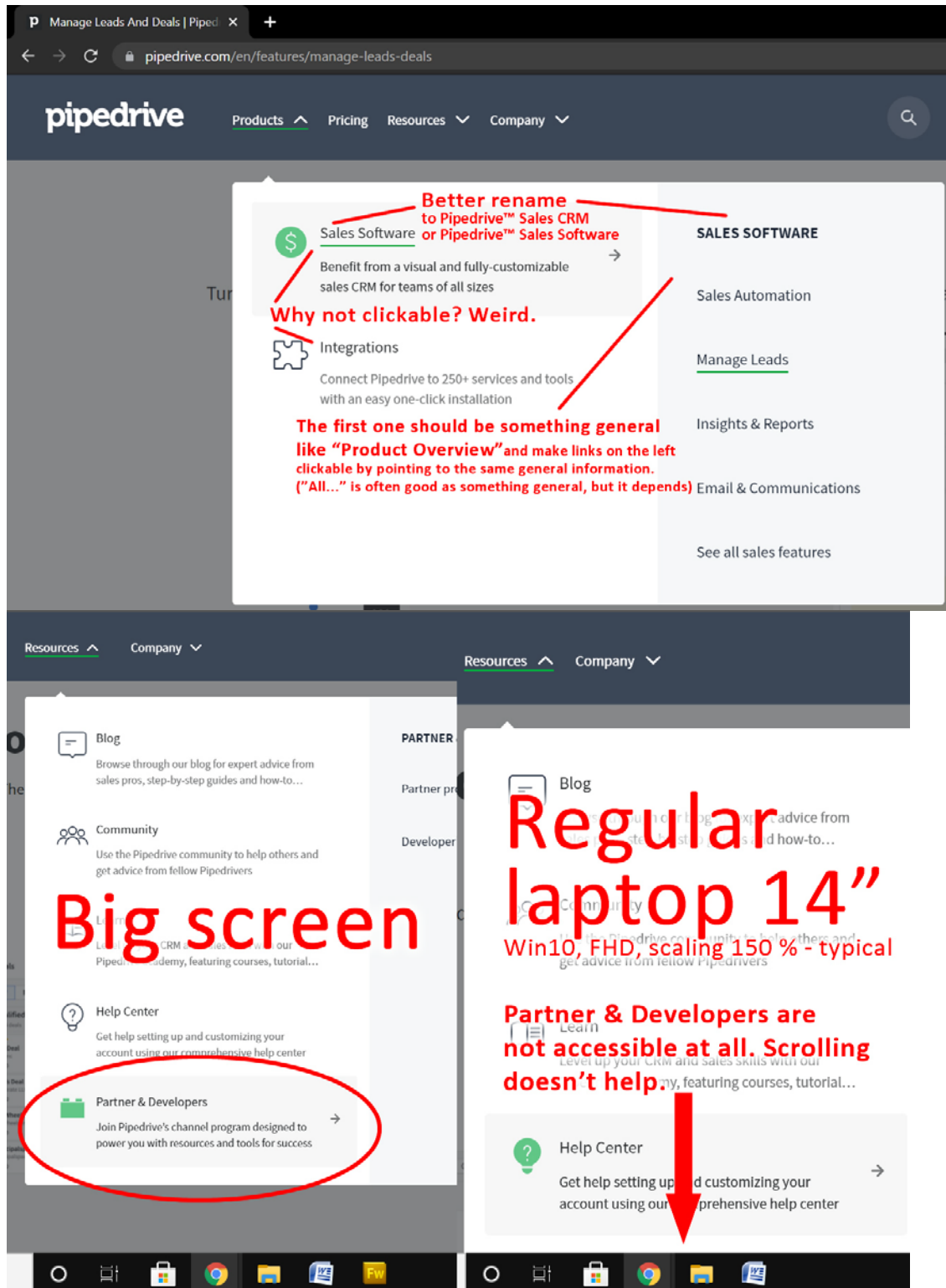


MY ADVICE FOR PIPEDRIVE TO SHOW MY SKILLS IN UX
See top expert's opinion about my advice at the end of the document.

