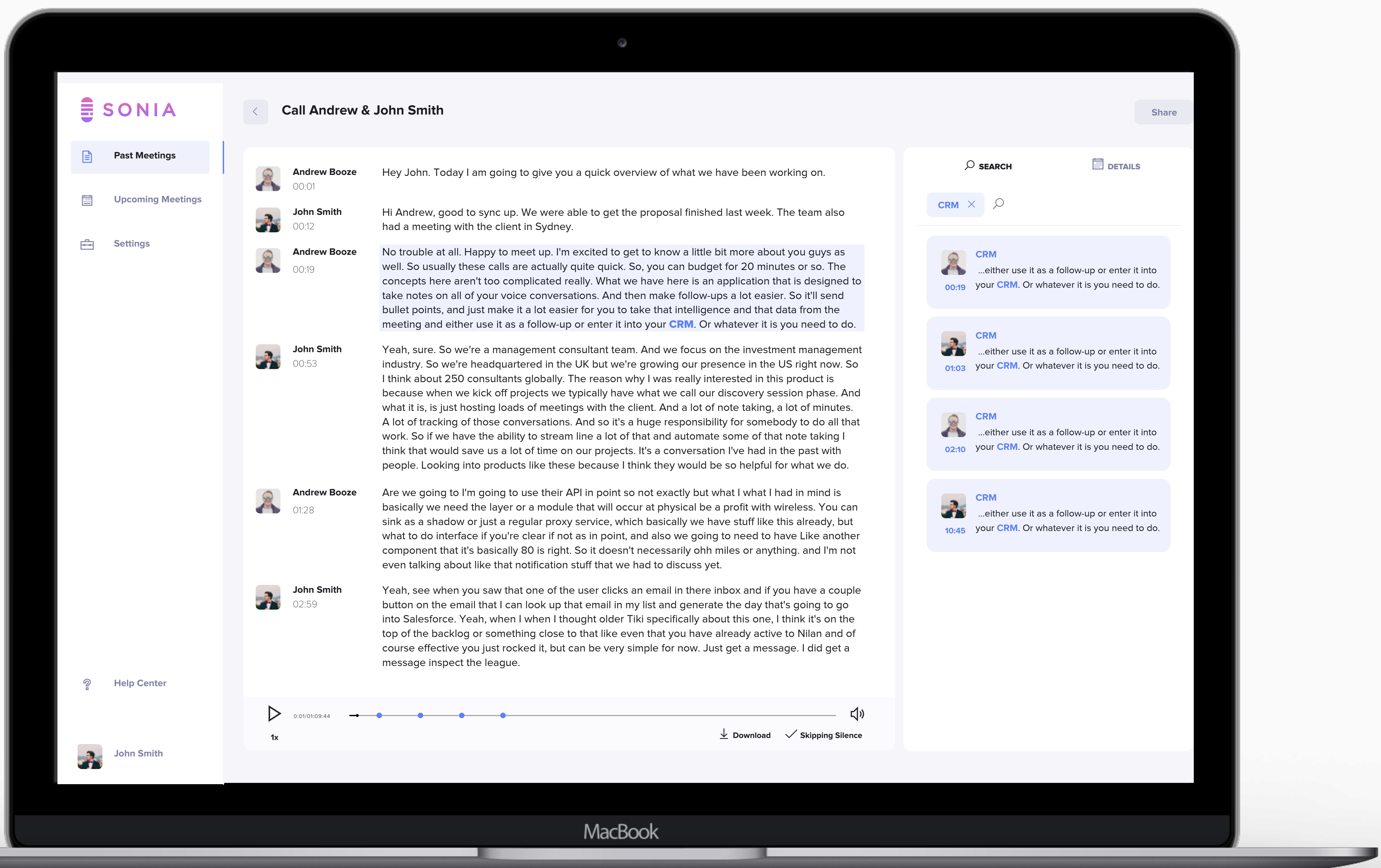
Feature Launch

V2 RESULTS

Results:

Outcomes: The results of split testing meeting notes vs super-search resulting in a 10% adoption of meeting notes, and 50% adoption of super-search. That represented a 30% increase over regular search. Qualitative exit interviews showed that both groups A & B, if they had to choose one option to not use, would choose to abandon meeting notes.

Lessons learned: The user base was still mostly composed of individual users and small teams, so features focused at them, rather than larger teams were more popular. Sales and C-Level wanted to push up market as soon as possible, but cementing our current user base (and converting them to paid) had to remain the top priority.



Third Iteration

We were excited to take some of the learnings from V2 and to expand on them. We wanted to provide more enhancements to the product while we waited for the summarization model launch, and we dove into a third iteration on the heels of super-search.

V3

Problems:

One of the main jobs that power users reported doing with Sonia transcripts was to pull out tasks for themselves and others.

Goal:

Streamline task creation and assignment process within Sonia meetings. Enabling users to more effectively create, assign and manage task from meetings within Sonia.

Scope:

Individual Meeting Page

Target Audience:

Non-sales roles (~70% of users)

Technology Used:

FullStory, Mixpanel, Zoom.US, Calendly, Notion, Sketch, Invision, React.JS, Storybook.JS

Deliverables:

V3 feature with full UX/UI specification to collect tasks and assign them to team members, link them to points in the conversation for reference

User Interviews

We developed the tasks feature with a subset of the same group of power users as we developed the search feature. This group was focused on non-sales roles (sales usually didn't create tasks from meetings other than follow up emails and CRM entry) The format remained the same, Zoom interviews every 2 weeks scheduled with Calendly. We uncovered initially that users were not using specific task tracking tools like Asana, the majority were using spreadsheets and email to assign and manage tasks, having found onboarding new task tools too much of an investment for the team

V3

JTBD

Needs to create tasks for themselves and their team in their tasks tracking software, spreadsheet or email. This story was relatively straight forward, and didn't change across personas.

