## Summary

In this extended version of UX report, we will be looking into ways to improve Gameplan's reporting feature as a whole. The goal is to create a more satisfying experience for both data lovers and executives. We will explore each section of reporting in Gameplan and then propose recommended new experiences and features. At the end of this report, we should have a clear direction on what the new reporting should look like and how the user experience can be improved through added interactions, visuals and usefulness.

Additionally, we would like to create an e-commerce like experience to make the product stand out in the crowd while laying the path for Gameplan to move into a mobile-friendly environment.
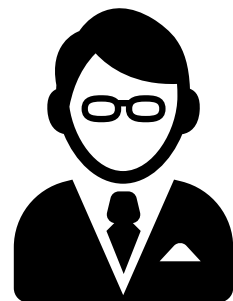
Personas

As always, we start with our users. For this report, we created 3 perceived personas. They are 1. Data Lovers, 2. Managers and 3. Executives. We will look at how each one of them uses our existing reporting feature. This will help us identify the current pain points users have with our product. Then, we will explore potential solutions and features that could help our users carry out their tasks.
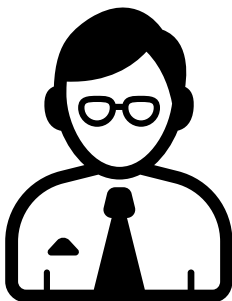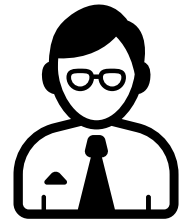

Data Lovers   **Managers**   **Executives**

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Persona 1: Data Lovers

Time Spent: 5x / week (@30 minutes)

Goal: Dig deep into the data and figure out patterns or what is causing a certain problem in the organization, usually per a marketing director's request

Pain Point: Gp's reporting data feels disorganized and sometimes hidden

Solution: Provide users with a simple way to drill down data and compare data set within Gp

New Features:

1. Clickable charts (w/ tabular data displayed in popups)
2. Sortable item list and data set
3. Add-to-compare
4. Export results

Persona 2: Managers

Time Spent: 3x / week (@15 minutes)

Goal: Identify problems before they occur and share with the team so they can start tracking down the source of the problems

Pain Point: It takes too many steps for directors or managers to figure out potential problem areas in their marketing plans

Solution: Include more filter set and add flexibility to the data being displayed on the homepage dashboard with drill-downs enabled

New Features:

1. Dashboard with drill-downs

2. More filters including custom fields such as campaign type, etc.

3. Export and share

Persona 3: Executives

Time Spent: 1x / week (@15 minutes)

Goal: Gain confidence by seeing proof that certain marketing campaigns are working and money is being well spent; to keep shareholders happy

Pain Point: Gp's reporting doesn't provide a quick overview on marketing effectiveness across the entire organization

Solution: Add a graphical and actionable dashboard on the homepage to display quick summaries and enable drill-downs

New Features:

1. Dashboard w/ quick drill-downs

2. View data by all key dimensions such as regions, tactic type, etc.

User Flows

In the flowchart below, you will see the potential journeys our 3 personas can take. At the end of each journey, an export/share option should be present.

