

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

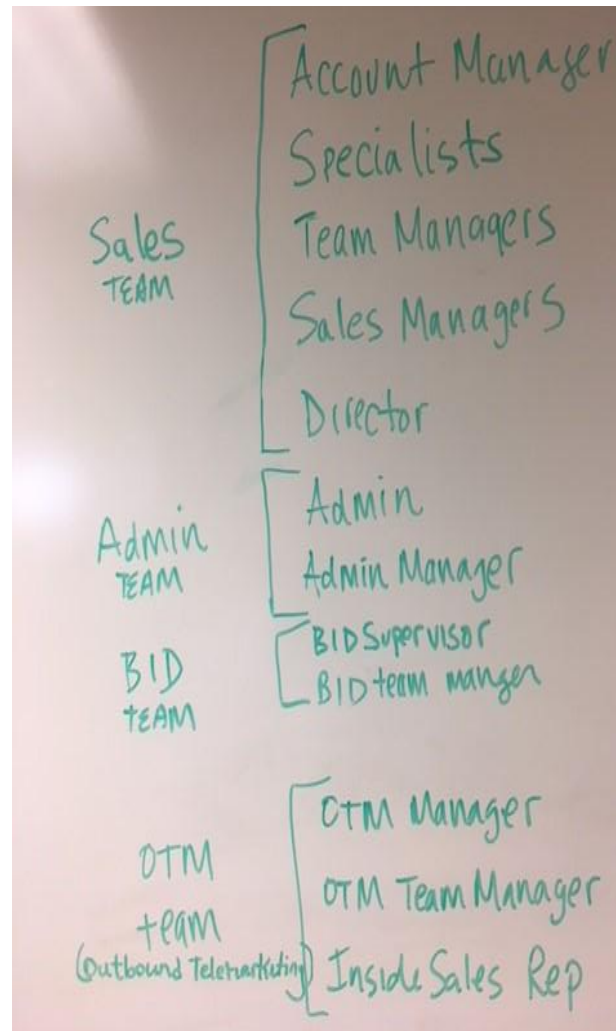
High Level UI Concept Design

- 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

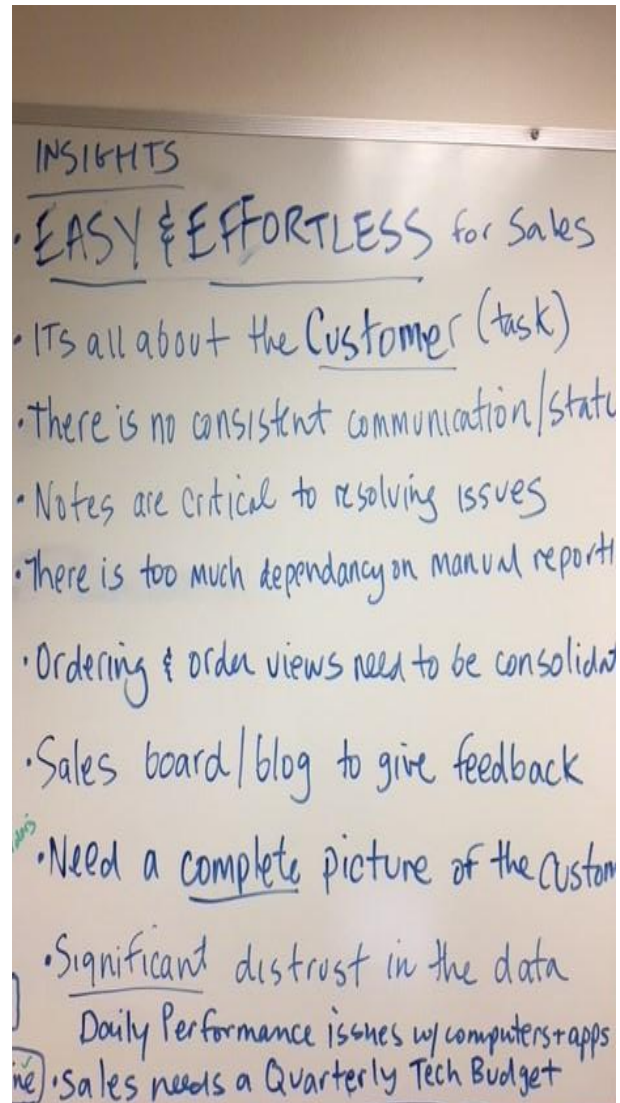
Next Steps

- 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

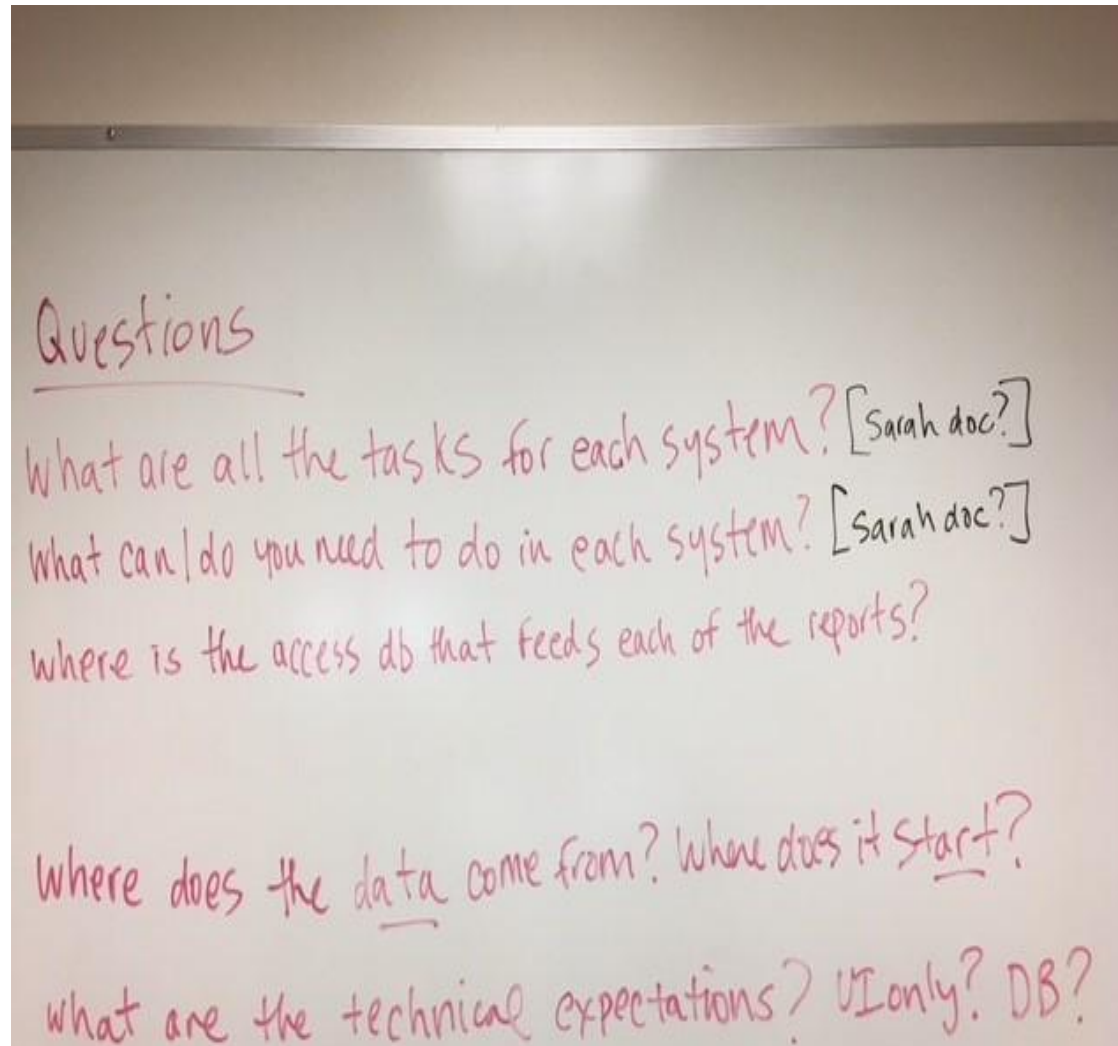
Whiteboard - SALES TEAM ROLES



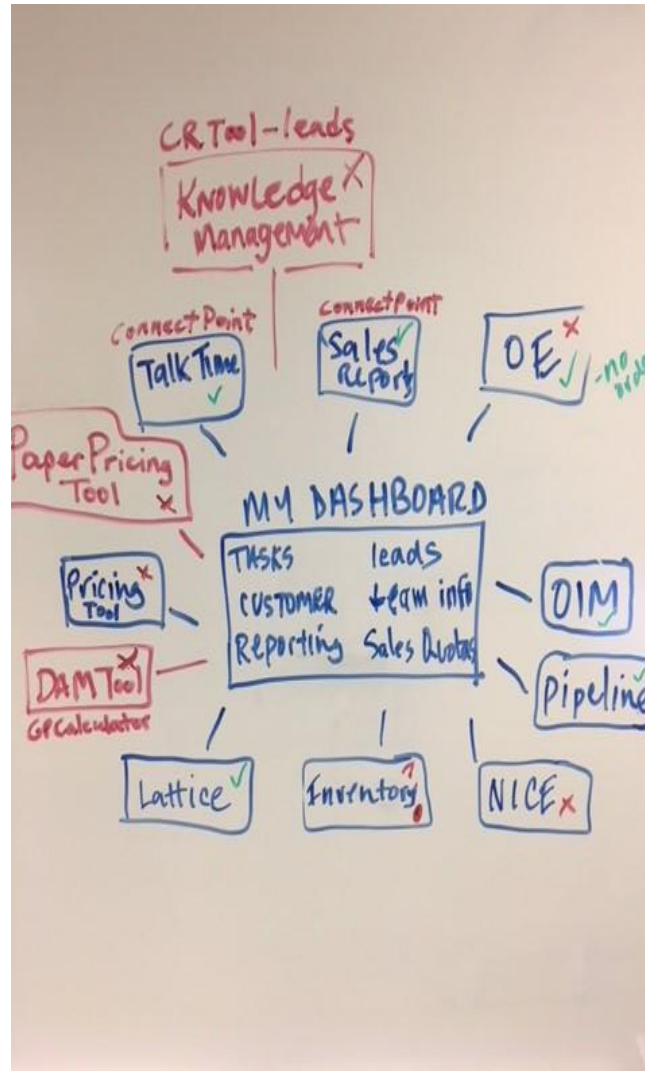
Whiteboard - INSIGHTS



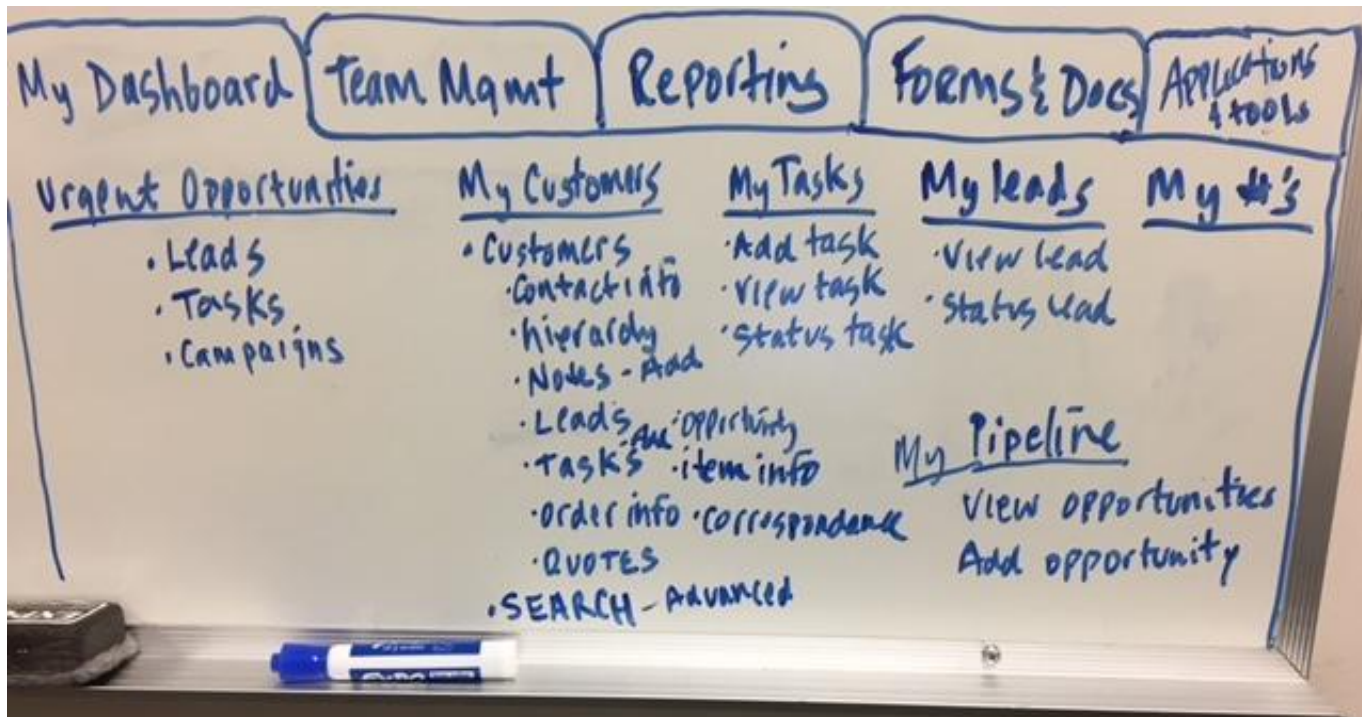
Whiteboard - QUESTIONS





Whiteboard - DATA SOURCES



UI Design Concept - DRAFT



UI Design Concept - PROTOTYPE 1

☰ 🔍 Dave Sales  ☐

Urgent Opportunities

- Leads
- Tasks
- Campaigns

My Tasks | To Do's