Job Story

Needs to create and update tasks in a spreadsheet that includes the task name, context, and who it is assigned to.

Test Method:

Quickly launch an mvp of the tasks feature to power users within a month.

Evidence:

Qualitative: Entry and exit interviews with 12 power user cohort, watching user sessions in Fullstory.

Quantitative: Data analysis through number of tasks made per meeting, % of meetings with tasks, and change in those figures over time.

User Testing:

Testing would involve rolling out tasks to our group of power users and monitoring their adoption over 2 2-Week testing cycles. In that time we would have 3 interviews with each user, and attempt to integrate changes to the feature to be debuted in the second cycle.

V3

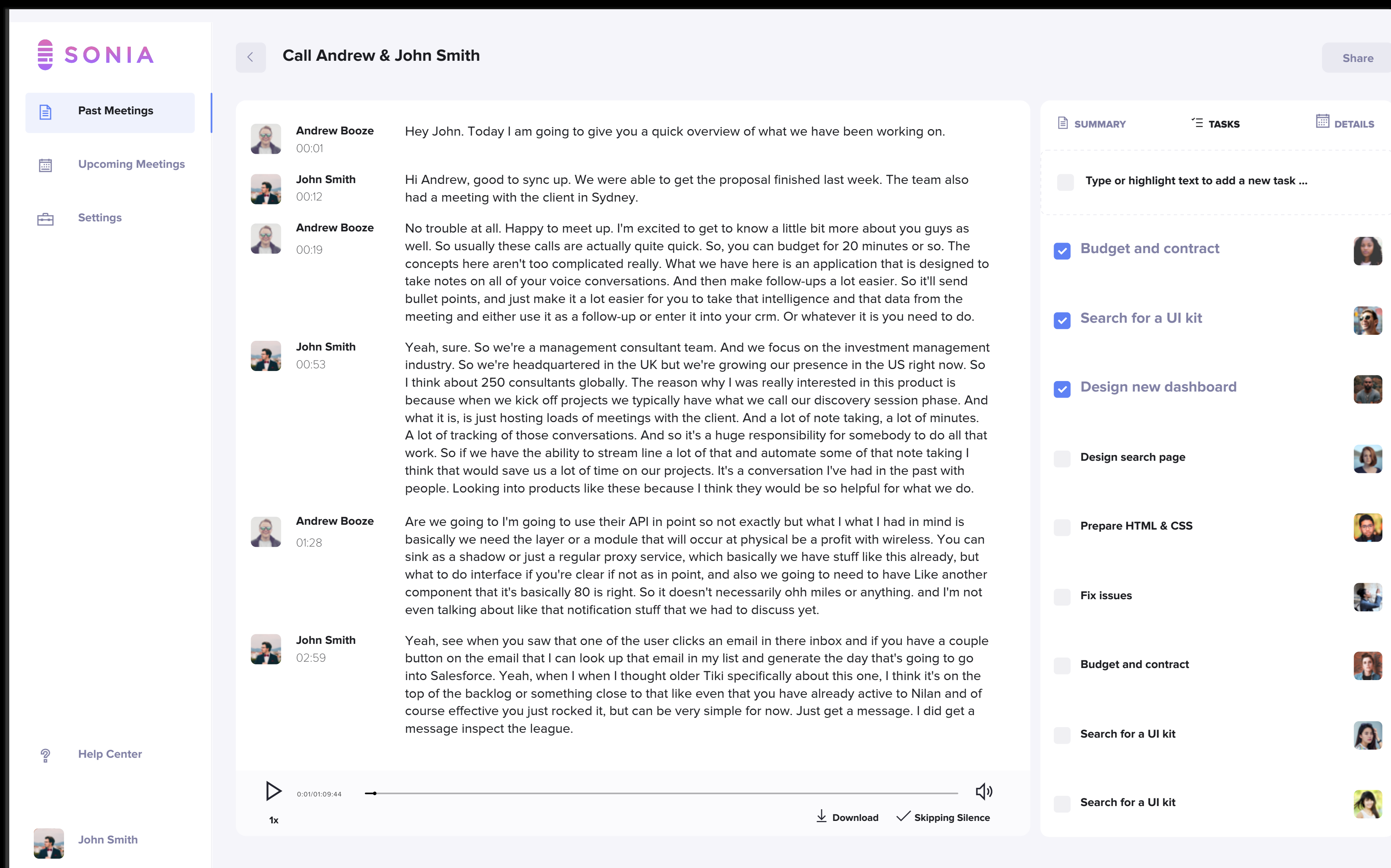
Prototype

V3 RESULTS

Results:

Outcomes: Tasks saw very little adoption among the testing group: ~10% of meetings involved the creation of a task in the first week and ~6% in the second week. By the end of the first month of testing it was approaching 0%. Exit interviews revealed that even though users were initially excited about the concept, having stated that “task creation and tracking is an issue” in the entry interview, it wasn’t a significant enough pain point to warrant the adoption of a new tool. The feature was never launched to the greater user base. RIP.

Lessons learned: We should have realized that users who would’t adopt Asana, probably wouldn’t adopt this either. The most passive interactions proved to be the most popular, ones that accounted for and accommodated “sub-optimal” (lazy) user behavior rather than highly engaged and focused workflows. Our user base was not looking for a ton of new tools, just to spend less time on meeting notes.



Innovative Design

Designing a seamless UX and UI for delivering summary to existing Sonia users presented some unique challenges. After a year of defining the correct content of a summary, we needed a way to deliver the content to users so that it would enhance their workflow. As we learned with Sonia Tasks (V3), the problem with new features is that many times, adding more things simply creates more complexity that users don't find useful.

