

Dovetail Research Report

Selina, Helen, Tracy

Study Overview

What is Dovetail ?

Dovetail is an online tool that helps companies better understand their customers. **It collects feedback from interviews, surveys, and support chats, then organizes and highlights important patterns.** This makes it easier for teams—like marketing, product, and customer support—to see what customers really need, so they can make smarter decisions and improve products or services. You don't have to be a researcher to use it—it's built for anyone who wants to learn from customer feedback.

Where Dovetail fits

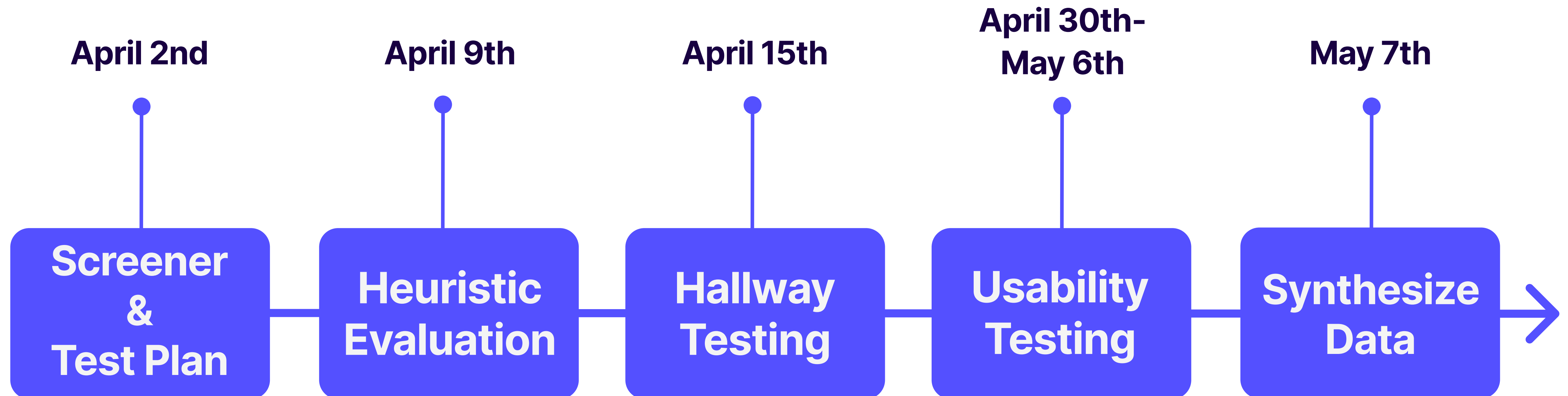


Study overview

In order to improve the workspace for the target audience of dovetail – designers and design researchers – we started a month-long project. From April 2nd to May 7th, we made a series of improvements and tested the usability of the dovetail website.

Process/Methodology

Project Timeline



Recruiting Screeners

- We used **Google Form** to recruit participants and to **survey participants demographic**
- Schedule in-person/zoom usability testing sessions

Dovetail

Thank you for your interest in participating!
We're a group of students working on a school project exploring the use of AI in research tools like **Dovetail**. This short questionnaire will take approximately **10–15 minutes** to complete. Your responses will help us identify potential participants for a follow-up session to inform future product directions.

myanhtrg@cca.edu [Switch account](#)

Not shared

What is your name?

Your answer

What is your age group?

Under 18

18–24

25–34

35–44

45–54

55+

Which industry do you work in? *(Select the closest match, based on past or current experience)*

Technology

Education

Healthcare

Finance

Government / Public sector

Non-profit

Consulting / Agency

E-commerce / Retail

Media / Entertainment

What is your profession? *(Select all that apply)*

UX Designer

UI Designer

Design Researcher

Product Designer

Product Manager

Other: _____

What research methodologies are you proficient with? *(Select all that apply)*

User interviews

Usability testing

Surveys or questionnaires

Contextual inquiry / field studies

Diary studies

A/B testing

Card sorting

Focus groups

Heuristic evaluation

Competitive analysis

Journey mapping or experience mapping

Data or analytics review

Other: _____

Have you ever used AI tools in your research projects?

Yes

No

Other: _____

What tools do you currently use for research projects? *(Select all that apply)*

Dovetail

Participant Profiles

- We also recruit <1 year of experience researchers as we want to optimize for broader group of users too

Field	UX, researchers, interviewers, product designers
Dovetail Usage	infrequently /moderately/very often
Experience	1+ year professional experience
Age range	22-59
Language	English (preferred)
Tech comfort	Familiar with zoom, laptops, knows and uses Dovetail
Mindset	Critical, pay attention to details, open-minded
AI Opinions	Can be familiar or not familiar with AI tools but should be interested

Heuristic evaluation

Heuristic evaluation

We evaluated **Dovetail's** platform's navigation and information architecture to see has it been logically designed and organized



Nielsen Norman Group
Heuristic Evaluation Workbook

EVALUATOR: Selina Wang
DATE: Apr 9, 2025
PRODUCT: Dovetail
TASK: Main screen's interface

1
Visibility of System Status
The design should always keep users informed about what is going on, through appropriate feedback within a reasonable amount of time.

- Does the design clearly communicate its state?
- Is feedback presented quickly after user actions?

Issues
For first-time users, there are no clear instructions or guidance.

Recommendations
Add simple guidance before star to use.

NIENGROUP.COM NN/g

Nielsen Norman Group
Heuristic Evaluation Workbook

3
User Control and Freedom
Users often perform actions by mistake. They need a clearly marked "emergency exit" to leave the unwanted action without having to go through an extended process.

- Does the design allow users to go back a step in the process?
- Are exit links easily discoverable?
- Can users easily cancel an action?
- Is Undo and Redo supported?

Issues
It does not have a specific back button, when I need to go back, it goes back to the first page.

Recommendations
Add a back button.

4
Consistency and Standards
Users should not have to wonder whether different words, situations, or actions mean the same thing. Follow platform and industry conventions.

- Does the design follow industry conventions?
- Are visual treatments used consistently throughout the design?

Issues
We have the home and the ask or research sections, they have almost the same functions.

Recommendations
Eliminate unnecessary sections.

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5
Error Prevention
Good error messages are important, but the best designs carefully prevent problems from occurring in the first place. Either eliminate error-prone conditions, or check for them and present users with a confirmation option before they commit to the action.

- Does the design prevent slips by using helpful constraints?
- Does the design warn users before they perform risky actions?

Issues
No. When I goes back, I cannot find the information history again.

Recommendations
Add a notification bar before came back.

6
Recognition Rather Than Recall
Minimize the user's memory load by making elements, actions, and options visible. The user should not have to remember information from one part of the interface to another. Information required to use the design (e.g. field labels or menu items) should be visible or easily retrievable when needed.

- Does the design keep important information visible, so that users do not have to memorize it?
- Does the design offer help in context?

Issues
Not really, I did not see any important information stands out.

Recommendations
Add a information notification bar before came back.

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7
Flexibility and Efficiency of Use
Shortcuts – hidden from novice users – may speed up the interaction for the expert user such that the design can cater to both inexperienced and experienced users. Allow users to tailor frequent actions.

- Does the design provide accelerators like keyboard shortcuts and touch gestures?
- Is content and functionality personalized or customized for individual users?

Issues
It does not show it clearly.

Recommendations
Add a clear instruction.

8
Aesthetic and Minimalist Design
Interfaces should not contain information that is irrelevant or rarely needed. Every extra unit of information in an interface competes with the relevant units of information and diminishes their relative visibility.

- Is the visual design and content focused on the essentials?
- Have all distracting, unnecessary elements been removed?

Issues
Not really, the main search bar is located in a bunch of illustrated figures.

Recommendations
Delete some unimportant information.

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Heuristic Evaluation Workbook

9
Help Users Recognize, Diagnose, and Recover from Errors
Error messages should be expressed in plain language (no error codes), precisely indicate the problem, and constructively suggest a solution.

- Does the design use traditional error message visuals, like bold, red text?
- Does the design offer a solution that solves the error immediately?

Issues
No, just a pop-up screen.

Recommendations
Let it be more obvious.

10
Help and Documentation
It's best if the system doesn't need any additional explanation. However, it may be necessary to provide documentation to help users understand how to complete their tasks.

- Is help documentation easy to search?
- Is help provided in context right at the moment when the user requires it?

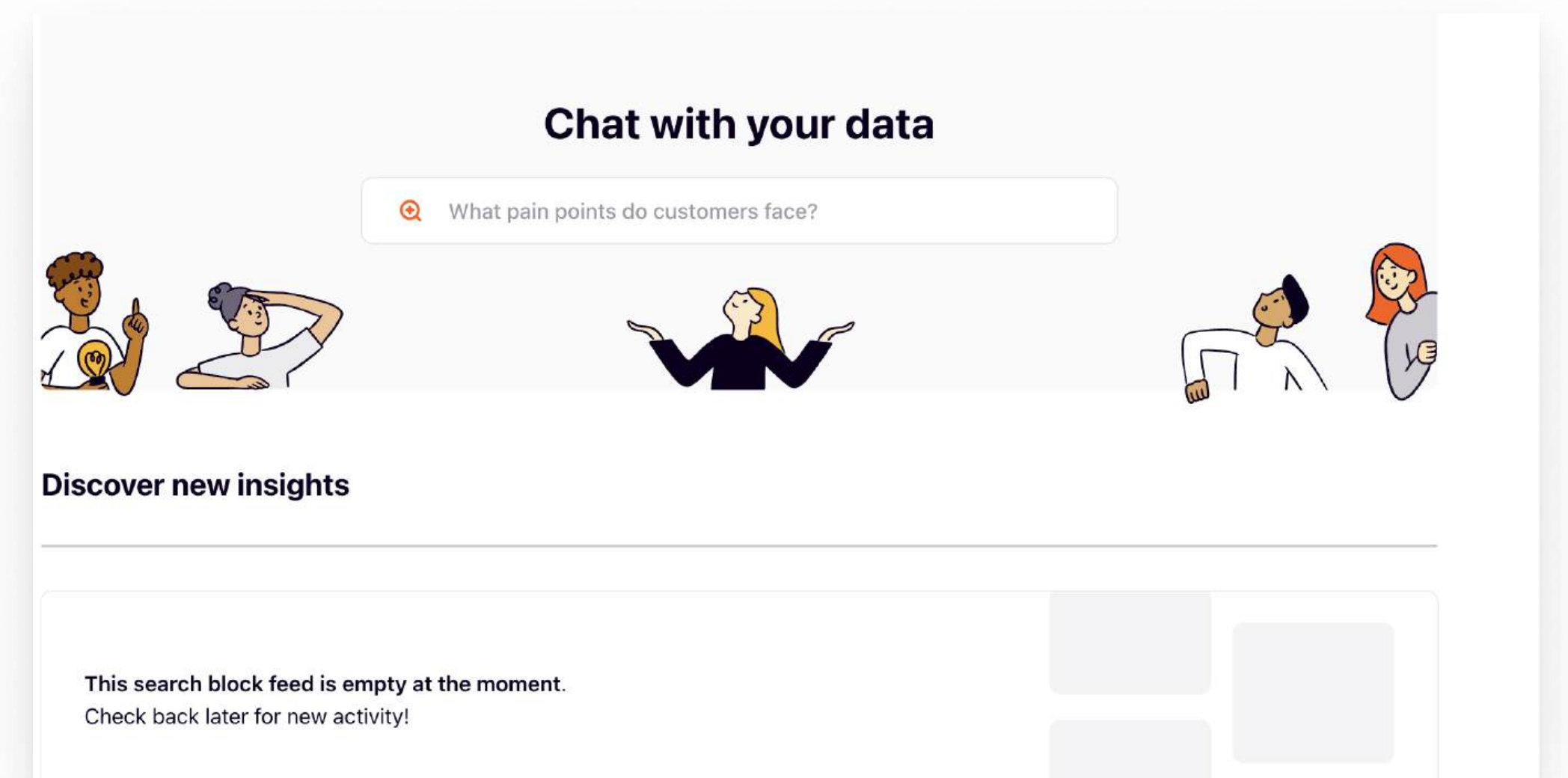
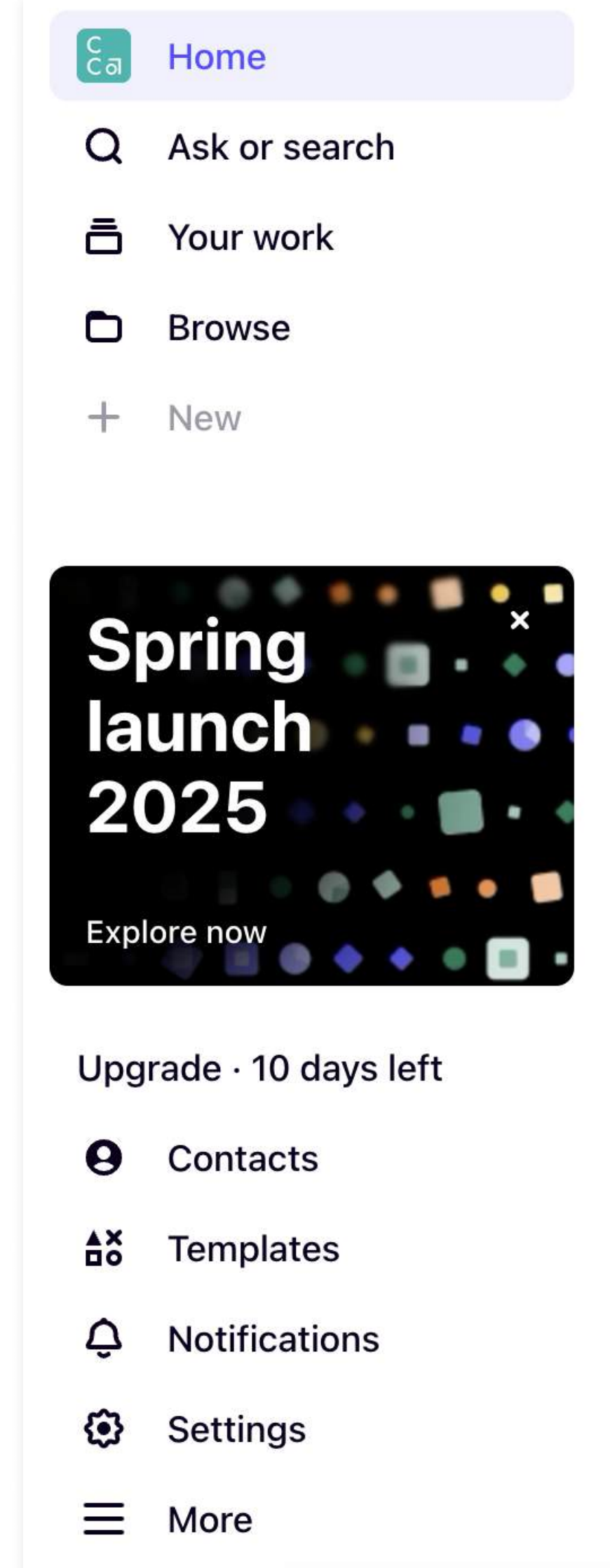
Issues
Not useful at all.

Recommendations
Let it to be more clear, and easily get to what user need.

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Key findings

1. Lack of clear information/features on the Homepage
2. Unclear Activation Conditions for Key Features
3. Unorganized Information Architecture



Competitive Analysis

1. Clear Onboarding & Guidance



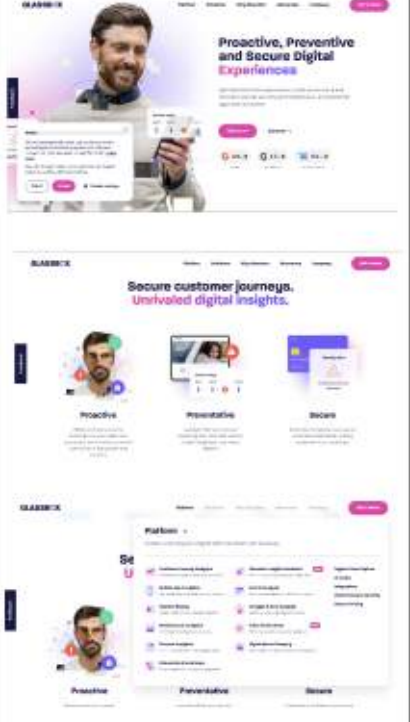
All three platforms provide intuitive onboarding processes or tooltips to guide new users

2. Navigation

Competitors organize core functions with clear labels and consistent layouts.

3. Centered Dashboards

Each platform places user projects or research studies at the front, making it easy to view, organize, and jump into recent work.

Name of Competitors	Screenshots	Features	Design Strengths	Design Weaknesses	Opportunities
Condens		Home page	<ol style="list-style-type: none"> 1. Have a guidance before start to use. 2. Clear design and simple interfaces. 	<ol style="list-style-type: none"> 1. Focuses mainly on qualitative data 2. I cannot put data directly from another app to Condens. 3. usability testing, or recruiting features 	Add an access to another apps, so users can quickly transfer the data.
Aurelius		data search tag insights	Very easy to import hundreds of notes in seconds and how simple it made finding key insights Document and store research data securely for years and make it easy to access Clear IA	Limited Real-Time Collaboration Learning Curve	Giving a first time guide for the user so they don't need to actively try to figure out everything
GlassBox		<ul style="list-style-type: none"> • Session Replay • Journey Mapping • Heatmaps • Funnel Analysis • Struggle Detection • Performance Monitoring • Voice of Customer (VoC) Integration • AI Insights • Privacy Compliance • Mobile App Support 	<ul style="list-style-type: none"> • Session-focused UI: Very easy to jump into replays and visual journeys. • Data visualization: Clean funnel diagrams, heatmaps, journey maps. • Quick filters: Easy to segment sessions (e.g., by device, location, frustration signals). • Real-time dashboarding: Feels powerful for digital operations teams. • Enterprise-grade: Feels serious, built for large digital teams (e.g., banks, airlines, big retail). 	<ul style="list-style-type: none"> • Heavy UX: Can feel overwhelming at first — so many menus. • Not newbie-friendly: Not super intuitive for first-time or casual users. • Not researcher-friendly: Everything feels built for analytics & ops, not for qualitative deep work. • Customization limited: Dashboards and reports are less flexible compared to newer tools. 	Simplify vocab so that it is easier to navigate for newbie or non-professional UI/UX designers. Update dashboard and UI, make it look less messy and create a short walkthrough video for new users



Opportunities for Dovetail's Competitive Advantage

1 Clarify AI Features

Features like 'Chat with your data' should be explained and demonstrated visually to make their value easy to understand.

2 Improve First-Time User Experience

Unlike Condens and Aurelius, Dovetail's homepage and workflows can be unclear for first-time users, especially without an organization.

3 Reorganize Information Architecture

Making research projects and workspaces more visible, instead of hiding them under categories would better match user expectations. This could help users work faster and feel more satisfied.

4 Leverage Visual Design

Dovetail's clean, modern interface is a strong start. With better grouping of features and clearer visual cues, it could feel even more polished and professional than many competitors.

Hallway Testing & Prototype

Hallway Testing

Storyboard

Sign-up Screen
The fastest way to understand your customer turn calls, docs, user feedbacks into insight, like magic.
get dovetail free book a demo

Screen 1
This is a login screen for a website called Dovetail, it is for researchers and use AI to transcribe videos and give insights

Screen 2
My first project (data) highlights
+ New
NEW?
Do you need a tutorial walkthrough?
YES NO

This is a screen for video interview analyzing feature where AI can analyze user's interview video

Screen 3
My first project (data) highlights
+ New
Step: Create a new project next

This is when you click yes in the popup asking if you need a walkthrough tutorial

Screen 4
My first project (data) highlights
you can connect your clouds
G-Drive
Dropbox
or Upload from your PC
Step 2: upload your file next

The steps are going to appear on user screen

Screen 5
My first project (data) highlights
Speaker A:
Speaker B:
Your video is being analyzed
Step 3: wait for AI to analyze your video next

We hope this guides can make Dovetail more friendly for first time user and newbie researchers

Screen 6
My first project (data) highlights
insights data Analyze
Finished
see other tutorials

"see other tutorials" to explore other features

Linda is a college student. Today's the first time she uses dovetail to help her

However, the user guide isn't clear enough for new users.

Linda spends lots of time to figure out where to upload files her previous projects.

dovetail revised the guide. They add clear actions showing how to use the app.

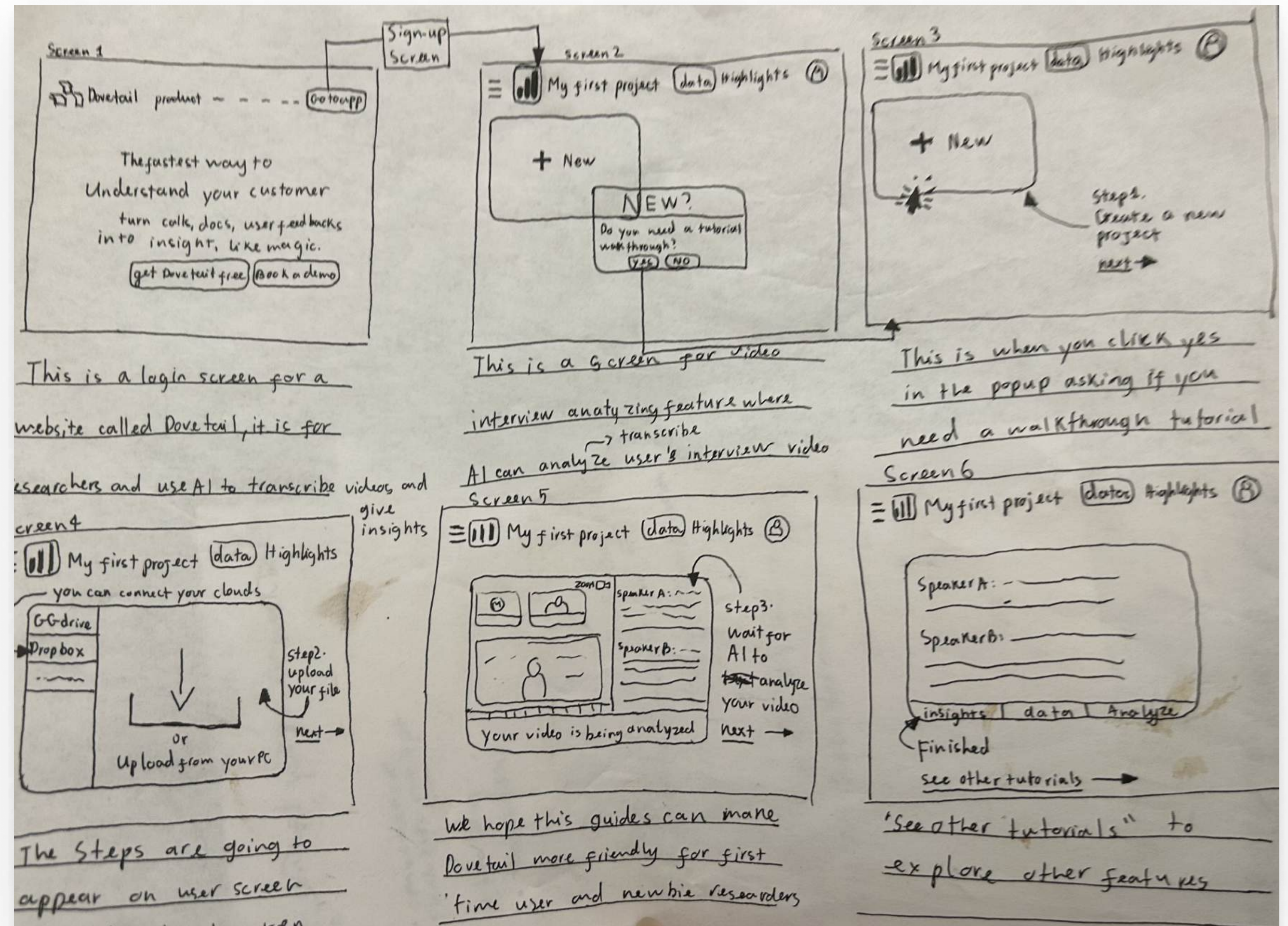
They add an Q&A page too. If users still don't know how to use the app, they can ask for help.

Linda: successfully gets what she wants

Hallway Testing

Storyboard - Concept 1

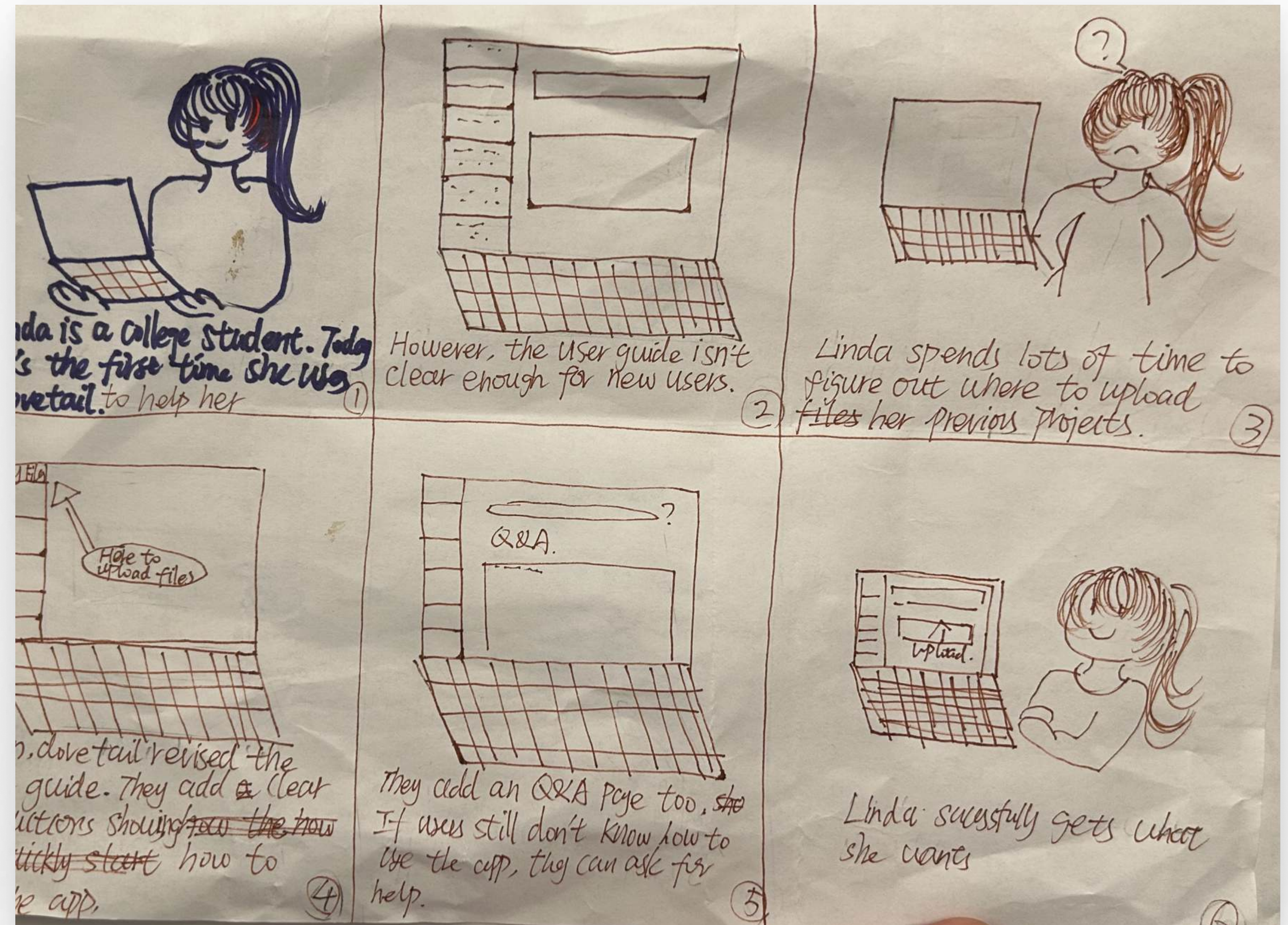
- Add live-walkthrough guide which will show users where to click
- Help users step by step **without having them go find tutorial videos**



Hallway Testing

Storyboard - Concept 2

- Create and re-design the Q&A page
- Incorporated with live-walkthrough option for each article
- Include a link lead to Q&A page in the sidebar menu



Hallway Testing

Final concept

Based on the hallway testing notes, we have decided to:

- **Combine** concept 1 and 2
- Make sidebar menu **well organized** and more **clear wording**
- **Add quick organization change** dropdown to sidebar menu

Bella.
Amira.

①. Combine two ideas.
good.
{ Q&A + Guide => clear.
} quickly understood how it works.

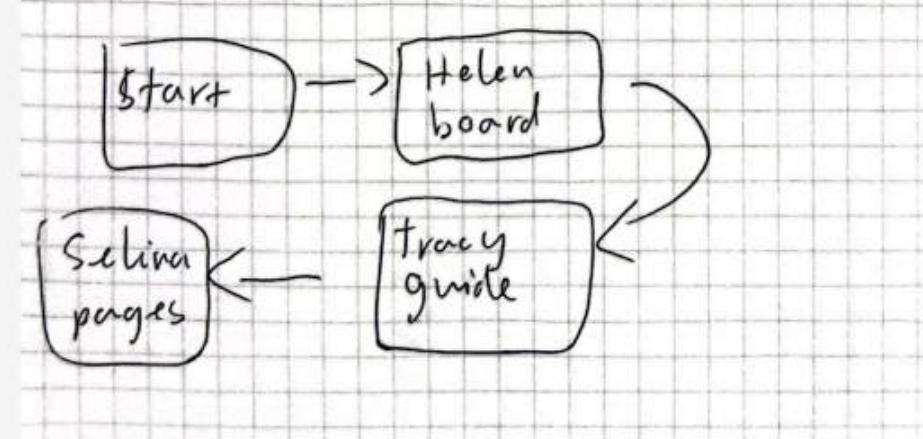
②. Helen.
* Better.
like clean search bar, menus.

③. New use the app before
B _____

P2
- Graphic designer
- never heard of Dovetail

thinks:
Helen idea: great for ^{new} users
(old) existing
too messy for first time users

Tracy + Selina should be combine
recommended flow



```

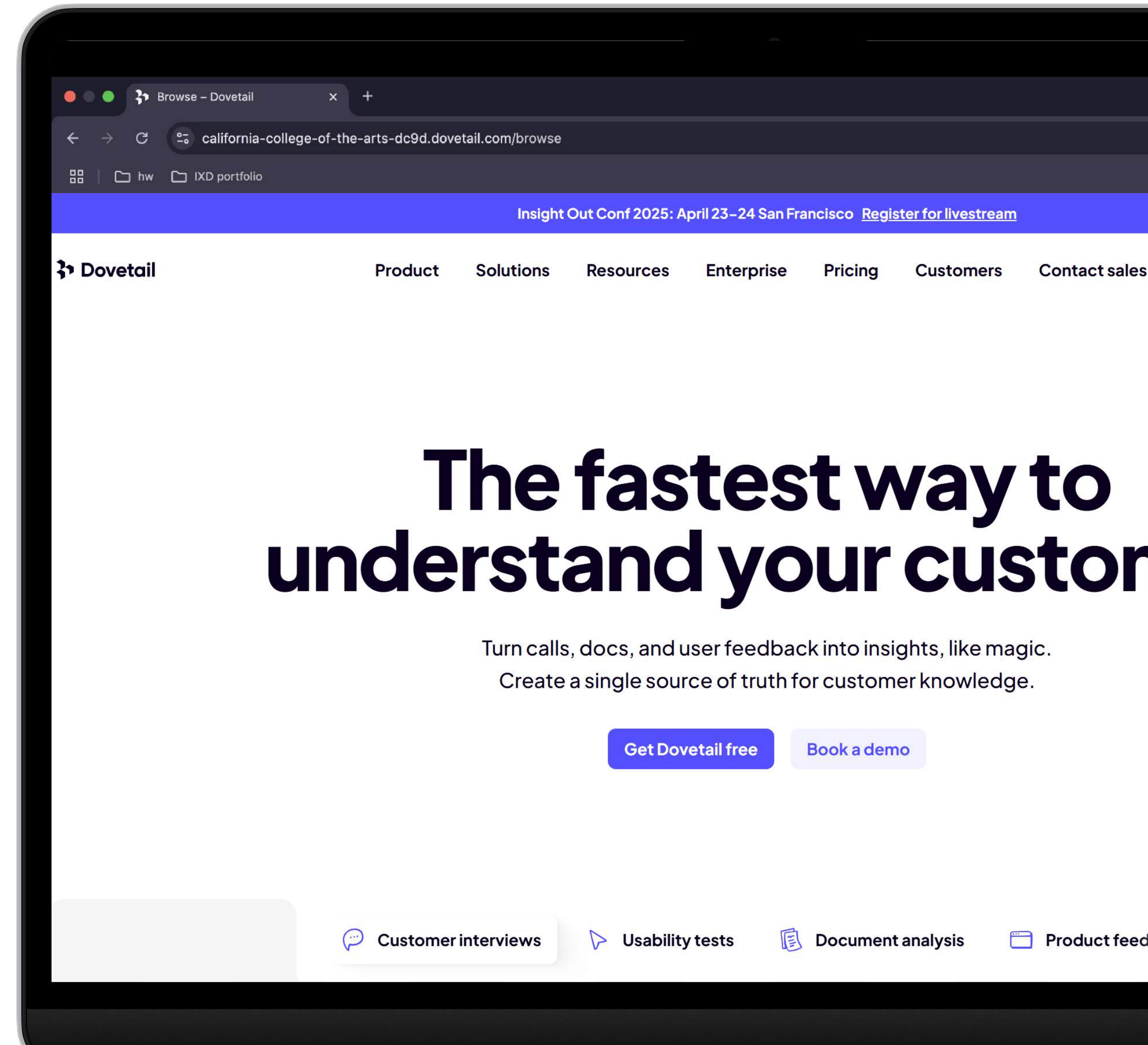
graph LR
    Start([Start]) --> Helen[Helen board]
    Helen --> Tracy[Tracy guide]
    Tracy --> Selina[Selina pages]
  
```

Tracy - P1
- never use Dovetail
- too hard for first time user
navigate

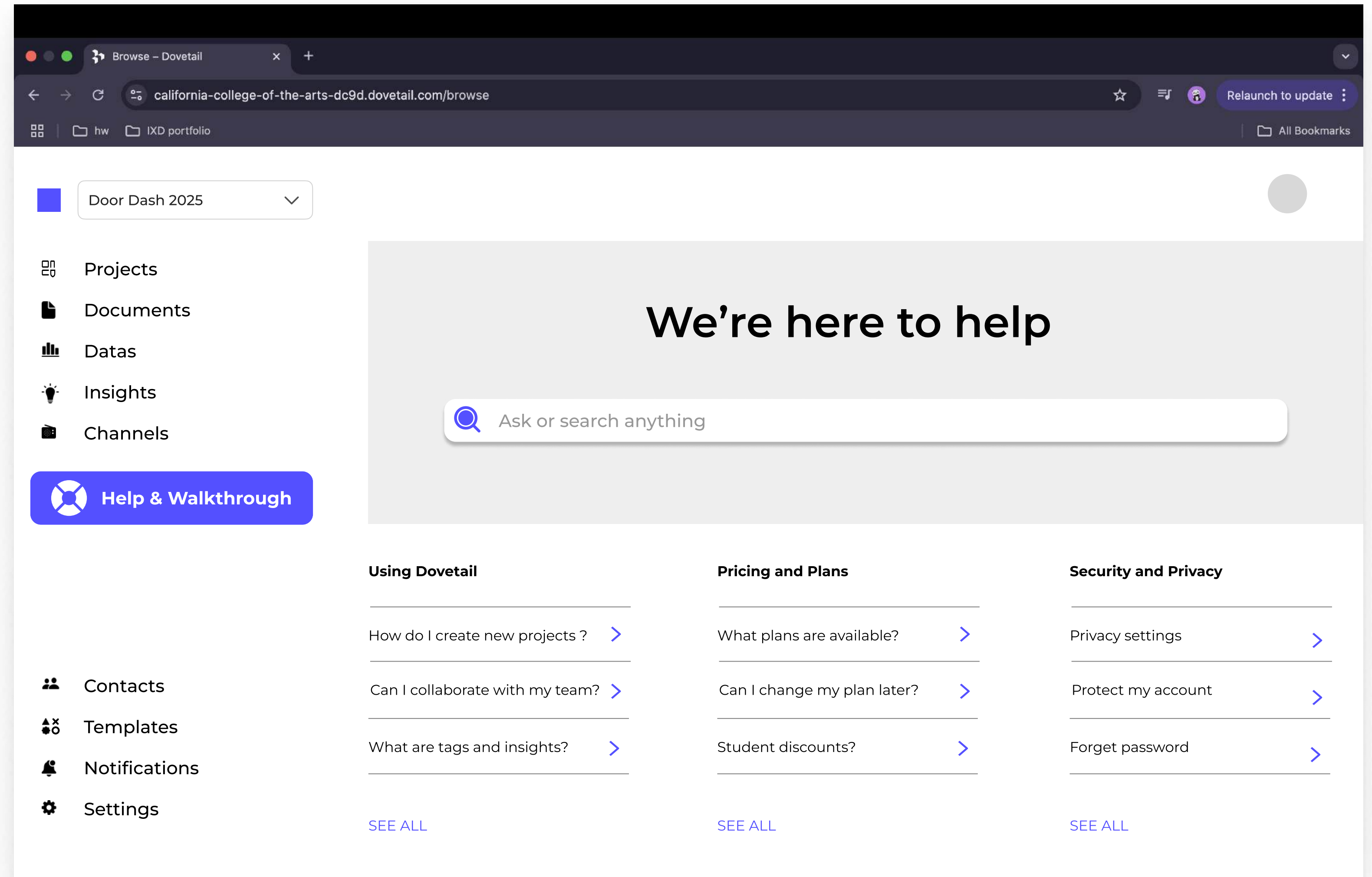
thinks:
Tracy Idea: a bit messy, too many steps
* Helen idea: like most, should change to this layout
Selina: good but needs to be less text

thinks Tracy + Selina combined is great
there should be a search bar

Prototype



Q&A/Homepage

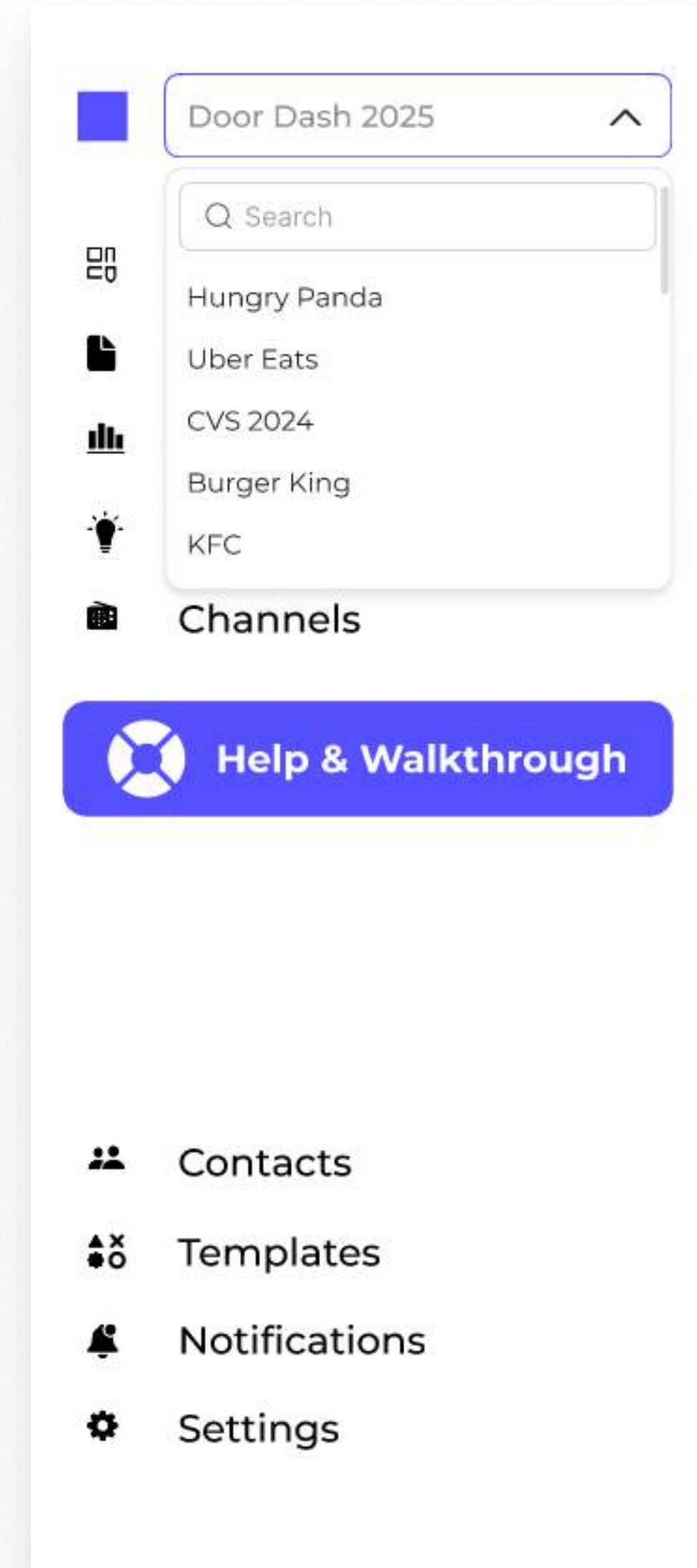
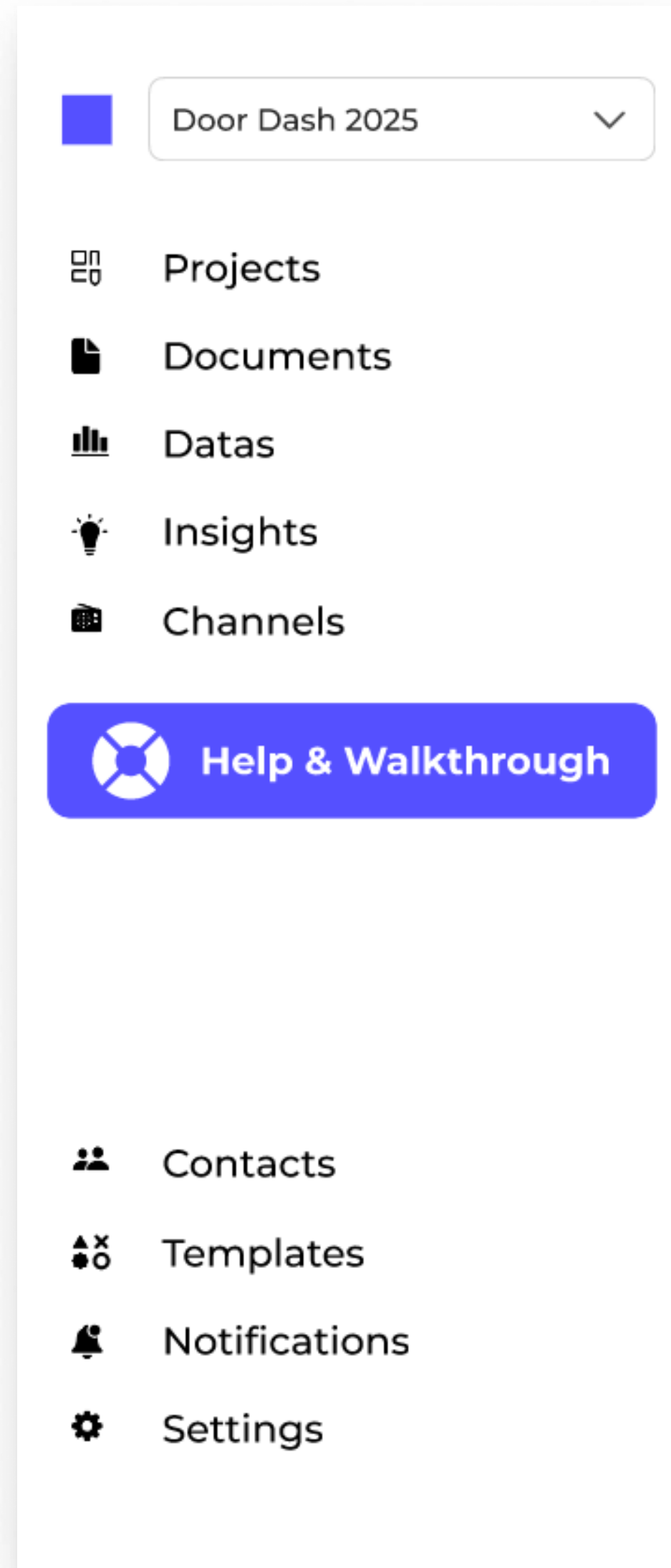


Live Walkthrough



A screenshot of a web browser displaying the Dovetail application. The browser's address bar shows the URL "california-college-of-the-arts-dc9d.dovetail.com/browse". The application interface includes a top navigation bar with a search bar containing the text "Ask or search anything". Below this is a "Projects" section with a large, empty white box. A blue dialog box is overlaid on the screen, containing the text "Welcome to Dovetail ! Do you need a walkthrough guide on starting your first project ?" and two buttons labeled "Yes" and "No". On the left side of the application, there is a sidebar menu with the following items: "Projects", "Documents", "Datas", "Insights", "Channels", "Help & Walkthrough" (highlighted in blue), "Contacts", "Templates", "Notifications", and "Settings". At the top left of the sidebar, there is a dropdown menu currently set to "Door Dash 2025".

Side Menu Redesign



Research Plan

Discussion Guide (usability tasks)

Tasks Summary

Task 1: This is the first time you use dovetail. You want to sign in with your gmail account and go through the live walkthrough

Test the on boarding process and guide features

Task 2: You want to upload a recording of your interview.

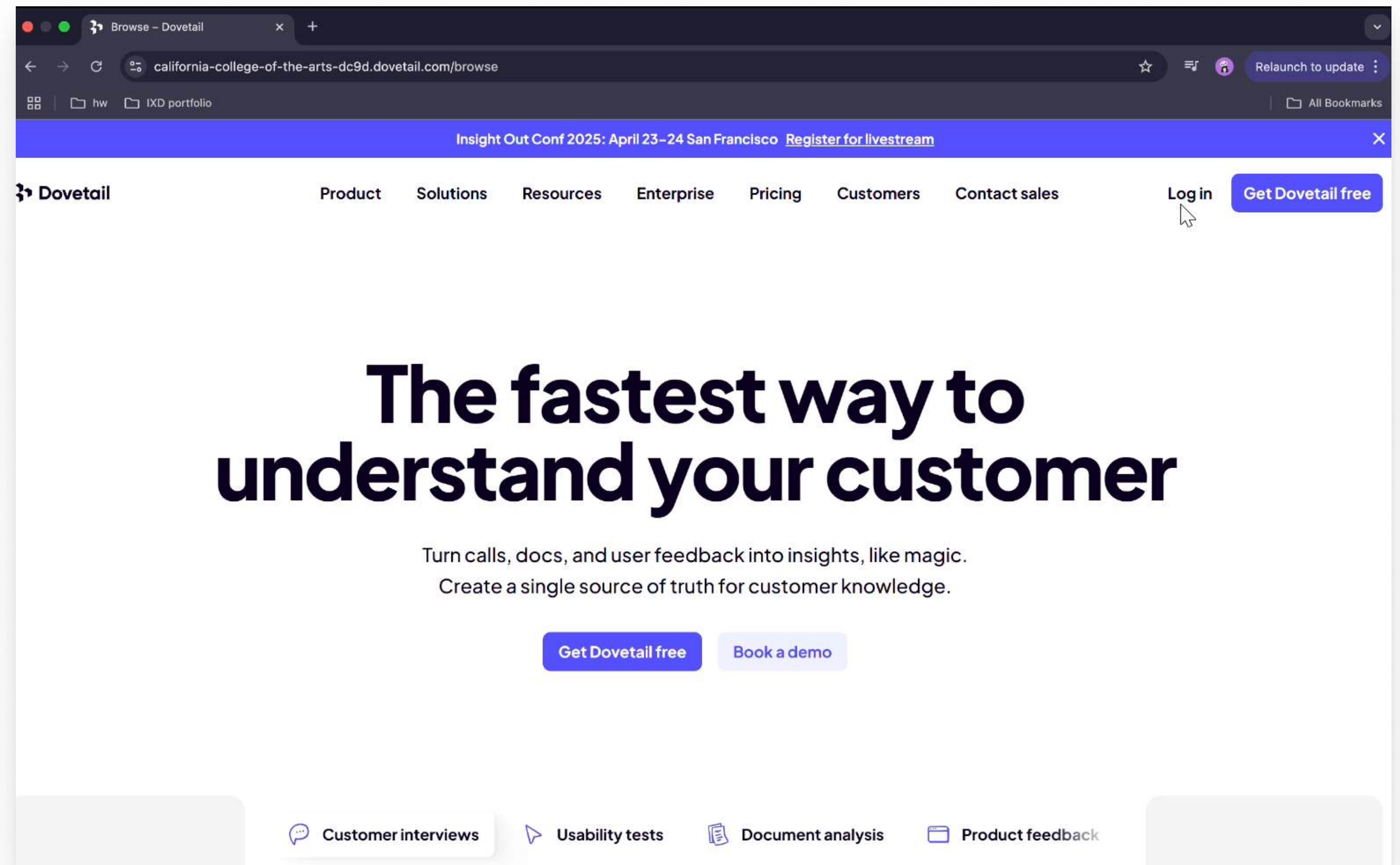
Test the file import feature

Task 3: You are a design researcher that works for multiple companies. Now you just finished your work for the current organization, you want to change to another workspace so you can work with another company.

Test the organization switching feature

Task 1

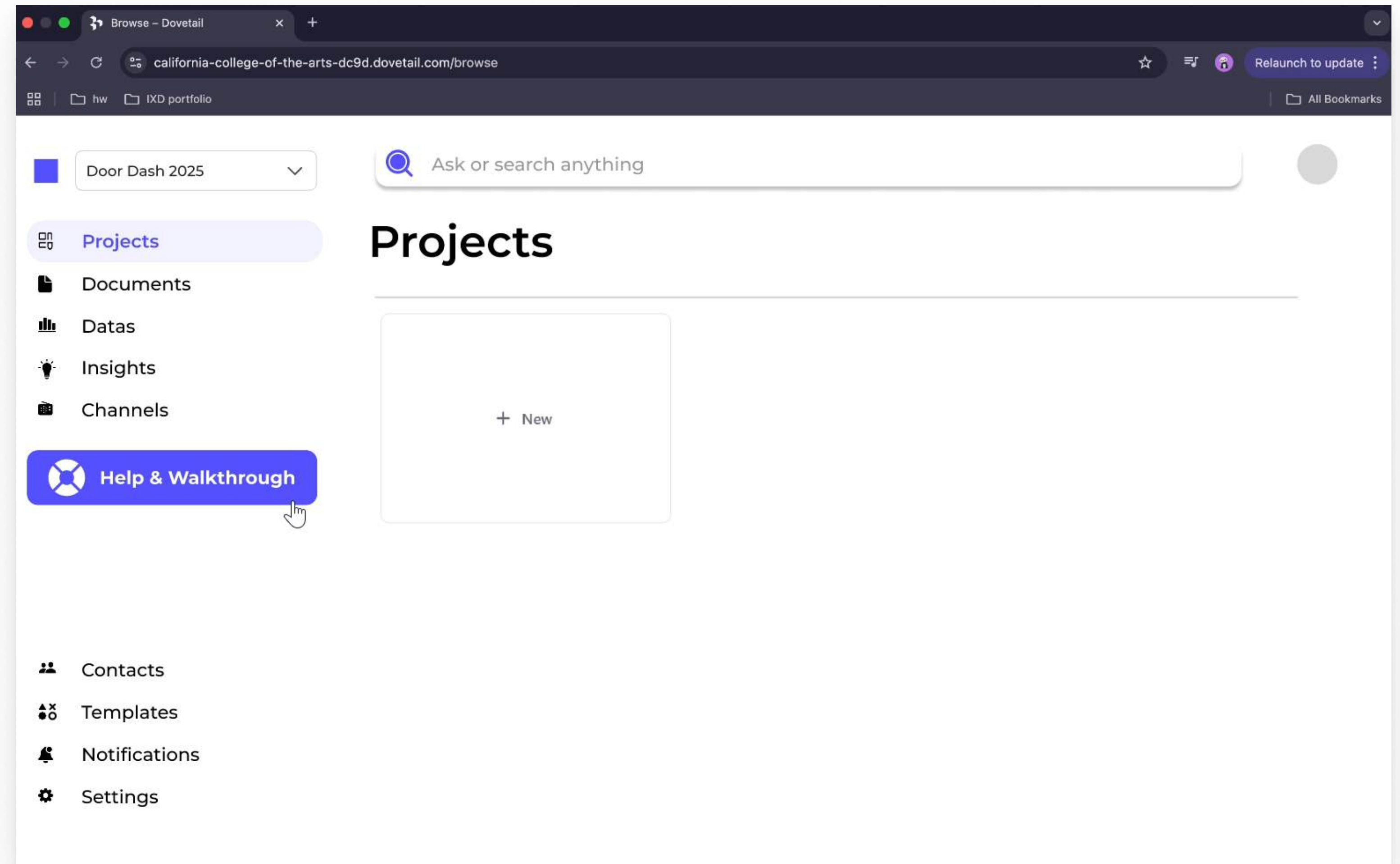
This is the first time you use dovetail. You want to **sign in with your google account** and try out the **live-walkthrough guidance**



Task 2

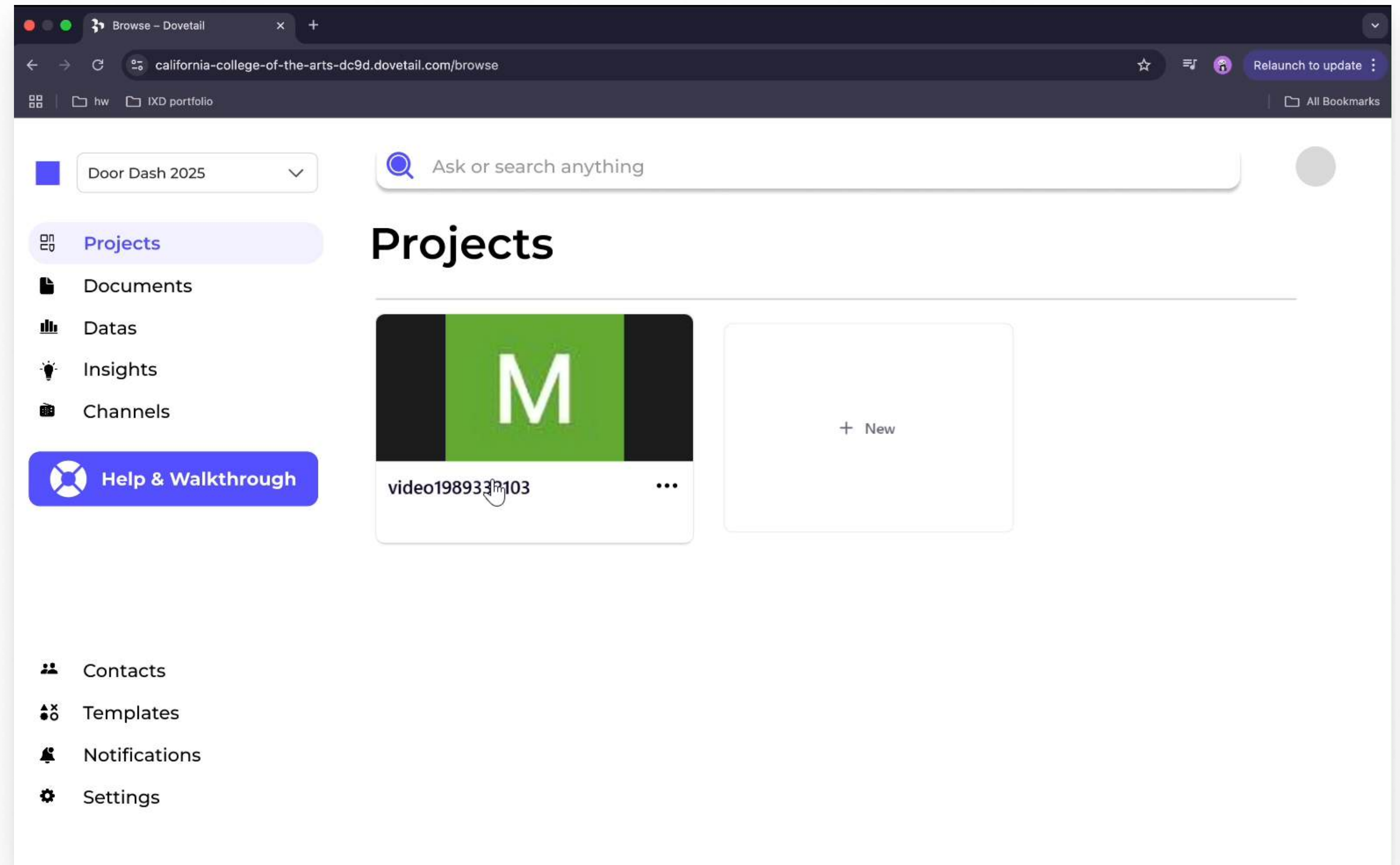
You want to **upload a recording** of your interview.

Try accessing the Q&A page for help



Task 3

You are a design researcher that works for multiple companies. Now you just finished your work for the current organization, you want to **change to another workspace** so you can work with another company.



Test environment, equipment, and logistics

- Platform: Zoom (or in-person in a quiet room).
- Device: Laptop
- Session length: Each session will take about 45 minutes.
Sessions will be recorded for analysis (with participant consent).
- Roles: Moderator and Note-taker
(Notes will be taken during and after each session.)

Report contents and presentation

We will deliver a report including:

- Executive Summary
- Methodology

Findings:

- Themes from qualitative feedback
- Success rates in distinguishing AI vs human content. Average clarity and trust ratings.
- Raw data samples (quotes, observations).

Findings

Tasks

Task 1: This is the first time you use dovetail. You want to sign in with your gmail account.

6/6
All the participant passed this task.

Task 2: You want to upload a recording of your interview.

3/6
Some participants got confused here.

Task 3: You are a design researcher that works for multiple companies. Now you just finished your work for the current organization, you want to change to another workspace so you can work with another company.

6/6 All the participant passed this task

Affinity Cluster

Workplace

"Make workspace switching more obvious."

"Didn't notice the option under my profile."

Maybe the font here is a little bit difficult. It would help if there was a special icon or something clearer to show "company option." That would make it more obvious.

adding a microphone icon or something that tells you, "Hey, I can help walk you through this."

I think it's quite easy to use

visual

it would be better with more visual icons.

"It feels clean and professional."
Helen Chen

But maybe one thing that could be improved is the project names or change tools — they're not very prominent.
If the colors or sizes were larger, it would be clearer.

File category

Maybe it could automatically sort different file types, so you can see them more clearly — like radio files grouped under "radio," images under "image," etc.

I'd add more pre-categorized sections, especially if you have a lot of files

Walkthrough& tutorials

I would prefer video tutorials

"The guide helped me understand what the feature does."
Helen Chen

"I do not really understand what should I do next step."

AI features

It would be good if there was an AI assistant or helper icon that offers recommendations or helps when you seem stuck.
Helen Chen

I'd like a more empathizing AI — something that feels like it's guiding you.
Helen Chen

Maybe something moving or animated would make the AI easier to notice.
Helen Chen

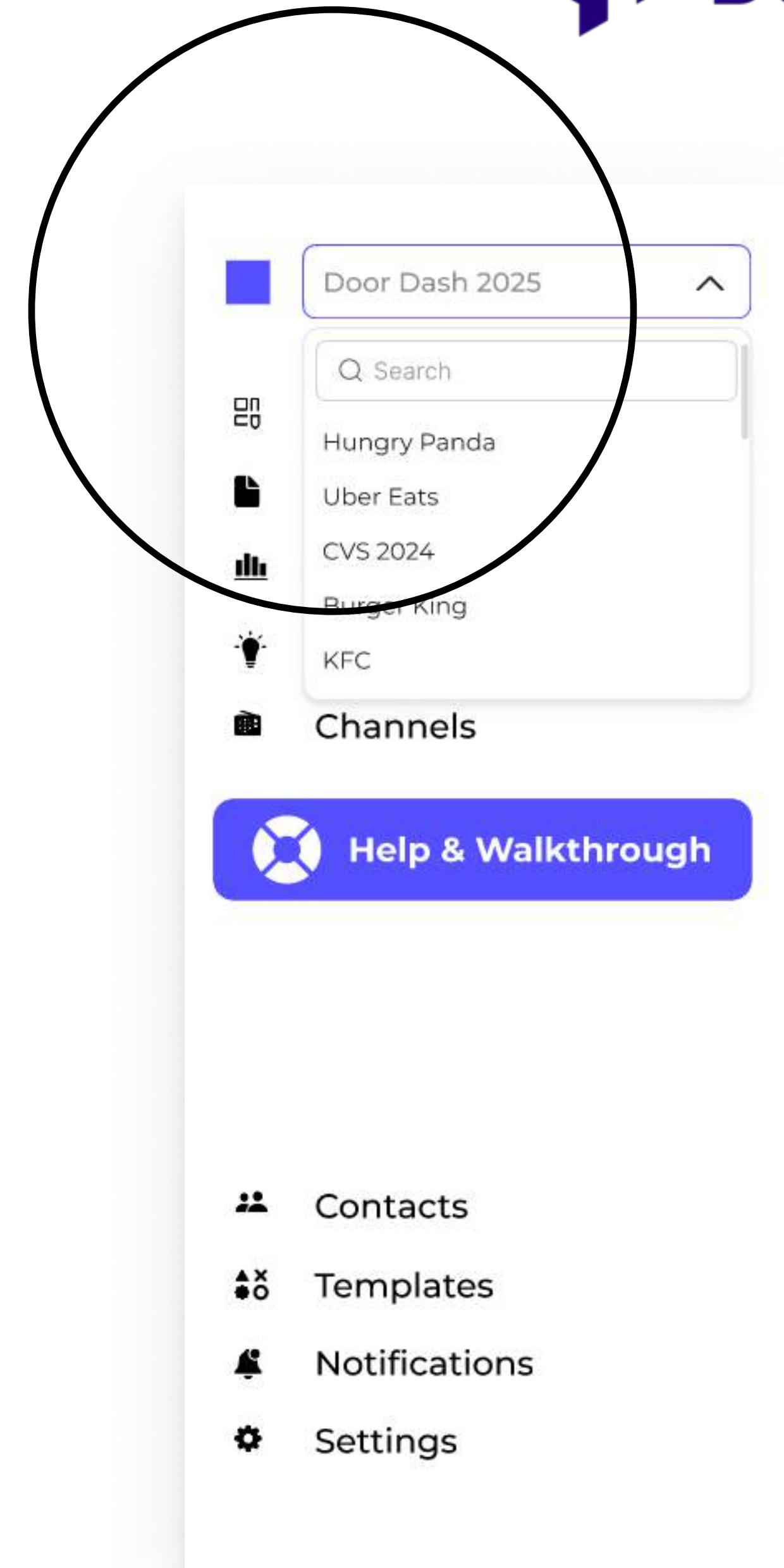
Issues

(3/6) **Workspace switching were unclear.**

The rest of them think it works.

Recommendations

Using a balder typography. Also add 'workplace' above the bar.



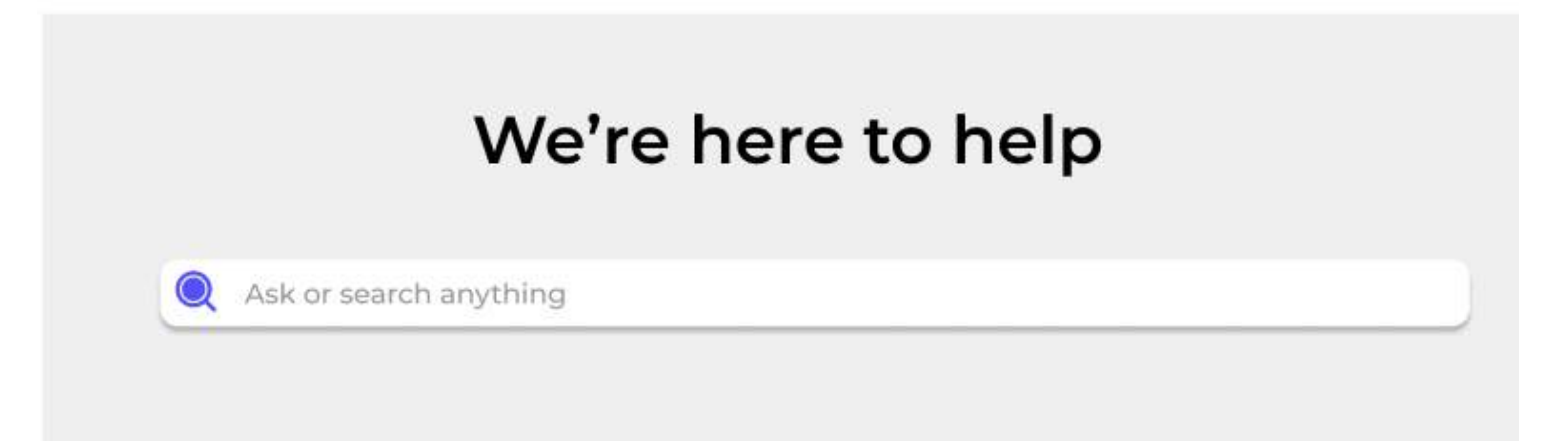
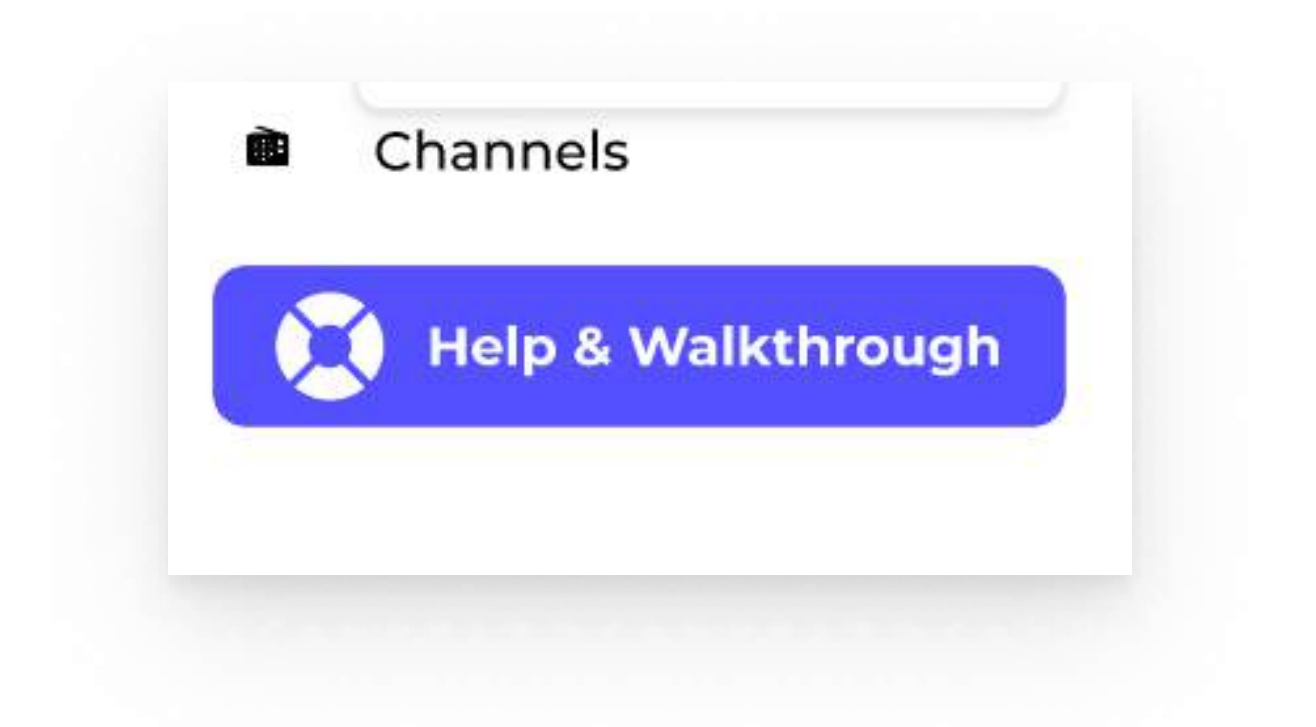
Issues

(2/6) **Not enough visible AI interactions**

The rest of them didn't mention AI features.

Recommendations

Adding an AI assistant chat that offers recommendations or helps when you seem stuck.



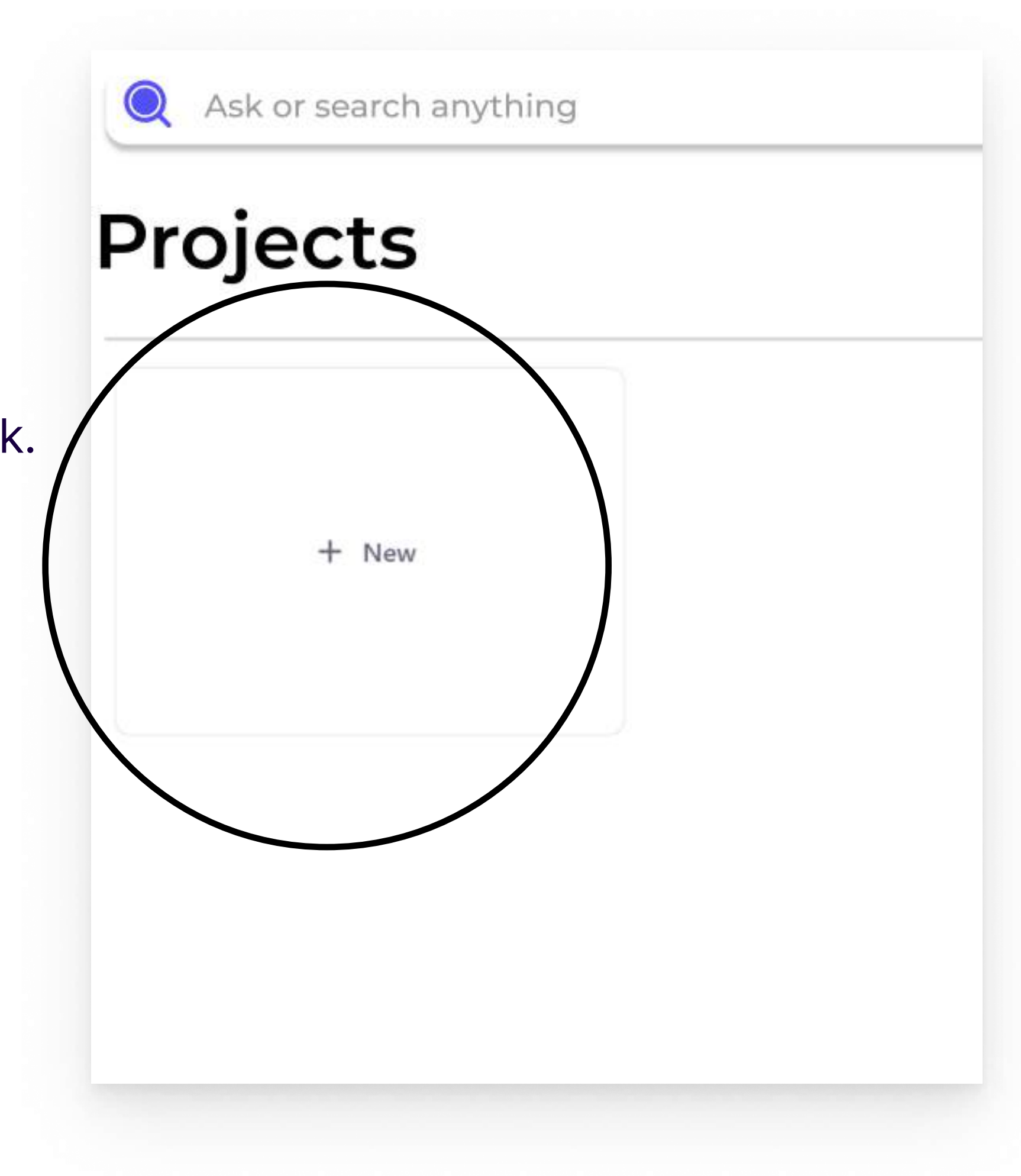
Issues

(4/6) **File upload isn't clear enough.**

The rest of them didn't mention but they all had trouble passing the task.

Recommendations

Move upload feature under the document page instead of projects.



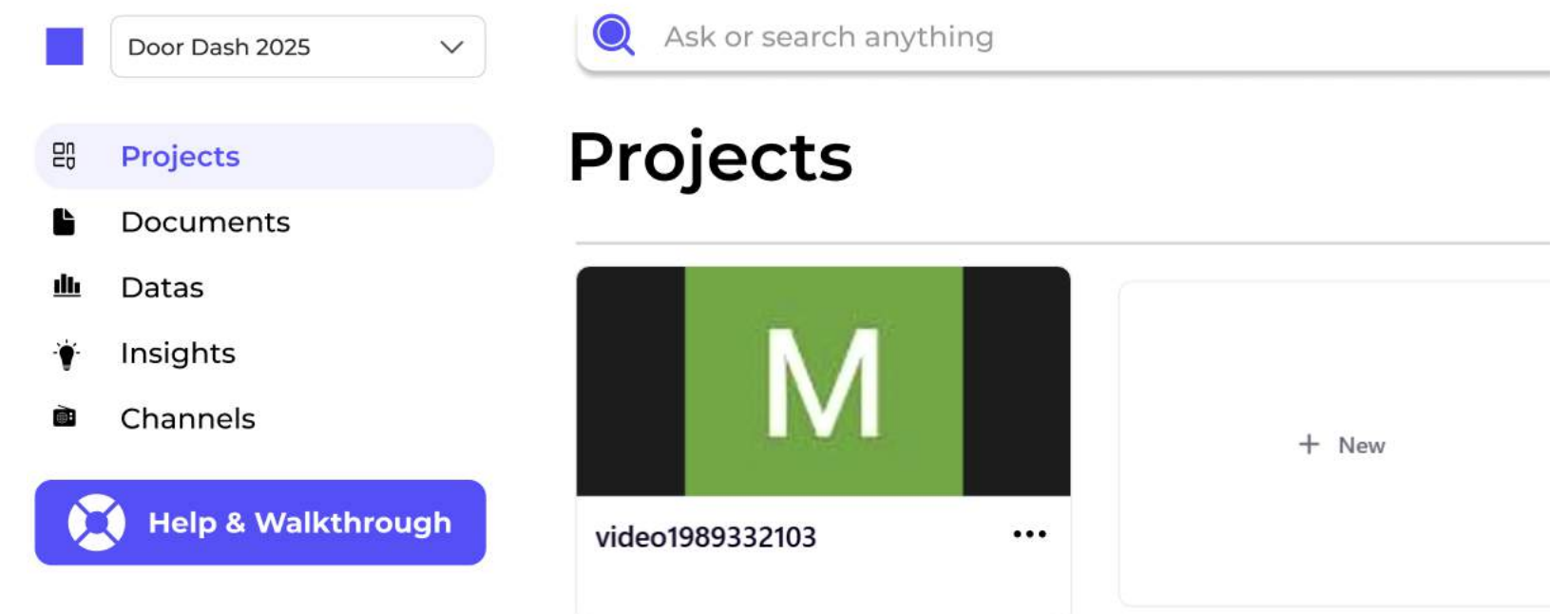
Issues

(2/6) **Lack of sorting or filtering of file types**

The rest of them didn't mention.

Recommendations

Add a categorized board where users can choose file type, upload time, filename and more.



What we did well

- **The overall design was perceived as clean, simple, and professional.**
- **The toolbar was considered well-organized.**
- **Users generally found the navigation clear and intuitive.**
- **Built-in help sections (Q&A, walkthroughs) were appreciated by users when they explored them.**
- **Less learning curve.**

Reflections

If we had more time, we would focus on refining the improvements—especially around onboarding and workspace switching.

We'd also want to:

Conduct more usability tests to validate our design changes.

Interview a wider range of users to gather more diverse feedback

Develop a more polished prototype for higher-fidelity testing

Thank you!