

Trade Force

#1 solution for Trade Marketing field teams management

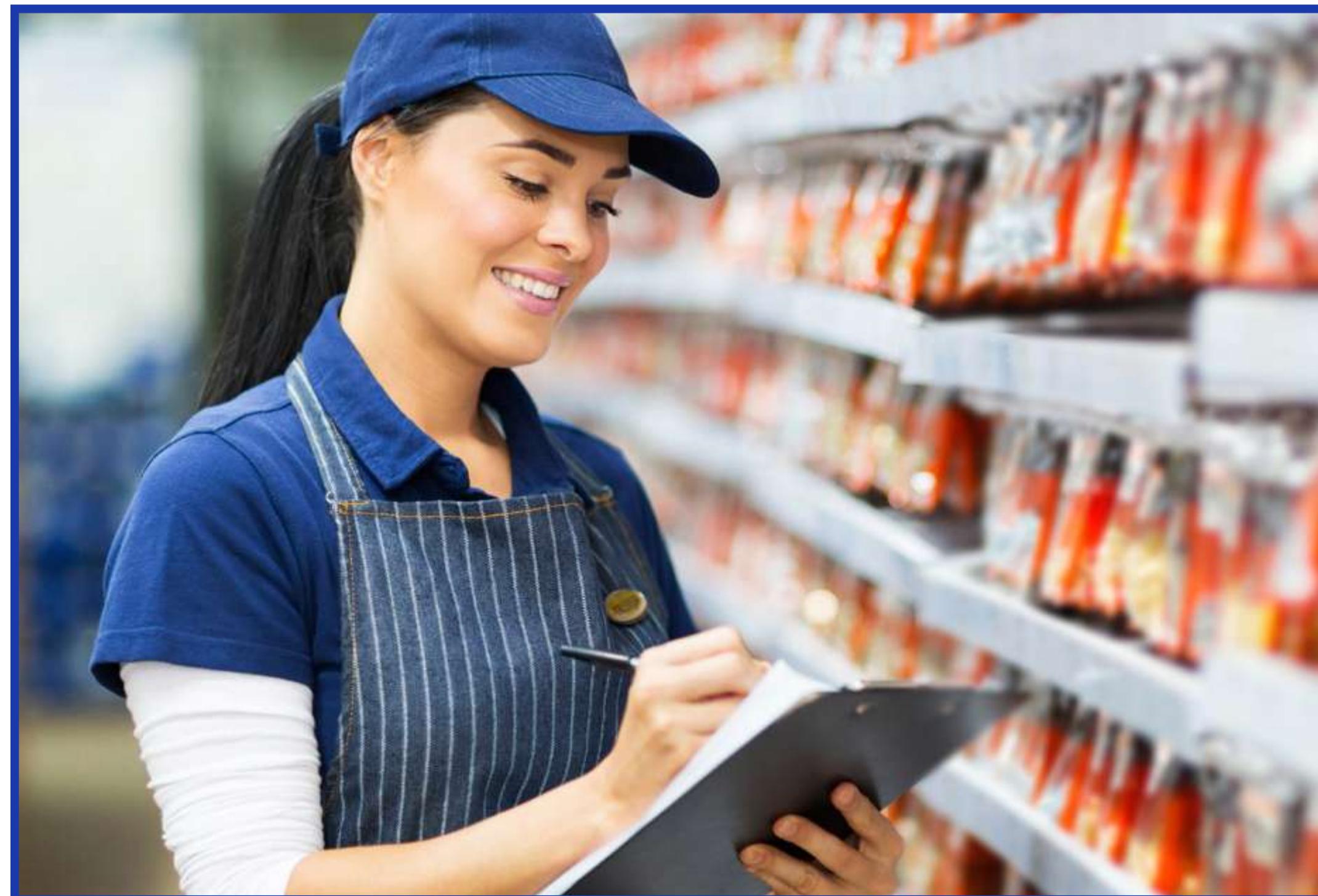
Product design case study

9C

Project background

In the business of Trade Marketing in Brazil, there was an opportunity to **help companies optimize their sales at the Points of Purchase (stores) by using digital solutions.**

The way companies auditioned the promotion/availability/merchandising of the products at the point of sale was far from ideal, as **they did not have tools that made their field team work easier** and they **did not have enough data** to make more informed decisions.



Challenge

- Design a solution to help trade marketing field team managers to create and follow the tasks performed by their teams in real time, including tracking routes and product validation at the POS. Also help them visualize relevant data by designing complete dashboards with advanced monitoring indicators.
- Design a solution to help the field teams do their jobs with more efficiency.

Products

- Trade Force App (for field team members)
- Trade Force Web (only for trade marketing managers)

My role

As the sole designer in the startup, I was responsible for owning end-to-end design process for every product:

- Competition analysis
- User research
- User flow & stories
- Persona creation
- Wireframing / Prototyping
- UI Design
- Usability testing
- Front-end development



Research

Interviews

During the research phase of the project, I interviewed ten people (five field team members and five managers) to gain a better understanding of their pain points, motivations and challenges.

Interview objectives (managers):

- Understand how managers were currently managing their field team;
- Understand how they create itineraries and routes for their team;
- Understand how they create the forms for product placement validations in POS;
- Learn how they gather the all the relevant data from their team and how they analyze and act upon it;

Interview objectives (field team members):

- Learn how users feel about each tool and what are their motivations;
- Understand how they plan their day and execute their daily tasks;
- Understand how they report their work to their managers;
- Create a list of actionable objectives to help them make their daily work easier and more enjoyable

Affinity diagram

With the data gathered from the interviews, I created a affinity diagram to better organize some of the thoughts, pain points and goals and needs from both managers and field team members, so I can put myself in their shoes when designing new solutions. Some of them are show here on the right.

| Goals | Activities and tasks | Pain points | Improvement opportunities |
|---|---|--|---|
| Create strategies for optimal exposure and sales of products on various POS | Create routes and forms for each member of their team | Routes are created manually, by hand, and usually are not optimized for each team member | A automated way to create routes for their team |
| Manage, train and motivate their teams to apply said strategies in the POS | Follow their team activities to ensure everything is correct | The only way they can contact their team to know what's happening at the moment is by calling them | Use mobile technology in their favor with GPS check-in/out for POS visits |
| Help their teams to execute their job in the best way possible | Analyse the data captured in each POS and take any necessary action | All the data is gathered on paper. It takes a lot of time to put them in a Excel file and extract useful information | An easier way to create forms for their teams and each POS |
| Gather as much relevant data as possible with each team's POS visit | Follow their daily route and visit 3-5 POS a day | Hard to follow the team achievements, no centralized way to keep track of activities and reports | Have the data in a simple, customized, digestible way |
| Optimize product display / availability on the points of sale | Make sure the products and merchandising placements are correct | Forms are answered with paper and pen | Keep track of their POS visits, achievements, and form answers |
| Generate reports from POS | Analyze competitors placements, verify price, product inventory and rupture | Spend A LOT of time in the traffic jam doing a nonsense route from a POS to another | Have their route planned in a smarter way |
| Execute Trade Marketing strategies provided by their managers | Report gathered data from POS to their managers | No way to track their achievements or motivation to go beyond their role because there's no way to prove it | Checkin/checkout from POS via GPS and take pictures with each validation |
| | | Cannot prove to managers that they have been to a certain POS or not, can be accused of not going to work | Access to video trainings and performance tracking |

Managers

Field team members

Personas

After consolidating and analysing the research data gathered, I came up with 2 personas that best describe the demographics of Trade Force's target market - the trade marketing field team member and the team manager.

These personas allowed us constantly be reminded of the people that I am designing the product for, their needs and wants, as well as pain points.

The Trade Marketing field team member

Carla César

| | |
|---|--|
|  Occupation Retail merchandising promoter |  Location São Mateus, Brazil |
|  Age 22 |  Family Single |
|  Education Completed high school | |
| Technology Carla is not a tech enthusiast and doesn't own an expensive mobile device. For work purposes, she uses a device provided by her company. | |

Needs

- Carla has to visit 4-8 points of sale a day and the majority of them are far from her home. Every morning she has to figure out by herself what will be the best route for her and organize the visits accordingly.
- She has to fill the forms, take pictures and create reports by hand at each POS she visits
- She also aims to make her time more productive by using her phone to take pictures and take notes

Pain points

Carla gets very frustrated with some of the routes that are provided to her. Some of the POS she has to visit are too far from her house, some are near. Route is not optimal and she has to go back and forth. Sometimes she wastes a lot of time on traffic jam or does not know the best way to get to her next POS, which makes the planning not ideal at all.

Also writing reports manually takes a lot of time for her and it is very tiring to do that at the end of the day. Sometimes she can miss important points for her achievements.

She also has no way to prove to her manager how her performance is going, and also that she has been to a given POS in a day



"I need to provide my manager with all the data gathered from the many POS I visit everyday in a fast, reliable way. I wish I had better route planning as I lose a lot of time commuting"

The Trade Marketing manager

Camila Droghetti

| | |
|---|---|
|  Occupation Merchandising coordinator |  Location Florianópolis, Santa Catarina |
|  Age 37 |  Family Married. 2 children. |
|  Education Post-graduation in Marketing | |

Needs

- To oversee her team's work to make sure they are doing the right thing in order to be more efficient and get better results
- Take data-driven decisions based on the information gathered by her team and create appropriate strategies to be applied on the next visits.
- Make her team's work easier by providing them with the right tools

Pain points

Camila doesn't have any centralized tool to gather all this data and spends a lot of time and energy doing daily spreadsheets and creating charts and dashboards to organize data in order to take action / decisions or to present them to upper management.

She also finds it hard to follow their team's activities in order to help them in real time with any information needed



"I spend too much time inputting data gathered from my field team into spreadsheets and that makes it more difficult to take actions based on data. I also wish to track my team tasks in real time so I can react quickly to any issues that happen"



Competition analysis

In order to understand the market that Trade Force is in, and the competitors within it, I conducted an industry benchmark on features, design styles and channels.

Looking at immediate competitors in the trade marketing sector, as well as smaller competitors, gave me a good idea of what was available to customers then, and how I could do things better.

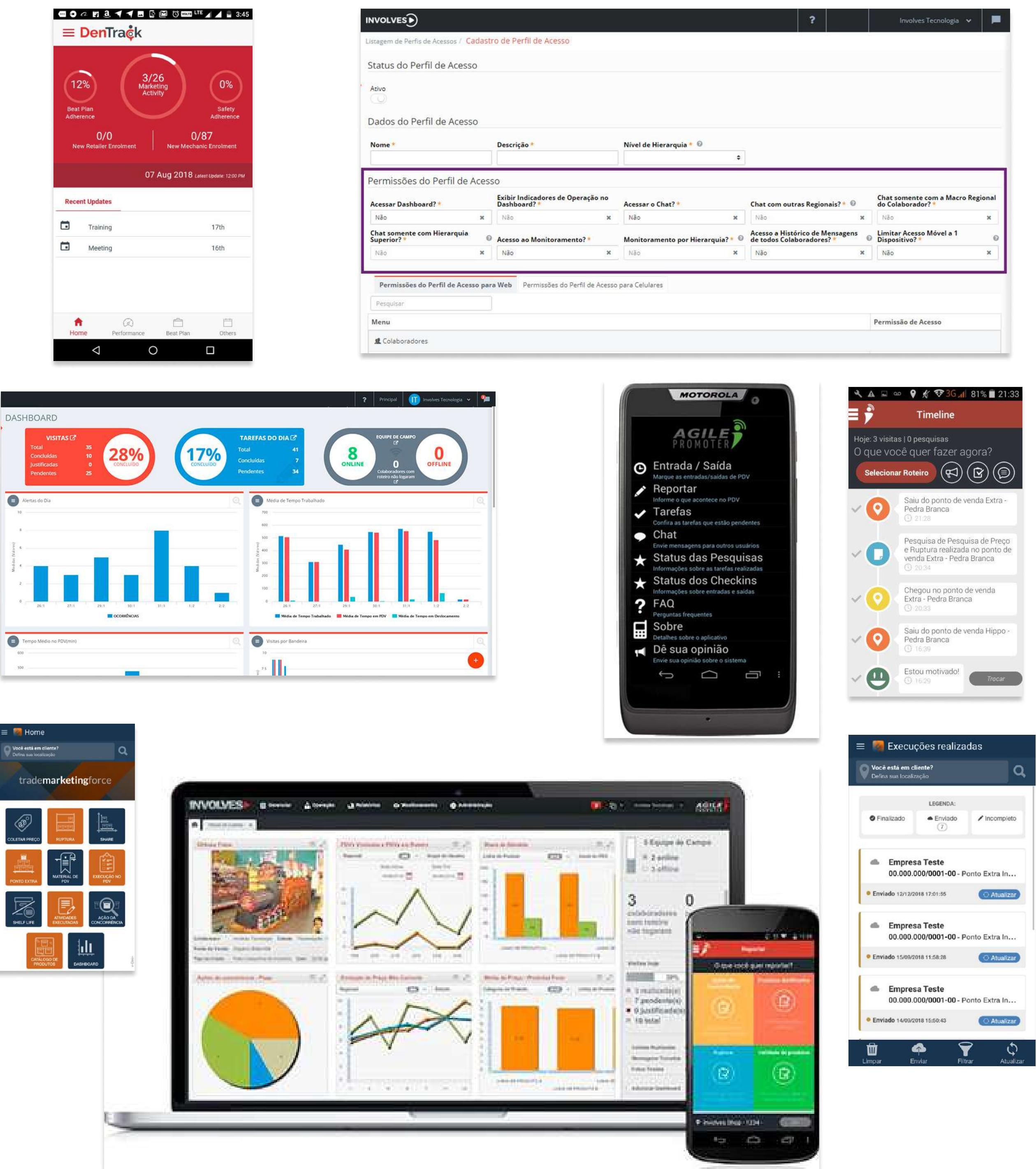
Main takeaways

Patterns between competitors

- Heavy use of graphical dashboards to inform data points;
- Filters for displaying information in reports;
- Similar basic features such as routing, GPS check-in/out at POS, product placement photography and others;
- All of them had mobile apps for field teams and a web dashboard for managers;

What could be improved

- None of the competitors analyzed had consistent design between the platforms and no design system in place
- Most interfaces were confusing at times, no clear distinction between elements and lots of heuristic rules were missing, lack of structure
- Could not find a smart way to create forms
- Routing options were limited and very manual
- It was very hard to find specific information in the dashboards
- Lack of helpful features based on what I found about user pain points
- Limited number of reports available
- Lack of customized reports
- Some of the competitors' apps had too much information clumped in one small screen instead of using smarter ways to show relevant information
- And many, many others





Problem statement & HMW's

After gathering this data, it was time to have a clear description of the issues that I needed to address, keeping the focus on the users at all times.

Together with some stakeholders from the company, we did a 'How might we' session to better define the main problem we need to solve.

"Trade Marketing managers have a hard time tracking their field team and compiling the data due to lack of available tools that help their work."

"Field team members waste a lot of time planning and going from one POS to another without a smart route and have to do all their work manually. Also, they don't have a way to keep track of their work"

HMW...

Help TM managers to track their team's work reliably?

HMW...

reduce the amount of time field members spend commuting ?

HMW...

make it easy for TM managers create routes, activities and tasks for their team?

HMW...

Enable field team members to be more organized, fill forms faster and reliably?

HMW...

Help TM managers feel less overwhelmed with data?

HMW...

Enable field team members to keep track of their work?



User stories / MVP

User research and persona creation brought up the users main needs, goals and pain points. The How Might We statements highlighted the main problems we needed to solve.

Therefore, I found that the main issues my design decisions had to solve for a MVP were:

- Make it easy for the Trade Marketing manager to create personalized routes for their members. Also, make a intuitive interface to create forms to send to their team members and keep track of it.
- Make it easy for the field team members to check in and check out at each POS.
- Create a easy and intuitive solution for the field team members to execute their work in a faster way, filling forms and taking pictures in their mobile phone.
- Send the gathered daily data via app for the managers to receive them in form of custom reports and dashboards.