V4

Problem:

Find a way to deliver meeting summaries with the greatest possible effectiveness and not distract from the established functionality of the application.

Goal:

Create the killer feature for Sonia that would convert our free users to paid users.

Scope:

Individual Meetings Page / Summary

Target Audience:

SMB Persona (40% of users)

Technology Used:

FullStory, Zoom.US, Calendly, Notion, Sketch, Invision, React.JS, Storybook.JS

Deliverables:

Full UX/UI specification for Summary

Innovative Design

V4

JTBD

Needs to have the important parts of a meeting in “notes” but also wants to pay attention during the meeting. Doesn’t have budget for a fulltime assistant to sit in on meetings.

Personas:

SMB Persona: Part of a team of 4-10 people, meeting structure consists of internal stand ups and occasional external meetings with vendors or clients.

Meeting attendee: Needs to find specific pieces of information to take specific actions

Meeting processor: May need to create a complete summary, or do a list of tasks based on the items discussed in the call

Job Stories:

Check if every topic actually got discussed in the meeting.

Update The Spread Sheet to reflect completed work.

Send an email follow up or next step.

Assign a task to themselves or teammate for later completion.

Test Method:

Split testing, group A would receive the first design for the first week, group B would receive the second. During the second week, group A would receive the second design and group B would receive the first.

Evidence:

Quantitative: average time needed to process a meeting, and extract all necessary info.

Qualitative: Fullstory session replay, entry and exit interviews every 2 weeks.

User Research

We included a subset of the power users whom we already worked with to establish the summary guidelines for the ML team over the past 6 months. Now we recruited a few more to get our testing group to 10. We already knew that they were getting utility out of the summary, but we also needed to understand how this could work within the app. The way they used the summary delivered in the email was interesting. They would use it as a first pass, but if they needed something else they would go into the full transcript. The new power users who had never received summaries were already very adept at using search, and we needed to create a way to seamlessly integrate summary into their existing workflow.

V 4

User Testing

10 power users, 2 week testing sprints with exit and entry interviews. We were able to devote more engineering resources to this test, and so we were able to split test 2 designs against each other. Additionally the backend annotation tool was expanded to be able to directly feed into the backend application, and feed results to the front end the same way that our ML model eventually would. The groups were split into 2 cohorts:

Group A: 5 users given access to solution 1 the first week and solution 2 the second week

Group B: 5 users users given access to solution 2 the first week and solution 1 the second week

Solutions:

Timeline view vs Single Page Summary

A big issue was if the summary could be a stand alone document. The goal of the product was always to summarize meetings, and not need the full transcript at all. Many stake holders felt strongly about this, and felt the summary should completely replaced the transcript at the forefront of the app. On the other hand, we had a loyal user base and were getting success with the product, some of us saw summary more as a way to enhance the current user experience, not replace it.

