

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.

The image illustrates the transition from the current Conjoint Analysis landing page to the new Global Projects page. The left side shows the current landing page with a sidebar menu (1), a 'Create New Project' button (2), and a table of projects (3). The right side shows the new Global Projects page with a search bar, a 'Create Project' button, and a list of project cards with metrics like Questions, Languages, and Est. Response Time. A dashed orange line connects the 'Create New Project' button to the 'Create Project' button, and another dashed orange line connects the 'Shoe CBC' project row to a project card in the new view.

Project Name	Project Type	Creation Date	View Project	Delete Project
Aug 18th CBC	CBC	2016-08-18 20:22:42	View	Delete
TOMY	CBC	2016-08-17 14:57:03	View	Delete
Shoe CBC	CBC	2016-08-08 19:19:23	View	Delete
Color MaxDiff	MaxDiff	2016-08-04 16:47:50	View	Delete
Ancestry CBC	CBC	2016-08-01 21:26:17	View	Delete
Academia CBC	CBC	2016-07-26 21:51:36	View	Delete
Flight Tinder	CBC	2016-07-26 19:00:47	View	Delete
TV MaxDiff project	MaxDiff	2016-07-15 21:02:43	View	Delete

Project Name	Status	Questions	Languages	Est. Response Time
Another Test	NEW	2	0	unavailable
Basic Simple	NEW	1	0	unavailable
Blank CX Project	NEW	1	0	unavailable
Brain Certified NPS Relationship	NEW	5	14	unavailable
Customer Satisfaction Project	NEW	24	0	unavailable
Dollar_Shave_Club_-_One_Wipe_Charlie	NEW	24	0	unavailable
Example Pulse	NEW	0	0	unavailable

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. Create New Conjoint Projects

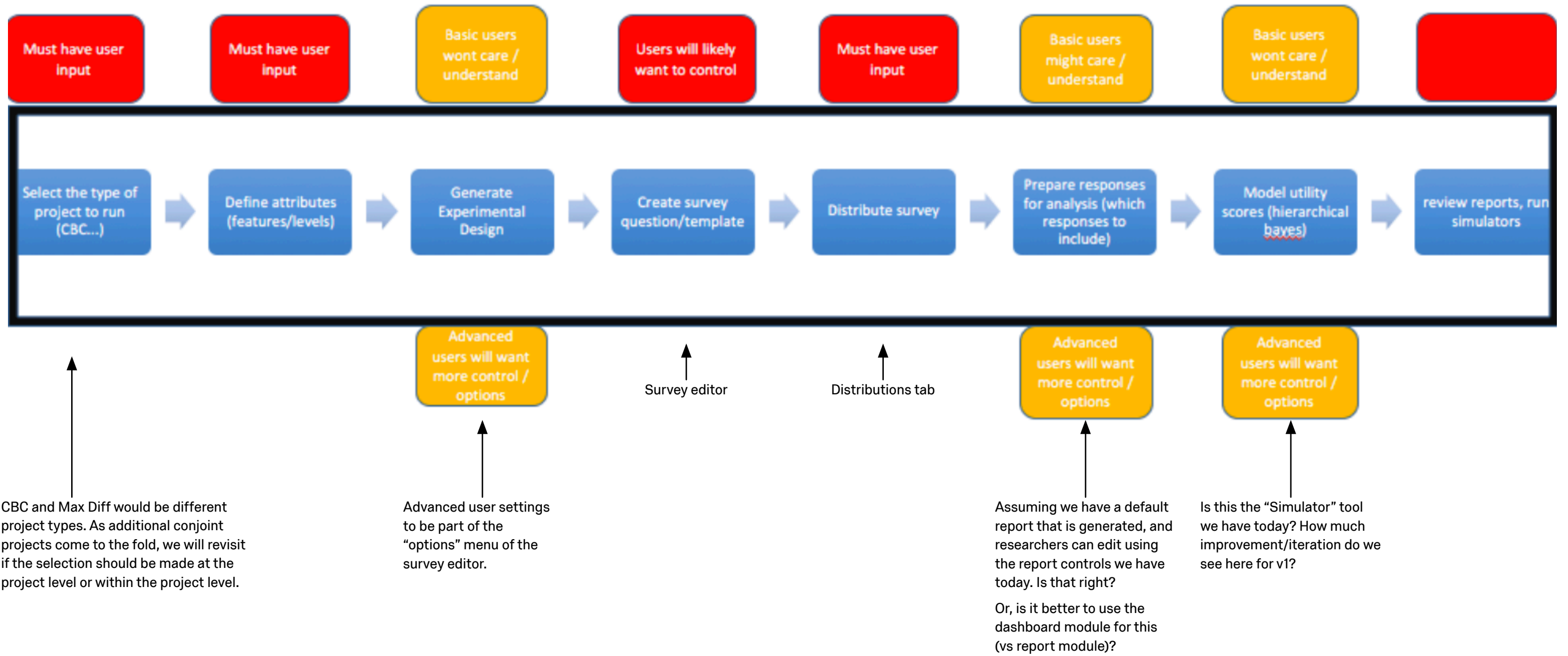
PX customers will be able to create Conjoint studies from the "Create Project" button on the Projects page.

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.

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.