Each graph should be tied to a popup table of data.
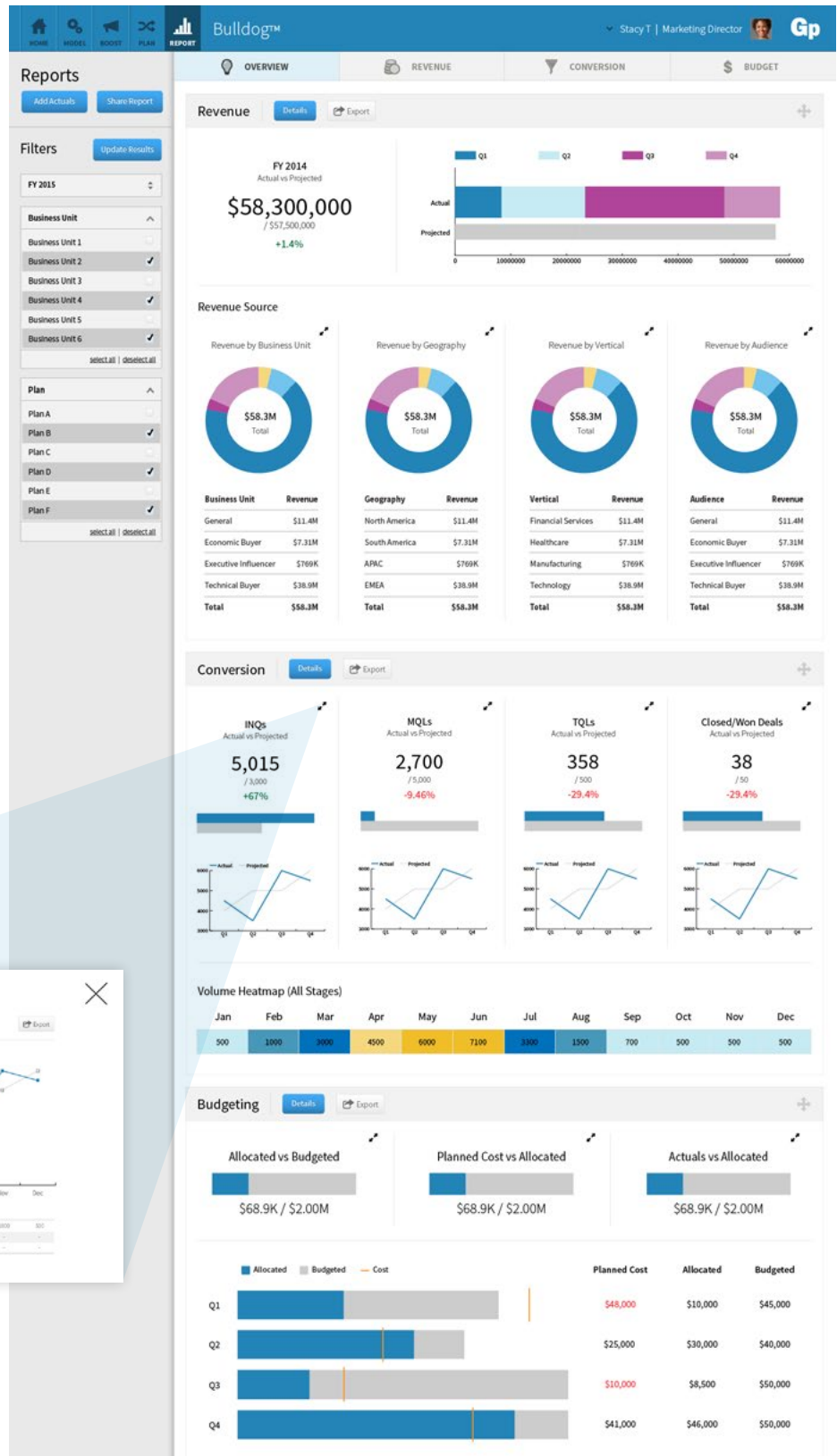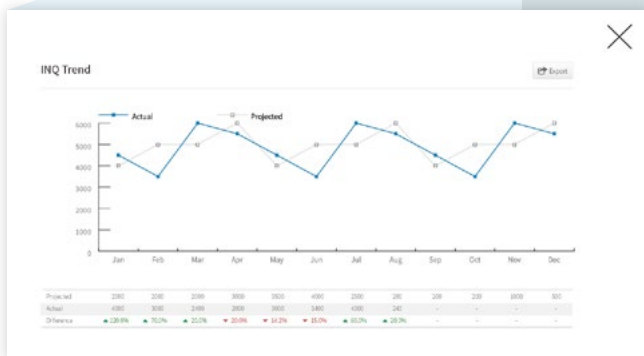
