

CSSW usability study, December 2019

Methodology

- A) On December 11th and 12th, 2019, BRP UX conducted an Amazon lab study to gather feedback on the following CSSW related features and issues. See Appendix 1 for participant profiles.
 - a. **DOC upload**, Phase 3 (Dec 2019 release, including weblab treatments) – Customer must upload a supporting document (DOC upload, or DU), in addition to supplying their Name/Address/Phone (NAP), on an Amazon branded webpage to verify identity and reinstate their account (pending BRP verification). Prototype and production deployed design on both a lab-based PC and Android mobile device were viewed by participants for evaluation.
 - b. **ATO**, Phase 5 (Future) – Customer can identify fraudulent orders through a ‘suspicious activity’ page and, after completing NAP to ensure identity verification, submit to Amazon for review. Prototype designs on both a lab-based PC were viewed by participants for evaluation.
 - c. **CS contact (ongoing)** – A secondary goal of the study solicited feedback on customer service contact motivation and mitigation during in-task evaluation for both designs, a. DOC upload & b. ATO.
- B) The study used 1:1 in person observations, task completion success rate and reflection, and pre/post-interviews as the basis for findings and recommendations. The observations and interviews focused on discovery, comprehension, and evaluation.
- C) Participants completed an authentic NAP + DU experience using their personal mobile device and a lab supplied desktop PC with Amazon test accounts. 9 participants (see Appendix 1) were recruited by vendor Fieldwork that met eligible criteria (sourced from Core Retail usability professionals).
 - **Customer observations & task completion.** Observations are recorded as participants walk through the current experience and vocalize any unmet needs or confusion.
 - **Interviews.** Each session will kick off with a brief, structured interview and conversation about their current experience with the upload process and experience with Amazon customer service. A concluding interview will capture reflective sentiment on current and future customer needs. A SUS score was solicited for DU.

Usability themes

Issue	Usability severity rating (USR*)	How to improve	Scenario or Product
1. Contacting CS was the immediate reaction when presented with a scenario that is requesting the customer to self-serve a suspicious or fraud related activity (22 of 27 responses). (see Appendix 2)	3	Status: COMM. STARTED with Help team (Paul) a) Customer education (retail FAQs, improved email blurbs) b) More authentic trust mechanisms built into the interface such as improved branding (header/footer) c) Inline challenges. d) Highlight benefits of self-serving and/or how CS is not equipped to respond to the issue.	CS contact
2. NAP + DU: First impressions vocalized by participants viewing, not completing or submitting, NAP + DU echoed general CS contact feedback. 8 of 9 participants reported they would contact CS via phone channel (7 of 9).	3	See Issue #1	DU

3. Finding the ingress point to start the ATO workflow was difficult or undiscovered with the single hyperlink design	3	Engage YO team(s) to understand contextual, order-based integration	ATO
4. NAP + DU: Exploring the secondary details UI ('Details', 'Why?' popovers) helped comprehension and improved trust. However, only 4 of 9 participants initially exposed the auxiliary content.	2	Status: SIM CREATED Current popover design aligns with HIG standards ("additive and contextual"). Common details in popovers have been pulled out and viewable immediately by customer.	DU
5. NAP + DU: Lack of personal details (e.g. order in question) was noted and 4 participants expressed a lessened trust in the authenticity of page.	2	Status: SIM CREATED Re-visit showing order data (picture, item name, etc) with ENG	CS contact
			DU
6. NAP + DU: Warning alert at top of page may not be viewed on PC as often as on mobile.	2	Status: SIM CREATED a) Explore horizontal width reduction to match NAP + DU width for improved vertical scan. b) Reach out to retail UX office hours for direction.	DU
7. When asked for first impressions, a majority of participants used words associated with distrust such as 'phishing', 'scam'. They noted that, after initial review, they may do the following to validate: a. contact CS b. use external tools/searches to validate the request c. not complete the NAP + DU until verified by a human When commenting on the document upload section specifically, 1 participant stated that 'Amazon would never ask for a billing statement'.	2	Status: COMM. STARTED with Help team (Paul) a) Improve header/footer. b) Prominent links to retail FAQs could reinforce trust in the request and deter potentially false 3 rd party information.	CS contact
			DU
8. A majority of the participants only receive/view financial related statements digitally.	2	Viewer functionality could be built into customer NAP + DU page: - Redaction tools (simple) - Crop to remove concerns over sharing sensitive information (e.g. purchases) - Zoom: to enable redaction & cropping functions	DU
9. 2-4 participants noted that incorporating a Challenge inline or as a step that precedes NAP + DU may enable trust and improve overall conversion	2	Status: DISCUSSIONS ONGOING, 3DS exploration Product/ENG to explore LOE and CX	DU
			ATO
10. 6 of 9 participants chose the option 'Unable to attach a document' based on their vocalized concerns regarding	2	Status: WEBLAB IN PROGRESS Consider additional friction to respond in with generic option. Reinforce expediency of issue	DU

