

## Overview

### Executive Summary

The purpose of this document is to gain alignment on the Global IT (GIT) Client Access Experience (CAE) program, which provides global user feedback on products and services within Global IT.

### Introduction

Before the launch of the CAE program, on September 4, 2018, Global IT (GIT) developed and launched products to Amazonians without a scalable way to collect customer experience (CX) insights. The Working Backwards process provides a good mechanism to identify target users, their needs, and define what the customer experience could be based on an aspirational customer journey, in most cases built based on customer's feedback. However, if the product owner wanted to validate this customer journey or experience would work, or wanted to learn more about how the customer works and dive deeper into the customer's need, significant traveling can be required.

As an example, when the Omnia<sup>1</sup> project started, both the Product and Technical Program Managers embarked in a trip around the globe to observe how different customers performing the same function worked, with the goal of identifying variations in their work process driven by cultural background, local regulations and needs. This resulted in a total of 4.5 weeks of travel covering the U.S. west coast (PDX, and SJC), India (BLR), UK (EDI) and Costa Rica (SJO). The amount of traveling and expenses associated doesn't allow this model to scale.

The CAE program was created to address the need for a scalable mechanism to validate user experiences with global presence. It is coordinated by a CAE Core Team, comprised of the CAE Program Manager and Regional Leads for AMER, EMEA, INDIA, and APAC, with a total -As of June 1, 2019- of 30 CAE Ambassadors distributed across the globe.

The program allows validation of a product's CX before anything is built or before resources have been invested. The following quote emphasizes the importance of validating experiences as early in the process as possible:

*"Many of the issues we have discovered after having built a feature could have been discovered before engineers spent time building by using user studies, or wizard of oz testing<sup>2</sup>." - Jeff Swanson, Amazon Global IT Product Manager-Technical*

In its first version, the CAE program focused on client access technologies, taking on Amazon Enterprise Access<sup>3</sup> (AEA) as their number one priority to partner with to deliver the right CX. Since its launch, the CAE program has executed user studies in products like Midway, Midway VPN, and USB security key registration. More details about these studies can be found in Appendix D.

The CAE program provides a scalable resource to improve products customer experience by working backwards from the customer and influencing designs, by working with the product owners, that are designed around the targeted users.

Considering that CX is an area all products developed or launched by Global IT can benefit from, the CAE program will be evolving over the next two years, expanding its coverage to all products Global IT develop and launch for Amazonians. We will accomplish this growth by implementing project management discipline within our processes, onboard our intake into OneDoor<sup>4</sup>, expanding the number of CAE Ambassadors globally and ideating other services that we can provide to the Global IT product owners community. A general overview of this roadmap is available in Appendix

Commented [HJ1]: Spell out all acronyms on first reference

Commented [CA2]: Consider making a request to the read; an ask for alignment or commitment to a process or something else.

Commented [FF3]: Is the only purpose to provide an overview?

Commented [SJ4]: Wordy -- purpose of this document is to (what you want) the CAE program..... ie Purpose of this document is to gain alignment on the CAE program which provides global user feedback on products and services within Global IT

Commented [SJ5]: After reading the doc - I'm not sure what it's trying to achieve.

If you're trying to say here is our program and what we do I think you can tighten it up and use the structure / headers to call that out.

Right now it reads like an introductory to UX methodology and seems like it's trying to sell that?

Is this asking for funding? Is it an OP1 project? A program review?

Commented [CA6]: Imprecise heading. Start with a problem and/or opportunity. Then articulate how CAE Program solves it.

Commented [HJ7]: You're clearing your throat. You can delete these paragraphs.

Commented [HJ8]: Passive voice.

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Commented [HJ9]: Given what you say later about the CAE ambassadors and how they are selected, explain here how all CAE program managers and regional leads have UX experience. If they do not, how are they expected to train the ambassadors?

Commented [HJ10]: Finish this thought

Commented [HJ11]: Explain what these people are, what they do, how they are selected.

Commented [HJ12]: Passive voice.

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Commented [HJ13]: You can eliminate this. It raises questions about what is different between the first version of CAE and the version you're explaining, but doesn't answer them. .

Commented [CA14]: A testimonial from an Amazonian would be more powerful.