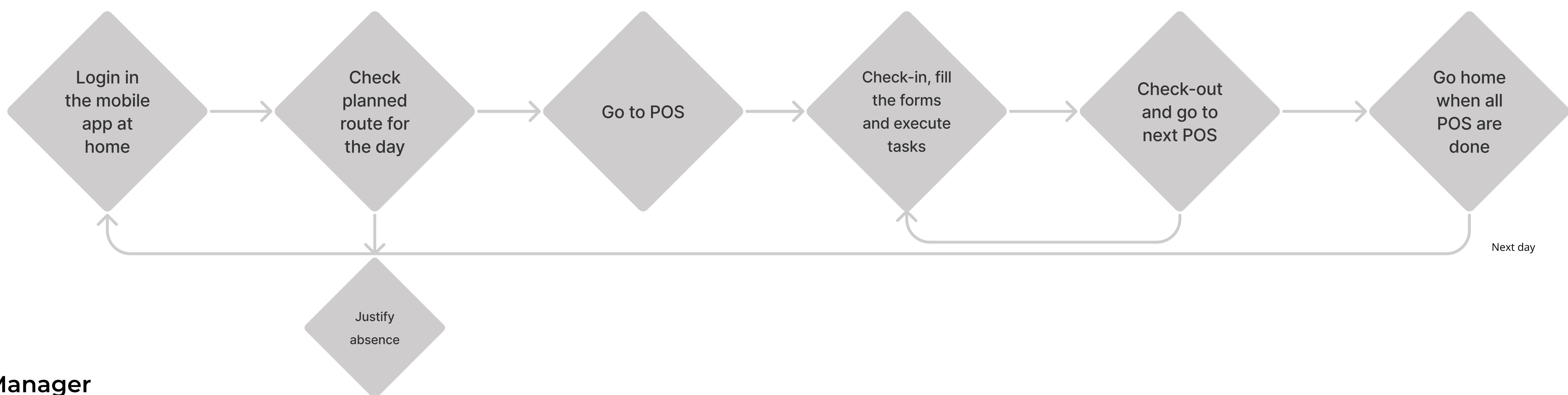
Based on this information, I was able to create user stories and define the MVP.

| MVP/REASON | USER STORY | REQUIREMENTS |
|--------------------------------------|---|--|
| Login and register teams | <p><i>As a TM manager, I want to register my team members and their information in the system so I can keep track of it.</i></p> <p><i>As a field team member, I want to login in my phone with my user name to access my account and start doing my work.</i></p> | <ul style="list-style-type: none"> • Trade Force provides managers the login details for each company • Manager logs in web application • Manager registers their team members profile • Field team members set up their password and their personal data, home address • Field team members can login in the app with this information |
| List of points of sale | <p><i>As a TM manager, I want to have a list of all the relevant points of sale which my team members can visit so I can distribute the routes</i></p> | <ul style="list-style-type: none"> • Database with all registered points of sale from third-party company |
| Map access and route creation | <p><i>As a TM manager, I want to have my chosen points of sale available in a map so I can choose the ones closest to each team members' residence.</i></p> <p><i>As a field team member, I want to have a list of points of sale in the app map so I can plan my day and my routes</i></p> | <ul style="list-style-type: none"> • Enable communication with API of any map services (Google maps, Mapbox, etc) • Web UI for choosing the relevant POS for each team member according to their home address • Web UI for managers to suggest routes/order of visit • Mobile UI for field team members to see and execute their daily route |
| Check in / Check out | <p><i>As a TM manager, I want to the information of when and where a member of my team entered and left a POS to make sure all of them were executed correctly and in a timely manner. Also, I want to know if a POS wasn't visited and why.</i></p> <p><i>As a field team member, I want to do the check-in in the app as soon as I enter the POS and the check-out as soon as I leave it. I also want to be able to justify an absence for a given POS.</i></p> | <ul style="list-style-type: none"> • Enable location services • Mobile UI for check in and check out • In-store tasks can only start after check-in • Next POS can only be started after check-out • Info of time of check-in and check-out are collected • Possibility to justify an absence in a given POS |
| Form creation and execution | <p><i>As a TM manager, I want an easy way to create forms for my team members to fill while they are in each store, with relevant questions for my needs, so I can gather important data to take actions for my products in each store. I also want an easy way to assign forms to various POS and vice-versa</i></p> <p><i>As a field team member, I want to answer my manager forms in my mobile phone as quick and easily as possible in each store so I can make my work faster and more productive</i></p> | <ul style="list-style-type: none"> • Intuitive Web UI for form creation • Easy way to import/register products for referencing in forms • UI for creating multiple types of questions • Possibility to assign forms to each POS and vice-versa • Intuitive Mobile UI for answering the forms |
| Reports & Dashboard | <p><i>As a TM manager, I want to have access to all gathered data from all the POS daily so I can create customized reports and take adequate action and/or present my team's work to upper management</i></p> <p><i>As a field team member, I want to keep track of my daily work and my achievements so I have enough evidence to justify my performance with my manager.</i></p> | <ul style="list-style-type: none"> • Comprehensive dashboards • Both ready-made and custom reports • Filtering • Real-time update |

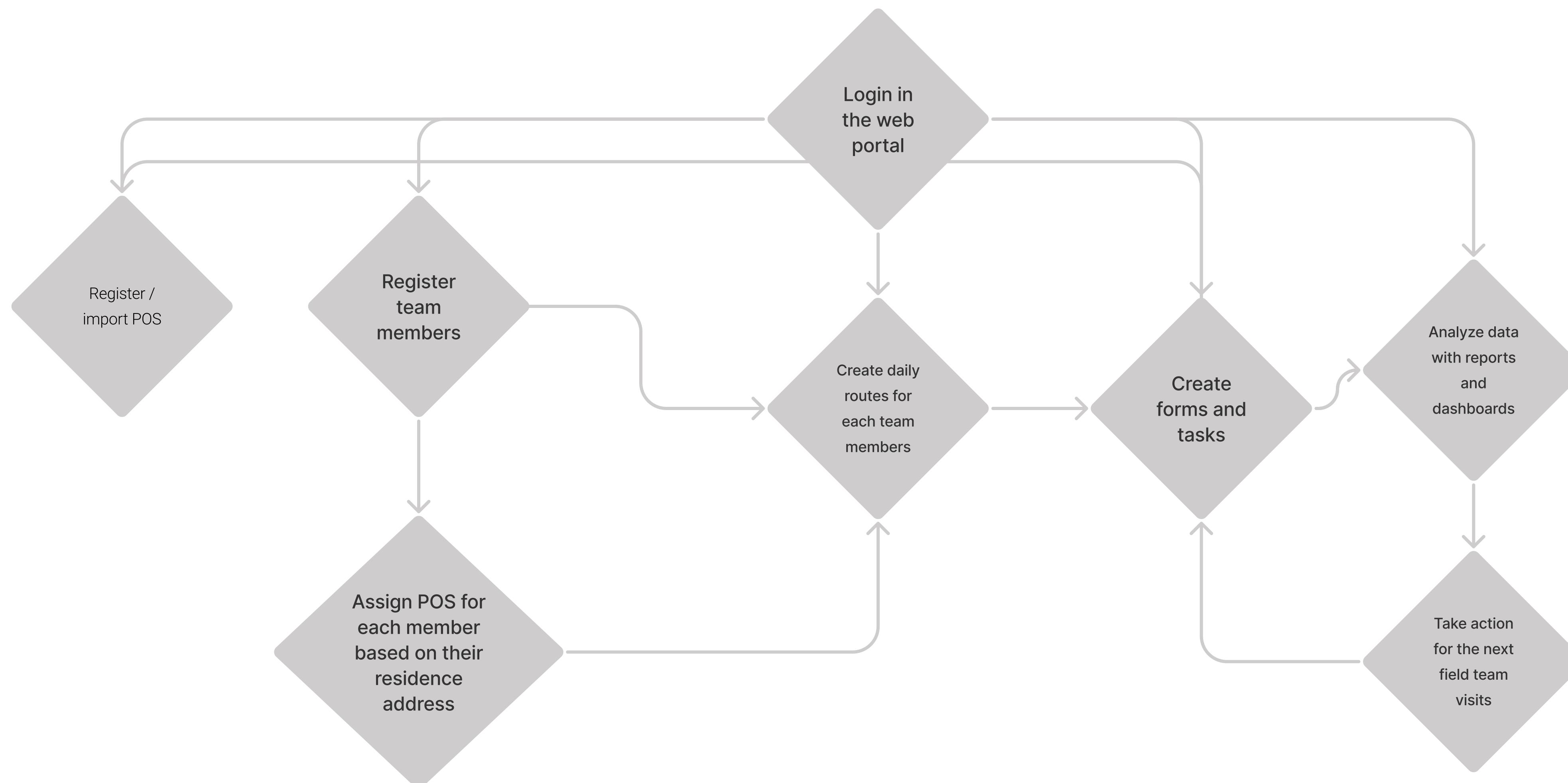


User flow

Field team member



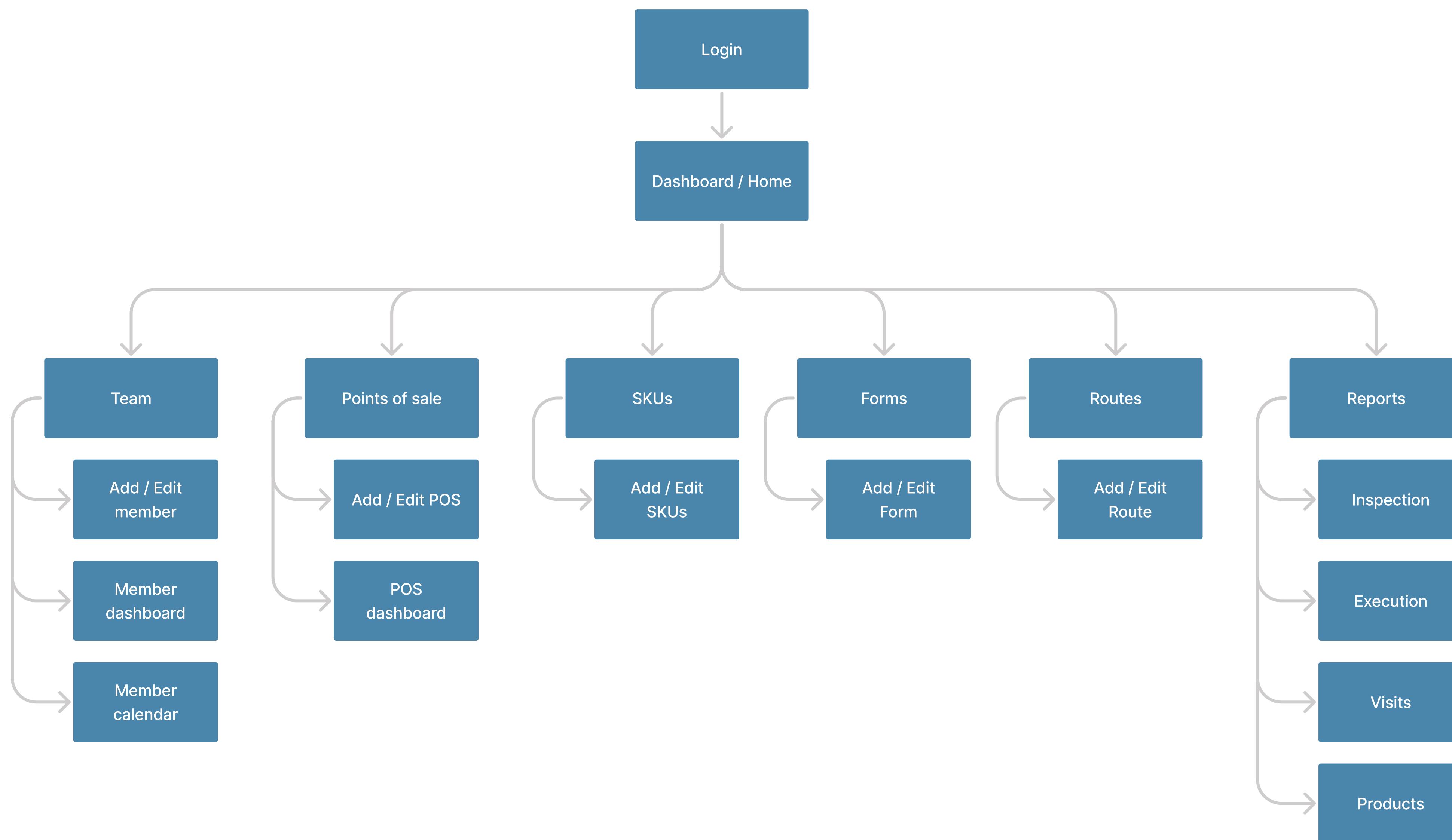
Manager



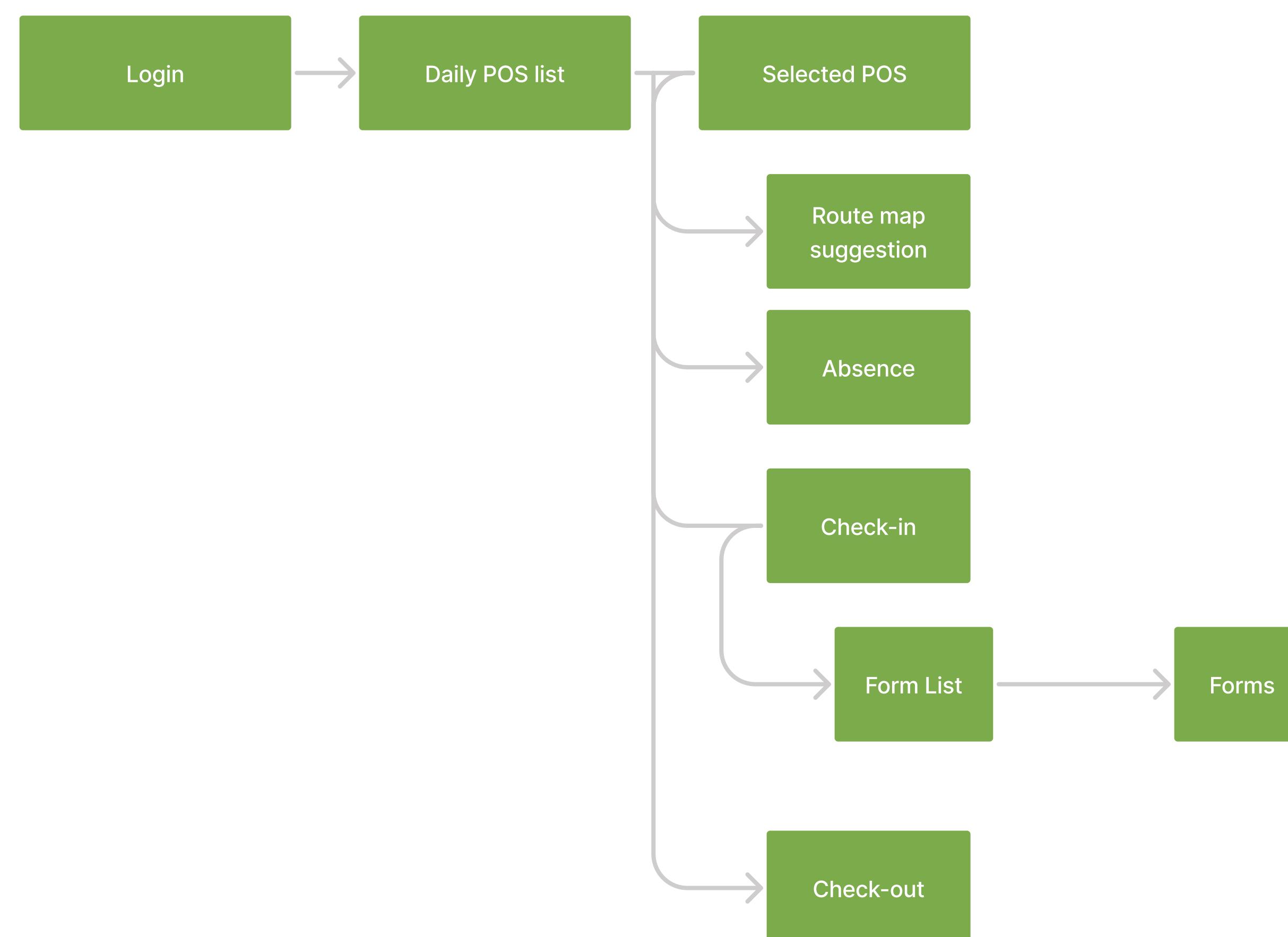
Sitemap

The next step was creating a sitemap for both applications, in order to architect the information better and plan the organisation of pages to improve usability in the early planning stages.

