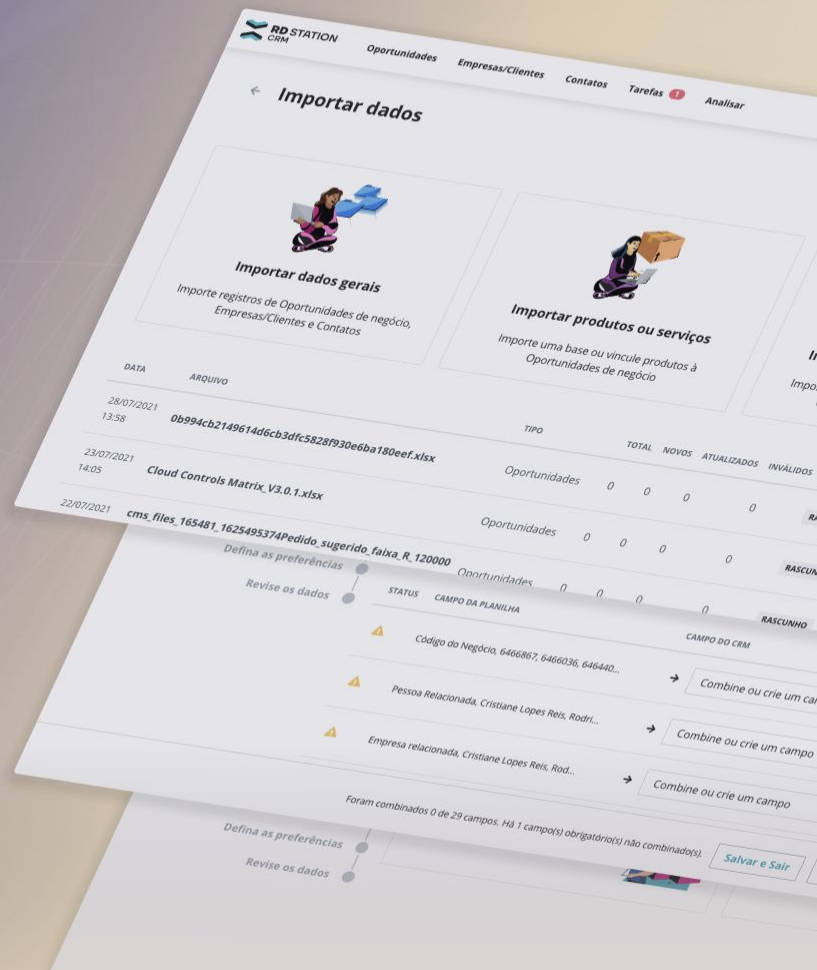


Product Design Case

Data import

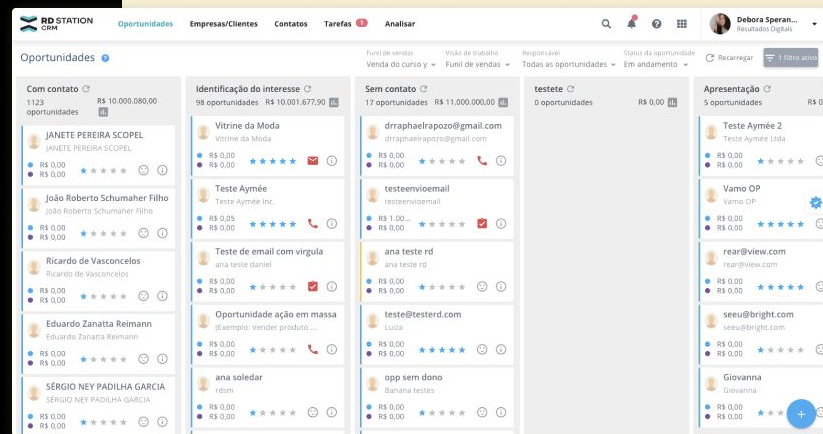
Debora sperandio



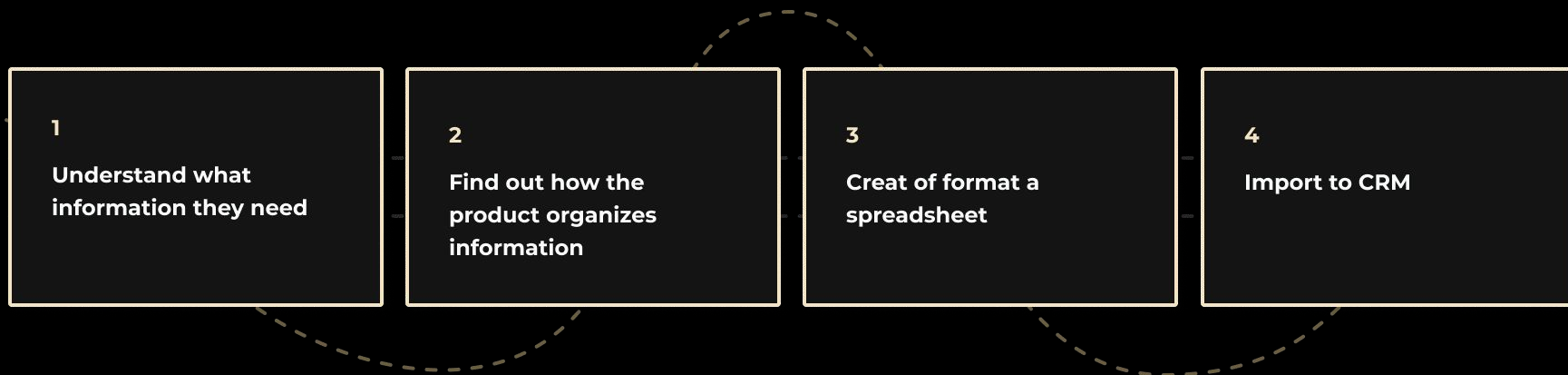
People use a CRM to organize their sales process and centralize their data in one place so they can sell more.

They work with a wallet in a sales funnel, negotiating with business opportunities.

One way people can bring data to the product is through the data import.



There are several steps they have to do even before starting the process.





Top 3 on support

Import was always in the top 3 most frequently asked questions on support.

"It's hard to find where I need to go to import."

"How can I edit my spreadsheet to import?"

"What does import companies/clientes means?"

"I didn't understand how to match the fields with the ones that are in my spreadsheet"

"I have to leave the flow to create new custom fields in the product. It makes no sense."

"I duplicated everything! Do I need to delete and redo everything?"



Low completeness

Out of 100 people, only 18 completed.

Also, we found that 33% of our clients were coming from a process that only used spreadsheets. They didn't even ever had used a CRM.

So... let's improve it.

Gether all the information.

Metrics.

Benchmark.

Talking to the sales team.

Voice of Customer Report.

NPS.

Sales reports.

Onboarding qualification

Discovery

CSD.

Certainties

Today we only work with data encoded in UTF-8

In CRM there are three types of information you can import: Opportunities, Only Companies/Clients and Contacts, Products.

Wizard is in unregulated progress.

We do not import history or notes.

[RDSM Integration] If RDSM integration is active before import, opportunities can create marketing leads.

The RDSM export format is incompatible with the CRM import format, so the user cannot easily import data from one tool to the other.

Suppositions

Improving import will improve activation and retention

We don't need to define which spreadsheet it is importing (if "opportunities" or "only companies/customers and contacts")

