



Giving Voice to CRM Applications

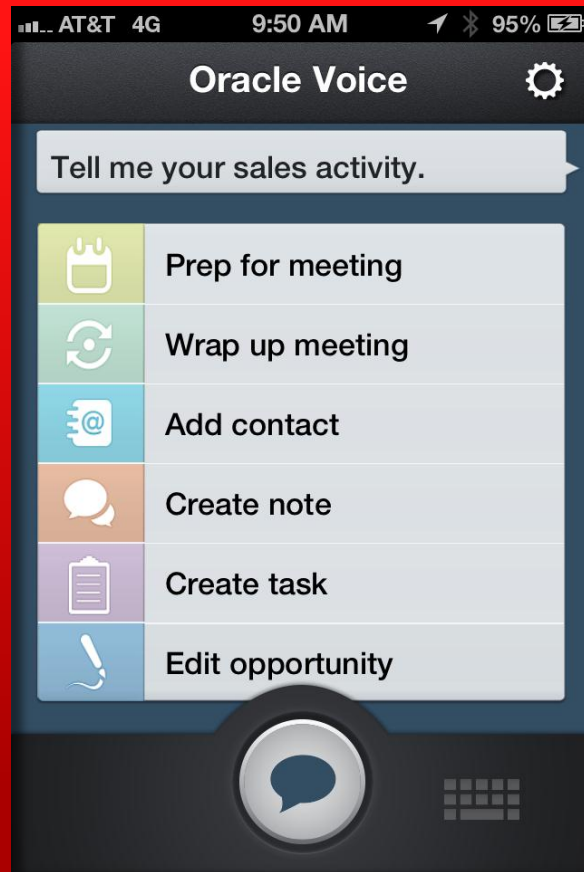
Lessons from a field trial

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Background

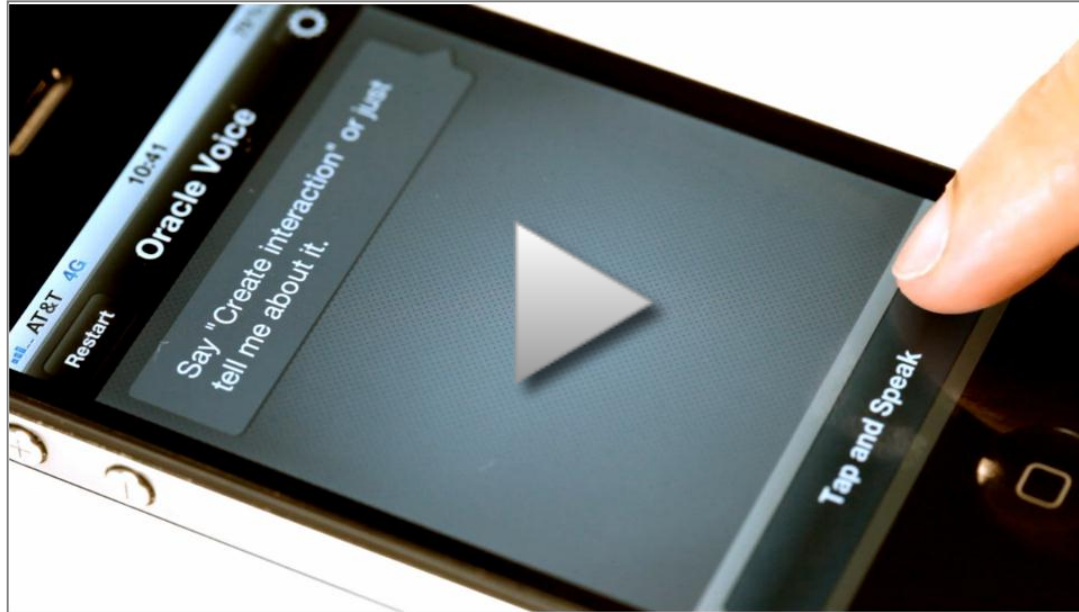
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- Sales reps must document customer interactions
 - Notes, contacts, follow up tasks, scheduling
- Reps carry tablets and smartphones
- Apps on mobile devices are inefficient for entering data
- Details are lost when interactions are entered at the end of the day

