VERY BASIC USABILITY

1. Main idea/purpose

According to usability, you should communicate the main idea/purpose of your website/software at the beginning. Basically, you should write "CRM" or "Sales CRM" here:

Designed to keep you selling

When you need to stay laser-focused on the right deals, Pipedrive is here to support you.

Try it free

Full access. No credit card required. Used by over 95,000 companies.

Even if most of your visitors are aware what it is, there are a lot of visitors who are not aware that Pipedrive is a Sales CRM and it is important to tell them that. Currently they have to scroll down or go to the menu to find out what it is, which is not good according to usability

HARD USABILITY

These two ideas require a lot of work, not just tuning something a little bit.
*However, these should be also **extra effective** for the growth of your business.*

2. Instant access to a demo account

Another good idea is to **provide instant access to a demo account (1-2 clicks)**. Whatever reasons Pipedrive had not to do it till now, but it should be super-effective for gaining new customers:
- On a competitor's website users are still thinking whether they should sign up or not. Also, there are tens of competitors and it's a huge work to sign up everywhere.
- On Pipedrive's site they will be already exploring the software, being 1 step ahead in a "pipe" (higher probability of converting into Pipedrive's customers).

3. Local times for interstate/international sales

Many salespeople sell to other states/countries, but Pipedrive doesn't show local times of contacts (current time and for future events). It's hard to plan calls without knowing local times, there are 6 time zones in the US and many more worldwide.
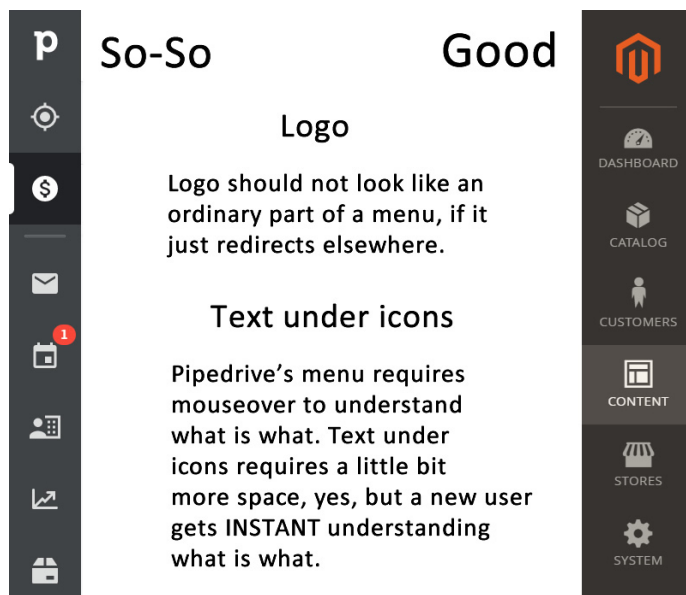
Adding such functionality will make Pipedrive more suitable for this **huge target group** than competing Sales CRMs. More users. More profit.

REGULAR USABILITY

4. Menu

As the best usability experts suggest, an ideal interface should be understandable at the first look...
It's not always possible to make everything that simple, but the main menu is for sure one of the
most important elements to be tuned wisely:

- Pipedrive's logo in the menu 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 **logo or it's background** visually different, so it won't look like other
  elements in the menu.

So-So   Good

Logo

Logo should not look like an
ordinary part of a menu, if it
just redirects elsewhere.

Text under icons

Pipedrive's menu requires
mouseover to understand
what is what. Text under
icons requires a little bit
more space, yes, but a new user
gets INSTANT understanding
what is what.

- Adding text under icons gives an instant understanding what is what. It may reguire some
  extra pixels, but it's worth it.
- Yes, 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, compact/minimal menu may even look better for an experienced user, but not for a new
  one. Basic principle of usability is „Don't make me think" and current menu unfortunately
  makes me think.
- **A good variant is to introduce an option to „collapse/expand" this menu, this allows to
 combine versions for both new and experienced users.**

5. 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). Was there some
reason to use such default configuration? My variant seems more logical at the moment.

Activities - AFTER I changed the order of columns.
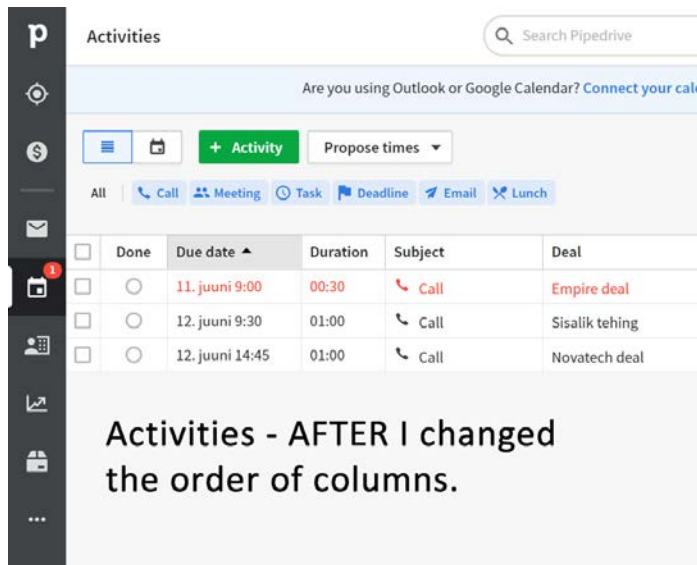
6. Tooltips

