

# Baseline Research Plan

## Case Log Search & Filtering

### Problem/Opportunity

With the current implementation of case log, it's difficult for sellers to track all of their issues efficiently within the log. The goal of this project is to improve search and filtering capabilities for the new implementation of case log within Meld to allow sellers to quickly filter and search for specific cases as needed. Seller interviews will allow us to understand how users currently navigate the case log, pain points in their experience, common use cases for search and filtering features, and prevalent concerns relating to the support experience. Based on the learnings and insights from this research, we will begin brainstorming methods of integrating search and filtering into the Meld case log redesign and develop lo-fidelity prototypes for future testing.

- **Search**
  - Determine the best way to display search results within the log so Sellers choose the right one
  - Enhance keywords search within body of cases, since it currently only looks at titles
- **Filtering**
  - Bulk Cases: Multiple identifiers, Must display each identifier with diff stages of processing in a structured way
  - Single Cases: Multiple cases for one ASIN, Provide way to see cases for one identifier and where each case is
  - Marketplace: Add filtering capabilities by marketplace
  - Current Case Log: Incorporate the existing filters on type of cases/ requests, date, and status of case



### Learning goals

Goal	Method
Learn about sellers' primary reasons for accessing the case log.	Observation, Verbal
Learn how sellers currently navigate the case log page and pain points in their experience. (Understand what features of the case log they use most frequently and why)	Observation, Verbal
Observe what attributes seller's prevalently use to look through their cases. Which filters are being used most commonly? What key terms are seller's typing when using the search bar? How often are the top nav menu tabs being switched between?	Observation, Verbal
Learn what elements of the case log are the most valuable to users and what is unnecessary or could be added (especially regarding short descriptions, search, filters, marketplace)	Observation, Verbal
Learn what issues sellers have encountered in the past with case log and their feedback or concerns with the existing support experience.	Observation, Verbal

### Key Tasks/Scenarios

Participants will interact with their Seller Central case log page.

1. Seller begins at the Help Hub landing page-
2. Seller clicks "Help" and tries to navigate to the case log (observe their experience and note it's efficiency)-
3. Seller interacts with the case log page. Tries to create a new case and then access the case log (observe their pain points)

1. Sellers are asked about their primary reasons for accessing the case log and their common use cases for searching and filtering within the log. They are also asked about their prior experience/ familiarity with the case log.
2. Sellers are asked questions about the case log list view including what they would like to see in the overview for each case.
3. Sellers are asked about the usefulness of the short descriptions for each case, and how frequently they write their own content.
4. Sellers are asked if they have dealt with multiple cases from different marketplaces before and how they would prefer that information be separated/ displayed.
5. Sellers are asked to try to interact with the search feature in the case log. Type in typical phrases they would conventionally use to look through their own cases. (observe what keywords seller uses)
6. Seller attempts to filter through the cases using the filter attributes they find the most helpful (i.e. type of cases/ requests, date, and status of case)
7. Sellers are asked about what filters they typically use to sort through their cases— what filters they would want to see, and what filters they don't anticipate using.
8. Sellers interact with the menu bar ("All", "Your cases/requests", "Needing Attention", "Filter All"). (observe how often tabs are being switched versus the filter option)
9. Sellers are asked questions about the detailed view of opening up a case.
10. ~~Sellers compare this separated case log experience to the Mold integrated vertical case log format and answer questions regarding their expectations about where information should be displayed.~~

## Methodology

- Moderated, 30 minutes study sessions
- 6 participants who sell on Amazon
- Participants will be recruited and scheduled via [usertesting.com](https://www.usertesting.com) and conducted via Zoom

## Stimuli

Participants will interact with the existing Seller Central case log within the Support experience. A facilitator will show the website via screen sharing and ask them questions.

