



# PRESENTATION — LISA KELLY

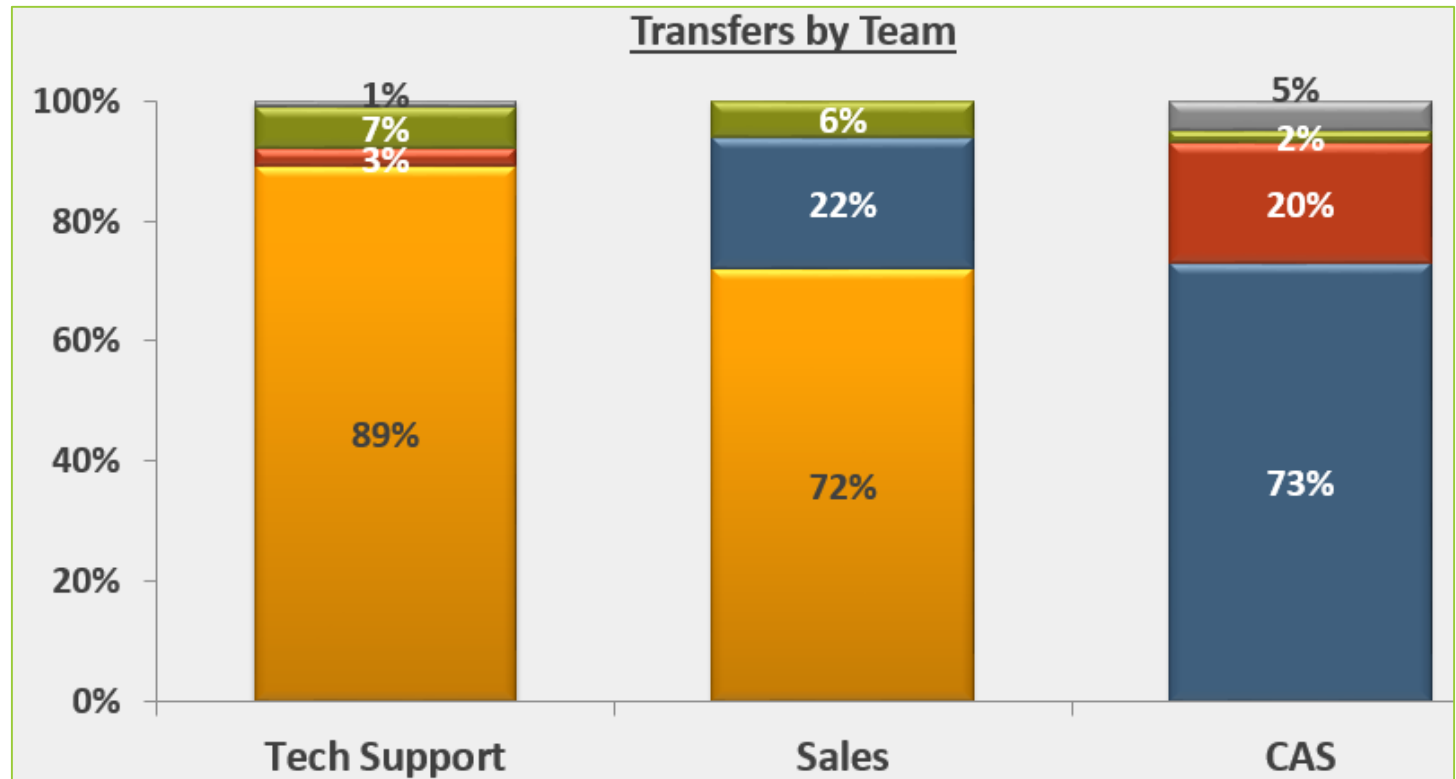


# PROJECTS EXAMPLES

- ☐ Phone Tree Project at Symantec
- ☐ SaaS Security Project at Palo Alto Networks
- ☐ User Research Projects

# PHONE TREE PROJECT

- When customers called in, almost 75% of calls had to be redirected to another department.
  - Wasted time and resources
  - Unhappy customers



# PROJECT DEFINITION

- ❑ Audience: Web site owners who buy Symantec certificates for their sites
- ❑ Rewrite the phone tree messages to reduce redirects. Help customers asap.
- ❑ Challenge
  - Minimal experience with voice messages
  - Leverage my personal experience with phone trees

# METHODOLOGY

- ❑ Looked at the existing tree. What's wrong? Required knowledge of internal department structure.
- ❑ What problems are customer's trying to solve?
  - Order status
  - Reorder
  - Installation issues
- ❑ Rewrote the message. Made a clearer connection between the phone tree choices and the problems customers typically want to solve.
- ❑ Short, clear, understandable
- ❑ Encourage callers to use self-serve online tools.