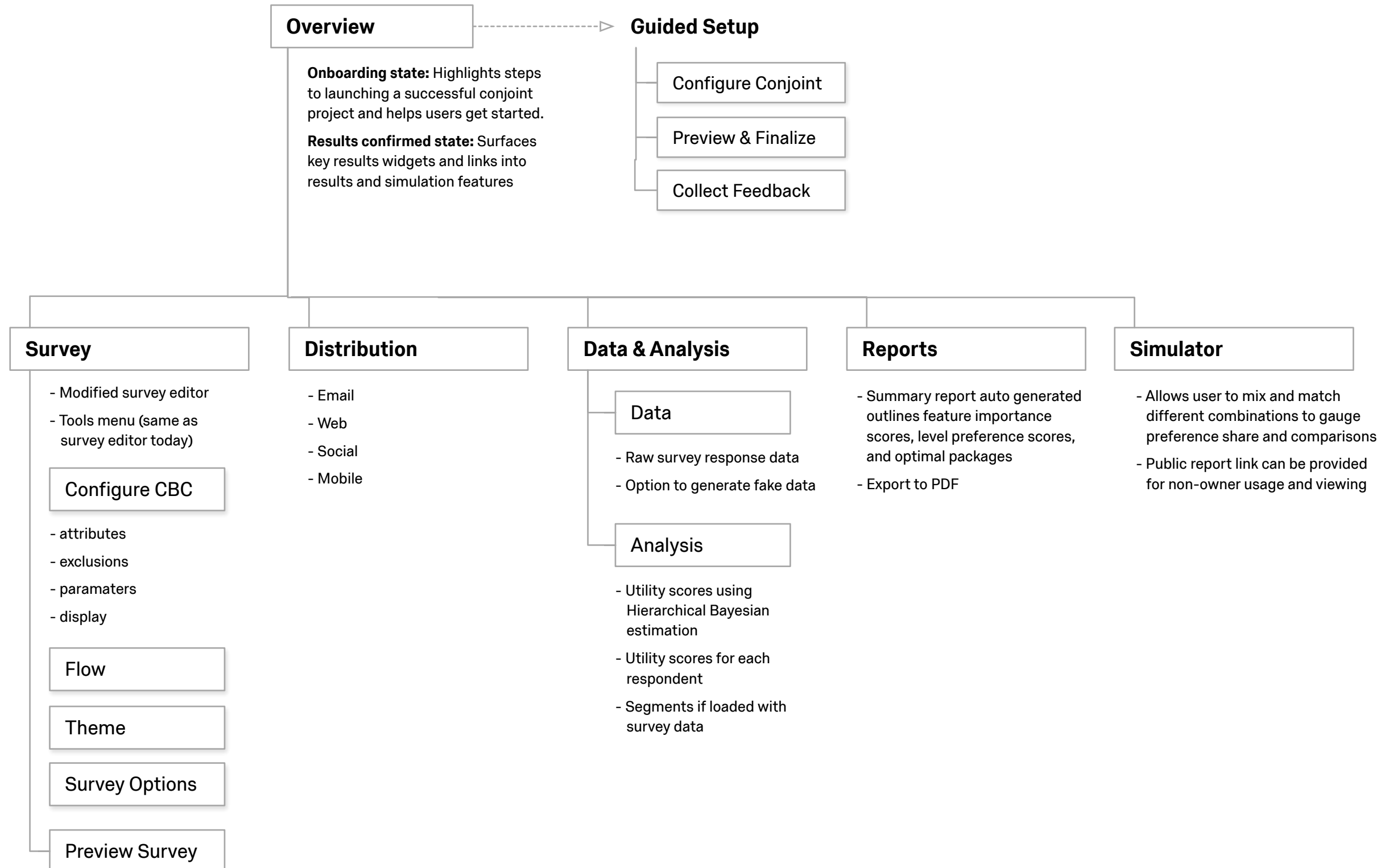


The Structure of a Conjoint Project (CBC)

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.

Benefits Packaging 2018

Overview Survey Distributions Data Reports Simulator

Your Conjoint Project at a Glance

Step 1: Configure Conjoint
1 The very first step to launching your conjoint project is to define attributes by identifying features (e.g., price) and levels (e.g., \$50, \$100, \$150).
[Define Attributes](#)

Step 2: Finalize survey
Use the survey editor to add questions, modify the look and feel, and customize advanced options as needed to polish a top notch survey before distributing.

Step 3: Collect feedback
When your survey is ready to go, head to the distributions tab to start collecting feedback. As feedback begins to roll in, results will populate in the Data tab.

Step 4: Review Results
Once you have collected enough information, clean up and confirm the results, then dig into your analysis and reports!

Project Resources

- > [Learn about the conjoint research methodology](#)
- > [View example conjoint studies](#)
- > [Get step-by-step help on our support site](#)

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".

The screenshot displays the 'Configure Conjoint' interface. At the top left, there is a logo consisting of four colored dots (green, blue, purple, teal). Below the logo, the text reads 'STEP 1: CONFIGURE CONJOINT'. The main heading is 'What are the attributes you wish to evaluate?'. Below this, a sub-heading states: 'Define 3-7 features (e.g., Price) each with 2-6 levels (e.g., \$10, \$5, \$1). Survey participants will see various combinations of these features levels and asked to select their preferred option.'

The interface is divided into three main sections for feature configuration, each with a numbered indicator (1, 2, 3) in a red circle:

- Feature 1:** The attribute is 'Price'. It has three levels: Level 1 is '\$10', Level 2 is '\$5', and Level 3 (optional) is '\$1'. There is a '+ Add Level' link below the levels.
- Feature 2:** The attribute is 'Quality'. It has three levels: Level 1 is 'Excellent', Level 2 is 'Fair', and Level 3 (optional) is 'Poor'. There is a '+ Add Level' link below the levels.
- Feature 3:** The attribute is 'Taste'. It has three levels: Level 1 is 'Salty', Level 2 is 'Sweet', and Level 3 (optional) is 'Savory'. There is a '+ Add Level' link below the levels.

At the bottom of the feature configuration area, there is a button labeled 'New Feature Group'. Below this, there are two navigation buttons: 'Back' and 'Continue'.

On the right side of the interface, there is a 'PRO TIP' box with a red circle containing the number '2'. The tip text reads: 'Once features and levels have been defined, customize advanced settings in the [Survey Editor](#) →'. Below this, it says: 'Define exclusions and customize survey design parameters such as number of questions per survey, answers per question, and total number of 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](#)



STEP 2: Preview & Finalize

How do you want to present your conjoint questions?

Edit your question and label text, confirm display, and preview below.

1 **Question text:**

Label Text:

Display: Card view (recommended for mobile) Table view

[Update Preview](#)

Select the option below that is most appealing to you.

Option 1

PTO	10 days
401K Matching	25% matching
Healthcare	100% premium
Free Lunch	Everyday
Work f/home	Yes
Sabbatical	After 5 years

Option 2

PTO	15 days
401K Matching	50% matching
Healthcare	50% premium
Free Lunch	M-W-F
Work f/home	No
Sabbatical	After 10 years

[Back](#) [Continue](#)

PRO TIP

Customize a more robust survey with the [Survey Editor](#) →

Add questions, modify your survey theme, configure advanced conjoint settings, apply survey logic and more.

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.

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](#)

The screenshot shows a user interface for collecting survey responses. At the top left is a logo with four colored dots (green, blue, purple, cyan). Below it, the text reads "STEP 3: Collect Feedback". The main heading says "Based on the features and levels defined, we recommend that you collect **325 responses**." Below this is the instruction "Share an anonymous survey and start collecting responses." A red circle with the number "1" is positioned to the left of a grey box containing a URL: "https://brand.qualtrics.com/jfe/form/SV_eap7xlbmqb8ffa". To the right of the URL is a "Copy link" button. Below the URL box is a "Customize URL" button. At the bottom left of the main content area is a "Back" link, and at the bottom right is a blue "Done!" button. On the right side of the interface is a sidebar with a close button (X) at the top. The sidebar contains a "PRO TIP" section with the text: "View all distribution methods from email to panels in [Distributions](#) →" and "Email your contact lists, send via SMS, generate a QR cod, purchase respondents and more in Distributions."

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).

Benefits Packaging 2018

Overview Survey Distributions Data Reports Simulator

Your Conjoint Project at a Glance

- Step 1: Configure Conjoint**
Edit attributes, define exclusions, and customize your conjoint configurations to ensure the survey experience any time in the [Survey Editor](#) →
- Step 2: Finalize survey**
Add questions, modify the look and feel, and customize advanced options as needed to polish a top notch survey with the [Survey Editor](#) →
- Step 3: Collect feedback**
Distribute and redistribute your survey via email, personal links, SMS, social media, QR code and more with [Distributions](#) →
- Step 4: Review Results** 1
As feedback begins to roll in, results will populate in the [Data](#) tab and your reports will begin to populate. We recommend holding off on digging in too deep until you reach the recommended responses. In the meantime, get a sense of what to expect using test data to see [Reports](#) and [Simulations](#).

0 of 325 recommended responses collected

Project Resources

- > [Learn about the conjoint research methodology](#)
- > [View example conjoint studies](#)
- > [Get step-by-step help on our support site](#)

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).

The conjoint questions block have been configured to bla, bla, bla, something about logic and locking down to maintain accurate reporting and analysis bla, bla. Message to use the Conjoint Options menu or click to edit Conjoint Settings to manage settings.

Conjoint Questions

2. Conjoint Options

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

Block Options ▾

- View Block...
- Collapse Questions...
- Lock Block...
- Question Randomization...
- Loop & Merge...
- Next/Previous Button Text...
- ▲ Move Block Up...
- ▼ Move Block Down...
- Add Block Below
- Copy Block...
- Copy Block To Library...
- Copy Questions To Library...
- Delete Block...

