

Summary

In this month's UX review, we will discuss the pros and cons of our current workflow from both a director and a planner's perspective. The original plan creation workflow was designed to only accommodate first time plan creations. It's a somewhat guided process with lots of steps. It is not designed for returning users who prefer efficiency. This review includes recommendations that can simplify the workflow and make it so users can easily add, edit or delete campaigns, programs, tactics, etc.

In order to improve the experience, we need to understand our users' mindsets. We will attempt to compare users' mental models with the conceptual models Gameplan provides. The goal is to make sure the two types of models match and users are given the tools and guidance they need to complete tasks in Gameplan efficiently.

Recommendations

1. Merge the Plan Edit workflow with the Inspection workflow
 - * Flyouts (editable) vs. Popups (non-editable)
 2. Remove the "Apply to Calendar" step when creating/editing a plan
 3. Make form fields editable everywhere
 4. Create a way to add campaigns/programs/tactics easily
 5. Add a simple approval/disapproval process
-

Demo: <http://invis.io/2Z1H5JKKE>

Mental Model vs Conceptual Model

Planner

Story

As a planner, I want to easily add campaigns/programs/tactics to existing plans so that I can efficiently set up my marketing activities in Gameplan.

Mental Model

A planner expects to see buttons/controls immediately near the calendar so they can add/delete/edit tactics etc. The calendar should reflect any changes made instantly.

Conceptual Model

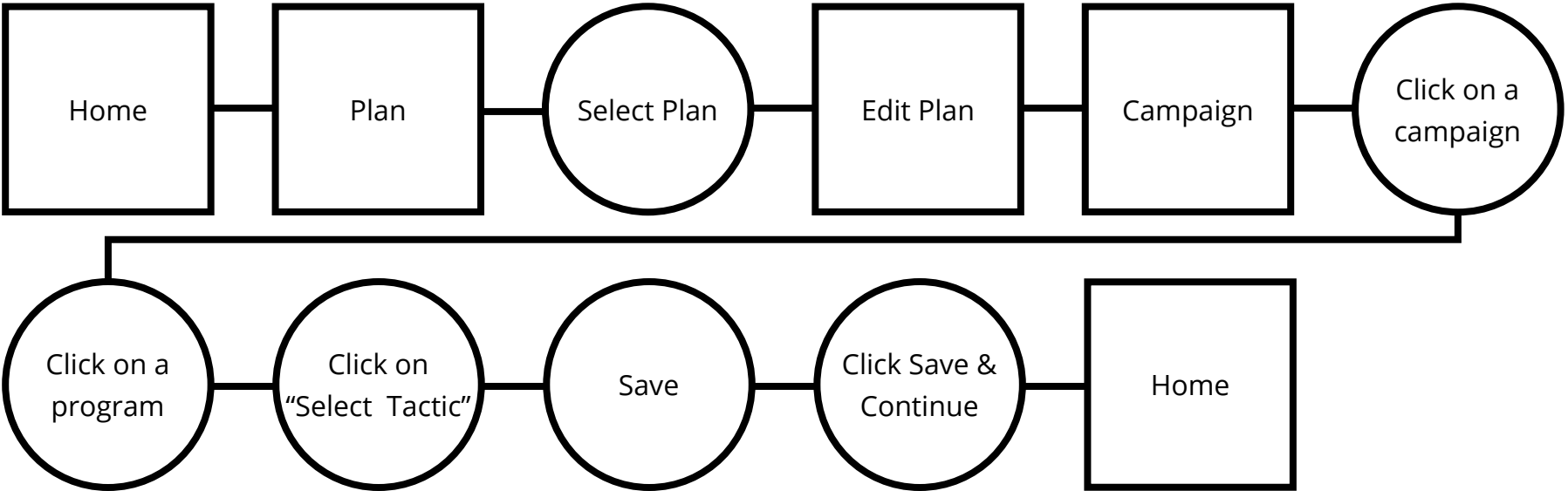
Gameplan presents a calendar that requires double-clicking in order to bring up the Inspection View which is a view-only object. If a user wants to make edits to the plan or tactic, they will have to go to the Plan tab, select the plan from a list and then use the Campaign tab there to make edits. This workflow was designed only to accommodate a new plan creation and feels very cumbersome.

