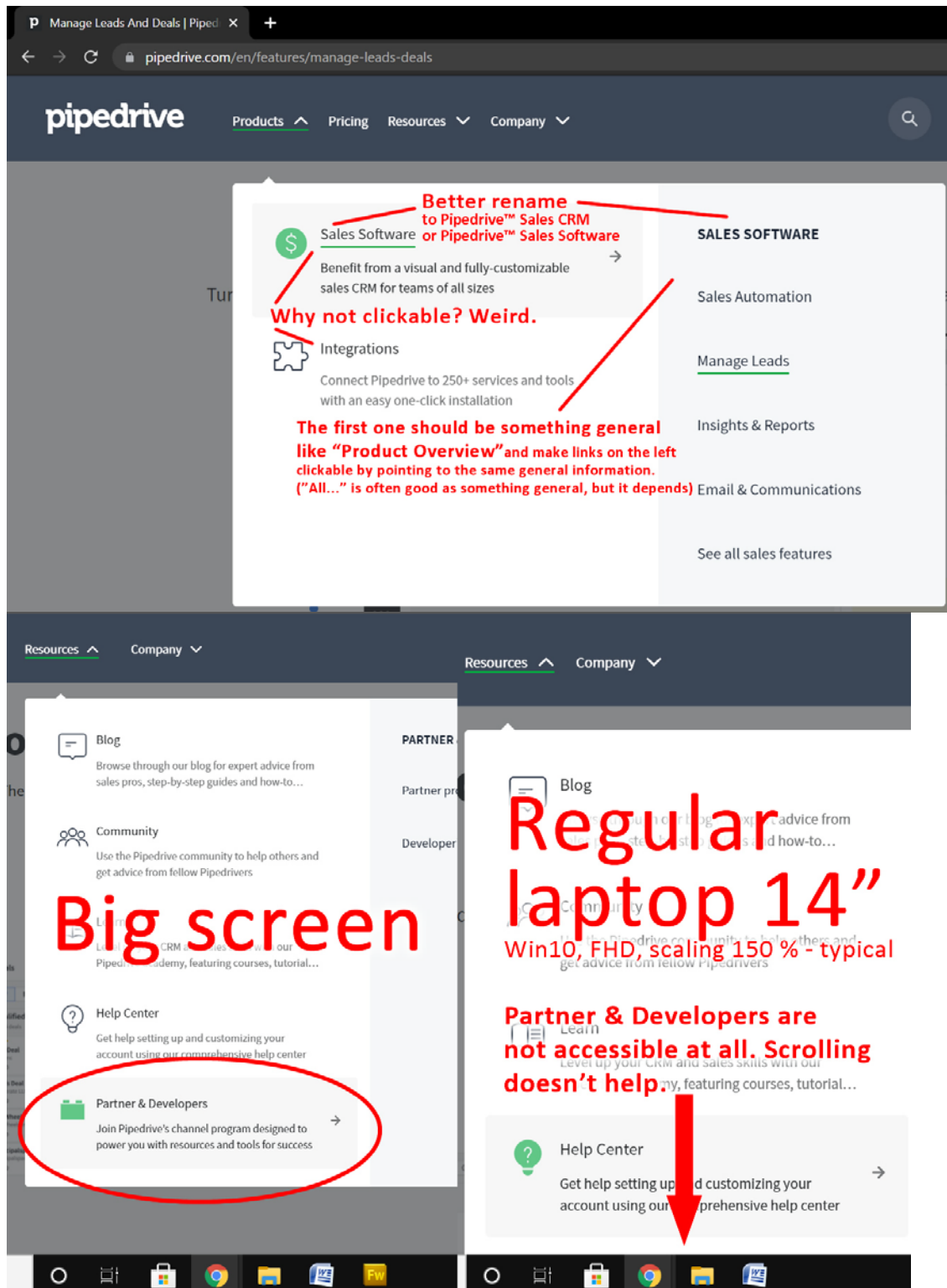


BASIC USABILITY

1. Website's menu

A very basic usability issue, as we are talking not about some complex software like CRMs, but about very basic principles of navigation on any website.