Improving the import experience (UX/UI) will decrease the support contact rate related to it.

"A pre-import mechanism to analyze the data to be imported and avoid possible errors can improve the experience

Error warning displayed to the user before their import comes up to the system can improve import completeness and system performance.

Doubts

How long is the customer willing to wait for the import to take place?

Do customers have the necessary knowledge to make an import? Or regardless of the solution available, will it be important to introduce you to the basic concepts?

Do not map required CRM fields, does that spreadsheet row not be imported (same in RDSM integration)?

Will we be able to import history and annotations via import?

Are we going to create new features?

Can we let him select what creation date he wants the

Talking to users.

Research part was broke in 2 parts:

Quantitative

To understand use cases and jobs to be done on a larger scale.

Qualitative

Investigate pain points and understand what improvements people needed.

"It's hard to find where I need to go to import."

😞 User 1

"How can I edit my spreadsheet to import?"

😞 User 2

"What does import companies/clientes means?"

😞 User 3

"I didn't understand how to match the fields with the ones that are in my spreadsheet"

😞 User 4

"I have to leave the flow to create new custom fields in the product. It makes no sense."

😞 User 5

"I duplicated everything! Do I need to delete and redo everything?"

😞 User 6

"When I try to import I receive a message of error and I don't understand why. I did as it's said in the help center."

😞 User 7

"My spreadsheet is all set up, but when I try to import, the CRM keeps sending me a error message that I can't solve. Can you



05

Who could use and for what

The sales manager

They control the sales process and the amount of information. They spend their time between managing other people and looking for sales metrics.