Solution

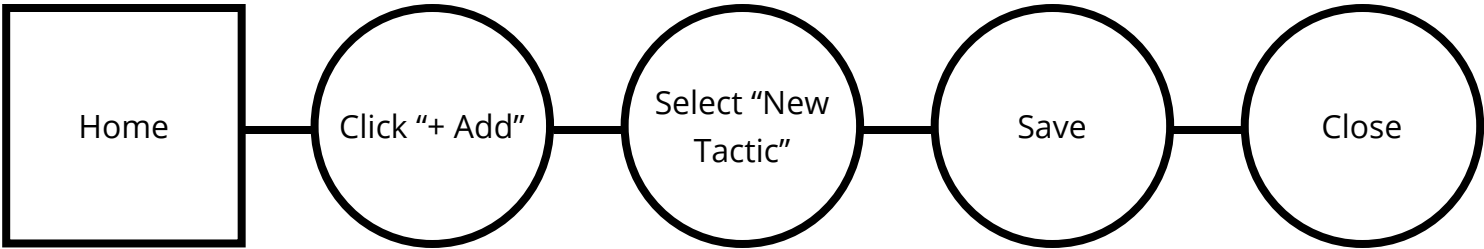
I am proposing the removal of the calendar view from the Plan Edit workflow and make the main calendar on both the Home page and Plan page editable.

1. An "+ Add" button will be added to allow users to create a new plan/campaign/program/tactic easily
2. An "Edit" button will be added to the inspection popups to allow users to make on-screen edits
3. The new Inspection workflow will be used for both Plan Edit and Plan View modes

Current Workflow



Improved Workflow



Hello, Stacy.

Let's begin by filtering the information you want to see below.

Marketing Summary

[Go to Dashboard](#)



Filters

Update Results

Business Unit

Business Unit 1

Business Unit 2

Business Unit 3

Business Unit 4

Business Unit 5

Business Unit 6

select all

deselect all

Plan

Plan A

Plan B

Plan C

Plan D

Plan E

Plan F

select all

deselect all

Geography

Vertical

Active Filters

Plan: Plan B, Plan D, Plan F | Business Unit: Business Unit 2, Business Unit 4, Business Unit 6 | Geography: All | Vertical: All | Product: All | Owner: All

Marketing Activities

+

12

New Plan

New Campaign

New Program

New Tactic

Fiscal Year: 2015 View By Plans Show Status

Task Name	2015	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Plan B													
Improvement Activities													
ERP V10 Product Launch													
Q2 Lead Gen													
Conference													
Holiday Campaign													
Retargeting Campaign													
Plan D													
Campaign A													
Campaign B													
Campaign C													
Campaign D													
Campaign E													



Campaign Name A

[Edit](#)

Summary

I'm running a campaign called **Campaign Name A** from **July 15** to **September 15**.

The status is: **In-Progress**.

Details

[Budget](#)[Review](#)[Setup](#)

Parent Plan

Cost

Owner

Description

Start Date

Deployed to Integration

End Date

TQL

Attributes

Custom Field 1

Custom Field 2

Custom Field 3

Custom Field 4

Campaign created.

[Save & Continue](#)[Cancel](#)

bulldog

Mental Model vs Conceptual Model

Director

Story

As a director, when I log in, I want to be able to tell if there are any tactics that are waiting for my approval/disapproval so that I can review all pending tactics in one seating.

Mental Model

A director expects to see a clean list of all pending tactics somewhere when they log in and make informed decisions or collaborate with his/her planners in one central location.