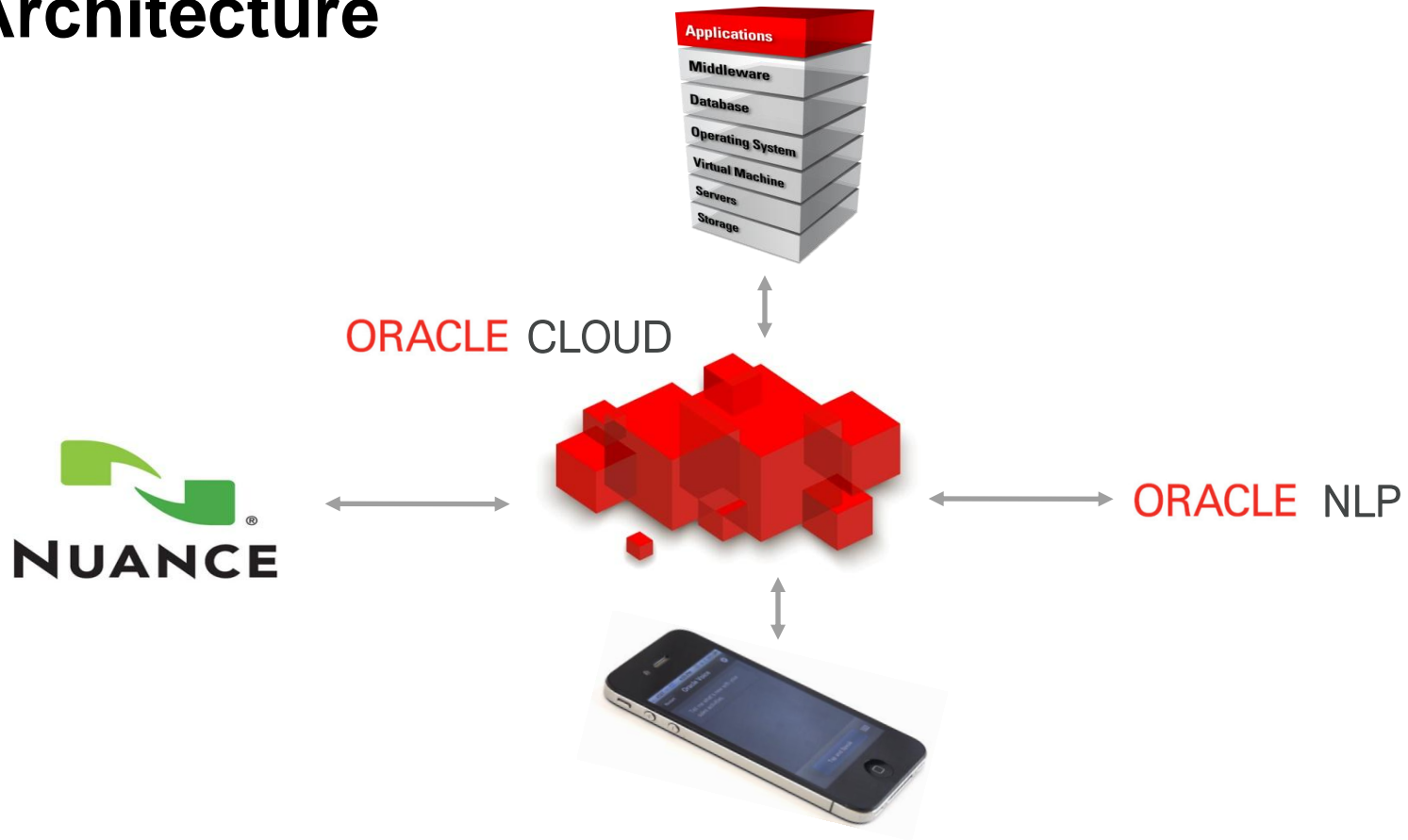


Video

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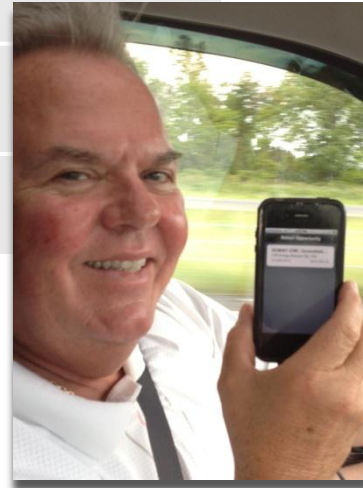
Architecture



Research Methodology

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Method	Location	N Participants
Paper Prototype	Oracle Usability Lab	6
Structured Interviews	Remote Sessions	15
Usability Study	Oracle Usability Lab	6



Findings

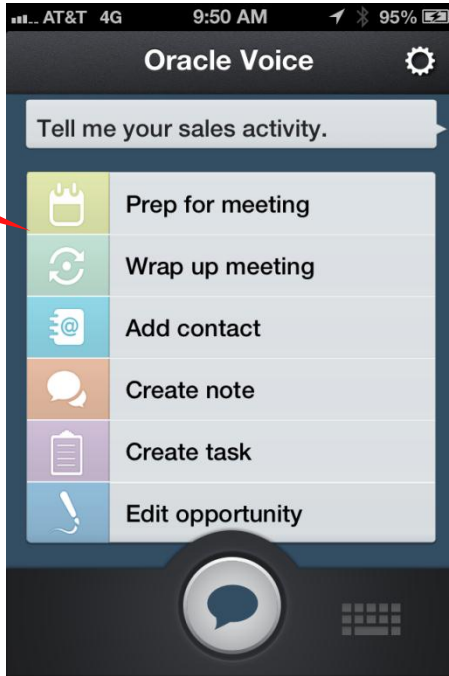
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Instrument & Method	Key Findings
Paper Prototype: Lab Usability Study	<ul style="list-style-type: none">• Sales terms vary by user• Conversation length preference• Work process
Functional Prototype: Remote Interviews	<ul style="list-style-type: none">• Environment problems related to noise, performance & 3rd party devices• Proper noun problem• Identified missing functionality