Also, I'm not sure the purpose of this whole section on the value of UX research. I think you are preaching to the choir on this. It could be an FAQ.

Instead, it would be more interesting to explain how CAE Program fits into the product strategy lifecycle and/or how UX research is a flywheel in product dev and/or can serve as part of a mechanism the ensures user-centered product development.

Commented [HJ15]: This should be the first sentence in the document.

Commented [HJ16]: Which appendix?

<sup>1</sup> Omnia is a platform or suite of features designed to be a single place where IT Support Engineers can perform all their functions.

<sup>2</sup> Wizard of Oz (originally OZ paradigm) testing is a technique of common use in usability engineering wherein an experimenter (the "wizard"), in a laboratory setting, simulates the behavior of a theoretical intelligent computer application (often by going into another room and intercepting all communications between participant and system). (from [https://en.wikipedia.org/wiki/Wizard\\_of\\_Oz\\_experiment](https://en.wikipedia.org/wiki/Wizard_of_Oz_experiment))

<sup>3</sup> AEA is a product that will provide Amazonians with a better customer experience, enabling them to access corporate services securely from trusted devices (laptops and mobiles) from any network without requiring a VPN connection

<sup>4</sup> Global IT's One Door projects intake mechanism provides a simple interface to submit project work requests, and engage GIT teams to evaluate, approve, manage and track a project request throughout its life-cycle. More information is available at <https://w.amazon.com/bin/view/Onedoor/>

## Global IT – CLIENT ACCESS EXPERIENCE (CAE) PROGRAM

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### Vision

The CAE program will improve the customer experience and productivity of Amazonians. We will leverage resources distributed across the globe and existing user experience (UX) and user research study methodologies to identify usability problems, collect qualitative data, and determine participant's overall satisfaction with the product. These insights will be used to influence the product design. Since its launch in September 2018, the CAE program has contributed TK hours to GIT's productivity savings goal.

Commented [HJ17]: By how much? 5% 10%? How will you measure?

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Commented [HJ18]: How?

Commented [HJ19]: If it's already launched, why write the doc? Explain why you're writing this doc in the exec summary. Also, if the Director of Global IT read the executive summary, would she know enough to form an opinion or act? If not, flesh it out.

Commented [HJ20]: Passive voice.

Commented [HJ21]: Is this really appropriate for CAE? How does it manifest itself?

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### CAE Tenets (unless you know better ones)

- Customers adopt products they love – We work backwards from our customers to ensure lovable products are designed. We do not force customers to adopt a product where we have not sought to understand their needs.
- Listen, don't justify – Accept our customer problems as truths.
- Minimize mindshare – Reduce what our customers must remember to be productive.
- Customer experience and customer productivity gains are our North Star – While we prioritize products that deliver the biggest customer benefit, a product that mitigates a security risk will always be top priority.

### Goals and Outcomes

- Create a CAE User Research framework - GIT has used the Voice of the Customer (VOC) framework, in 2018, to gather feedback from customers through surveys for AWS go-to-market products. GIT also currently uses the Client Deployments framework as a gating mechanism, to ensure product experiments and deployments meet the required IT support bar. Consumer Engagement's Retail Engineering Design (RED) has an established user research framework<sup>5</sup> to walk the store<sup>5</sup> and run usability studies. CAE has combined components from these three frameworks into the CAE User Research framework.

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This framework gathers diverse user research at scale for products developed by GIT and AWS Corporate Systems, and measures and deepens our understanding of the customer experience to ensure lovable products. The data gathered influences technical and process design changes to ensure lovable products are developed and adopted by our customers, and contributes to the CXI score. We achieve this via training GIT CAE Ambassadors, who engage their customers in region to gather diverse UX insights from across the globe.

Commented [HJ22]: Someone is bound to ask what types of data you gather. You can avoid that question if you answer it here.

Commented [HJ23]: Across all of Amazon or Global IT. In either case, say so.

Commented [HJ24]: If you say Global IT in the previous sentence, this sentence becomes unnecessary. That's a good thing.

We built the framework so that it can be used by all products. Although the initial focus of the program was on client access technologies and products, it is now expanding to cover all client products and technologies developed or implemented by GIT.

