



BASE DESIGN CHALLENGE

Yi Nie

THE CHALLENGE



REDESIGN CURRENT DEAL PROFILE

The current Deal profile in Base needs improvement. Customers want to be more productive, and based on feedback they are looking for an improved profile that addresses these three issues.

- Improved organization of information
- Scalability
- A quicker way to add objects to a Deal

[< Back](#)[Edit](#)

NY - G2 - Adam & Eve Website

\$74,000

Susan Norfleet

2

0

0

1

0

31

0

<

STAGE

>

Meeting

Contact

Susan Norfleet

>

Owner

Tyler Black

Collab.

None

>

Added On

Apr 14, 2014

Win Likelihood

50% (user input)

Tags

Chicago Summer Promo

MAY 6

\$ Tyler Black moved NY - G2 - Adam & Eve Website → Meeting

May 6

PROCESS OVERVIEW

Aks Questions



User Research



Wireframe



Test



Constraints



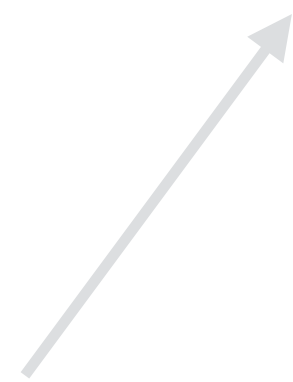
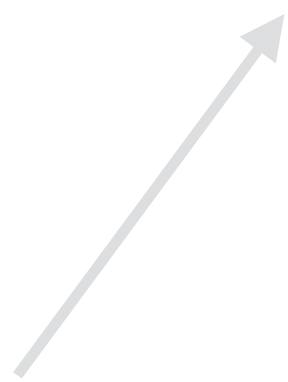
Ideation



Prototype



Iteration



START WITH QUESTIONS AND CONSTRAINTS



ASK QUESTIONS

- What is the process of a deal?
- What is sales pipeline and how does it help sales person?
- What information involved when working on a deal?
- How can Base fit into sales person's process?
- What are the scenarios and contexts of using mobile CRM application?
- When and why does sales need certain kind of information?



MY DESIGN FOCUS

After analyzing the design challenge prompt, I decide to constrain myself on the improving the interaction of current deal profile rather than add more functions to it.

UNDERSTAND CRM SYSTEM



SECONDARY RESEARCH

- BASE website: general information, support page and eBook
- BASE mobile APP
- Competitor website: Salesforce, Microsoft Dynamic
- Medium Articles of CRM design

CRM

🕒 7 days ago in **Yellow**
CRM Design Related
1. Eliminate unnecessary data entry

🕒 7 days ago in **Yellow**
Understand CRM
1. Have Strong Processes
2. Preparation: understand the customer

🕒 6 minutes ago in **Yellow**
How would you explain CRM to an 8-year-old?
A CRM is an address book of all your friends. It helps

🕒 5 minutes ago in **Yellow**
CRM is like a really large collection of Lego sets. Each set has its own story and instructional booklet behind it, as does each account and lead. A **more...**



Lead, deal and sales pipeline

🕒 11 minutes ago in **Yellow**
What is a deal?
A Deal is a sales opportunity you've identified through one of your Contacts or Leads.

🕒 10 minutes ago in **Yellow**
What is Lead?
The Lead to Contact conversion is the first

🕒 9 minutes ago in **Yellow**
What is Sales Pipeline?
The sales pipeline will allow you to move your Deal through a series of

🕒 6 days ago in

Screen Shot 2016-03-31 at ...



Pipeline Stage

🕒 4 minutes ago in **Yellow**
Picture your sales pipeline as a funnel with a few

🕒 3 minutes ago in **Yellow**
Prospecting

🕒 3 minutes ago in **Yellow**
Qualified

🕒 2 minutes ago in **Yellow**
Quote

🕒 2 minutes ago in **Yellow**
Closure

🕒 2 minutes ago in **Yellow**
Won or Lost
Tracking your sales using a CRM tool with a sales pipeline will give you these important insights. Once you **more...**



UNDERSTAND USERS



USER RESEARCH

- Interviewed with former sales at Nancy Art Space
- Looked through reviews of Base mobile application on App Store
- Articles about how sales person work and tips for successful deals

PROVIDE MORE INFORMATION AT A GLANCE

Before meeting or a call, sales person always need to do research on their client about their background information, the company's updates as well as their problems, so it is important for them to recap the all information right before the meeting or call.

