**Design Scope for Cogent Mobile vCRM iPhone Application**

**App Function:** Cogent vCRM is a virtual private assistant for mobile CRM (customer relationship management software). Using their smartphone and simple (voice and/or touch) commands, the user will be able to directly update and access their corporate CRM while on-the-go. The application will have multi-modal input (voice and touch) as well as multi-modal output (voice and visual).

**Target User:** The target user is the **field sales professional**. These individuals work across a variety of industries (such as software, pharmaceuticals, business services, chemicals, etc.). They are **constantly on-the-go** from customer to customer and meeting to meeting; most typically they are **driving** by themselves in their car. They also spend a good portion of their time onsite at a client’s office, in the airport, on a train, and in taxi cabs. To effectively perform their job they need **timely access to their corporate CRM**; both to **update** account records as well as to **pull discrete** pieces of information. Their CRM use behavior (including frequency and level of detail) is often dictated by sales management not personal incentive.

The target user ranges in age from **mid 20s to over 50** and are almost equally likely to be **male or female**. They are all comfortable with their **smartphone as a communication device**, but they vary greatly when it comes to comfort level of their smartphone as a computing device. They value **ease of use, clear benefits/results and consistent performance**. They are not your typical “early adopters” and thus do not place a high value on novel technologies.

**App Purpose:** Cogent vCRM will cut down the time it takes to enter and retrieve CRM system data and also allow users to access it whenever, wherever; leading to increased frequency of use and compliance and thus more accurate and complete customer records. For field sales professionals this will result in increased productivity and improved data relevance. For sales management this will lead to higher data integrity, real-time business metrics, and overall improved pipeline management.

**Design Principles:** In order to be as beneficial to the target user, the application must:

* Be easy and intuitive to use 🡪 logical navigation and flow
* Require limited user training 🡪 familiar and intuitive commands
* Exhibit high impact actions 🡪 direct access to requested data (limited click path)
* Maintain high quality data performance 🡪 processing speeds and accuracy
* Provide a clear benefit 🡪 a new kind of data transparency for sales professionals

**Development Objectives:**

* Beta launch in Aug 2011 supporting iOS and Salesforce.com with basic functionality [TBD]
* v1.0 launch to support multiple devices (smartphone and tablet) and incorporate expanded functionality
* v2.0 launch to expand to multiple CRM platforms (including MS Dynamics, Oracle/Siebel, SAP/Sybase) and include additional installed services (e.g., LinkedIn, OpenTable, others)

**Project Scope:** Develop a multi-modal (voice and touch) CRM app that allows users to:

* Access value-add CRM services including: meeting map and turn-by-turn directions; meeting “cheat sheet” summary (Cogent Notes™); guided CRM system update (Cogent Prompt™)
* Perform basic communications functions including: SMS, email and voice
* CRUD [create, read/review, update, delete] a number of CRM elements including: Accounts/Leads; Contacts; Opportunities; Notes; Events; and Tasks
* Incorporate on-device registration process and settings management
* Incorporate on-device tutorial
* [Note: number of functions for Beta vs. v1.0 needs to be determined]

**Design & UI/UX Services**:

Evaluate proposed native iOS app design based on the following criteria. Final design is to be mutually approved based on Keynote prototype.

* Branding, UI theme/design
* Settings/preferences
* Voice and touch input and search
* Voice and visual output
* Identify content transitional and conversational areas; paradigms need to be identified and verified
* Gracefully pause/continue action if other actions occur (i.e., a call comes in)
* Background task completion Produce library of sounds to support voice control interactions

**Development Services**:

* Build iOS app to works on iPhone and iPad [with flexibility to build out future OSs]
* Use third party Speech Recognition Engine solution [information to be provided]
* Define an API between Cogent server and client applications to:
* Submit voice files and touch inputs
* Receive CRM data and server responses
* QA application prior to delivery

**Design Assumptions:**

* iPhone UI supports just one orientation, while iPad UI supports portrait and landscape orientation
* Offline mode with subset of features
* Additional UI controls for iPad (Popovers, Splitview)
* Animated transitions
* No integration of iAds or similar

Chatter Feed

Meeting /Account Map

Turn-by-turn Directions

Cogent Prompt™

CogentNotes™

SMS

Voicemail to Text

**Communications Use Cases**

Account

**CRM CRUD Use Cases**

Standard Cogent Interaction Dialogue Box and Multimodal Input/Output

**Optional Settings:** Cogent Services, Manage Access, Location, [Payment Info]

*Convert*

**CRM Cogent Use Cases**

Calendar

Tasks

Contacts

Notes

Lead

Calendar

Tasks

Opportunities

Notes

Contacts

Tutorial - - CRM [Salesforce.com]

- [LinkedIn]

- [Others]

Dashboard

- CRM [Salesforce.com]

- [LinkedIn]

- [Others]

Login

Registration

*On first use tutorial runs automatically*

**New User**

Share

Feedback

**Required Settings:** Profile, Preferences, Installed Services *(Runs with Wizard)*

**Existing User with Profile**

**Existing User with *Incomplete* Profile**

Settings

Welcome