Proposify

Product Research & Planning

Our approach to delivering
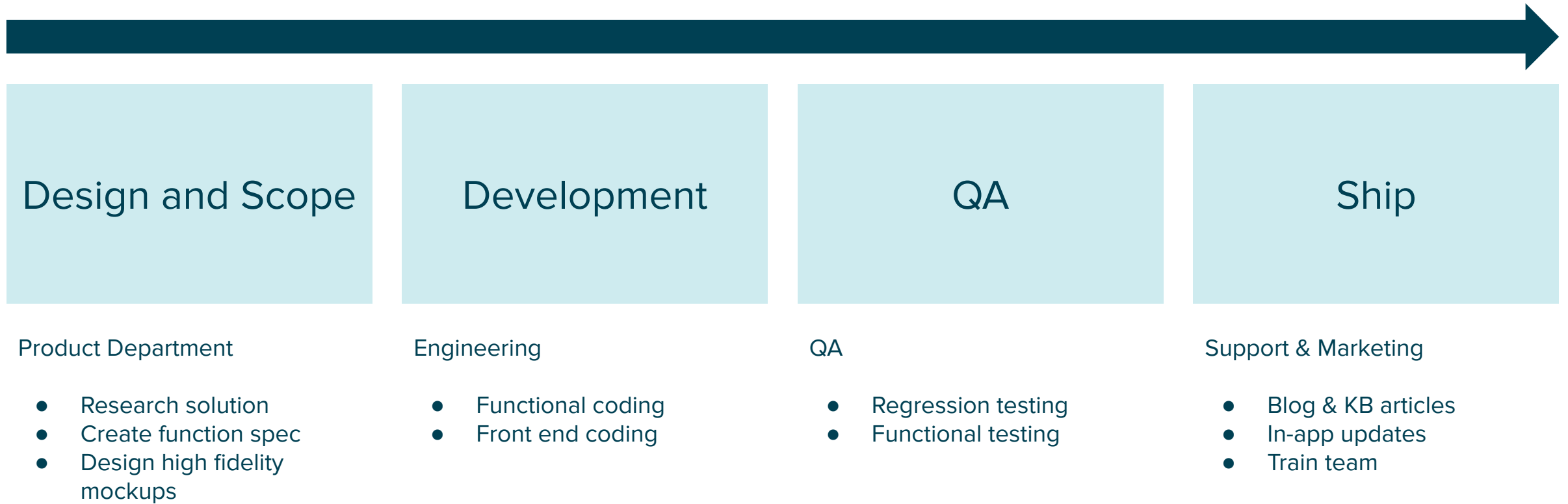product solutions

Some background

Our old process

Design and Scope	Development	QA	Ship

Product Department

- Research solution
- Create function spec
- Design high fidelity mockups

Engineering

- Functional coding
- Front end coding

QA

- Regression testing
- Functional testing

Support & Marketing

- Blog & KB articles
- In-app updates
- Train team

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Issues with this process

- Lack of knowledge transfer from one department to the next

- Lack of cross-departmental buy-in

- Technical "Gotchas" derailing development

- Undesired scope/design changes

- Consistently missed deadlines

- Disruption to customers

- Lack of accountability

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Key learnings

Include	Work closely with Dev's and QA's in the design and planning stages, and add stakeholders into the process
Iterate	Build smaller, increasing estimation accuracy and lowering disruption to the customer.
Measure	Implement Agile methodology to better measure and plan sprints, and introduce accountability for commitments.
Document	Document all research and strategies.

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Case Study / Folders

Theme

- Customers with a large team want to be able to organize their content so they can find content quickly

- Account admins want to control access to content through folders

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Problems

- On average, it takes about 3.5 minutes to hit the library and select a piece of content

