PX Wireframes

Conjoint Research & Analysis Tool

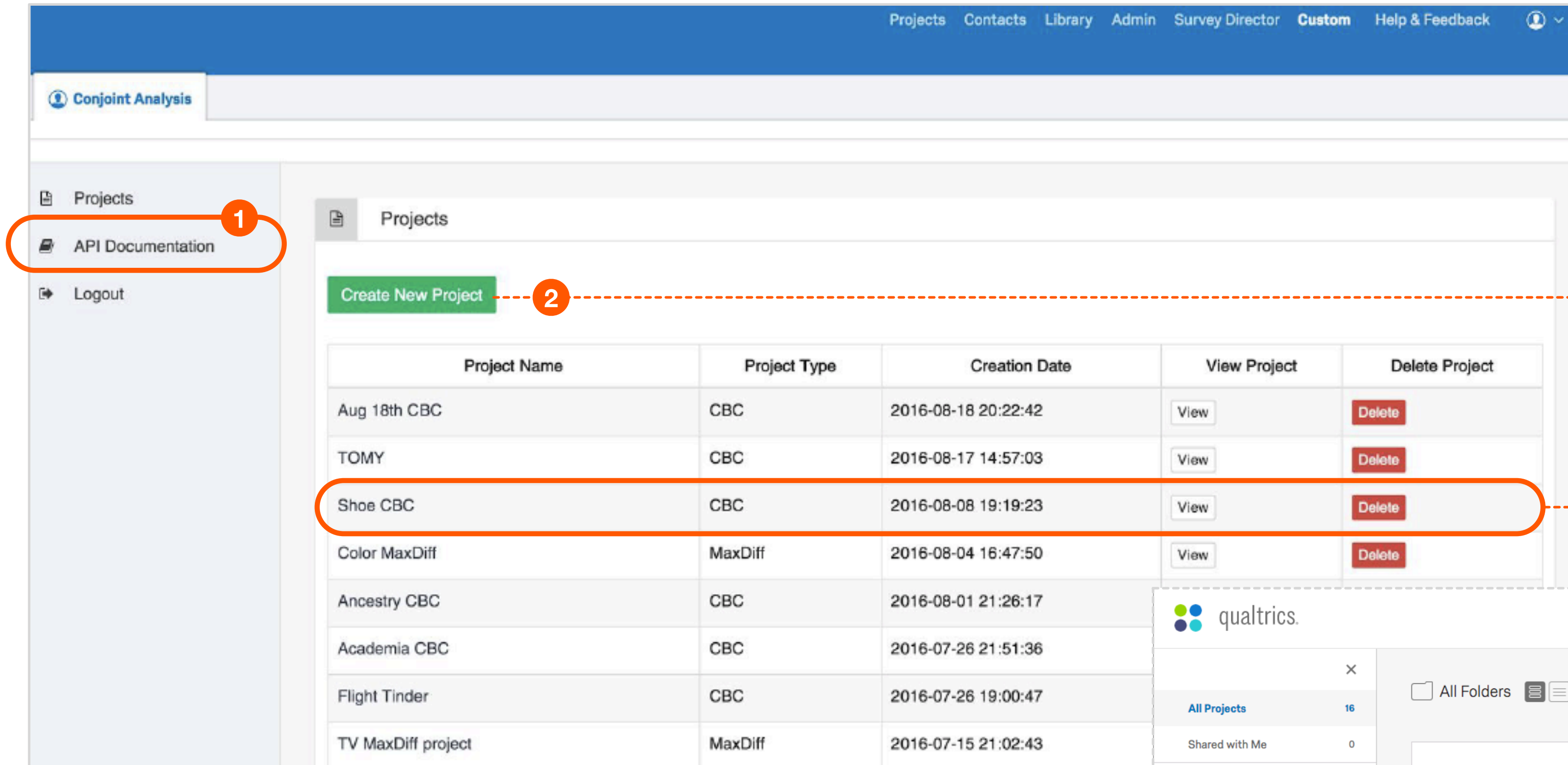
Fri Sep 22 2017

Includes:

- Reference docs for how conjoint works today
- Draft site map
- Refined v1 wireframes for setup and survey editor flows
- Added low-level wireframes for data and report views
- Updated birds-eye-view of project flow

Current Conjoint Landing Page --> Global Projects Page

Current Conjoint Analysis landing page under the “Add Ons” or “Custom” menu depending on the version they are on.



NOTES

1. API Documentation

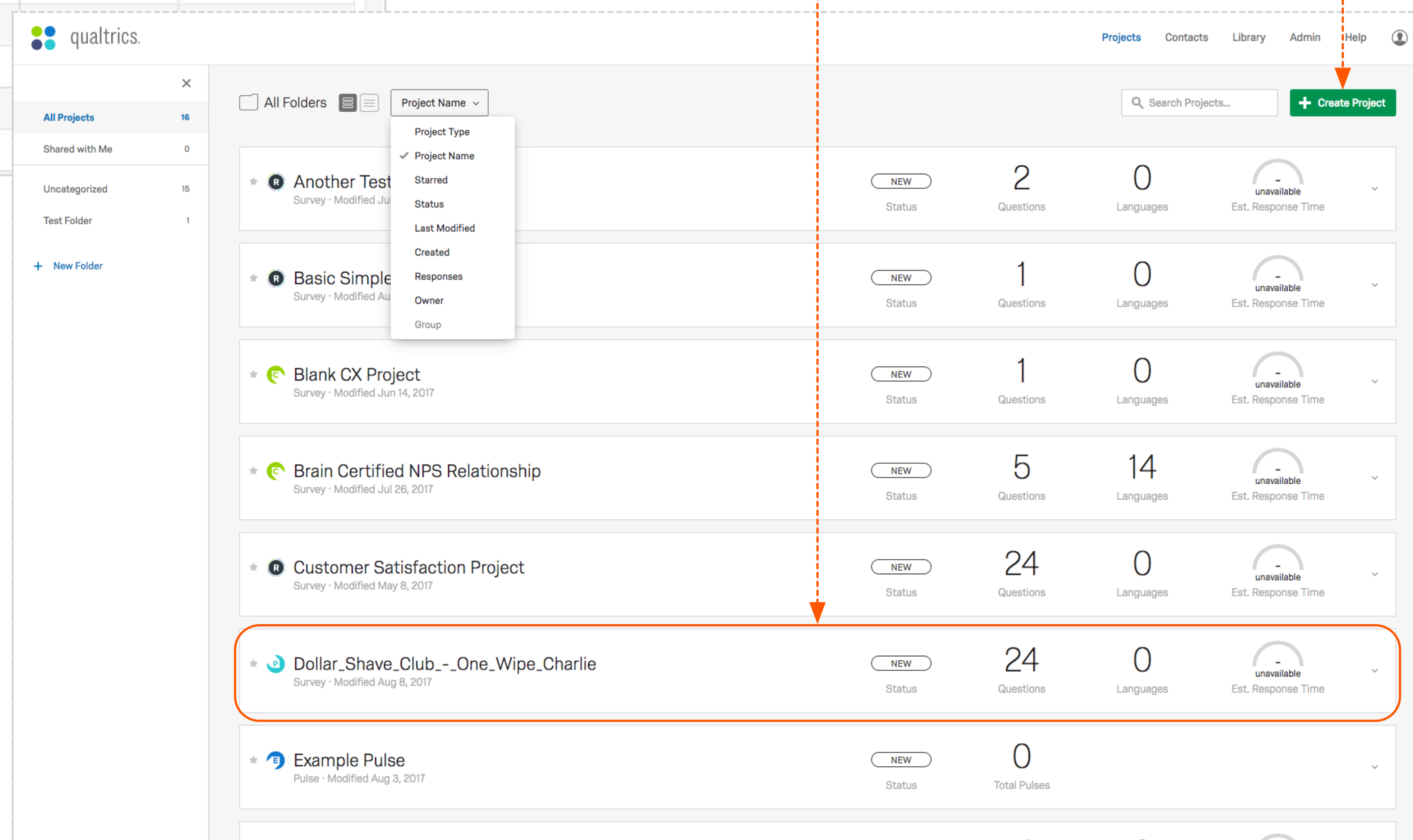
What is this exactly and how is it used today but the current customer base? We need to find a home for it.

2. Crete New Conjoint Projects

PX customers will be able to create Conjoint studies from the “Create Project” button on the Projects page.

3. View and Access Conjoint Projects

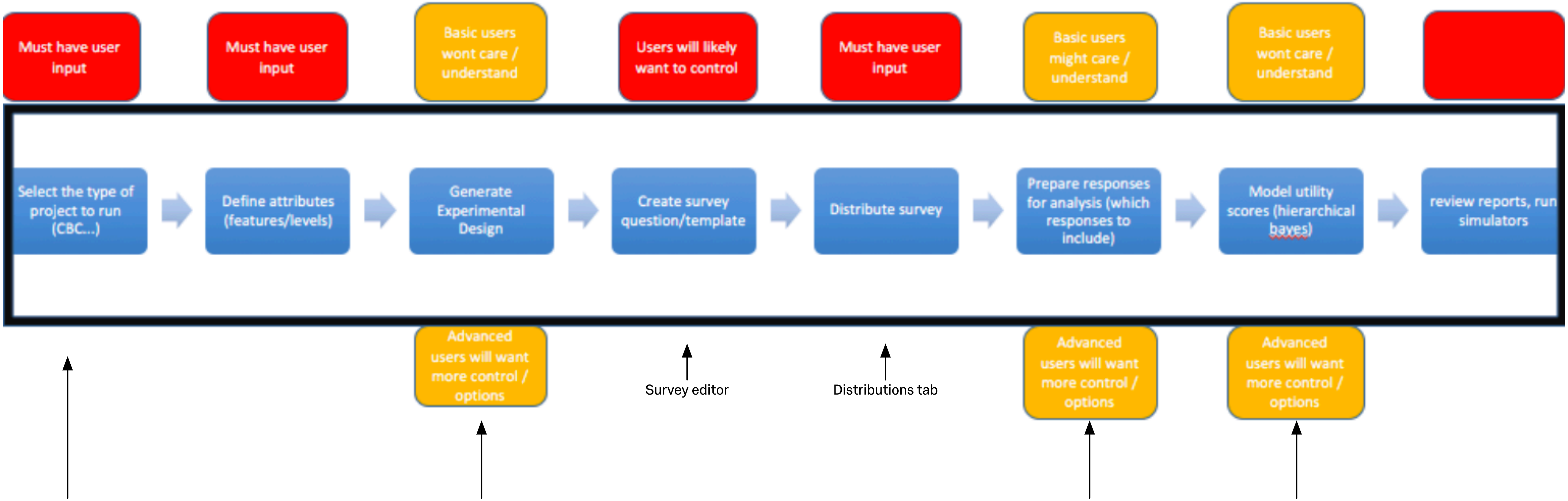
Each Conjoint Project will appear in the customer’s list of projects on the Projects page with the teal PX icon as shown here. We can determine which metrics make most sense to highlight in this view.



Latest view of the Projects page as shown today on Staging: https://st3.qualtrics.com/WRQualtricsControlPanel/

Conjoint Analysis Workflow

The following diagram was created by Craig Lutz to illustrate the required and optional steps of an ideal Conjoint Analysis workflow. The black text and arrows annotate how these steps of the flow can be executed within the current survey project framework today.



CBC and Max Diff would be different project types. As additional conjoint projects come to the fold, we will revisit if the selection should be made at the project level or within the project level.

Advanced user settings to be part of the "options" menu of the survey editor.

Assuming we have a default report that is generated, and researchers can edit using the report controls we have today. Is that right?

