

# Executive Assistant – User Interviews

Round 1 | Conducted March 2026

## Thesis:

To keep the EA a delightful and impactful product, we should focus on four pillars:

- Maintaining the friendly, customizable AI persona with a distinct executive assistant role;
- Deepening the time-saving value by positioning the EA as a "centralized brain" that prepares users for their day through automated, context-rich briefs;
- Building a collaborative, memory-retaining experience that grows more valuable over time; and
- Eliminating the need for users to manually sift through their inbox + documents to surface what matters most.

[Watch a video](#) of users sharing how the Executive Assistant delivers value and how it stands out from other AI tools.

## How We Gathered This Information:

On March 6th and 9th we conducted 10 1- hour live user interviews to test the current EA prototype against a sample of potential users in the market. We had them log into the EA, complete the onboarding journey, invited them to connect their Outlook account, upload documents, and interact with the EA. We got their feedback on the current functionality and understood what would greatly improve their experience with the EA. We gathered their thoughts on AI tools already in the market, the UX/UX design of the EA, how they ideally would like to use the EA in their day to day work.

## What Was the User's Perception on the label "Executive Assistant?"

Users enjoy the title "Executive Assistant" title because it quickly helps them understand the role of the AI, makes the tool feel more approachable & friendly, and differentiates the offering from competitors who offer "faceless AI Assistant" tools that otherwise intimidate users.

- *"Executive assistant is... I quite like that. I wish I had an executive assistant, and now I do." - Kevin User Interview #2*
- *"I got the feeling that, it's kind of, like, more human compared to the others, because The fact that you can choose a person... it doesn't feel completely machine-like." - Saverio User Interview #8*
- *Executive assistant is... more professional." - Derron User Interview #4*

## What Do Users Want to Use The EA For?

Three major roles came up over the course of the interviews for highly desired functionality of the EA.

1. A morning & meeting briefing coordinator
2. A "shield" between them & Outlook
3. EA to serve as a "centralized brain" that connects their various sources of information

**Users want to spend more time doing, and less time preparing.** Almost every user had the chore of figuring out what they needed to do that day & before they could start their work, they needed to comb through multiple sources in order to start their day with a "to do" list. There was great excitement when the users saw that the EA could give them that time back & catch tasks that they might otherwise forget about. Additionally, they noted busy schedules with limited time to prepare for meetings during the day. They wanted the EA to prepare them for the meeting with the necessary context for them to hit the ground running. This goes past a "you have a meeting at 3 with Linda" update and the value comes from sharing the context around the meeting & what the user needs to do ahead of time.

- *"Instead of spending an hour every morning or 45 minutes, maybe I can do it in 10... freeing up capacity" - Mark User Interview #10*
- *"That's always the most value that I've gotten out of [assistants], is, hey, here's what you need to know before you go into this meeting... saves me a lot of time." - Noah User Interview #6*
- *"That is a lifesaver. I don't know about you, but sometimes you're jumping from meeting to meeting. So... having that little... even just a summary... to remind me." - Kevin User Interview #2*

**Users showed a strong dislike for Outlook** for its disorganization and "chaotic" layout, but spending hours organizing their inbox was a necessary evil in order for them to know what was needed from them on a daily, or even hourly, basis. They were delighted to see that the EA could be a layer between them and their Outlook inbox to surface relevant information, ensure all necessary action items were accounted for, and that they stayed up to date without manual work on their end.

- *"I'll be blunt, I won't mince words, I hate Outlook's email. I just... I can't stand it. Mainly because it doesn't do a good job at organizing anything." - Derron User Interview #4*

**Users saw product differentiation for the EA when they learned it would be connected to their information sources.** Users were delighted that it can be connected to their inbox and data management systems, eliminating the need to copy and paste content over.

- *If I compare it with the ChatGPT Cloud Air Gemini, so, from where I didn't see, add to, to integrate it to, the application itself... manually copy-paste the email... From here, we just need to connect it, and we will get our query resolved." - Gaurave User Interview #3*

**Specifically for inbox management, 4 common themes arose:**

1. A strong desire for inbox summarization
2. The need to filter through noise to locate specific threads & topics in their inbox
3. The frustration & time cost associated with gathering necessary context for meetings & projects
4. The daily chore of trying to figure out what information really matters to them

## **Were Users Concerned about Connecting their Inbox to the EA?**

In large part, no, users were not largely concerned about connecting their inbox pending they had their employers' previous approval. Getting employer approval is essential to get users to adopt using the EA for their professional work.