### Current greeting

Welcome to Symantec!

- For questions regarding your pending order, please press 1.
- For technical support, please press 2.
- For sales, please press 3.

### UX recommends

Welcome to Symantec!

- To check [the status of your order](#) or [ask about](#) an order verification issue, **press 1**. If you have an account, you can login and check your order status online.
- For help installing your certificate, creating a certificate signing request, or to talk to Technical Support, **press 2**.
- To order more certificates or talk to a member of the sales team, **press 3**.

### Reasons for the change

- People call to get order status and they don't realize they can get it online as a self-service. We want to reduce this volume.
- People who need help with installation and CSRs are pressing 1, because it's about their "order". They should be calling Support.
- People who don't know what type of certificate to purchase press 1 or 2, but they should really be talking to sales.



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# TESTING PROCESS

- ❑ Wrote script and created an actual recording.
- ❑ Defined some test scenarios. Did hallway testing.
  - ✓ Internal User Experience professionals
  - ✓ Typical users

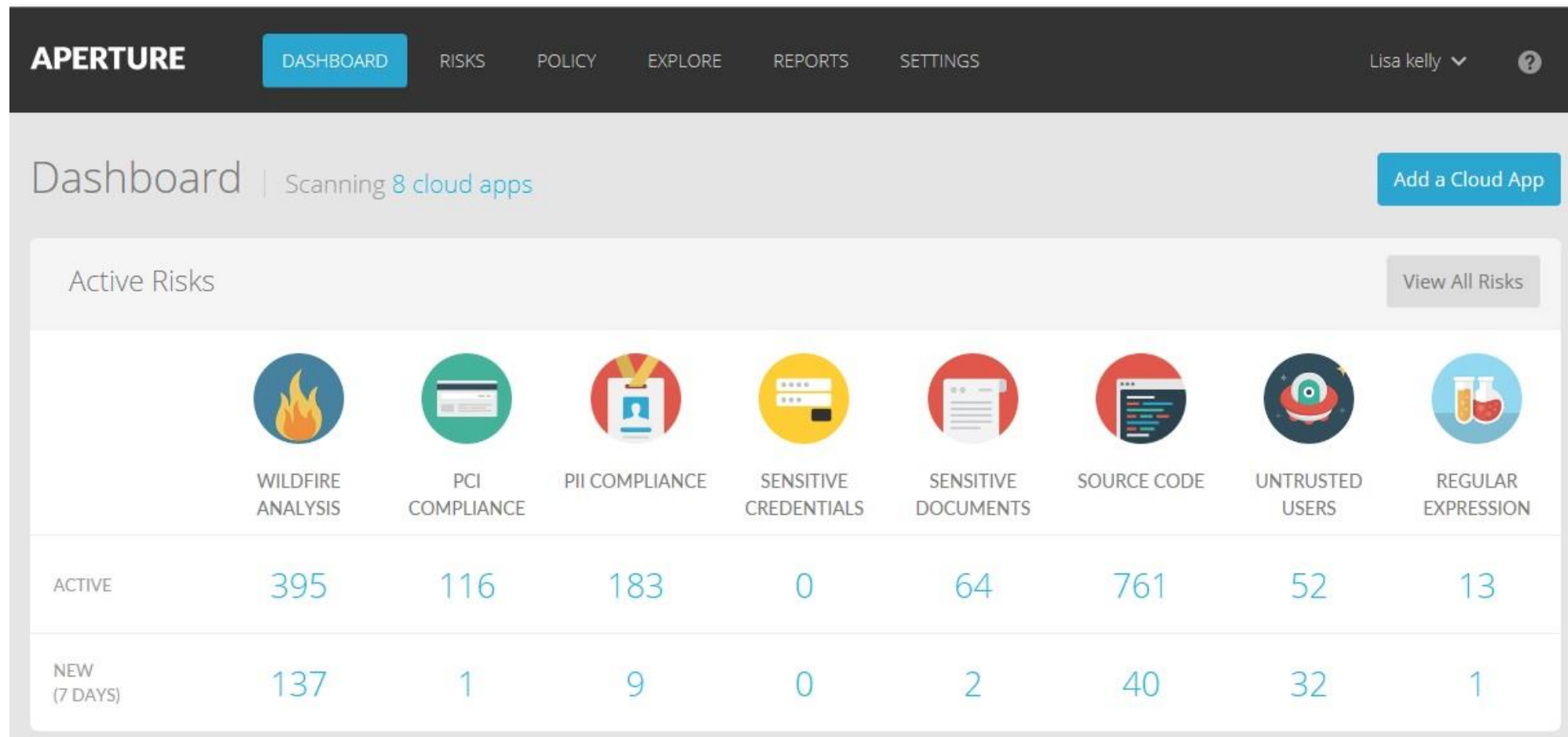
	A	B	C	D
1	Participant	Index	Questions	Option chosen
2		1	You are a new customer has finished your company's CSR two days ago and has not yet heard from Symantec. You need your certificate ASAP. When you call Symantec and hear the phone message, what option do you press?	
3		2	You are a new customer who starts the online order flow but you get stuck on the best options for your startup. You call Symantec to discuss which option works best for your company. When you hear the phone message, what option do you press?	
4		3	You are ordered a certificate, but you received an email from Symantec asking for more information about your company. You're not sure what to provide. When you hear the phone message, what option do you press?	
5		4	You just installed your certificate, but you're not sure it's working correctly. When you hear the phone message, what option do you press?	
6		5	You are the CIO of a mid-size business. You just learned about the new Certificate Transparency guidelines for SSL certificates. You are not sure how this will impact your websites. You call Symantec to learn more about it. What option do you press?	

