

# USABILITY TIPS FOR PIPEDRIVE

*There is one interesting thing with usability :) You may think that you already have intuitive software and good usability specialists. But, the more usability – the better! There is never too much of it, as it is **critical** for:*

- *Attracting new users, as they prefer more intuitive software*
- *Getting positive reviews like #1 in Sales CRM – you need A LOT OF ATTENTION to usability to be constantly ranked that high in this ultra-competitive business*
- *The more functionality you add, the more usability you need to keep everything intuitive*

## 1. Time zones & international sales - critical

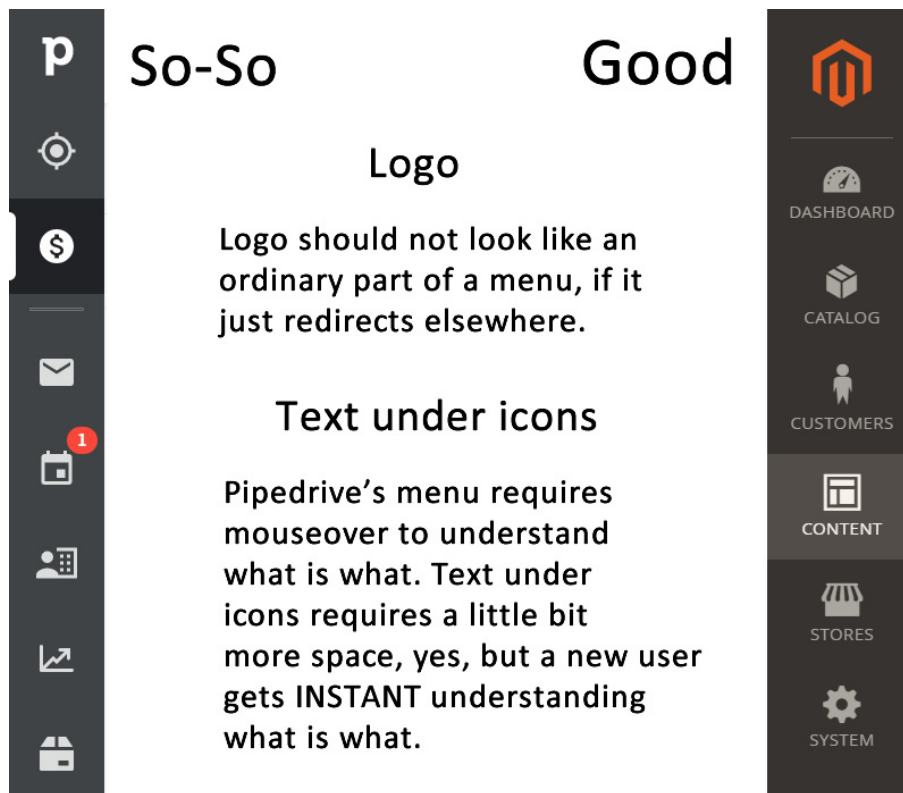
I don't see an option to specify time zones for contacts. It makes Pipedrive poorly suitable for international sales, as I can't see what time is in London or Sydney when planning my activities with such contacts. Also, there are several time zones in the USA.

As both interstate and international sales are **common practices**, the system should take care of that time zone thing **as a part of basic functionality**. Technically there are several Time Zone API services available that convert locations to time zones. It's a good question how to include these local times in the interface – it requires a deeper analysis. Still, even if you only show tooltips with local times on mouseover it's already better than nothing.

## 2. Menu

As the best usability experts suggest, an ideal interface should be understandable at the first look... In real life, it is not always possible to make everything that simple, but a main menu is for sure one of the most important elements of any software and worth analyzing whether it can be tuned to be more user-friendly.

- Your logo looks like a standard element in navigation, but it just redirects elsewhere. It's like having 8 tabs opened in Chrome, all behave normally, but the first one redirects to some other tab – that's confusing for a regular user.
  - The solution is to make your **logo or it's background** visually different, so it won't look like other elements in the menu.
- Adding text under icons gives an instant understanding what is what. It may require some extra pixels, but it's worth it.
  - Yes, I understand that there could be issues with other languages (too long words). You may keep current style for such languages, but it's not the reason to avoid tuning your main (English) version.
  - Yes, I understand that compact/minimal menu may even look better for you, but you are an experienced user, not a new one. Basic principle of usability is „Don't make me think“ and your current menu unfortunately makes me think. As a variant, you may introduce an option to „collapse/expand“ this menu.



### 3. Activities

In activities I expected to see a list of 1) **WHEN** and 2) **WHAT** in chronological order. I was able to change the order of columns to get the desired result. But in default configuration date/time was at the other end of the table and not visible (or maybe visible only on big screens). Do you have some reasons to use such default configuration? My variant seems more logical at the moment.

Activities

Are you using Outlook or Google Calendar? [Connect your calendar](#)

[+ Activity](#) [Propose times](#)

All [Call](#) [Meeting](#) [Task](#) [Deadline](#) [Email](#) [Lunch](#)