### **Concern 1: Data Privacy & Employer Permissions**

Users expressed significant concern with breaking their employer's privacy policies, uncertainty of what the AI is doing with the data it has access to, and hesitation from some users about granting access to the entire inbox.

These concerns can be addressed by:

- Gaining employer permission ahead of rollout for users
- "Plain english" data privacy terms upfront
- Ability to sandbox documents into completely separate, contamination-free folders.
- We can offer controls over what is synced to the EA & what is not.

## **Where There Other Areas of Concern or Hesitation from Users About the EA?**

## **Concern 2: Readability of the response output**

There are significant UI improvements we can make to the EA response output to improve the user experience. The goal is to make the responses easy for the users to read, reduce sliding up and down through long responses, and quick extraction of the outputs.

## **Concern 3: The EA might result in increased work for the user with follow up questions**

Users are worried they will need to still spend time organizing their outlook, resulting in minimal time saved & potentially increased work of using EA + organizing their Outlook.

- Ensure that the information surfaced by the EA does not require the user to navigate to their inbox (ie be able for the user to see attachments within EA vs navigating to email to see them)

## **What did Users See As Unique Value Offerings of The EA?**

### **Collaborative Nature & Contained Knowledge**

*"The fact that it stopped and asked me a question before it began to produce the schedule, I really liked that... totally different from Copilot, which is really functional and transactional." - Kevin User Interview #2*

**Note:** When the AI asked too many follow up questions without producing a response users got frustrated and experienced increased frustration with each follow up question

*"If I'm gonna spend more time writing out these confirmations [to the AI], I could have just fixed it myself anyways." - Aarez User Interview #5*

### **Friendly & Humanized Approach to AI**

*"I got the feeling that, it's kind of, like, more human compared to the others, because The fact that you can choose a person... it doesn't feel completely machine-like." - Saverio User Interview #8*

### **Persistent Memory of the User's Behavior & Preferences**

*"In Microsoft Copilot, if we open, like, a new conversation, Copilot just forgot the other conversations... if we can have... a new conversation, but you keep the context... this will be... very valuable for me." - David User Interview #9*

## Personalization of the Assistant Through the Persona Cards

*"Copilot does not do customization – how this differs to that one is, you can actually set the tone of how you want the responses, and I don't think that exists as far as I'm aware." - Mark User Interview #10*

## Integration into their systems eliminating the need to copy & paste information over

*"If I compare it with the ChatGPT Cloud Air Gemini, so, from where I didn't see, add to, to integrate it to, the application itself... manually copy-paste the email... From here, we just need to connect it, and we will get our query resolved." - Gaurav User Interview #3*

## EA acting as a centralized context base

*Confluence does not have the context of my Outlook, my emails, my website... I guess what the hope here is that we kind of centralize it all... I would say it's still very helpful." - Aarez User Interview #5*

## Next Steps for V0 Build of the EA

\*note green highlight has been addressed between conclusion of R1 user interviews and today (4/1/26)

### Improvements to AI Performance

1. Improve document understanding and strengthen cross-document reasoning
2. Increase EA awareness on its knowledge sources
  - a. Email Folders
  - b. Integrations
  - c. Attachments (Improved on the knowledge of the attachment, but improvement still needed on the content of some attachments)
3. Reduce excessive clarification loops, provide a fast initial answer and iterate afterward
4. Improve handling of misspellings and imperfect queries.
5. Work to reduce & eliminate hallucinations, especially promises of actions & outputs the system cannot generate.
  - a. Doc Generation
  - b. Integrations
  - c. Filters

### Create Clarity on Data Policy & Increase Data Sharing Controls

1. Generate more trust around connecting inbox & document upload

- a. Users handling sensitive client information need upfront privacy policies regarding AI data training before they upload docs & connect inboxes
2. Support more granular email sync controls (e.g., internal-only emails, domain filters).

### **Improve Knowledge & Content Handling**

1. Make referencing documents more intuitive and automatic
  - a. Improved in R2, but more work is still needed
2. Improve the ability to search and answer questions across the knowledge base.
3. Allow user control over persistent memory & strategic use of single session memory
  - a. Users handling multiple clients (like PMs) do *not* want the AI to remember all documents holistically. They specifically request siloed folders/conversations to prevent "cross-contamination" of confidential client data.