Web



Mobile

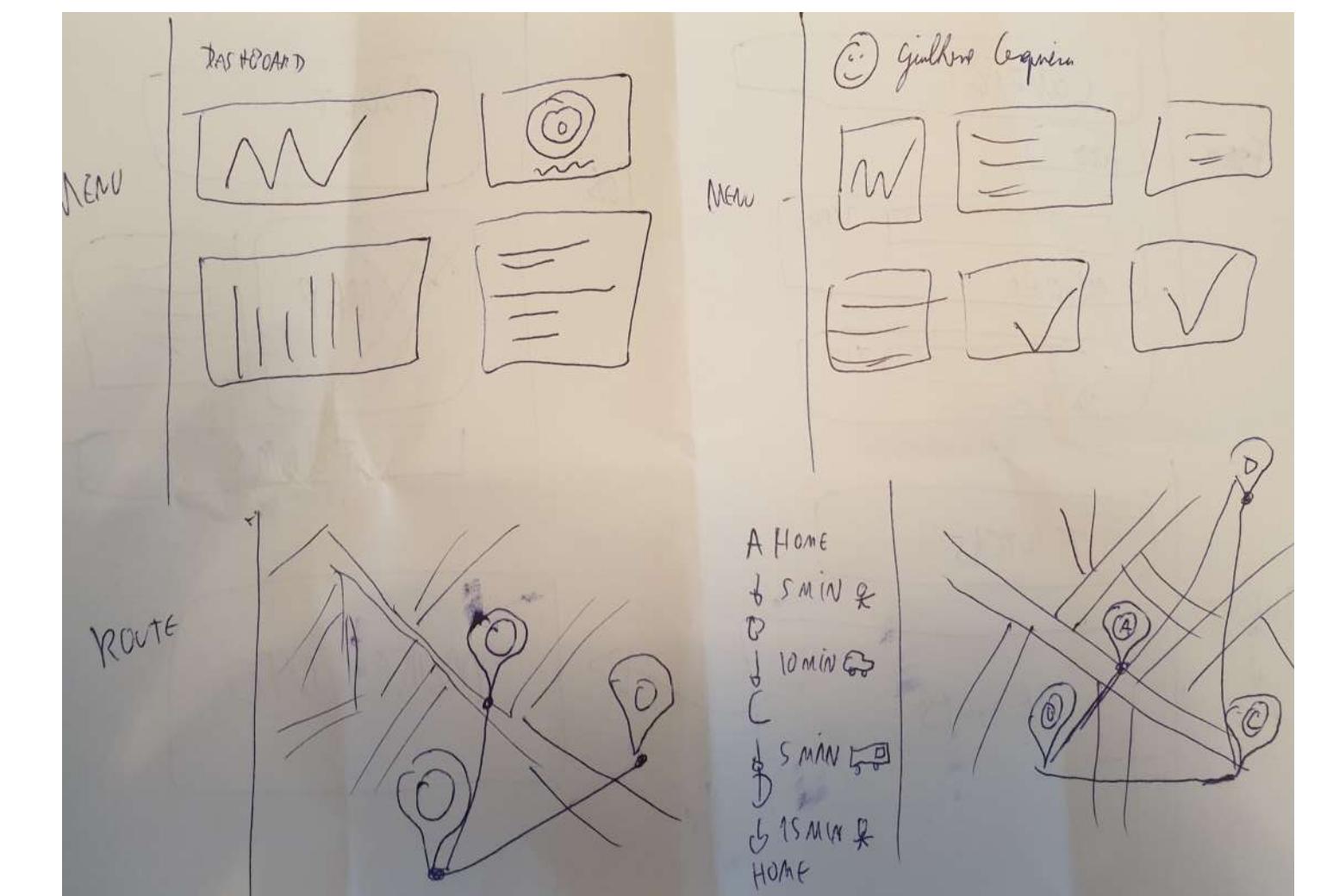
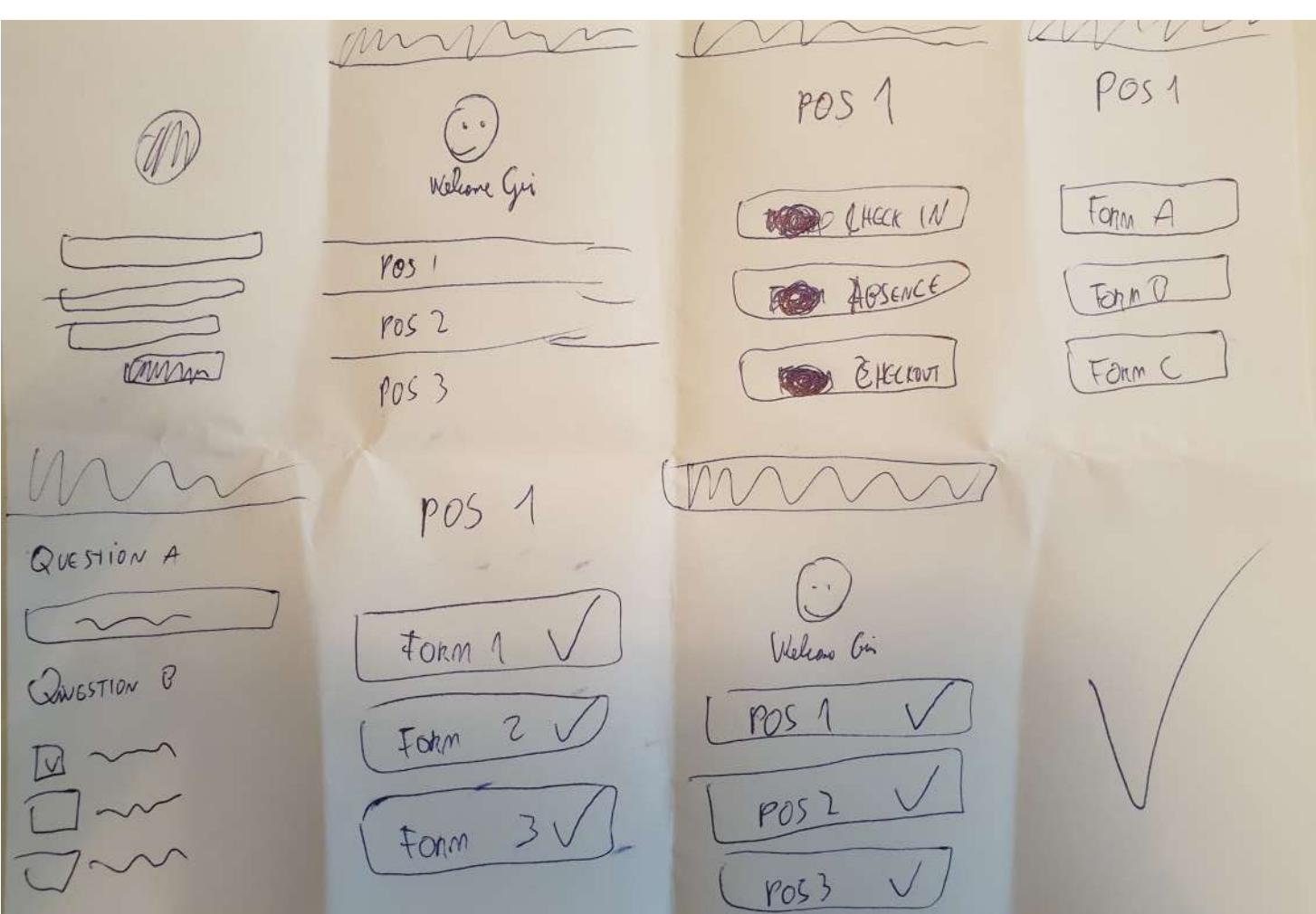
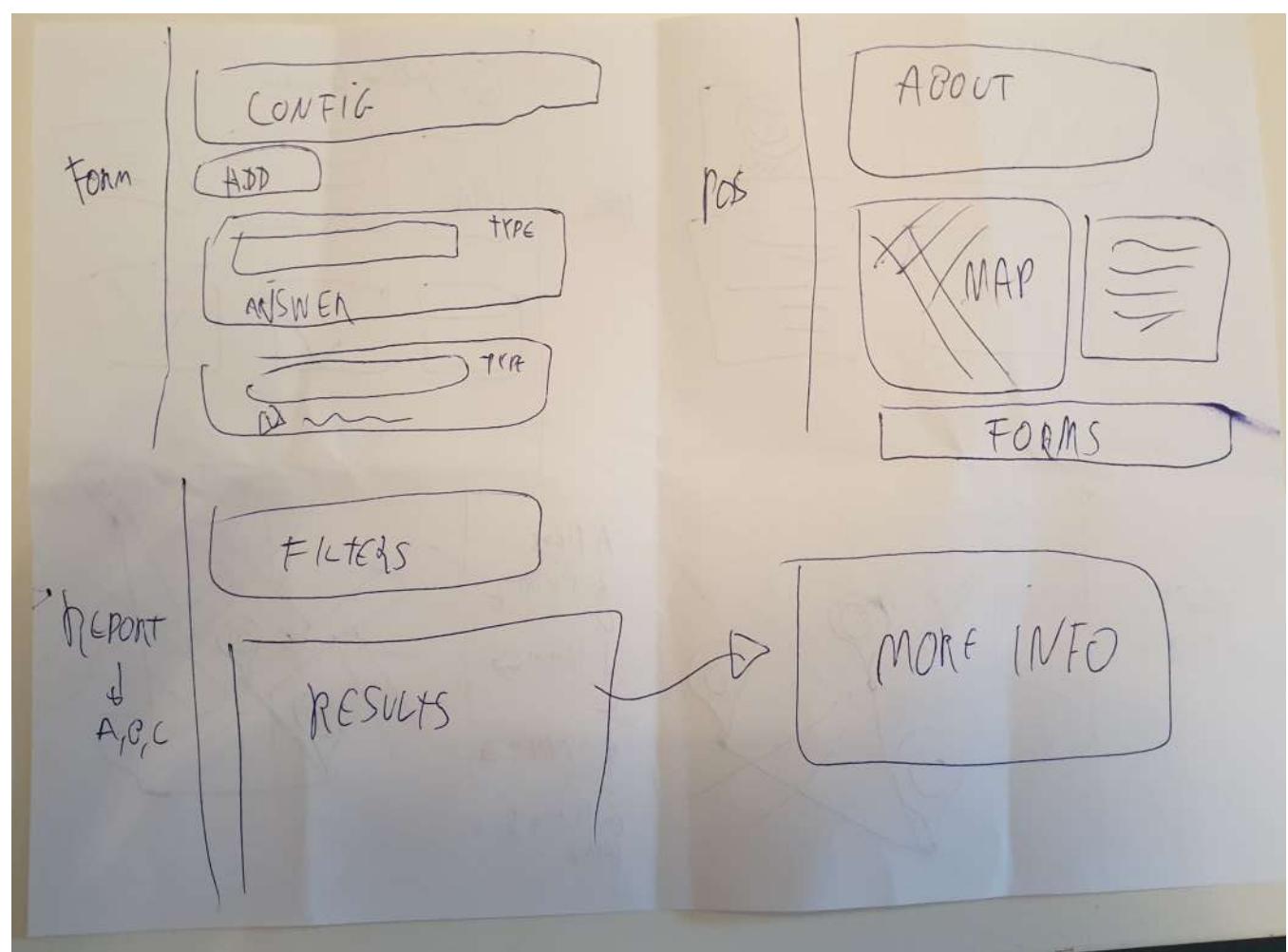




Quick mockups

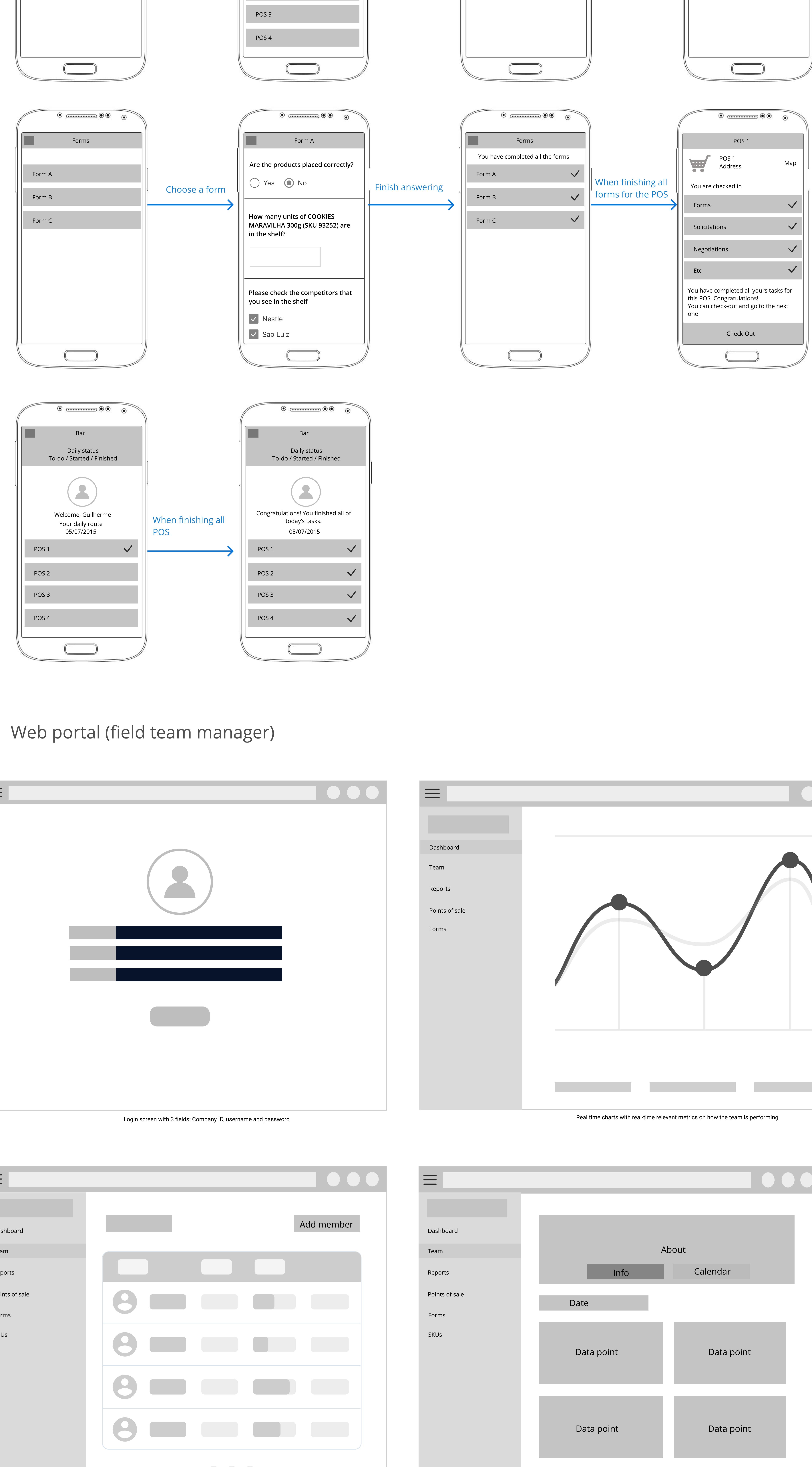
In order to get a basic concept of how the app and web portal would work in user interface form, I also sketched many quick and dirty mockups on pen and paper to get ideas and interface concepts and validate ideas with stakeholders. I also did some crazy 8's to explore more ideas quickly.

It helps me visualize beforehand how figure out a design direction to follow.

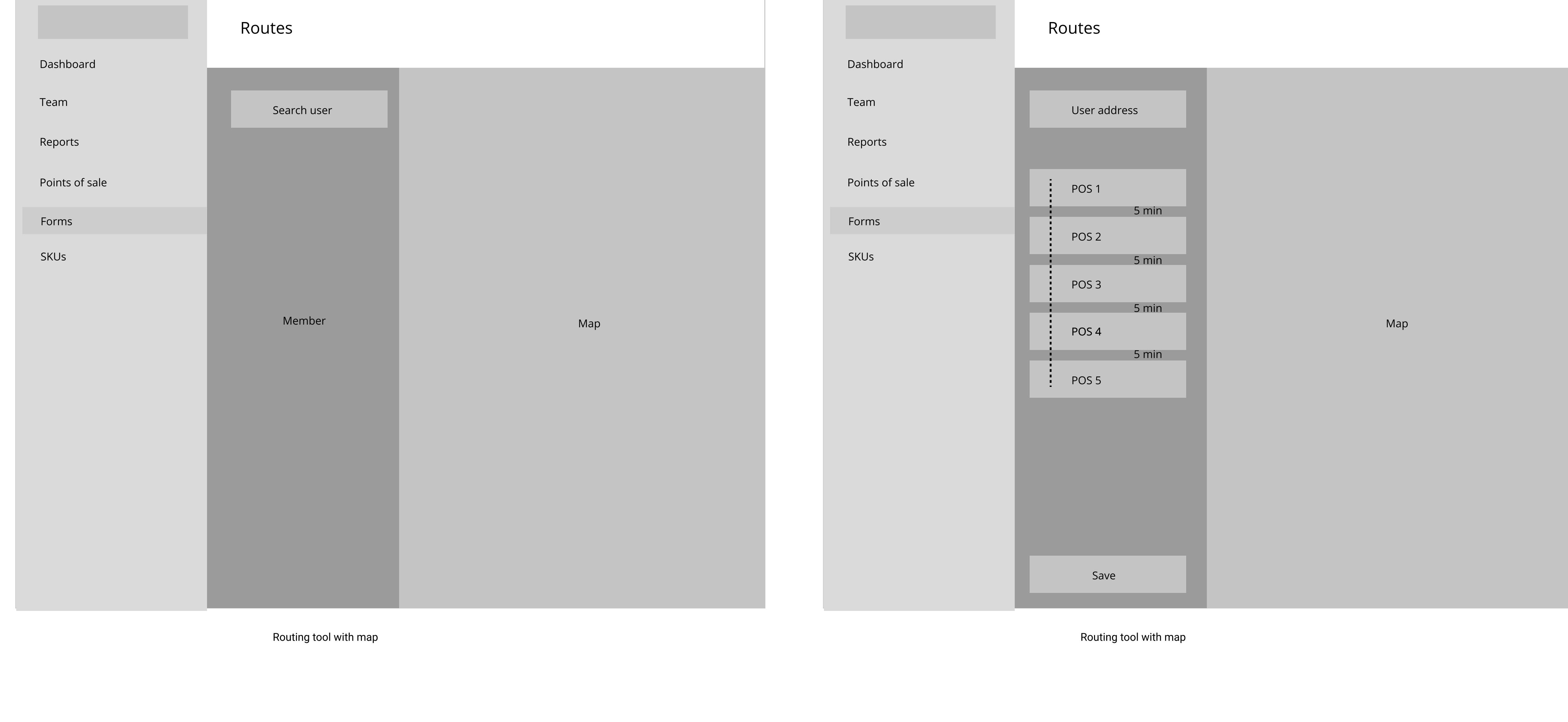
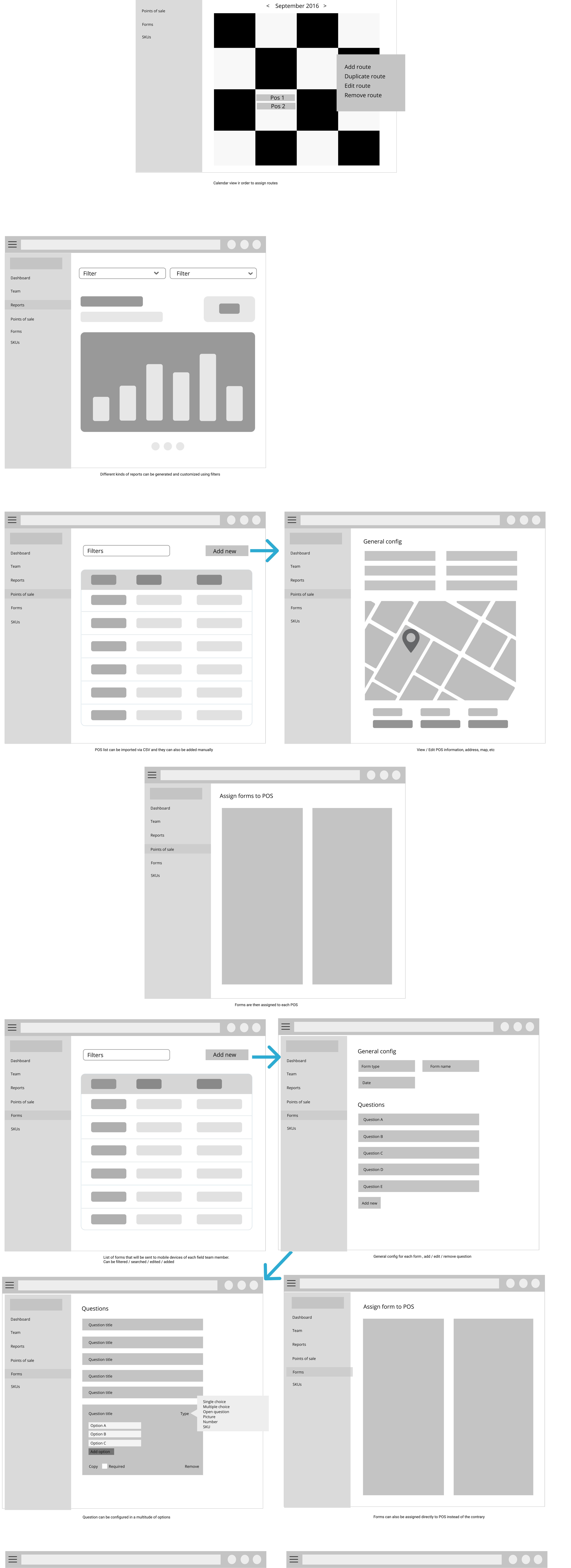