Commented [HJ25]: Nope. You just said if we do 100 bad studies, that's success.

Commented [HJ26]: This is the same as the first bullet point.

We will measure success of this goal through the following metrics:

- Number of overall studies executed and per type (UX/Usability, Walk the Store, User research)
- Number of products leveraging user studies
- Number of studies

- Build a global CAE Ambassadors team – CAE Ambassadors are people in GIT who have an affinity to listen and not justify, and who accept our customer problems as truths. They volunteer or are nominated by their management and have a level of effort (LOE) of up to 4 hours per week dependent on the CAE product/feature, experiments and user data needed at the time. We track actual LOE to assure they don't go over agreed thresholds without agreement from regional managers.

Commented [HJ27]: That's the bar? No UX experience at all? How do you know if their studies are accurate?

Can an L3 be a member? What's the L-bar? Spell it out.

Staff is trained on UX research (user research, usability studies, and walking the store) by the CAE Core team (CAE program owner and Regional Leads) which ensures Ambassadors understand and buy into the vision of the program, learn about UX, and are able to play the role of a study moderator and observer. They engage their customers in region to gather diverse UX insights from across the globe. They get to influence technical and

Commented [HJ28]: Put the most important qualification first.

Commented [HJ29]: Be more emphatic. Learning about something is a low bar. I have learned about open heart surgery....you get my point.

<sup>5</sup> Walk the Store is a self-service process that enables Product Managers, Designers, Developers, and other disciplines to identify and eliminate likely customer experience issues with a product/feature.

## Global IT – CLIENT ACCESS EXPERIENCE (CAE) PROGRAM

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process design changes through CX study result reports (See Appendix E for a sample) and [by](#) working with product owners, to ensure lovable products are developed and adopted by our customers.

As of June 1, 2019, we have 30 GIT CAE Ambassadors, that either volunteered or were nominated by their management, from all regions: 7 in AMER, 15 in APAC/INDIA, and 8 in EMEA. We will measure [the](#) success of this goal based on the following metrics:

- Number of trainers per region
- Number of ambassadors per region
- Average of studies per ambassador

3. **Help improve the Customer Experience for Products** – Using the CAE User Research Framework, we partner with stakeholders [both inside](#) and outside GIT to provide Amazonians with customer experiences that make them more productive by identifying, early in the design cycle, what works and doesn't work for the customer.

We execute moderated user studies, in which each of the customers that participate spends between 10 to 20 minutes individually with the moderator and observers depending on the product and study complexity. This time is not a huge commitment for the participant, and enough to capture the feedback and insights desired.

We meet on a monthly basis with CE's Retail Engineering Design (RED) customer experience team to review our process and results from our studies, to assure we perform them based on global Amazon standards.

[We will measure the success of this goal based on the following metrics:](#)

- Number of products leveraging user studies
- Number of recommendations adopted as a proxy for customer experience
- Contributions to CXI, and GIT Productivity Savings and Efficiency goals<sup>6</sup>

### Services Blueprint and Best Practices

The process to request the CAE program to perform a CX study starts with the requestor filling up an intake form. The information requested at intake, as well as the blueprint and timeline followed for the studies are documented in Appendix A.

The CAE program performs two types of user studies: UX/Usability studies and user research/exploratory studies. Detailed information about each of these studies and the best practices that apply to each type are available in Appendix B.

## FAQ

### 1. Who are the key stakeholders?

Global IT Leadership, CAE Regional Leaders and Ambassadors, GIT product managers, as well as any product owner within Global IT and partner team that can benefit from the CAE program are our stakeholders. Since the launch of the program in September 2018, we have partnered with the following teams:

[<SNIP>](#)

**Commented [HJ30]:** Are these the best metrics for program success? They may be. I don't know. The point is, have an explanation about why they are in your back pocket in case someone asks.

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**Commented [HJ31]:** This should be at the top, not the bottom, of the document.

**Commented [HJ32]:** Here's a question. How does someone who needs your service get in touch? That is not described anywhere in the document. At minimum it should be here.

<sup>6</sup> The amount of contribution to CXI, Productivity Savings and/or Efficiency will be defined in a case-by-case basis in partnership with the product owner, since this contribution has a hard dependency on the product and features being studied and cannot be predicted.