legitimacy, privacy or secure document transmission/storage		resolution if adding billing statement or GC receipt	
11. "24 hours is a long time to wait", participants noted an expected quicker overall resolution time	2	Consider additional messaging (e.g. a status progress tracker), or means (sms/notifications of status/resolution)	DU ATO
12. 2-3 participants noted that the Mobile NAP + DU process would be 'a lot of steps' and 'frustrating'	1	Status: WEBLAB IN PROGRESS TBD or acknowledge to customer the multi-step process that is required (FAQ, illustration) up front	DU
13. A minority of participants verbally asked what part of the billing statement is required or only took a picture of the 'Header' (Name/Address/Phone, Account #)	1	Status: MOCKUP BELOW, Finding #2 Clarify with Ops what exactly is required for successful verification (Header only <i>or</i> complete page 1 of billing statement) and advise minimum requirements to customer	DU
14. 1 of 9 participants expressed concern with mobile photo of a billing statement as related to (often default OS setting of 'automatic') cloud syncing.	1	Product/ENG to deep dive implications of potential Amazon vulnerabilities.	DU
15. A minority of participants completed the 'Attach supporting document' out of sequence, did not notice step 1 (select 'Document type' radio button), or expressed that the UI appears 'unfinished'	1	UX/Product to consider alternate designs (e.g. 3 step process)	DU

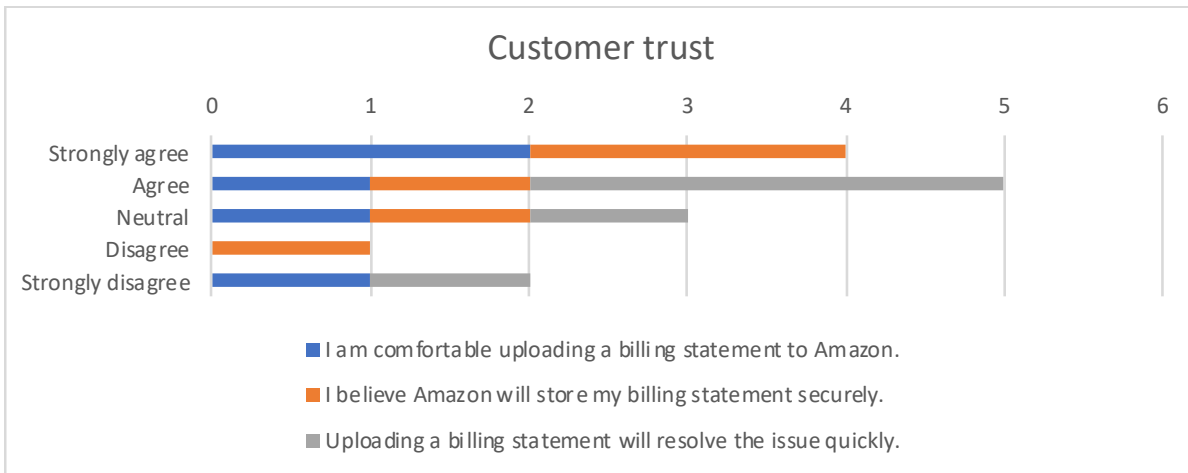
* USR scale (Nielsen Norman Group)
0 = I don't agree that this is a usability problem at all
1 = Cosmetic problem only: need not be fixed unless extra time is available on project
2 = Minor usability problem: fixing this should be given low priority
3 = Major usability problem: important to fix, so should be given high priority
4 = Usability catastrophe: imperative to fix this before product can be released

DOC Upload Additional Findings

Finding #1

Customer trust when uploading is positive (9/15, 60%, responses are 'strongly agree' or 'agree') when considering the following:

1. Comfort with uploading
2. Trust DOC is stored securely at Amazon
3. Uploading will aid in issue resolution



Finding #2 (Issue #11)

Consider inline 'helper' image on NAP + DU page to show exactly what is needed and information redacted

Attach supporting document
To help unlock your account faster.