Single Page Summary

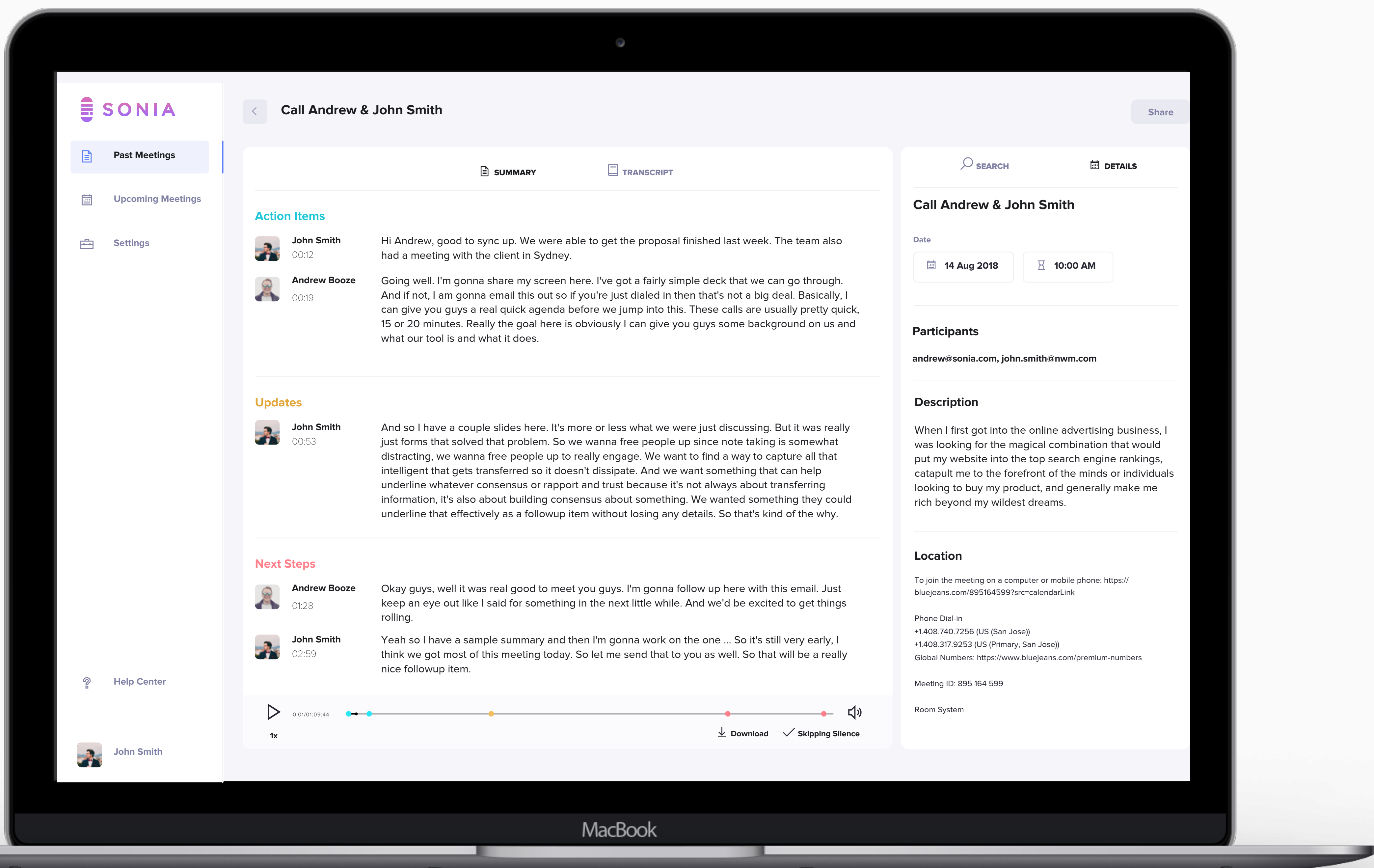
V4 RESULTS

Design:

Single Page Summary: This was the initial vision of the product: a meeting summary. The transcript was always intended as a means to get the summary, and a reference if some specific item needed to be found. But summary was meant to be the bread and butter of the app. It was the core of every social banner, landing page copy and sales pitch,

“Sonia, your meeting assistant with AI generated summaries”

Naturally, the idea of putting summary, the literal identity of the company, front and center was the most popular design choice internally. Additionally, it was the most natural integration of the testing interface (email) into the application. This was by far the favorite choice from C-Level and sales.

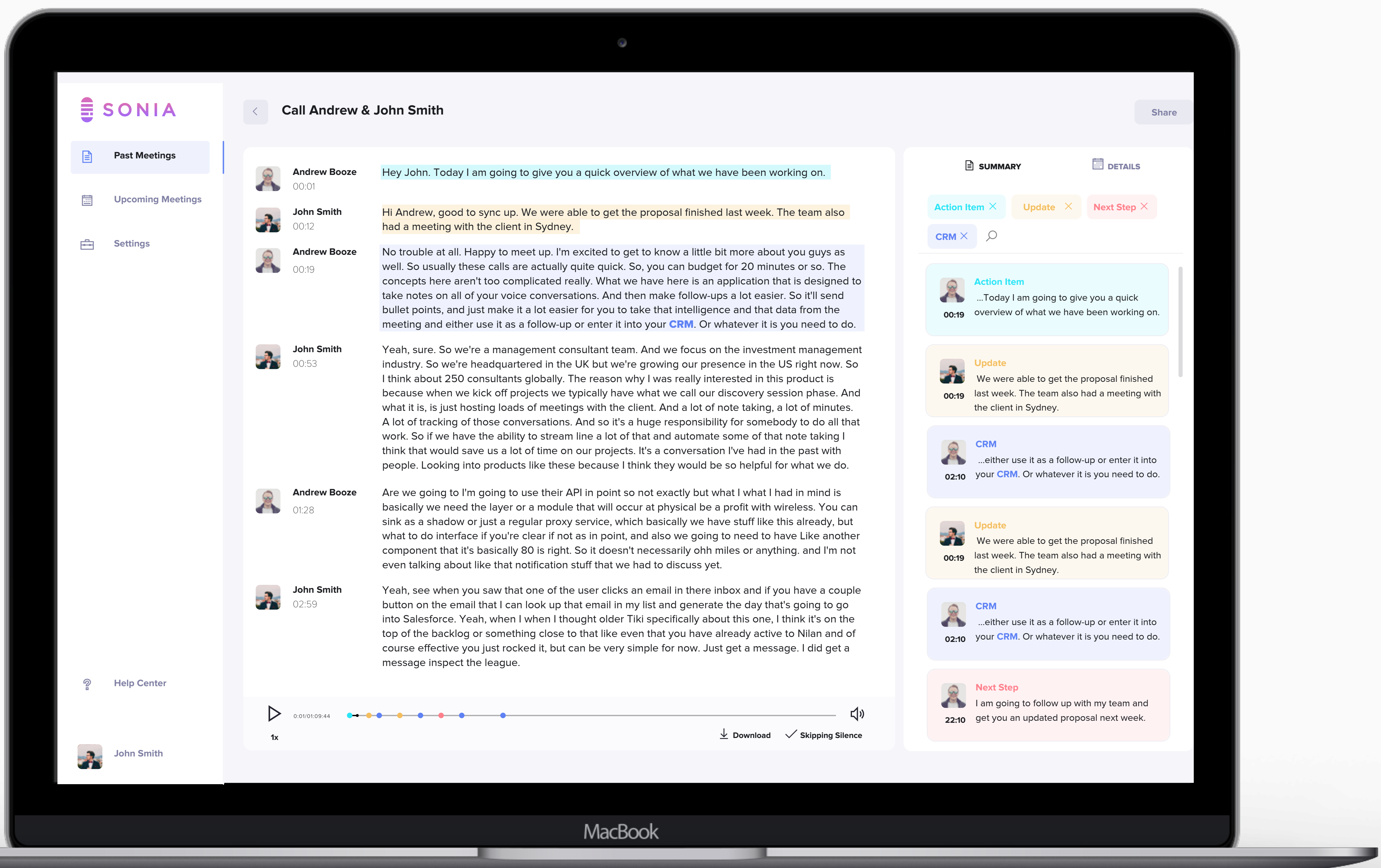


Timeline View

V4 RESULTS

Design:

Timeline View: I have never been afraid of being unpopular (except in highschool). Especially when I split test, I want to choose two designs that are as divergent as possible while still fulfilling the user requirements. We learned a lot of hard lessons from super-search (v2) and tasks (v3), one of those lessons happened to be that the transcript was a very useful tool, and enhancing it, rather than supplementing it, so far had been the winning strategy. I wanted to created an interface that would really embrace everything we had learned over the previous year, and use summary as a way to elevate the feature set that was already loved by our users, not replace it with something new. In this version the summary points are included in the search interface and can even be exited out for a cleaner view. This allows users to seamlessly created their own “map” of the meeting with both search terms and AI summary.