2. Main idea/purpose

UPDATE: This was actually fixed lately, but I'm not sure that the team knows this UX principle, so the "fix" may disappear anytime if the team decides to try a new message...

According to usability, you should communicate the main idea/purpose of your website/software from the beginning. Basically, just write "CRM" or (even better) "Sales CRM" somewhere in the beginning of your home page.

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 of 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.

POWERFUL IDEAS

*These three ideas may require a lot of work, not just tuning something.
However, these could be also extra effective for the growth of your business.*

3. Instant access to a demo account

A 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 amount of 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).
- A full demo mode is technically hard to do, but a read only demo access is technically very easy.
- If you want a good example of a demo access being organically combined with a regular "Try it free" button: promopult.ru – see a small modal window at bottom-left (on Desktop). It invites you to check out the demo account (well, they should add clearly visible buttons like "Exit demo mode" & "Sign up" inside the demo account & do more tuning, but these are details).
- Also, you may try hiding some parts in a demo account ("Sign up to see this"). It will create a good CTA-pattern: starting with a less demanding CTA ("See demo account") followed by a more demanding CTA ("Sign up"). [https://en.wikipedia.org/wiki/Call_to_action_\(marketing\)](https://en.wikipedia.org/wiki/Call_to_action_(marketing))

4. 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 target group than competing Sales CRMs. More users. More profit.

5. Themes & a choice of visual style at set-up

It even sounds trivial, but people have different emotional preferences, for some something like black-grey-green is perfect, but some prefer a more emotional style like stripe.com (but some other people will think that's "too much").

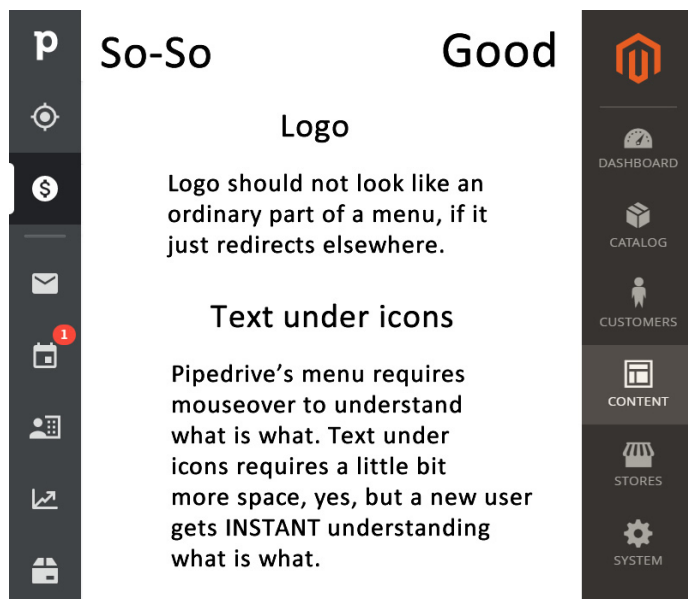
A visual look is an important "addictive" factor that affects a choice of a CRM, especially if competing against CRMs with similar functionality. So, giving a choice between two styles on set-up (let's keep it simple) with a note that more themes are available in settings is an idea that directly increases the number of users and profit.