# RESULTS

- Presented final script, recording to the Cross-Functional teams for rollout.
  - ✓ Sales
  - ✓ Compliance
  - ✓ Support
  - ✓ Marketing
  
- In three months, we reduced redirects by 34%



# EMAIL FOR AUTOMATED REMEDIATION PROJECT









Sort by Severity ▾

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Clear

Show Filters

<input type="checkbox"/>	EXPOSURE	FILE		RISK SUMMARY							RISK FOUND		
<input type="checkbox"/>	Public	 cryptolocker.exe Juan Lei		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	01/05/2017	Email	Dismiss
<input type="checkbox"/>	Public	 Safety Record.doc.exe Juan Lei		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	09/16/2016	Email	Dismiss
<input type="checkbox"/>	Internal	 Locky.exe alex abdi		<input type="radio"/>									

### SaaS Applications

- Box
- Dropbox
- Microsoft Office 365
- Salesforce
- Slack ...

# PROJECT DEFINITION

- ❑ Audience: IT Professionals are responsible for network security
- ❑ Goal: Encourage users to recognize and remediate their own risks.
  - Increase product adaptation.
  - Help the product to “scale.”
  - Educate users about security within SaaS applications.
- ❑ Challenge:
  - Users may not be familiar with the product or how it works.

Send
To... Bill Martin
Cc...
Subject Attention Needed - Security Policy Violation!



Hello Bill Martin,

We have found security issues with files you have in the cloud. See report below. In some cases, action was taken automatically to reduce risk. In other cases, **your attention is needed**. Please review the report and take the recommended action.

If you have questions, contact your SaaS Security Administrator at [admin@paloaltonetworks.com](mailto:admin@paloaltonetworks.com), or refer to our [Security Policies](#).

We appreciate your help to make our network secure!  
The SaaS Security Team

### Recommended Actions

FILE OR FOLDER	ISSUE	RECOMMENDED ACTION
<a href="#">accounts1016.doc</a> Box	Sensitive Content - Sales	Please remove public links on this file or folder.