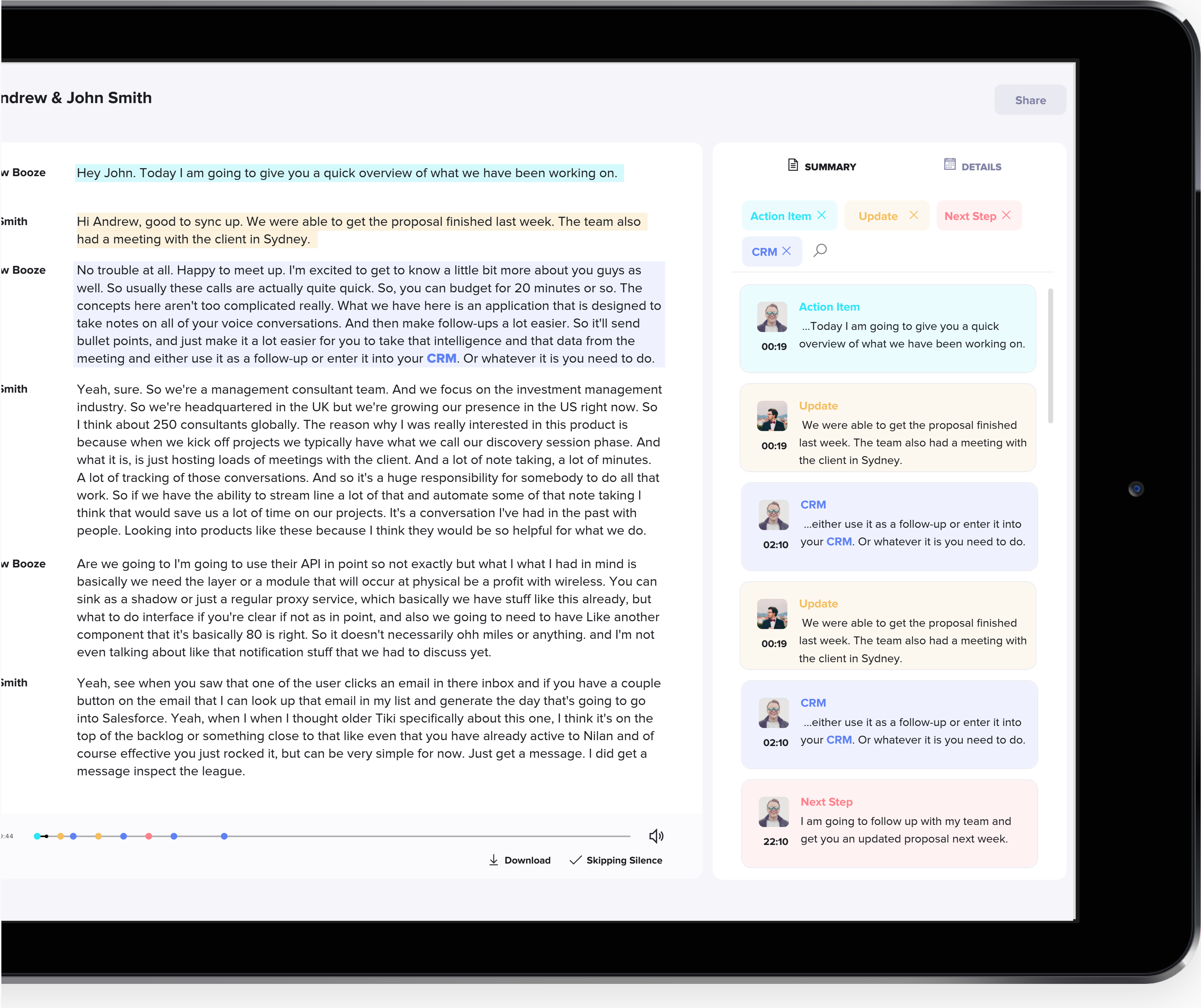
The Winner

V4 RESULTS

Results:

Outcomes: After testing, we found that users preferred the timeline view to the single page summary. Context was so important, and also search and the transcript had become such an integral part of their workflow that it was much better to enhance that page than replace it. We were able to convert all our power users to paying customers, and began upgrading dozens of users a month to premium subscriptions.

Lessons Learned: products evolve and sometimes you need to alienate users to usher in a new era, but this isn’t always the case. The goal is always to provide the maximum utility to the user, and if that means sacrificing some of the initial vision of a feature or product, so be it.



Innovative Design

Workflow Automation: After the failure of tasks, we still wanted to deliver users functionality that would extend further into their workflow. Something that would accelerate the velocity of the jobs that are connected to each meeting.

V5

Problem:

Even though summary improved the functionality of the transcript, and decreased time needed to extract valuable information, the process was still slower and more cumbersome than the real world meeting assistants Sonia aims to supplement.

Goal:

Find a way to extend the transcript and meeting summary deeper into the actual jobs users need to accomplish.

Scope:

Individual Meetings Page / Summary

Target Audience:

SMB + Sales (70% of users)

Technology Used:

FullStory, Zoom.US, Calendly, Notion, Sketch, Invision, React.JS, Storybook.JS

Deliverables:

New workflow automation feature with full UX/UI

Innovative Design

V5

User Interviews:

We had a backlog of users who had requested integrations, we decided to use that backlog as the user testing pool. We sorted users by integration and chose to focus on the email job story.

Personas: Job Story

SMB: Send an email to teammate that was not in the meeting.