Conjoint Options ▾

- Modify Features & Levels...
- Define Exclusions...
- Configure Parameters...
- Modify Display...
- Upload Survey Design...
- Preview Block...
- Collapse Questions...
- Next/Previous Button Text...
- Move Block Up...
- Move Block Down...
- Add Block Below

Benefits Packaging 2018 ▾

Overview
Survey
Distributions
Data
Reports
Simulator

Setup
Look & Feel
Survey Flow
Survey Options
Tools
Preview

Benefits Packaging 2018 Survey

Conjoint Questions
Conjoint Options ▾

CBC Select the option below that is most appealing to you.

Option 1

PTO	10 days
401K Matching	25% matching
Healthcare	100% premium
Free Lunch	Everyday
Work f/home	Yes
Sabbatical	After 5 years

Option 2

PTO	15 days
401K Matching	50% matching
Healthcare	50% premium
Free Lunch	M-W-F
Work f/home	No
Sabbatical	After 10 years

Edit Conjoint Settings

[Add Block](#)

Additional Questions
Block Options ▾

Q1 Click to write the text question text

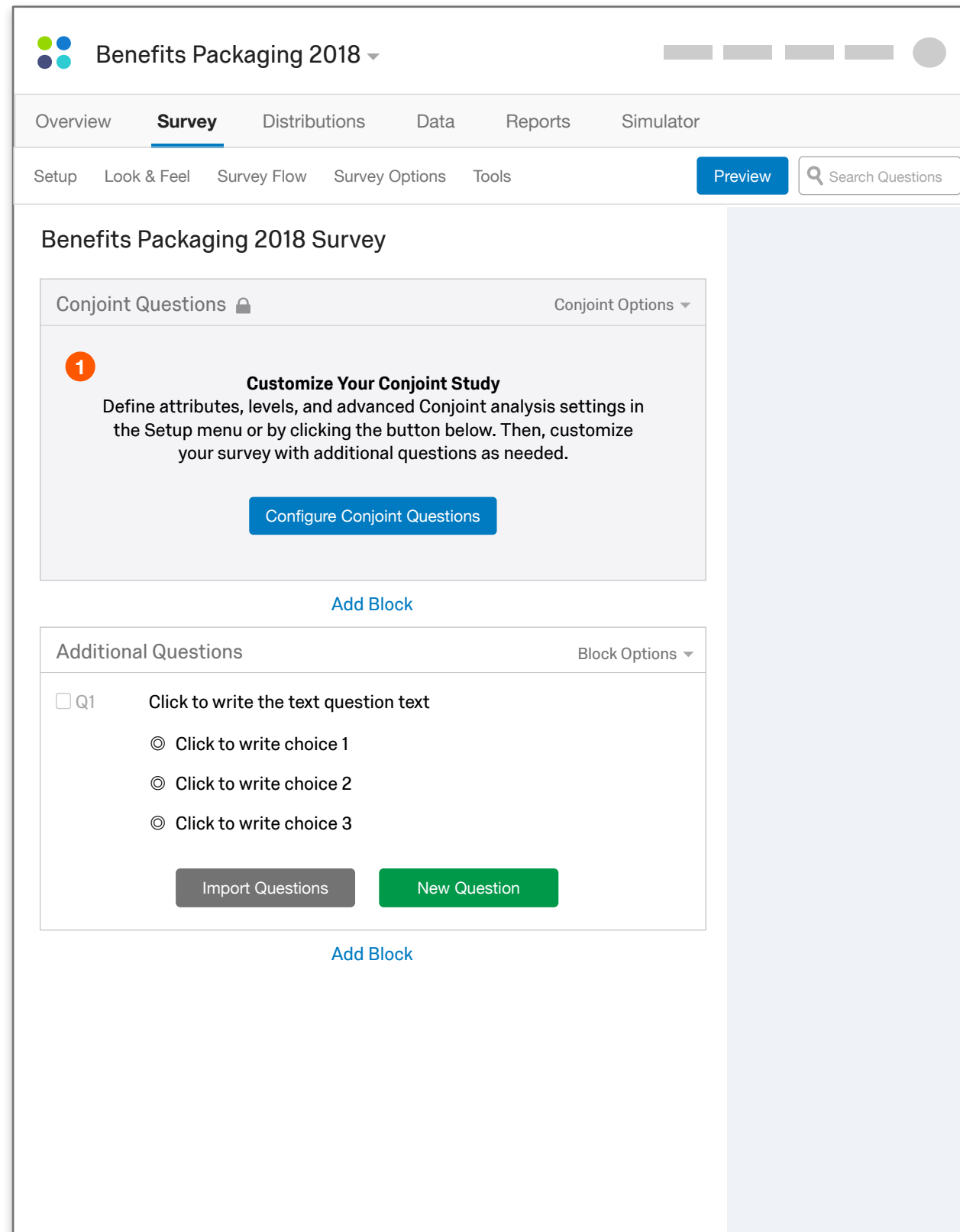
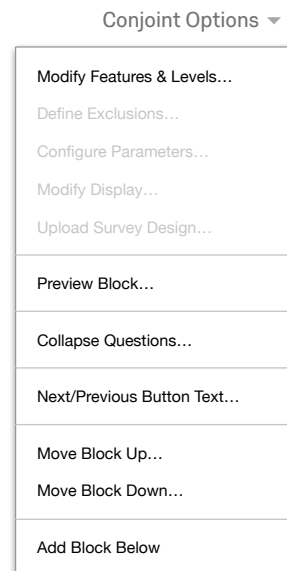
- Click to write choice 1
- Click to write choice 2
- Click to write choice 3

Import Questions
New Question

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:



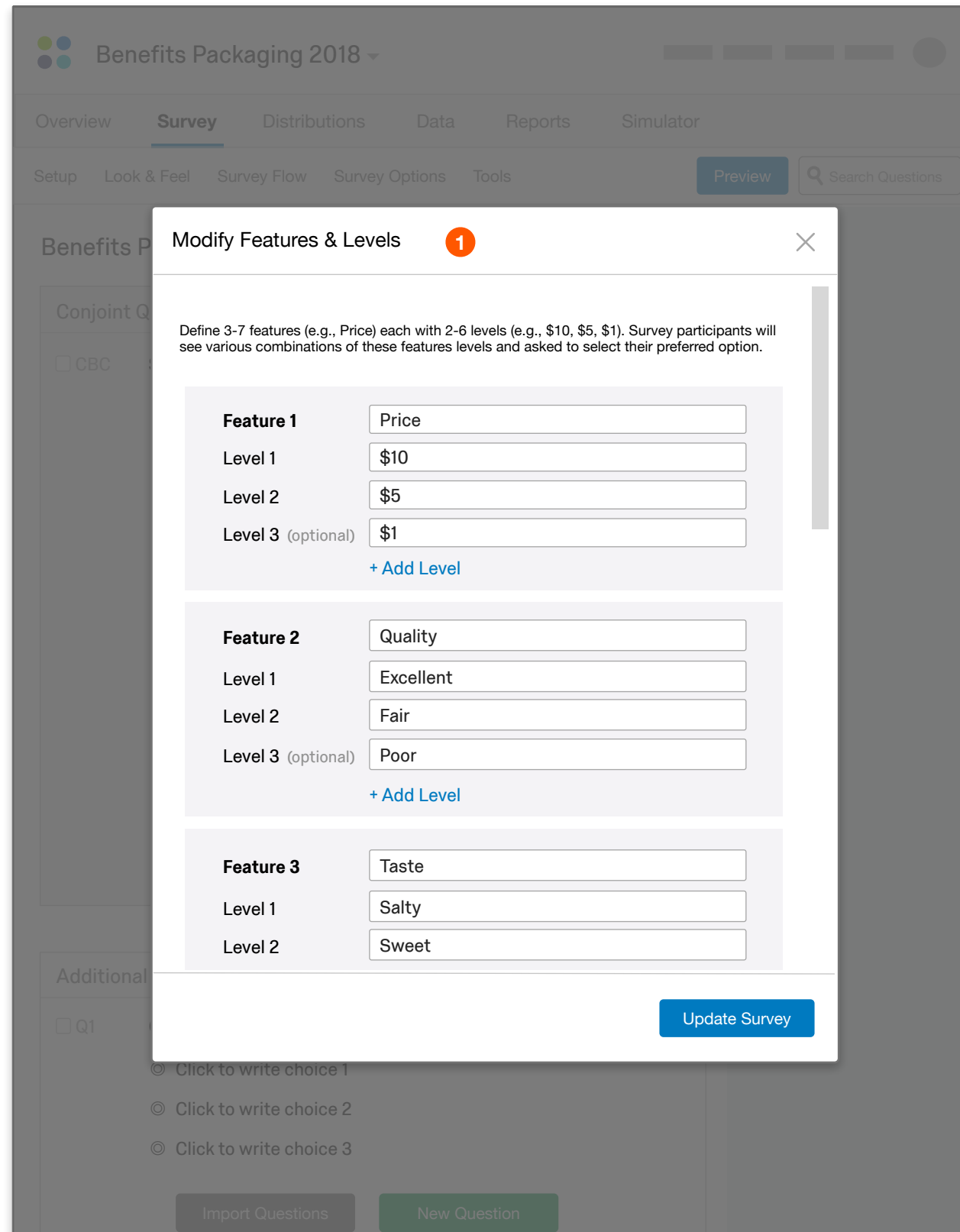
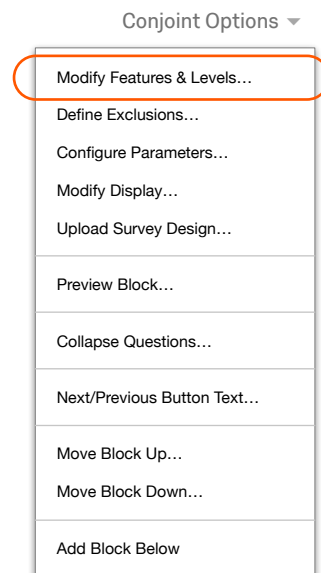
Advanced: Modify Attributes

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

- Conjoint Options ▾
 - Modify Features & Levels...
 - Define Exclusions...
 - Configure Parameters...
 - Modify Display...
 - Upload Survey Design...
- Preview Block...
- Collapse Questions...
- Next/Previous Button Text...
- Move Block Up...
- Move Block Down...
- Add Block Below

The screenshot shows a software interface for 'Benefits Packaging 2018'. At the top, there are navigation tabs: Overview, Survey (selected), Distributions, Data, Reports, and Simulator. Below these are sub-tabs: Setup, Look & Feel, Survey Flow, Survey Options, and Tools. A 'Preview' button and a search bar for 'Search Questions' are also visible. The main content area is partially obscured by a 'Define Exclusions' dialog box. The dialog box has a title bar with a close button (X) and contains the following text: 'Define feature level combinations to exclude. These combinations will not appear as options shown to survey participants.' Below this text is a section titled 'Exclude the Following Combinations' which contains two rows of dropdown menus. Each row has a 'Select Feature' dropdown, a 'Select Level' dropdown, and a small 'x' icon to the right. Below the dropdowns is a blue link that says '+ Add exclusion to this group'. At the bottom of the dialog box is a button labeled 'New Exclusion Group'. In the background, behind the dialog, there is a 'Conjoint Q' section with a 'CBC' checkbox. Below that is an 'Add Block' button. At the bottom of the interface, there is an 'Additional Questions' section with a 'Block Options' dropdown and a list of question types: 'Q1' (text question), 'Click to write choice 1', 'Click to write choice 2', and 'Click to write choice 3'. At the very bottom, there are 'Import Questions' and 'New Question' buttons.

Advanced: Configure Parameters

- Conjoint Options ▾
- Modify Features & Levels...
 - Define Exclusions...
 - Configure Parameters...**
 - Modify Display...
 - Upload Survey Design...
 - Preview Block...
 - Collapse Questions...
 - Next/Previous Button Text...
 - Move Block Up...
 - Move Block Down...
 - Add Block Below

The screenshot shows a software interface for 'Benefits Packaging 2018'. A 'Configure Parameters' dialog box is open, providing instructions and settings for a conjoint survey. The dialog includes a title bar with a close button, a descriptive paragraph, and three input fields with recommended values. A blue 'Update Survey' button is at the bottom right. The background shows a navigation menu with 'Survey' selected, and a table of attributes like 'Work f/home' and 'Sabbatical'.

Benefits Packaging 2018 ▾

Overview **Survey** Distributions Data Reports Simulator

Setup Look & Feel Survey Flow Survey Options Tools Preview Search Questions

Configure Parameters

Respondents should see various combinations or feature bundles, and are asked to pick a preferred option several times to inform a proper analysis. We have provided some defaults to the following parameters.

Total number of combinations generated:	<input type="text" value="50"/>	10-100 recommended
Number of combinations a participant sees:	<input type="text" value="8"/>	8-10 recommended
Choices or combination options per question:	<input type="text" value="2"/>	2-4 recommended

325 respondents are recommended for this project based on the number of attributes, combinations generated, and number of options shown to each respondent.

[Update Survey](#)

Work f/home	No
Sabbatical	After 10 years

[Edit Conjoint Settings](#)

[Add Block](#)

Additional Questions Block Options ▾

Q1 Click to write the text question text

- Click to write choice 1
- Click to write choice 2
- Click to write choice 3

[Import Questions](#) [New Question](#)

Advanced: Modify Display

- Conjoint Options ▾
 - Modify Features & Levels...
 - Define Exclusions...
 - Configure Parameters...
 - Modify Display...**
 - Upload Survey Design...
 - Preview Block...
 - Collapse Questions...
 - Next/Previous Button Text...
 - Move Block Up...
 - Move Block Down...
 - Add Block Below

The screenshot shows a software interface for 'Benefits Packaging 2018'. A 'Modify Display' dialog box is open, allowing users to edit question details. The dialog includes fields for 'Question text', 'Label Text', and 'Display' options. The 'Display' options are 'Card view (recommended for mobile)' and 'Table view'. A blue 'Update Survey' button is located at the bottom right of the dialog. The background interface shows a navigation menu with 'Survey' selected, and a table of benefits options.