Conceptual Model

Gameplan presents a tab called "Requests" above the calendar which, when clicked on, shows all the Pending Tactics with no sorting ability, etc. The "Review" section in the popups is very limiting today, with small windows and buttons, which could make a frustrating collaboration experience for our users.

Solution

I am proposing that we create an obvious actionable button above the calendar with a call-out number that shows the number of pending tactics.

1. When clicked on, a popup list of pending tactics will show up for quick reference
2. If a director is interested in seeing a full list of tactics, he can do so by clicking on View All Tactics. A full list of tactics, controlled by the filters, will show up in a sortable format with helpful information such as MQL, Parent Plan, Status, etc.
3. The Tactic List view is a scalable feature for other backlog items such as Wish-list Creation and Tactic Prioritization

Current Request Link

HOME

MODEL

PLAN

BOOST

REPORT

Bulldog Solutions

Chris Parisi | VP - Technology1

Gp

Planning Review

Add Actuals

Edit Plan

Hello, Chris.

Let's begin by filtering the information you want to see below.

Filters

Update Results

Business Unit

Plan

Geography

Vertical

Audience

Marketing Activities

Email 2/2

Events (Other) 1/1

General 1/1

Search Engine Optimization (SEO) 1/1

Telemarketing 2/2

Tradeshow 1/1

Improvements

Upcoming activities this year

MQL 1,197 +0%

Cost \$0

Tactics 11

Activity Distribution

Active Filters

Business Unit: Large Group | Plan: 2014 Plan awesomeness | Geography: All | Vertical: All | Audience: All

Requests 0

Business Unit

Audience

Stage

Vertical

Tactics

Task name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Old Man and the Sea												
Oliver Twist												
To Kill a Mockingbird												
Rule the World												
Party Email												
The first Campaign												
C												
Email 1												
Telemarketing2												
The second campaign												
C												

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Current Request List

New Plan

Edit Plan

Filters

Update Results

Geography

Vertical

Audience

this year

114

\$2,000

3

J

A

J

O

D

Individual

Johnnys Budget

Requests 1

Business Unit

Audience

Stage

Vertical

Tactics

2 Collaborator(s)

Last updated 10/3/2014 3:25 AM

Show Status

Task name	2014											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Johnnys Budget												
Individual Marketing Campaig												
1. Reputation												
PR												

Title	INQ	MQL	CW	Cost	Status
PR	0	0	\$0	\$500	<div><div></div><div></div></div>

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Improved Request Link

HOME

MODEL

BOOST

PLAN

REPORT

Bulldog Gameplan™

Stacy T | Marketing Director

Gp

Hello, Stacy.

Let's begin by filtering the information you want to see below.

Marketing Summary

Projected MQLs

270

+8.0%

Budget

\$800,000

Tactics

36

Tactic Distribution

Filters

Update Results

Business Unit

Business Unit 1

Business Unit 2

Business Unit 3

Business Unit 4

Business Unit 5

Business Unit 6

select all | deselect all

Plan

Plan A

Plan B

Plan C

Plan D

Plan E

Plan F

select all | deselect all

Geography

Vertical

Active Filters

Plan: Plan B, Plan D, Plan F | Business Unit: Business Unit 2, Business Unit 4, Business Unit 6 | Geography: All | Vertical: All | Product: All | Owner: All

Marketing Activities

Fiscal Year: 2015

View By: Plans

Show Status

Task Name

Plan B

Improvement Activi

ERP V10 Product L

Q2 Lead Gen

Conference

Holiday Campaign

Retargeting Campa

Plan D

Campaign A

Campaign B

Campaign C

Campaign D

Campaign E

Pending Tactics

Tactic 1 - Photo Contest

Jul 25 at 03:31 PM

Cost: \$20,000 | MQL: 500

Tactic 2 - Photo Contest

Jul 25 at 03:31 PM

Cost: \$20,000 | MQL: 500

Tactic 3 - Photo Contest

Jul 25 at 03:31 PM

Cost: \$20,000 | MQL: 500

Tactic 4 - Photo Contest

Jul 25 at 03:31 PM

Cost: \$20,000 | MQL: 500

Tactic 5 - Photo Contest

Jul 25 at 03:31 PM

Cost: \$20,000 | MQL: 500

Tactic 6 - Photo Contest

Jul 25 at 03:31 PM

Cost: \$20,000 | MQL: 500

View Tactics

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Improved Centralized Tactic View w/ Filters

HOME

MODEL


BOOST

PLAN

REPORT

Bulldog Gameplan™

▼ Stacy T | Marketing Director



Gp

Filters

Update Results

« Back to Calendar

Business Unit

Business Unit 1

Business Unit 2

Business Unit 3

Business Unit 4

Business Unit 5

Business Unit 6

select all | deselect all

Plan

Plan A

Plan B

Plan C

Plan D

Plan E

Plan F

select all | deselect all

Geography

Vertical

Product

Active Filters

Plan: Plan B, Plan D, Plan F, Plan H | Business Unit: Business Unit 2, Business Unit 4, Business Unit 6 | Geography: All | Vertical: All | Product: All | Owner: Shubham

Tactic List

Create New Tactic

Tactic Title	Cost	INQ	MQL	CW	Start Date	End Date	Status
Tactic 1 - Photo Contest	\$20,000	5000	500	500	01/01/2015	01/01/2015	Pending
Tactic 2 - Photo Contest	\$20,000	5000	500	500	01/01/2015	01/01/2015	Pending
Tactic 3 - Photo Contest	\$20,000	5000	500	500	01/01/2015	01/01/2015	Pending
Tactic 4 - Photo Contest	\$20,000	5000	500	500	01/01/2015	01/01/2015	Pending
Tactic 5 - Photo Contest	\$20,000	5000	500	500	01/01/2015	01/01/2015	Pending
Tactic 6 - Photo Contest	\$20,000	5000	500	500	01/01/2015	01/01/2015	Pending
Tactic 7 - Photo Contest	\$20,000	5000	500	500	01/01/2015	01/01/2015	Pending
Case Study	\$20,000	5000	500	500	01/01/2015	01/01/2015	Approved
Content Syndication	\$20,000	5000	500	500	01/01/2015	01/01/2015	Approved
Data Sheet	\$20,000	5000	500	500	01/01/2015	01/01/2015	Approved
Direct Mail	\$20,000	5000	500	500	01/01/2015	01/01/2015	Rejected
Email	\$20,000	5000	500	500	01/01/2015	01/01/2015	Rejected
Newsletter	\$20,000	5000	500	500	01/01/2015	01/01/2015	Submitted

Improved Review Section

Tactic 1 - Photo Contest

Summary

I'm running a **Photo Contest** tactic called **Tactic 1 - Photo Contest** from **January 15** to **June 15** for the **Utilities** vertical.






The status is: **Pending**.

Details







Budget Actuals **Review** Setup

Parent Campaign
ERP V10 Product Launch

Parent Program
Program 1 Title

15 Jul	15 Sep	200 INQ	52 MQL	
Start	End	Goal	Goal	
 Bus Unit Large Group	 Owner Stacy T.	 Vertical Environment	 Audience Inbound Registrants	 Integration Eloqua

Notes

-  **Sarah** — Stacy I think this looks good.
Feb 5 at 2:38pm
-  Tactic approved by **Sarah**.
Feb 5 at 3:08pm
-  Tactic approved by **Sarah**.
Feb 5 at 3:08pm
-  Tactic approved by **Sarah**.
Feb 5 at 3:08pm
-  Tactic approved by **Sarah**.
Feb 5 at 3:08pm
-  Tactic approved by **Sarah**.
Feb 5 at 3:08pm

Send

Approve Reject

 Share