Usability Study
TopOPPS vs. Salesforce

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I BACKGROUND

TopOPPS provides sales pipeline visibility tools that plug into business's Customer Relationship Management system (CRM). With the backing of Cultivation Capital, Jim Eberlin founded TopOPPS in early 2014 after his successful exit from another CRM related sales analytics company. In the short time since its founding, TopOPPS has already risen to the new standard for sales pipeline predictability tools.

TopOPPS software is designed for speed and ease-of-use. At its core, TopOPPS provides a robust sales reporting dashboard that allows sales managers to make quicker and more accurate decisions using real-time data. TopOPPS was founded based on a need in the market for predictable analytics that go a step beyond unwieldy CRM dashboards to drive valuable and actionable insights. Currently, TopOPPS plugs-in to Salesforce.com, the worldwide leader in CRM.

TopOPPS tasked our team to study the statistical differences between test subjects using Salesforce.com as a stand-alone product versus using TopOPPS as a plug-in to Salesforce.com. In particular, TopOPPS requested a study on the usability of the two tools with empirical evidence on the number of clicks and amount of time it took users to perform different tasks in the sales process under each tool. TopOPPS plans to use our quantitative and qualitative findings as part of its marketing strategy and for further software developments.

The following report details our team's methodology, findings, conclusions, and recommendations.

II   EXECUTIVE SUMMARY

TopOPPS requested this consulting project to identify strengths and weaknesses in the user interface of its Sales Pipeline Analytics tool based on relevant user demographics, and to develop definitive quality statements of TopOPPS over its competitors. The results of this project should provide TopOPPS with relevant and robust data points and analysis that allow the company to validate its marketing strategy and open avenues for future product development.

To achieve our objectives and provide actionable recommendations, our team conducted surveys to compare and contrast TopOPPS with Salesforce.com. We designed a quantitative usability test to measure key software usability features such as time and number of clicks to complete tasks in the sales pipeline. We conducted these tests in a scientifically consistent manner such that we were able to yieldd reliable, hard data points. We also designed and administered qualitative surveys that uncovered trends in user feedback and experience for TopOPPS, which could be used to shape future marketing efforts and to better inform the development team for future efforts.

The following are our key findings, conclusions, and recommendations arising from our usability testing and surveys:

- 79% of test subjects prefer TopOPPS over Salesforce
- Across 15 Sales Pipeline tasks, TopOPPS required 50 fewer clicks than Salesforce
- Across 15 Sales Pipeline tasks, TopOPPS required 49 fewer seconds to complete
- Test subjects spent 40-50% less time and needed 40-82% fewer clicks when generating opportunity pipeline visibility reports in TopOPPS vs. Salesforce
- Test subjects spent 20-38% less time and needed 14-21% fewer clicks when updating opportunities in TopOPPS vs. Salesforce
- Top 5 words subjects would use to describe different tasks in TopOPPS:
    - Updating Opportunities: Easy To Use, Familiar, Intuitive, Effective, and Straight Forward.
    - Sales Pipeline Visibility: Useful, Clean, Clear, Organized, and Timesaving
    - Sales Rep Performance Reporting: Confusing, Time-Consuming, Complex, Difficult, and Busy
- TopOPPS should use the data we collected in its marketing materials to emphasize the decisive efficiency advantages of its tool over Salesforce
- TopOPPS should investigate methods, based on our data, to improve the navigation and layout of the sales rep performance reports, as this was negative outlier in our testing

III   OBJECTIVES

A   Determine Statistical Advantages and Disadvantages of TopOPPS

While TopOPPS has had a successful launch, it still faces the same challenge faced by most start-ups which is a lack of customer data points. TopOPPS targets sophisticated business customers who like to have hard numbers and facts before investing in business software.

Our goal is to validate marketing materials that state TopOPPS offers:
- Increased rep efficiency, morale and CRM usage;
- Increased accuracy, quality, and predictability of your forecast; and
- Big data analytics offering deeper insight and understanding of your sales cycle

TopOPPS commissioned our team to conduct studies on the amount of time and clicks it took test subjects to perform routine sales tasks using both Salesforce and TopOPPS. In conjunction with these quantitative surveys, we have designed and administered qualitative surveys centered focused on the usability of TopOPPS versus Salesforce.com. The qualitative surveys measured users subjective experience and reaction while using each system.

In addition, we recorded relevant demographic information, such as experience in sales and with Salesforce, on our test subjects to provide further insight for TopOPPS. TopOPPS may be able to use this demographic information paired with the quantitative and qualitative results to more effectively segment the market.

B   Identify Strengths and Weaknesses of TopOPPS User Interface

TopOPPS also asked our team to identify and summarize the TopOPPS user interface's strengths and weaknesses based on the qualitative and quantitative data. TopOPPS brought us already robust and strong analytics tool and asked us to fully study it to identify both its weak points and strong points.

Having a better understanding of what users enjoyed about TopOPPS would allow the company to further emphasize these traits in its marketing strategy. While seeing where users thought the tool fell short would allow TopOPPS to make adjustments to improve the user experience. Seeing both the positives and negatives provides fodder to drive sales further.

To achieve this objective we relied heavily on the statistical advantages and disadvantages discussed above, as well as the qualitative responses of the users' experiences.

C   Develop Definitive Statements of Quality for TopOPPS over Competition

Lastly, TopOPPS requested we consolidate our findings and provide definitive conclusions on the Quality of TopOPPS compared to the competition, Salesforce. Having concrete feedback based on objective, third-party information would allow the company grade itself and make any necessary adjustments in marketing or development.

IV   METHODOLOGY
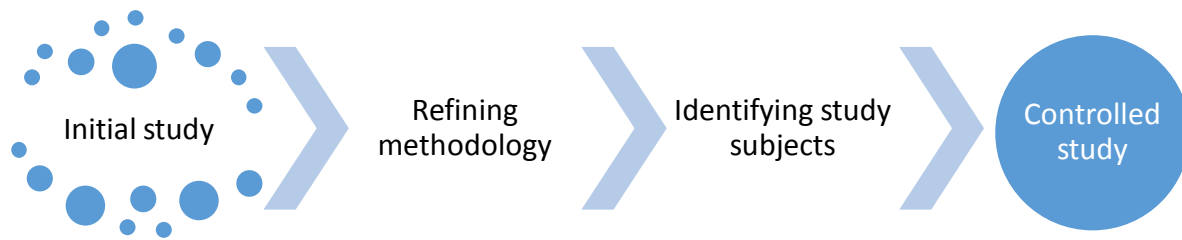
A   Initial study and refining methodology

TopOPPS provided the team with 15 tasks relating to managing sales opportunities that could be performed in Salesforce and TopOPPS. Each member of the team independently took the study and recorded the number of clicks and time for each task. We then met and discussed each of the tasks that we struggled with and what the best answer should have been. This ensured that we had a common understanding of the task requirements.

After adjusting the task requirements slightly we performed an initial, informal study with three study subjects to obtain feedback on the test. Their feedback was invaluable to refining the methodology for the controlled study as described below. We also used their responses to formulate a qualitative survey to formalize the process of obtaining general feedback in the test.