REGULAR USABILITY

6. Software's 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:

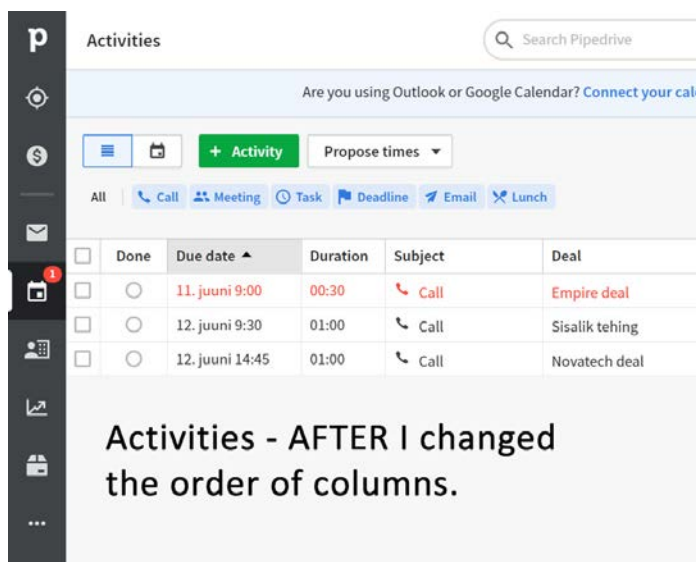
- Pipedrive's logo in the menu looks like a standard element in navigation, but it just redirects elsewhere. It's like having 8 tabs opened in Chrome, all behave normally, but the first one redirects to some other tab – that's confusing for a regular user.
- The solution is to make **logo or its background**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



- Adding text under icons gives an instant understanding of 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 the current style for such languages, but it's not the reason to avoid tuning your main (English) version.
- Yes, a 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 the 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.** Btw, users often prefer an expanded variant even if a collapsed one is available (unless extra screen space is needed).

7. Activities

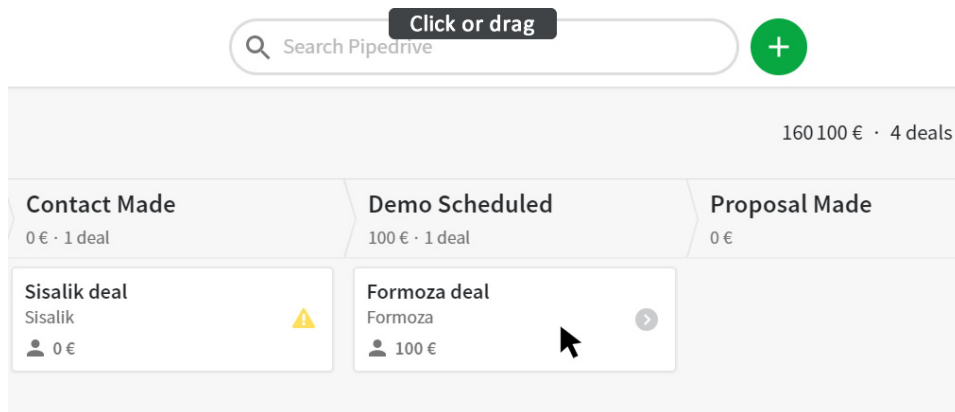
In activities I expected to see a list of 1) **WHEN** and 2) **WHAT** in chronological order. I was able to change the order of columns to get the desired result. But in default configuration date/time was at the other end of the table and not visible (or maybe visible only on big screens). Was there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