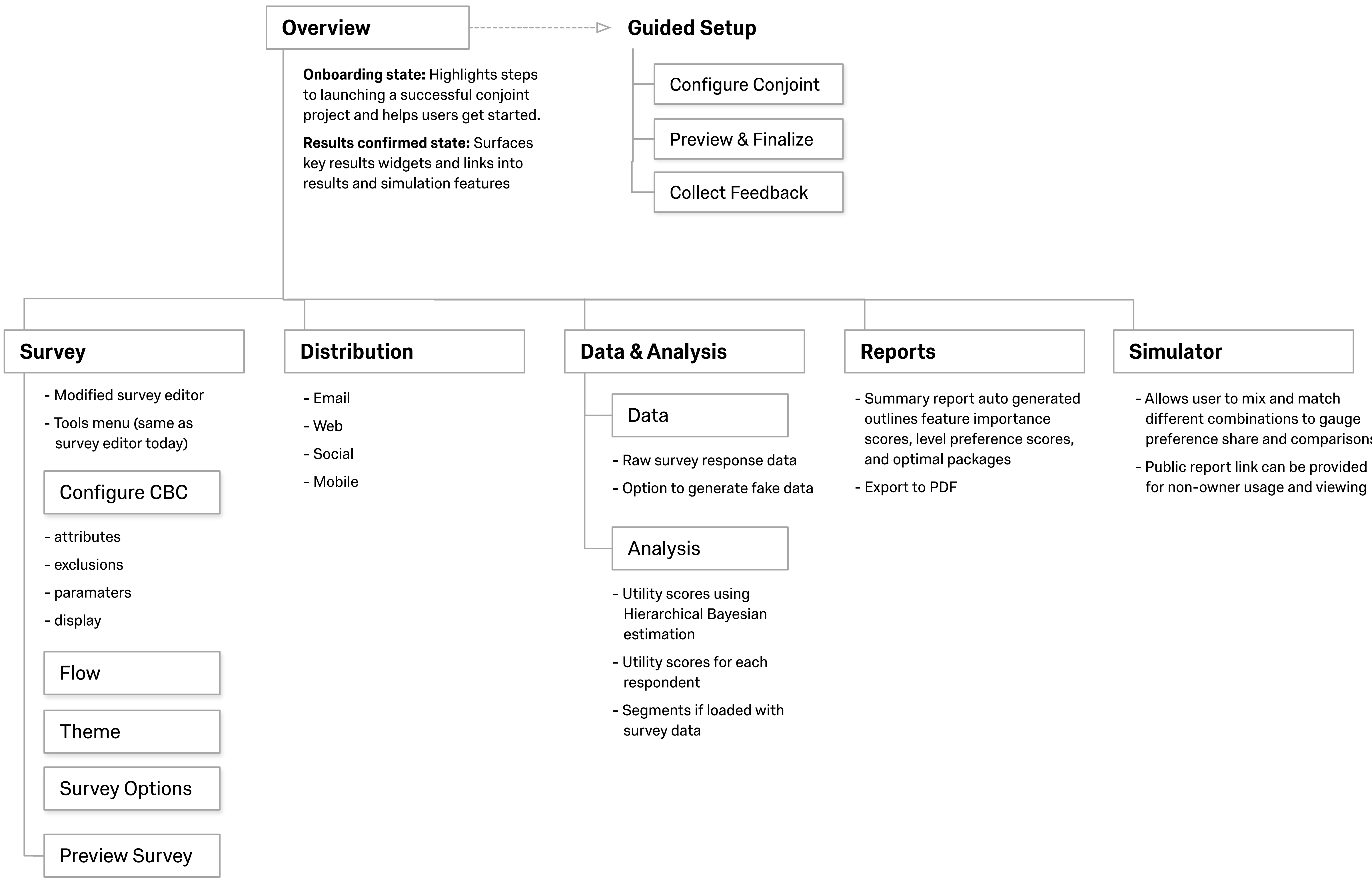
Or, is it better to use the dashboard module for this (vs report module)?

Is this the "Simulator" tool we have today? How much improvement/iteration do we see here for v1?

The Structure of a Conjoint Project (CBC)

Key: **MVP Page** Potential Future

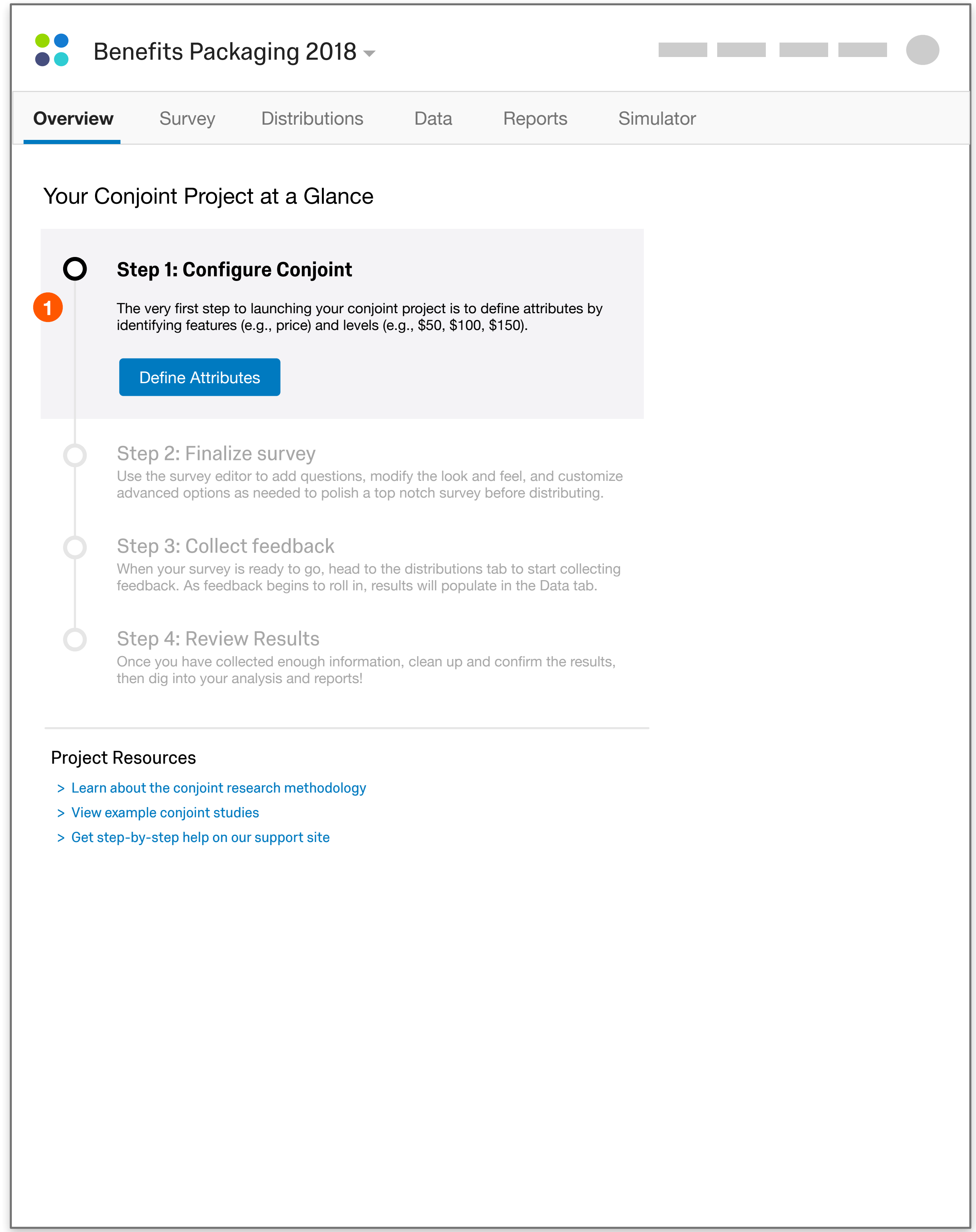
The sitemap below reflects conjoint functionality based on the current product and outlined in the [Conjoint Analysis Application - Steps to Success Doc](). The IA approach uses the current XM project framework, and incorporates some more future thinking concepts as appropriate for PX and the Conjoint Project type.



Overview (Default)

1. Define Attributes

Launches the guided setup window, as shown on the following wireframe.



1. Configure Conjoint

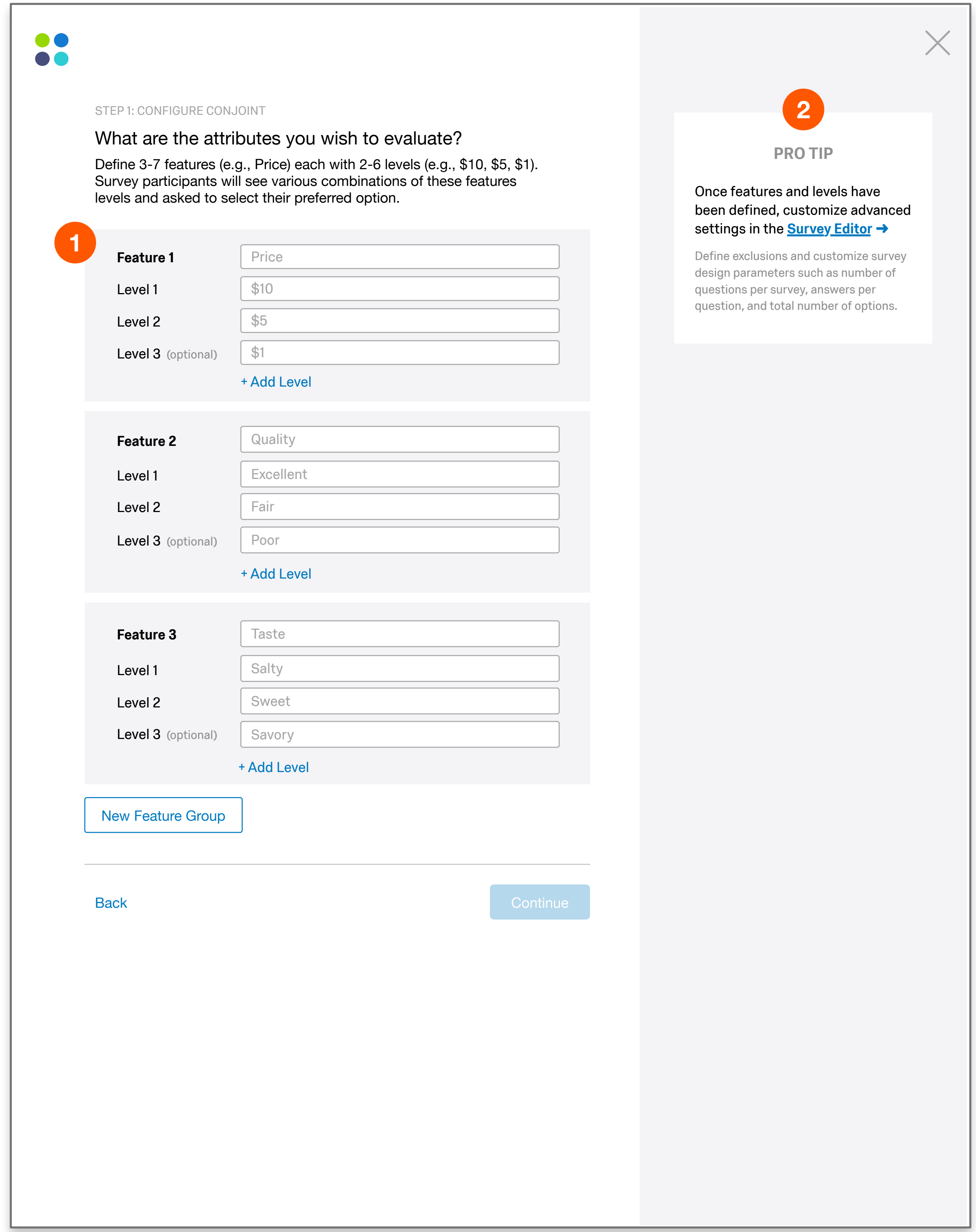
1. Attributes (Features & Levels)

This view is the only required step. Participants will have to entered at least 3 features, each with at least 2 levels to continue.

Question: will we allow users to add more than 7 features and more than 6 levels, even if it's not recommended?

2. Advanced options

More advanced researchers will look for ways to exclude pairs, view all permutations, and control specific details of the conjoint analysis. This will all be available from the survey editor under "Conjoint Options".