Functional Prototype: Lab Usability Study	<ul style="list-style-type: none">• The system misunderstood intent (and participant didn't realize it)• Microphone interaction was a problem• Off screen help section was of minimal value

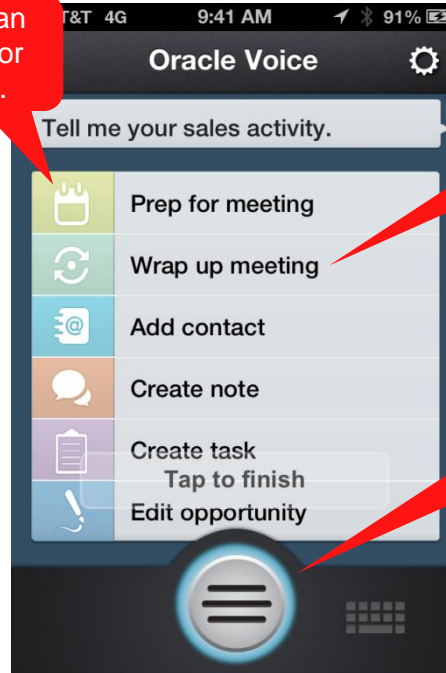
Redesign

User Interface

Menu of common actions is presented with question.



User can speak or touch.



Abstract terms such as interaction have been replaced.

Microphone state visually flips to listening mode.

Redesign

Speech Recognition

General language SR

Oracle data SR

Integrated SR



Takeaways

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- A quick prototype development cycle to field study brings key issues to the surface.
- Understand how the speech recognition and NLP technologies affect the user experience. You might have to design around them.
- Multiple research methods provide comprehensive understanding of user experience issues.
- Focus on deep knowledge of a specific domain.

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