Document type

- Billing statement (bank, credit/debit card) [Details](#) ▾
- Please ensure ONLY the last four digits of the card are visible. For your security, do NOT include full card or account numbers.
- Gift card receipt [Details](#) ▾
- Unable to attach a document

Document upload

Choose File No file chosen

CHASE

JPMorgan Chase Bank N.A.
Ohio/West Virginia Markets
P O Box 260180
Baton Rouge, LA 70826-0180

July 1, 2008 through July 31, 2008
Primary Account: 000000001483

Only last 4 digits

00013422 DDA 001 LA 10205 - YYN T 1 00000000 07 0000

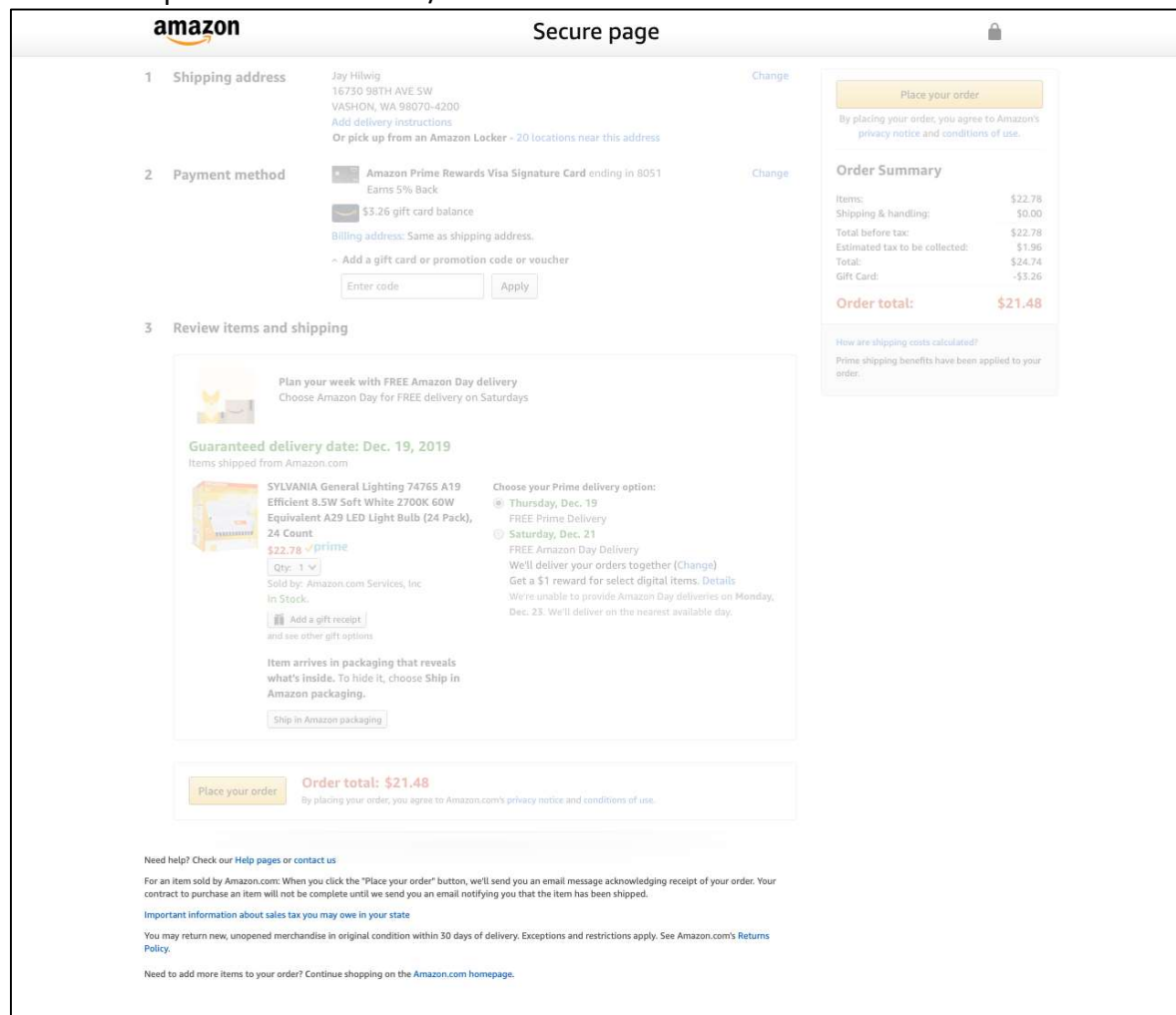
Jay Hilwig
123 Main Street
Seattle, WA 98109