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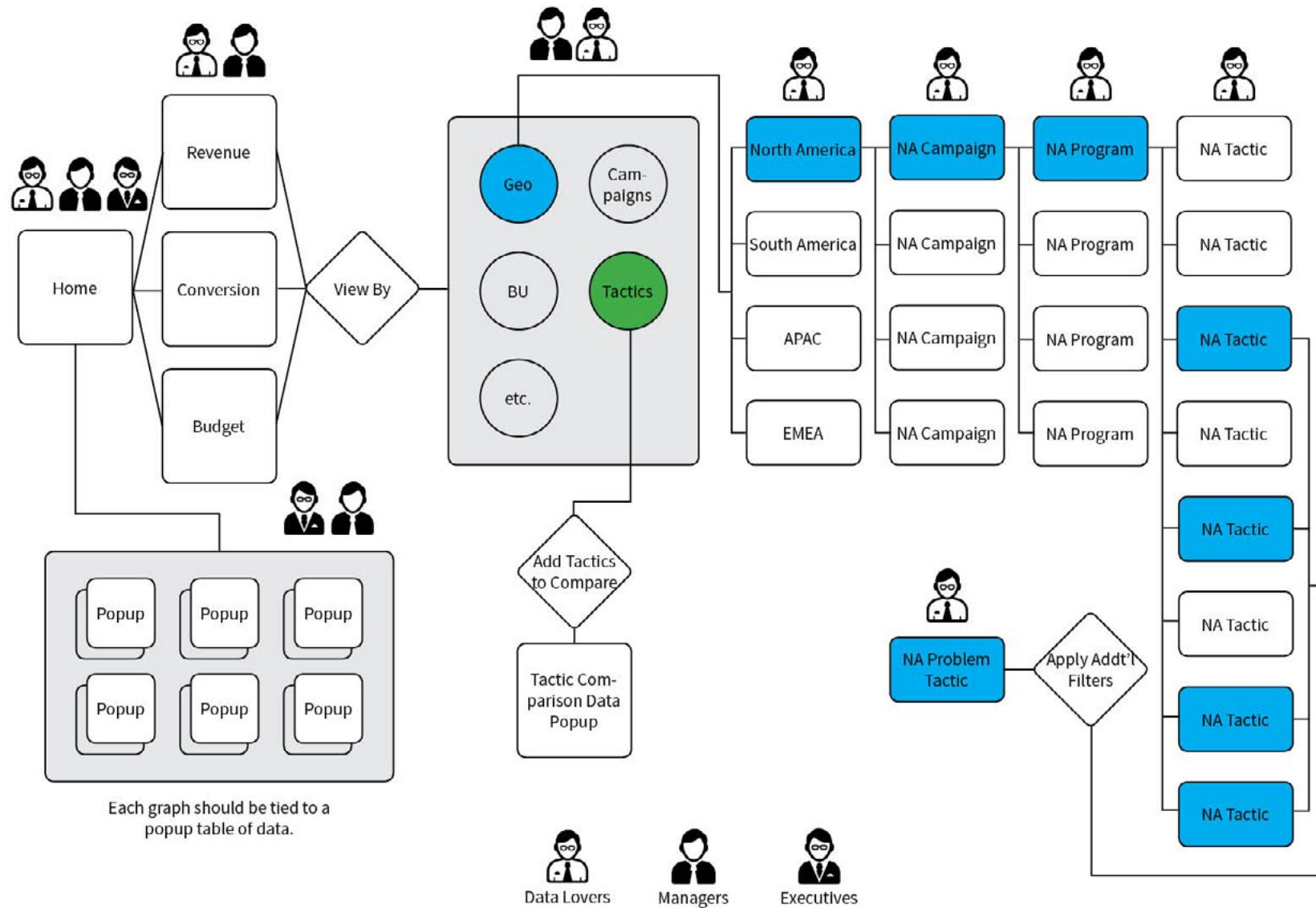
New Features