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").

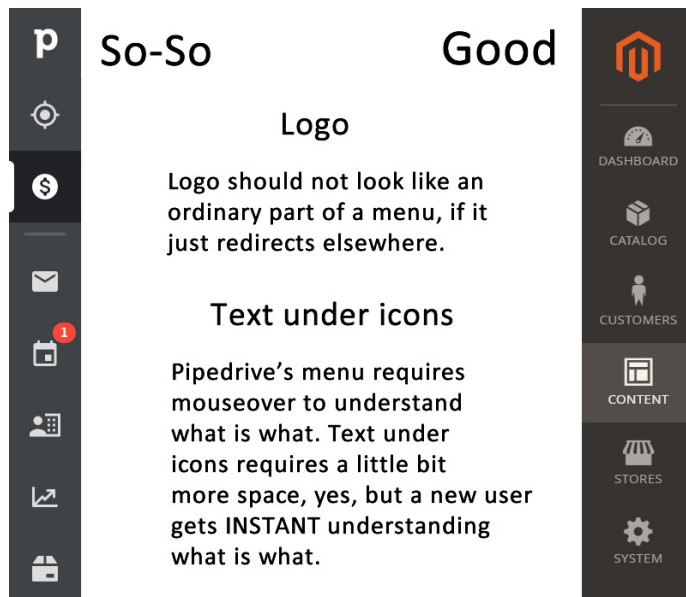
A visual look is an important "addictive" factor that affects a choice of a CRM, especially if competing against CRMs with similar functionality. So, giving a choice between two styles on set-up (let's keep it simple) with a note that more themes are available in settings is an idea that directly increases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

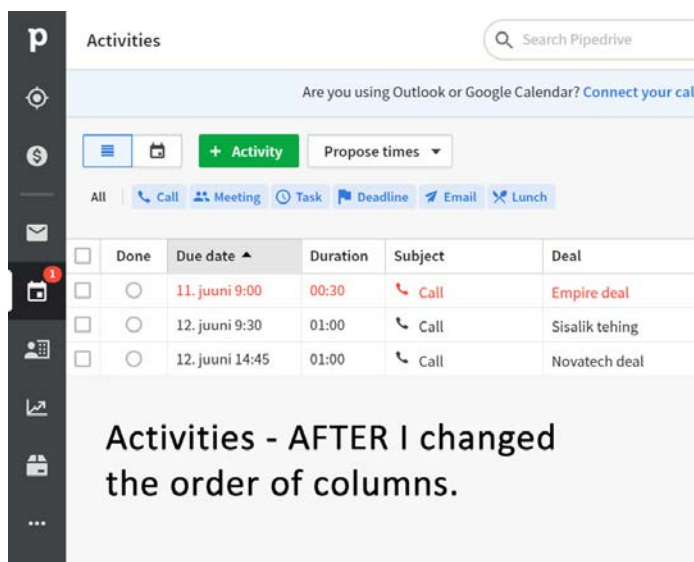
- Pipedrive's logo in the menu looks like a standard element in navigation, but it just redirects elsewhere. It's like having 8 tabs opened in Chrome, all behave normally, but the first one redirects to some other tab – that's confusing for a regular user.
- The solution is to make **logo or its background** 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

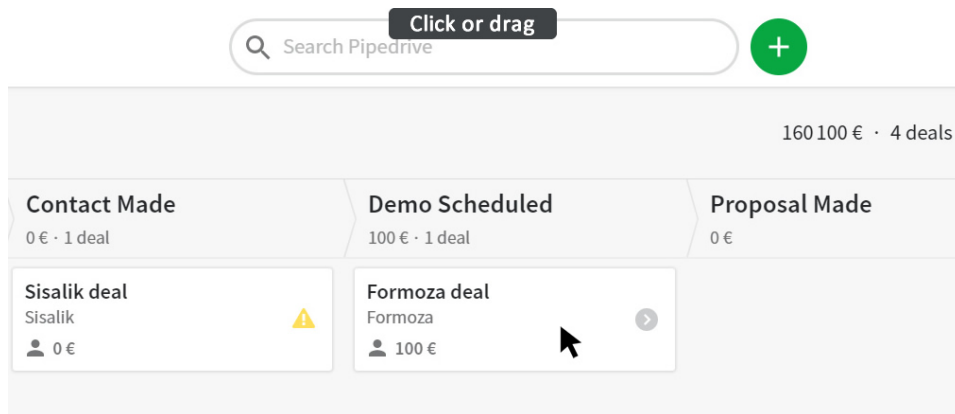
In activities I expected to see a list of 1) **WHEN** and 2) **WHAT** in chronological order. I was able to change the order of columns to get the desired result. But in default configuration date/time was at the other end of the table and not visible (or maybe visible only on big screens). Was there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