- Current system only supports folders in section library

- Current system only supports one level deep folders

- Current systems does not support permissions on on folders

Solution

- Add folders to whole library

- Add in click & drag for selecting

- Update UI
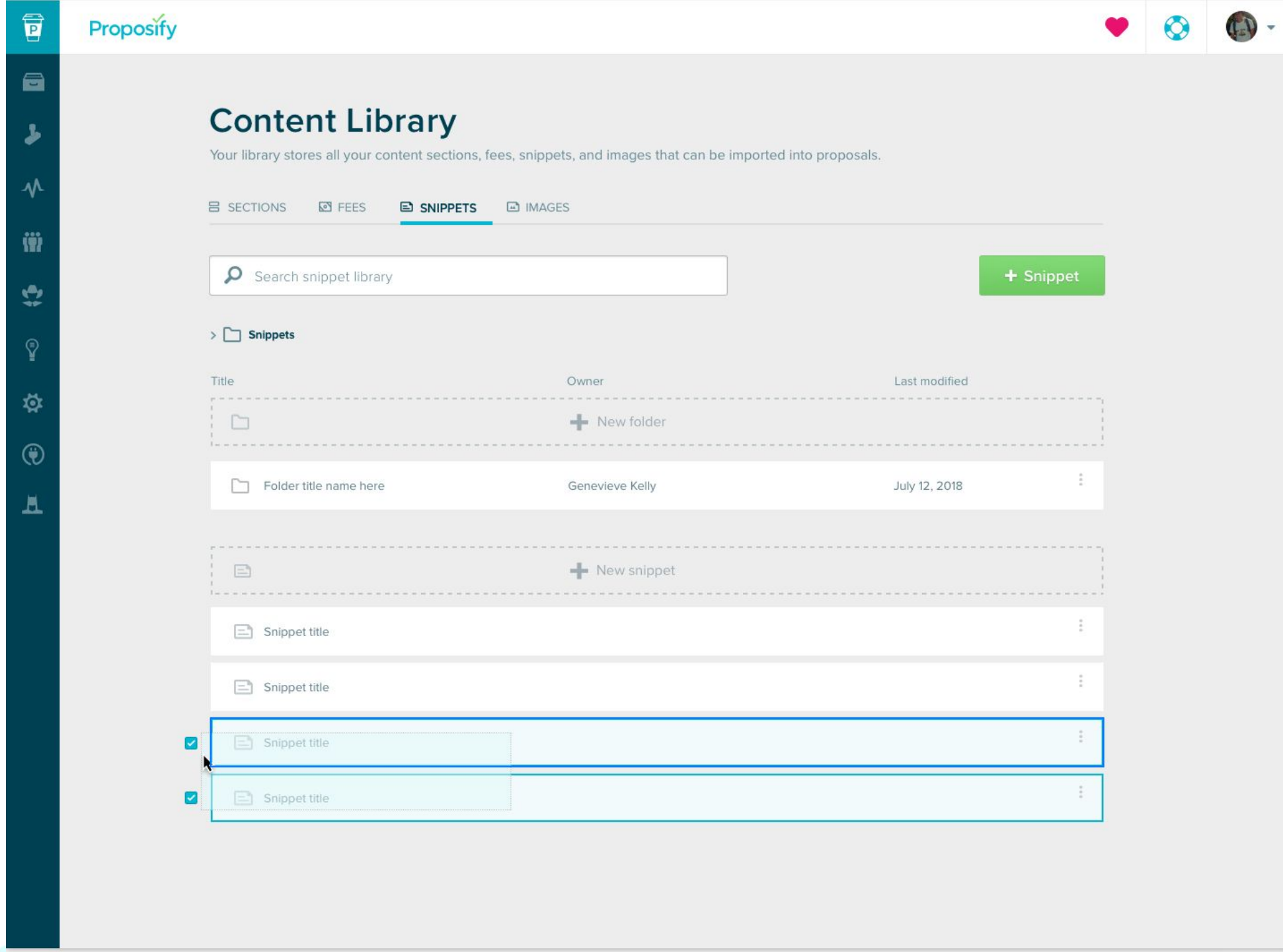
Solution

- Add permissions to folders

- Add in tree sorting

- Update UI
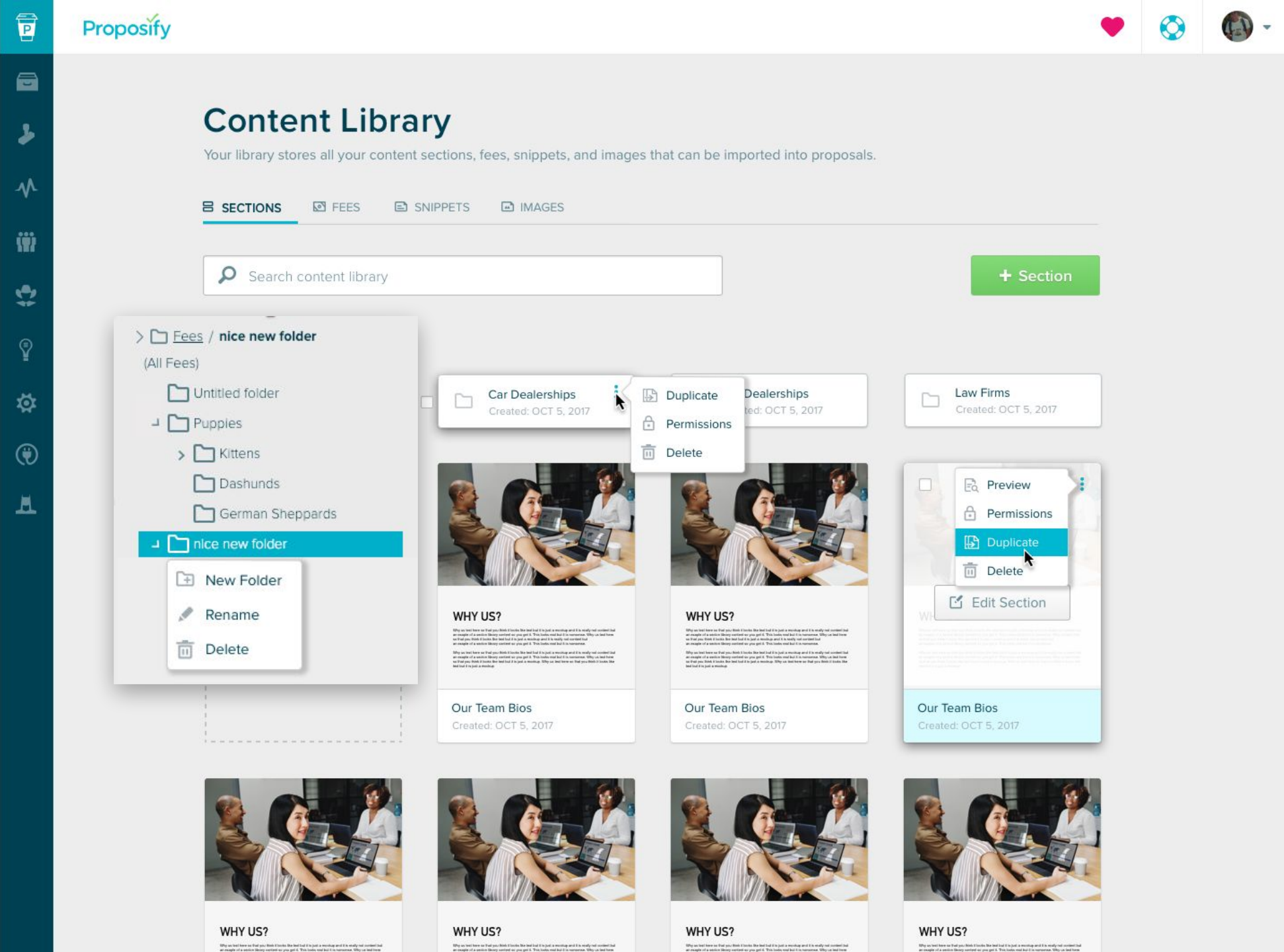
Solution

- Add folders to editor

Solution

- Add folders to templates
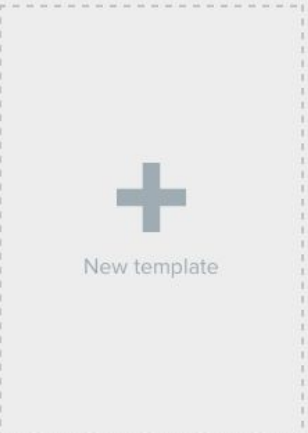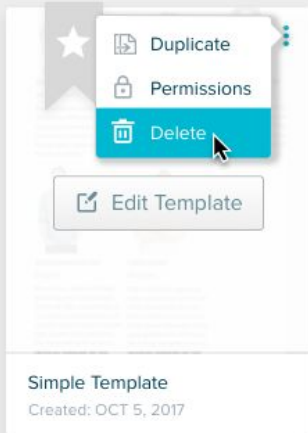
Result of project

The Bad

- Took over 3 months to complete

- Caused major disruption to customers

- Team was highly frustrated by the whole process

- Not all items were completed

The good

- On average, it takes about 2 minutes to hit the library and select a piece of content. A time savings of 1.5 minutes.

