Internal User interview

May 2023

Introduction [5 mins]

Thanks for accepting and taking the time to meet with us today. I'm Tamer Okail. I'm a product designer at Olly Olly and joining us on this call is a colleague Sam Wieland, our Product Operations Manager.

We are from Olly Olly's product team, and the purpose of today's conversion is to understand your workflow challenges, and pain points in order to learn more about your experience.

There are no right or wrong answers, just answer as openly and honestly as you can.

The interview will take about 45mins. All information will be kept confidential and not attributed at the individual level.

Lastly, before we get started, we do like to record these sessions. These recordings are for internal use only and will not be shared outside of the project team. So if it's ok with you I'll press record and we can get started.

Warm-up [5 mins]

- To get started, could you tell us a little bit about yourself?
- Can you tell us what you do?
    - Marketing manager at accent awnings. They've been in business for 44 years.

- BEcome marketing manager over a year ago, been with the company longer
- How long have you been doing this?

Workflow tasks, challenges, and pain points. [20min]

In the next part of our conversations, we aim to understand the daily workflow tasks, challenges, and pain points.

1. What is your typical daily workflow?
   a. Main goal is generating leads, from all different channels. They rely a lot on phone calls, tracking numbers are helpful for tracking. Then scheduling. Then meeting in person, seeing the project location, digital quote, order comes in and they manufacture.
   b. Appointments plus for scheduling. They don't have a CRM
   c. Appointment tool has all of the staff schedules and they have access to it
   d. They also have a work-order system and need to manually add work-orders there once an order is created
   e. Sales team is scheduling appointments
2. Are there any particular tasks or activities that you find challenging?
   a. Tracking where leads are coming from, it's mostly a manual process
3. What do you think are the most important things to focus on in order to be successful in your job?
4. What do you think are the biggest opportunities for improvement in your current daily workflow?
   a. CRM that recognizes phone number, auto populates the account based on phone number and tracks the customer journey.
   b. They don't have digital signatures or a way for clients to access anything directly
   c. People are stuck in their ways and it would be a lot of work to migrate data to a new system

Lead generation and management. [20min]

We want to explore How you generate and manage leads/clients

1. How do you currently manage incoming leads or job requests? (Follow up: what tools or systems do they use?)
2. How do you typically schedule appointments with customers? (Follow up: Do you use any scheduling software or tools?)
3. How do you currently go about getting online reviews from your customers? (Follow up: What strategies have you found to be most effective in getting customers to leave reviews?)
   a. They have a tool called "get more reviews"
   b. Once an order is installed and completed, someone sends over a batch of installs that have been completed and someone else inputs their info into the tool to request a review from their customers. They really like their review system
4. What metrics do you currently track to measure the success of your marketing efforts? (Follow up: How do you use marketing data to inform your decision-making?
   a. The rank checker tool we're using isn't working. They don't feel like they have is giving accurate data.
   b. A lot of blank fields, it doesn't give data, confusing
   c. Just overall lack of visibility
   d. Confused by when a keyword isn't ranking well, what on the website is causing that.
   e. Doesn't like not having direct contact with SEO team. Disconnect between teams
   f. More connectivity to the site itself, ability to change website based on ranking data

g. ROI focus on software, showing leads, lead value, calculates ROI.

     i. Closing rate, ROI, cost per lead. Tracking

Wrap up [5min]

1. If you had a magic wand, what would you change for the current workflow or tools?
2. Is there anything we haven't talked about today that you think would be valuable to know?

Thank you for taking the time to speak with us today. Your insights and experiences are invaluable in helping us design solutions that truly meet expectations.

Other notes:

Showing the value, doing a good demo, will help to get business owner onboard

THeir quotes are so custom, they need so many fields and options to generate quotes

They don't do email marketing because they don't want to annoy their customers

Would love to have a tracked list of changes, whether it's changes to the campaign (seo or ads) or website changes.