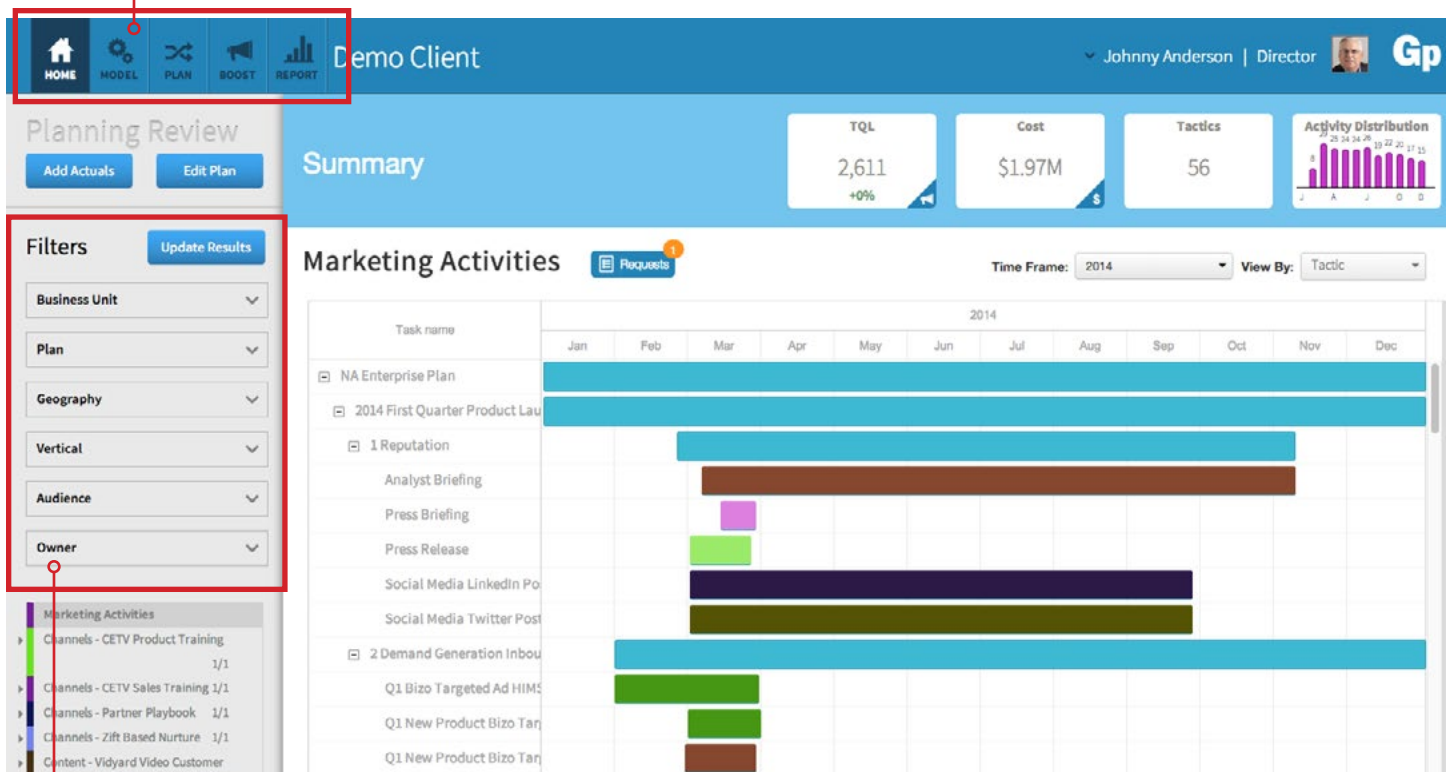


Summary

Today, Gameplan's homepage is not designed to cater to all user groups which include executives, directors, planners, marketing ops and finance. It is very plan centric as it shows a calendar of all plan activities accompanied by a set of filters in the left sidebar. Many great features of Gameplan are hidden from first-time users and would require some explorations to discover.

In this month's UX review, we will attempt to create an actionable homepage/dashboard that consists of meaningful data and usable task-lists. We want the homepage to be something that can be used by a variety of users to complete their daily tasks and make simple decisions.

First-time users might not know what each tab in the navigation stands for.



It is unclear at first a user can use the left filters to narrow down the calendar view.

Problems (with the existing homepage)



Use of top navigation is mandatory

- Users are forced to figure out which tab to click on in the top nav and spend time to decide if they are in the right place
- Returning users should be able to choose their own path when they log in



No guidance for first-time users

- No human friendly language is written to guide first-time users through various tasks such as tactic creation, model creation, report generation, etc.
- Most un-trained users will likely opt out of the software because they are overwhelmed by the number of controls on the homepage



Not tailored to all users

- The calendar view is very planner centric and provides little information for decision makers
- Lack of personal touch could discourage users from continual use of Gameplan

Recommendations (for a new homepage)



Actionable user interface

- Build an interface that consists of charts, figures, ratios and to-do lists that are personalized
- Make it task oriented for users who have limited time to spend in Gameplan



Meaningful data dashboard

- Display only data that is usable and informative for users to act upon
- Tailor to users in different roles so they can focus on their tasks



Mobile friendly

- Create a card/widget-like interface that is flexible enough for mobile
- Ensure each card is action and data focused



Customizable dashboard

- Users should be able to add/remove cards at will
- Drag-and-drop functionality can add a layer of interactivity to the homepage

By default, there will be 3 main sections on the homepage for each user group. In this report, we will focus on directors and planners.

Directors



Section 1: Plans

- **Overall projected vs goal stats** to ensure the team is planning effectively
- **Basic stats** such as recent activities, budgeting numbers, etc.



Section 2: Workflow

- **To-do list** to show tactics that requires feedback and approval
- **Change log** to show changes related to all things a director oversees



Section 3: Financial

- Organization's **quarterly budget**
- **Cost** by custom dimensions

Planners



Section 1: Tactics

- **Overall actual vs projected stats** to ensure tactics are performing as desired
- **Basic stats** such as recent activities, budgeting numbers, etc.



Section 2: Workflow

- **To-do list** to show tactics that have been approved/rejected/commented on
- **Change log** to show changes related to all things a planner is responsible for



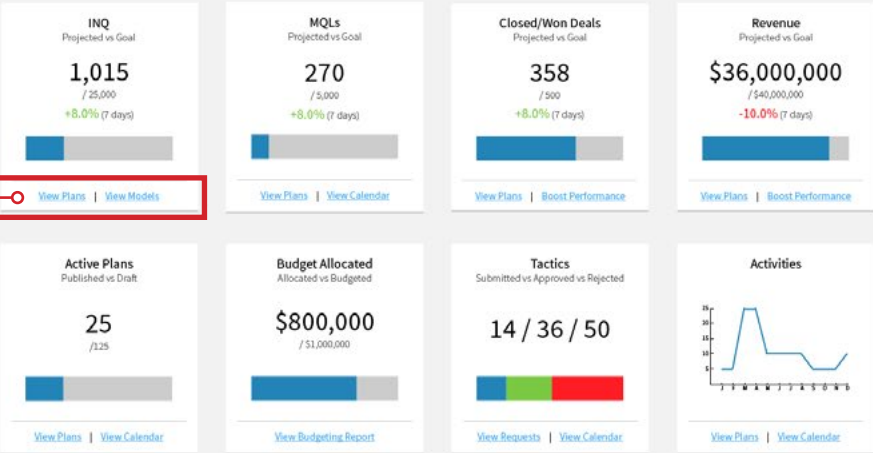
Section 3: Financial

- Organization's **quarterly budget**
- **Cost** by custom dimensions

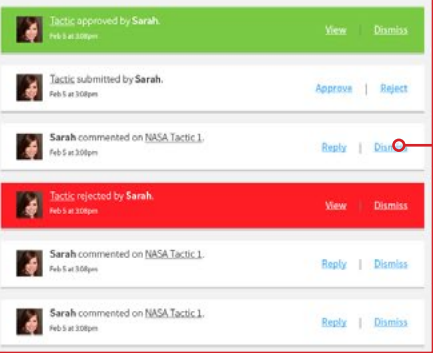
Director Homepage

Action buttons are at the bottom of each card.

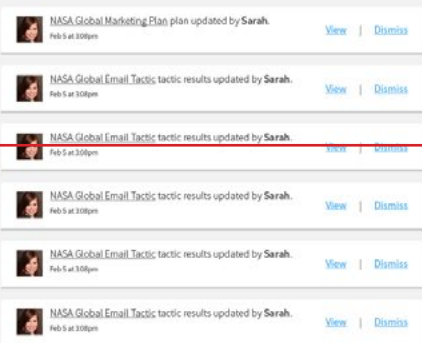
Plans



To-Do's

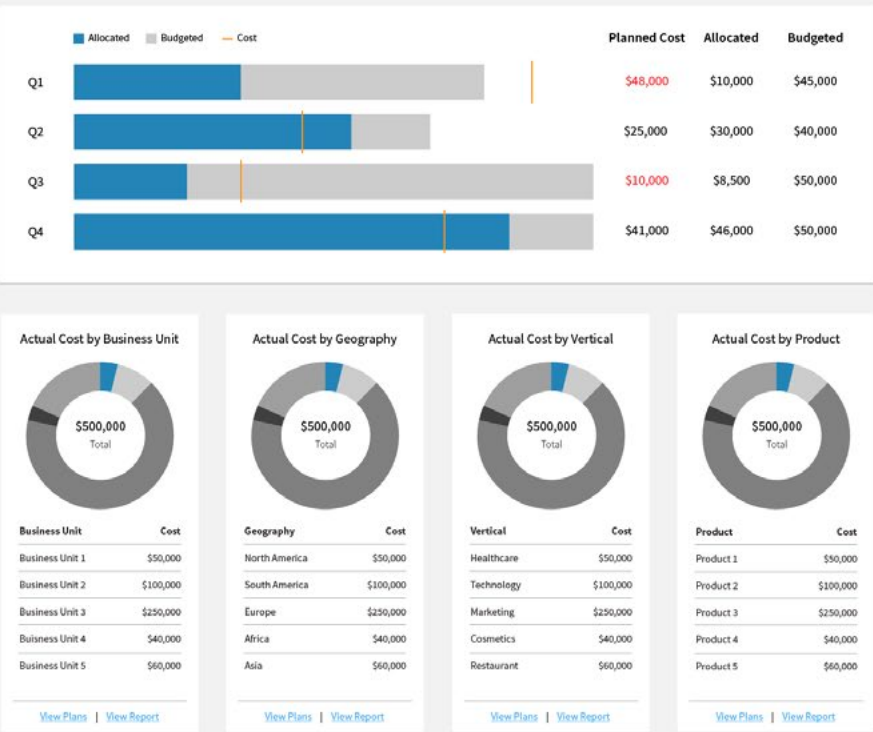


Change Log



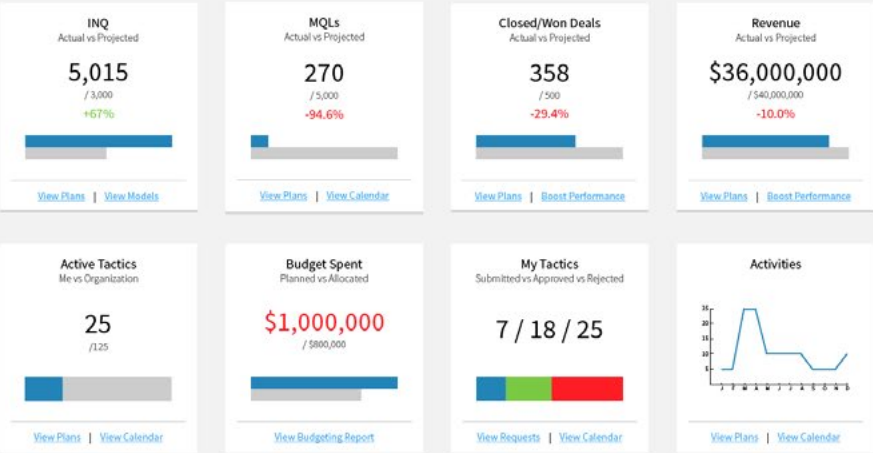
Dynamic to-do list refreshes as users dismiss list items.

Financial

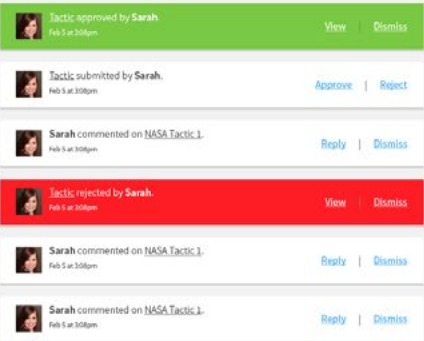


Planner Homepage

My Tactics



To-Do's



Mobile Friendly Design