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Process revised

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Squads

Product Designer

Developer

Developer

QA

- Shared product theme

- Sit together

- Shared goals & metrics

Repeatable Research Process
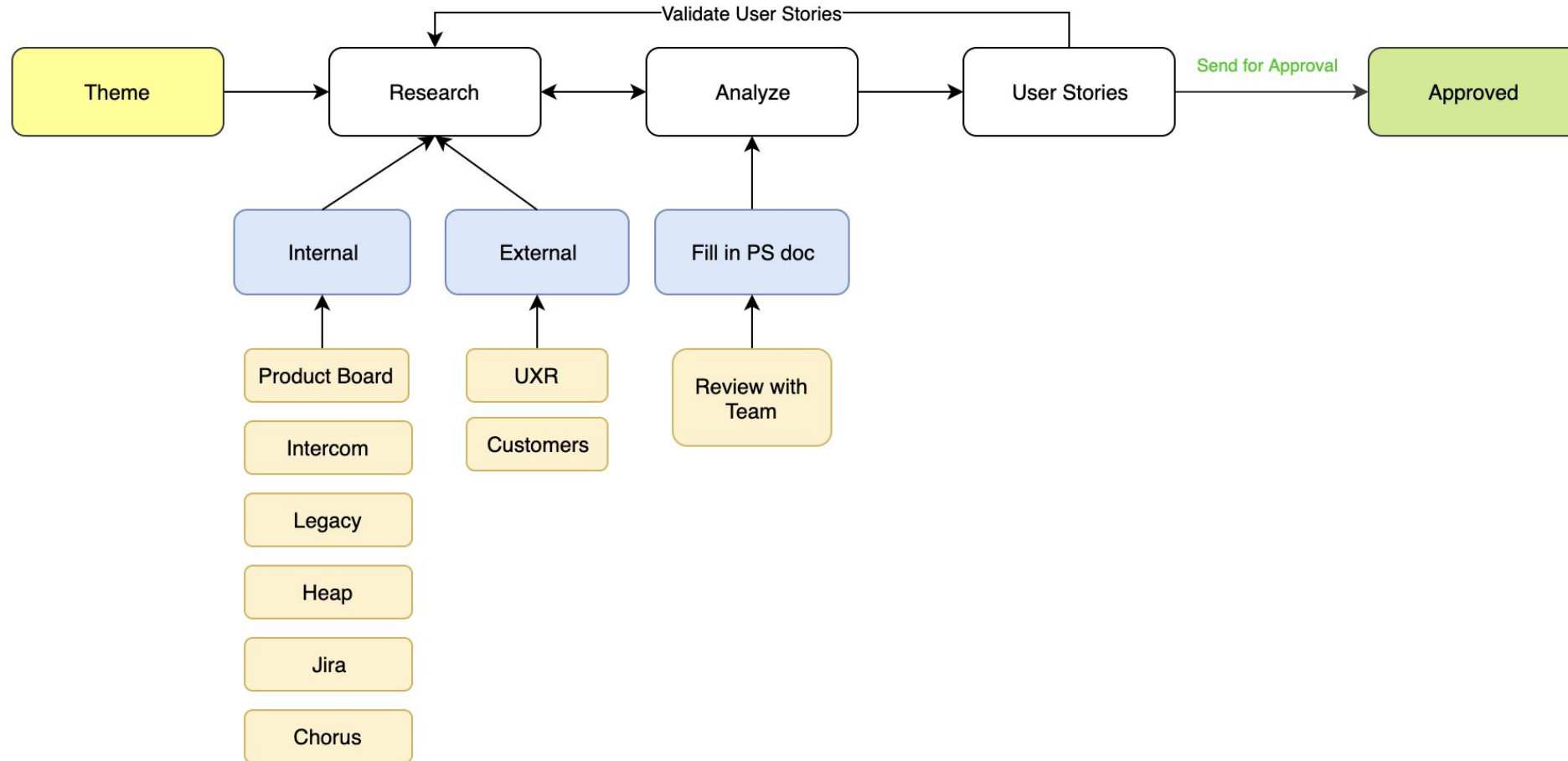
Documented Customer Workflows

- What are they trying to accomplish, and why?

