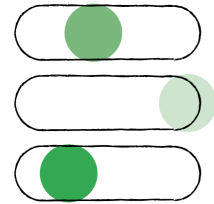


Feedback + Control

Chapter worksheet



Instructions

Block out time to get as many cross-functional leads as possible together in a room to work through these exercises & checklists.

Exercises

1. User expectations for control [~30 minutes]

Review situations or events in your app where your users want or need higher levels of control.

2. Feedback audit & prioritization [~2 hours]

Audit feedback mechanisms, define the priority and specificity of feedback signals, and determine how you'll integrate user feedback in your product.

3. Validate feedback mechanisms [multiple sessions]

Conduct user research to understand whether or not your feedback mechanisms are working as intended and set aside time to review feedback from users.

1. User expectations for control

Take time to reflect on what aspects of the system the user expects to have control over and why. Use the checklist and template below to help identify the right level of control and customization. Make sure you validate your hypotheses with user research.

Note: You might want to complete this activity after some initial user testing depending on your familiarity with your user groups. You may also want to revisit any exercises you did from [User needs + defining success](#) chapter.

Higher need for user control

- ☐ The AI cannot yet accommodate a wide range of user abilities and/or preferences.
- ☐ The AI deals with highly-sensitive domains: money, business, relationships, or health.
- ☐ The AI might take a long time to get to the target level of accuracy and usefulness. User controls could be a good stop-gap measure in the meantime.
- ☐ AI is used in a high-stakes situations for which AI presents a new interaction paradigm. The user might want the option to be in full control at first as they build trust in the system.
- ☐ System limitations or other potential errors will require user control to correct the system. More detail in the [Errors + graceful failure](#) chapter.
- ☐ There are likely scenarios in which changes in the user's circumstances require them to "reset" or otherwise "take over" for the model. For example: user is now vegetarian, so previous restaurant recommendations are no longer relevant.

Mapping a user's need for control

Use the template below to map out how much control your user needs across different interactions with your app. Refer to your user groups from the Mental Models worksheet.

Example product: AI that recommends recipes based on the contents of a picture the user submits.

Users	Event / Task / Feature	Level of user control needed
First time users	Users have unique dietary needs	<input checked="" type="checkbox"/> high
		<input type="checkbox"/> low <input type="checkbox"/> medium <input type="checkbox"/> high <input type="checkbox"/> unsure
		<input type="checkbox"/> low <input type="checkbox"/> medium <input type="checkbox"/> high <input type="checkbox"/> unsure
		<input type="checkbox"/> low <input type="checkbox"/> medium <input type="checkbox"/> high <input type="checkbox"/> unsure
		<input type="checkbox"/> low <input type="checkbox"/> medium <input type="checkbox"/> high <input type="checkbox"/> unsure
		<input type="checkbox"/> low <input type="checkbox"/> medium <input type="checkbox"/> high <input type="checkbox"/> unsure

2. Feedback

The person responsible for your product's user research should block out time to take stock of existing or potential feedback mechanisms.

Consult with engineers, designers, product counsel, and other stakeholders as needed to generate a truly comprehensive audit. Use the template below to map current and potential feedback mechanisms in your product.

Feedback audit

List out events and corresponding feedback opportunities that could provide data to improve the AI in your product. Cast a wide net and list as many as possible: App Store reviews, Twitter, email, call centers, push notifications, etc. Add more rows as needed.

Example product: AI that recommends recipes based on the contents of a picture the user submits.

Event	Feedback	Type of Feedback
User completes a recommended recipe	User prompted to rate relevance of completed recipe	<input type="checkbox"/> implicit <input checked="" type="checkbox"/> explicit
User rejects recommendations including a certain ingredient	Specific ingredient is outside of users preferences	<input checked="" type="checkbox"/> implicit <input type="checkbox"/> explicit
		<input type="checkbox"/> implicit <input type="checkbox"/> explicit
		<input type="checkbox"/> implicit <input type="checkbox"/> explicit

		<input type="checkbox"/> implicit <input type="checkbox"/> explicit
		<input type="checkbox"/> implicit <input type="checkbox"/> explicit
		<input type="checkbox"/> implicit <input type="checkbox"/> explicit

Feedback prioritization

After auditing all the potential sources of feedback, prioritize what feedback will need to be collected to impact the AI.