Pipedrive clearly needs 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.
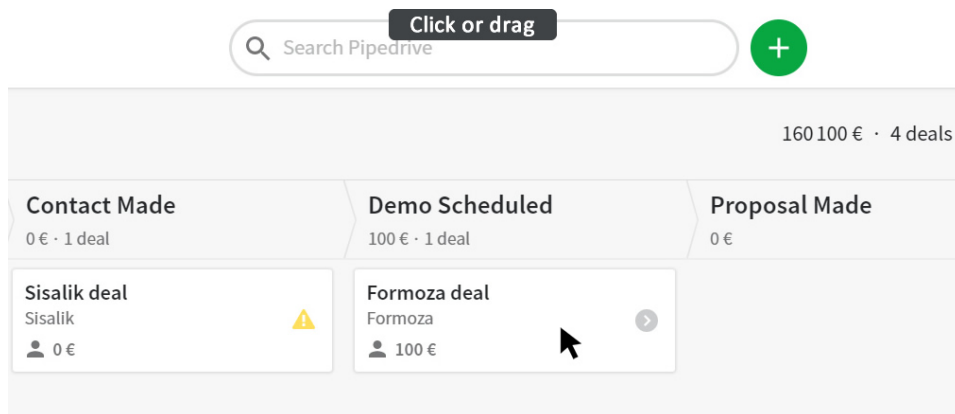
7. Back button

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.
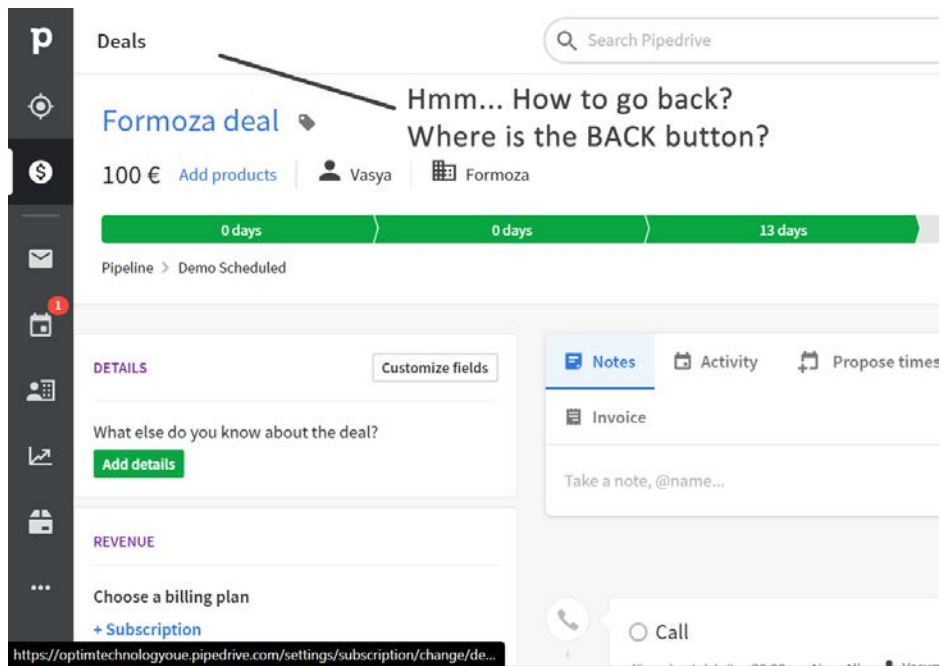
8. Expandable areas

Another good idea is to consider using „expandable/collapsible" areas. I'm not saying that it will be 100% suitable for Pipedrive, 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. Also, a user may keep everything expanded.
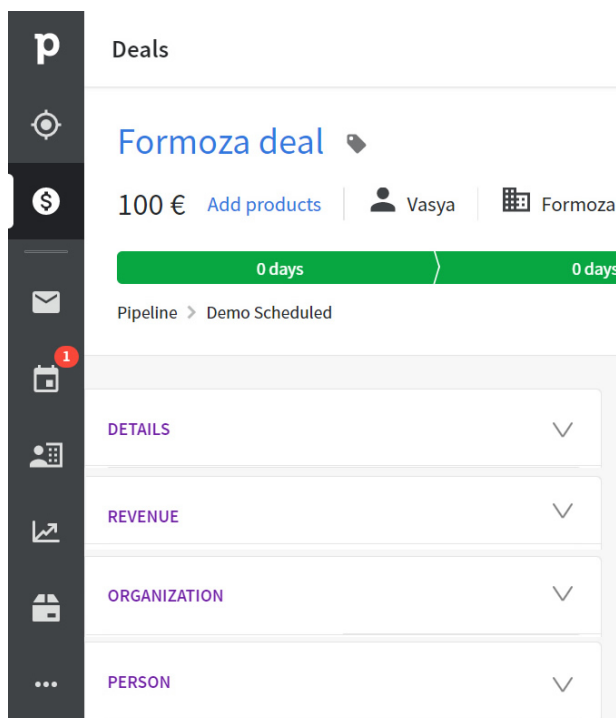
Thanks!

Best regards,
Aivar Alle

+372 569 24015
aivar.alle@gmail.com

I live in Tartu, Estonia