SMB: Send an email to a teammate that was in the meeting.

SMB: Send an email to a client that was in the meeting.

SMB: Send an email to a client that was not in the meeting.

Sales: Send an email to a prospect that was in the meeting.

Sales: Send an email to a prospect that was not in the meeting.

Test Method:

2 week sprints, with 6 users, 1 integration (Gmail).

Evidence:

Quantitative: number of emails sent over time.

Qualitative: Fullstory session replay, entry and exit interviews every 2 weeks.

User Testing:

The most requested integration was gmail draft emails, follow-up emails are so important, and covered both our sales and business personas (70%) of the user base

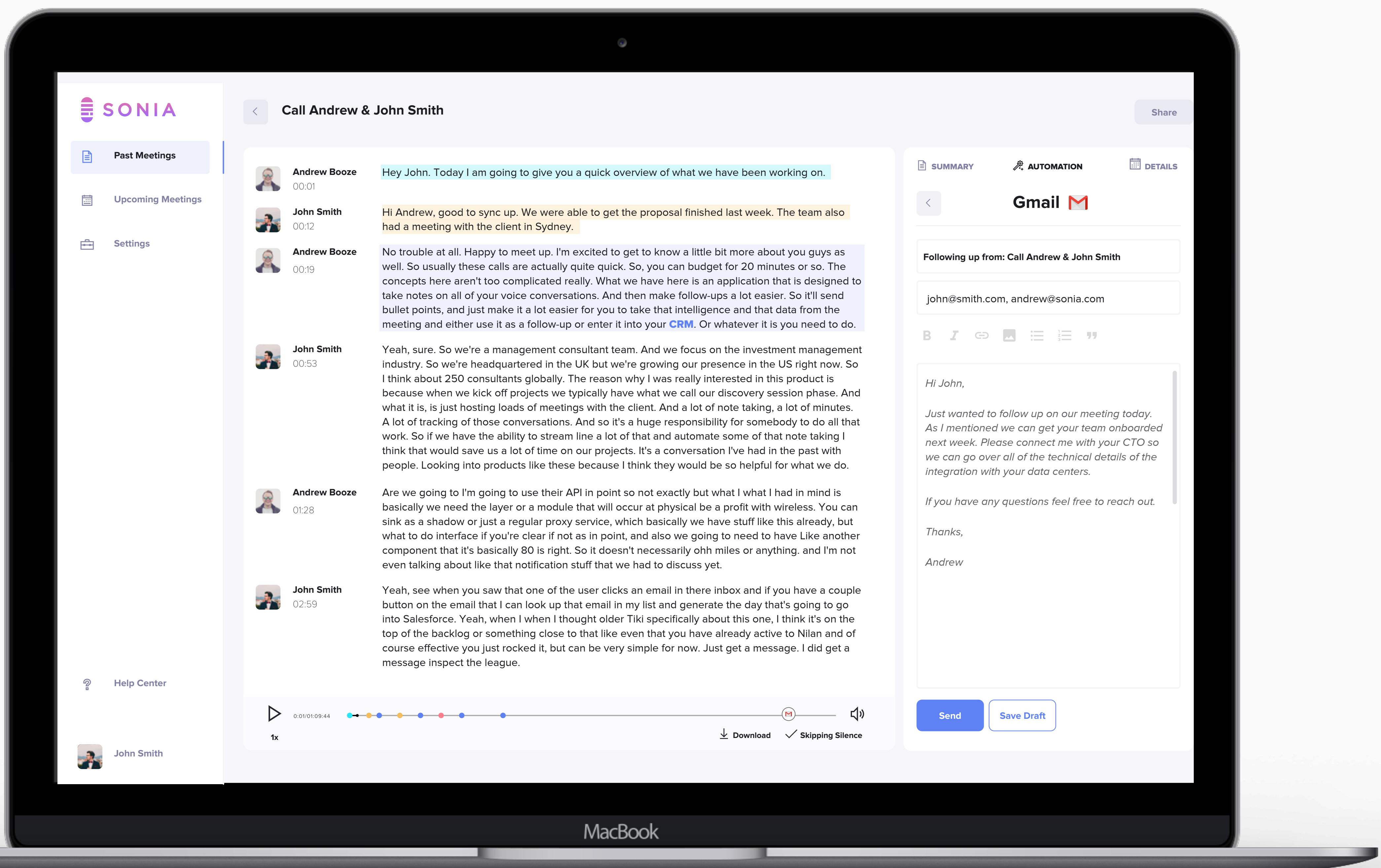
Automation

V4 RESULTS

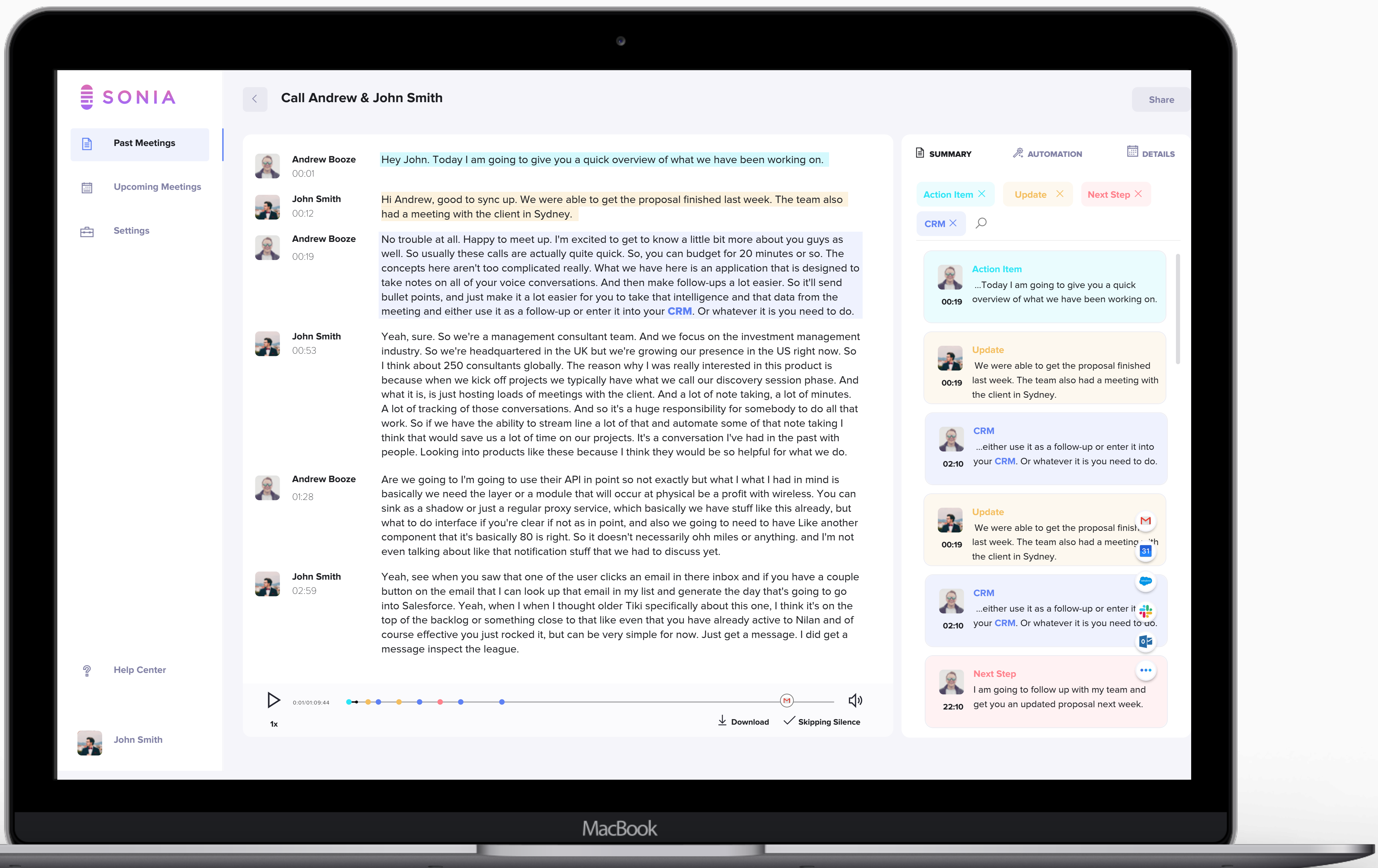
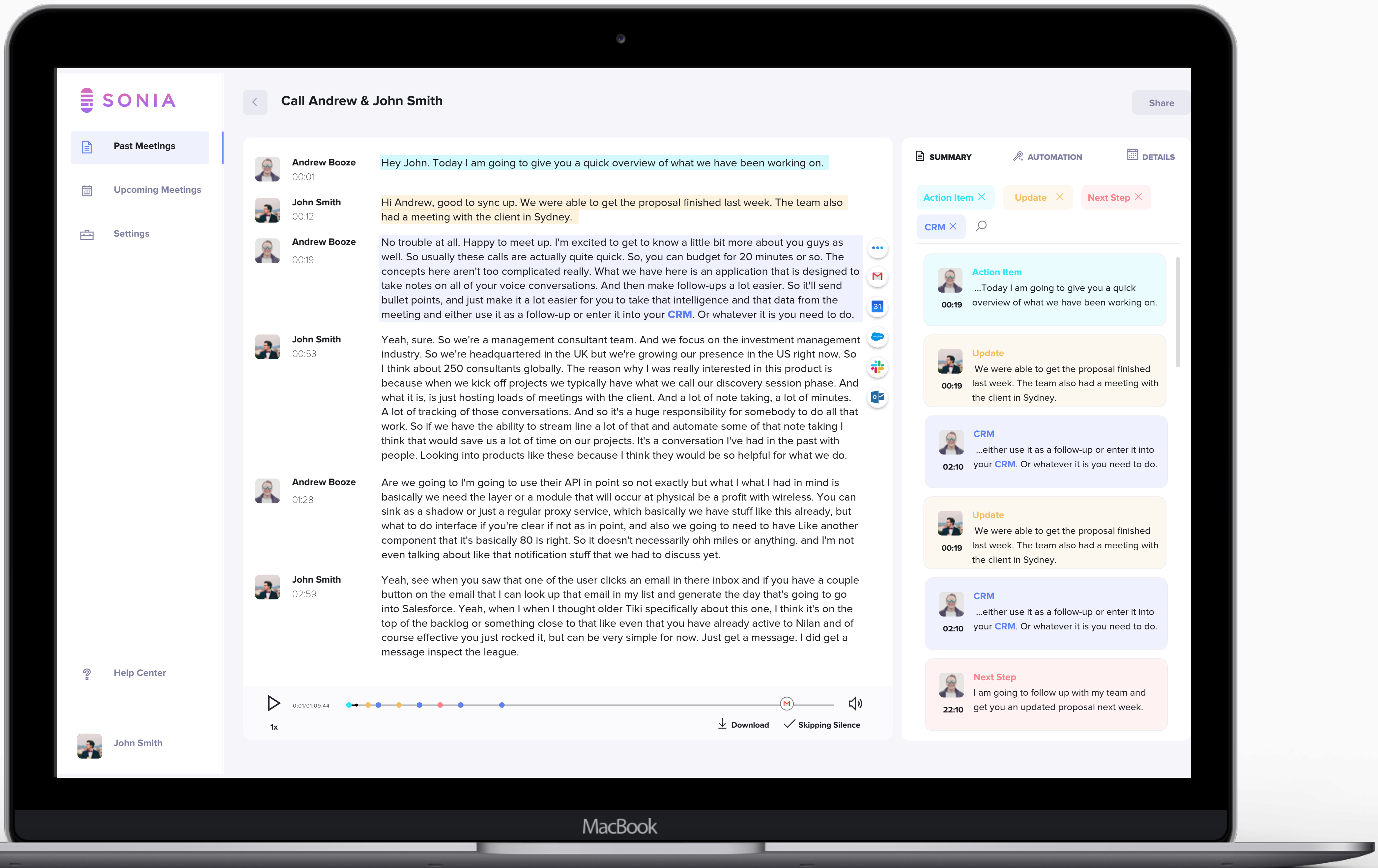
Results:

Outcomes: We began to generate over 100 draft emails a week in the first month. The offer of automation also proved to be a huge marketing and sales advantage and we saw increased of 20% upgrades from unpaid to paid plans.

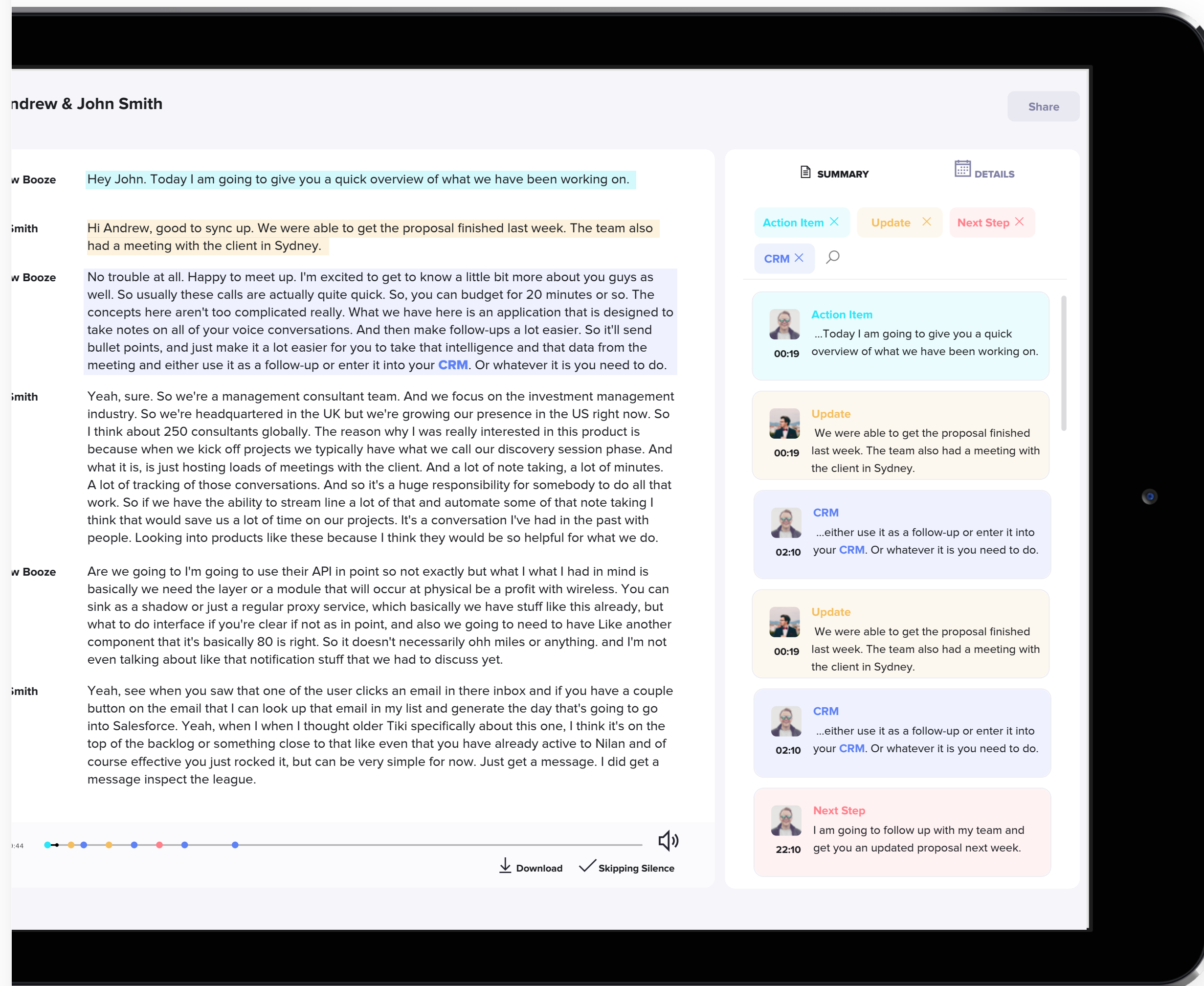
Lessons learned: The failure of tasks was not in vain. We learned that users didn't want more tools, they wanted less work. The pain of that lesson was not easy to forget, but we were able to use that motivation to delivery a new feature with superior user experience and drive new revenue.



Automation: Activation of Automation Workflows from Transcript and Summary



CASY STUDY



Unfortunately Sonia was forced to shut down due to the Covid-19 Crisis. I am forever grateful to my team, they are more like family than co-workers.

Leadership, especially CEO Avish Bhamra, mentored me and allowed me to grow into my role as Head of Product through all the challenges. I am very sad to let them go, but I am always excited to see what new surprises life brings.



Brandon Finn

Head of Product, Sonia.com: 2017-2020

In 2017 I was brought into Sonia as a UX designer to help refine the designs from an external agency that were in the process of being implemented. Over the next 3 years, I grew to lead the product team and successfully launch the product as well as many new and innovative features.