CRM REDESIGN PROJECT

Research and Design Overview – November 2017

Project Goal

To incrementally grow sales and AOI by creating a NEW integrated Customer Relationship Management (CRM) system that will enable the Quill Sales Division (QSD) to effectively sell to the Quill customer.

To make it **easy and effortless** for QSD to support the Quill customers

Research Methodology

Used foundations of the Contextual Design methodology which is centered around understanding the needs of the end user by directly observing users in their natural work environment.

User Interviews

16 in-person interviews were conducted with representatives of the following QSD Teams:

Quote Specialists
Site Managers
L&D and sales coach
Healthcare
Admin Team Manager
Specialist Team Manager
Admin
Print & Promo
KAM Team Manager
Education
Commercial
KAM
Technology Specialist
Technology Specialist
Furniture Specialist

Notes

- Notes were taken during each interview documenting how the user goes about their day.

- Notes were added into a spreadsheet and interpreted in order to understand insights, tasks and pain points.

- High level topics were created based on commonalities in the notes across all users.

Insights

The following insights were discovered as the interviews were conducted:

- It needs to be EASY and EFFORTLESS for QSD as well as our customer
- Daily performance issues with 9+ sales systems takes time away from working with customers
- Its all about, and it all starts with the customer
- No consistent communication of customer activity/status of tasks
- Notes are a critical piece of the communication process
- There is too much dependency on manual reporting
- Order information needs to be consolidated
- Reps need a complete picture of a customer from a single source
- There is significant distrust in the data
- Sales tools need to be reviewed and updated on a regular basis (Quarterly)

Topics

As the notes were interpreted and analyzed the following topics were discovered:

- Relationship Management (Customer)
- Team Management
- Task Flow and Status-ing
- Daily Prioritization
- Ordering
- Reporting

Use Cases / Stories

- Notes are grouped and organized into topics so that use cases/story titles can be created.

- These use cases will be used to fully understand the users work flow through the new system.

- Use Case creation has been started based on the prioritization of the topics:
  1. Relationship Management (Customer)
  2. Daily Prioritization
  3. Task Flow and Status-ing
  4. Team Management
  5. Ordering
  6. Reporting

High Level UI Concept Design

- After all notes are interpreted and analyzed a **high level** UI concept design has been started.

- This is a **DRAFT** of what a CRM UI design may look like

- This is a living document that will change as the use cases/stories are created

- The concept will be the starting point for the UI designer to create a mock up of the new system.

- The concept is on the whiteboard in QSD Conf Rm 3

Next Steps

- Continue to create the list of Use Cases for all topics.

- Review the UI concept with the UI Designer (Paul) in order to get high level feedback and answer any questions around the design concept.

- Meet with Development and UX to walk through the concept and discuss how the mock-up will be created

- Test the mock-up with a subset of the users interviewed in order to validate the design and iterate as needed

Whiteboard - SALES TEAM ROLES

Whiteboard - INSIGHTS

INSIGHTS

- EASY & EFFORTLESS for Sales
- ITs all about the Customer (task)
- There is no consistent communication/statu
- Notes are critical to resolving issues
- There is too much dependancy on manual report
- Ordering & order views need to be consolidat
- Sales board/blog to give feedback
- Need a complete picture of the Custom
- Significant distrust in the data
  Daily Performance issues w/ computers+apps
- Sales needs a Quarterly Tech Budget

Whiteboard - QUESTIONS

Whiteboard - DATA SOURCES
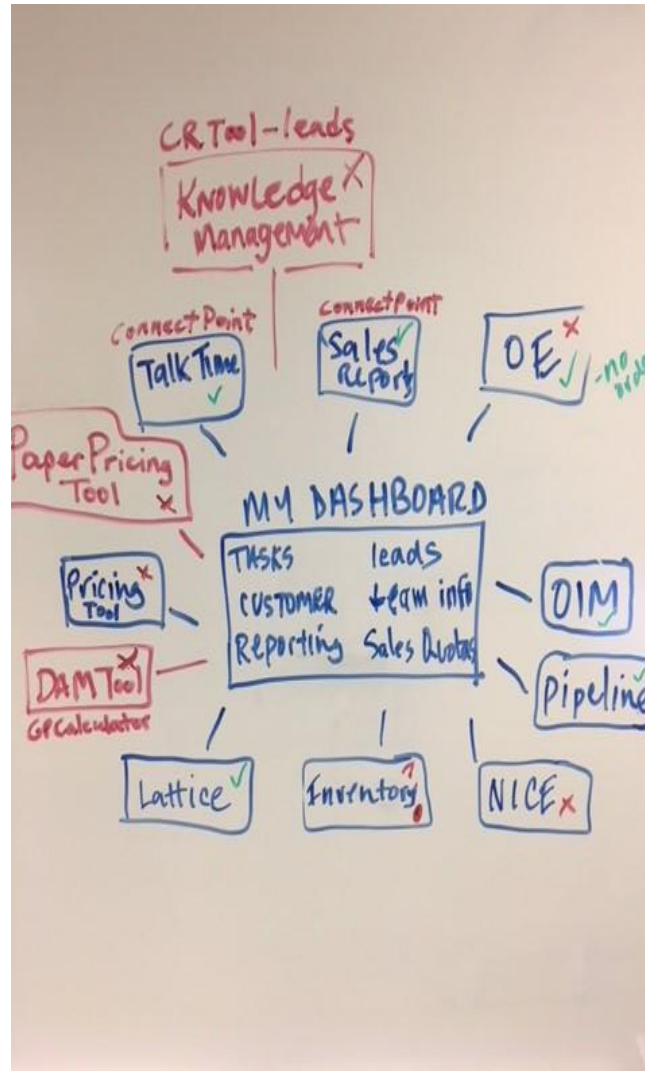
UI Design Concept - DRAFT

UI Design Concept - PROTOTYPE 1

UI Design Concept - PROTOTYPE 2