When prioritizing feedback opportunities to improve the user experience with the AI ask yourselves:

- ☐ Do all of your user groups benefit from this feedback?
- ☐ How might the level of control that the user has over the AI that the user has (or wants to have) influence the user's desire to provide feedback?
- ☐ How will the AI change from this feedback?

Feedback mission statement

After discussing the above questions, use the template below to write mission statements for each source of feedback that your team agrees can be used to alter the AI. Revisit this exercise as features get added or deprecated that impact the user's interaction with the AI.

We want to collect _____ { **type of user feedback** } _____,
so we can improve _____ { **user interaction with AI** } _____
By _____ { **change made to the AI** } _____.

Feedback mission statement 1

Feedback mission statement 2

Feedback mission statement 3

Feedback specification

Take the feedback mission statements your team has prioritized through the template below to get more specific about the feedback lifecycle. Feel free to add categories relevant to your product as necessary.

Subject of feedback	
<p>Feedback Mission Statement</p> <p>We want to collect _____</p> <p>_____</p> <p>so we can improve_____</p> <p>_____</p> <p>by_____</p> <p>_____</p>	<div> <input type="checkbox"/> Improves the system as a whole <input type="checkbox"/> Communicates with others <input type="checkbox"/> Improves personalization </div> <div> <p>Reviewed by:</p> <input type="checkbox"/> Engineering <input type="checkbox"/> Legal <input type="checkbox"/> Design <input type="checkbox"/> PM <input type="checkbox"/> User <input type="checkbox"/> Other </div>
<p>Timing and frequency</p> <p><i>Are we asking for feedback at the right moment for the user or the AI? What are the trade-offs?</i></p>	



Type of feedback

- ☐ implicit
- ☐ explicit
- ☐ qualitative
- ☐ quantitative

Ambiguity risks

Any risks of feedback being misinterpreted or having a dual meaning?

Feedback motivation

User motivation for feedback:

User value / benefit in giving feedback:

Timing until feedback value / user benefit / impact:

Alternative user value for feedback:

Feedback mechanism ideas

Example: a daily toast notification, an annual survey sent to linked email account

Acknowledgment

Is the acknowledgement specific and explicit about how and when the user's feedback will improve the AI?

Opt out & dismissal

Do we give users a way to opt out or dismiss the feedback mechanism?

3. Validate feedback mechanisms

Once your team has a detailed proposal for collecting feedback, test your proposal with users.

It can be hard to concept test feedback mechanisms in a realistic way when the user is not actually using the product as part of their day-to-day life. So, you may need to be creative in how you design a user study that will create the context under which the user will encounter the feedback mechanism. You may be able to do this also through diary studies or other forms of longitudinal studies with beta versions of your app.

User research methods

"Wizard of Oz" prototypes can also be a great method for collecting meaningful data around the feedback experience. Allocate time in your research plan for participants to submit content or examples ahead of the study session to use in your prototype feedback experience. Users will be more invested in critiquing the feedback and level of control if they can relate it back to their own data.

Example: If the recipe app plans to survey users each week about what recipes they cooked, you should consider planning a study that is a week long with a prototype version of the app.

Depending on the nature of your study, you might be able to observe user responses to feedback prompts and results, then query them with questions like this:

Research protocol questions

- Why do you think you're being asked for this feedback?
- What might influence your decision as to whether or not you'd provide feedback here?
 - How, if at all, do you expect your experience to change after you provide a response?
 - What other factors, if any, do you think will be used to change your experience over time? [probing on implicit feedback]
- [Towards the end of the session] You'd like to update a preference so that you see [more of / less of X]. Show me how you would do that.

Lastly, after validating your proposed feedback mechanisms, schedule time after the launch of your feature for your team to review actual feedback from users.

Feedback review session

Date for review of feedback:

Attendees: