

POWERFUL IDEAS FOR PIPEDRIVE

1. 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.

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).

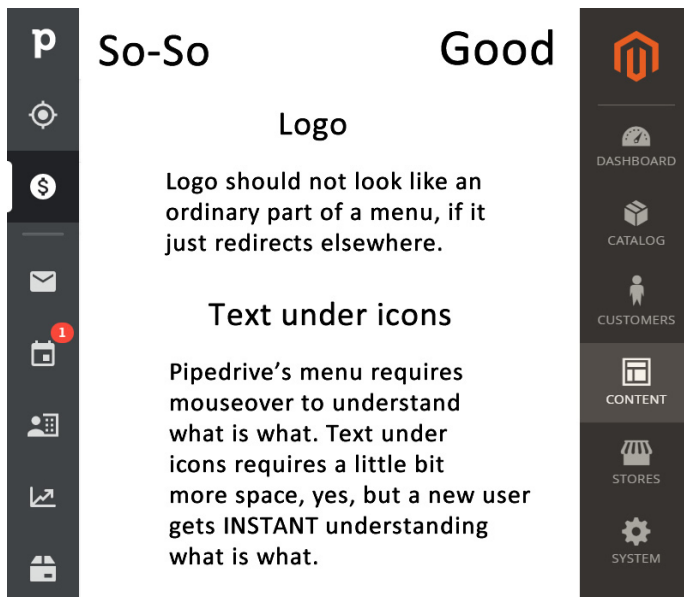
USABILITY IN GENERAL

*In simple English, usability means how easy and intuitive some software is.
One usability issue is not always a major thing, but combination of these is always a major thing!
Better usability leads to more users using it & more profit.*

3. 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:

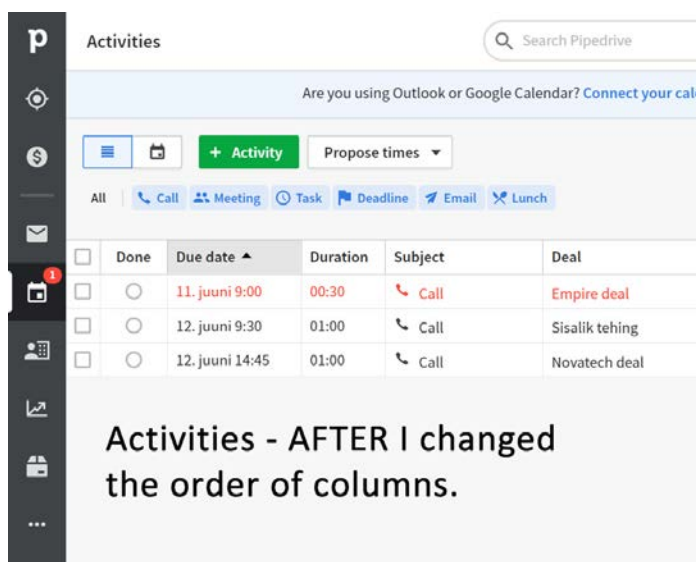
- Pipedrive's logo in the menu looks like a standard element in navigation, but it just redirects elsewhere. It's like having 8 tabs opened in Chrome, all behave normally, but the first one redirects to some other tab – that's confusing for a regular user.
- The solution is to make **logo or it's background** visually different, so it won't look like other elements in the menu.



- Adding text under icons gives an instant understanding what is what. It may require 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.**

4. Activities

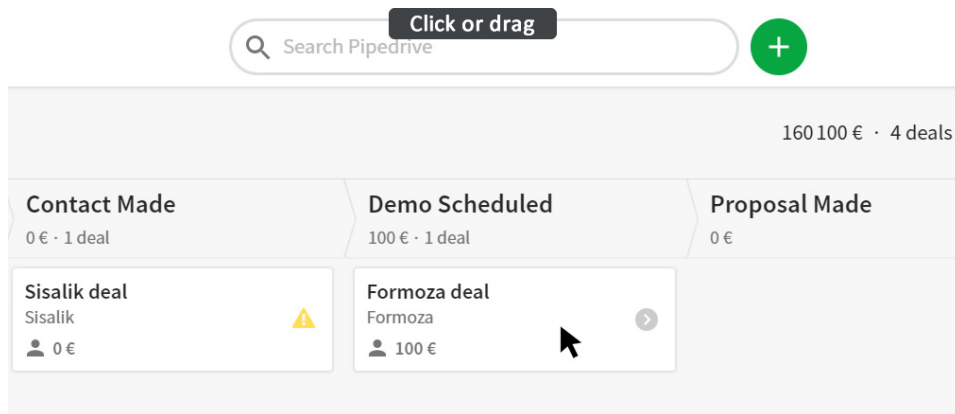
In activities I expected to see a list of 1) **WHEN** and 2) **WHAT** in chronological order. I was able to change the order of columns to get the desired result. But in default configuration date/time was at the other end of the table and not visible (or maybe visible only on big screens). Was there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



5. Tooltips

Pipedrive clearly needs more tooltips to suggest new users „what is what“ or „what to do“.