Following this period of refinement we had a second meeting with TopOPPS to discuss the proposed methodology for the usability study. We clarified the objectives of the project, agreed to the testing methodology and gained feedback on the types of study subjects they were looking for.

B   Identifying usability study subjects

i.   Ideal subjects

The team recognized that the usability study subjects had to be representative of the target population of TopOPPS users. In collaboration with TopOPPS we identified several key characteristics that we would look for in identifying usability survey subjects. They were:

- Sales experience – especially focusing on those with:
    o Dynamic sales cycle – ie. a level of variation in the sales pipeline from identifying a qualifying opportunity to closing the sale
    o Executive or management experience in sales
- Salesforce experience – we recognized that the subjects we could likely obtain to do the testing would have a wide range of prior experience in salesforce. Instead of limiting ourselves to experienced users, we agreed with TopOPPS to control for the level of experience in the analysis of the results.
- Target industries included pharmaceuticals, financial services, IT and software development

We actively focused on recruiting study subjects that best represented this set of desired characteristics to ensure our results were both robust (the study subjects had some idea of what they were meant to be doing) and relevant (represented a target user of TopOPPS).

ii. Recruitment methods

Several methods were employed to find potential study subjects including:

- People in our personal networks that met the listed criteria (65%)
- Referrals from our personal networks to other companies (15%)
- Flyers in the business school and law school requesting study subjects (10%)
- Email sent out to all MBA students requesting study subjects (10%)

It was initially difficult to find people that were willing to commit an hour to undertake our usability study. Two incentive programs were negotiated with TopOPPS to ensure we could find enough study subjects that met the desired set of characteristics:

- 15 Amazon Gift Cards of $10 value each
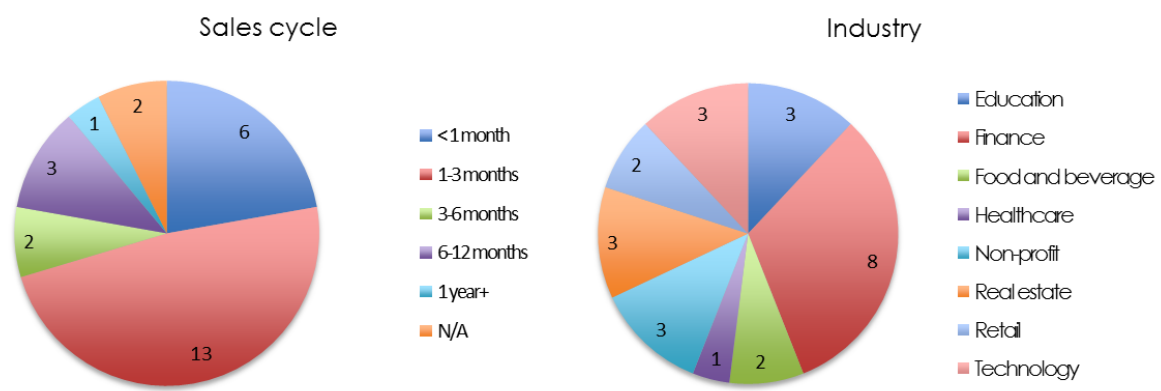- 30 day free trial of TopOPPS

iii. Demographics of subjects

We conducted the usability study with 25 subjects with a diverse range of experience. More than half of the subjects had prior Salesforce experience but almost all of them had prior sales experience. The four subjects with no sales experience were MBA students with a background knowledge of sales.

Sales experience

Salesforce experience
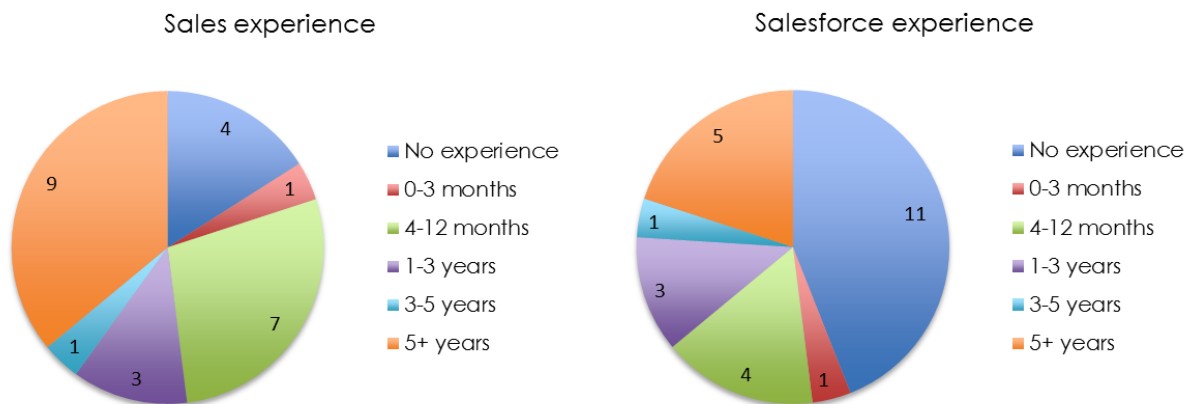
56% of the subjects worked directly in a sales role. The majority of the other subjects worked in a position that required sales experience or use of salesforce software. The most heavily represented age group were young working professionals or graduate students aged 23-30. The older participants were mostly sales executives and sales managers.

Company position

Legend:
- Salex Executive — 5
- Sales Manager — 3
- Sales Representative — 5
- Sales Administrator — 1
- Other — 11

Age

Legend:
- 18-22 — 3
- 23-30 — 13
- 31-40 — 6
- 41-50 — 2
- 50+ — 1
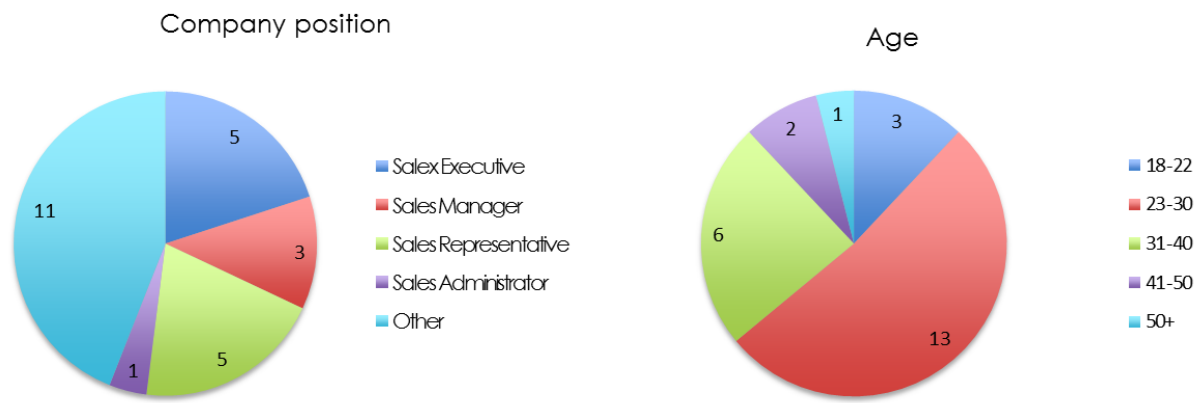
The usability study subjects also came from very diverse range of industries. The most significant portion came from a finance background in either financial services, investment advisory or analyst positions. Every subject that worked in sales had a sales cycle that could be considered dynamic.

Sales cycle

Legend:
- <1 month — 6
- 1-3 months — 13
- 3-6 months — 2
- 6-12 months — 3
- 1 year+ — 1
- N/A — 2

Industry

Legend:
- Education — 3
- Finance — 8
- Food and beverage — 2
- Healthcare — 1
- Non-profit — 3
- Real estate — 3
- Retail — 2
- Technology — 3

B   Controlled Usability Study

Our primary focus in conducting the testing process was to ensure that every team member administered the test in an identical way to eliminate bias from the results. In order to ensure consistent test-taking our team met and agreed upon a standard run sheet to follow when administering the survey. A copy of the Survey Run Sheet is included in Appendix A. The testing proceeded strictly according to the checklist on the run sheet in the following stages.
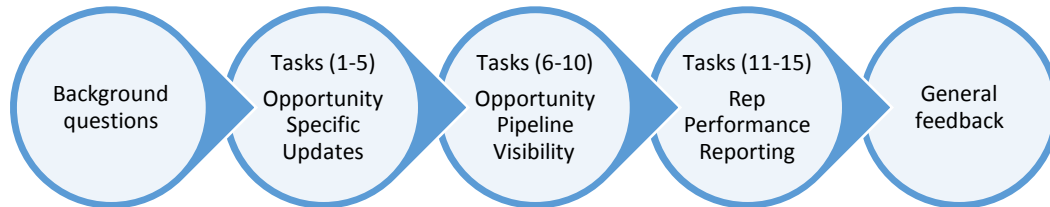
i. Orientation

At the start of the usability testing we tried to ensure that each survey participant, irrespective of their position or their level of experience in salesforce, was given the same orientation to the test. The orientation aimed to make every subject feel confident about providing candid feedback. We made a note to open the testing by explaining the following items to the subjects:
- Purpose of the test – the purpose is to test the usability of TopOPPS and not the subject's personal capabilities. The test results were analyzed by the team for the purposes of product development and marketing.
- Independence – we are not employees of TopOPPS, we are undertaking a consulting project for them. We did not have any prior input into the development of the software.
- Confidentiality – all results are to be kept anonymous and confidential including the content of any open discussions.

The orientation was also our opportunity to ensure that every subject had the same minimum introduction to Salesforce and TopOPPS. We considered this to be important because many users had a degree of experience using Salesforce but no experience using TopOPPS. Without a basic introduction users might have also done better at later tasks than earlier tasks as their familiarity with the software increased. We took special care not to show the subjects how to perform any specific task in the usability testing. The introduction was general and covered the following functionality and concepts in both Salesforce and TopOPPS:
- Overview of the different tabs in salesforce and how to access TopOPPS
- Overview of the main menu tabs to the left in TopOPPS split into opportunities, reports and settings for customization
- Explanation of how an opportunity moves through the sales pipeline
- Explanation of when an opportunity forms part of the sales forecast

ii.   Administering the usability test

After the moderator had completed the orientation script, we commenced the testing process. The usability test proceeded through five stages.

Background questions

Firstly, we asked the subject to fill out the first page of questions in the qualitative survey about the subject's background and experience. These questions allowed us to capture key demographics about the subject including their position, industry, experience in sales, experience in salesforce and the length of their typical sales cycle.

Opportunity specific updates

Secondly, the subject was asked to complete five tasks in Salesforce and TopOPPS related to updating information about a specific opportunity. Specifically they were asked to:

1. Update an opportunity amount to $500,000
2. Move the opportunity close date to 10/02/2014
3. Advance the opportunity to the next stage
4. Add a task to the opportunity
5. Update a custom field for a specific opportunity

The moderator recorded the number of clicks and the amount of time it took the subject to complete each task. We did not reset to the homepage between each task in order for the usability testing to approximate how a subject would perform the tasks normally. The team also agreed upon a set of standards as to when a click would count or not. After the subject had completed the five tasks we asked for some feedback on their user experience. The subject was asked to:

- Identify adjectives from a list that described their experience performing the tasks
- How they would rate the process of updating an opportunity in TopOPPS
- How frequently they would update opportunities in TopOPPS compared to Salesforce

The methodology behind these qualitative questions was to get some feedback about the user's experience, obtain an overall rating of a particular feature in TopOPPS and get an idea about whether and how much the subject preferred to use TopOPPS to perform a certain task. The second and third set of five tasks proceeded in an identical manner with the same basic methodology.

Opportunity Pipeline Visibility

The subject was asked to perform the second set of five tasks in Salesforce and TopOPPS related to the visibility of the opportunity pipeline. Specifically they were asked to identify:

6. How many opportunities were in the pipeline
7. How many opportunities could be committed to the forecast
8. How many opportunities did we have that were worth more than $600,000
9. What was the total value of opportunities in the pipeline
10. What type of opportunities did we have the most of in the pipeline

After the subject had completed the five tasks they were then asked again for some feedback on their experience. We asked the subject to:

- Identify some adjectives to describe their experience analyzing the opportunity pipeline in TopOPPS
- How they would rate the process of generating reports about the pipeline in TopOPPS
- How visible the opportunity pipeline was in TopOPPS compared to Salesforce.

Rep Performance Reporting

The subject was then asked to perform a final set of five tasks relating to report and review the performance of sales reps in Salesforce and TopOPPS. Specifically they were asked:

1. Which rep had the most opportunities committed to the forecast
2. Which rep had the most revenue committed
3. Which rep had closed the most opportunities this quarter
4. Which reps were in danger of not reaching their quota by the end of the quarter
5. How many reps had deals expected to close this quarter

After the subject had completed the five tasks they were then asked again for some feedback on their experience. We asked the subject to:
- Identify some adjectives to describe their experience analyzing rep performance in TopOPPS
- How they would rate the process of identifying a rep's performance in TopOPPS
- How frequently they would track rep performance in TopOPPS compared to Salesforce

General Feedback

In the final stage of the usability testing we asked the subjects for some overall feedback about TopOPPS. These general, open-ended questions were designed to capture any other information that subject wanted to provide about TopOPPS such as:

- What the subject liked the most
- What the subject liked the least
- What additional features the subject would most like to see in
- An overall rating of the product

iii. Debrief

At the end of the usability testing we made a point of thanking the subject for their participation and asked how we could better administer the test in the future.

In some cases the subject received an Amazon gift card for their participation. We also offered to link the participant with TopOPPS if they wished to obtain a free 30 day trial of the software.

V   RESULTS

We conducted surveys with the users for both the TopOPPS and Salesforce systems. During the surveys, the users were given a background on the Salesforce and TopOPPS systems and were then asked to perform certain tasks. Results were collected on:

1. Quantitative - Clicks and Timings of the tasks.
2. Qualitative - Demographics and Subjective Feedback

For quantitative results, we grouped the subjects and their responses into three groups based on their experience using Salesforce:

- Inexperienced (0-3 months)
- Experienced (3 months to 3 years)
- Very Experienced (more than 3 years)

For qualitative results, we grouped the subjects and their responses into five groups based on their experience in sales:

- Sales Representative
- Sales Executive
- Sales Manager
- Sales Administrator
- Interns

Our results showed demonstrated that the competitive advantage of TopOPPS over Salesforce is clear - users spend less time and searching for a desired information, while the number of clicks needed to complete a task also decreased using TopOPPS versus Salesforce. Users therefore spend less time and experience less frustration using TopOPPS compared with Salesforce.

C   Quantitative Analysis – Time

The chart below shows the percentage differences in the times it took users (grouped by experience level) to complete each of the fifteen specific tasks. Positive percentages indicate TopOPPS was quicker than Salesforce, while negative percentages indicate TopOPPS was slower.

Time	Updating Opportunities – % Time Advantage for TopOPPS					
Experience Level	Task 1	Task 2	Task 3	Task 4	Task 5	Total
Inexperienced	30.00%	45.67%	44.09%	40.00%	34.45%	38.26%
Experienced	35.83%	-18.52%	37.61%	52.78%	-36.97%	19.88%
Very Experienced	6.52%	44.12%	49.66%	22.91%	45.93%	33.81%

Time	Opportunity Pipeline Visibility - % Time Advantage for TopOPPS					
Experience Level	Task 6	Task 7	Task 8	Task 9	Task 10	Total
Inexperienced	67.36%	78.21%	27.02%	-14.95%	54.58%	41.78%
Experienced	65.90%	79.65%	41.67%	-174.07%	77.93%	50.82%
Very Experienced	73.64%	35.16%	-7.91%	27.38%	77.24%	50.77%

Time	Rep Performance Reporting - % Time Advantage for TopOPPS					
Experience Level	Task 11	Task 12	Task 13	Task 14	Task 15	Total
Inexperienced	9.58%	5.42%	-17.45%	13.01%	-30.15%	1.08%
Experienced	32.20%	-28.75%	18.95%	13.88%	37.86%	18.28%
Very Experienced	0.00%	21.03%	-24.70%	-13.58%	-12.67%	-7.47%

The overall time results were mostly positive for TopOPPS, with users completing all tasks more quickly in TopOPPS than in Salesforce with only one exception (Very Experienced, Rep Performance Reporting).

A particular highlight for TopOPPS was the speed at which users moved through the Opportunity Pipeline Visibility tasks. In this category, experienced and even highly experienced Salesforce users were able to gain pipeline visibility 50% quicker in TopOPPS compared with Salesforce. Even with much less experience using TopOPPS, these Salesforce experienced users were able to perform much more efficiently in pipeline visibility tasks.

There were also some shortfalls for TopOPPS in time efficiency. In particular, the following tasks gave users particular trouble in TopOPPS (over 33% slower):

- Task 5 - "Update a custom field for a specific opportunity" [37% slower for experienced users than Salesforce]
  - o Based on user feedback, this was likely due to unclear wording of the task
- Task 9 – "What is the total value of the deals in my pipeline?" [174% slower for experienced users than Salesforce]
  - o Users commented that it would be useful to have the total amount of deals in the pipeline in a clearly identifiable area, such permanently next to number of deals in the pipeline.

Another somewhat negative trend we found was that very experienced Salesforce users had difficulty with the Rep Performance Reporting tasks in TopOPPS:

- Task 13 – "Which rep has closed the most opportunities this quarter?" [25% slower in TopOPPS]
  - o Based on user comments, this variation was mostly due to them not being able to locate a report where they could scan across all sales reps, as the case was in Salesforce. Instead, users had to click each on sales rep individual to find important statistics.
- Task 14 – "Which rep(s) is in danger of not reaching their quota by the end of the quarter?" [14% slower in TopOPPS]
  - o Again, users commented that it was difficult to compare reps to one another in TopOPPS.
- Task 15 – "How many reps have deals expected to close this quarter? [13% slower in TopOPPS]
  - o Users were able to find precise numbers relatively easily in Salesforce, but found the charts in TopOPPS to be confusing.

It's important to note that the majority of Very Experienced Salesforce users also had over five years of sales experience and held sales management or executive roles. These are key demographics for TopOPPS, as these senior sales leaders will most likely be making new sales pipeline software investment decisions.

Overall, when it came to efficiently using time in the sales pipeline, TopOPPS performed excellent with Opportunity Pipeline Visibility tasks, quite well with Opportunity Updates, but could use improvements for Rep Performance Reporting in terms of usability efficiency.

C   Quantitative Analysis – Clicks

The chart below shows the percentage differences in the number of clicks it took users (grouped by experience level) to complete each of the fifteen specific tasks. Positive percentages indicate users required fewer clicks in TopOPPS than inSalesforce, while negative percentages indicate TopOPPS required more clicks.

# Clicks	Updating Opportunities - % TopOPPS Advantage					
Experience Level	**Task 1**	**Task 2**	**Task 3**	**Task 4**	**Task 5**	**Total**
Inexperienced	28.81%	30.91%	25.86%	32.20%	-21.95%	21.69%
Experienced	28.57%	21.88%	22.73%	19.23%	14.29%	21.32%
Very Experienced	11.54%	31.25%	37.93%	12.50%	-44.44%	14.60%

# Clicks	Opportunity Pipeline Visibility - % TopOPPS Advantage					
Experience Level	**Task 6**	**Task 7**	**Task 8**	**Task 9**	**Task 10**	**Total**
Inexperienced	58.33%	61.54%	12.90%	2.27%	41.46%	34.82%
Experienced	55.17%	72.41%	58.82%	-17.65%	56.52%	50.76%
Very Experienced	80.65%	62.50%	42.50%	53.85%	82.35%	64.93%

# Clicks	Rep Performance Reporting - % TopOPPS Advantage					
Experience Level	**Task 11**	**Task 12**	**Task 13**	**Task 14**	**Task 15**	**Total**
Inexperienced	4.55%	12.24%	-6.38%	12.75%	-5.00%	5.59%
Experienced	5.56%	14.71%	29.17%	6.67%	17.65%	12.77%
Very Experienced	-4.17%	47.83%	14.29%	-35.71%	-26.32%	-4.26%

The results for click efficiency closely follow the results for time efficiency. Similar to above, TopOPPS performed excellent in the Opportunity Pipeline Visibility category, did well with Updating Opportunities, and showed room for possible improvement in Rep Performance Reporting.

- Users again performed poorly on Task 5 ("Update a custom field for a specific opportunity") in TopOPPS compared to Salesforce.
  - o   Rather than issues with TopOPPS this is at least partially due to what users believed to be unclear wording of the task
- Very Experienced users had a much easier time navigating the Opportunity Pipeline Visibility tasks than in Salesforce (65% fewer clicks)
  - o   Our observations show that this can at least partly be attributable to the fact that TopOPPS shows important visibility data on the home screen, whereas for Salesforce users hunt and peck until they find the reports link at the bottom.

- As with time efficiency, users also had to click and search around quite a bit before they found reports they could use for analyzing Rep Performance.

As noted above, users commented that the presentation of the rep performance graphs was confusing, although some commented that they liked it more after they performed a few tasks.

C   Qualitative results

i.   Opportunity specific updates

In terms of qualitative findings, our results showed that test subjects with sales roles enjoyed the process of updating opportunities in TopOPPS. The average of all of the sales users responses was very near the high end of favorability implying users found TopOPPS intuitive and frustration-free when it came to updating opportunities. In addition, when asked, respondents chose these top five words to describe TopOPPS: **easy to use, familiar, intuitive, effective, straightforward**.

The subjects were also asked:

Q1: How would you rate the process of updating an opportunity in TopOPPS?
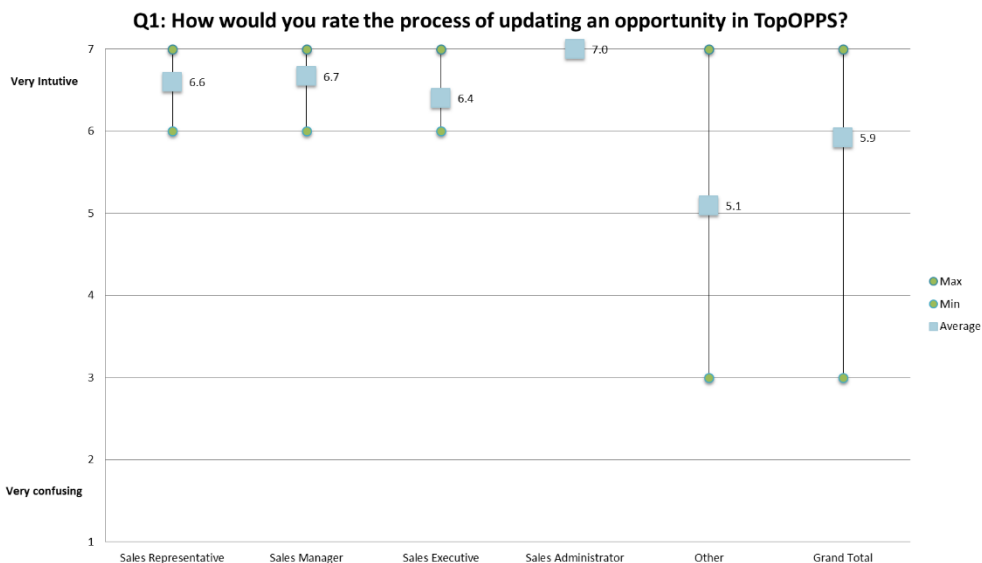
Users also responded favorably when asked to compare the frequency at which they would use TopOPPS over Salesforce for updating opportunities:

Q2: How frequently would update opportunities in TopOPPS compared to Salesforce?
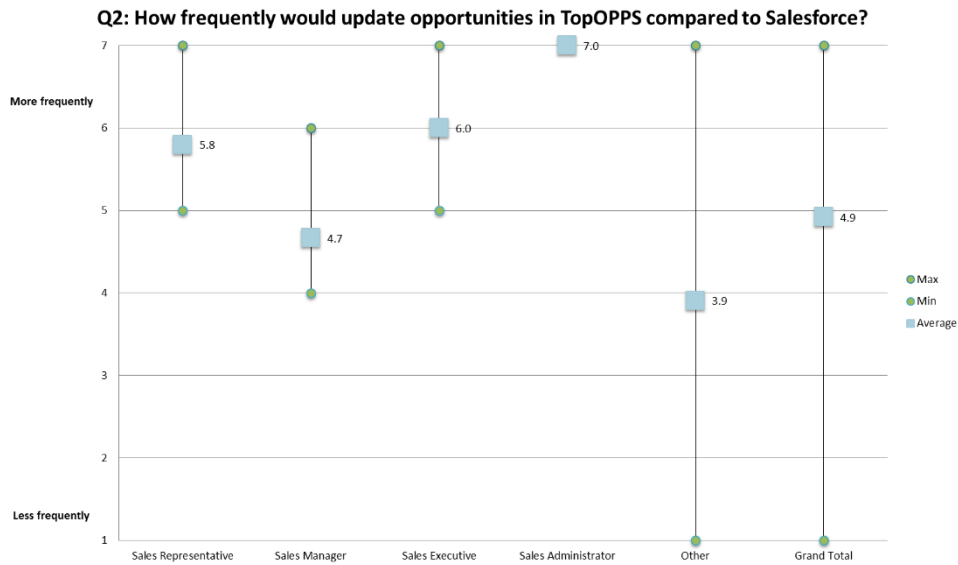
iii.   Opportunity pipeline visibility

The overall likeability of pipeline visibility in TopOPPS was high for both Sales Managers and Sales Executives. However, users generally rated Updating Opportunities higher than opportunity pipeline visibility. The top five words that users chose to describe pipeline visibility in TopOPPS were: **useful, clean, clear, organized, and timesaving.**

Q3: How would you rate the process of generating reports about the pipeline in TopOPPS?
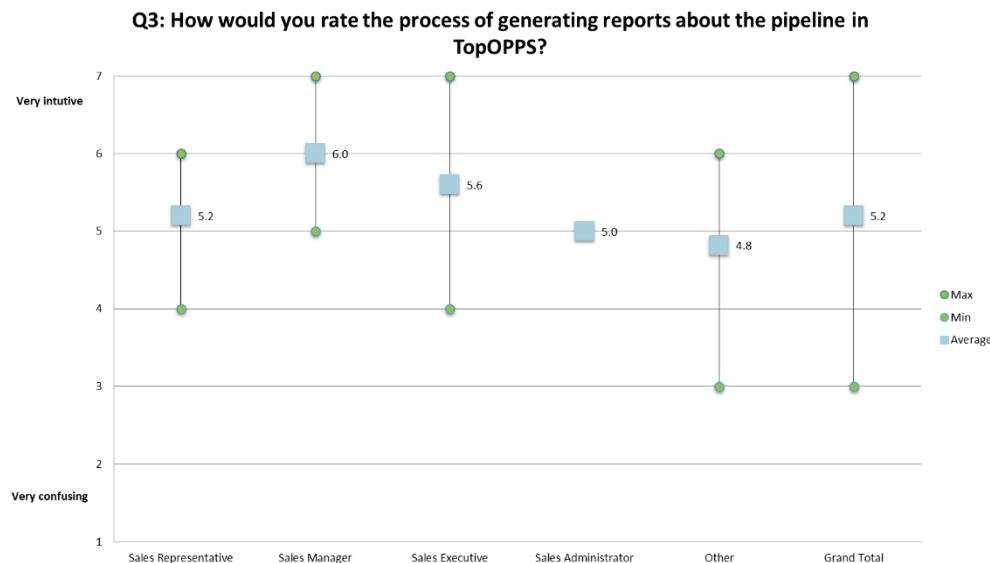
There was a higher variance in the rating of Sales Executives for pipeline reports generation. On an average, Sales Managers, and Sales Executives found the tasks of generating reports more intuitive in TopOPPS than in Salesforce.

**Q4: How visible is the opportunity pipeline in TopOPPS compared to Salesforce?**
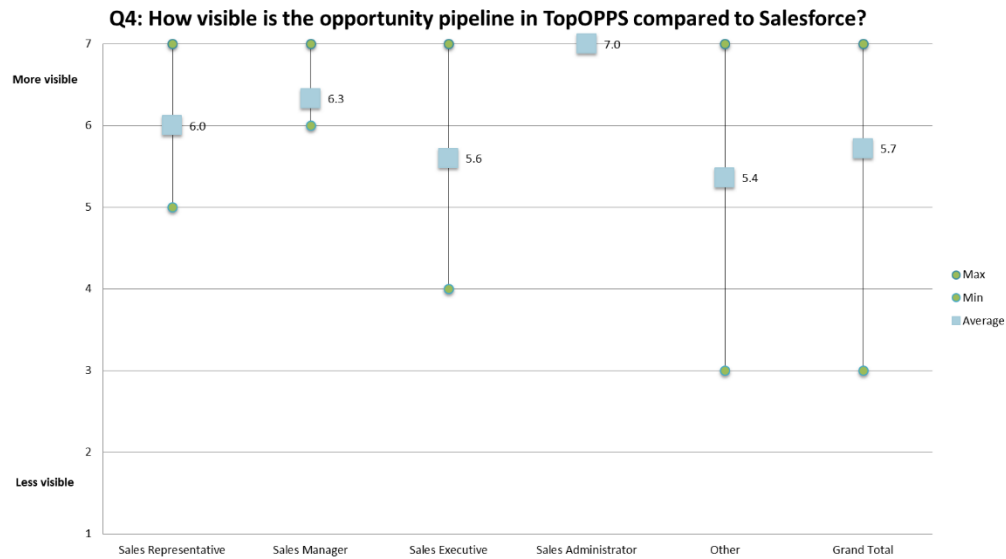
On average Sales Representatives and Sales Administrators found opportunity pipeline to be more visible than others. However, for Sales Executives, there was higher variance and a slightly below average rating.

iii.   Rep performance reporting

Sales rep performance reporting tasks in TopOPPS were the most challenging of the three task categories for the users. The users were often stuck trying to navigate between different screens. A few users failed these tasks. We believe these tasks provide the most opportunity for TopOPPS both in terms of training and in simplifying the navigation. Indicating user's experience, the top five words were: confusing, time-consuming, complex, difficult, busy. The subjects were also asked:

Q5: How would you rate the process of identifying a rep's performance in TopOPPS?
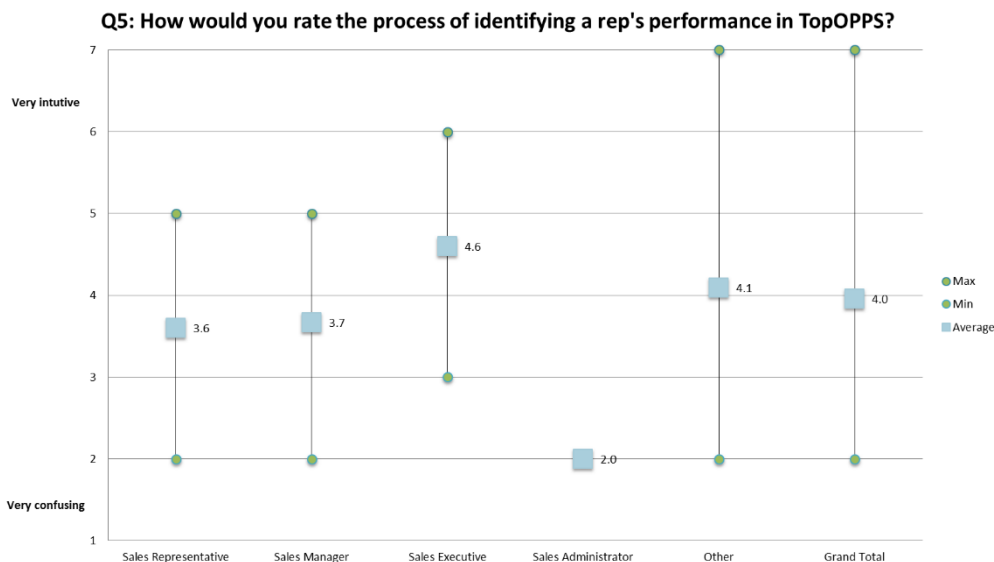
All of the sales people found the task of identifying a rep's performance in TopOPPS difficult. Everyone except for Sales Executives rated this task below average. Finally the subjects were asked:

Q6: How frequently would you track rep performance in TopOPPS compared to Salesforce?
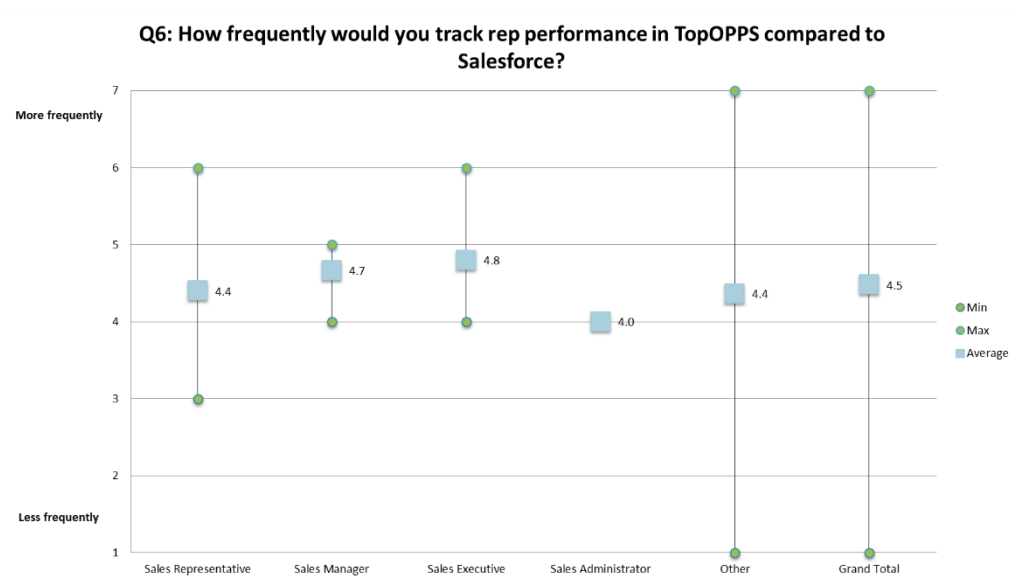
Again, this shows a low overall rating for rep performance reporting in TopOPPS which suggests room for improvement in both training and navigation.

IV.   General Feedback

In addition to the above questions, we surveyed the users on their overall perception of the TopOPPS opportunity pipeline tool:

Q7: If TopOPPS were available today, how likely would you be to use it?
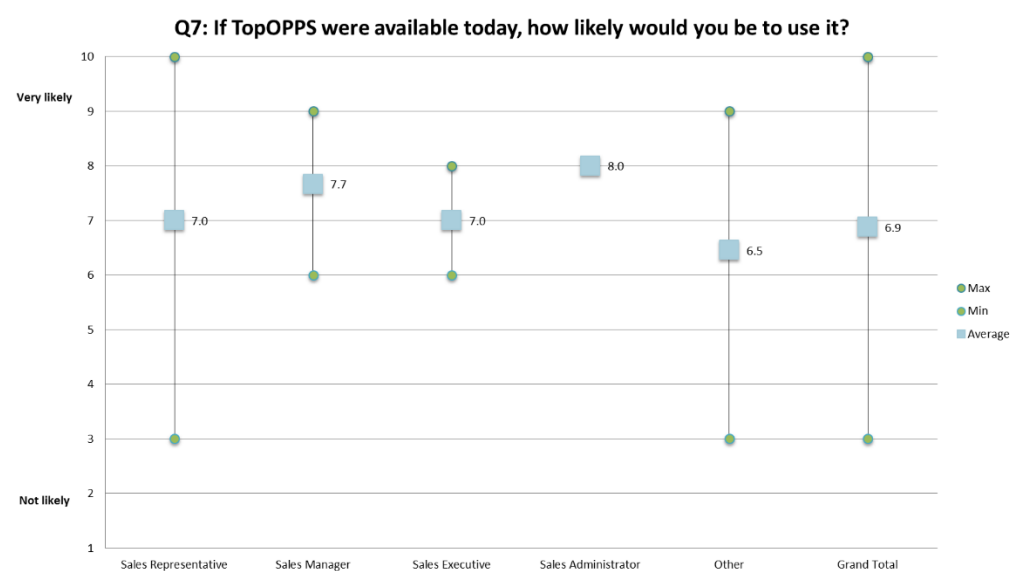
These overall questions results were quite positive for TopOPPS and showed that despite some difficulties in performing the tasks, every category of test subjects found some value in TopOPPS.

When subjects were asked what they liked most about TopOPPS, the most common answer was the clear, organized interface which they found simple to read and navigate. Subjects also enjoyed the appealing graphics and overall view of the sales pipeline.

When asked what they liked the least, subjects commented on being frustrated with the pipeline's scrolling features from left to right. It was not immediately clear to many subjects how they should navigate the TopOPPS homepage to view the different stages of the pipeline. The most common critique was the frustration involved with trying to create reports with "sales representative" on one of the axes. Finding the information required in Part III was by far the most difficult for the subjects, especially when attempting to view the quotas of sales representatives. Subjects commented that having an easier way to quickly scan across sales rep performance data, even if it had more numbers and fewer graphics, would be preferable.

VII   CONCLUSIONS AND RECOMMENDATIONS

A   Determine Statistical Advantages and Disadvantages of TopOPPS

The quantitative results clearly showed that TopOPPS is quicker, simpler and more intuitive to use when it comes to updating opportunities and the visibility of the pipeline. The only disadvantage was found amongst experienced salesforce users attempting to track rep performance.

B   Identify Strengths and Weaknesses of TopOPPS User Interface

The TopOPPS User Interface is particularly strong when it comes to quickly seeking out opportunity information and updating it. Our qualitative feedback highlighted that the key advantage this provides TopOPPS users is that they are more likely to update information in the system and will therefore have more robust data sets to monitor their opportunities. The TopOPPS user interface performed even better when it came to measuring the visibility of pipeline opportunities relative to salesforce. In particular users across a spectrum of sales experience thought that generating reports in TopOPPS was intuitive.

However when it came to monitoring rep performance we expected TopOPPS to perform much better than it did. Although the results were positive overall we did find some users experience difficulties in performing certain tasks such as finding the total value of deals in the pipeline, analyzing rep performance in a forecast period and comparing reps against their colleagues. With these in mind we make the following specific user interface recommendations:
1. Make the total value of deals in the pipeline more readily identifiable in the top right corner of the opportunities by stage page.
2. Make the total number of deals easily identified in the top left corner
3. Improve the navigation from left to right and up and down in the opportunity pipeline
4. Include a separate functionality along with opportunities and reporting in the left menu tab as a central location for rep performance reporting.
5. Center the bubble charts along the axis in reports to make identifying the number of opportunities easier

C   Develop Definitive Statements of Quality for TopOPPS over Competition

When it comes to updating opportunities in Salesforce, TopOPPS performs:
- On average 31% quicker overall
- On average 19% more efficient overall
- And reps will update opportunities 30% more frequently

When it comes to the visibility of the opportunity pipeline in Salesforce, TopOPPS performs:
- On average 47% quicker overall
- On average 51% more efficient overall
- And users though that the pipeline was 57% more visible

When it comes to the reporting on sales reps performance in Salesforce, TopOPPS perfoms:
- On average 6% quicker overall
- On average 6% more efficient overall
- And users would track rep performance 17% more frequently

IX   APPENDICES

A   Survey run sheet

SURVEY RUN SHEET

Moderator:	[Insert Name]
Date:	[Insert Date]
Location:	[In-person or External]

ORIENTATION

- **Introductions -** I am a student from Washington University who is performing this survey on behalf of TopOPPS as part of an experiential learning course. The product we are testing today is TopOPPS, a plug-in for Salesforce that drives deals through the pipeline quicker by increasing the visibility of your opportunities.
- **Independence -** I do not work for TopOPPS and did not have any input into the design of the product so please do not hesitate to give open and candid feedback in the survey today.
- **Confidentiality -** Your participation today is anonymous. We will not record any information about you other than the information you choose to record in the background questionnaire. The CELect team and TopOPPS will keep all of your responses confidential including the content of all discussions.
- **Purpose -** The results of these surveys will be used for the purposes of product development and marketing. As such we are testing the usability of the product and are not testing your personal capabilities.
- **Introduction to TopOPPS:**
    - Give the participant two minutes to play around and get familiar with the software
    - Ask the participant for their first impressions and first attitudes of TopOPPS. Is it visually appealing? Is there anything that stands out that they like or don't like about the interface? Record answer
    - Provide the following application tour:
        - Show them the main menu to the left split into opportunities, reports and settings for customization
        - Describe when an opportunity qualifies to enter the sales pipeline and the various stages the opportunity moves through until it is either won or lost. Describe how TopOPPS uses the stage and other information to place the opportunity into a certain probability band for the forecast.
        - Note that you can get more information about an individual opportunity by clicking on it
        - Note that you can filter what information is presented about the opportunities by using the filter tab to the right
        - Introduce them to the types of reports that can be generated

COMMENCE TEST
(A)   Background

- **Background questions -** Ask participant to fill out the background questions in the qualitative survey.
- **Logistics -** Note this test should take approximately 45 minutes to complete. There are three sections to the test. Each section contains 5 tasks for you to complete in Salesforce, and then in TopOPPS. We will record the number of clicks and time it takes for you to complete each of the tasks. At the end of each section there are a few qualitative questions we will ask you to fill out. There will be opportunity at the end for some open-ended dialogue on the product.
- **Questions during the survey -** Note that the participant can ask questions at any time. If the subject is confused, avoid giving any direct cues on how to complete task. Rather explain the nature of the task and what information the subject is looking for.