CUSTOMER SERVICE INFORMATION

WebSite: www.Chase.com
 Service Center: 1-800-935-9935
 Hearing Impaired: 1-800-242-7383
 Para Espanol: 1-877-312-4273
 International Calls: 1-713-262-1679

Finding #3 (Issue #6)

Consider improved retail header/footer



Missed opportunity #1

The participants did not mention that requiring a login name+password reinforced a feeling of increased trust during task 1 or 2 (Login and fill out NAP form). Unfortunately, this was not included in the study as a follow up question to participants post task completion.

DOC Upload System Usability Score (SUS)

78.33333333

The average SUS score is 68 (average across 500 studies).
 To be in the top 10% of all web sites, a score of 80 or higher is required.
 Source: Nielsen/Norman

(See Appendix 3 for raw scoring)

ATO Additional Findings

NOTE: The design used for Dec 10/11 testing, (See Appendix 4 for test design), has evolved since the test. Current design is here:

https://drive-render.corp.amazon.com/view/jhilwig@/CSSW/index.html#id=2j49ei&p= ato_v1_suspect_v5

Finding #1

‘Your Orders’ (YO) is the **first** touchpoint for customer to investigate, and report, a suspicious order (5 of 8 participants)

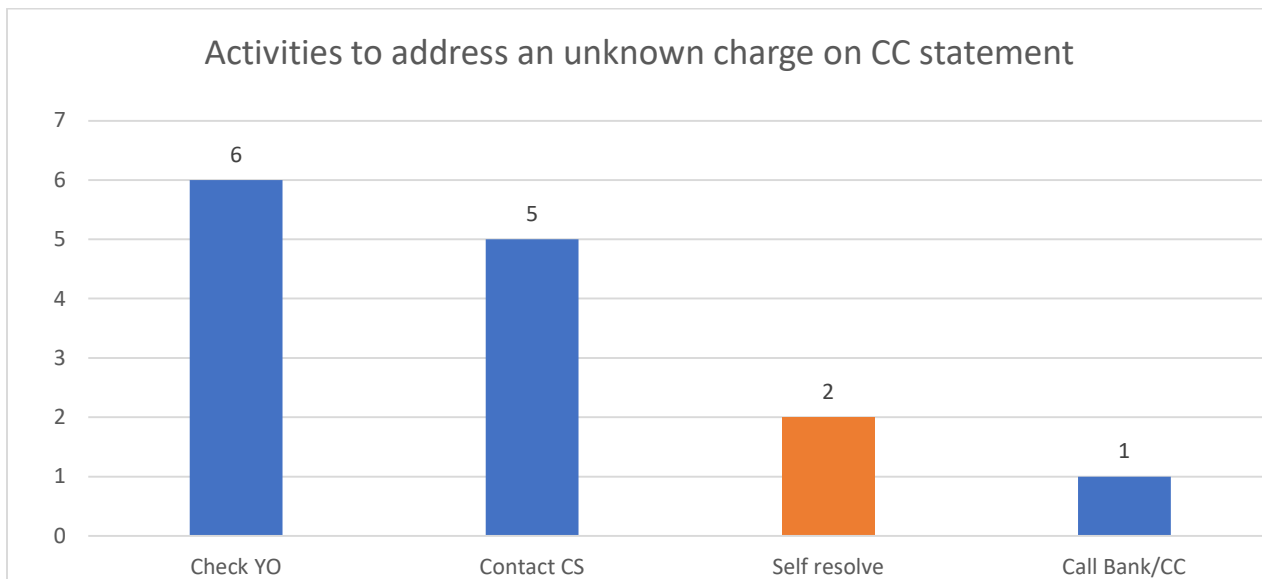
Contact CS was the **second** touchpoint, after YO, to investigate, and report, a suspicious order (4 of 8 participants)

Recommendation: n/a, see #3 for consideration regarding YO integration

Finding #2

A combination of viewing YO, contacting CS, and self-resolution, if available, were identified either singularly, or a combination of all 3, as activities to resolve an unknown charge (8 participants). Only 1 of 8 mentioned calling their credit card company as an initial step.