Wireframes

Mobile app (field team member)



Web portal (field team manager)



UI style guide

In order to keep consistency between all platforms of the product and create a cohesive design that reflects a common visual language, I set up a style guide before jumping into the prototyping.

LOGO



COLORS

1. Primary

- 1. Blue #007EF3
- 2. Turquoise #00ABD1
- 3. Green #00AA79
- 4. Black #000000
- 5. White #FFFFFF

2. Secondary

- 1. Blue dark 500 #0067C7
- 2. Blue clear 400 #3CA1FF
- 4. Blue sparkly 200 #DFF0FF
- 5. Blue sparkly 100 #EFF7FF
- 6. Green clear 400 #21DAA4
- 7. Green clear 300 #A3F1D
- 8. Green sparkly 100 #E3FFF7
- 9. Red 400 #EF0021
- 10. Orange 400 #FF960F
- 11. Grey 50 #007EF3
- 12. Grey 300 #FFFFFF
- 13. Grey 700 #000000

TYPHOGRAPHY

BODY • ROBOTO (15 PX)

X • ROBOTO

EXAMPLES

X1 Text

Trade Force

X2 Text

Trade Force

X3 Text

Trade Force

X4 Text

Trade Force

X5 Text

Trade Force

X6 Text

Trade Force

X7 Text

Trade Force

X8 Text

Trade Force

X9 Text

Trade Force

Trade Force

Trade Force

Trade Force

Trade Force

Trade Force

SPACING

| |
|------|
| 2px |
| 4px |
| 8px |
| 16px |
| 24px |
| 32px |
| 48px |

BUTTONS AND FORM INPUTS

ACTIVE

Trade Force

HOVER

Trade Force

DISABLED

Trade Force



Trade Force

Trade Force

Trade Force



Trade Force

Trade Force

Trade Force

Trade Force



MVP Prototyping

After validating the wireframes with stakeholders and users, and taking into consideration deadlines and resources, I prototyped the MVP and the development began at the same time.

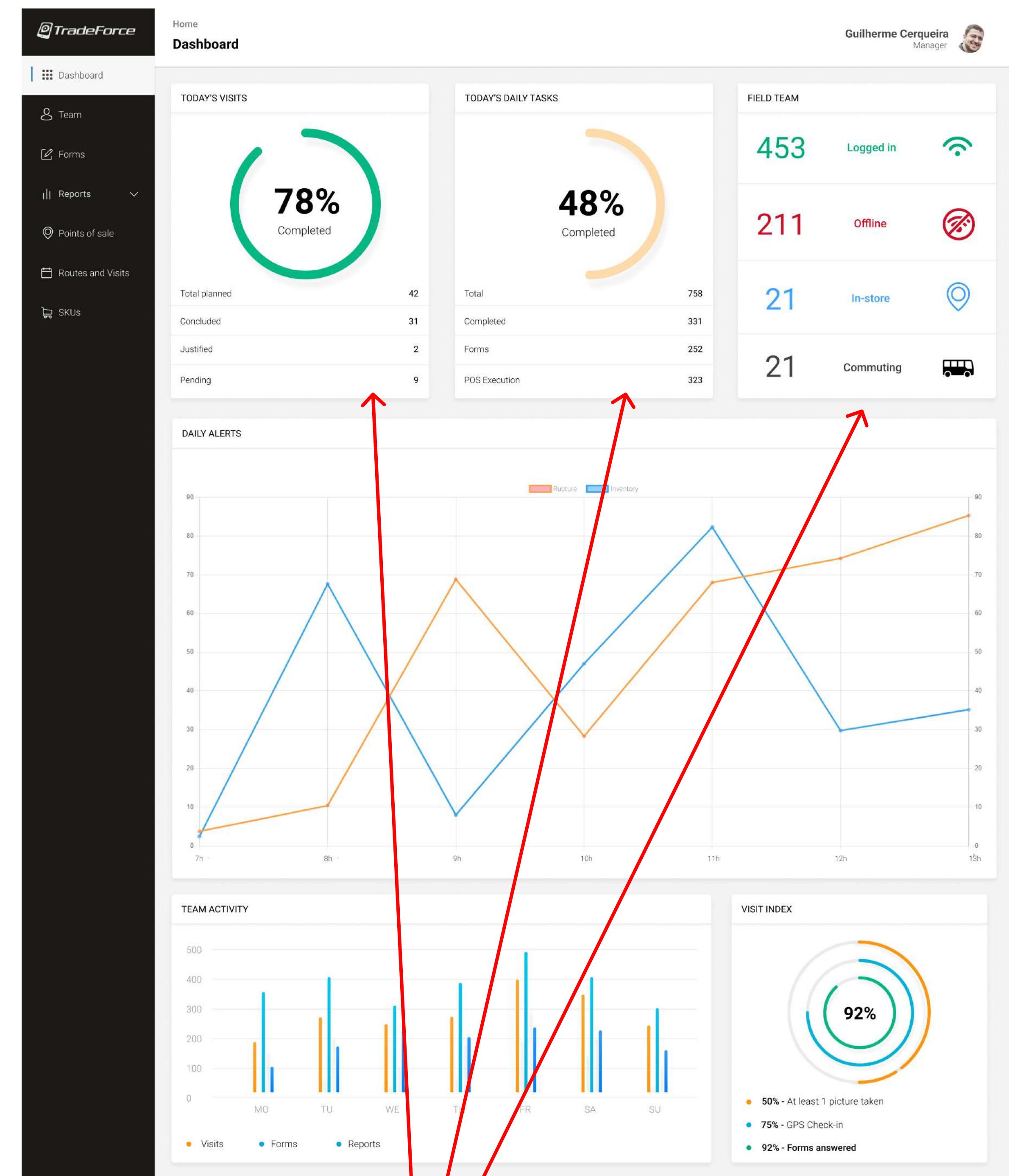
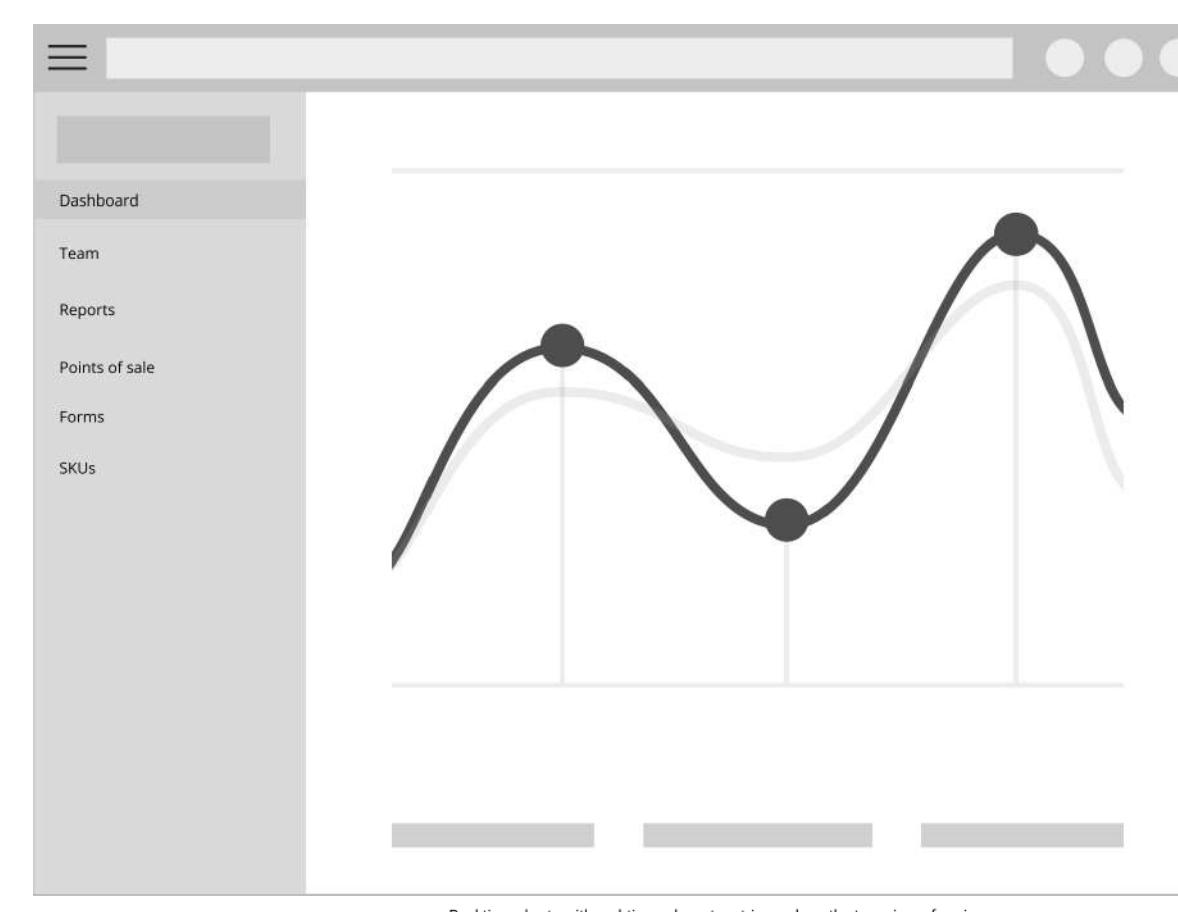
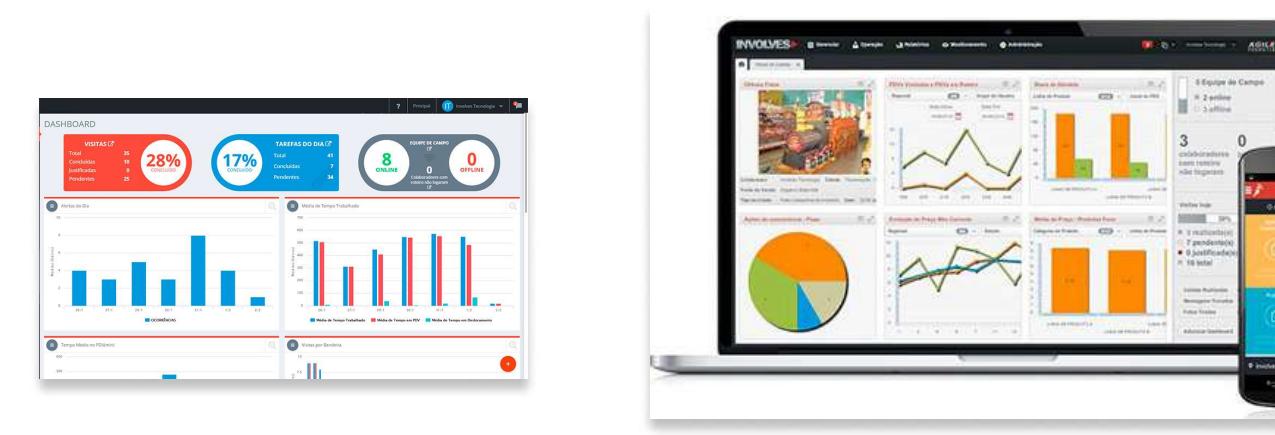
As people started using the solution, I could start using the Lean UX approach to collect constant feedback and make improvements.

Dashboard

A dashboard that gives the user a high level view of the main real-time metrics. Those metrics were validated by interviews with clients and stakeholders.

Field team managers can check in real-time how the team is performing, how many visits and tasks are concluded, how many are pending, the overall status of the team, and others.

The design concept is based on the competitor analysis mentioned previously and visual concepts from other admin dashboards found for inspiration, using the main metrics and charts to illustrate the dashboard.



Arranging content based on defined and consistent cards and columns allows for more content to be shown on-screen while preserving legibility, as well as enabling the portal to be responsive to different browser sizes



My team

Section dedicated to everything related to the field team members, from registering their data like home address and phone to their personal dashboard and route planning.

As the user accesses the team section, there is a list of all their team members and their main information like role, home address, phone and last login.

From there, they can access each member's personal dashboard with their performance by clicking on their name. They can also add new members or import a pre-existent .CSV file if they want to register their members in a bulk.

Table view allows users to scan, analyze, compare, sort and interact with information

By clicking on a team member, users can access the team member's dashboard.

A research was done with a survey asking 10 merchandising managers which metrics they considered the most important to evaluate the performance of their team member and the answers were almost unanimous, so I was confident to put them on the dashboard.

Managers also have the possibility to check the performance for any past date, not just real-time information.

Content-specific tabs to separate context and avoid intensive scrolling in only one screen, while improving navigation logic

Managers have also access to their team member's route calendar, where they can set up pre-made routes for each day.

Design was inspired on Google's Calendar, where the user can easily click on a given day, make the route recurrent, duplicate, edit, remove route, etc.

When they set up the routes, it becomes easy for them to have a overview of the member's calendar and POS that they have to visit.

Routes are shown in a linear/timeline fashion, making it easier to the user understand it



Reports

In this section, the managers can extract customized reports about their field team visits.

There are filtering options so they can fine-tune their search.

They can see the details of the report by clicking in each table row. In this example, the manager can check the answers for a form at a given day in a given POS.

They also have the possibility of exporting the data in .xls and .csv files - users mentioned various times in interviews that they also want to have the possibility to manage the data for themselves in excel sheets or import in other apps

The screenshot shows the 'Report - Execution' page. At the top right is a user profile for 'Guilherme Cerqueira Manager'. The main area has a 'FILTERS' section with dropdowns for 'Report type' (Form), 'Date range' (10/08/2016 - 12/08/2016), 'Team member' (Carlos Cesar), 'State' (Sao Paulo), and 'City' (Sao Paulo). Below this is a table titled 'EXECUTION' with columns: POS, Brand, City, State, Date, and Executed by. The table lists six entries for PAO DE ACUCAR VILA NOVA, all executed by Carlos Cesar on 25/08/2016.

Initially, a proposal to have the report details inside a modal was made.

But, after testing with 5 users and imagining scenarios where the forms are bigger and more actions can be done, I found myself adding a lot of content within a modal window, which is not ideal. There could also be cases where a scroll would be necessary, and that is not a good practice for modal windows, where the number of actions and information should be limited.