Profile

Detailed, demanding and always looking for ways to improve the sales process.

Hold weekly or monthly meetings with sales people to look for bottlenecks and engage the team.

Jobs to be done

1. All sales people have access to the same information.
2. Manage and move information in large volumes.
3. Bring information from other systems into the new tool.
4. Bring information from spreadsheets into CRM.
5. Be aware of the amount of information they have centralizing everything in one place.

The main use cases we found.

Migration and testing

54%

Beginning of the journey.

Update data

32%

Through all life time.

Fill in the product

14%

Through all life time.

And we choose one.

Migration and testing

54%

Beginning of the journey.

Update data

32%

Through all life time.

Fill in the product

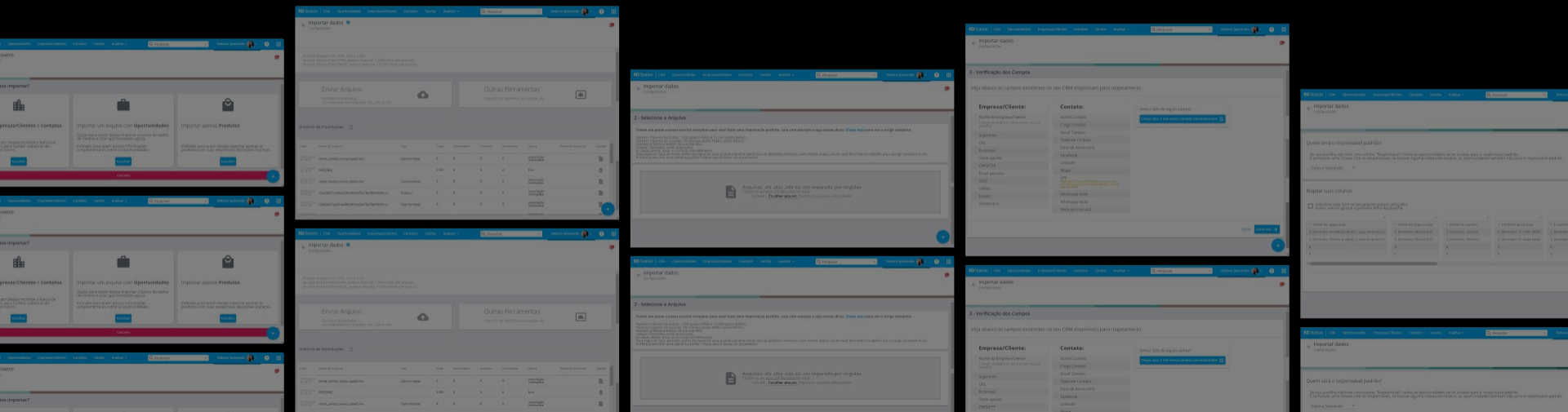
14%

Through all life time.

Going through the pain points.

I went back to the flow and compared everything that had been found in the surveys.

We found over 50 pain points in the flow.





Configurações



Seu time

[Convites, Usuários e Equipe](#)