Work f/home	No
Sabbatical	After 10 years

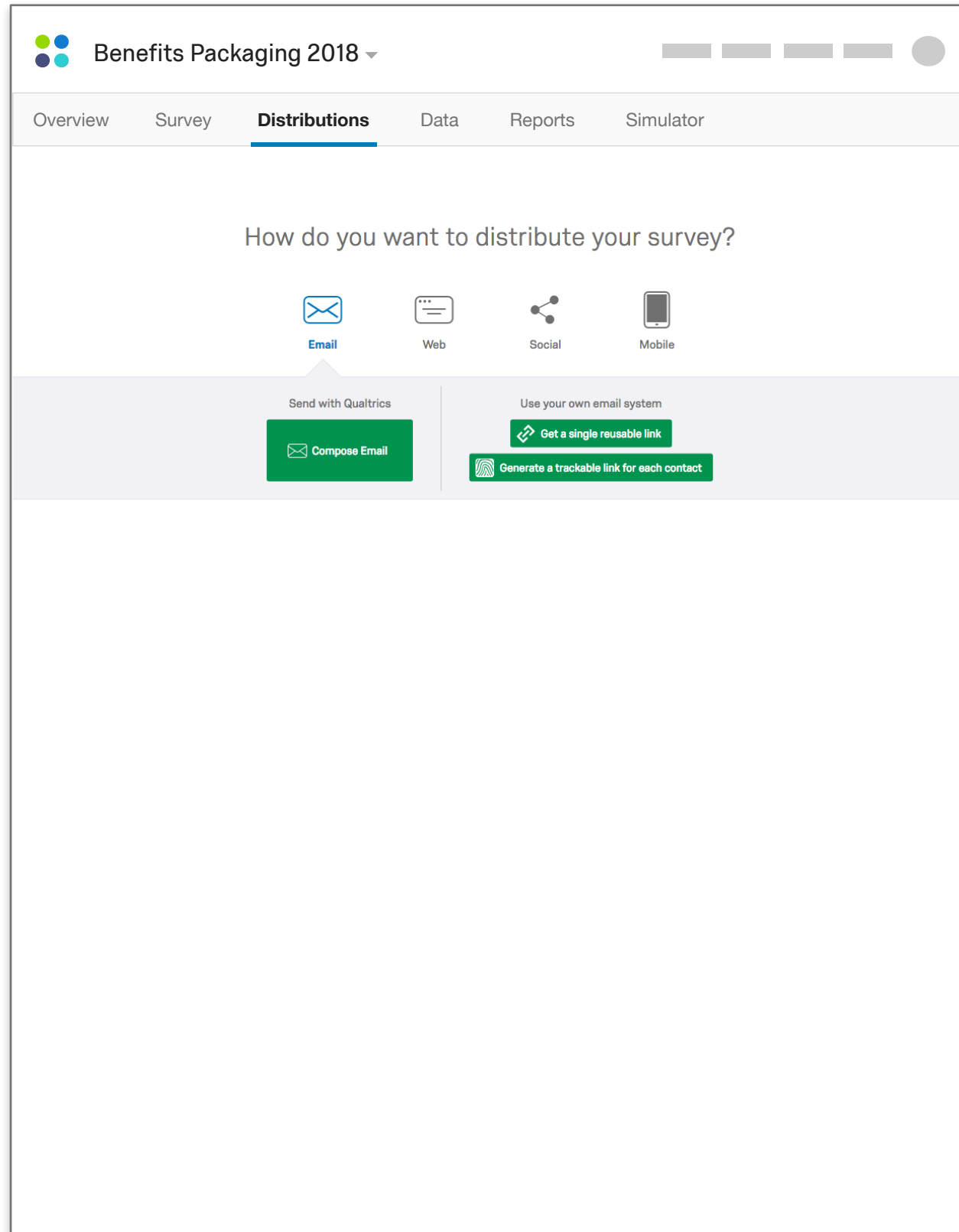
Additional Questions

- Q1 Click to write the text question text
 - Click to write choice 1
 - Click to write choice 2
 - Click to write choice 3

Distributions

1. Distributions tab, BAU

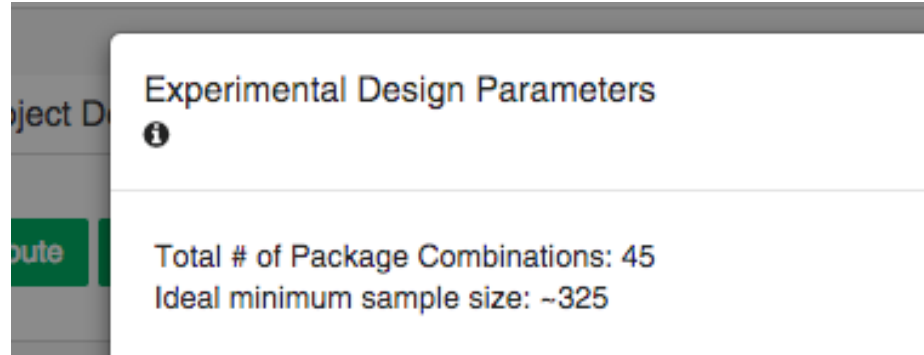
The distributions tab should be able to use the same modules as used in a basic survey project today.



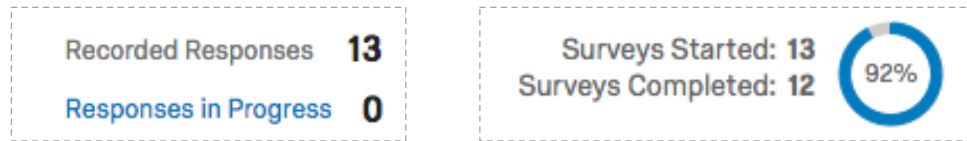
Data

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:



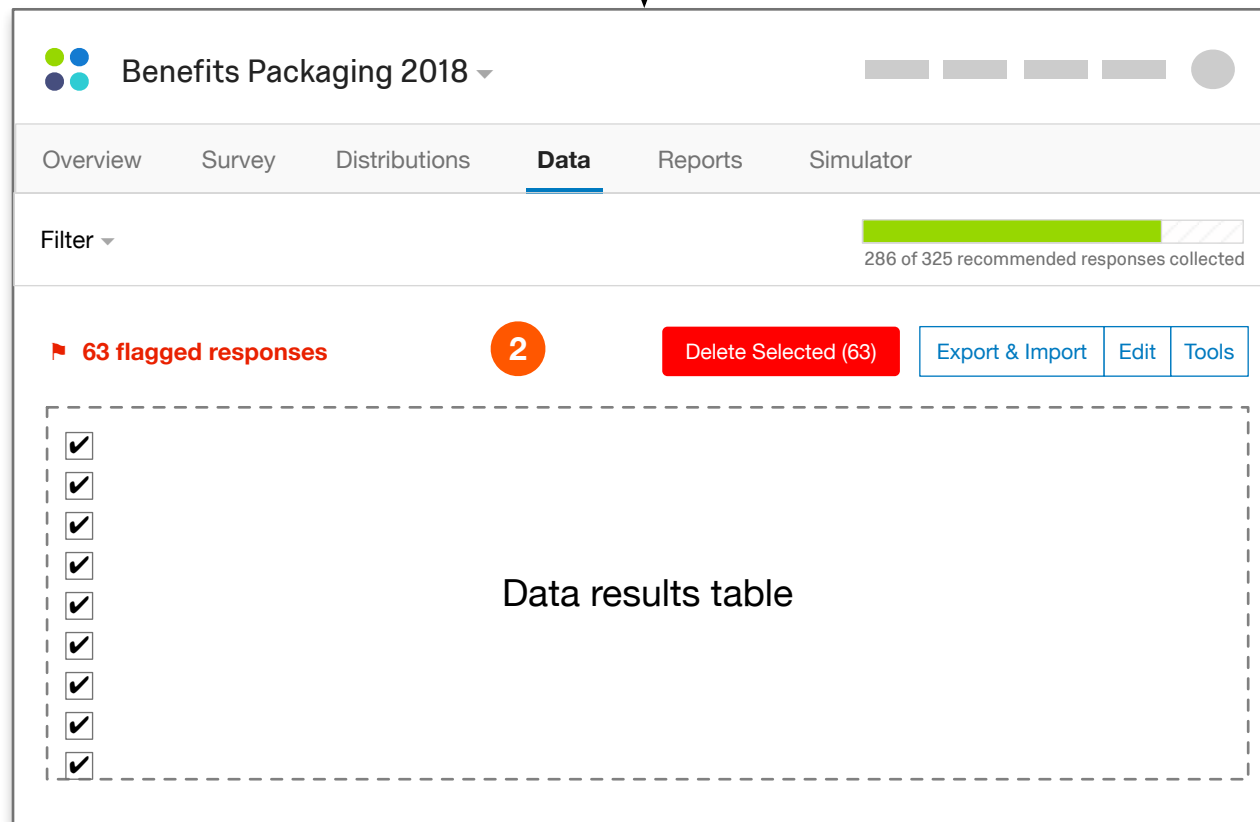
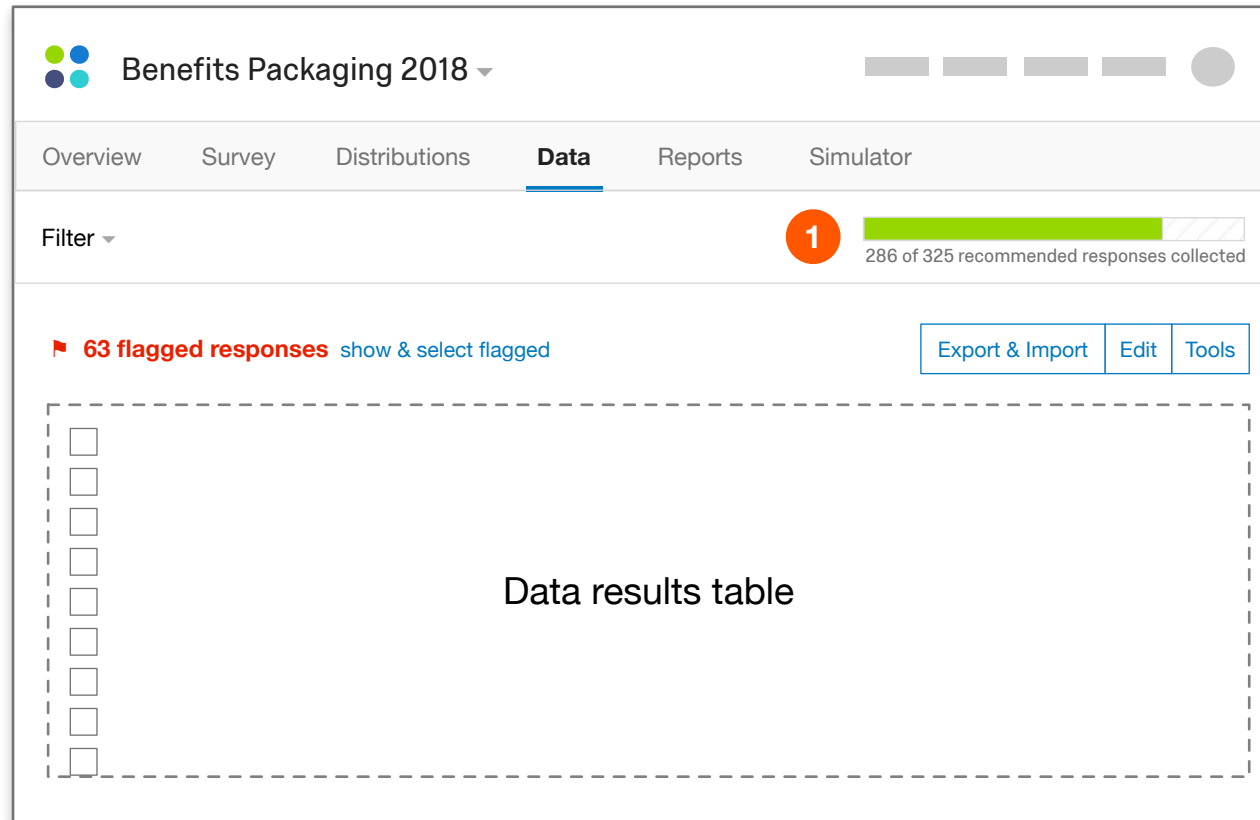
This area of the Data tab is already used to show a breakdown of responses (left is from the Data tab; right is from the Cross Tabs):



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, smoochy 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:

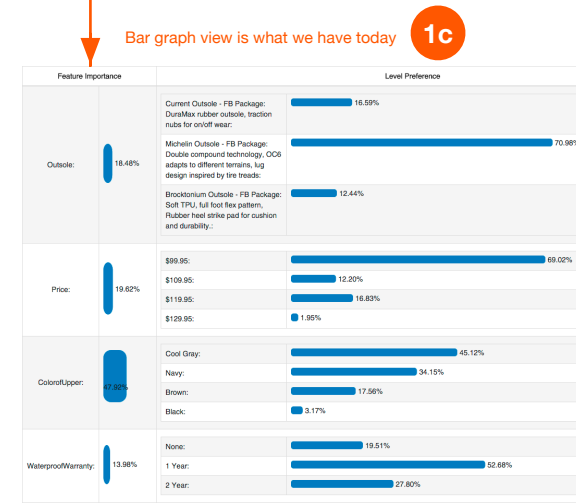
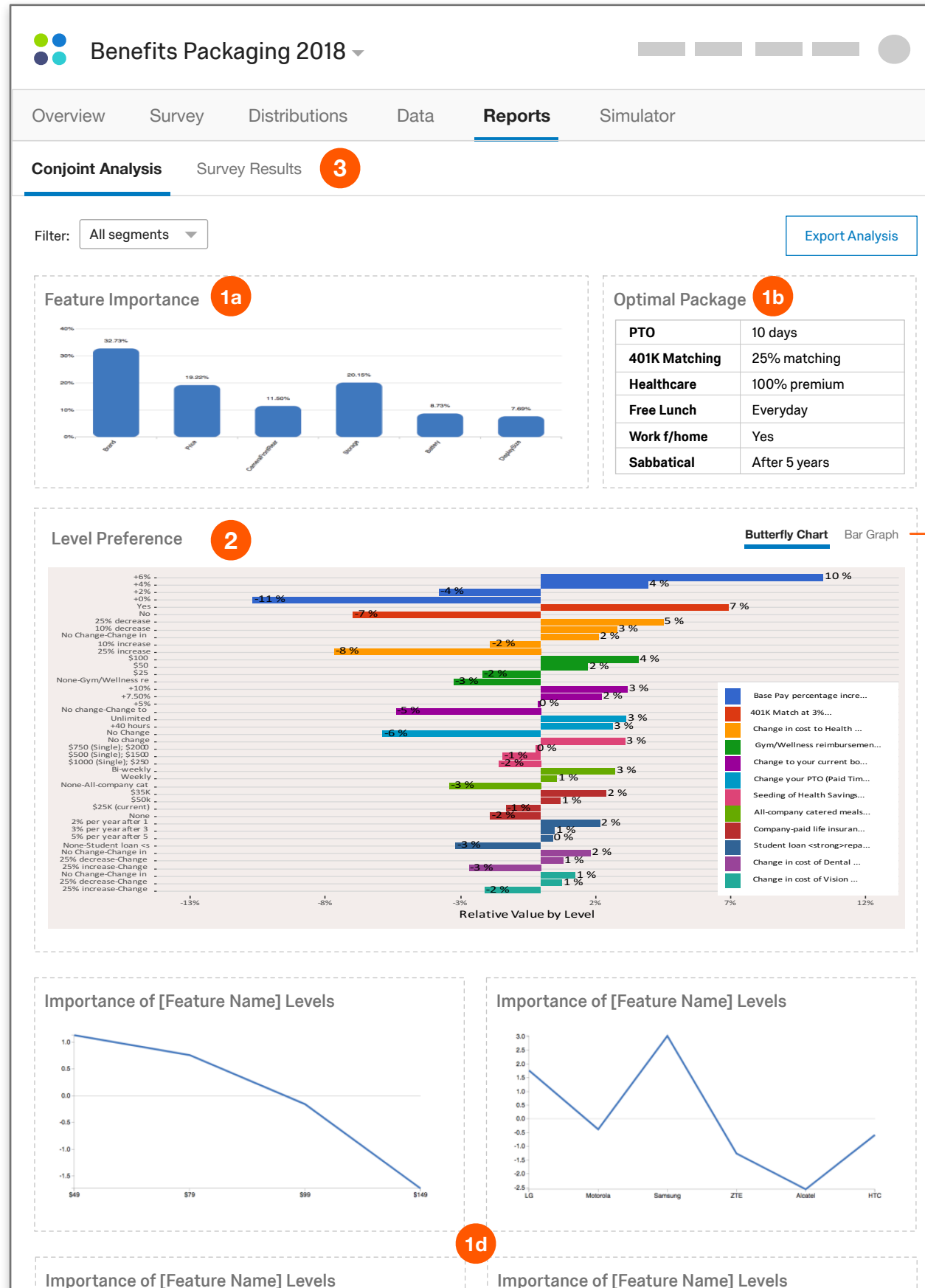
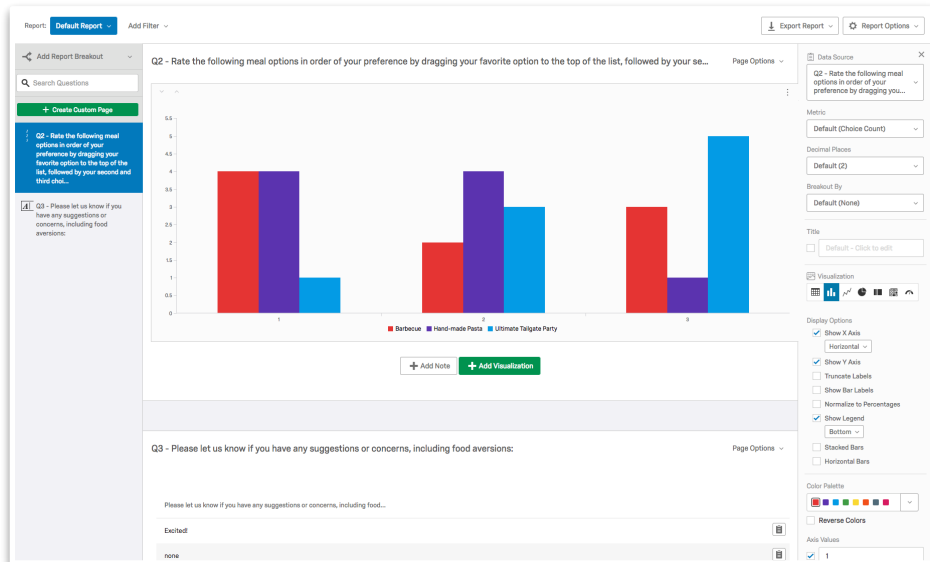
- Feature importance distribution by utility score
- Optimal package
- Breakdown of feature importance and level preference
- Feature importance line chart

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:



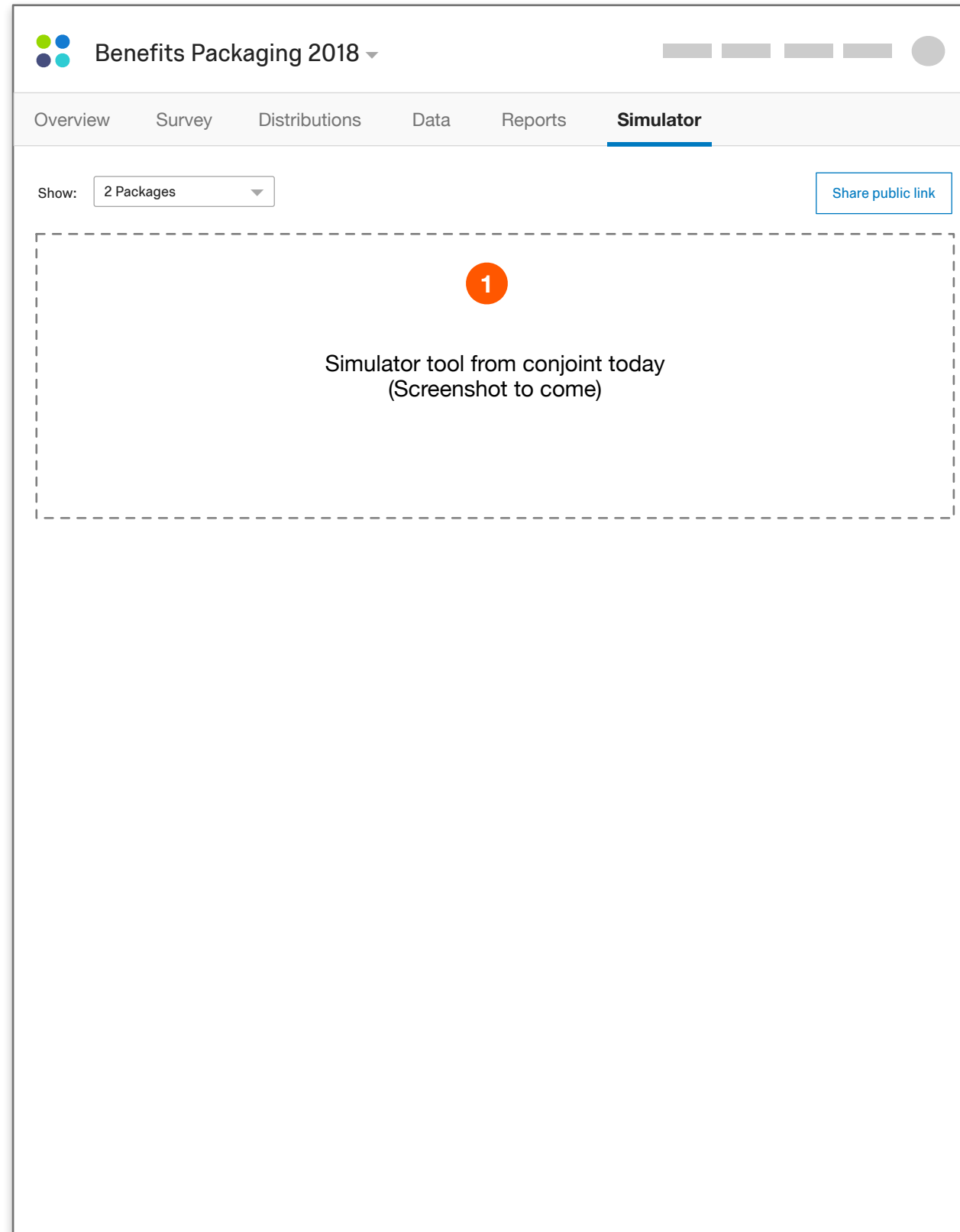
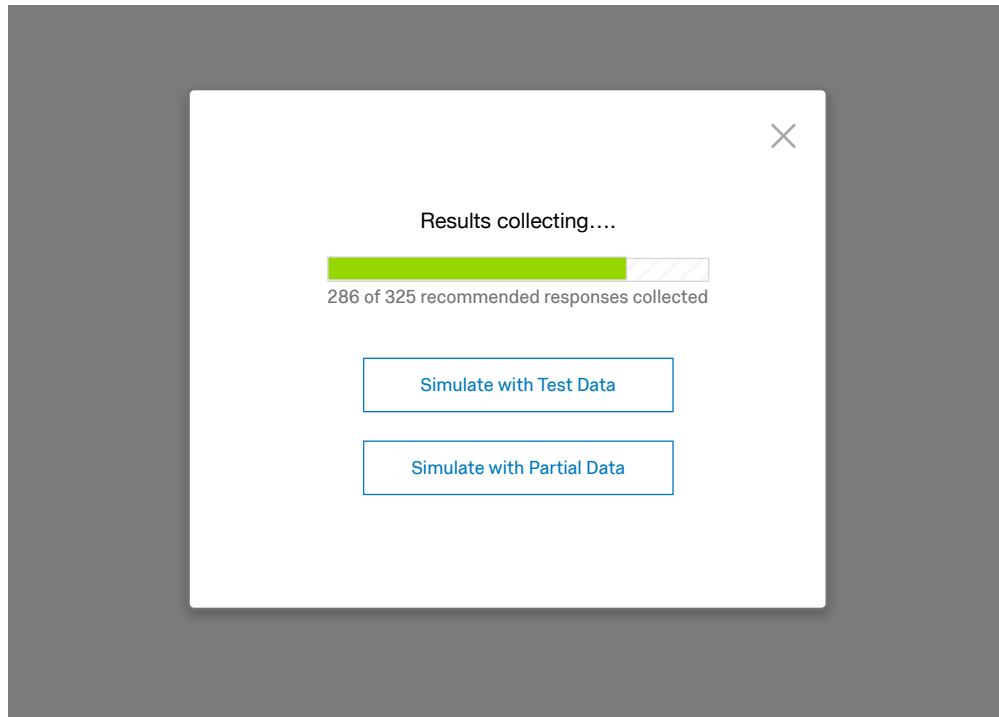
Simulator