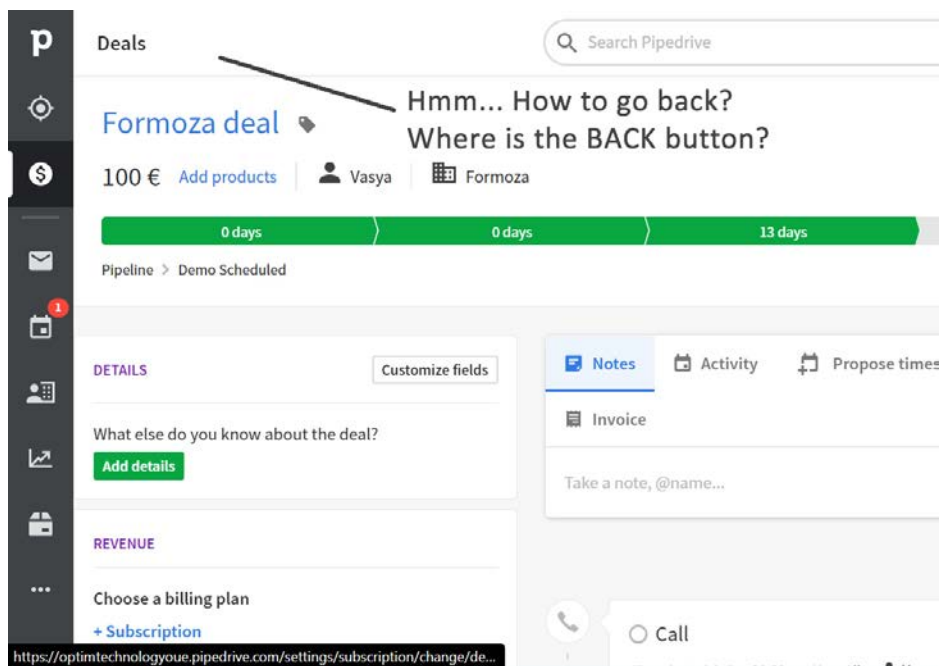
- In order to not overload the interface with regular tooltips, you may make some of these appear at the top/bottom/etc of the page.
- Such an approach also allows creating longer and more informative tooltips.



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.

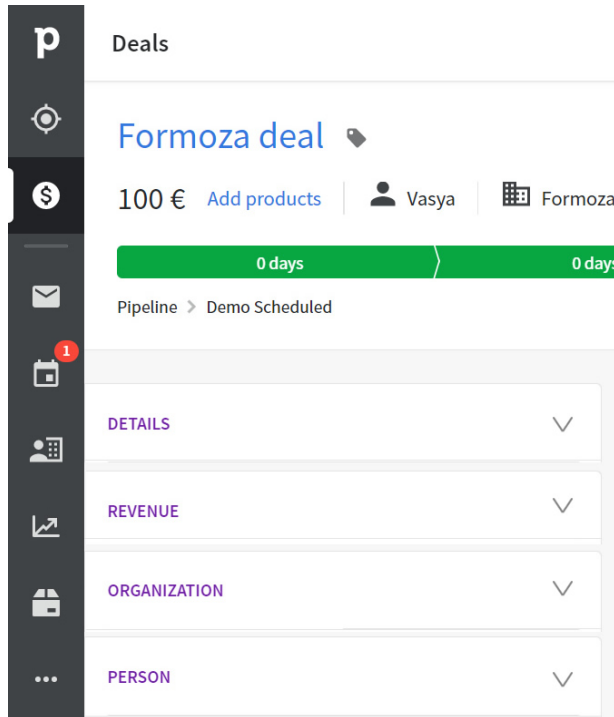
It's very good to support a browser's back button, but for usability, your own back button will clearly make the interface more simple and understandable for new users.