So it was time to stop and rethink my approach.

A regular page with all this info could work much better.

It also keeps consistency within all other pages in the app.

The modal window displays a 'Product research' section with the following questions and answers:

- Question: How many unities of SHAMPOO VAZ 350ml are on the shelf? Answer: 4
- Question: Please take a picture of the shelf as it is now. Answer: A small image of a shelf with various products.
- Question: Which products are missing on the shelf? Answer: SHAMPOO CONDICIONADOR A21, TOOTHPASTE KOLYNOS MASTER
- Question: Did the phantom inventory have the same number as the actual inventory? Answer: No

At the bottom are 'Export.xls file' and 'Export.CSV file' buttons.



This screenshot shows the same 'Report - Execution' page as before, but the 'Product research' section is now part of the main page content, integrated into the table rows. The layout is cleaner and more consistent with the rest of the application.



Points of sale

This page features a database of all the points of sale in which the client/company has operations. They have information that enable them to be shown on maps, forms and routes.

Users can add new POS manually, but Trade Force is able to provide them a big database of POS, based on the locations of the operations and business size, so they don't have to do this manual work themselves.

Also, usually some companies already have a .csv file with all the POS in which they operate, so this makes the work even easier by importing the .CSV file

The table view also makes it easy to display all the relevant information, such as address, brand, number of forms and last visits, which proved helpful to the users to find out whether there's been some time that a given POS hasn't been visited.

Keeping it consistent with other pages that have the same table-view and intent

| Name | Brand | Address | # Forms | Last visited |
|---------------------------------|-----------|---|---------|--------------|
| CARREFOUR PAMPLONA 201 | CARREFOUR | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | Yesterday > |
| PAO DE ACUCAR ABILIO SOARES 352 | PDA | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | Today > |
| DIA POMPEIA SUMARE 53252 | DIA | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | 2 days ago > |
| EXTRA HIPERMERCADO | EXTRA | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | 5 days ago > |
| CARREFOUR PAMPLONA 201 | CARREFOUR | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | Yesterday > |
| PAO DE ACUCAR ABILIO SOARES 352 | PDA | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | Yesterday > |
| DIA POMPEIA SUMARE 53252 | EXTRA | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | Today > |
| EXTRA HIPERMERCADO | EXTRA | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | 4 days ago > |
| DIA POMPEIA SUMARE 53252 | DIA | AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000 | 45 | 14/10/2018 > |

Show 10 results per page < Previous 1 2 3 4 5 6 7 8 Next >

Inside each POS dashboard, users find more detailed information such as map, last visits and visit story.

CARREFOUR PAMPLONA 201

GENERAL INFORMATION

- Name: CARREFOUR PAMPLONA 201
- Brand: CARREFOUR
- Store ID: 201
- Address: AV. PAMPLONA, 341 - JARDINS/SP CEP: 01426-000

VISITS

| Month | Visits |
|--------|--------|
| Aug 17 | ~20 |
| Sep 17 | ~30 |
| Oct 17 | ~150 |
| Nov 17 | ~10 |
| Dec 17 | ~10 |
| Jan 18 | ~10 |
| Feb 18 | ~200 |

VISIT HISTORY

| User | Date | Store time |
|--------------|------------|------------|
| Carlos Cesar | 21/07/2016 | 1h05m |
| Carlos Cesar | 15/07/2016 | 1h12m |
| Carlos Cesar | 13/07/2016 | 1h06m |
| Carlos Cesar | 11/07/2016 | 1h03m |

FORMS

Available forms

- Rupture
- Form
- Execution
- Competition

| Form Type | Action |
|------------------------------------|---------|
| Rupture Research Cleaning Products | Rupture |
| Extra Merchant Point Pictures | Rupture |
| Inventory Research | Rupture |
| Action Merchandising Holiday | Form |
| Product Count | Form |
| Merchandising Extra Point | Form |
| Merchandising Taste | Form |
| Merchandising Yogurt | Form |
| Merchandising for Carrefour | Form |
| Merchandising for Extra | Form |
| Merchandising for Carrefour | Form |

Selected forms

| Form | Action |
|--------------------------------------|---------|
| RUPERTURE RESEARCH CLEANING PRODUCTS | Rupture |
| EXTRA MERCHANT POINT PICTURES | Rupture |
| INVENTORY RESEARCH | Rupture |
| ACTION MERCHANDISING HOLIDAY | Form |
| PRODUCT COUNT | Form |
| MERCHANDISING EXTRA POINT | Form |
| MERCHANDISING TASTE | Form |
| MERCHANDISING YOGURT | Form |
| MERCHANDISING FOR CARREFOUR | Form |

Users can also assign previously created forms to the POS, which will appear in the mobile app for the field team members to execute.

They can filter the forms by type and name to assign/unassign them from this POS.

The list can be really long, so a few filters and a auto-complete search box helps the user to find the forms easily and see clearly which ones were selected. They can just click in a form and it will be assigned on the right column, where they can be removed as well.

Form creator

In this section, users can view, create and edit forms for the field team members to answer in their planned POS visits.

The screenshot shows a list of forms under the 'Forms' tab. The columns include Title, Type, Tab, # Questions, and Start date. The forms listed are: RUPTURE RESEARCH CLEANING PRODUCTS (Rupture, Product research, 5, 22/08/2016), RUPTURE RESEARCH CLEANING PRODUCTS (Rupture, Product research, 12, 22/08/2016), RUPTURE RESEARCH CLEANING PRODUCTS (Rupture, Product research, 3, 22/08/2016), RUPTURE RESEARCH CLEANING PRODUCTS (Rupture, Product research, 65, 22/08/2016), RUPTURE RESEARCH CLEANING PRODUCTS (Rupture, Product research, 12, 22/08/2016), MERCHANTISING EXTRA POINT (Form, Competition, 32, 22/08/2016), MERCHANTISING FOR EXTRA (Form, Competition, 12, 22/08/2016), MERCHANTISING FOR PAO DE ACUCAR (Form, Competition, 53, 22/08/2016), MERCHANTISING FOR CARREFOUR (Form, Competition, 1, 22/08/2016), EXTRA MATERIAL CARREFOUR (Solicitations, Extra point, 23, 22/08/2016), EXTRA MATERIAL PDA (Solicitations, Extra point, 12, 22/08/2016), EXTRA MATERIAL FOR LAUNCHING (Solicitations, Extra point, 32, 22/08/2016), EXTRA SPACE FOR PRODUCTS (Solicitations, Extra point, 36, 22/08/2016), MORE SPACE ON THE SHELF (Negotiations, Extra point, 32, 22/08/2016), and EXTRA POINT AT CASHIER (Negotiations, Extra point, 11, 22/08/2016). A search bar at the top right allows users to search for forms.

First, the user selects one of the types of form in the dropdown (which is only for organize it inside the app) and the tab.

For the MVP, the Types and the Tabs were already provided based on the most common form executions in the market.

User can also select a date range for a seasonal research, for example.

The screenshot shows the 'Create new form' interface. It includes sections for 'GENERAL INFORMATION' (Type: Execution, Tab: Product research, Name: [empty], Start date: [empty]), 'Questions' (Question title: 'Describe the shelf', Question type: Plain input, Required: Yes), and multiple question entries. One entry has 'Ground display' checked. Red arrows point from the left margin to the 'Required' field and the 'Add new question' button.

The button placement in this screen is different for the rest of the system for a reason: in the first version, in which the buttons were placed on the top like the rest of the screens, users took time to find the save button and had to scroll all the way up. The right menu is fixed on the screen even if the user scrolls down when creating a longer form, so the user always have the option to add a new question at hand, and also to save the form.

There's also a possibility of assigning products (pre-registered SKUs) for each question, so the users can extract bulk information of a particular product in a report.

The screenshot shows a modal dialog for assigning products to a question. It lists products: 'ASSOCIATE PRODUCT' (Shampoo Seda Cé), 'SHAMPOO SEDA CERAMIDAS' (SKU 8952392), 'SHAMPOO SEDA CERAMIDAS MINI' (SKU 5632352), and 'Please take a picture of the shelf'. Red arrows point from the left margin to the product list and the 'Assign to POS' button.

Finally, the users can also do the reverse: Assign multiple POS to this form, instead of assigning multiple forms to a POS. This came from a need of the users of having the possibility of creating unique forms that apply only for a particular store.

This design also makes it easier to check which POS have this form assigned to them, instead of having to search for them in each store.

Similar UX as the reverse POS-to-Form association. The boxes are bigger here and there are more filters as well because it can be easy to confuse the POS that are from the same brand, so the address must also be shown.

The screenshot shows the 'Assign to POS' interface. It includes a 'Currently assigned to' section with a 'Filter POS...' search bar and a list of assigned POSes: 'EXTRA TOTAL 123' (Av. Pamplona, 341 - Vila Nova, São Paulo / SP - 329523-2523), 'DIA ATACADO JARDINS' (Av. Pamplona, 341 - Vila Nova, São Paulo / SP - 329523-2523), 'CARREFOUR BRIGADEIRO' (Av. Pamplona, 341 - Vila Nova, São Paulo / SP - 329523-2523), 'CARREFOUR PAMPLONA' (Av. Pamplona, 341 - Vila Nova, São Paulo / SP - 329523-2523), and 'PAO DE ACUCAR HIGIENOPOLIS' (Av. Pamplona, 341 - Vila Nova, São Paulo / SP - 329523-2523). A red arrow points from the left margin to the 'Assign to POS' button.



Route creator

In this section, managers can set up and manage routes for the team members. This goal of this feature is to make it easy to find and assign POS for team members to visit based on their home address, so they have the smallest commuting time and have a logical route to follow every day.

When interviewing users, I found out that they were very used to Google maps, so I tried to design something that was familiar to them. I tried to make it with as few steps as possible, according to the user flow mentioned before

The map is very important in this part of the process, so more horizontal space of the page was used, just like Google maps

1 - Search and select a member

2 - After selecting a member, the manager can choose to create a new route or manage the existing ones. This example shows the flow for the creation of a new route. Main action is to add the first POS and continue from there.

3 - Clicking "Add POS" opens a list of POS based on a selected maximum radius from the field team member's house. The POS are shown on map and in the list.

4 - When adding the POS, the color of the pin on the map turns blue, with the order of the visits shown inside the pin as well. The left column shows how the route is and the time between one place to another. Users can also change the order of the visits by clicking and dragging each POS on the left list, and the system updates and calculates the route automatically.

5 - Finally, they can see all the created routes for the user here, and have the possibility to duplicate, edit and remove them. These are the routes used in the calendar for planning the visits.



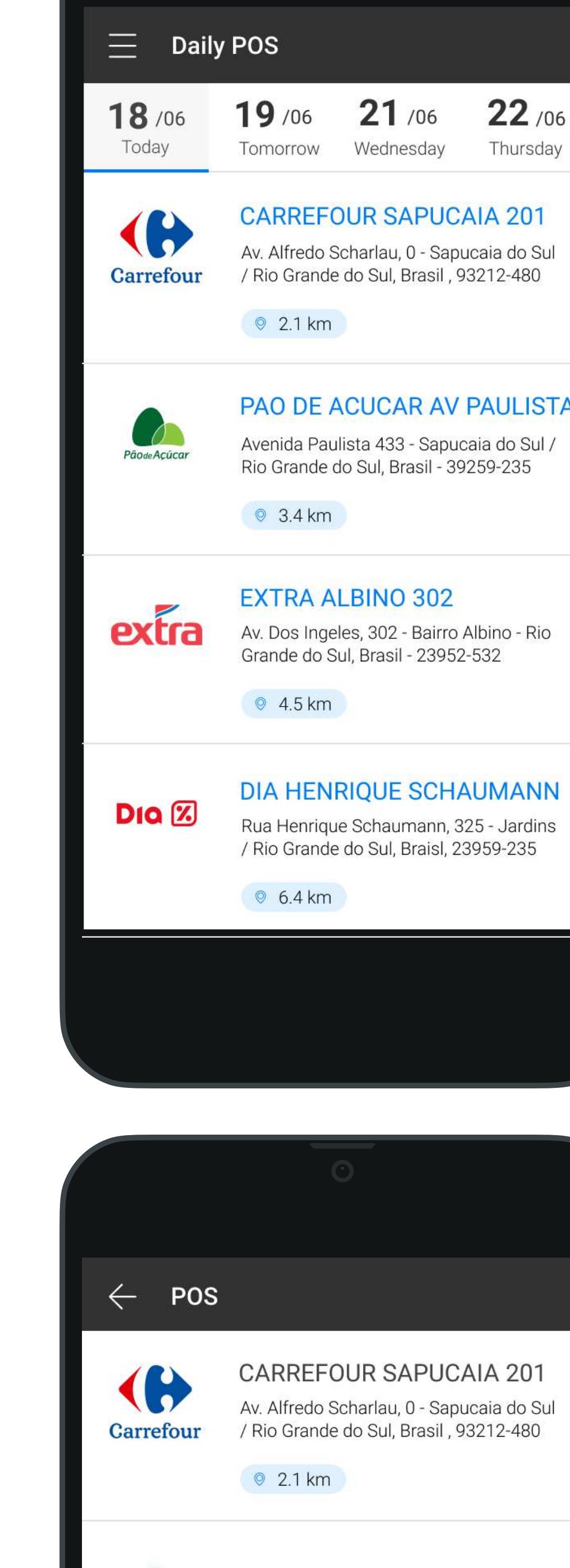
Mobile app

The mobile app is where the field team members execute the tasks and routes defined by their managers in the web app.

Login screen

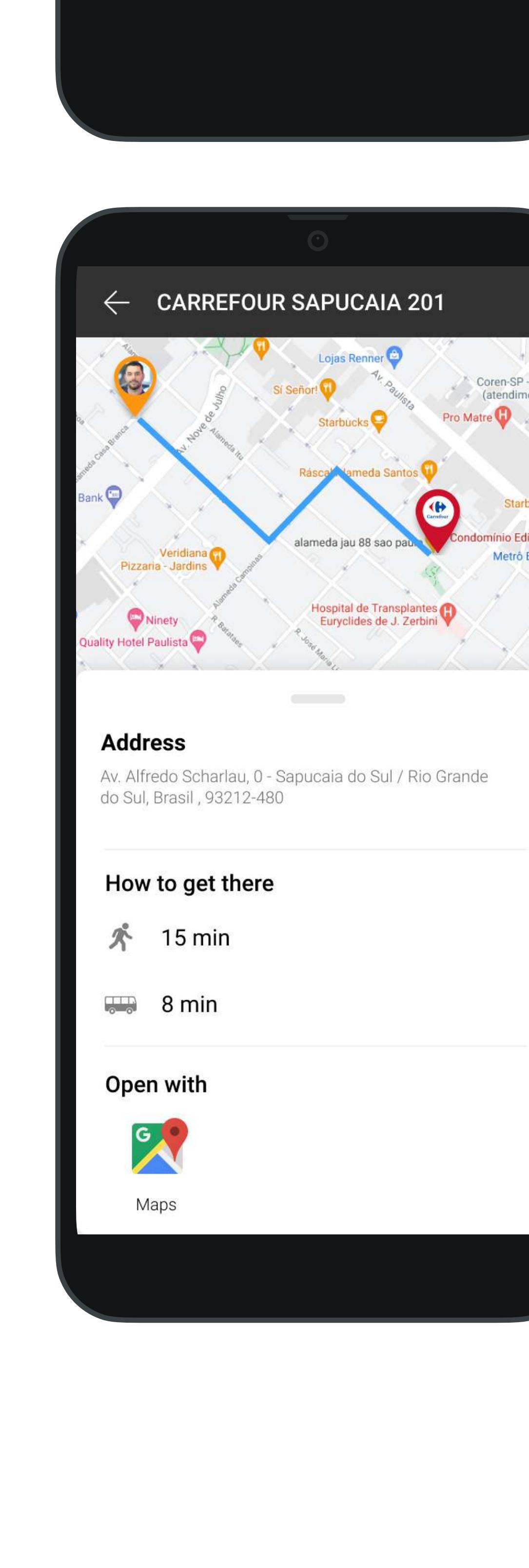


It takes a little while for the app to download all the needed information, routes and calculation, (sometimes more than 15 seconds) so I designed a progress indicator for setting the user expectations and waiting time.