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 they 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.

The screenshot shows a web application interface for "Benefits Packaging 2018". The top navigation bar includes "Overview", "Survey", "Distributions", "Data", "Reports", and "Simulator" (which is the active tab). Below the navigation bar, there is a prompt: "Compare packages against yourself or competitors. Ready to run your own conjoint study? [Launch Guided Setup](#) →".

Below the prompt, there is a "Show:" label followed by a dropdown menu set to "2 Packages" and a "Share public link" button. The main content area is enclosed in a dashed border and contains a large orange circle with the number "1" inside. Below the circle, the text reads: "Simulator tool – Demo mode (Screenshot to come)".

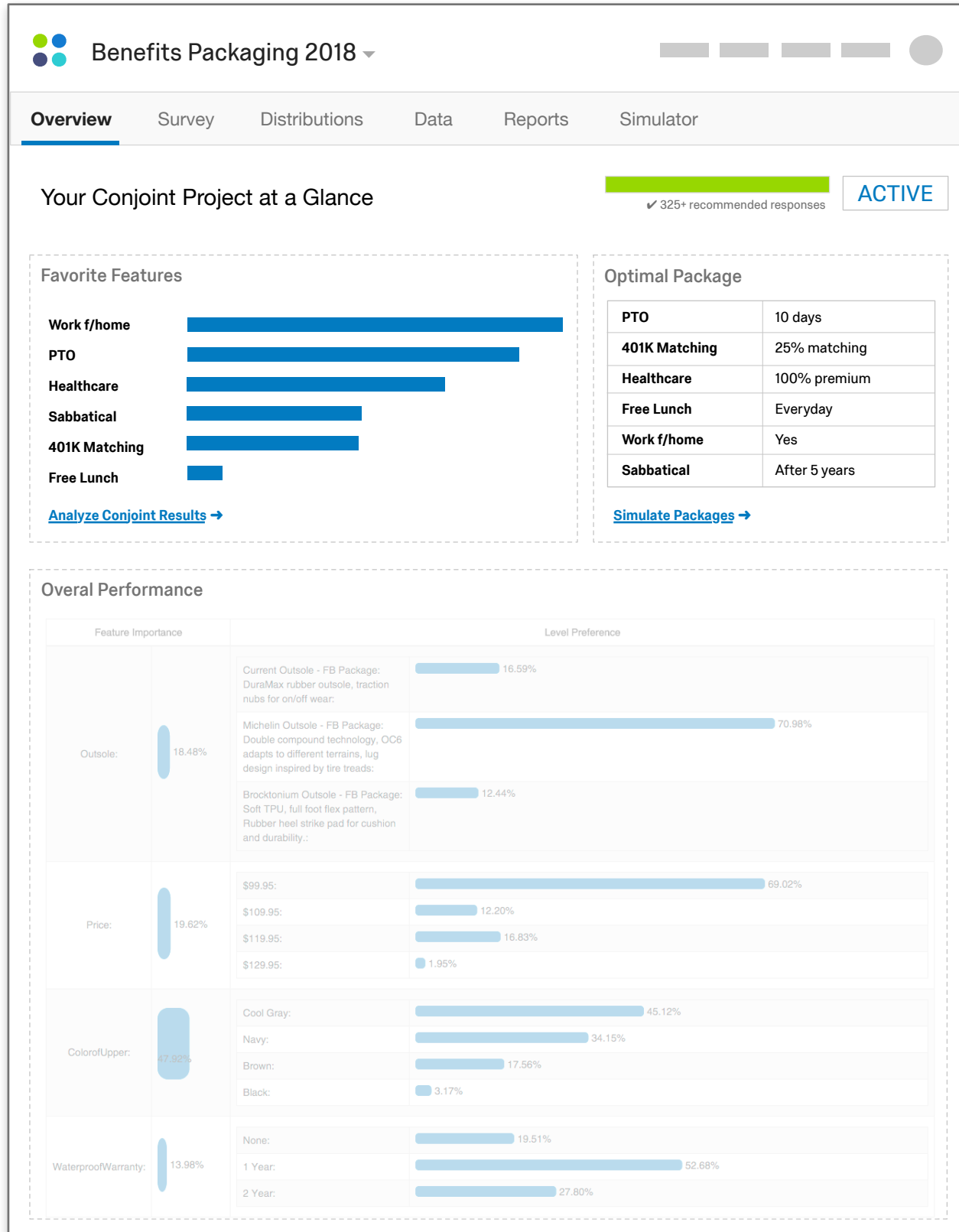
Overview (Analysis)

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).



Get Started with CBC Flow (DRAFT)