QUICK INTERACTION ON MOBILE

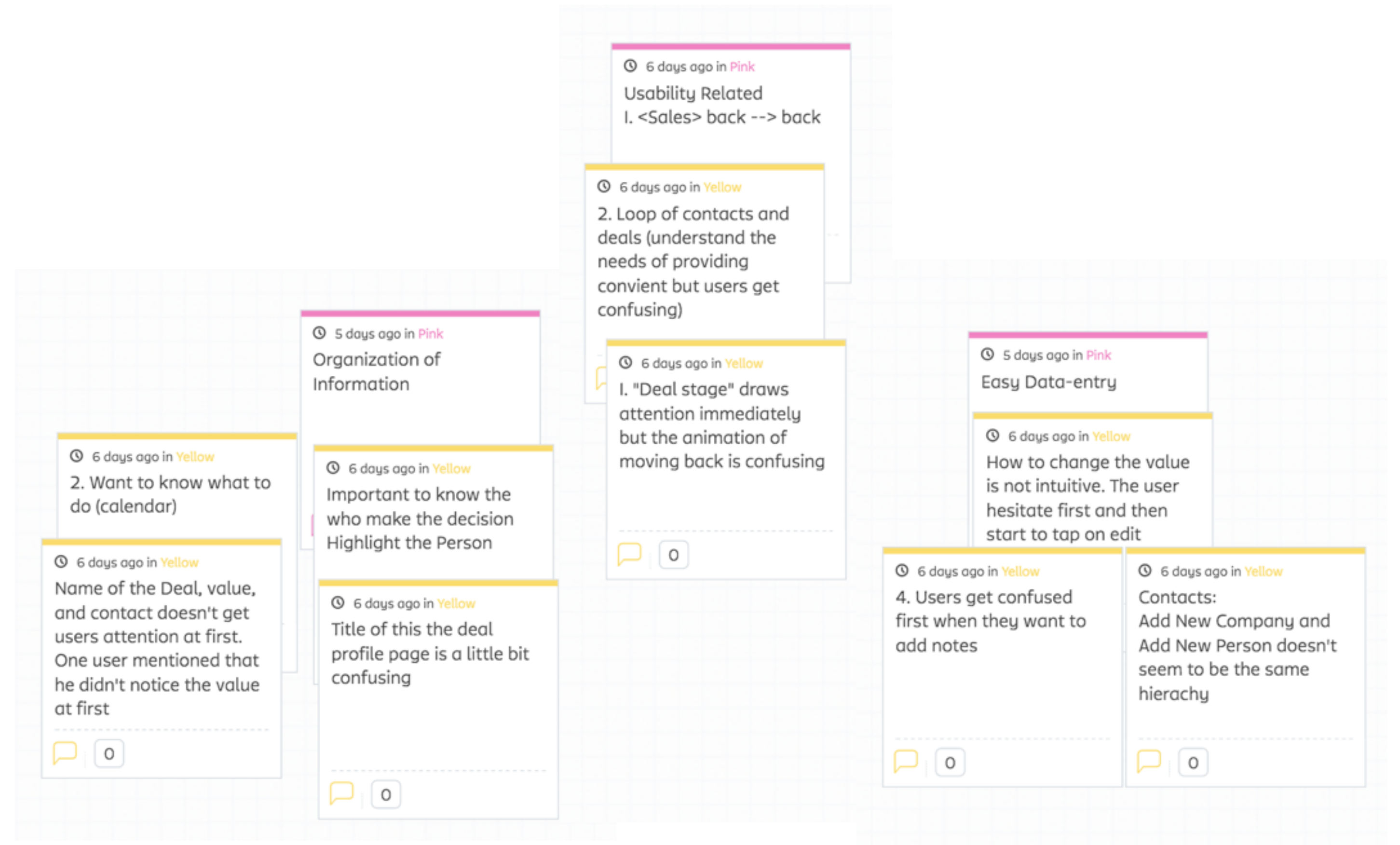
Sales have to work with a lot of deals at the same time so efficient is pretty important for them especially when they are using mobile device, which means they are probably heading to a meeting. So providing efficient and quick interaction is important.