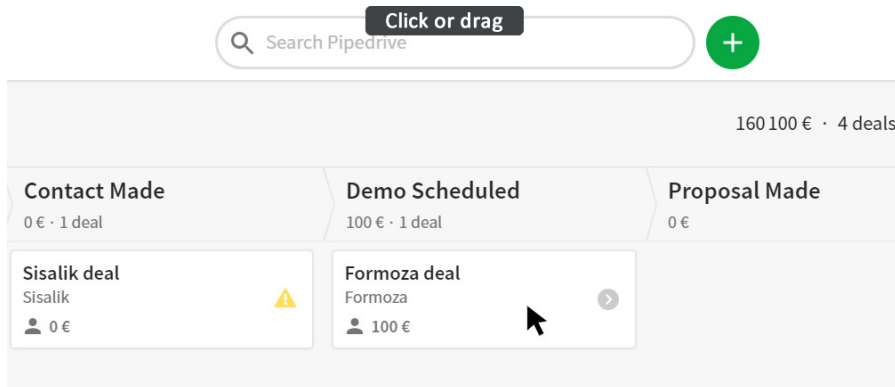
<input type="checkbox"/>	Done	Due date ▲	Duration	Subject	Deal
<input type="checkbox"/>	<input type="radio"/>	11. juuni 9:00	00:30	Call	Empire deal
<input type="checkbox"/>	<input type="radio"/>	12. juuni 9:30	01:00	Call	Sisalik tehing
<input type="checkbox"/>	<input type="radio"/>	12. juuni 14:45	01:00	Call	Novatech deal

**Activities - AFTER I changed the order of columns.**

## 4. Tooltips

You clearly need more tooltips to suggest new users „what is what“ or „what to do“.

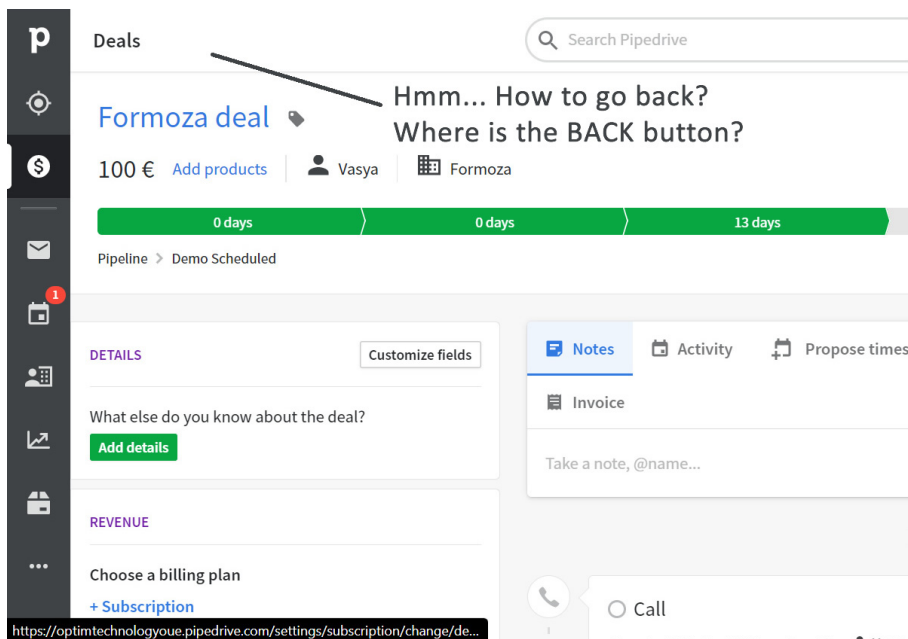
- In order to not overload the interface with regular tooltips, you may make some of these appear at the top/bottom/etc of the page.
- Such approach also allows creating longer and more informative tooltips.



## 5. Back button

Technically I can use browser's back button, but that's not obvious. It is common that browser's back button may lead to „confirm form submission“ and other errors in different web-based solutions, and software's own back button is often preferred by users.

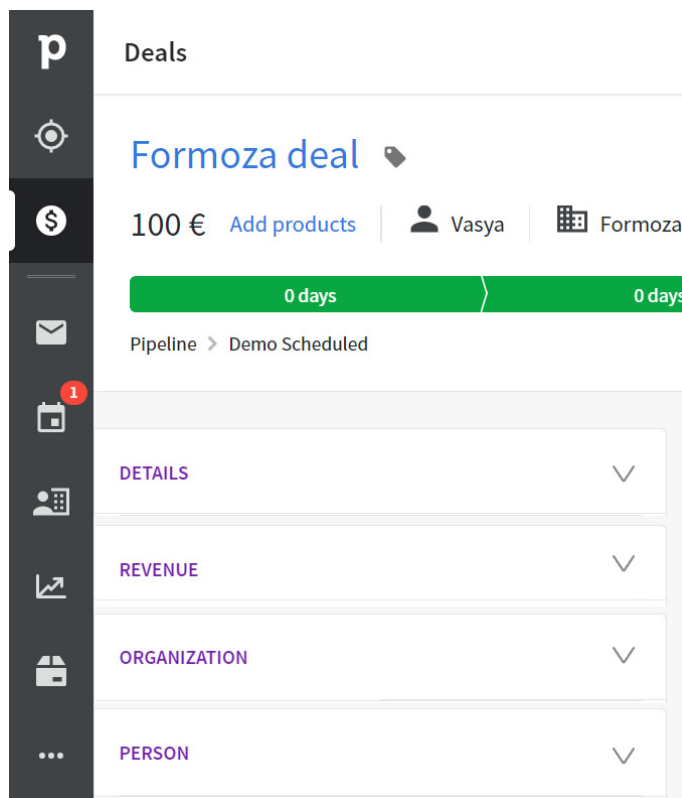
It's very good to support browser's back button, but for usability, your own back button will clearly make the interface more simple and understandable for new users.



## 6. Expandable areas

Another good idea is to consider using „expandable/collapsible“ areas. I’m not saying that it will be 100% suitable for you, it needs a deeper analysis, but it’s probably suitable.

It’s a common usability technique in modern software, it reduces visual noise and makes everything easier. Some may say that it adds extra clicking, but it reduces scrolling. Also, a user may keep everything expanded.



## My CV

I’ve sent you my CV, there’s one more good idea inside :)

If you haven’t seen it, then you can find it here:

<https://optim.ee/cv.pdf>

Best regards,

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I’m in Tartu :)

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