2. Preview & Finalize

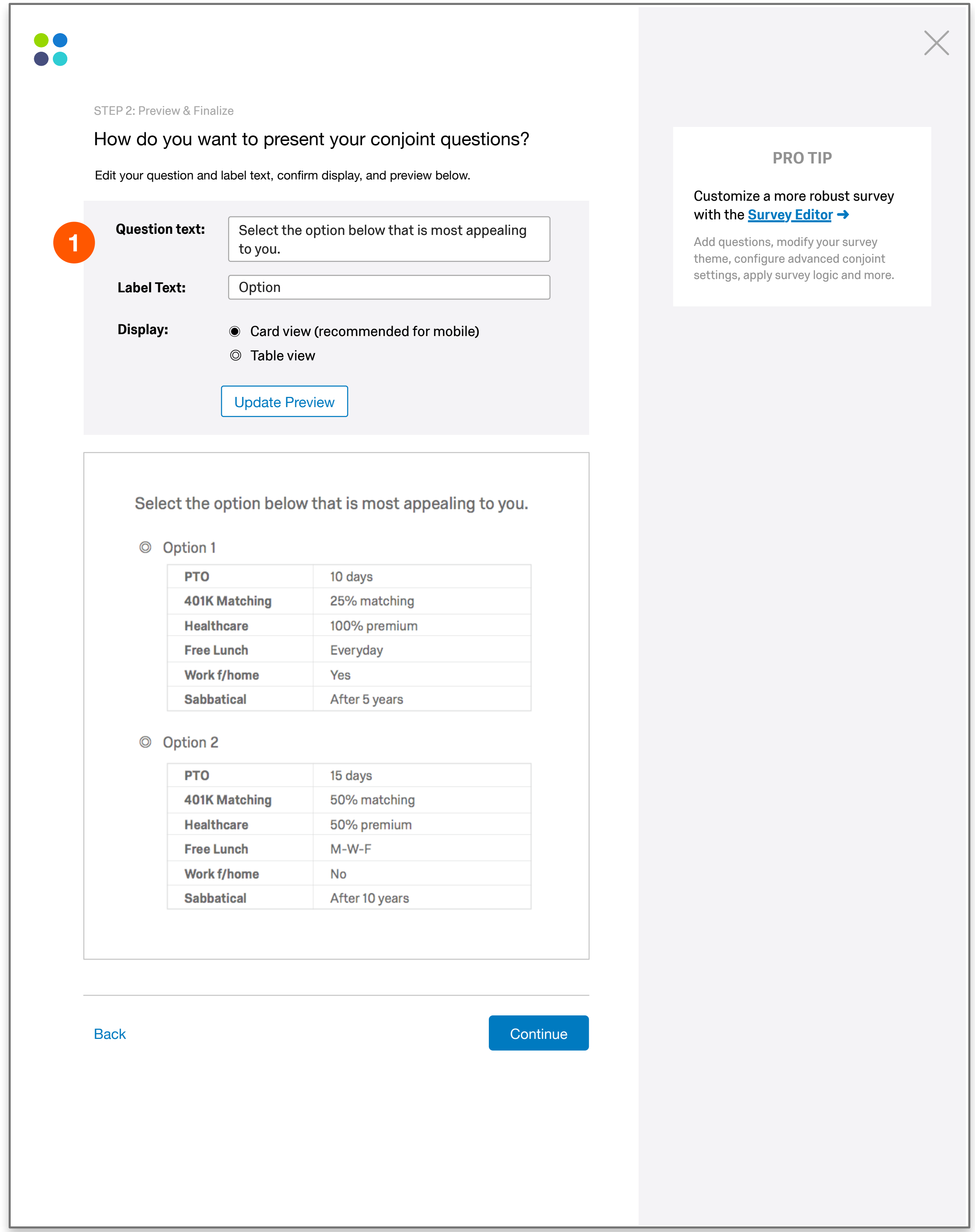
1. Minimum for "Preview & Finalize"

The idea here is to be present the most minimal experience for previewing the conjoint portion of the survey and finalizing display.

There's some cool explorations from EX and CX for how a more robust guided experience through a project end to end could work, but they both do require significant engineering effort across several teams.

> View concept for fully guided EX experience

> View concept for fully guided CX experience



3. Collect Responses

1. Minimum for “Collect Feedback”

Again, not trying to recreate the distribution tab for this v1 conjoint project… looking for a simple way to enable distribution, realizing the the power really live in target audience and functionality available from the Distributions tab.

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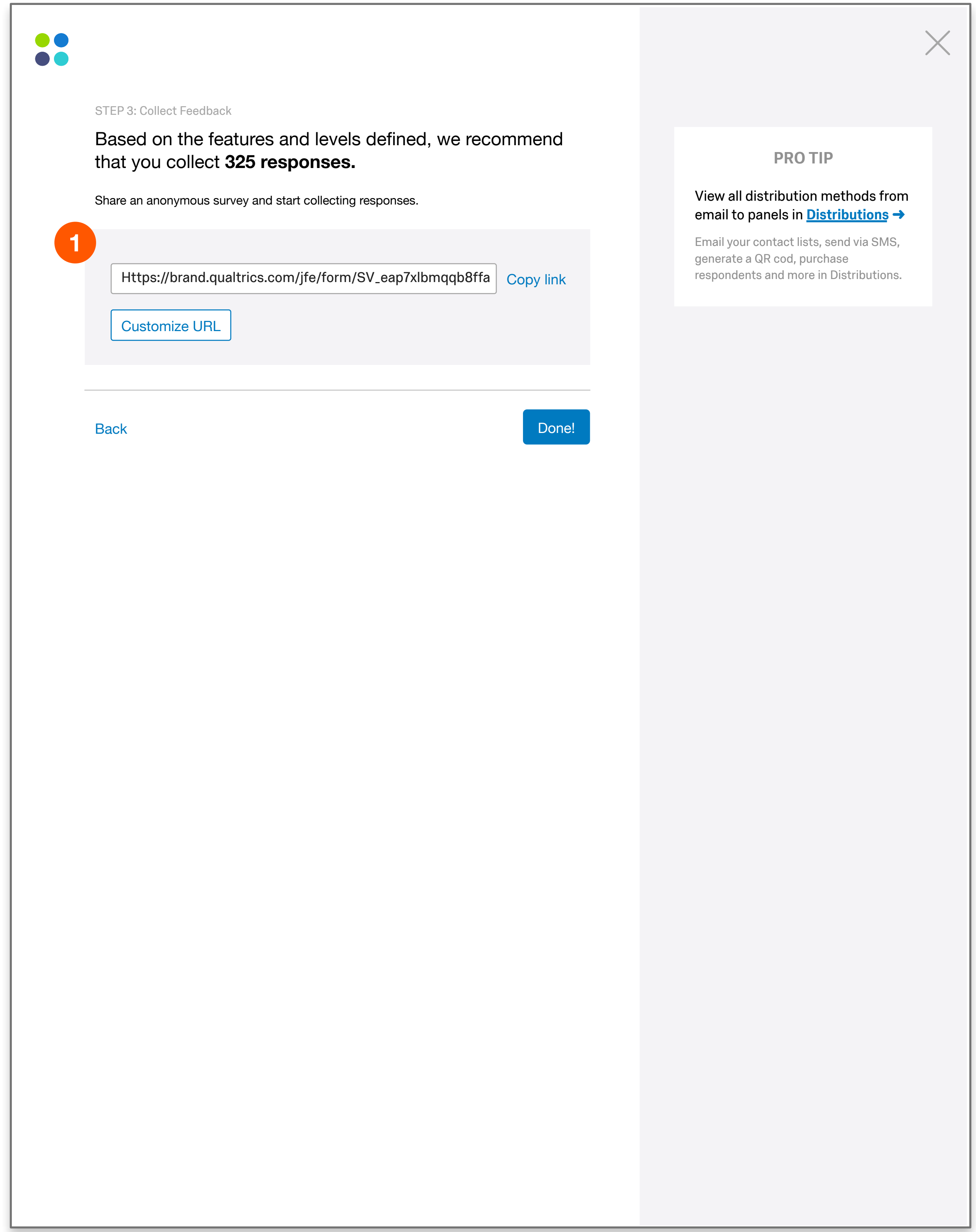
> View concept for fully guided EX experience

> View concept for fully guided CX experience



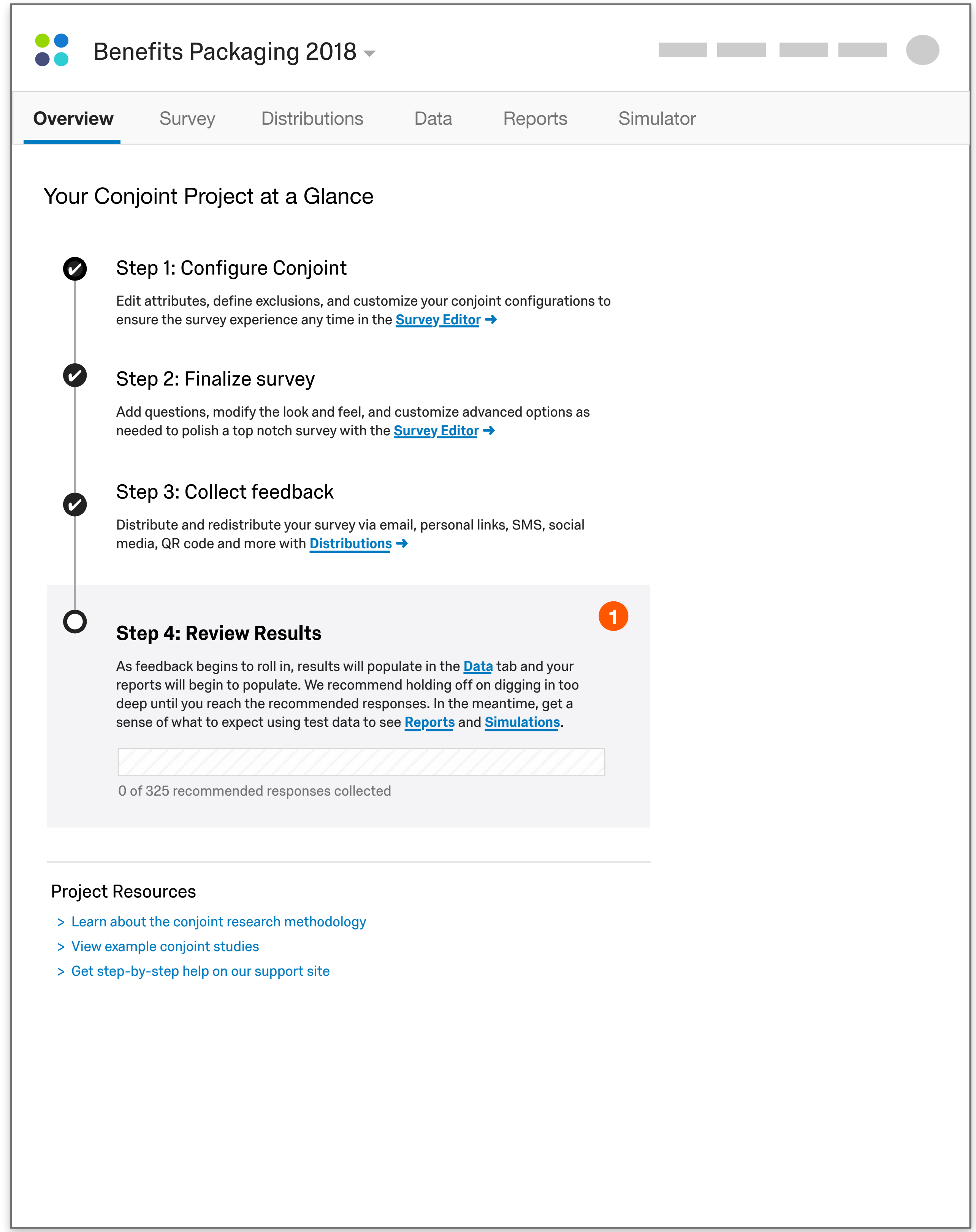
Overview - 1-3 complete

1. Steps 1-3 Complete

The progress bar persists as results come in to ensure that researchers have an intuitive way to dive deeper into any of the sections completed. The guided experience will no longer be accessible, but users can see how to use the more robust features by navigating through the progress bar or the project tabs.