- How are they doing that today?

- Is the result expected?

- What are the main roadblocks, and why?

- How do you know they have reached success, and why?

- What does failure look like?

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Structured Feature Cycles & Agile

RELEASE

RELEASE

RELEASE

WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7

BUG SPRINT

Includes:
Product Research
Backlog reduction

PLANNING

Includes:
Workshopping
Technical Research
QA Test plans

FEATURE SPRINTS

Includes:
Company demos
Marketing prep
Support documents
Customer validation

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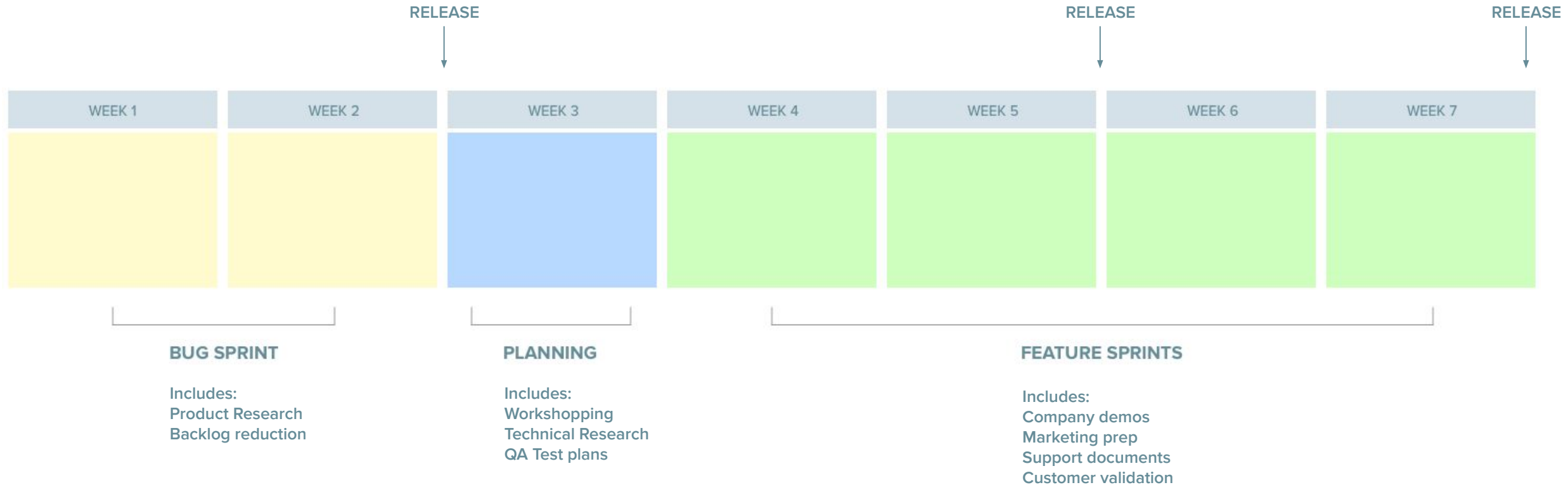
Planning week / Discovery

Product reviews theme and related research including:

- Customer screencasts
- Feature usage data
- User stories

Key outcomes

- Shared knowledge
- Squads buy-in

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Planning week / Workshop

Workshopping is the squad brainstorming session where the work through possible solutions. The brainstorming session is followed up by prioritizing the solutions.

Key outcomes

- Technical research document
- Documented strategy

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Planning week / Planning

During the planning phase, each member does what they need to to prepare for the feature sprints, including:

- Completing technical research
- Pseudo coding
- Mockups
- Solution validation

Key outcomes

- Validate technical and UX solutions
- All Epics, Stories, and subtasks entered in Jira
- Department approval

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Planning week / Tiered Solutions

Skateboard

This is the MVP. This includes only the items needed to solve the base issue.

Bike

These features are embellishments to the bike version and often include UX adjustments or custom UI.