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 changed to "Edit activity", but it 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.

I'm also trying with Nortal, feel free to take a look what I'm suggesting for them:
<https://optim.ee/4nortal.pdf>

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

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

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aivar.alle@gmail.com

See top expert's opinion about my advice on the next page...



Steve Krug <skrug@sensible.com>

saajale mina ▾

Aivar...

P, 29. aug 01:08 (13 päeva eest)



As I asked for his opinion telling that I'll send it to Pipedrive, I guess it's OK to do so.

He is a top expert - try googling "usability best sellers" - just answering me already means something.

TAKE A LOOK AT THE HIGHLIGHTED PARTS

I'm sure you've been checking your email constantly, hoping for word from me. I've been there myself, and I didn't want to keep you hanging.

But unfortunately, you handed me my worst-case-scenario: an email from someone asking for a favor that "seems" reasonable--so I feel like I'm not being a good guy if I don't do what they're asking for—but that's really hard for me to do. It's the kind of email that sits in my inbox forever, haunting me, because I don't know how to respond, for a number of reasons:

1. It's difficult for me to put in a good word for you, because I don't know you. I've always stuck to a policy of only recommending people I know. In fact, I'm not on LinkedIn specifically because for me it would amount to hundreds of people asking me to implicitly "recommend" them by adding them to my network.
2. You say "a couple words from you could help in getting their attention" but apart from recommending you I have no idea what the "couple words" from me would be. Me saying that usability is important? (They don't need me to tell them that.) It seems like only a recommendation would help, and I can't do that.
3. I actually did read your suggestions and look at their site, and the suggestions are good (although probably not things they haven't already thought about themselves) and show effort and initiative on your part but... (See next few points.)
 1. Top expert's opinion about my work (my skills): "the suggestions are good"
 2. Probably they have already considered, don't have the resources etc - he doesn't know that; this is not about my work; probably he wrote this to make all look not like a direct recommendation. Still, my work got approved!
4. One of the things I learned a long time ago:

People almost never appreciate unsolicited advice, matter how good it may be.

I used to offer it occasionally, and in my entire career there was only one case where it was appreciated. (The New York Times thanked me for a suggestion, and made the change that same day.)

You have to understand that there's a lot going on internally at almost any organization. They're probably already seriously overextended, and have more on their plate than they can handle. They have tons of changes they'd like to make, but they don't have the resources—or support from above—to make them. And the fact is, they've usually already thought about the things you're suggesting, and there are reasons why they can't do them.

5. I don't know how you worded your email(s) to them, or what you're looking for from them (I assume you'd like it to be an entre into working for them), but it matters. So here's some unsolicited advice on offering unsolicited advice:
 - Be humble and helpful. Nobody likes some smartass suggesting they know how to do their job better than they do. Consider phrases like "You clearly do an excellent job, and have probably considered some of these things already." Avoid praising your own ideas with words like "Supereffective," "Powerful ideas," and "extra effective." If you're looking for a job, the quality of your advice is important, but you also have to come across as somebody they'd want to work with.
 - Sound like a fan; praise them. Make it clear that you're only making suggestions because they're clearly a market leader and do a lot of great UX/UI work, not because they're a train wreck in need of your help.

Sorry I can't be of more help; I know how hard it is to break into the business. All I can say is, keep trying; you'll get there.

Steve

This is the absolute maximum that I (or anyone) can get via e-mail. They really have a policy of not giving loud & clear recommendations for people from the internet (otherwise they will be overloaded with these requests).

Steve Krug Advanced Common Sense
skrug@sensible.com