### Actions Taken

FILE OR FOLDER	ISSUE	ACTION TAKEN
<a href="#">Accounts</a> Box	Credit card numbers (1 file) Company confidential (80 files)	Public link removed
<a href="#">customer-matrix.xls</a> Box	Credit card numbers	Public link removed

# METHODOLOGY

- Add a meaningful subject line with a call to action.
- Include “known branding” to assure users it’s not spam
- Make it personal. Send to an individual, not a group.
- Keep it short.
- Provide links for more information.
- Include a contact address for follow-up questions
- Thank them for their time.

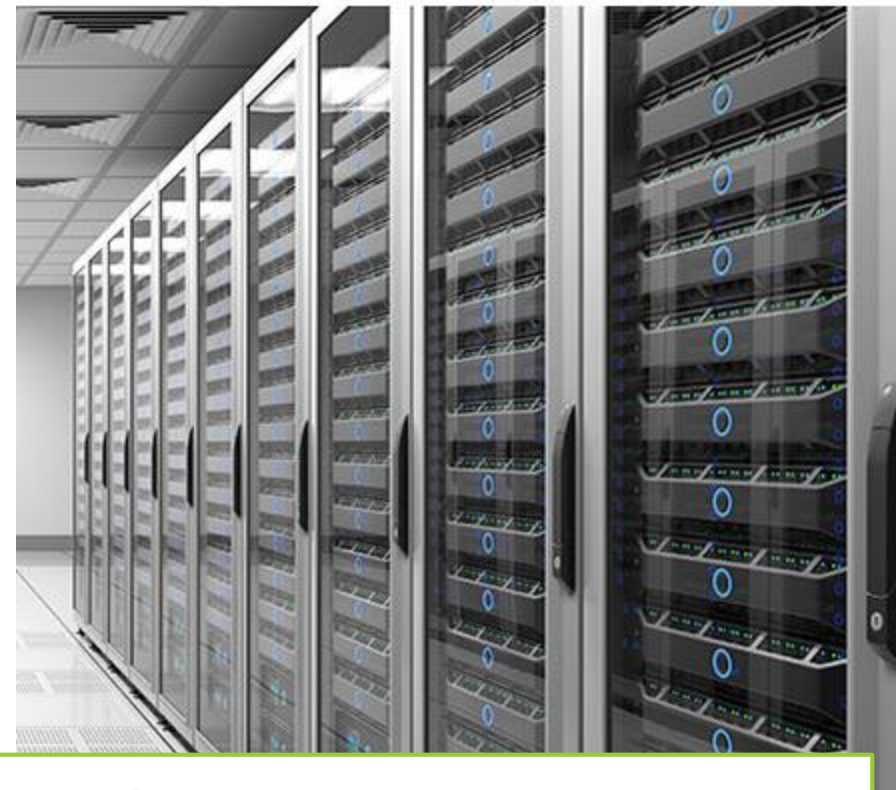
# USER RESEARCH PROJECTS

- ❑ Cluster Design for Certificate Intelligence Center (CIC)
- ❑ Certificate Discovery Alternatives – Survey Monkey
- ❑ Research Summary for CIC – Top Ten Issues

# CLUSTER DESIGN FOR CIC

## Popular configurations we need to support

- Load balancers
  - All but one participant indicated they used F5 load balancers
  - A few also had Citrix NetScaler
  - All but one participant installs their certificates on both the load balancer and the machines behind the load balancer.
  - Many have support for Active/Standby failover
- Virtual hosts that share the same IP address.
- Standard multi-host clusters with a variety of:
  - Operating systems (Windows, Linux, AIX)
  - Web servers (IIS, Apache HTTP, Apache Tomcat, WebS