Homepage Dashboard

This new feature is designed for executives and managers who want quick overview on campaign performances, waterfall stats and budgeting numbers.

Homepage Popups

Each graph is accompanied by a drill-down enabled popup that shows more data in a tabular format.
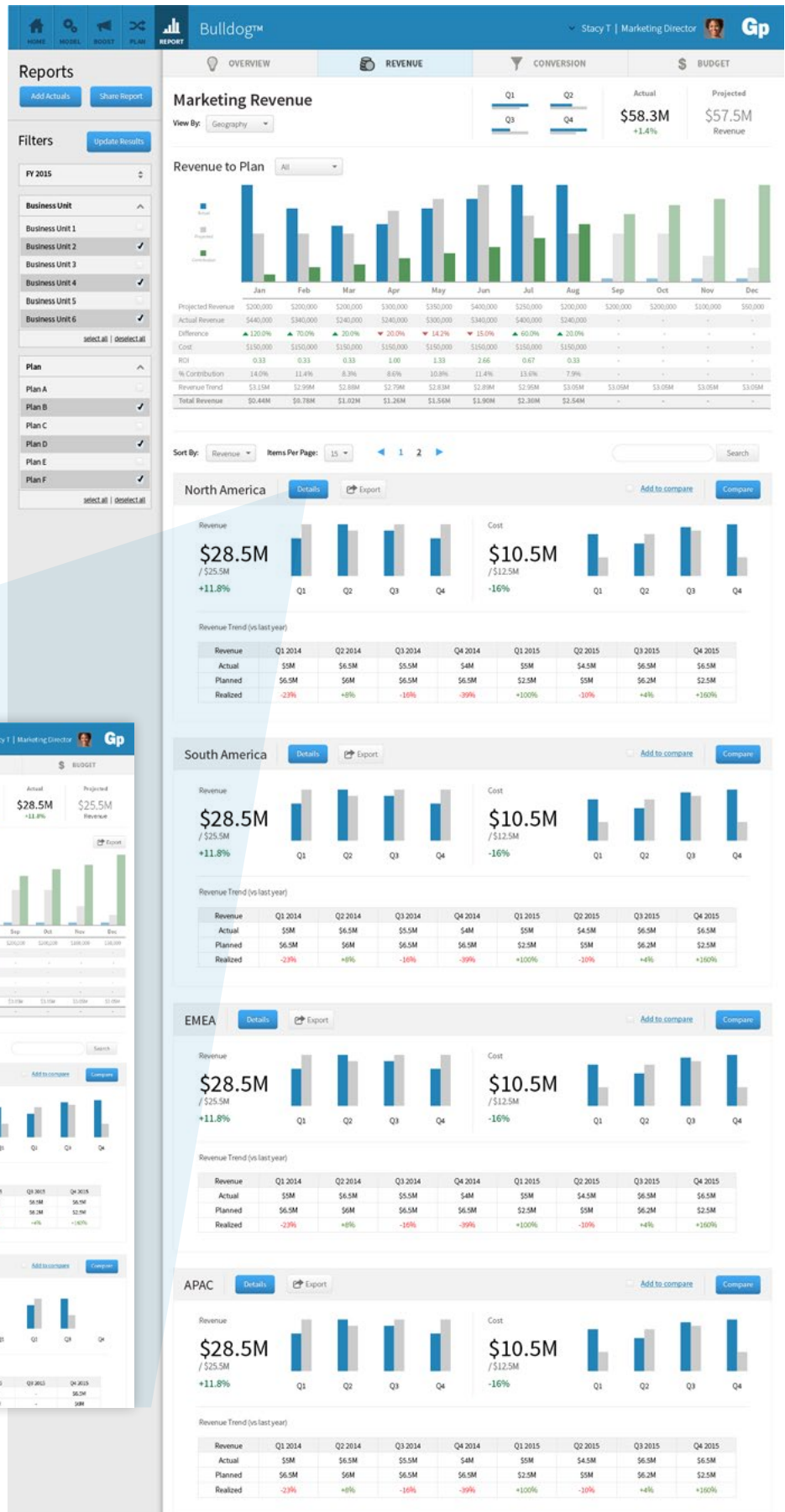
New Features (continued)

Revenue Dashboard

The revenue tab will take users to a dashboard with view-by options for clarity and simplicity.