Ajustes da sua conta

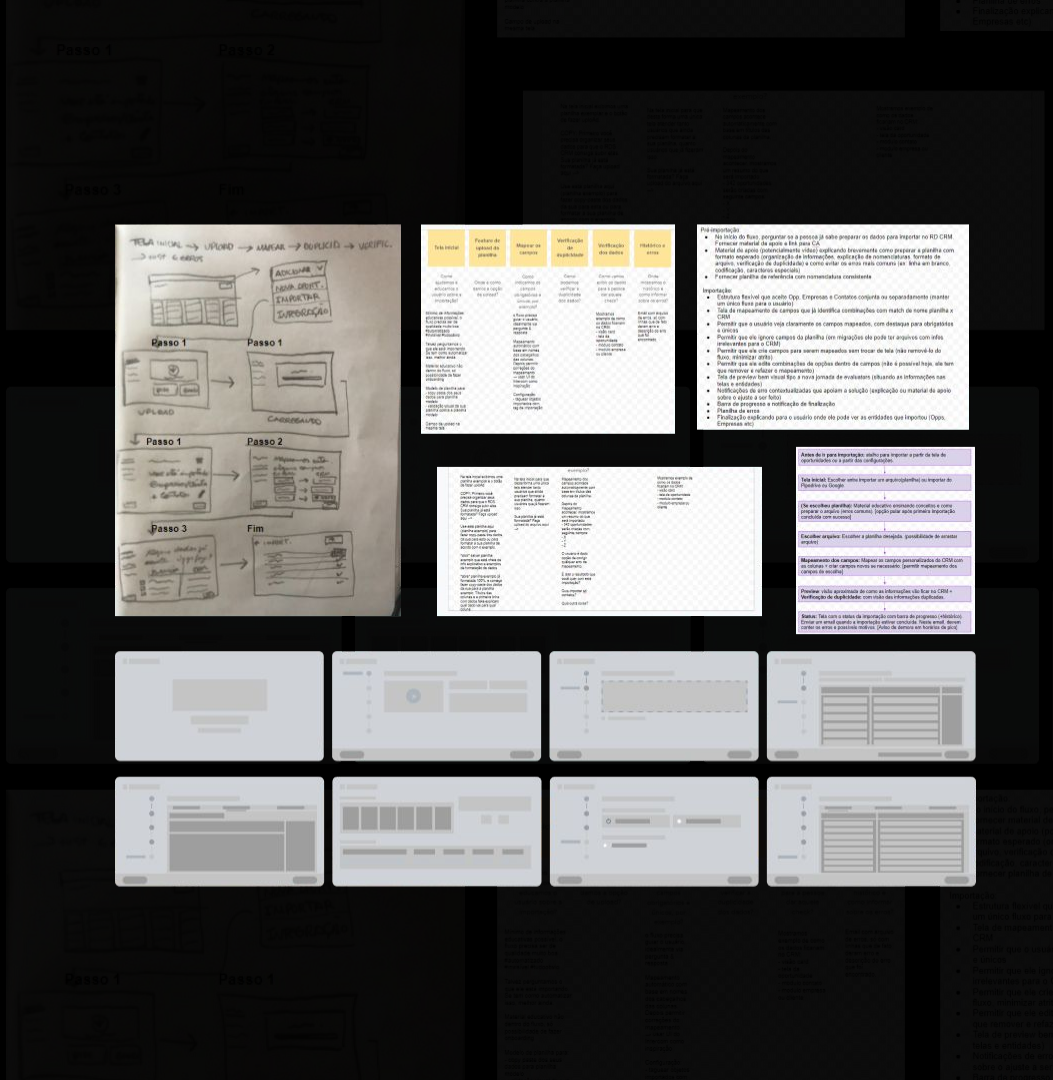
[Etapas do funil de vendas e CRM2CRM](#)[Fontes e Campanhas](#)[Produtos e Serviços](#)[Segmentos](#)[Motivos de perda](#)[Informações pré-definidas](#)[Campos personalizados](#)[Modelos de e-mail](#)[Telefone virtual](#)

Avançado

Ideation time!

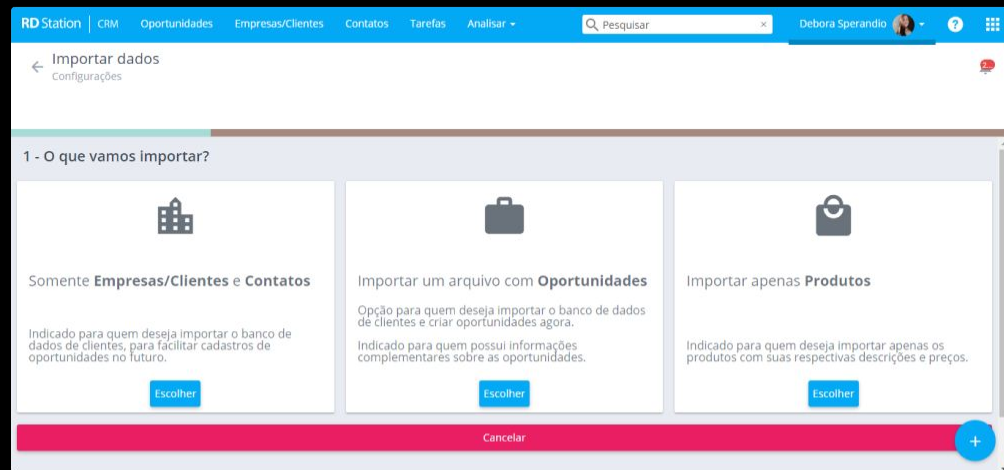
I presented the pain points to the team to co-create with them.

We drew flows and options to solve the pain points.



Tasks

Priorization.



Broke into 3 main deliveries.

1

Opportunities flow.

First wave.

2

Products flow.

Second wave.

3

Migrate flow.

Thrid wave.