Car

This version is the best in class solution.
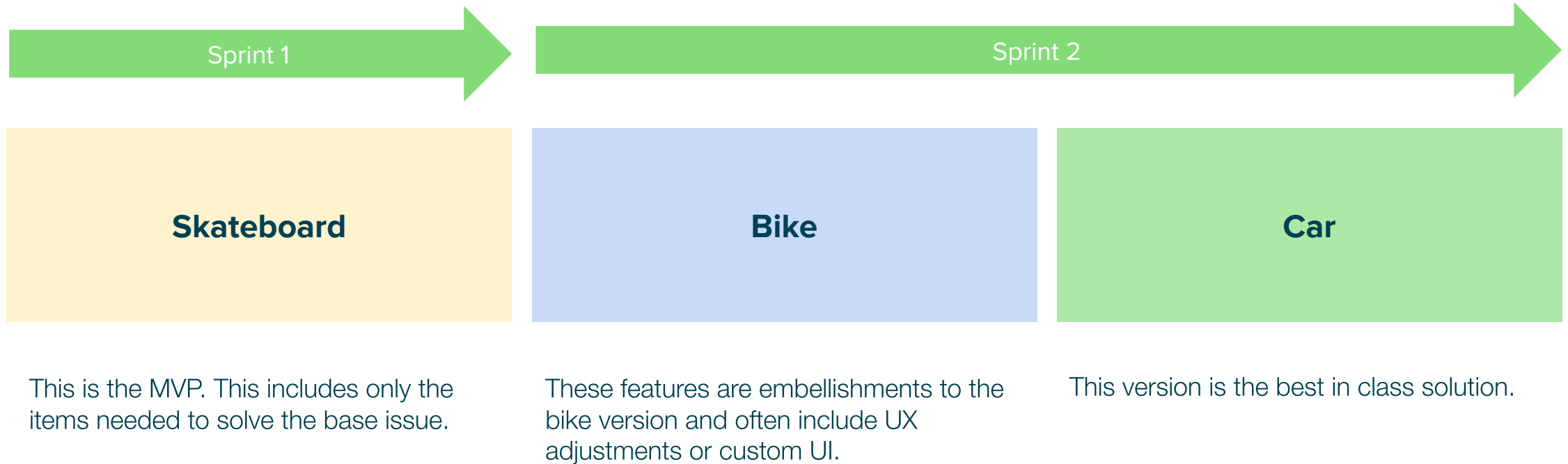
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Planning week / Tiered Solutions

Sprint 1

Sprint 2

Skateboard	**Bike**	**Car**

This is the MVP. This includes only the items needed to solve the base issue.

These features are embellishments to the bike version and often include UX adjustments or custom UI.

This version is the best in class solution.

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Off to the races

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Issues with this process

- ~~Lack of knowledge transfer from one department to the next~~

- ~~Lack of cross-departmental buy-in~~

- ~~Technical "Gotchas" derailing development~~

- ~~Undesired scope/design changes~~

- ~~Consistently missed deadlines~~

- ~~Disruption to customers~~

- ~~Lack of accountability~~

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Case Study / Enterprise accounts

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Theme

App improvements for Enterprise customers. We are working at moving up market to increase our ACV, which means selling to companies with more users.

What are the challenges our current customers with large teams facing?

Uncovered Problems

- Time to load Pipeline increases by 0.25 second per additional active sales rep.

- Current templating and workspaces functionality not meeting customers needs.

- CS needs tools to help onboard large teams. Current takes 15 mins to share a template with one account.

- Sales needs to have a package product to sell into large organizations.

- Each sales team uses their own CRM.

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Solution

- Create system to link accounts to a master account

- Create system for CS to share templates

1 → **2**

Refactoring:
- Partner/Customer Table
- Parter/Type (plan columns)

Linking Accounts:
- Link Accounts Tile
- Invalid ID message
- Success message / Enterprise Icon

