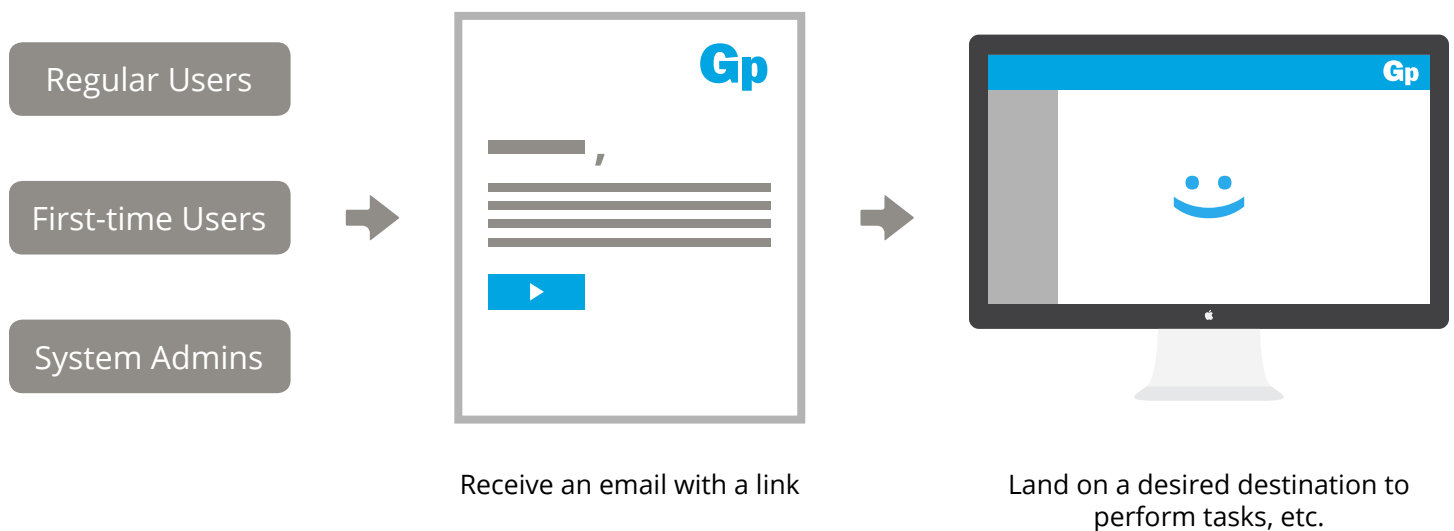


Summary

In this month's review, we will explore how Gameplan's email system is set up to serve our users. Instead of approaching this report from a persona POV, we will look at the system from three types of Gameplan users, identified by behaviors. The three groups are 1. regular user, 2. first-time user and 3. system admin.

First, we will look into how different types of users will want to interact with Gp's email system. We start by looking at their user stories and needs. We will then provide necessary recommendations on email content and end destinations which can imply new Gp features that help facilitate the process.

General Workflow



Email User Stories

As a regular user, I want to

1. **get email updates when my tactics are changed by my colleagues**
2. **get notified when my tactics are approved or rejected**
3. **get notified when I am added to a plan, program, tactic, etc**
4. **get notified when a colleague shares something with me**

so that I can stay on top of my tasks and collaborate with my colleagues.

5. **send a support request when I run into a technical roadblock**

so that I can effectively use Gp to perform my tasks efficiently.

6. **know when my user account details are changed**

so that I can feel in control of my account and personal information.

1 Tactic/Program/Campaign etc. Detail Changes

Tactic Detail Change --> Email --> Tactic Inspection Window

Hello [firstName](#),

Tactic [nameOfTactic](#) has been changed by [nameOfUser](#) on 05/15/2014 15:00:05.

Start Date: 5/1/2015 to 6/1/2015

End Date: 10/1/2015 to 12/1/2015

Cost: \$50,000 to \$250,000

[View Details](#)

Thank you,

Bulldog Gameplan Admin

2 Status Changes

Tactic Status Change --> Email --> Change Log*

Hello [firstName](#),

Tactic [nameOfTactic](#) has been approved by [nameOfUser](#) on 05/15/2014 15:00:05.

Status: Submitted to Approved

[View Details](#)

Thank you,

Bulldog Gameplan Admin

Hello [firstName](#),

Tactic [nameOfTactic](#) has been rejected by [nameOfUser](#) on 05/15/2014 15:00:05.

Status: Submitted to Rejected

[View Details](#)

Thank you,

Bulldog Gameplan Admin

Hello [firstName](#),

Tactic [nameOfTactic](#) has been re-submitted by [nameOfUser](#) on 05/15/2014 15:00:05.

Status: Approved to Submitted

[View Details](#)

Thank you,

Bulldog Gameplan Admin

3 Tactic/Program/Campaign Owner Changes

Tactic Owner Change --> Email --> Tactic Inspection Window

Hello [firstName](#),

You've been added to Tactic [nameOfTactic](#) as an owner by [nameOfUser](#) on 05/15/2014 15:00:05.

[View Details](#)

Thank you,

Bulldog Gameplan Admin

4 Support Requests or Customer Feedback*

User Question --> Send email with Screen Capture* --> Email --> Support Thread*

Hello [firstName](#),

Your support request has been received on 05/15/2014 15:00:05.