Recommendation: n/a



Findings #3

Direct integration via a button, ‘Report unrecognized purchase’, into specific Orders on YO page was preferred by 5 of 7 participants. 2 participants noted that a single, global link into the YO page may be difficult to find.


Recommendation:

a. Talk with checkout team about integration into individual YO orders. Can a button be dynamically shown on potential ATO orders?

b. If YO order integration is not feasible, consider multiple weblab treatments on single/global UI (button, hyperlink) treatment.

ORDER PLACED December 3, 2019	TOTAL \$889.56	SHIP TO zach amex ▾	ORDER # 114-7811517-7637814 Order Details Invoice
----------------------------------	-------------------	------------------------	--

Arriving Dec 9 - Dec 11 [Why this date?](#) ▾



WEN DF1100T 11,000-Watt 120V/240V Dual Fuel Portable Generator with Wheel Kit and Electric Start - CARB Compliant, Black
 Sold by: Amazon.com Services, Inc
 Return eligible through Jan 31, 2020
\$819.12

[Buy it again](#)

[Track package](#)

[Get product support](#)

[Return or replace items](#)

[Report unrecognized purchase](#)

[Archive order](#)

Finding #4

A majority of participants noted they would complete the ATO workflow either partially or fully. For those, who were not confident to fully complete the workflow, they mentioned that contacting CS would be a parallel task while viewing the workflow.

Recommendation: Consider messaging that promotes the ATO workflow as the most effective and efficient means to resolve their issue.

Finding #5

FAQs reinforce trust in security related issues or concern by allowing self-guided research on a trusted portal (Amazon 'Help'). Additionally, authentic hyperlinks may help customers concerned with potential phishing websites.

Recommendation: As in the DOC upload feedback, consider FAQ and improved header/footer to reinforce trust in the UI.

Finding #6

Incorporating challenges into the ATO workflow may be more preferable, as reported by participants, to NAP, NAP/DU.

Recommendation: Product team in discussion with TIV/3DS solution leaders.

Finding #7

The more details that can be revealed to customers, without enabling further bad actor behavior, may encourage completion of the ATO workflow.

Recommendation: Latest design reflects incorporating details that reflect all participants feedback.

Finding #8

Longer SLAs in ATO scenarios will encourage customers to contact CS and may impact their trust of Amazon as a secure and responsive company. A majority of customers noted that ATO is an alarming event (compared to phishing and other security concerns) that need immediate attention with potentially multiple parties (Self-serve, CS, CC company) involved in resolving.

Recommendation: Consider overcommunicating the next steps and expected SLA. In addition to end of workflow success screen, email and/or mobile communication may help reassure the customer the issue is being actively investigated. Shorter SLA than 24 hours planned?

CS Contact Additional Findings

Finding #1, usability theme 6

When asked why they would contact CS after being presented with 3 BRP related scenarios (see Appendix 2), comments included:

Security concerns

Assume phishing scam

Make sure it's legitimate, wary of divulging personal information

Phone is fast, email slow

Military MO (participant wanted to assure CS that he travels often)

Recommendation: n/a

Finding #2, usability theme 1, 6

FAQs reinforce trust in security related issues or concern by allowing self-guided research on a trusted portal (Amazon 'Help').

Recommendation: Work with Help (?) team to craft unique FAQs for BRP related issues.

Recommendation 2: Future Product design could consider a dedicated BRP page under 'Your Account' umbrella (e.g. 'Your Account Security Center')

Finding #3, usability theme 1, 6

Clear and detailed information throughout the interface may instill additional trust and deter CS contact.

Recommendation: Work with UX Writers and CXBR for continuous improvements to content/messaging.

Finding #4, usability theme 1

CS associates were reported by participants as highly trusted sources of information.