8. Tooltips

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

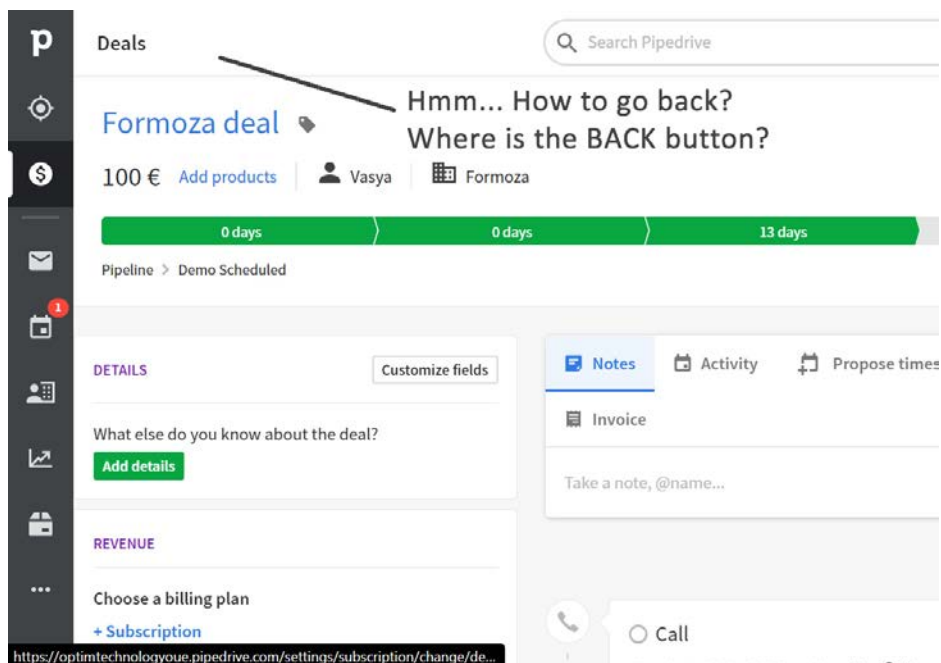
- In order to not overload the interface with regular tooltips, you may make some of these appear at the top/bottom/etc of the page.
- Such an approach also allows creating longer and more informative tooltips.



9. Back button

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

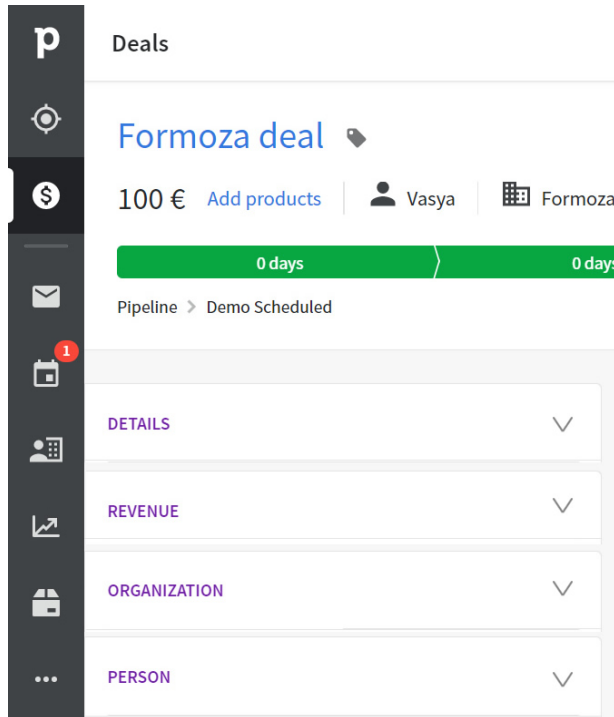
It's very good to support a browser's back button, but for usability, your own back button will clearly make the interface more simple and understandable for new users.



10. 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.



11. Sales Assistant

- Very important usability issue: <https://youtu.be/EtbAUpb4ycY> (40 seconds)
 - **UPDATE!** It was changed to "Edit activity", but this doesn't help much - I can't go to a deal/person by clicking on names... These are things that I CAN do in Activities/Calendar, but not in Assistant.
- Nice idea for Sales Assistant etc: add a clock (current time). There's a clock in Windows/Other_OS, but it's far away on a screen (more eye movements, less comfortable).
- Also, assistance with planned activities requires more tuning in general.

12. Yes, I already have more things on radar, too...

For example, I saw complaints about too much scrolling when there are many things inside deals – I already have some ideas for this. And there are more things to fix or improve...

Thanks!

Maybe you have already considered something from this list and please note that I'm not criticizing - **I'm just showing my skills in usability** and it took time to figure out what can be improved in your system.

PS. I have an INTJ personality type, MBTI says that I'm "Mastermind", but Socionics says that I'm "Analyst" (that's more correct).

Best regards,
Aivar Alle

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I live in Tartu, Estonia (Pipedrive has an office here, but it's hard to get inside).