11

Prototype

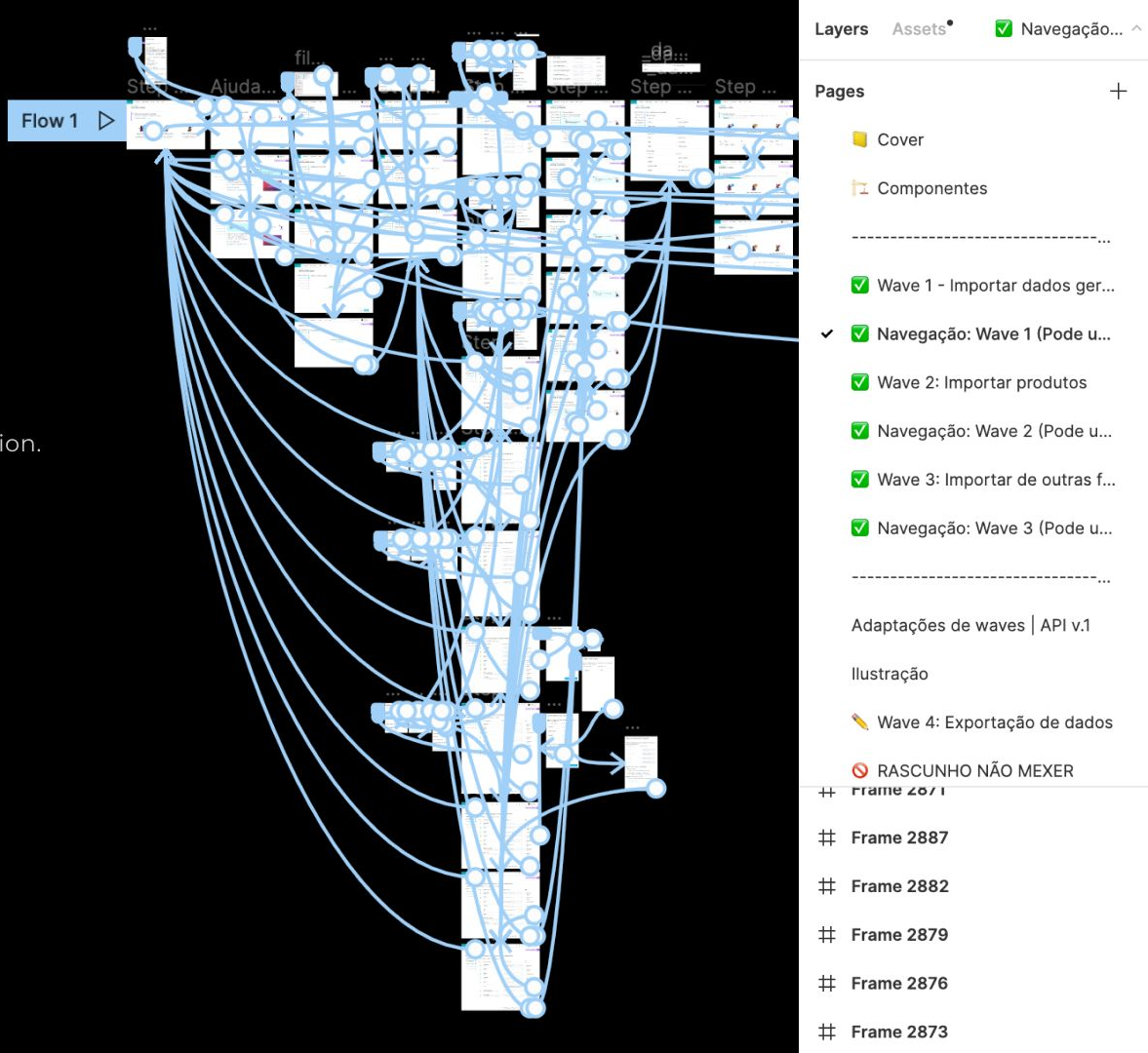
Prototype and testing.

It was time to prototype and test.

Also, revisit the business rules and discuss the solution.