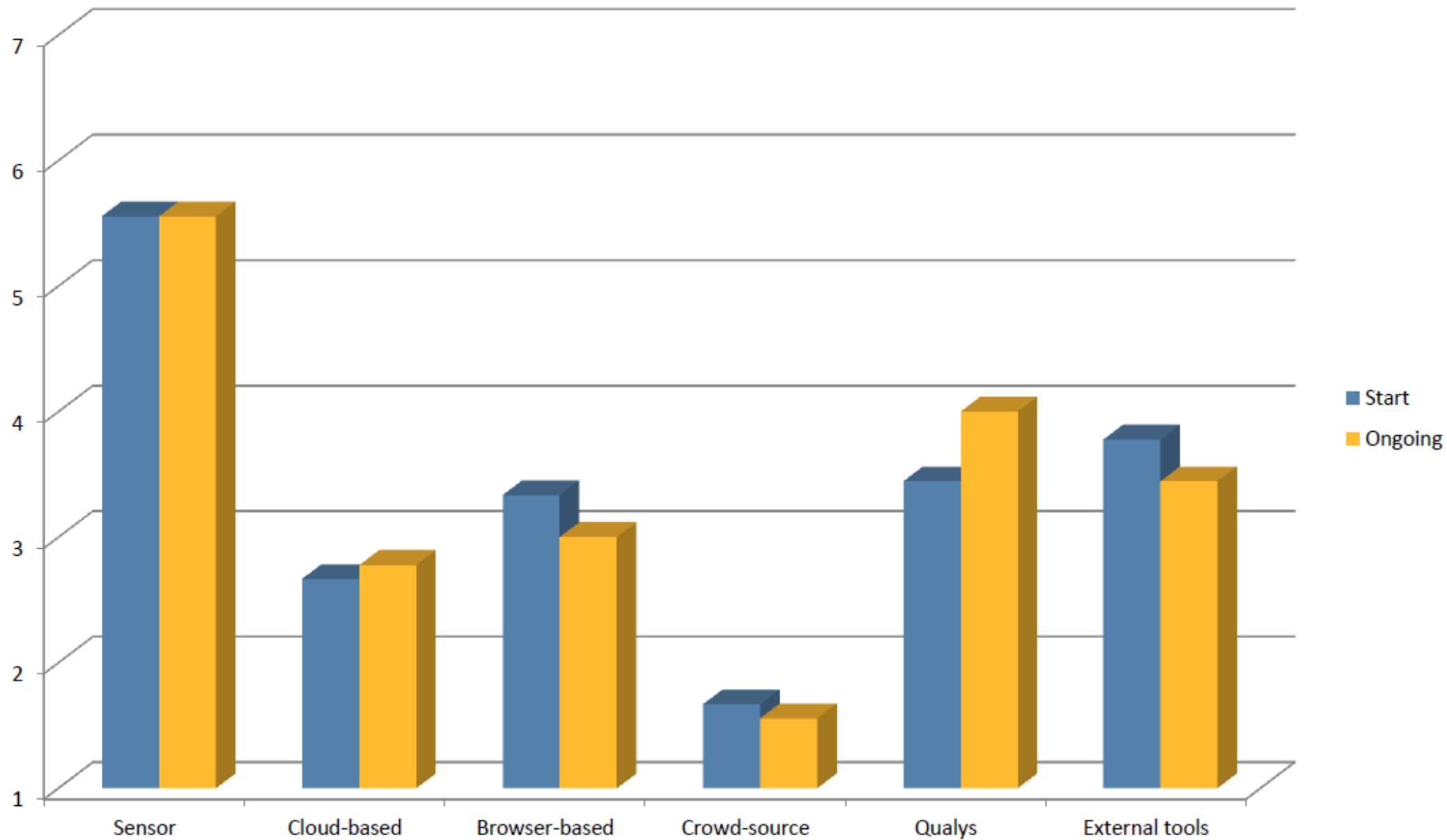


## Happy cases we need to support

Universal interest and desire for the following features:

- Renewal/Transfer automatically on all hosts in a cluster.
- View status during a transfer/renewal.
- Notifications for success/failure.
- Fix automation issues before starting transfer/renewal.

# Alternatives for certificate discovery - Summary scores





# TOP TEN ISSUES

- Issue 1: Performance and reliability
  - CIC is slow and difficult to troubleshoot.
- Issue 2: Complicated setup
  - CIC is difficult to deploy.
- Issue 3: Too many unused options, features. Valuable features not discovered.
  - The CIC interface is cluttered and hard to maintain. Customers can't find what they need to help them do their jobs.
- Issue 4: Workflow problems
  - Many common tasks are split between multiple interfaces (MSSL, CIC GUI, CIC CLI).
- Issue 5: Lack of useful data, reports
  - Users have trouble creating and distributing the reports they need.
- Issue 6: Communications issues
  - Users often don't understand CIC benefits. They are not motivated to deploy.