- View Task
- Add Task
- Status Task

My Leads

- View All Leads
- Status Leads

My Sales #'s

- Summary #'s

Alerts & Messages


- email Messages
- Sales & Promo Alerts

My Pipeline

- View Opportunities
- Status Opportunities

This Weeks Sales Progress

Last week ▾



Date	Sales
Oct 1	100
Oct 2	40
Oct 3	180
Oct 4	90
Oct 5	150
Oct 6	310
Oct 7	230
Oct 8	390
Oct 9	300
Oct 10	420







TRENDS

- Paper **24.7%**
- Technology **14.2%**
- Furniture **8.1%**
- Cleaning **5.7%**
- Safety **4.9%**

My Customers

- Team Management
- Reporting
- Forms & Docs

MY CUSTOMERS 33

 Hierarchy (original info)	Folder		23/11/2017 12:34 AM
 Contact Information	Folder		23/11/2017 9:13 AM
 Notes + Add	Doc		23/11/2017 12:00 AM

UI Design Concept - PROTOTYPE 2



Opportunities Dashboard Documents Tasks User Administrator

Search Pivot

Welcome Ramapriya Arumugal



> Stats

75 | 1000 | 1,900 | 5,411 Widget - Progress tracker D/M/Q/Y

Take Action Disabled

Enterprise #: 10022324 - Site #: 5500 MC

Primary List Secondary List Custom List Followups

OPPORTUNITY NAME	CALL RANK	PHONE#	STATE	DIAL	LEAD LEVEL	CONTACT
West Hall High School	3	4/14/2015	Prospecting			jrogers@cloudhub.com
Cloudhub + Anypoint Connectors	2	4/14/2015	Prospecting			jrogers@cloudhub.com
Cloudhub + Anypoint Connectors	145	4/14/2015	Prospecting			jrogers@cloudhub.com
Cloudhub + Anypoint Connectors	113	4/14/2015	Prospecting			jrogers@cloudhub.com
Cloudhub + Anypoint Connectors	147	4/14/2015	Prospecting			jrogers@cloudhub.com
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Enterprise Site

- Opportunities
- Tasks
- Pricing
- Email
- Customer Profile
- Talking Points

Customer Profile: WEST HALL HIGH SCHOOL + Follow E

Commitment Details

Field 1 Field 2 (3) Field 3

Commitment:0.0 % to Comm: Commitment LastUpdated Date: -

Open Opp Pending: Next Follow Up Dt:

Sales History

Field 1 Field 2 (3) Field 3

Commitment:0.0 % to Comm: Commitment LastUpdated Date: -

Open Opp Pending: Next Follow Up Dt:

Pricing Details

Field 1 Field 2 (3) Field 3

Commitment:0.0 % to Comm: Commitment LastUpdated Date: -