Drill-Down

Clicking on the "Details" button in an item card (i.e. North America) will take users to its own dashboard with child items.
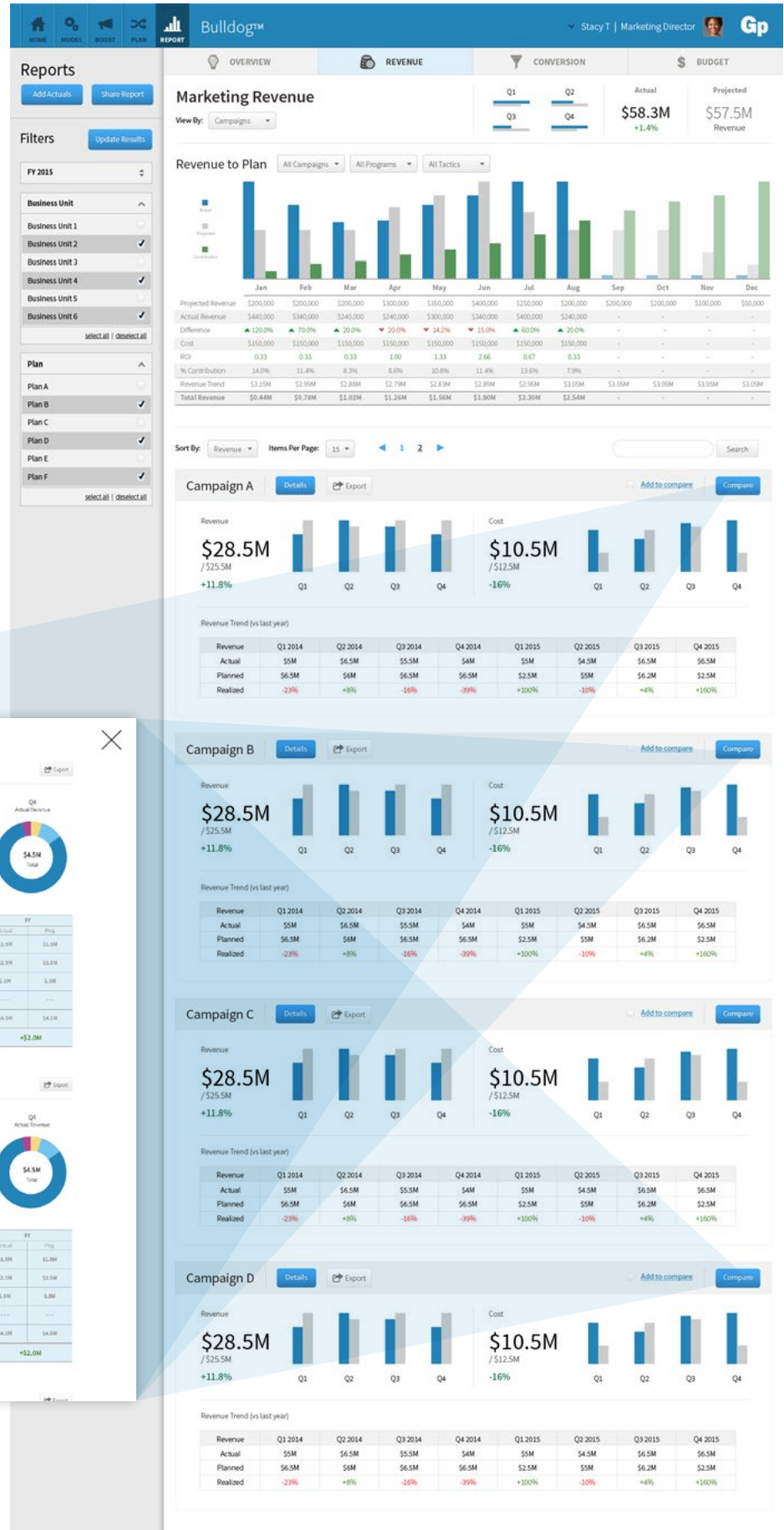
New Features (continued)

Add to Compare

Each dashboard has a list of child items (primarily campaigns) that can be added to a comparison list which generates a popup with more insights.