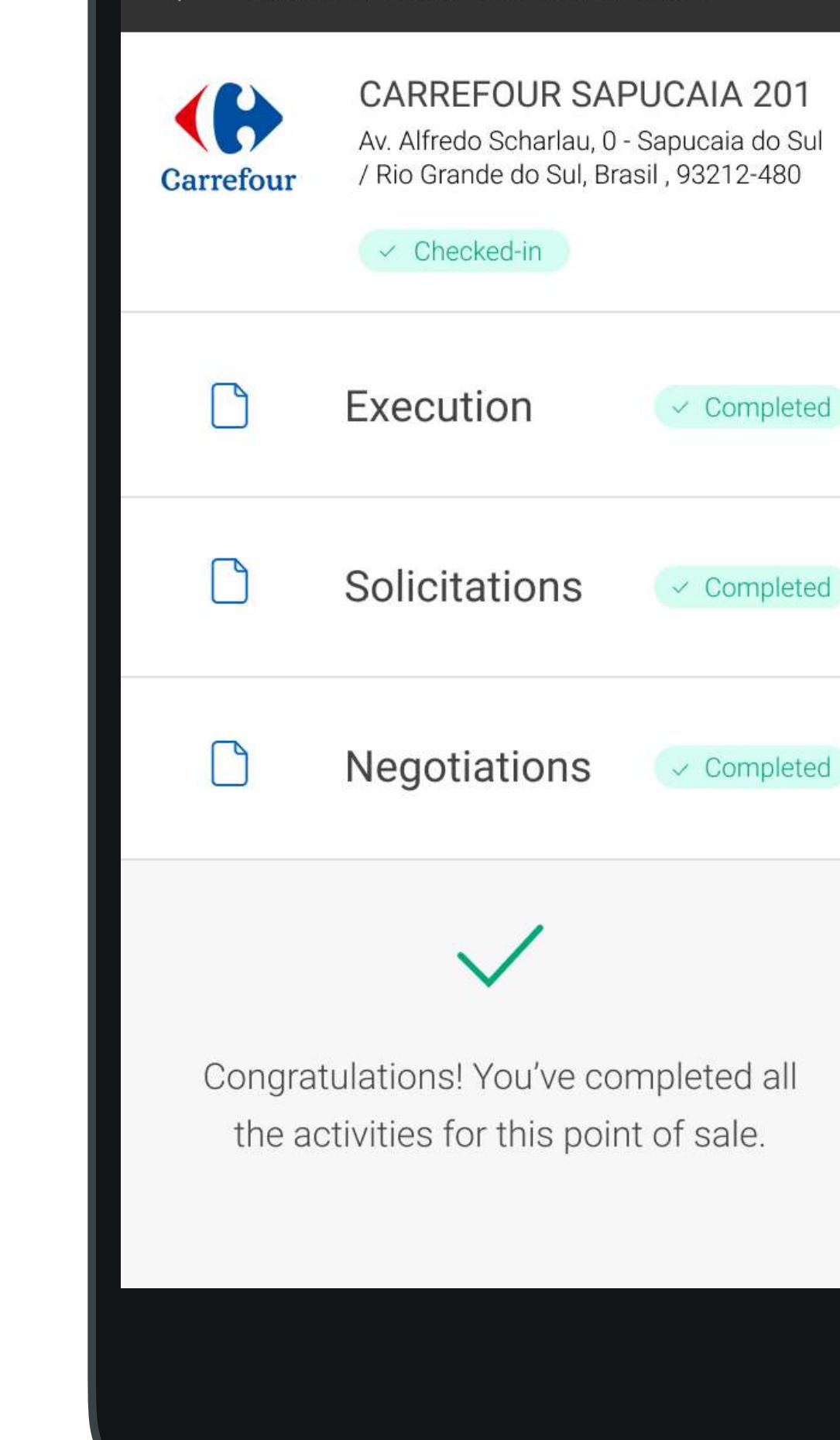


Then, the user will see their POS visits route for the day. They can also check the next four future routes, so they can plan their day beforehand.

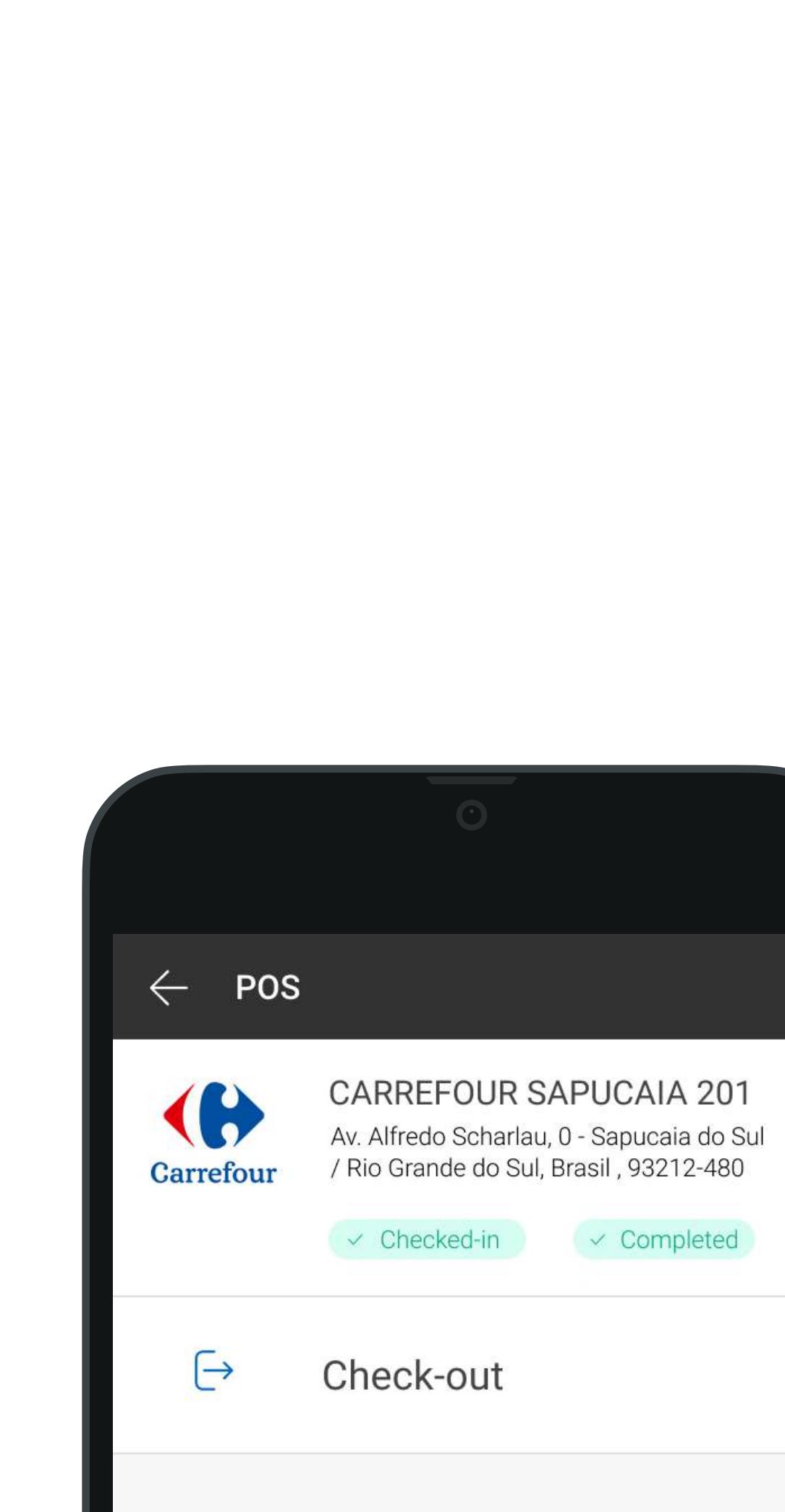
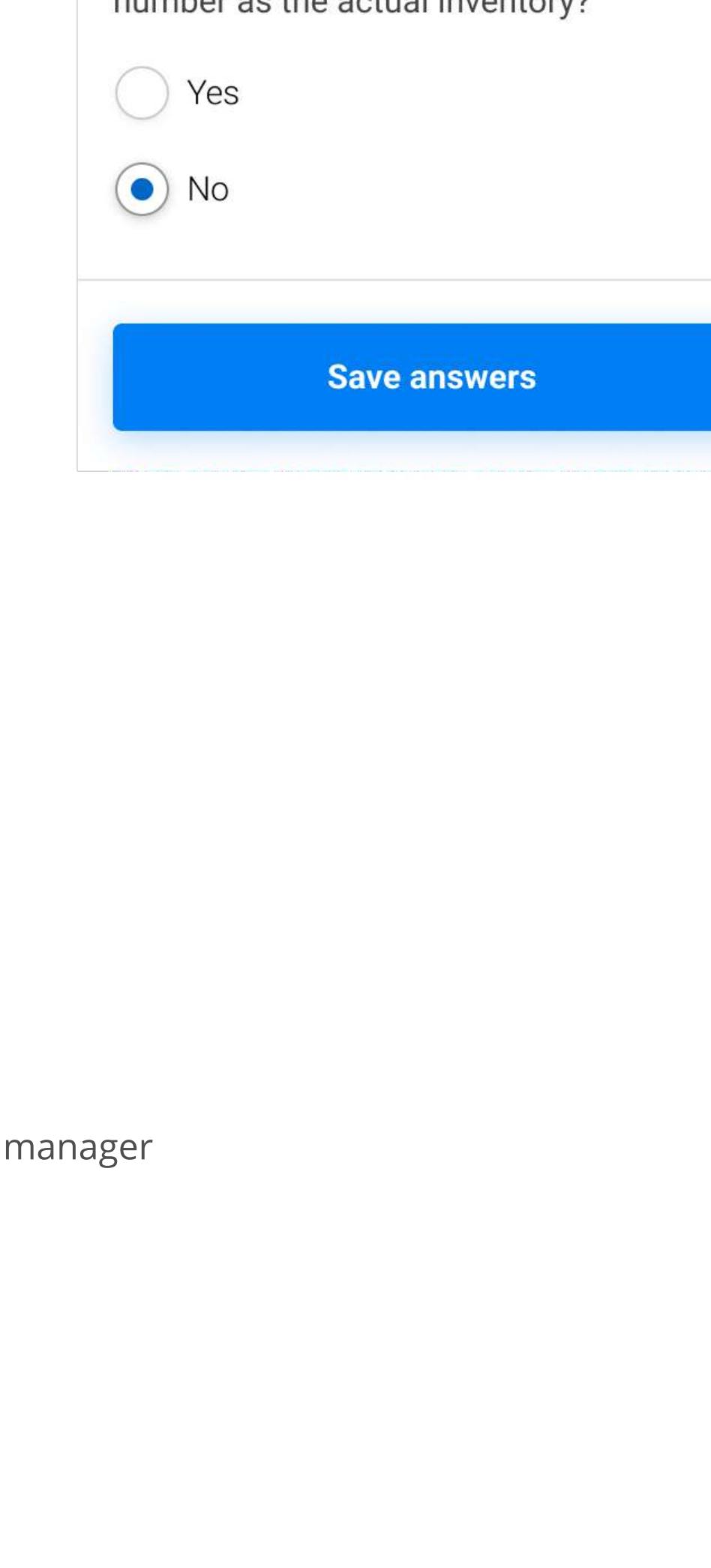
The POS are organized in a linear way that was planned on their route by their manager, but they can execute all of them in any order they want (sometimes unpredictabilities can happen and they are closer to other POS than the next one)



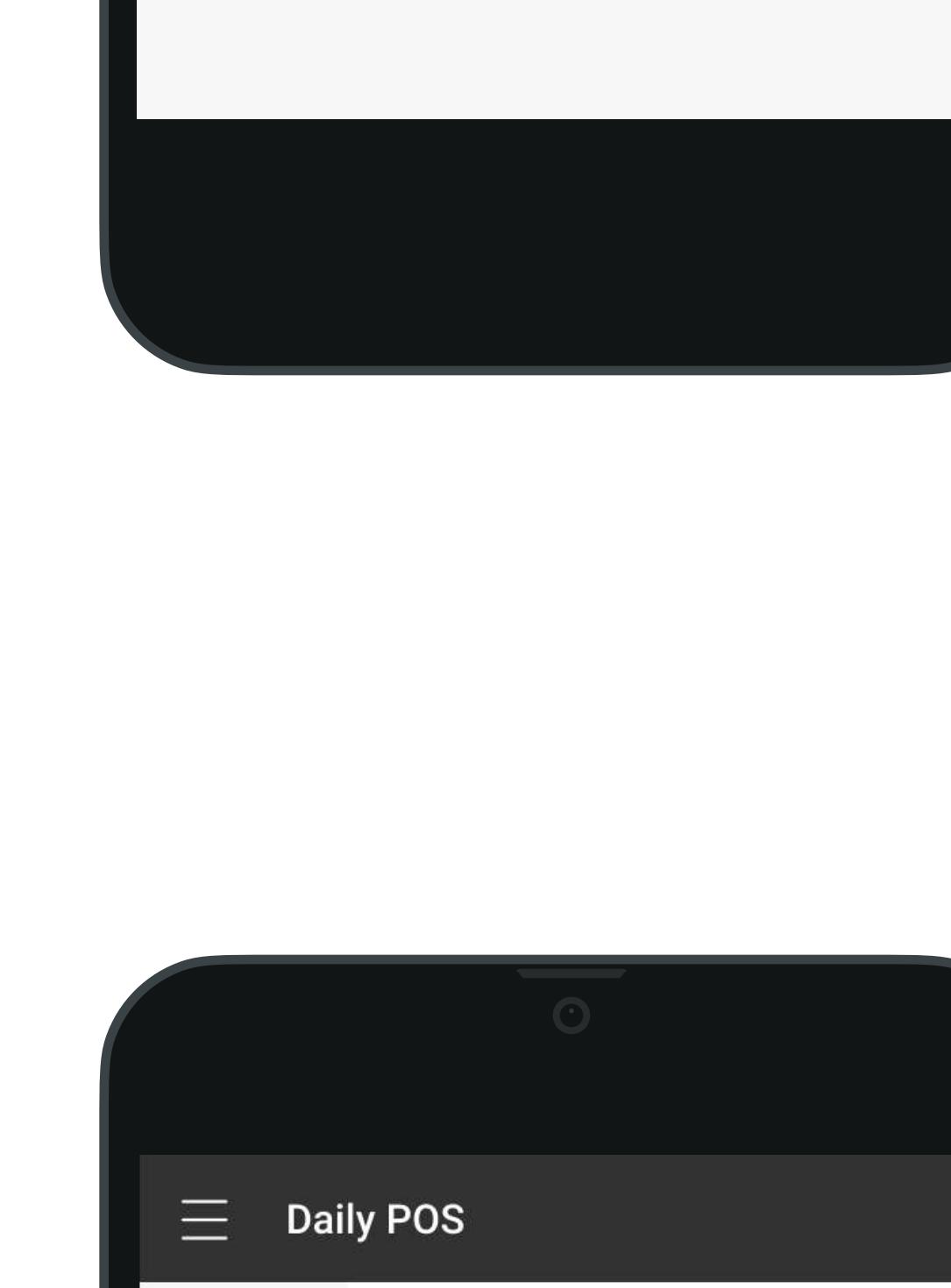
After clicking in a POS, they can check-in, justify their absence and check how to get there.



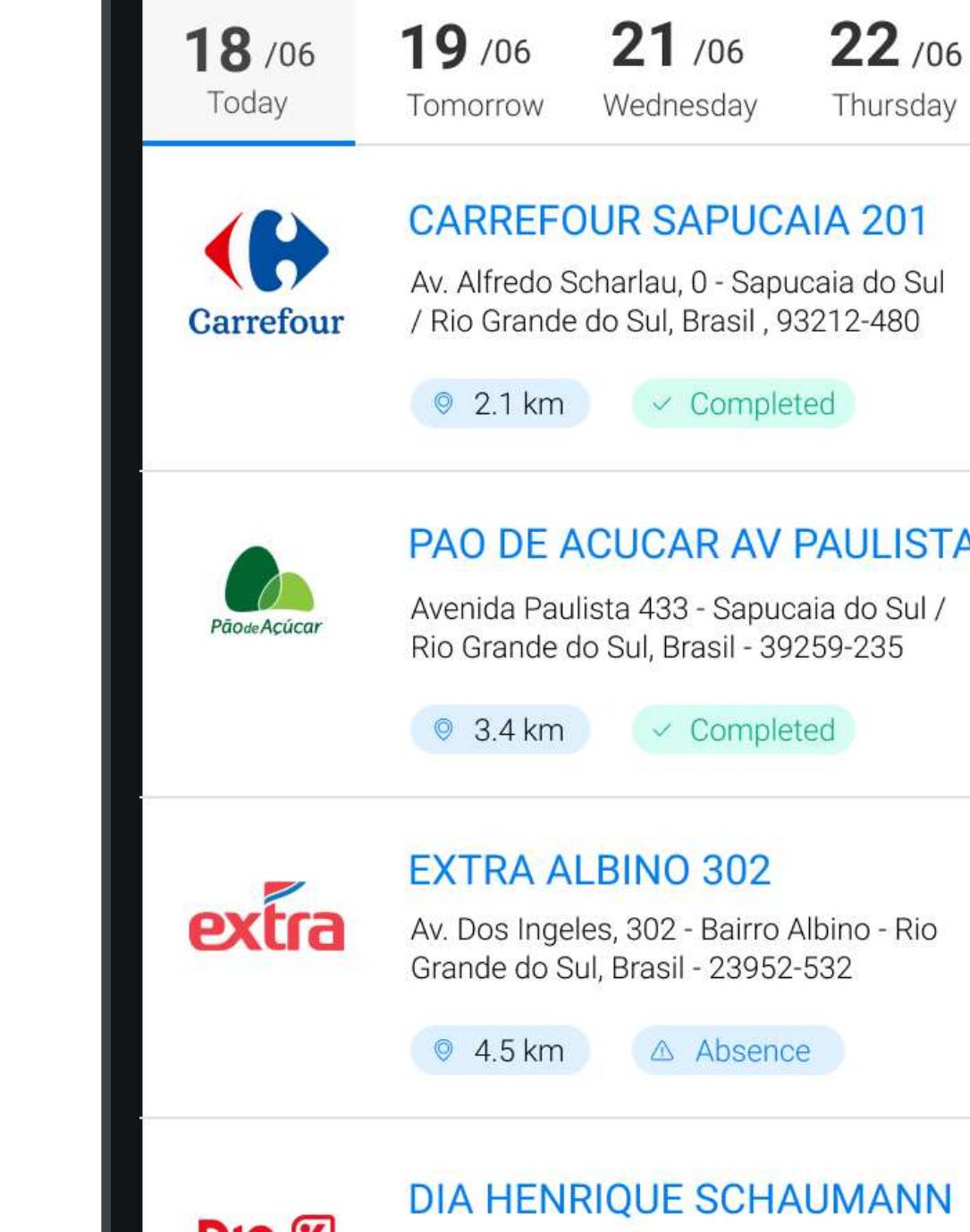
Route suggestion shows the route on the map, ways to get there and the possibility to open the route with Google maps for more details.