UNDERSTAND THE DESIGN

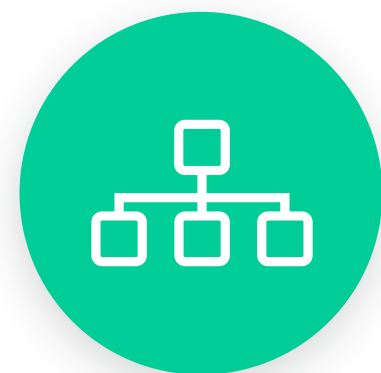


EVALUATE CURRENT DESIGN

- Evaluate current design with two participant who have sales experience
- Looked through reviews of Base mobile application on App Store



IDEATION



INFORMATION ARCHITECTURE

According to the user research and my understanding of how CRM works, I regrouped the information of current deal profile based on the frequency users will view or add data. One participant mentioned that he will use activities and collaborator when there is new team members involved in the deal, so I put these information into second tab.

TAB 1

Deal Name Editable
Value Primary Contact
↑

STAGE Important Editable

Group 1

TAB 2

Collab. Editable

Owner Editable

Tags

Source

Added on Time

Group 3

Notes

Communication

Documents

Date Name

Task

Timeline

Appointments

Contact

contacts & Companies
Primary

Group 2

Activities

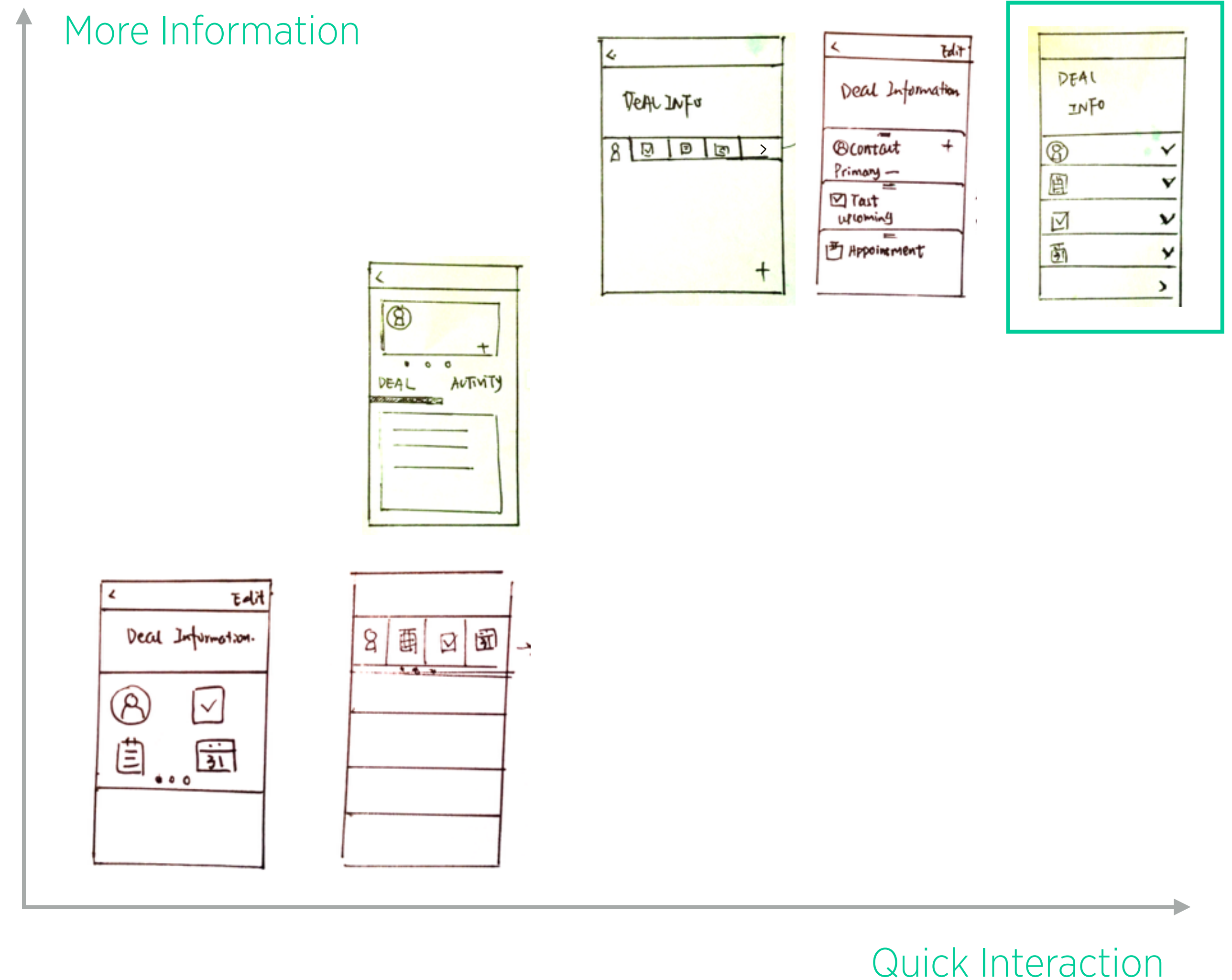
Group 4

IDEATION



INTERFACE WITH SCALABILITY

In order to solve the scalability issue as well as provide possibility to customize deal profile, I sketch out several concepts. Base on sales person's needs of view more information at one time and quick interaction, I organized these concepts and select one to develop further.

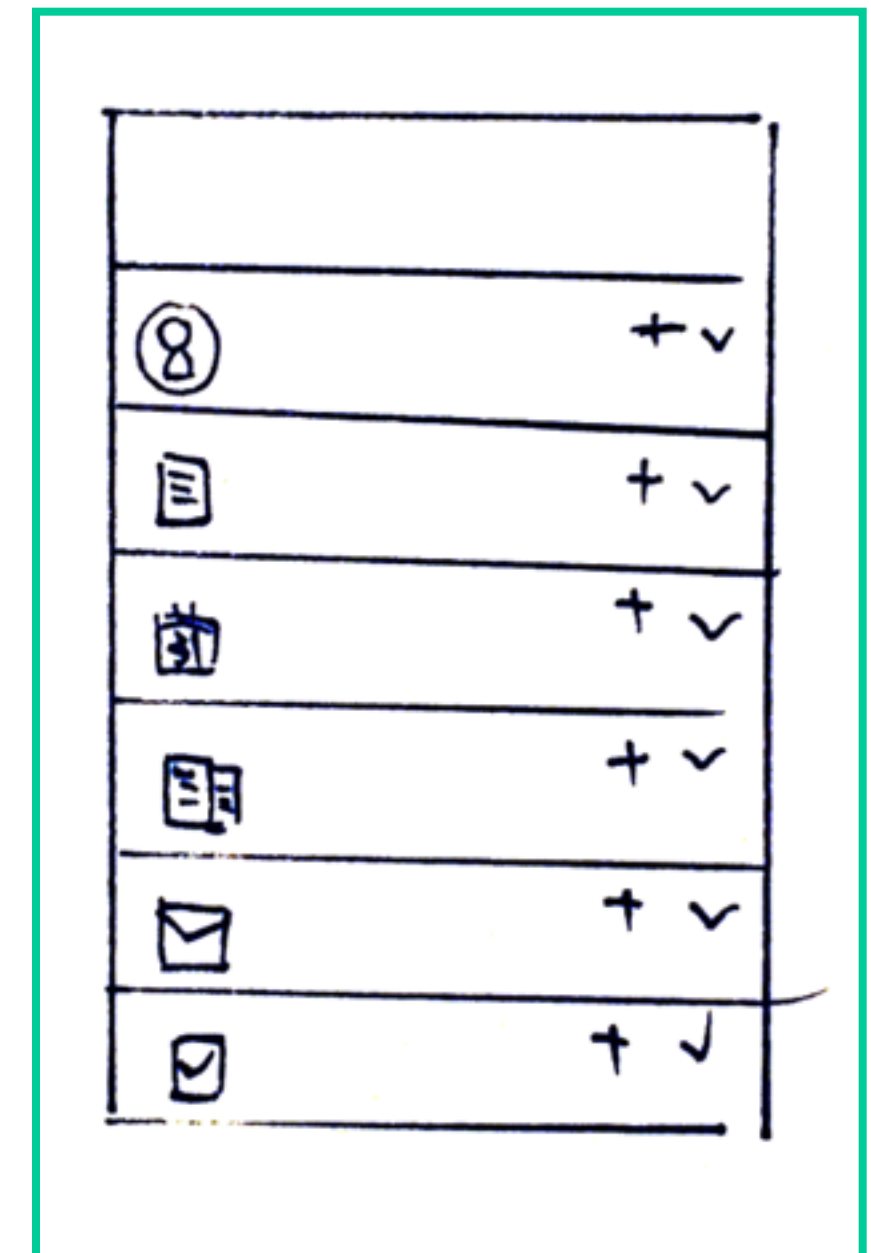
