

Research Plan

dbt Metrics

Summary

To align on an MVP approach for a dbt Metrics integration, we first need to better understand how customers expect to leverage metrics within the platform after creating them in dbt. While we have some [customer insight](#) on dbt's side and a working prototype POC, we don't yet have a clear idea of how our customers would ideally want to interact with metrics in the platform or a defined target audience for who would adopt the feature(s).

By learning more about user expectations and needs today, we can help to inform a product strategy and validate potential use cases around both code-first experiences and/or a visual query builder experience.

Hypothesis

Metrics Use Case

dbt expects us to define a perspective around the ideal user experience for engaging with metrics in the platform

- Who would be building metrics data sets, how do they want to do that, how would the reports be consumed?

Metrics will be useful for defining smaller, concrete topics but won't compete with the value prop of Reusable Datasets and the concept of sharing large, wide reusable sets of data

Non-Technical Users

Some non-technical audiences (ie Product Managers, Marketing teams) would find value in leveraging metrics to answer questions/build analyses

- Users shouldn't need to know how to write SQL to take advantage of dbt Metrics

Research Goals

- Understand who will be building data sets
- Determine who will consume reports
- Understand users' needs, motivation, and frustrations
- Provide opportunities and recommendations for the UX designer

Methodology

Internal User Feedback Sessions

Interview internal users to understand their metrics needs and capture their feedback on the existing designs. 30-minute 1:1 sessions via Zoom.

Unmoderated Mixed-Method Study

Survey customers to understand their needs. Remote and online via Survey Monkey.

External User Feedback Sessions

Interview external users to understand their metrics needs and capture their feedback on the existing designs. 45-minute 1:1 sessions via Zoom. Participants will be identified via an unmoderated study and will be completed after the data analysis of the study.

Dissemination of Findings

Deliver the findings report to stakeholders highlighting study methods, findings, opportunities, and recommendations.

Timeline

Week of	8/30	9/6	9/13
Write and test the survey			
Open survey			
Close survey			
Write study materials			

and scripts			
Stakeholder interviews			
Review existing data & process map			
Analyze study data and write a findings report			
Present findings			

Study Materials

Internal User Feedback Sessions

Interview internal users to understand their metrics needs and capture their feedback on the existing designs. 30-minute 1:1 sessions via Zoom.

Session Questions

How do you currently go about [problem/task]?
 Are you looking for a solution or alternative for [problem/task]?
 Tell me about the last time you tried to [problem/task].
 What are you currently doing to make this [problem/task] easier?
 Have you tried any workarounds to help you with this?
 Have you tried any other products or tools?
 If so, how did you hear about them?
 What's the most frustrating part about [problem/task]?
 How often do you encounter/perform [problem/task]?
 How long do you spend on [problem/task]?

Unmoderated Mixed-Method Study

Survey customers to understand their needs. Remote and online via Survey Monkey.

Invitation Copy



Email Subject: Product Feedback Opportunity

Good afternoon,

The research team needs your feedback on a new feature for defining and reporting on metrics. Your feedback directly affects product development.

This usability study will take approximately 10 minutes for you to complete. We are testing a new feature using design mockups, these screens might not look familiar to you.

To complete the usability study, click the link below. For the best experience please don't use a mobile device.

[INSERT STUDY LINK HERE]

Thank you,

Survey Copy

Screenener Question

Does your organization use metrics or data benchmarks?

Yes

No [go to end of session]

Unsure

Roles and Responsibilities

Tell me about your role and daily responsibilities. [open-ended]

What are the applications, tools, and websites you use the most in your work? [open-ended]

Metrics Questions

Which metrics are most important to you? [open-ended]

Which metrics are most important to leadership? [open-ended]

Who typically defines metrics for your organization? [multi-select]

Data Science

Leadership
Product
Other

Usability/Feedback Questions

[need designs]

Demographic Questions

Which best describes your role?

Business Intelligence
Data Analyst
Data Architect
Data Scientist
Data Engineer
Product
Leadership
Self describe

How long have you been using the platform

0-6 months
6-12 months
1-2 years
2-5 years
6 years or more

Are you interested in participating in a remote, 1:1 session with the design team?

Yes [go to email question]
No [go to end of session]

What is your email?

External User Feedback Sessions

Interview external users to understand their metrics needs and capture their feedback on the existing designs. 45-minute 1:1 sessions via Zoom. Participants will be identified via an unmoderated study and will be completed after the data analysis of the study.



Interview Invitation Copy

Hi [customer name]

The research team needs your feedback on a **new workflow for reusable metrics**. Your feedback directly affects product development.

The feedback session will be a **45-minute, 1:1 interview conducted via Zoom**. Sessions begin next week.

As a thank you for your participation, you will receive a \$50 gift card.

The fine print: Because this is a new feature in collaboration with a yet-to-be-released partner you will be asked to electronically sign an NDA before your session.

If you have any questions or are **interested in participating, respond to this email**.

Thank you,

[insert signature]

Interview Guide

Introduction

Hi, my name is [name] and I'll be walking you through the interview today. This is [name] who will be taking notes during our session.

Thank you for agreeing to speak with us today. The product team is working on designing a feature/ tool and we want to understand your needs and wants. The feature/tool will allow you to [describe].

We want to learn more about your workflow and day-to-day, so today we would like to ask you some questions about you, your role, and your day-to-day.

Our interview will last approximately 30 minutes. If you need to stop the interview for any reason we will do so. If it's ok with you, I'd like to ask for your permission to record this interview. The recording will only be used to help with our note-taking. Do I have your consent to record today's interview? {BEGIN RECORDING}

Great! Before we begin, do you have any questions for me?



Questions

1. Describe your role/day-to-day/experience with X.
2. Tell me about the last time you worked on [task].
3. How often do you work on [task]?
4. How much time do you typically spend on [task]?
5. What are some of your biggest challenges with [task]?
 - a. What do you think causes these challenges?
6. What tools do you use currently for [task]?
 - a. What do you like about those tools that you want to make sure we preserve in a new toolset?
 - b. What don't you like about those tools that you would like to see made better in a new toolset?
7. What information/data would you want to see about [task]?
8. Are there particular tasks that these tools don't work that well for? What doesn't work well, and how would you make it better?
9. What software enhancement/feature would make the biggest impact in your day-to-day?
10. What else would you like to share with us?
11. Does the team have any questions?