

Facts

Factual information about the target client



Equipment & Environment

- DM100 postage meter. Located on a countertop nearby to Yolanda's desk. Public location but tucked out of the way. Countertop is shoulder-height.
- Small office space - ~5 people in the "office" even though the company is larger
- Personal smartphone, but does not use for business at all

Responsibilities

- Manages office activities, supervises another worker
- Influencer of next equipment purchase
- Orders supplies
- Initiates charge back of costs for some items
- Primary meter operator (5% of her time "sending")

Attitudes

- Office staff see Yolanda as the "expert" around shipping & mailing, which she greatly enjoys, although her knowledge is not great.
- Great relationship with UPS as they do a lot of freight so they have a negotiated rate, even though they are only doing <30 small parcels per day

Pain & Needs

Client problems that we believe our solution solves

Mailing

- Difficult to read display due to meter location on high countertop.. Also can be hard to reach up and put items on the meter scale.

Shipping

- Complexity of shipping gives Yolanda a queasy feeling that she is spending more on shipping than she should, but she doesn't know how to assess the situation and determine if it's true. She feels helpless to improve the situation. Vaguely feels that she could be saving the company some money but isn't sure how to do it.
- Not a "shipping expert" so its hard to keep track of the different rules for different carriers (wrong class, not enough postage, or overpaying). She doesn't want to compare shipping prices on an item-by-item basis (there are usually other factors that drive her decision) but she would like the ability to periodically assess whether her current processes and carrier rules-of-thumb could be improved.
- Unpredictability and heterogeneity of items results in Yolanda keeping many box sizes on hand. Storing multiple box sizes is a problem. She wants to limit the amount of different packages she uses.
- Carrier pickup time drives cadence and behavior – gotta get it to the dropbox before 4pm
- Painful to search multiple carrier histories to find tracking numbers (*I can't remember how I sent it*)
- Current meter 5-lb scale does not accommodate some heavier items they have to send – resort to estimating weight or sometimes running to another office in the same industrial park to borrow their higher-capacity scale

Overall:

- Accessing, managing, and delivering data to Accountant every month (plus off-cycle requests) is a manual, time-consuming, error-prone process.
- Multitasking & pressured: Sending is just one part of her job among other responsibilities. Would value anything that makes her process shorter and simpler.
- When there is a problem, it's hard to track who sent what, using what carrier, and when

Behavior

Existing behavior now because they don't have our solution

Mailing

- *Where:* Postage meter in central location
- *Who:* Yolanda (centralized)
- *Volume:* 0-5 mail pieces per day. Occasionally needs to do larger mailings (up to 100) with catalogs, samples to the sales team or during the holidays
- *Contents:* Transactional & promotional
- *Services used:* Sometimes offers postal tracking to customers, but not sales office, it is not an efficient process.
- Occasionally bills customers for shipments, but only if very expensive
- *Cadence:* Create mail throughout the day; run through meter once before USPS comes for pickup

Shipping

- *Where:* Yolanda's desk (UPS.com, FedEx.com)
- *Who:* Yolanda and other office staff (distributed)
- *Volume:* up to 25 items a day
- *Contents:* Order fulfillment as a business process - Mainly parts and samples. Tend to be small but sometimes large (too large for scale)
- *Services used:* 2-3 day or 3+ day services. Urgency not a factor. Special services rarely used.
- *Cadence:* Print shipping labels as the need arises. Take items to drop-box before pickup time.

Overall

- *Criticality of items:* Not critical. Items are by-products of doing business but not business-critical.
- *Destination of items:* Domestic, occasionally international
- *Who pays for shipping:* Company. Postage/shipping is not charged back to recipient. It is treated as cost of doing business.
- *Perception of packaging:* Appearance of packaging not particularly important (meh)
- *Decision-making:*
 - Rule of thumb: mail and small packages go USPS, larger go UPS or FedEx, based on cheaper rate. Yolanda decides which carrier & how to send.
 - For international packages, always lets FedEx handle it – experience tells her it will be faster and more trustworthy
- *Package prep & Addresses:* Sometimes addresses her own items, sometimes receives items from coworkers already addressed. Addresses are usually different for each item.

Goals

Goals implied by their behavior that this solution will better support

- Easier way to compare pricing/time of delivery/comparable services between carriers
- Box sizes visualized (illustration of items that can fit there) suggests similar box sizes options
- Ability to recall commonly/recently used boxes
- One address repository for all carriers. Easy way to get addresses from other systems (import/direct connection)
- Confidence that shipment will be delivered on time, not over/under pay. and helps her figure out best option to ship – not on an item-by-item basis, but overall
- Would like to give Accounting a better idea of what it is costing them to provide spare parts, samples, etc
- Would benefit from email notifications
- Grouping in the address book is important to her as she sends to the same group of people