>30

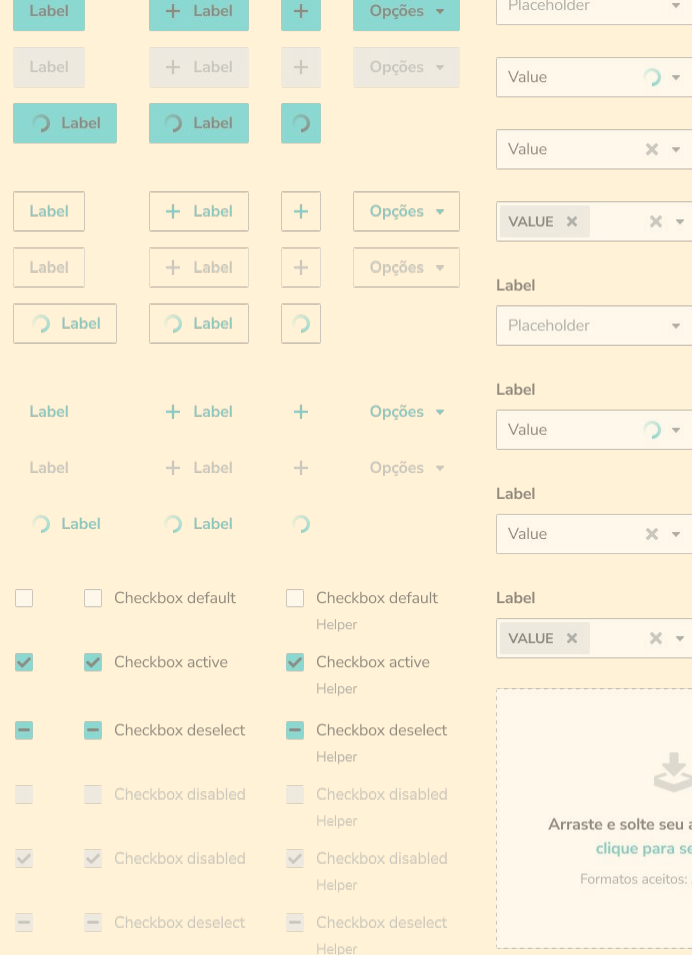
Tests on the three deliveries.



A new face

A new Design System.

After the rebrand, we develop a new design system in a new technology.





Ops... nothing is perfect.


Top down requests and needs.

We needed to review a lot of flows and business rules.

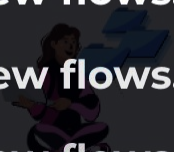
14

Importar dados

Dúvidas sobre como importar?



Solutions




Importar dados gerais

Importe registros de Oportunidades de negócio, Empresas/Clientes e Contatos




Importar produtos ou serviços

Importe uma base ou vincule produtos à Oportunidades de negócio



Importar de outras ferramentas

Importe Oportunidades, Empresas/Clientes e Contatos de outras ferramentas



DATA	ARQUIVO	TIPO	TOTAL	NOVOS	ATUALIZADOS	INVÁLIDOS	STATUS
28/07/2021 13:58	0b994cb2149614d6cb3dfc5828f930e6ba180eef.xlsx	Oportunidades	0	0	0	0	RASCUNHO  
23/07/2021	Cloud Controls Matrix_V3.0.1.xlsx	Oportunidades	0	0	0	0	RASCUNHO  
22/07/2021	com-Nley-165431-1625495374Pedido_sugerido_faixa_R_120000	Oportunidades	0	0	0	0	RASCUNHO  



← Importar dados

Dúvidas sobre como importar?



Importar dados gerais

Importe registros de Oportunidades de negócio, Empresas/Clientes e Contatos



Importar produtos ou serviços

Importe uma base ou vincule produtos à Oportunidades de negócio



Importar de outras ferramentas

Importe Oportunidades, Empresas/Clientes e Contatos de outras ferramentas



DATA	ARQUIVO	TIPO	TOTAL	NOVOS	ATUALIZADOS	INVÁLIDOS	STATUS
26/08/2021 19:47	Teste importação 2 produtos (6).xlsx	Empresas/Clientes	3	0	0	0	NA FILA
08/07/2021 16:00	Oportunidades.xlsx	Oportunidades	4	4	0	0	IMPORTADO

Launch and iteration

Launch.

Step 1

Launch to a small base of heavy users that were already using the product.

To document and validate use cases.

Step 1

Launch to every user that was already in the product.

To identify bugs in a large scale and adjust them before the big launch.

Step 3

Launch to everyone. Old and new users.

The big launch.

16



21

New screens.

With a new Design System.



47

New interactions.

Between the 3 new flows.



1.882

Commits.

For all the project.



Better completeness

Now out of 100, 39 could manage to make to the end.

A 101% upgrade.




Less visits to complete the flow


Indicates that people needed less page access to be able to complete 1 import.


With the same amount of imports been done.

To look for

Considerations

 The import feature is not on the top 3 support doubts, but... it's is still on the top 10.

 Update the design system.

 Break in smaller deliveries.