They noted that associates can:

1. Validate legitimacy of a request coming from Amazon
2. Provide additional information on an issue (not seen in an Amazon e-mail or webpage) such as the status of the issue or additional details
3. Guide the customer through issue resolution, ensuring that it is complete on both the customer and Amazon side

Recommendation: Consider methods that could substitute for the 'human touch' customers report as needing when their security may be compromised.

- a) Route incoming call to automated IVR solution based on account status or other signal(s) that can ensure and encourage customer to self-serve without requiring CSA intervention.
- b) Integrated CS Chat channel into CSSW experiences
- c) mShop challenges were cited as an acceptable experience that could be incorporated into the DU workflow to build additional trust, improve conversion, and deter CS contacts.

Finding #5, usability theme 1

Customer would contact CS if they felt the request was suspicious, looked like phishing, or the request was generated from questionable sources (spoofed email, SMS were cited).

Recommendation: Continue incorporating header/footer UI with enhanced Amazon branding, current DU page was stated by participants as 'suspicious', 'fake'.

APPENDIX 1 – Participant profiles

N=9	First name	Age	Occupation reported	Tech comfort level*	Session date & start time
P1	Peggy L.	41	Attorney	4	12/10 @ 11:30am
P2	Grant K.	32	Bartender	4	12/10 @ 1:30pm
P3	Isabella M.	23	Certified Nursing Assistant	4	12/10 @ 3pm
P4	Kenneth R.	40	IT Consultant	5	12/10 @ 4pm
P5	Angela R.	33	Shopper / Shipt	3	12/11 @ 10am
P6	Tanya B.	42	Homemaker	3	12/11 @ 11:30am
P7	Mark J.	52	-	3	12/11 @ 1:30pm
P8	Chris J.	42	-	3	12/11 @ 3pm
P9	John G.	63	Uber driver	3	12/11 @ 4pm

* Tech comfort level is a self-reported scale where 1 is 'not at all comfortable and avoid technology' and 5 is 'highly proficient and are passionate about technology'. For test purposes, participants reporting 1 are screened out given the product nature.

APPENDIX 2 – CS contact & scenario responses

In the following scenarios, when would you contact CS and when would you take care of, or self-serve (SS), the issue by yourself?								
#	Name	How often contact CS	Channel	Did not receive a package	Report suspicious activity on my account	Need to return an item and request a refund	Respond to a request from Amazon to upload a document	Respond to a request from Amazon to enter personal information (for example you name or address)
1	Peggy L.	Once or twice a year	Phone	SS	CS	CS	CS	CS
2	Grant K.	Almost never	Email	SS	SS	SS	CS	CS
3	Isabella M.	Almost never	Phone	SS	CS	SS	CS	CS
4	Kenneth R.	Almost never	Phone	SS	CS	CS	SS	SS
5	Angela R.	Often, every few months	Phone	CS	CS	CS	CS	CS
6	Tanya B.	Once or twice a year	Phone	SS	CS	SS	CS	CS
7	Mark J.	Once or twice a year	Phone	SS	CS	SS	CS	CS
8	Chris J.	Once or twice a year	Phone	SS	CS	CS	SS	SS
9	John G.	Almost never	Email	SS	CS	SS	CS	CS

Appendix 3 – SUS score

#	Name	I think I would like to use this tool frequently.	I found the tool unnecessarily complex.	I thought the tool was easy to use.	I think that I would need the support of a technical person to be able to use this system.	I found the various functions in this tool were well integrated.	I thought there was too much inconsistency in this tool.	I would imagine that most people would learn to use this tool very quickly.	I found the tool very cumbersome to use.	I felt very confident using the tool.	I needed to learn a lot of things before I could get going with this tool.
1	Peggy L.	3	1	5	1	5	1	5	1	1	
2	Grant K.	2	2	4	1	3	1	4	4	2	4
3	Isabella M.	3	1	5	1	5	1	4	5	5	1
4	Kenneth R.	2	1	5	2	5	1	5	2	5	2
5	Angela R.	2	4	3	3	4	1	5	1	5	1
6	Tanya B.	3	4	3	1	3	1	5	4	5	5
7	Mark J.	3	1	5	1	5	3	5	1	5	3
8	Chris J.	4	1	5	1	2	2	5	2	4	2
9	John G.	4	1	5	1	5	1	4	1	5	1

Likert scale spanning 1- strongly disagree to 5-strongly agree.

APPENDIX 4 – ATO Form, Dec 10/11