

Webex & Salesforce

Usability testing questions and areas of interest

Release: March 2021

Main Upcoming Meetings

Opportunity Tab

Where would a user go to get upcoming meetings and recordings. Which information would be useful for upcoming meetings? Can a user join a meeting from within Salesforce?

- 1) Where do you expect to see your upcoming meetings?
- 2) What information would you expect to see in upcoming meetings?
- 3) What do you expect to see when you click the join button?
- 4) Do you want to join the meeting remaining within Salesforce or would you be happy to open our Webex app?

As Olivier mentioned customers would like to have embedded experience so let's probe this a bit more so we have a case in support.

- 5) How are you going to access a meeting recording?
- 6) How many and what type of meetings would you have either with customers or with colleagues?
- 7) Thinking about your Salesforce layout where do you expect to see this meetings pod would it be on top or bottom?
- 8) Where would you go to schedule a meeting?

Schedule a meeting

Can a user easily schedule a meeting? What type of meetings would be scheduled?

- 1) Can a user easily add users from existing spaces? Would this be useful?
- 2) Do you need to change the time Zone? Can easily change that from this form?
- 3) Can a user easily schedule and reschedule a conflicting meeting?
- 4) Can a user select start and end date? Do they ever need to schedule a meeting that goes to the next day and how often do they need to schedule them?

Phone call

Can a user easily find the button to make a phone call? Can they make call to someone? What are their expectations?

- 1) Can a user find and place a phone call using our “Make a call” button?
- 3) Would they ever be making a video call to their customer?
- 4) Do they expect to make a video call to their customer?
- 5) Do they understand what’s going on within the calling screen? What are the choices can they easily change a contact type?
- 6) Which button would they click and what is the green or grey video call button going to give them? Did they expect that button there?

Recents widget

Can a user find the recents widget? What do they expect to see in the recents widget?

- 1) Where is the recents widget is it easy to find?
- 2) What information is the recents widget providing?
- 3) What do you expect to see in the recents widget? Spaces, dialer, scheduling a meeting?
- 4) Would you go to a widget to join a meeting or look for an upcoming meeting?
- 5) Would you like to have contacts (phone book) within the widget?

Space widget

Can a user easily chat, share content and have a meeting using the space widget? How important is it to save a conversation from widget to Salesforce?

- 1) Can a user open a space widget from within recents widget?
- 2) Can a user easily post a message using the space widget?
- 3) What would you like to do here; chat, share file, share screen or have a video chat?
- 4) Would the user be interested in sharing file without having a video chat?
- 5) If an existing Webex widget user, what are the pain points?
- 6) Would you keep the space window small or pop out to a bigger window?
- 7) Do you know how to respond to a message or delete a message?
- 8) Would you flag a message and why?
- 9) What else do you expect to see here?
- 10) Can you easily look at shared content?
- 11) Can you add people to a group space?
- 12) Can you initiate a video call?
- 13) Within a video call can you easily move between tabs; Go to content tab and come back to the video?
- 14) Do you need to save this chat to Salesforce? If yes how often and where in salesforce should this appear?

Spaces pod on Salesforce

- 1) Can you easily add or create a space for the opportunity?
- 2) Can a user add people to the space while creating a space?
- 3) How would the user open space widget from within the spaces pod?
- 4) What do you expect to see behind information icon?
- 5) How many spaces would you have for an opportunity and what type of spaces, team or managerial?
- 6) Where do you expect to see this pod in your salesforce layout; top/bottom, column or center and how often would you use this?
- 7) Would you make adhoc team calls using these spaces and did they know they could do that (for existing webex customers)?
- 8) What does the blue dot and bold text mean in the space? Can the user tell its for unread messages.