All popups will have an export/share option for users to save the charts as files or print them out.
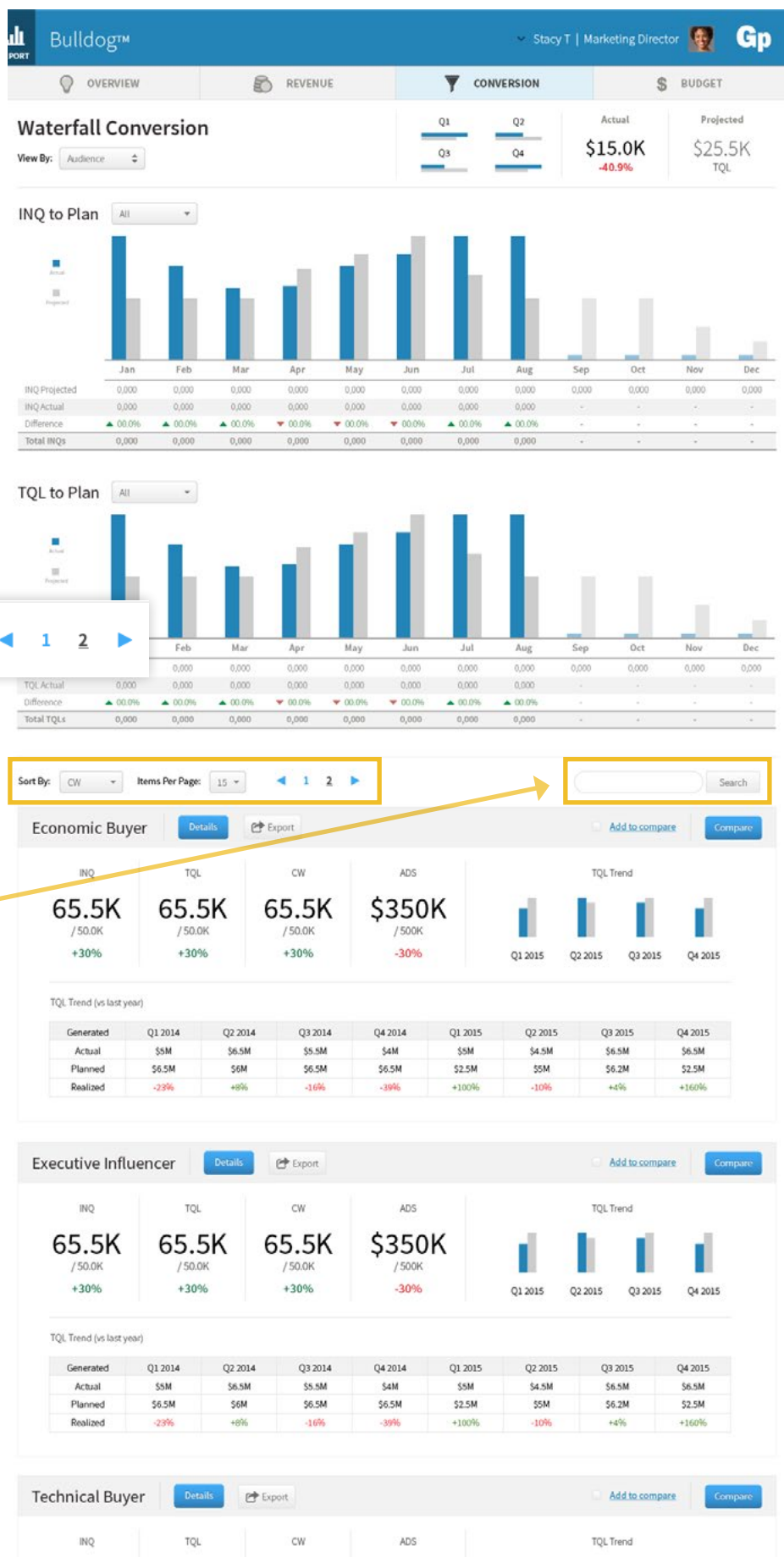
New Features (continued)

Conversion Dashboard

The conversion tab will take users to the conversion dashbaord as shown.

Similar to the revenue dashboard, all items are sortable and searchable with the Sort By feature and the Search Bar.

New Features (continued)

Budgeting Dashboard

The budgeting dashboard by default will look like other dashboards. Additionally, there will be a "Data View" button up top which allows users to toggle between graphical and tabular views.

Conclusion

In 2015, B2B marketers will see the mobile market as mandatory rather than nice-to-have. According to The Mobile Playbook by Google, US consumer's smartphone adoption has grown from 36% to 61%. (http://www.themobileplaybook.com/) With more people on the go, it's unavoidable for Gameplan to become mobile friendly in the near future. One of the features most mobile marketers will want is reporting, with the ability to share results. With the new proposed experiences and features in this report, marketers will be able to stay on top of their marketing game and be pro-active about their marketing effort.

Data lovers will be able to look for patterns and pinpoint problem areas. Managers will have the power to get a quick feel on how their team members and campaigns are performing. Executives will be able to export important graphs and include them in a presentation to share with shareholders and keep them happy. When our customers are happy, Gameplan is happy.

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