- Enter string of IDs
- Separated by returns
- Form submit

Invalid IDs:
- Account doesn't exist
- Account was deleted
- Account is Partner
- Account is Enterprise
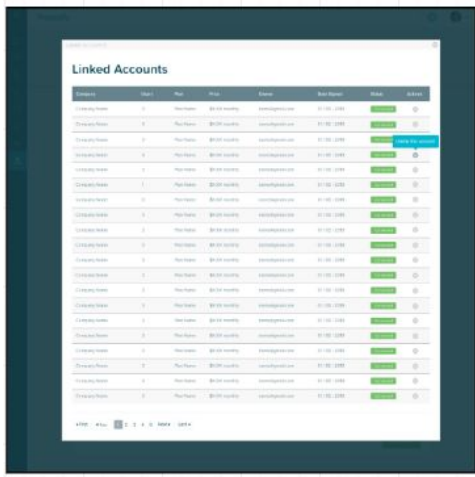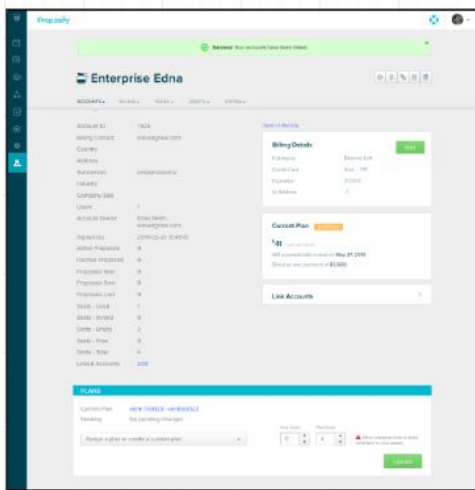- Account is already linked

- Success message
- Enterprise icon

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Solution

- Allow Entreprise accounts to share templates to linked accounts

- Improved UX for linking accounts
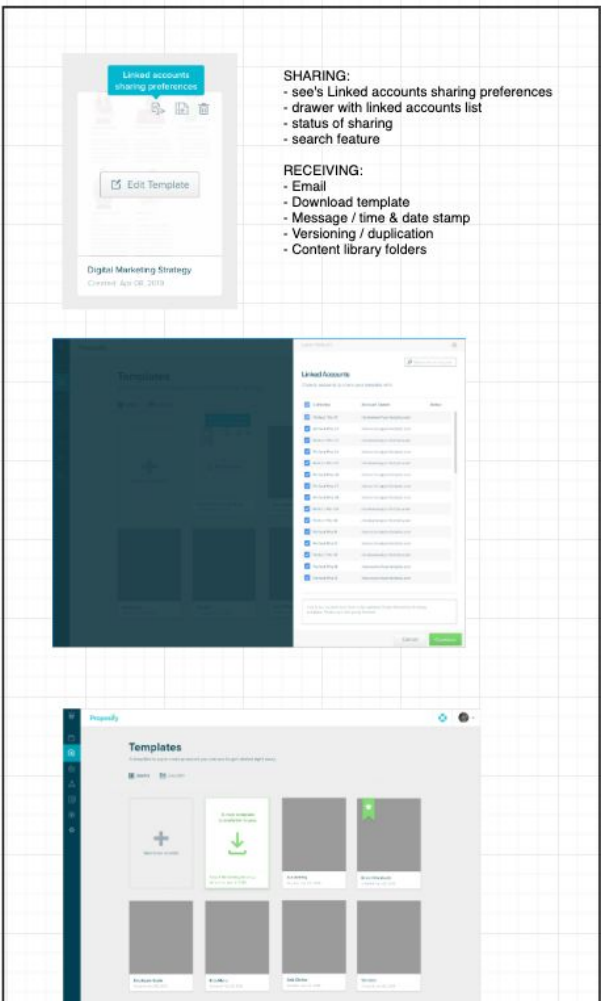
Bike

3
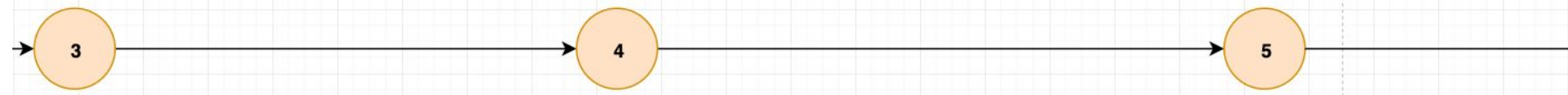
Linked Account List:
- Linked accounts now show in the details list
- Clicking on the number will open a popup giving details of those accounts, and the ability to remove them.

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Enterprise can Template Transfer:
- "if Enterprise" than "can transfer templates"

Note: Enterprise Accounts can technically see their "linked accounts" list populated in the template transfer drawer.