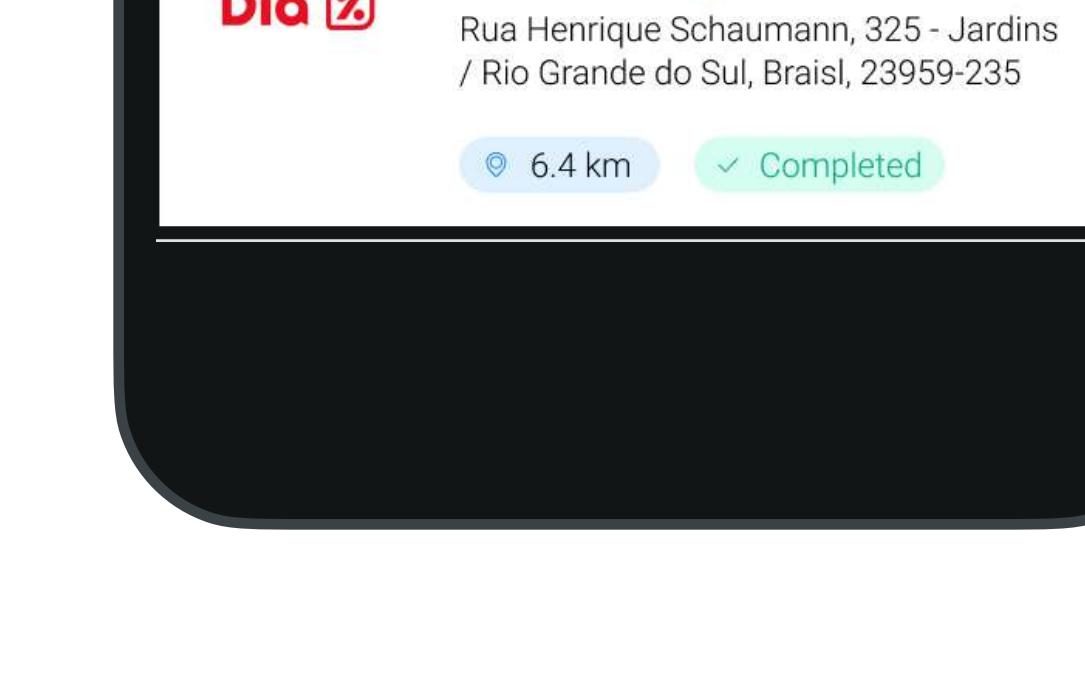
After checking-in, user will see the list of tasks and forms to complete. The system indicates the status of each form and how many are completed/pending.



After all the forms are completed, user can check-out. This prepares all the data and information to be sent to the manager dashboard.



After all the POS are completed, the user can go home and the manager has all the information collected.





Testing, surveys and feedback

There was no time luxury to test only the prototypes and making improvements before starting the MVP development, so the MVP was launched as it was designed.

As the product started getting more and more clients, I used Hotjar in the web app to collect general usability feedback and surveys to get a grasp on how the users were perceiving the product and what could be improved in their opinion. I also added Google Analytics to understand some quantitative metrics, for example the average time spent in a page / completing a task. This was mainly true for the Web app, as the traffic was not big enough for gaining insights and collecting metrics with quick experimentation and A/B testing.

Overall the result was very satisfactory for a MVP - which proves how important it is to have a good research data / wireframing and stakeholder alignment before designing.

Some information collected with Hotjar surveys.

This approach helped fine-tuning the pages, prioritizing new features and acknowledging which aspects of design is working well or not so it can be iterated accordingly.

| | To which extent you agree with the following statement: "This page is easy to use and I can complete my goals without problems" 1 - 5 | If 1-3 What could be improved to make your experience better | If 4-5 What's the main reason for this score? | Any additional feedback? |
|-------------------|---|--|--|--|
| Dashboard | Average score 3.2 | I'd like to see more metrics I wanted to have filters to fine tune the charts When clicking on the numbers on the right, i'd like to have a list of the team members according to the status | Most important information is there I can see how my team is performing in real time Simple and direct | I'd like to click and drag something around to create more data, add more metrics myself and make the comparisons myself. It would keep me as an incentive to stay on the page |
| Team | Average score 4.4 | A bit slow to load I took a bit of time to understand how the calendar and routing works It was not very clear at first, took me some time to understand but once I did it was fine | Activity panel very complete Information is clear and easy to read Timeline view is great and useful I can change the date and check a report of each member at any given day, I really like this Comprehensible charts Battery chart is great, helps justifying I love the route recurrence feature because i dont need to repeat the routing often | It would be nice to be able to send a message directly to the member using the system I'd like to be able to filter the members in the list by city and state, sometimes it can take some time to find the right person if my team is too big |
| Reports | Average score 3.9 | More types of report Slow to load when the date range is bigger than a month I expected more granularity on the data | I love that I can download the data in a excel file Forms are very clear to read and navigate It solves my problems Its very easy to present the results internally with the tool | I'd love to see report by product or by product types |
| Routes and Visits | Average score 4.3 | Very good but the range selection can be improved, I can't select decimals and the minimum is 1km Some distances are inaccurate Slow to load all the stores | Very easy to use I feel it very similar to Google maps Very intuitive I can create routes very quickly for my team members EASY | I would like to be able to search and add a POS that is outside the radius for special visits and Im not able to do that now |
| Forms | Average score 4.3 | I cannot add pictures to the questions, it makes it hard to explain to the promoters how to properly organize the product on the shelf, I have to send the picture separately | Similar to Google forms I learned fast Easy to create forms I love that you can associate the form to various POS and the reverse, this makes it very easy for many scenarios | I would like to preview the form like it's shown on the app for my team members It would be nice to make conditional questions |
| Points of Sale | Average score 4.2 | It takes some time to load everything I could not find a way to inactivate the POS if we don't sell products there anymore | Very easy to import my list of POS in the system, almost no manual work Dashboard is nice, data is clear with the last visits and who visited it I can easily see and add the forms that the team member will answer when visiting the POS, that's a very nice feature | I'd love to have an alert when a POS is not visited by X number of days |



Design improvements based on user feedback

This "final" design was the result of dozens of iterations and user testing, also updating the design language to revolve around the concepts of flexibility, clarity, and friendliness.

These were achieved through the use of a light and bright colour palette, card-based responsive layout, and a friendly, casual tone-of-voice.

A few examples below:

Addition of new features like chat, messaging, alerts and information brought the need to add a top-level bar with quick shortcuts

Improved table usability by adding sorters

Collapsible filters to minimize information overload and scrolling

Collapsible sidebar allows users to maximize the amount of content visible when needed

Hover-activated tooltips and information panels providing context-relevant information for users without causing information overload

Improved slider usability, now providing a clear range of values for the POS routing and allowing user to type the value in the field if needed



A/B testing

For the mobile app, as the company grew bigger and acquired more clients, we had more traffic to try some improvements using A/B testing.

A few examples:

Hypothesis:

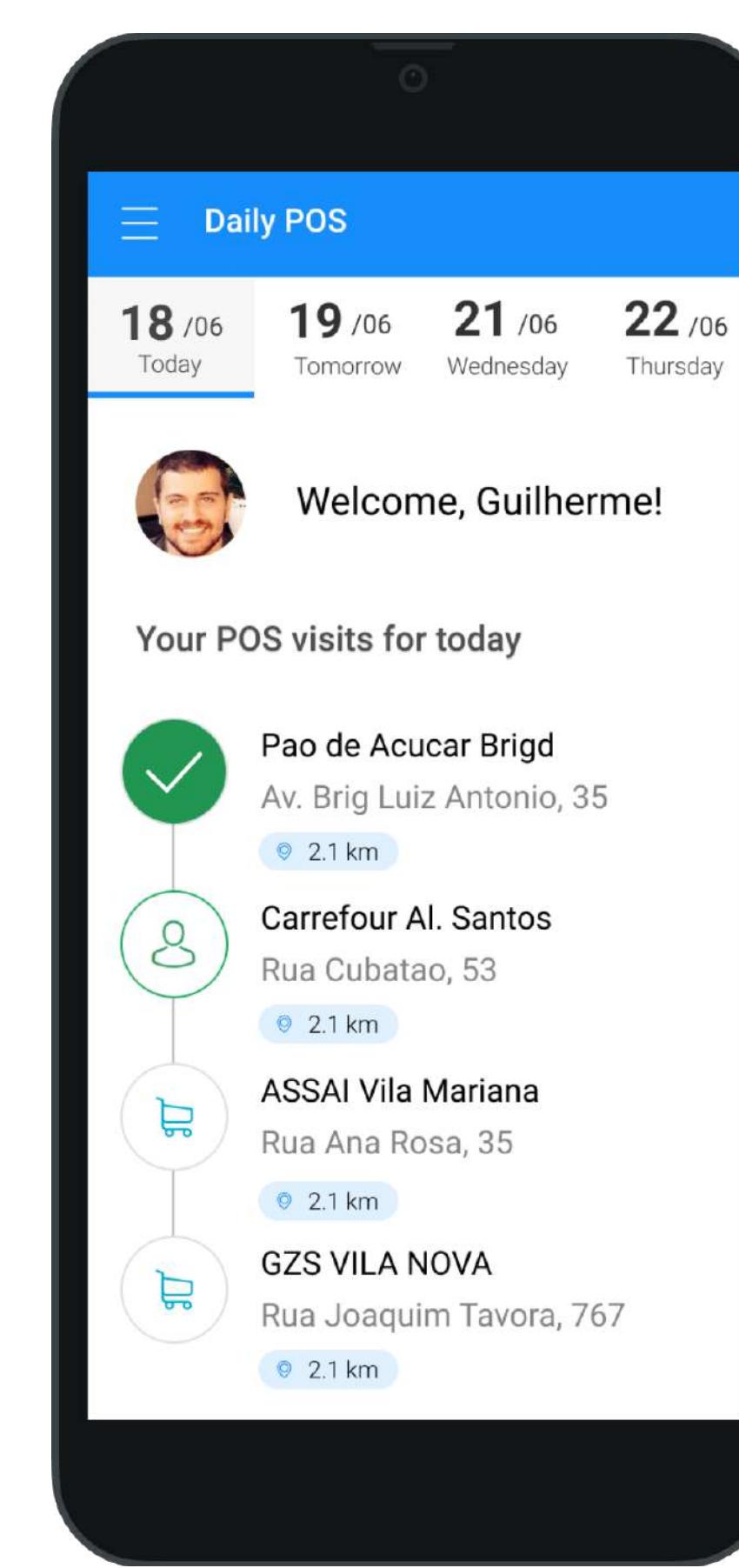
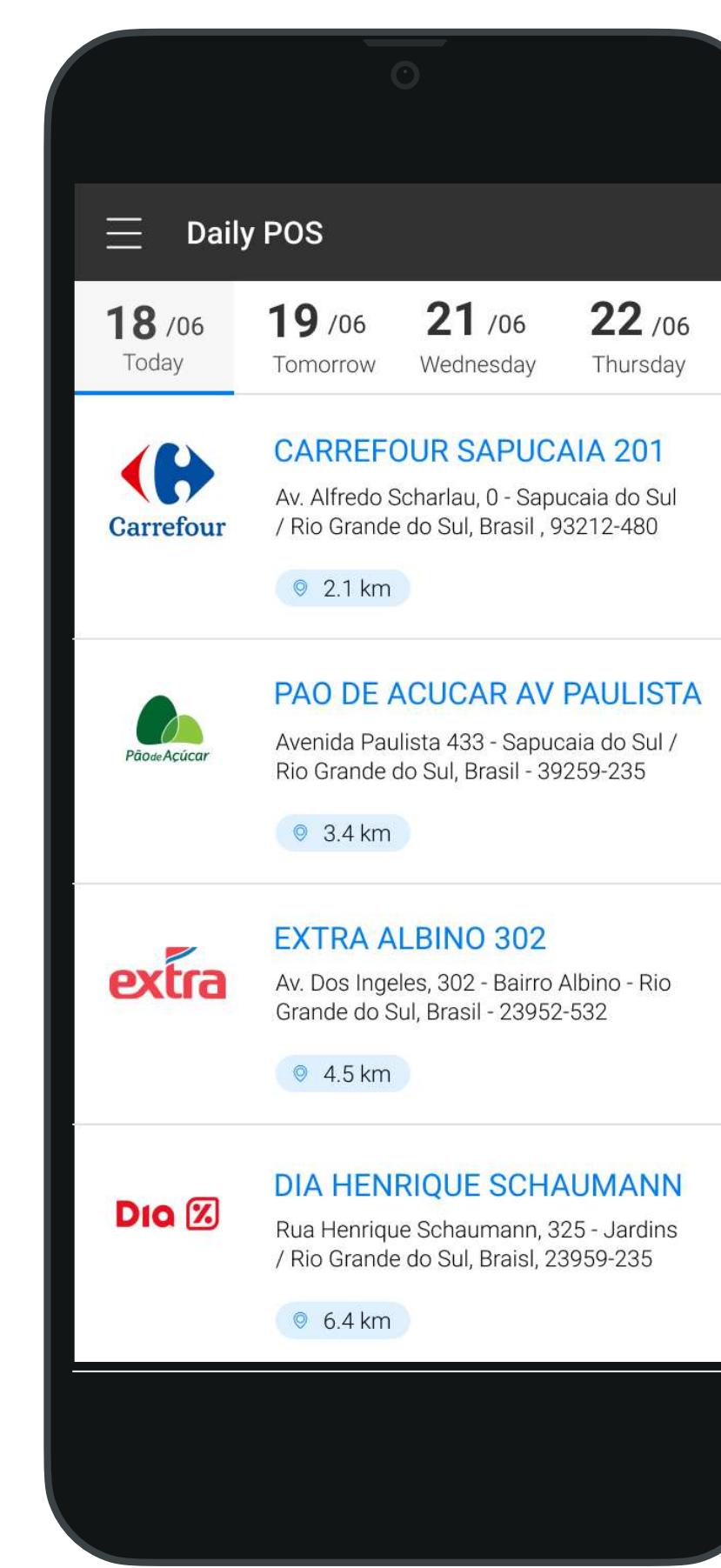
"According to our gathered data and research, we see that approximately 23% of users do not execute the POS in the ideal order suggested by the manager and displayed on the phone. We believe that by displaying the POS list in a timeline/linear fashion, users will have a more structured understanding of the orders that the POS should be executed. We will understand success when we see an increase of routes being executed in the perfect order"

Metrics:

of routes executed in the suggested order
of user inbound

Results:

- Not full-on
- Increase in routes executed in suggested order not significant
- +4.3% increase in inbound



Hypothesis:

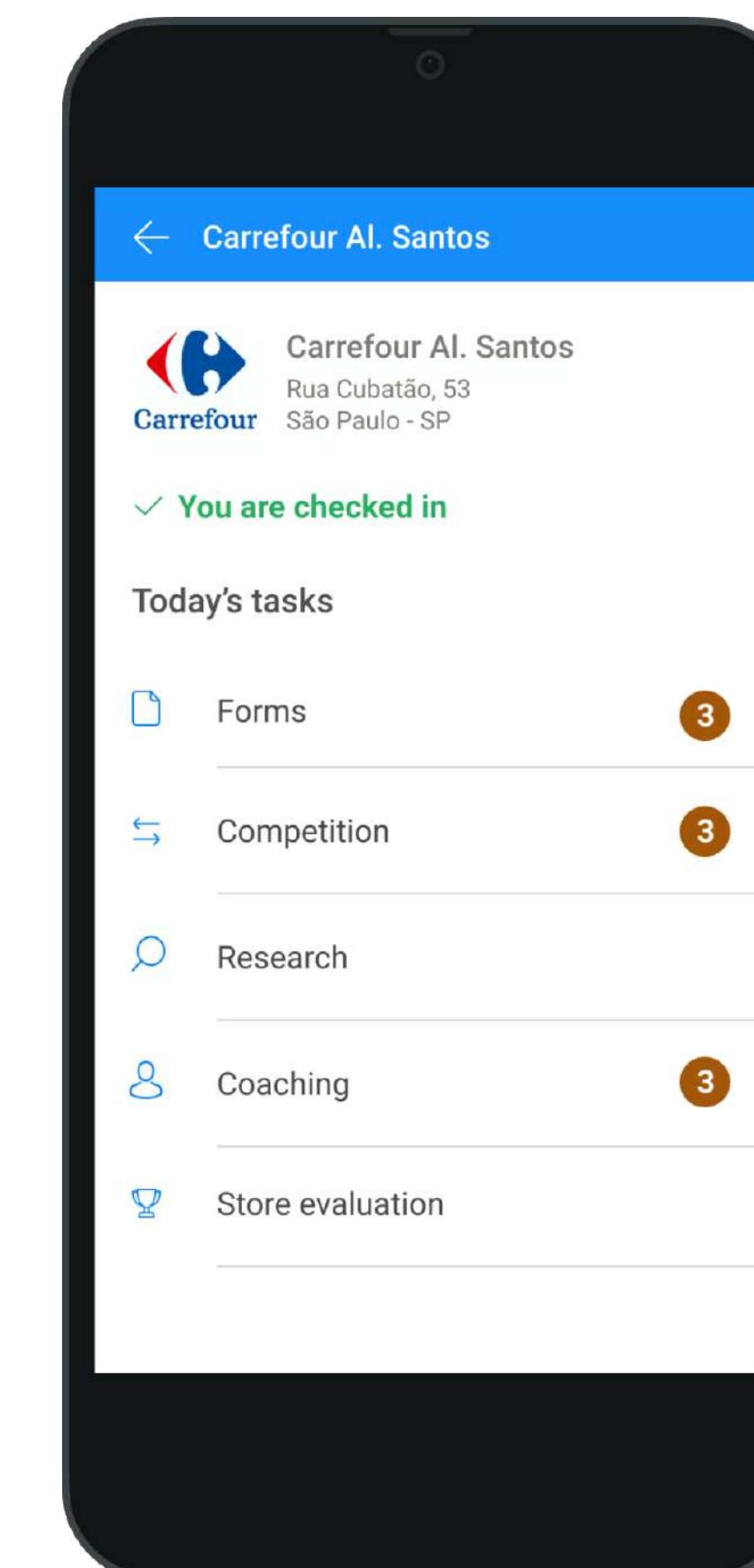
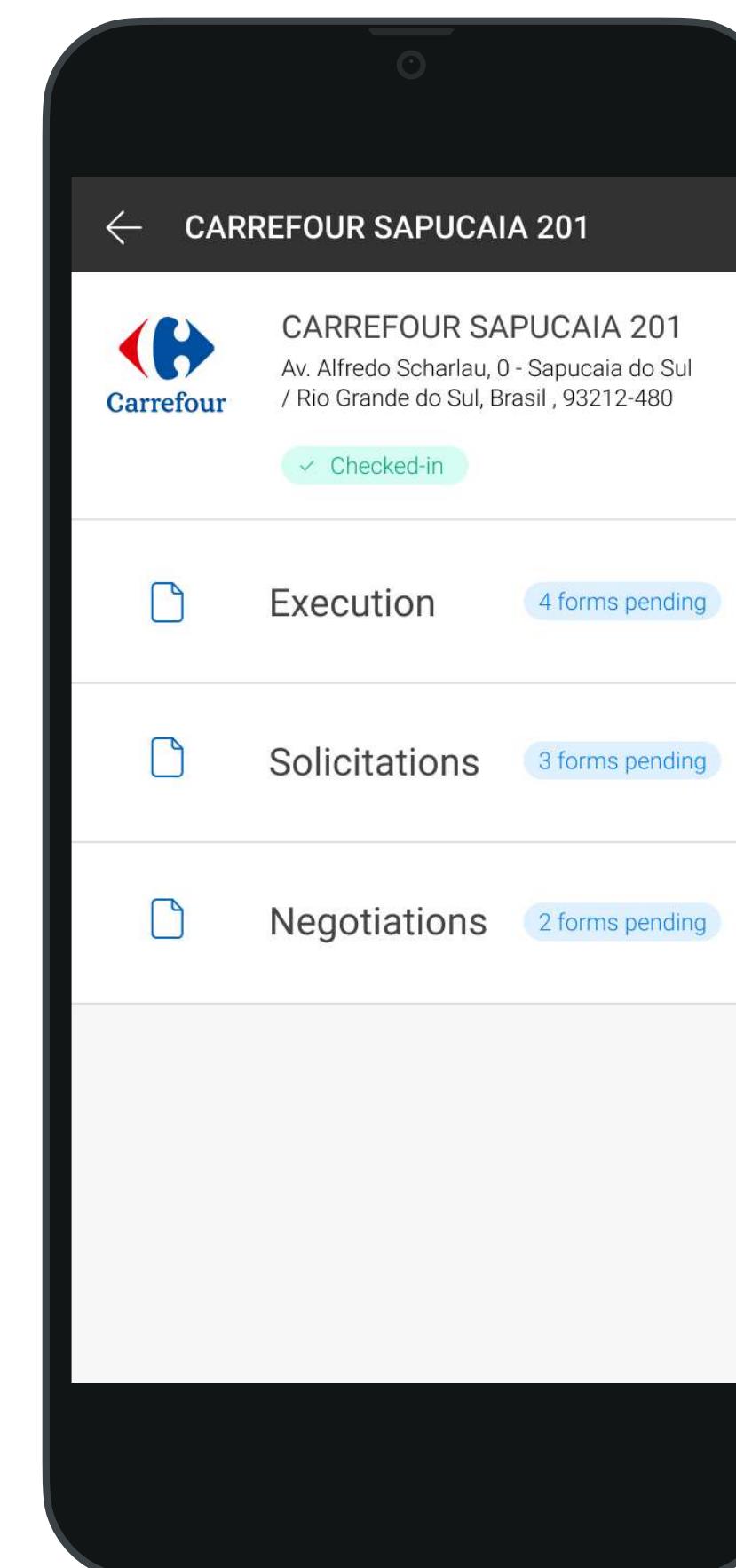
" According to user testing, 23% of the users found the badges hard to read. In addition, as we add more and more types of forms and tasks to be completed, scrolling can happen and some form names could be very big, making the design break in some cases. We aim to fix this by making the content more readable and avoiding repeated information. We will know this by a non-inferiority test the following metrics:"

Metrics and full-on criteria:

Increase in time spent on the page not bigger than 10%;
% of user inbound not big than 1%

Results:

- FULL-ON
- Non-inferiority criteria met
- Change on time spent on the page decreased by 8%
- Easier to add more content to the page after the full-on without breaking the design
- Follow-up research showed that the users clearly understood that the number on the B version was easy to read and understand that it was the numbers of forms pending



Hypothesis:

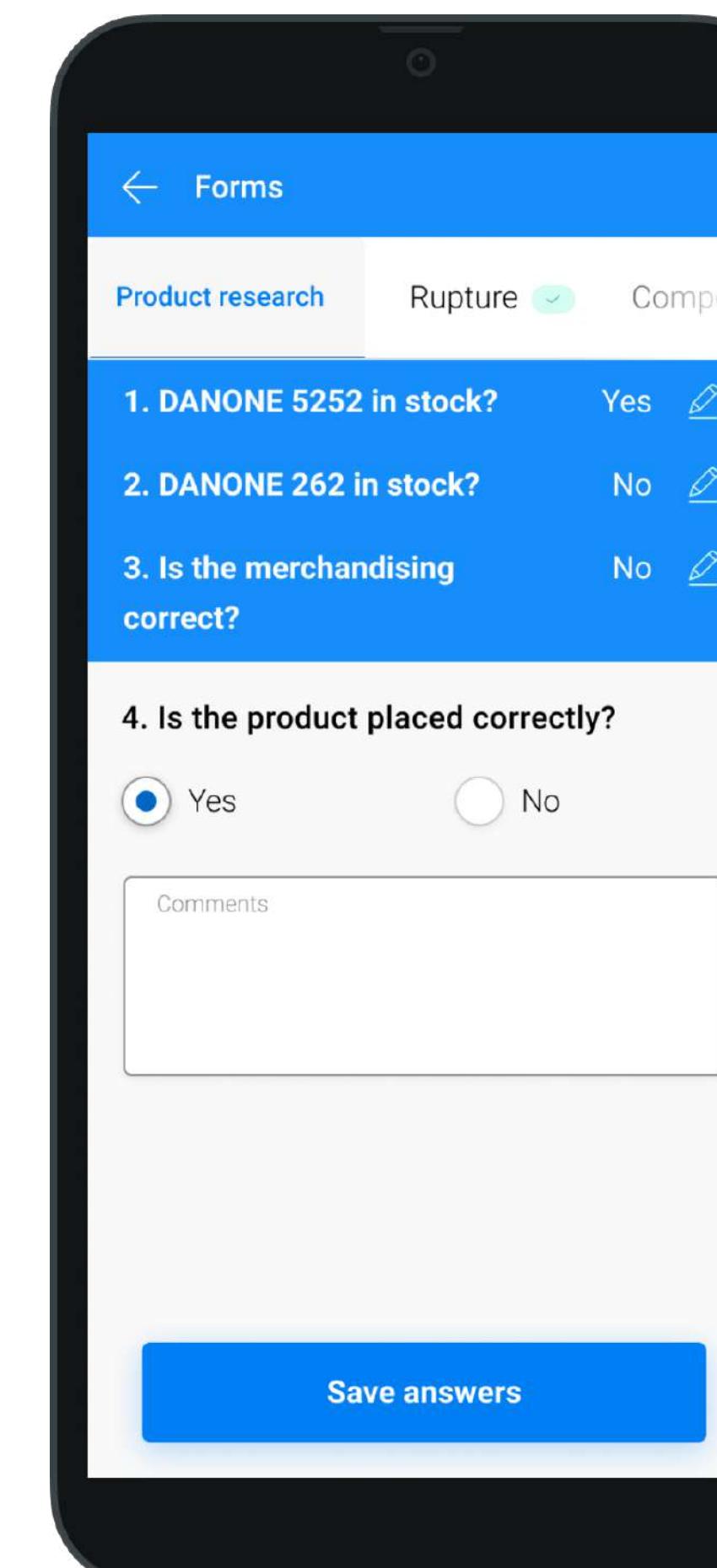
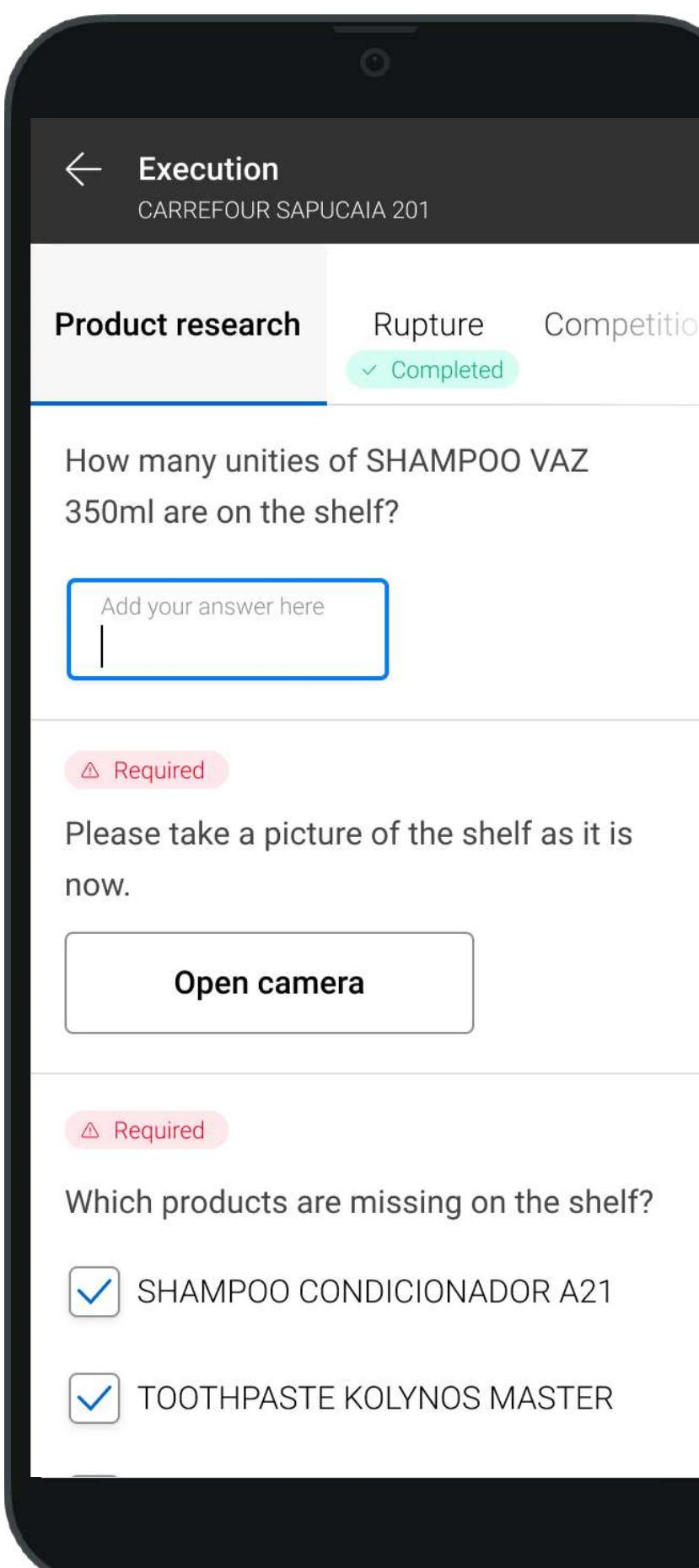
"According to user feedback, sometimes the forms are very long and users find it hard to keep track of every question in each form. There is too much information on the screen, making it hard for them to read every question and organize themselves or have a general overview of the questions. We aim to solve this by making the questions collapsible/expendable and showing the answer in the same line. We will know that this is successful by measuring the average time spent in completing forms, amount of scrolling and how many forms are submitted without all the questions answered"

Metrics:

Average time spent on a form section
Average completion time for a form
Form submissions with questions not answered

Results:

- FULL-ON
- Average time spent on a form section decreased by ~8s
- Form submissions with questions not answered decreased by 21%
- Follow-up research told us that users found the new version make them feel more secure about submitting the right answers and easier to have an overall view about the form





Trade Force

#1 solution for Trade Marketing field teams management

Company website

Retail Execution and Monitoring
App enables the execution of in-store activities

Trade Force provides a complete retail execution and monitoring technology that identifies tasks and enables the execution of in-store activities.

Check out the video!

Mobility Creating Results

Today many businesses have employees who visit outside customers or points of purchase (POP). These companies face many problems measuring the efficiency and implementation of the field teams' activities. It is also critical to deliver strategic information to enable them to perform the activities in the POS with greater efficiency.

With our app for smartphones and our cloud-based system, it is our main concern to fill segment deficiencies through a complete management solution for Trade Marketing field teams and to provide intelligent results in an integrated manner.

Meet some of our solutions:

- Keeps Track of Routes and Geotargeted Visits
- Creates Custom Forms for Data Gathering
- Presents Dashboards and KPIs Updated in Real Time
- Validates Virtual Stock
- Researches Prices and Oversees Competition
- Captures and Controls Territory and Material Expansion

....and more than 50 other features. Learn more about our app!

Trade Force creates and sends intelligent Trade Marketing information enabling field teams to convert the data into effective results. Increase efficiency and productivity of your staff and your Trade Marketing strategy!

Owner of a Global Empire, Jorge Paulo Lemann innovates and bets on technology

The richest man in Brazil - partner of huge companies, such as, AB InBev brewery, Burger King fast food chain and the food company Nestlé - Lemann diversifies his portfolio and invests in other business such as the social network Snapchat and the Ad Company Movie. [...]

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About Trade Force

Trade Force is a young company, which identified a need in the marketplace to change the Trade Marketing team management. Our App changes the way companies do Trade Marketing management, making POP a strategic resource for decision making.

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Company

We turn **mobility** into **intelligence**.

Trade Force was founded to offer the market a complete solution platform and **Trade Marketing field team management service**. We are driven by **constant innovation**, in both technological advances and how business is done.

OUR HISTORY

Trade Force is a young company, which identified a need in the marketplace to change the Trade Marketing team management. Its market know-how, coupled with its system development technical knowledge, and a relentless thirst for innovation has enabled the creation of an extremely adherent tool to customer's businesses, adding value to the transaction and obtaining all the strategic potential of POS.

WHAT WE DO

We change the way companies do trade marketing management, making POP a strategic resource for decision making.

OUR BELIEFS

We are driven by constant innovation, in both technological advances and how business is done. We create partnerships that foster mutual growth through measurable results, uncomplicated solutions and service excellence.

About Trade Force

Trade Force is a young company, which identified a need in the marketplace to change the Trade Marketing team management. Our App changes the way companies do Trade Marketing management, making POP a strategic resource for decision making.

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