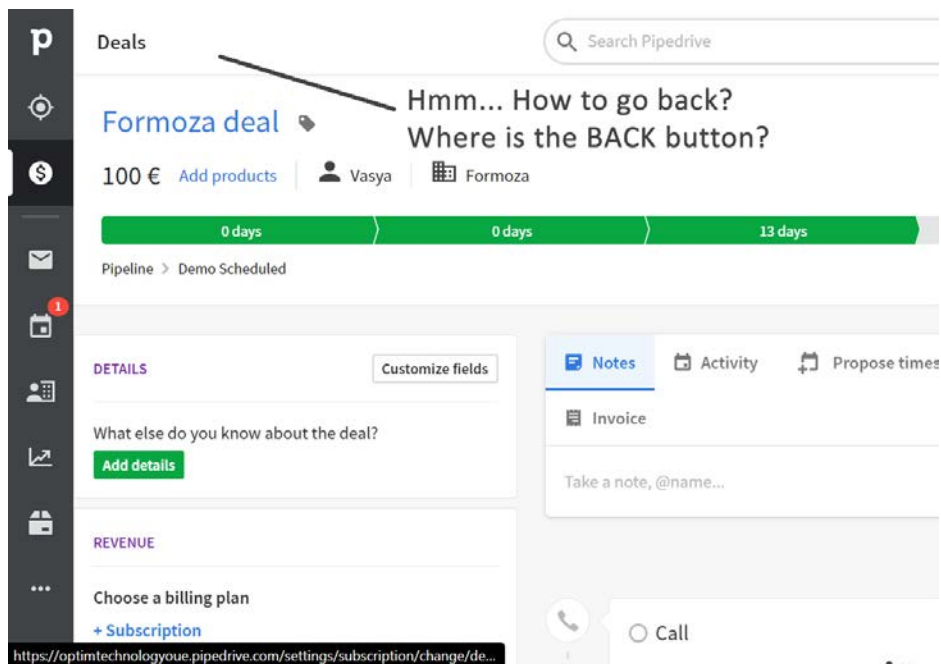
- In order to not overload the interface with regular tooltips, you may make some of these appear at the top/bottom/etc of the page.
- Such approach also allows creating longer and more informative tooltips.



6. 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.

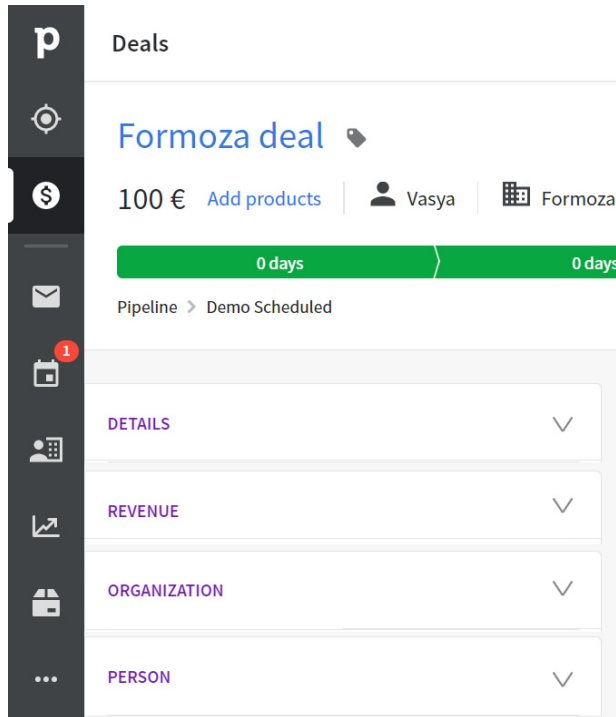
It's very good to support browser's back button, but for usability, your own back button will clearly make the interface more simple and understandable for new users.



7. 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,
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