Discussion Guide

Welcome & Introductions (5 min)
Thanks for joining me today! My name is Mick and I'm an independent researcher partnering with Meta to better understand your experiences with communication tools, particularly as Meta transitions from Outlook to Gmail and Google Calendar.

Before we get started, here's a quick overview of the process we'll go through in the next hour:

- As I mentioned, I'm an independent researcher, which means that I wasn't involved in designing any of the tools or features we'll be discussing today - so whether you like or dislike them, either is fine by me! There are no right or wrong answers. I'm just here to learn what you honestly think.
- I know you were informed we'll be recording today's session. Rest assured this recording won't be used outside the context of this study, and your feedback will remain anonymous.
- Lastly, you may notice some colleagues observing the session. They won't interact with you, it will just be the two of us chatting.
- Any questions for me before we get started?

Background Questions (2-3 min)

- Tell me about your role at Meta.
    - What team are you part of, and what are your main responsibilities?
- What does a typical workday look like in terms of communication and scheduling?
    - How much time is spent managing emails vs. meetings vs. other communication?
- How do email and calendar work together in your day-to-day?
- In what ways do you typically access your work email and calendar? E.g., through your browser, an app (such as Outlook app), or something else (e.g. Apple Mail, Apple Calendar)
- Before the migration, how familiar were you with Gmail and Google calendar?
    - Have you used it in personal or prior work settings?

Outlook Email and Calendar Workflow (10 min)
Focus: End-to-end daily workflow, ecosystem of tasks, and how Email + Calendar work together.

Context & Day-to-Day Workflows

- What are the day-to-day tasks you need to accomplish that involve communication, coordination, or managing information?
    - What tools do you use to perform these end-to-end workflows?
    - Are there any integrations you rely on to perform these tasks? (e.g., between mail and calendar tools, chat, etc)
- How do you typically communicate with others?
- How do you schedule meetings or manage your calendar?
- How do you manage and prioritize your work?
- How do you categorize or organize information across your tools?

Core Jobs-to-Be-Done (JTBD)

- What core jobs do you rely on Outlook to help you accomplish?
    - Staying on top of communication
    - Maintaining scheduling efficiency
    - Managing priorities
    - Quickly finding information
    - Categorizing/storing information
- How do these jobs integrate across Outlook Email and Calendar?
- Which tasks require you to move fluidly between email and calendar?

Cross-Tool Workflows

- Describe a recent task where you used email and calendar together.
- How do you use email to plan your time or shape your daily schedule?
- When you receive meeting-related emails, how do you evaluate or respond to them?

Outlook Calendar Workflow (10 min)
Focus: Mental models, scheduling behavior, time management, calendar structure.

Mental Models of Time & Scheduling

- How do you think about time management inside Outlook?
- What mental system do you use for managing your calendar?
- How do you conceptualize busy time vs. focus time?

Calendar Workflows

- Walk me through your process for planning your day or week.
    - How do you evaluate incoming meeting requests?
    - How do you track and manage your meeting load?
    - How do you coordinate with others when scheduling?
    - How do you protect your time (e.g., to focus on core work)?

Calendar Features & Behaviors

- Which calendar features do you rely on most?
    - Categories
    - Colors
    - Recurring meetings
    - Scheduling assistant
    - Shared calendars
- Do you use any conventions or rules when creating events?
- How do you manage overlapping or competing meetings?
- How do you manage calendar invites - both with internal employees and external users?

Finding & Resurfacing Time-Based Information

- How do you use your calendar to locate past or future events?
- How often do you refer back to calendar history for context or decisions?
    - How important is it to reference past calendar invites?

Segment-Specific Workflows & Integrations (10 min)
Focus: Specialized workflows by role, cross-tool connections, and Outlook's role within broader ecosystems.

Role-Specific Behaviors

- Are there workflows specific to your role, team, or department that depend on Outlook?
- How do you collaborate with others who use Outlook differently?

Information-Management Workflows

- Walk me through how you find old messages or information.
- How do you resurface or follow up on messages you can't act on immediately?

Email Practices & Workflows

- What's your typical flow for managing incoming email?
- How do you decide what requires action vs. filing vs. ignoring?

Search Strategies & Organization Systems

- Which tools do you use most (folders, categories, flags, search, rules, shared mailboxes)?
- How do folders fit into your mental model of organization?
- Do you use naming conventions or advanced search patterns?
- Do you use rules or automations? For what purposes?

Cross-App or Role-Based Integrations - What would break your workflow if it disappeared?

- Do you use Outlook in combination with other tools (Zoom, Teams, SharePoint, OneNote, project tools)?
- How do these integrations shape your workflow?
- Are there specific integrations (e.g., Teams, calendars, automations) you depend on?
- What is non-negotiable for your productivity?
- Which workflows break if these integrations aren't available?

Integrations & Feature Reliance (10 min)

Focus: What must be preserved, deep dependencies, and risks of disrupting key behaviors.

Successes, Pain Points & Gaps
What does Outlook do particularly well? Are there tasks Outlook makes unnecessarily difficult?

- Where does Outlook succeed in supporting your workflows or jobs-to-be-done?
- Where does it fall short?
- What friction does it create?
- What workarounds have you developed to compensate for missing functionality?
- Are there tasks Outlook makes unnecessarily difficult?

Critical Needs, Configurations & Dependencies

- Which Outlook features or configurations are essential for accomplishing your work?
- Which workflows or habits are especially important for you to maintain?

Reliability & Trust Factors

- How confident do you feel that Outlook won't lose information or mis-handle important tasks?
- Are there features you trust more than others?

Migration Impact & Change Management (10 min)
Focus: Readiness for Gmail/other systems, risks, required support, and transitions.

Migration Readiness

- Thinking about the workflows you rely on, which Outlook features must exist in a new system (e.g., Gmail) for work to continue smoothly?
  - ○ What concerns would you have about a potential migration?
  - ○ What would you worry about losing; data, features, integrations, productivity?
- Which workflows would transfer easily to Gmail?
- Which workflows would NOT transfer?

Desired Migration Experience

- What would an ideal transition look like?
- What support, tools, or documentation would make the change easier?

Google Meet Conversation (XX min)

Let's talk about Google Meet - have you used the "huddle" or "Meet" feature in GChat (or accessed outside of GChat)?

- o What have your experiences with huddles or Meet been like so far?
- o What do you think are the differences or benefits of each?
- o What are some reasons you would use one over the other?
- o How do huddles and Meet compare to Zoom?
- o If Meet were enabled in the Calendar tool and you could choose between enabling either Zoom or Meet for a scheduled meeting, which would you choose and why?

Wrap-Up (XX min)

- What's one thing Meta should absolutely keep in mind as they roll out Gmail and Google Calendar?
- Looking back on your experience with Outlook, what are the top 3 features or capabilities you've relied on most, and why are they so critical to your workflow?
- Is there anything we didn't cover that you think is important to share about your experience with Outlook, or the migration process?
- Would you be open to follow-up questions via chat or a follow-up interview in the future?
- Thank you again for your time and thoughtful feedback!