SHARING:
- see's Linked accounts sharing preferences
- drawer with linked accounts list
- status of sharing
- search feature

RECEIVING:
- Email
- Download template
- Message / time & date stamp
- Versioning / duplication
- Content library folders

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Confirm Linked Account:
- Show valid / invalid IDs
- Ability to deselect accounts

(Build last)

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Solution
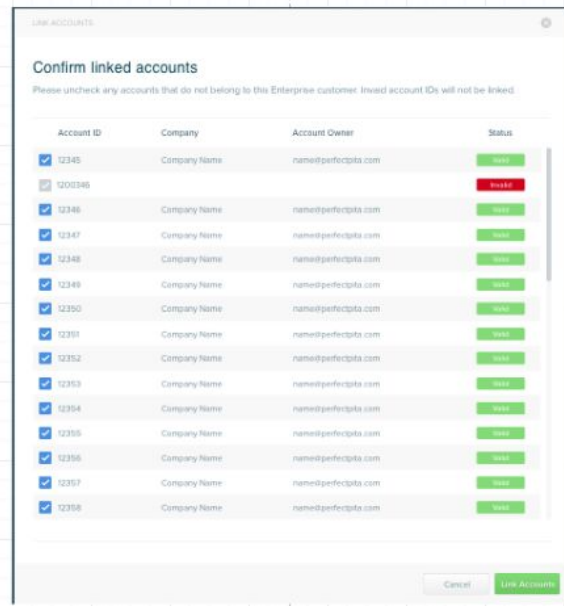
- Create portal for Enterprise

- More UX improvements for linking

Car

6

7

Enterprise Portal:
- Enterprise Admin portal
- View list of linked accounts
- Activity Health details?
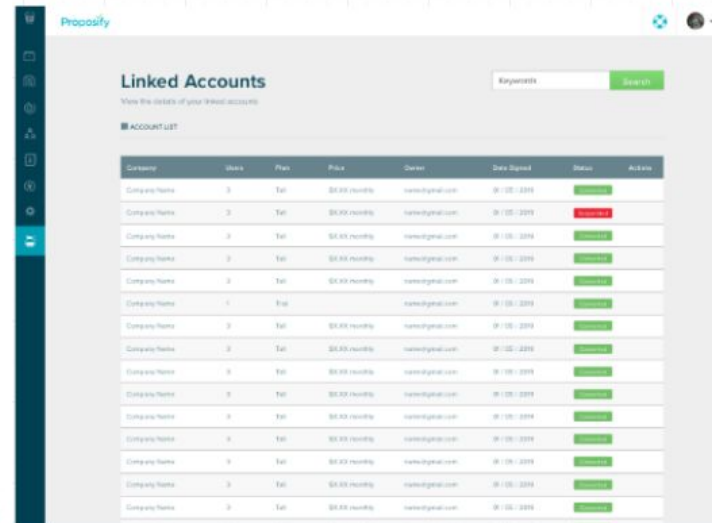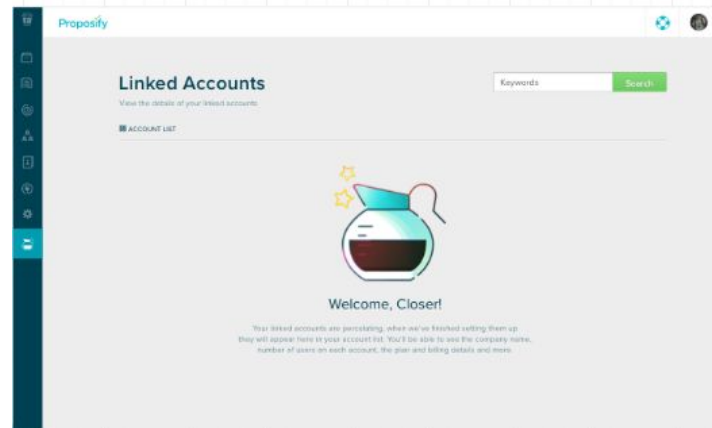
Add New Linked Account:
- Add the ability to create a new inked account from this tool

Activity Health: IDEAS

look at the data table and see
what we can leverage for Enterprise customers.
Balance with what the effort is to show the data.
- Proposals sent?
- Pipeline?
- Workspaces?
-

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Result of project

The Bad

- Project took on extra sprint to complete. 6 weeks in total

- Both the Bike and Car were built in the projects master branch

The good

- Project took on extra sprint to complete. 6 weeks in total

- Skateboard, Bike, and Car were built and shipped

- Takes about 30 seconds to transfer a template to any number of accounts

- Large team accounts are very happy to solutions

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Questions?

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