2. Results in

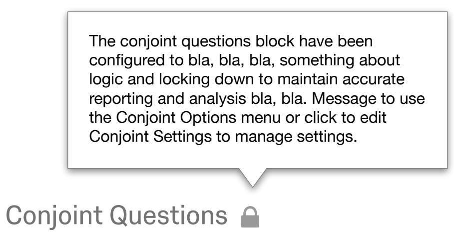
The Overview switches from the setup state to the analysis state after a certain number of results are in (either the recommended number, user controlled, or percentage of the recommended number – TBD).



Conjoint Questions Configured

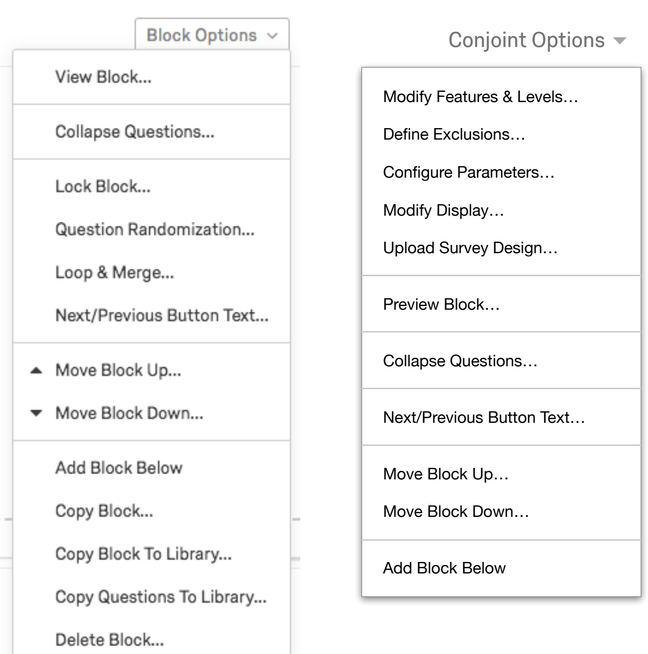
1. Conjoint Questions Block

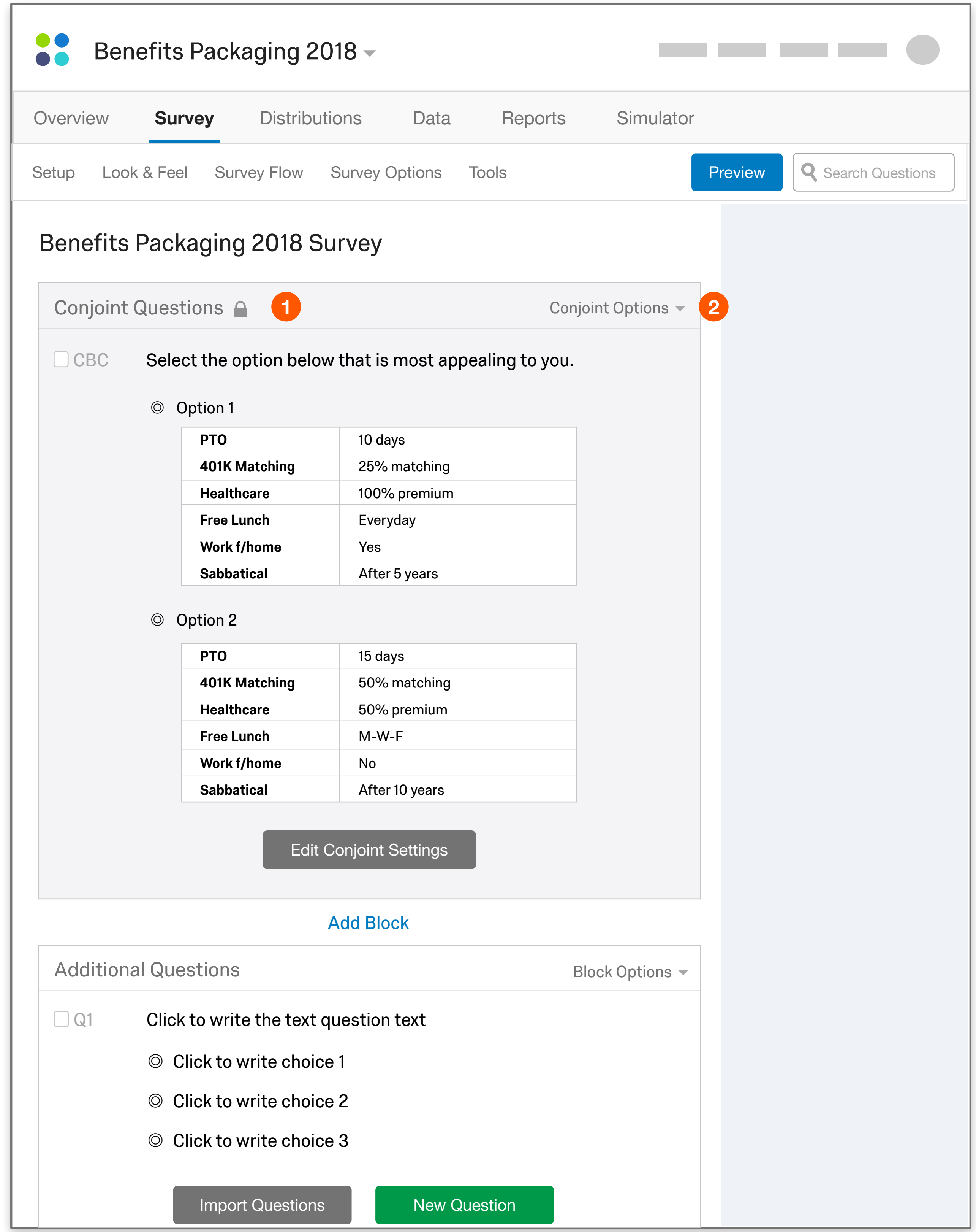
Reflecting conjoint questions in a block format allows users to move this portion of the survey around other questions and jump back into specific areas of the configurator (see note #2). We will want to style this in a way that shows the block as special to reinforce why certain elements are locked. That said, the question label should be editable in the same way question labels are editable in other question blocks (or add this field to the configurator).



2. Conjoint Options

A modified block options menu enables users to move the block around and jump to specific areas of the configurator.

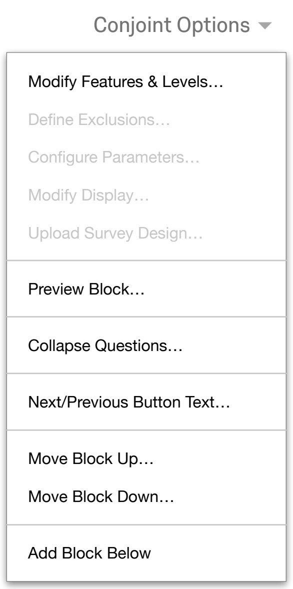


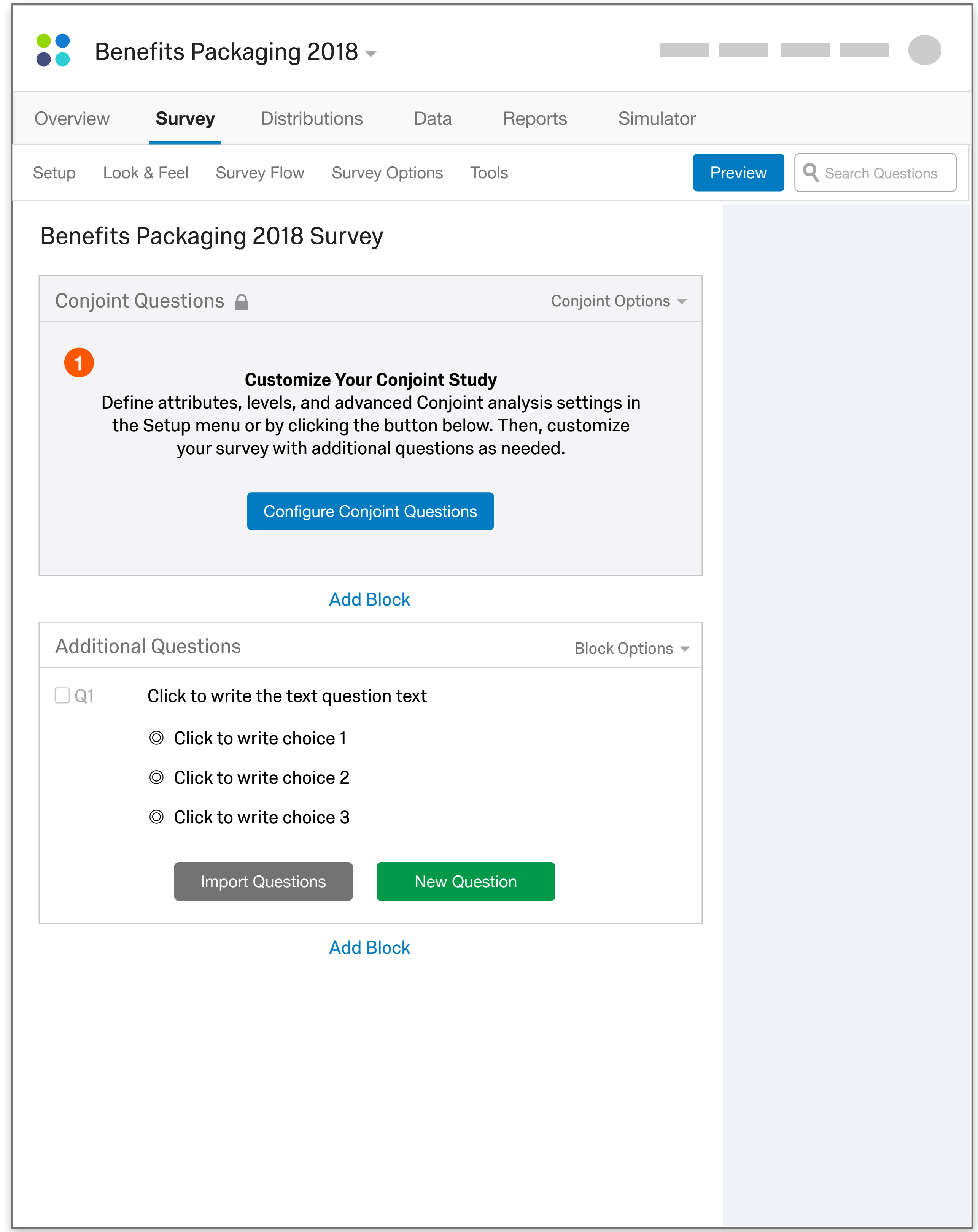


Survey Editor (default)

1. Default survey editor

If someone navigates to the survey editor before attributes are configured, they see this alternate state prompting them to define attributes. This state needs modified view of the options menu:





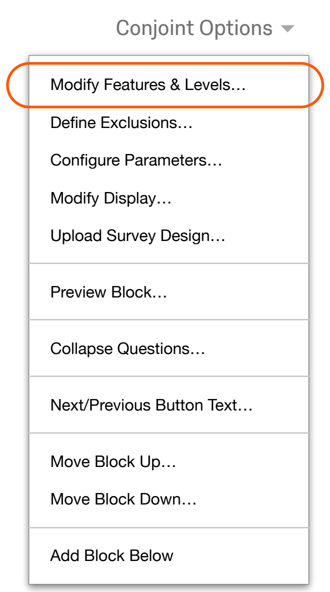
Advanced: Modify Attributes

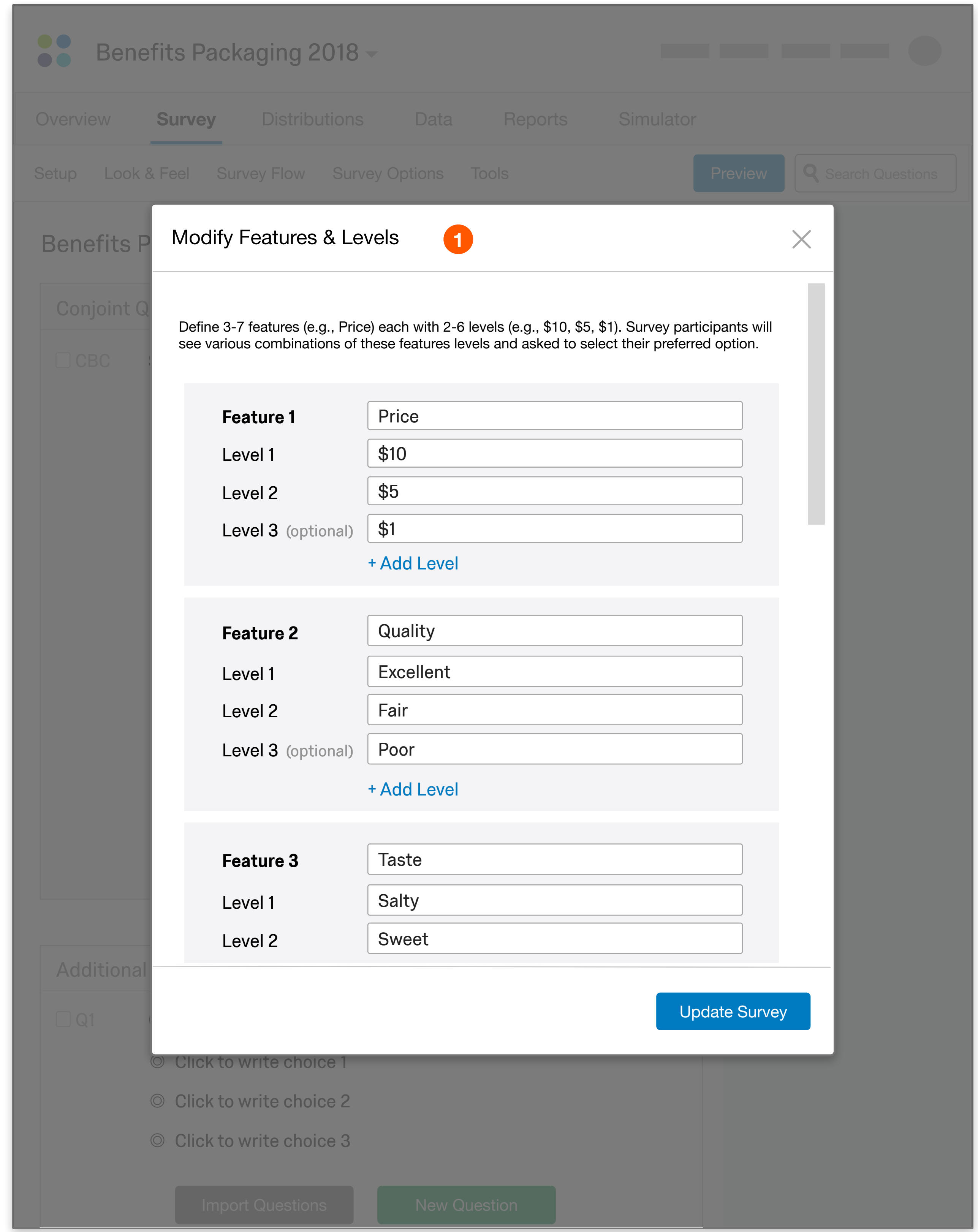
1. Modify Features & Levels

Features and levels should be accessible via mobile in addition to the guided walkthrough displayed earlier. This ensures easy intuitive access for someone within the survey editor to define attributes.

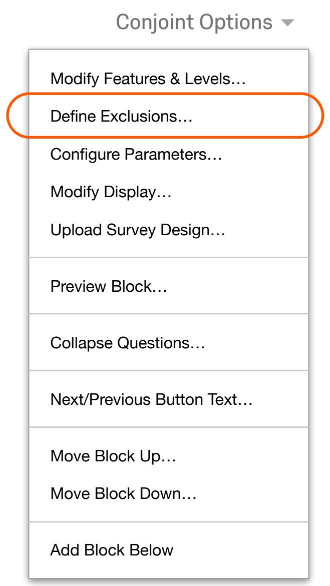
2. Navigation to the Features & Levels Modal

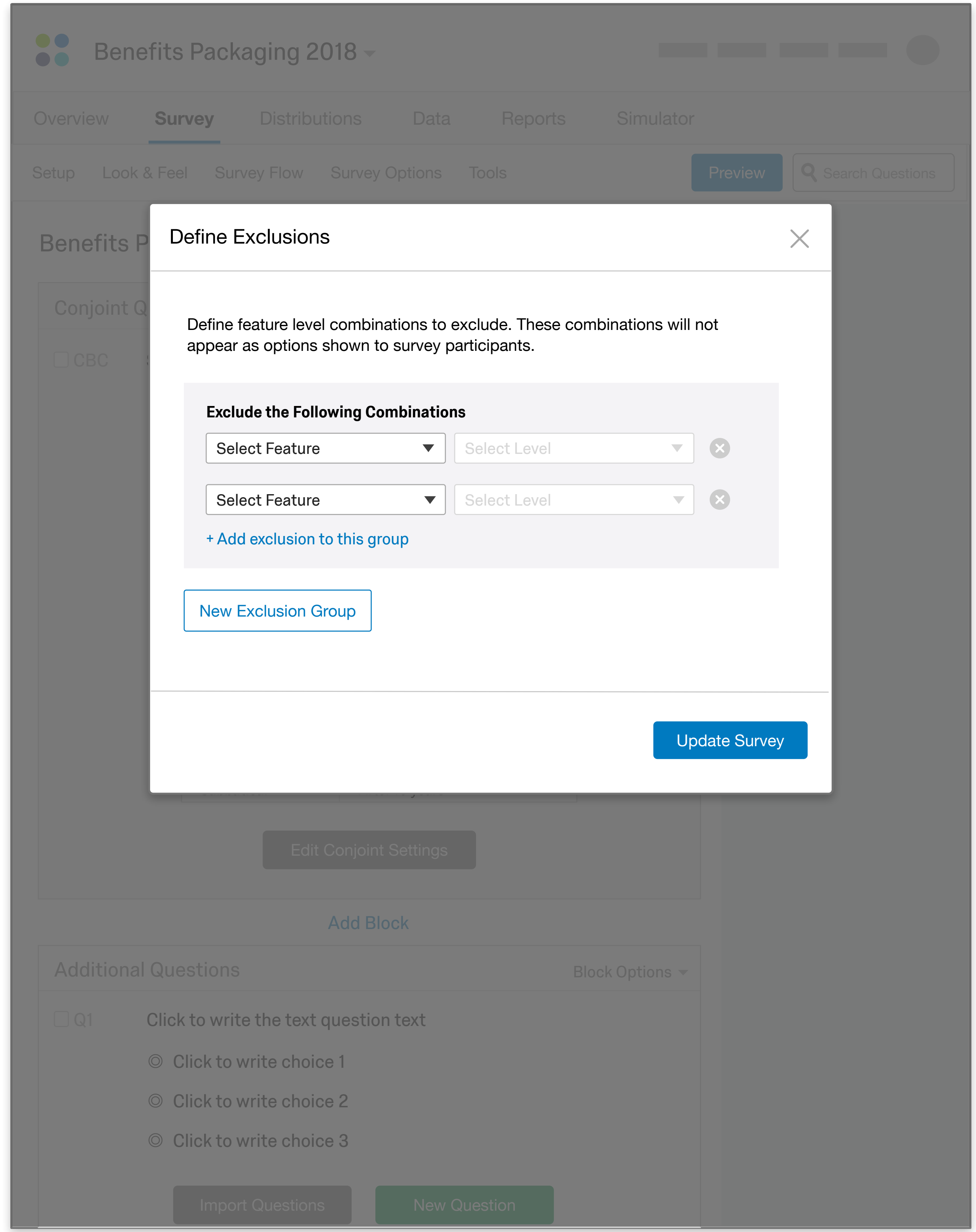
Those who skipped the guided setup will see this screen after clicking the “Define Attributes” CTA as shown on the previous page. As with all other important conjoint features, this section is also available via the “Conjoint Options” menu on the conjoint block:



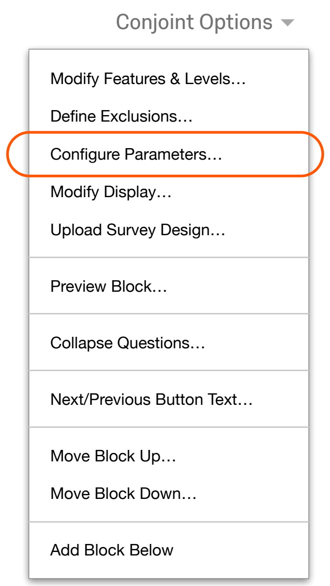


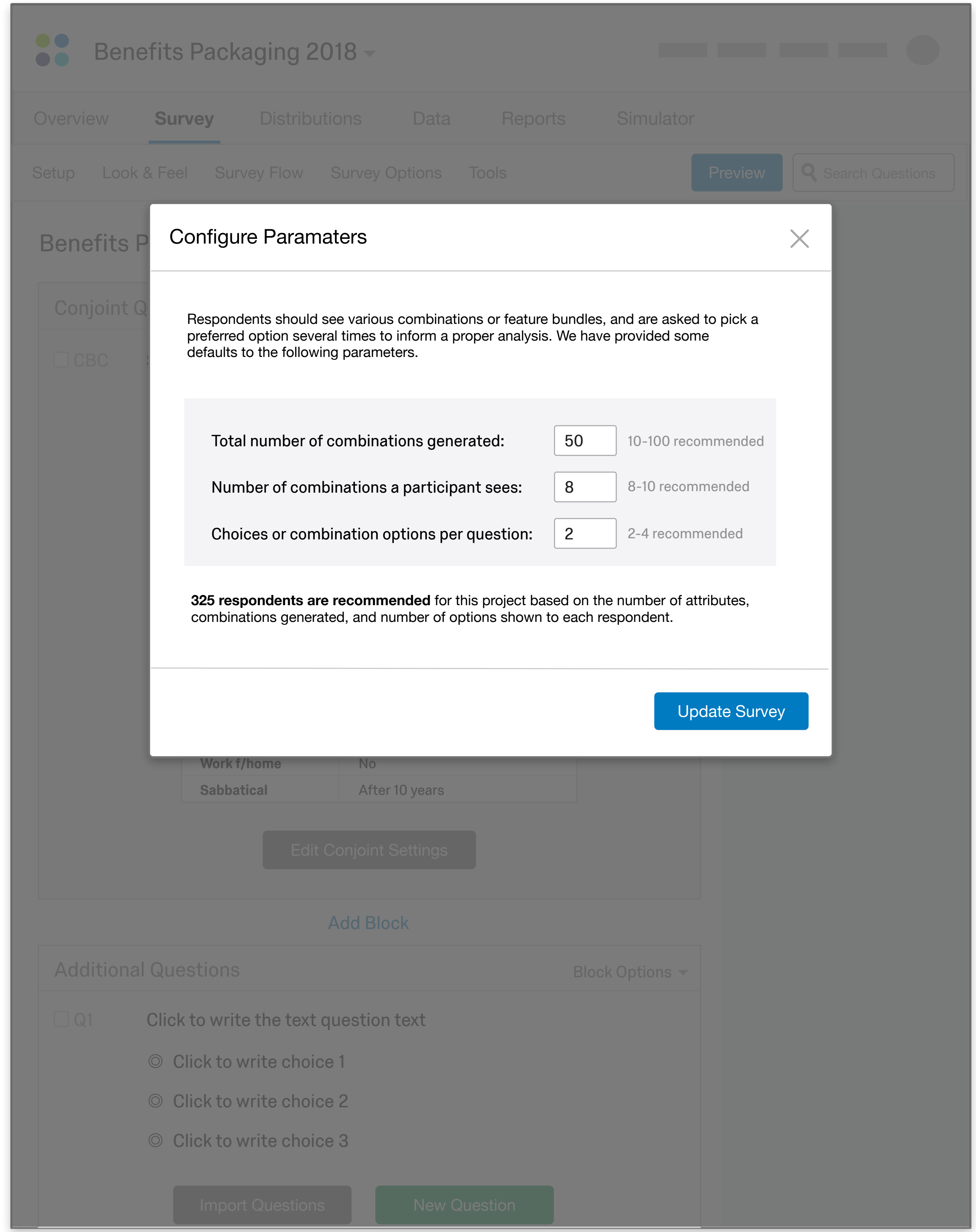
Advanced: Define Exclusions



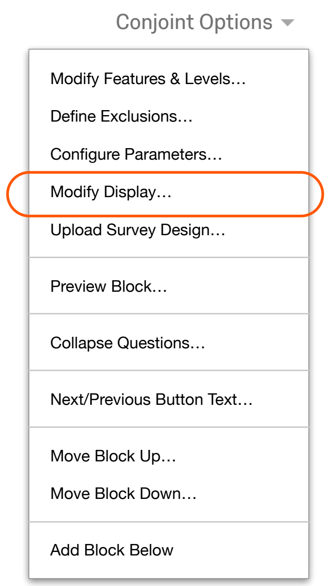


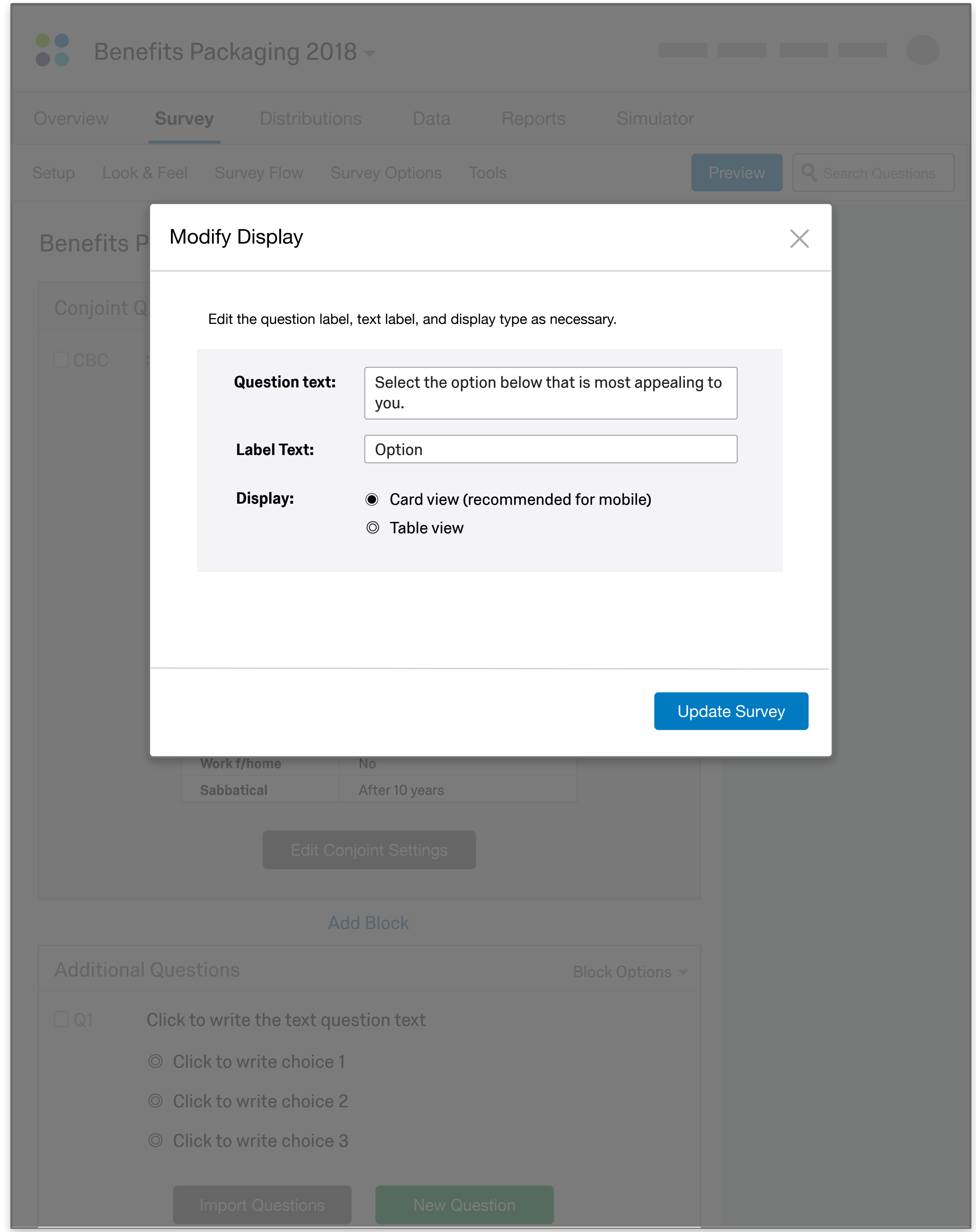
Advanced: Configure Paramaters





Advanced: Modify Display

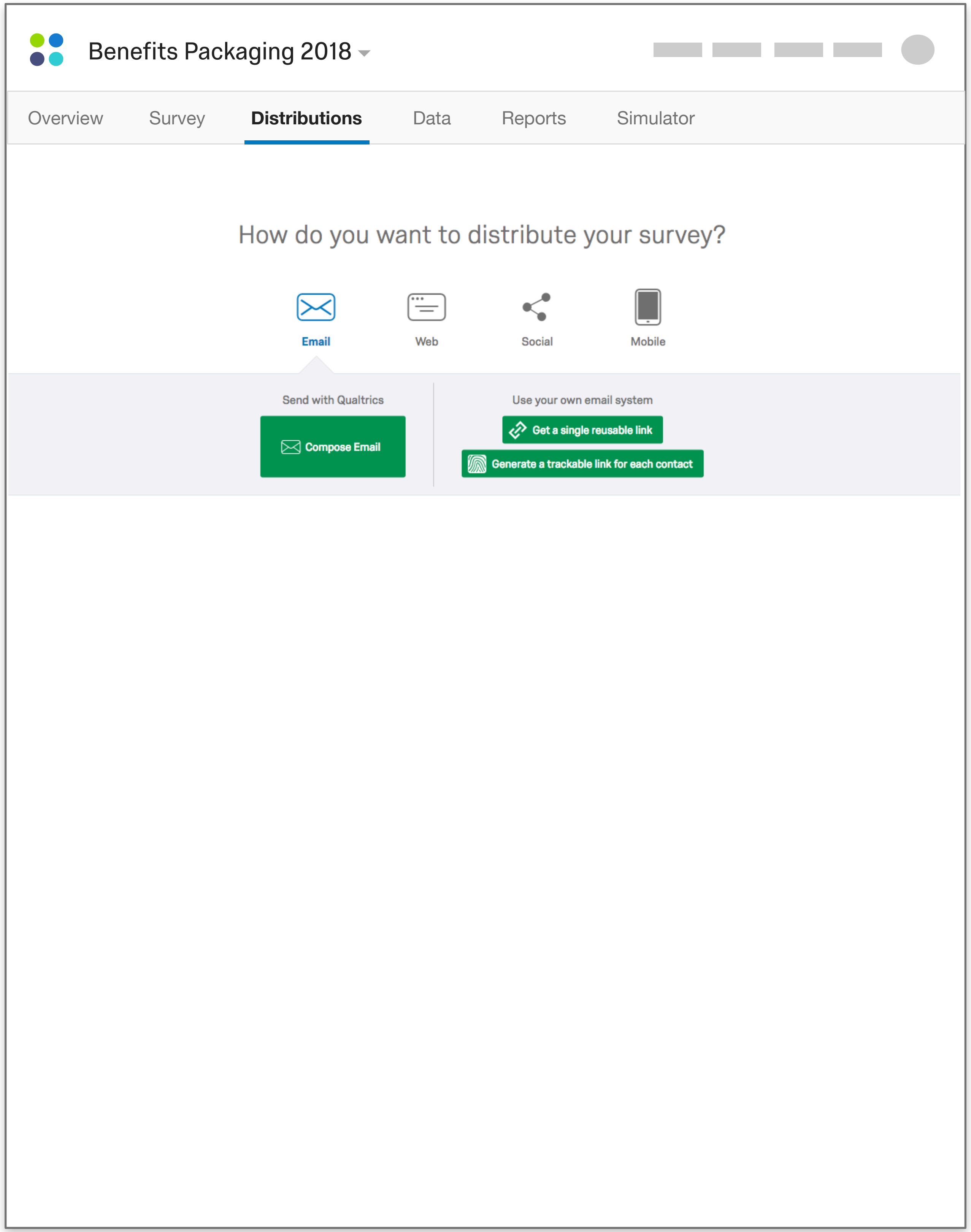




Distributions

1. Distributions tab, BAU

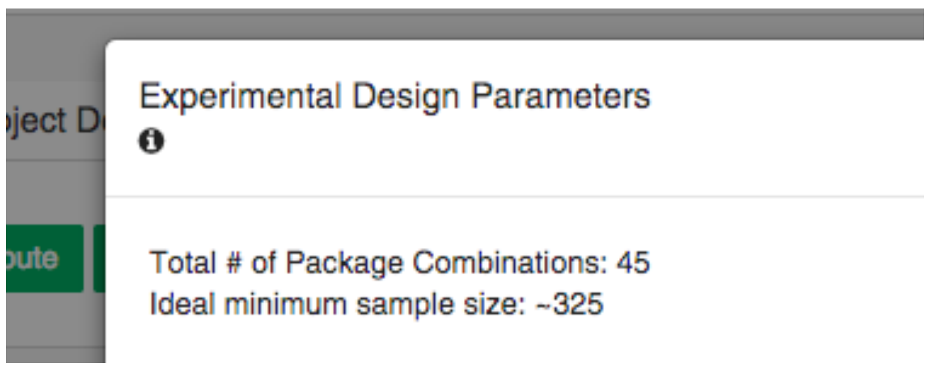
The distributions tab should be able to use the same modules as used in a basic survey project today.



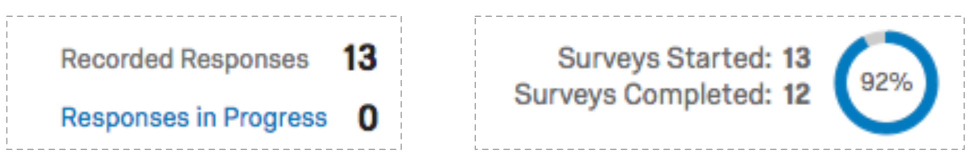
Data

1. Percentage of recommended responses collected

The conjoint method distributes a subset of potential packaging options to each participant in order to reduce user fatigue. The total number of packages, number of packages each participant sees, number of attributes, etc. all contribute to how many responses are recommended for meaningful results. This metric is used today in conjoint:



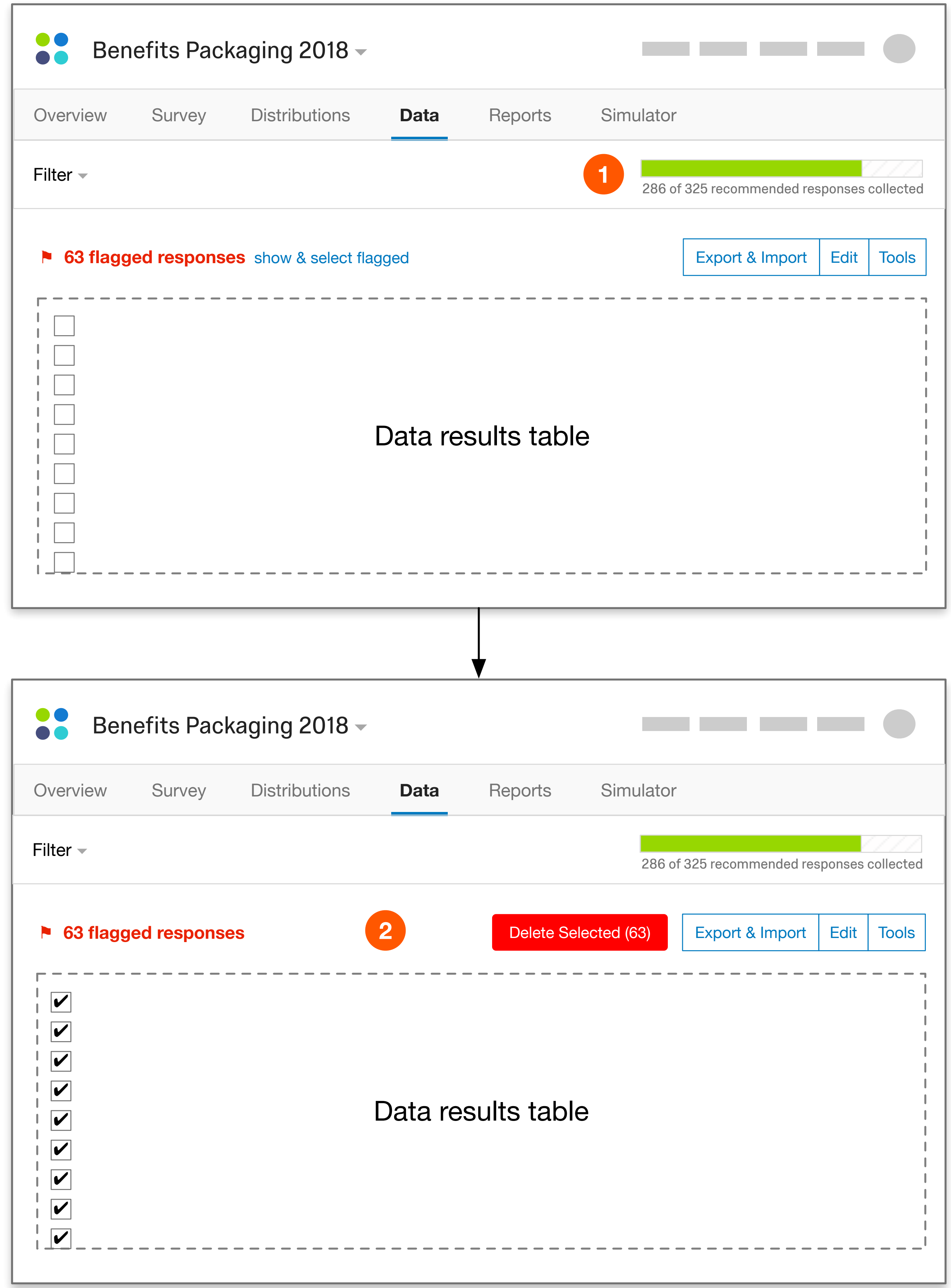
This area of the Data tab is already used to show a breakdown of responses (left is from the Data tab; right is from the Cross Tabs):



2. Current functionality in the data tab

Today, users import data into Conjoint via CSV, so it's assumed that data is scrubbed before imported. To provide the best analysis, the team brainstormed several solutions to enable this UI to help clean data, particularly around flagging responses and defining segments.

How are responses flagged and segments defined in the core platform today? Is this functionality that has been designed or discussed, or something the PX team should take on if deemed critical?



Reports: Conjoint Results

Wireframe Note!

This is an ugly, smooshy display of screenshots for scoping and concept-level discussions.

1. Conjoint Analysis Widgets

We'd like to create widgets for for the following based on what is available in the Conjoint tool today:

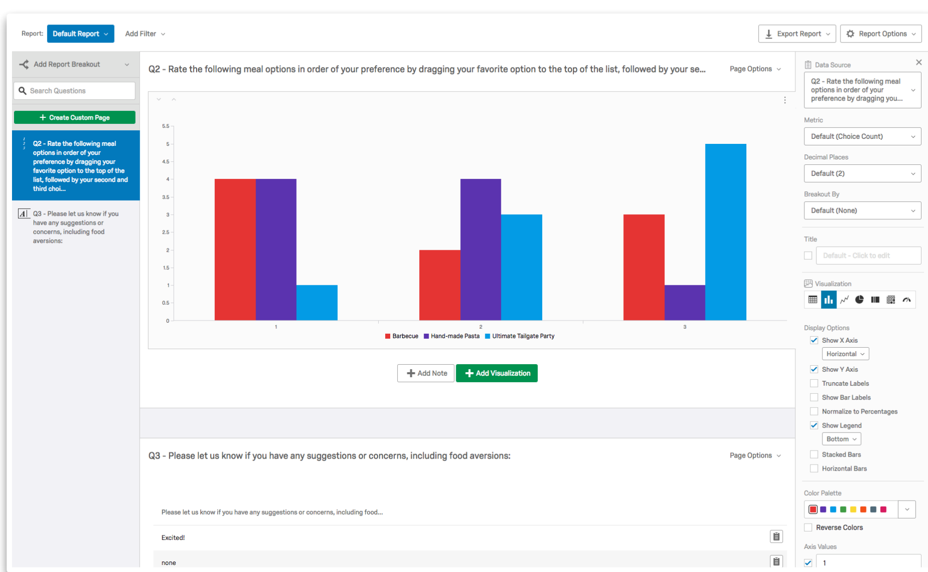
a. Feature importance distribution by utility score
b. Optimal package
c. Breakdown of feature importance and level preference
d. Feature importance line chart

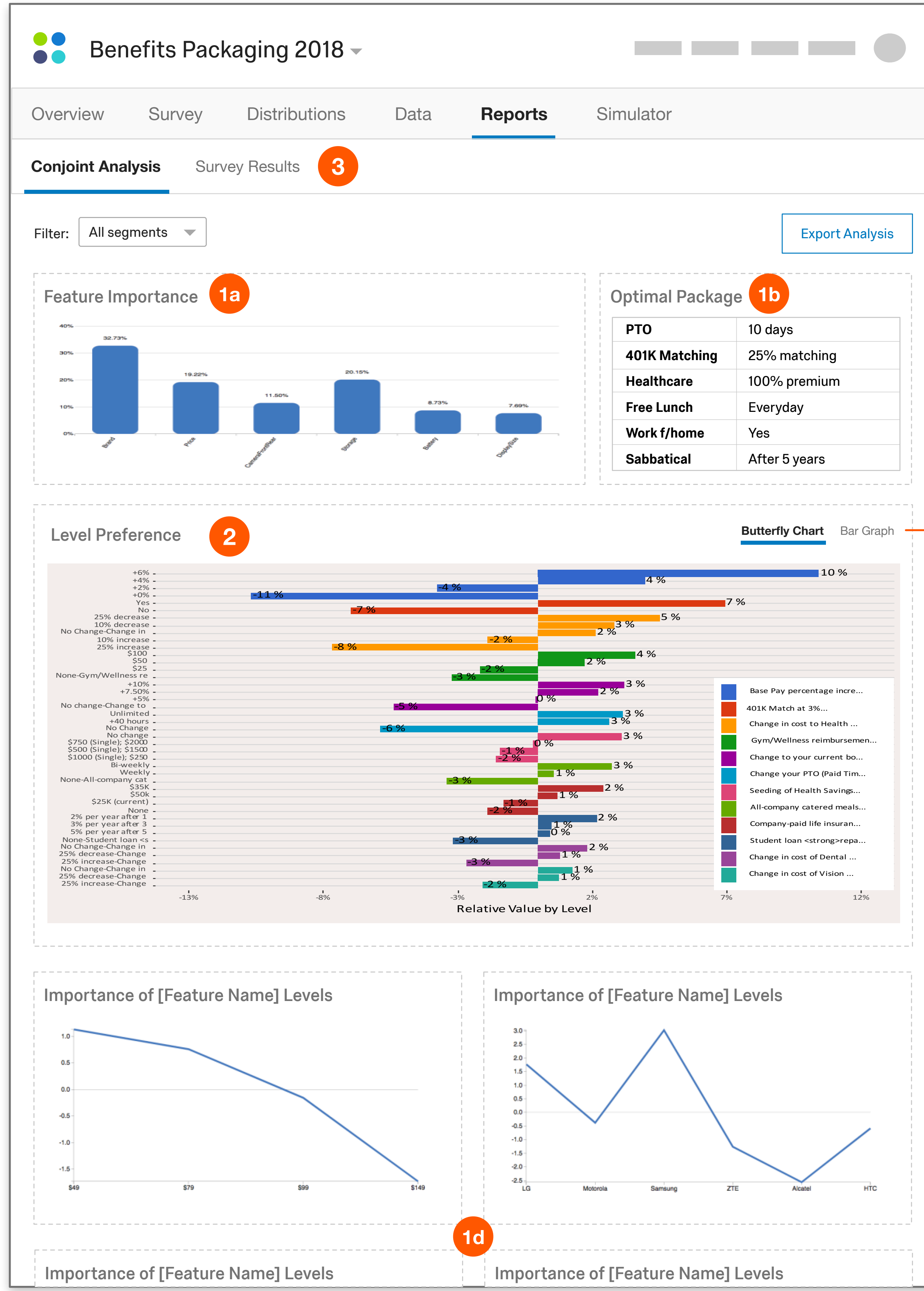
2. New, competitive visualization

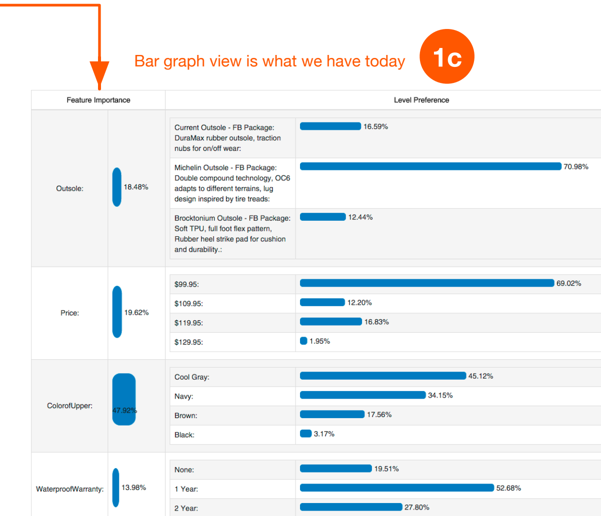
In addition to the conjoint widgets we use today, we'd also like to include a visualization that breaks down each level in a butterfly chart. This is something Conjoint.ly does well and a useful visualization for novice and advanced users alike.

3. Survey Results

Same as the "Results" tab in the survey project today to only show non-conjoint questions, including edit functionality:







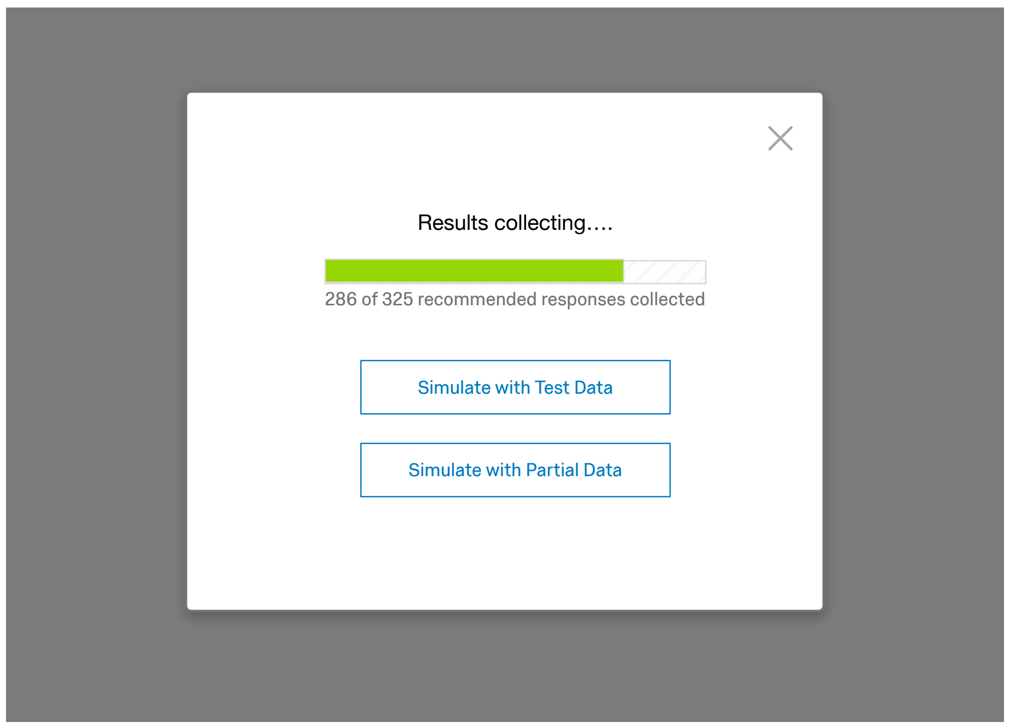
Simulator

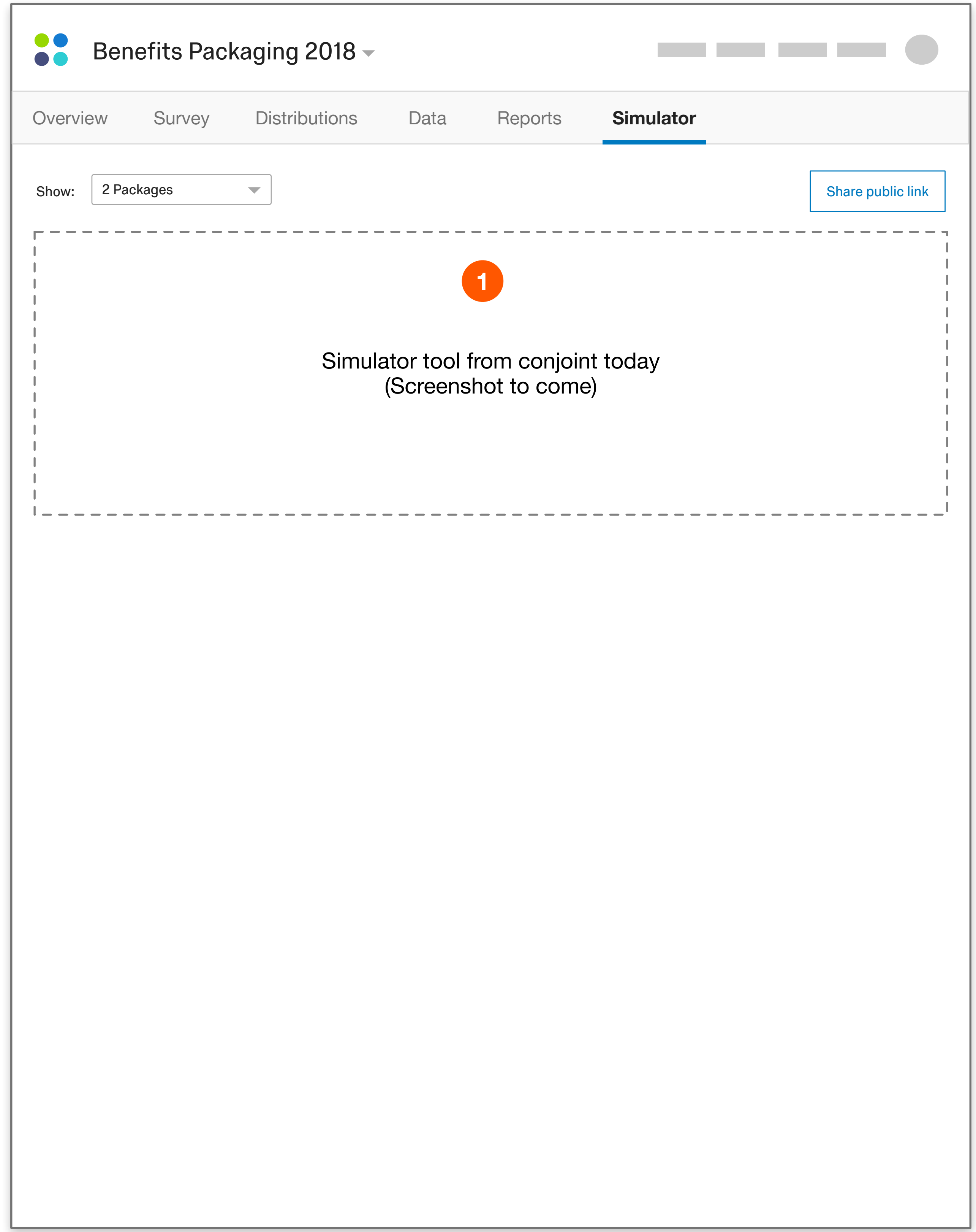
1. Simulator

Ideally, this can be pretty much what it is today in the Conjoint tool.

2. Data still collecting

If data is incomplete based on recommended responses, we should let users choose whether the want to see the simulator with test data or with their partial responses. This UI solution demonstrates a modal that displays over the page for users to choose:

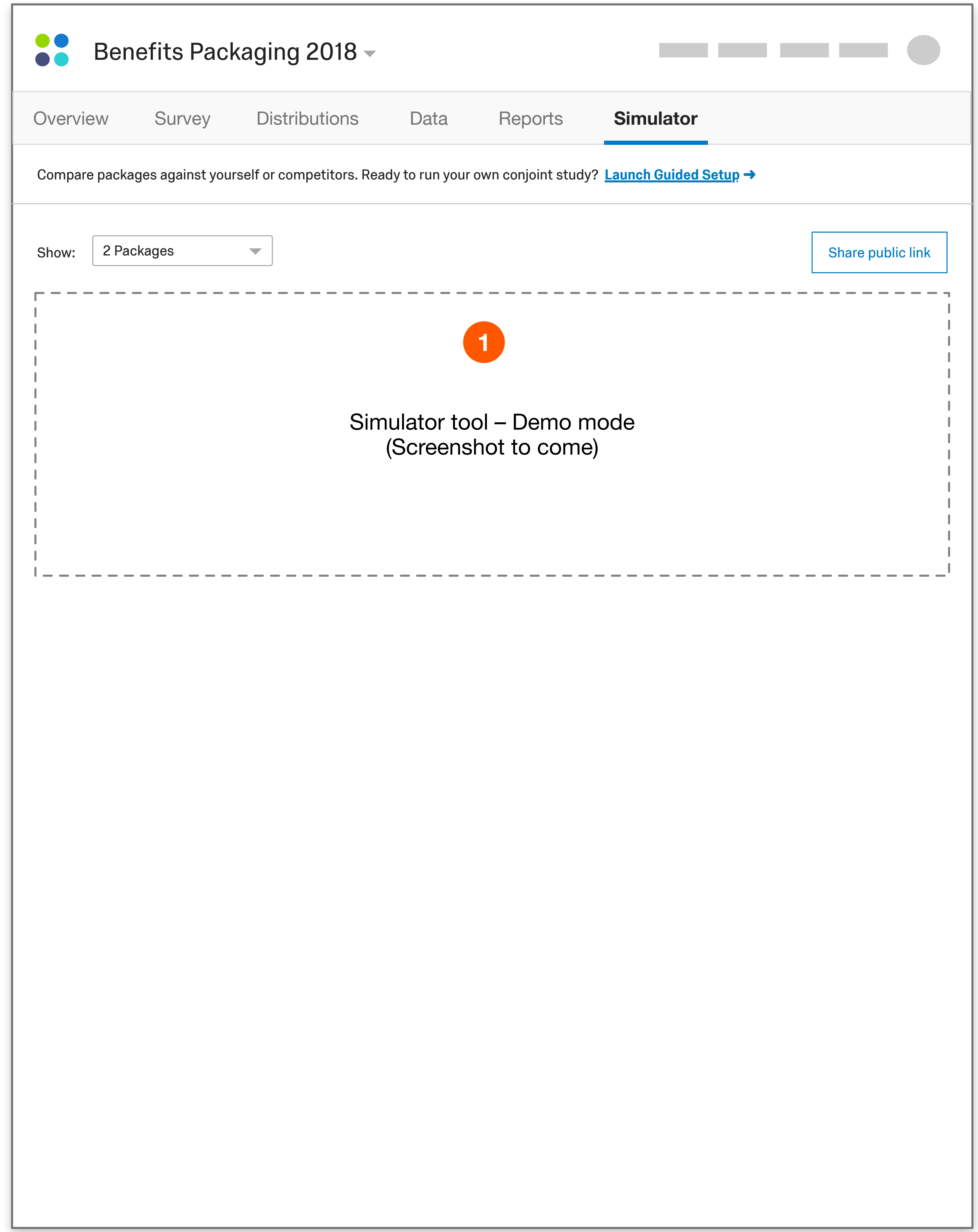




Simulator (Demo)

1. Simulation Demo

We'd like to be able to show a dummy data view of this page for users who have not yet setup their study.



Overview (Analysis)

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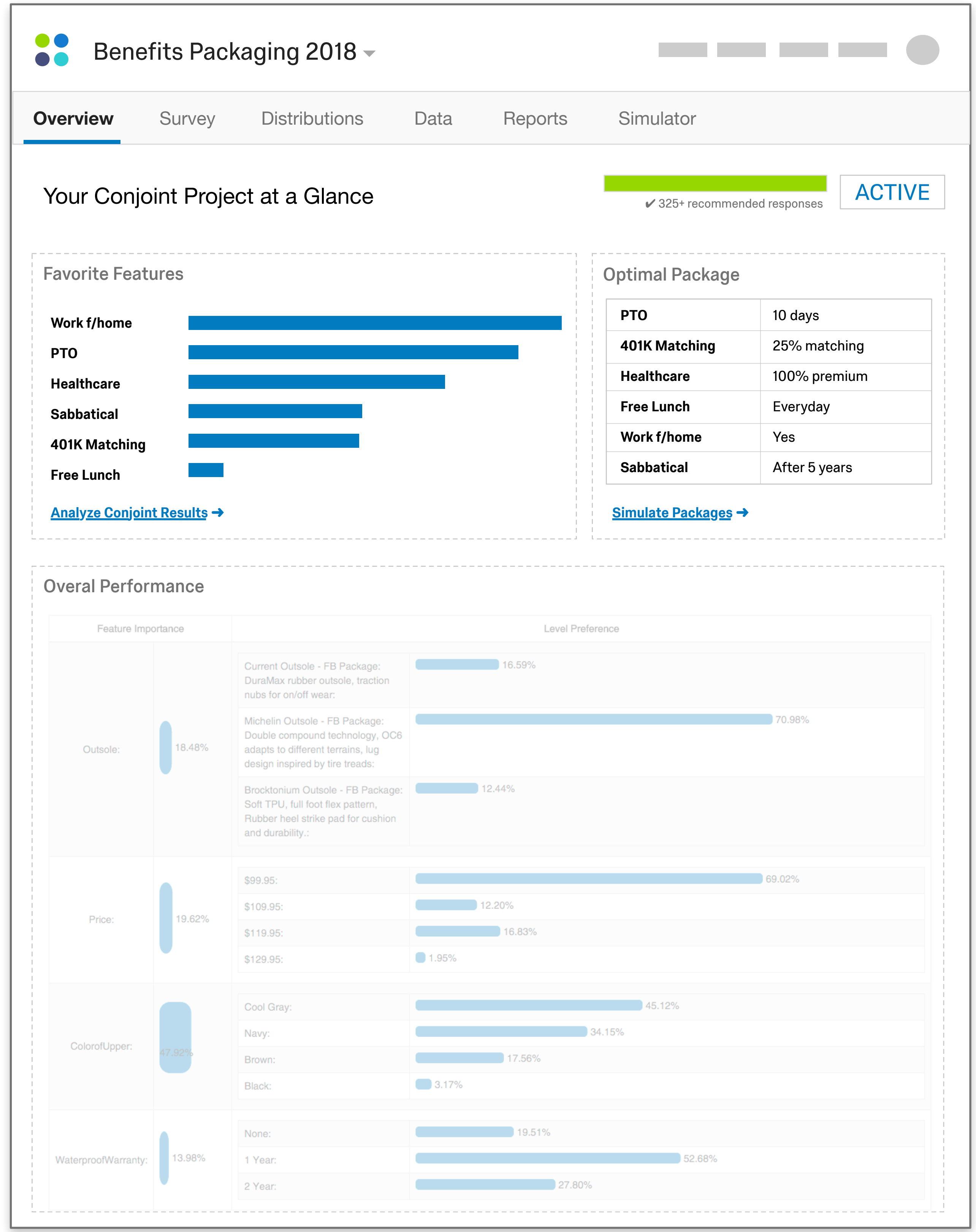

Get Started with CBC Flow (DRAFT)