Message:

"Hello Bulldog, I have a question on the budgeting feature. I couldn't figure out how to allocate a budget for my Q1 campaigns."

[View Ticket](#)

Thank you,

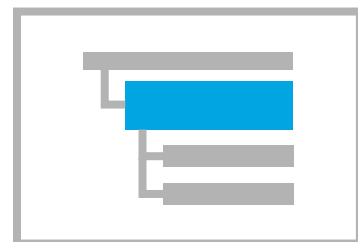
Bulldog Gameplan Admin



Submit a request (w/ screen capture)



Get a summary email



Land on a page with conversation threads*

5 Share Plans, Tactics, Reports, etc.

Share Report --> Email with Screenshot --> View Attachment

Hello [firstName](#),

A report has been shared with you by [nameOfUser](#) on 05/15/2014 15:00:05.

[View Report](#)

Thank you,

Bulldog Gameplan Admin

Share Plan --> Email with link --> View Plan

Hello [firstName](#),

A plan named [nameOfPlan](#) has been shared with you by [nameOfUser](#) on 05/15/2014 15:00:05.

[View Plan](#)

Thank you,

Bulldog Gameplan Admin

6 User Account Details

Email --> Password Reset

Hello [firstName](#),

This e-mail has been sent in response to your request for help resetting your Gameplan password.

To initiate the process for resetting the password for your Gameplan account, follow the link below:

[Reset Your Password](#)

Note that this e-mail will expire on [ExpireDateToBeReplaced]. If it expires before you are able to complete the password reset process, you may request a new password reset.

Thank you,

Bulldog Gameplan Admin

As a first-time user, I want to

1. **get notified when credentials are created for me to log into Gameplan**
2. **get a list of helpful resources that could get me started with the software**

so that I can start learning and using the software as intended.

1 Account Creation

Account Creation --> Email with Login --> Gameplan Site

Hello [firstName](#),

A Gameplan account has been created for you. Please use the following credential to log into Gameplan and start planning today.

User Name: nlee
Password: abc12345

[Log into Gameplan](#)

Thank you,

Bulldog Gameplan Admin

2 Helpful Resources

Log into Gp first time --> Email with helpful links --> Helpful Resources*

Hello [firstName](#),

Welcome to Gameplan. To help you get started, we created a list of resources below. Should you have any questions/feedback, please feel free to use the Support link located in the header.

Video Hub: [Learn the Gp basics](#)

Support Forum: [View a list of helpful topics on using Gp](#)

Guided Tour: [Get familiar with the navigation and controls](#)

Thank you,

Bulldog Gameplan Admin

As a system admin, I want to

- 1. know when an integration fails to connect**
- 2. know when users are added or removed by a manager**

so that I can monitor backend activities easily and keep the system running smoothly.

1 Integration Updates

Integration Failure --> Email with instance name --> System Preference

Hello System Admin,

Scheduled integration windows service has stopped working at [time].

For more detail please look into log file.

[View Log File](#)

Thank you,

Bulldog Gameplan Admin

2 User Management

User Added or Removed --> Email Notification

Hello System Admin,

User [userName](#) has been [added/removed] by [nameOfUser](#) on 5/15/2015 00:00:00.

Thank you,

Bulldog Gameplan Admin

*Based on the users stories, we have identified a few new features that can help create a more satisfying experience for the three groups of users.

1. A new email template (estimated dev. time = 3 days)

2. A sortable Change Log that stores helpful meta data (estimated dev. time = 1 week)

3. A Customer Feedback/Support mechanism that enables conversation threads and replies (estimated dev. time = 3 to 4 weeks)

4. A Gp Video Hub that stores release notes and tutorials, etc. (estimated setup time = 1 to 2 weeks)

5. A User Profile page that shows all recent activities of a particular user (estimated dev. time = 2 to 4 weeks)

Email Template



Hello firstName,

Tactic [nameOfTactic](#) has been changed by [nameOfUser](#) on 05/15/2014 15:00:05.

Start Date: 5/1/2015 to 6/1/2015
End Date: 10/1/2015 to 12/1/2015
Cost: \$50,000 to \$250,000

[View Details](#)

Thank you,

Bulldog Gameplan Admin
[Go to Gameplan](#)

Tactic Change Log



Tactic 1 - Photo Contest

Edit

Add

Delete

Machine Name: 2015_na_tactic_1_photo_contest

[Change Log](#)

< Back to Setup



Change Log

Export to .csv

Description	Date ▾	Time ▾	User ▾	Area ▾
The status of this tactic has changed from Approved to Submitted .	1/15/2015	15:05:00	Kai	Budget
Planned cost was changed from \$1,500 to \$2,000.	1/15/2015	15:05:00	Kai	Setup
A line item was added to this tactic.	1/15/2015	15:05:00	Johnny A.	Other
The status of this tactic has changed from Submitted to Approved .	1/15/2015	15:05:00	Stacy M.	Setup
This tactic was approved by Johnny Anderson.	1/15/2015	15:05:00	Shubham	Review
This tactic was moved to the program APAC Viral Marketing .	1/15/2015	15:05:00	Kai	Other
Actuals was added by Stacy Marketing.	1/15/2015	15:05:00	Stacy M.	Actuals
Actuals was added by Stacy Marketing.	1/15/2015	15:05:00	Stacy M.	Actuals
Actuals was added by Stacy Marketing.	1/15/2015	15:05:00	Stacy M.	Actuals
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