## Recruiting

Total of 6 participants recruited through [usertesting.com](https://www.usertesting.com)

## Timing

Activity	Date(s)
Finalize research plan	Week 2
Recruit/schedule participants	Week 2
Conduct research activity	Week 3
Begin analyzing research findings	Week 3
Finish research report	Week 4
Present to project stakeholders	Week 4

## Participant interview schedule

#	Participant ID	Location	Markets	Company size	Date	Time (PST)	Recordings
1	-----	US	US	< 10k	6/7/2022	10:30 am	
2	-----	CA	CA	2 - 10	6/7/2022	4:30 pm	
3	-----	UK	UK	< 10k	6/8/2022	3:00 pm	
4	-----	FR	FR	< 10k	6/8/2022	4:00 pm	
5	-----	US	US	-	6/9/2022	9:00 am	
6	-----	US	US	1	6/9/2022	10:00 am	

## Related links/documents

Figma File: <https://www.figma.com/file/QkUp1kwVKvflzzRoJKjR9y/Intern-project---Simplified-search-and-filtering-in-Case-log?node-id=518%3A435>

## Study scripts

### Introduction

Thank you for taking the time to talk to us today. My name is \_\_\_, I'm a UX designer on the Amazon Seller Support design team.

Today I'd like to learn about your current experience with seeking support from the Seller Central website. For your information, this session is being recorded and some of my colleagues might join later to observe and they may have a couple of follow up questions as well.

### Warm-up questions

- What products do you sell?
- How long have you been selling on Amazon?

### Intro questions

- Have you encountered any issues with selling on Amazon before and created a case?
  - If so, how would you describe your experience creating and managing cases within the case log?
- What are usually your primary reasons for accessing the case log?
  - What are some of the issues you contact help for?
- How frequently do you access the case log to monitor the status and progress of your cases?

### Case Log Walk Through

Let's move on to looking at the current Seller Central case log. Could you login to your Seller account and share your screen with us?

### [Current Case Log Page]

#### [Case Log List View]

1. ~~What overview information regarding a case do you think is critical to be displayed within each case row? (i.e. title, case number)~~ Out of all of these columns that are displayed (short description, ASIN, etc) which do you find the most helpful? Would you want to see any additional columns with more information?
2. Within each case row, there is a short description regarding the case. Do you typically change the auto-generated text in this description? (Do you write these descriptions yourself?)
3. How often do you find these descriptions helpful, especially when searching or looking through your cases?

#### [Search & Filtering Features]

1. Assume you filed multiple cases regarding issues you were having with different products and are trying to find a specific case. How would you try to look through your case log?
  - a. See if the seller interacts with the search feature in the case log or goes to the filter
2. If you are searching for a specific case, what keywords or phrases would you typically use to try to identify the case? (i.e. ASIN, product name, date case created, title, case description, shipment ID, or others)
3. If you are trying to filter through your cases, which filter attributes would you find the most helpful/ essential? (i.e. type of cases/ requests, date, and status of case) Why?
  - a. Do you find filtering by ASIN to be useful?
4. What other filters, besides those that are shown, would you find helpful for sorting through your cases and why?
5. Are there any filters you find not helpful/ don't anticipate ever needing?
6. How often would you interact with the menu bar ("All", "Your cases/requests", "Needing Attention", "Filter All") when looking for a case?
  - a. Observe if the menu bar options can just be incorporated as an aspect of the filters
7. Do you ever find it helpful to sort the rows in descending or ascending order with the little triangles?

#### [Marketplace Questions]

1. Do you sell on multiple marketplaces?
2. Do you ever want to create different cases specific to a marketplace?
3. What would you want to see in the case log regarding separation between different marketplaces?
4. Do you often switch to different languages depending on the marketplace?

#### [Case Log Detail View]

1. Are you ever interested in looking at closed cases versus open ones? What purpose? How frequently? What would you be looking for when viewing an open case?
2. Is there any other information would you like to see displayed here?
  - a. When clicking on a case, where would you anticipate more details about the case be displayed? (i.e. same page pop-up, left hand panel, different full page)

3. When you return to list view, are there any changes you would expect to see? Would you find it helpful to see some indication of viewed messages?
4. When an associate sends back a new response, how would you know you have a new case in your case log? Would you find it helpful to see some indication of new unread messages?
  - a. Follow-up (if they don't mention email): When you receive an email for a new response and check your case log, is this reply the first entry in your log—how would you search for this particular response within your log?

#### **Wrap-up questions**

- Do you have any other feedback or concerns regarding the existing support experience?
- If you can change one thing about the case log or support experience, what is it?
- I think we're just about done. Before we end our session, do you have any other questions or final comments about today's session?

#### **Research Sessions Responses Spreadsheet**

[Sheet1: Case Log Research Sessions Spreadsheet](#)