(B)   Opportunity Specific Updates

☐   Ask participant to complete section (B) tasks in Salesforce then the same tasks in TopOPPS.

☐   Record the time and number of clicks it takes to complete each task. Do not reset to home during the section. Count each click on a button, click to open a field, and click to save the field. Do not count a double-click or miss-click. If result is not correct or not completed within two minutes mark as FAIL.

☐   Ask participant to complete section (B) qualitative questions.

(C)   Opportunity Pipeline Visibility

☐   Ask participant to complete section (C) tasks in Salesforce then the same tasks in TopOPPS.

☐   Record the time and number of clicks it takes to complete each task. Do not reset to home during the section. Count each click on a button, click to open a field, and click to save the field. Do not count a double-click or miss-click. If result is not correct or not completed within two minutes mark as FAIL.

☐   Ask participant to complete section (C) qualitative questions.

(D)   Rep Performance Reporting

☐   Ask participant to complete section (D) tasks in Salesforce then the same tasks in TopOPPS.

☐   Record the time and number of clicks it takes to complete each task. Do not reset to home during the section. Count each click on a button, click to open a field, and click to save the field. Do not count a double-click or miss-click. If result is not correct or not completed within two minutes mark as FAIL.

☐   Ask participant to complete section (D) qualitative questions.

(E)   General Feedback

☐   Ask participant to complete section (E) qualitative questions.

☐   Ask participant what they thought of TopOPPS after the test and give opportunity for open feedback. Record their answers.

DEBRIEF

☐   Thank participant for taking part in Survey. Tell them how important their feedback is to the application's development

☐   If participant is NOT previously known to you, give them an Amazon gift card

☐   If participant is an executive note that we can offer the company a free trial version of the product for 30 days

B   Number of Clicks

Experience Level	Task 1 S	Task 1 T	Task 2 S	Task 2 T	Task 3 S	Task 3 T	Task 4 S	Task 4 T	Task 5 S	Task 5 T	Total S	Total T
Inexperienced	4.9	3.5	4.6	3.2	4.8	3.6	4.9	3.3	3.4	4.2	22.7	17.8
Experienced	4.7	3.3	5.3	4.2	3.7	2.8	4.3	3.5	4.7	4.0	22.7	17.8
Very Experienced	4.3	3.8	5.3	3.7	4.8	3.0	5.3	4.7	3.0	4.3	22.8	19.5

Experience Level	Task 6 S	Task 6 T	Task 7 S	Task 7 T	Task 8 S	Task 8 T	Task 9 S	Task 9 T	Task 10 S	Task 10 T	Total S	Total T
Inexperienced	4.0	1.7	4.3	1.7	5.2	4.5	3.7	3.6	3.4	2.0	20.6	13.4
Experienced	4.8	2.2	4.8	1.3	5.7	2.3	2.8	3.3	3.8	1.7	22.0	10.8
Very Experienced	5.2	1.0	2.7	1.0	6.7	3.8	2.2	1.0	5.7	1.0	22.3	7.8

Experience Level	Task 11 S	Task 11 T	Task 12 S	Task 12 T	Task 13 S	Task 13 T	Task 14 S	Task 14 T	Task 15 S	Task 15 T	Total S	Total T
Inexperienced	5.5	5.3	4.1	3.6	3.9	4.2	8.5	7.4	3.3	3.5	25.3	23.9
Experienced	6.0	5.7	5.7	4.8	4.0	2.8	10.0	9.3	5.7	4.7	31.3	27.3
Very Experienced	4.0	4.2	3.8	2.0	4.7	4.0	4.7	6.3	6.3	8.0	23.5	24.5

C   Amount of Time

Time in Seconds

Experience Level	Task 1 S	Task 1 T	Task 2 S	Task 2 T	Task 3 S	Task 3 T	Task 4 S	Task 4 T	Task 5 S	Task 5 T	Total S	Total T
Inexperienced	40.9	28.6	30.5	16.5	33.8	18.9	46.4	27.8	43.3	28.4	194.8	120.3
Experienced	36.3	23.3	23.1	27.4	16.7	10.4	41.1	19.4	23.6	32.3	140.9	112.9
Very Experienced	23.0	21.5	28.3	15.8	24.5	12.3	29.8	23.0	22.5	12.2	128.2	84.8

Experience Level	Task 6 S	Task 6 T	Task 7 S	Task 7 T	Task 8 S	Task 8 T	Task 9 S	Task 9 T	Task 10 S	Task 10 T	Total S	Total T
Inexperienced	52.6	17.2	48.8	10.6	73.0	53.3	46.8	53.8	47.6	21.6	268.9	156.5
Experienced	43.6	14.9	33.0	6.7	42.9	25.0	11.6	31.7	51.1	11.3	182.1	89.6
Very Experienced	36.7	9.7	15.2	9.8	23.2	25.0	14.0	10.2	41.0	9.3	130.0	64.0

Experience Level	Task 11 S	Task 11 T	Task 12 S	Task 12 T	Task 13 S	Task 13 T	Task 14 S	Task 14 T	Task 15 S	Task 15 T	Total S	Total T
Inexperienced	75.9	68.6	50.3	47.5	46.4	54.5	111.8	97.3	42.8	55.7	327.2	323.6
Experienced	79.9	54.1	44.7	57.6	27.1	22.0	111.1	95.7	74.7	46.4	337.6	275.9
Very Experienced	29.2	29.2	32.5	25.7	27.7	34.5	57.7	65.5	60.5	68.2	207.5	223.0

D. Quantitative Survey Questions/Tasks

- ☐ <u>Opportunity Updates</u>
  - ◘ Update opportunity amount to $500,000
  - ◘ Move close date to 10/02/2014
  - ◘ Advance an opportunity to the next stage
  - ◘ Add a task to the opportunity
  - ◘ Update a custom field for a specific opportunity
- ☐ <u>Opportunity Pipeline Visibility</u>
  - ◘ How many deals do we have in the pipeline?
  - ◘ How many deals can we commit to the forecast?
  - ◘ How many deals do we have that are worth more than $600,000?
  - ◘ What is the total value of the deals in my pipeline?
  - ◘ What type of opportunities do we have the most of in our pipeline?
- ☐ <u>Sales Rep Performance Reporting</u>
  - ◘ Which rep has the most deals committed to the forecast?
  - ◘ Which rep has the most revenue committed?
  - ◘ Which rep has closed the most opportunities this quarter?
  - ◘ Which rep(s) is in danger of not reaching their quota by the end of the quarter?
  - ◘ How many reps have deals expected to close this quarter?