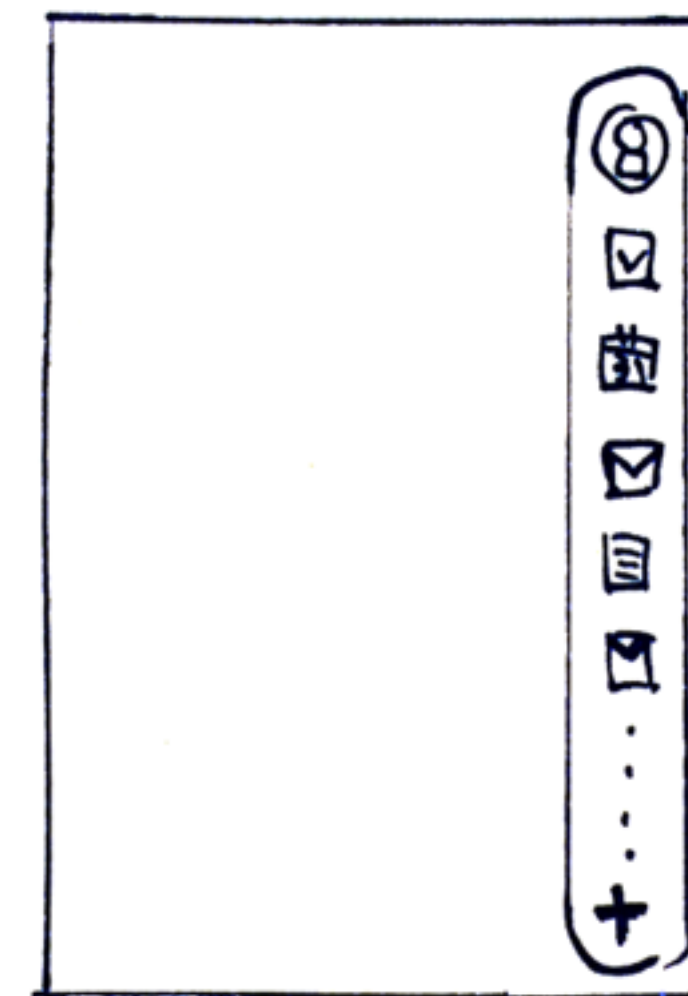
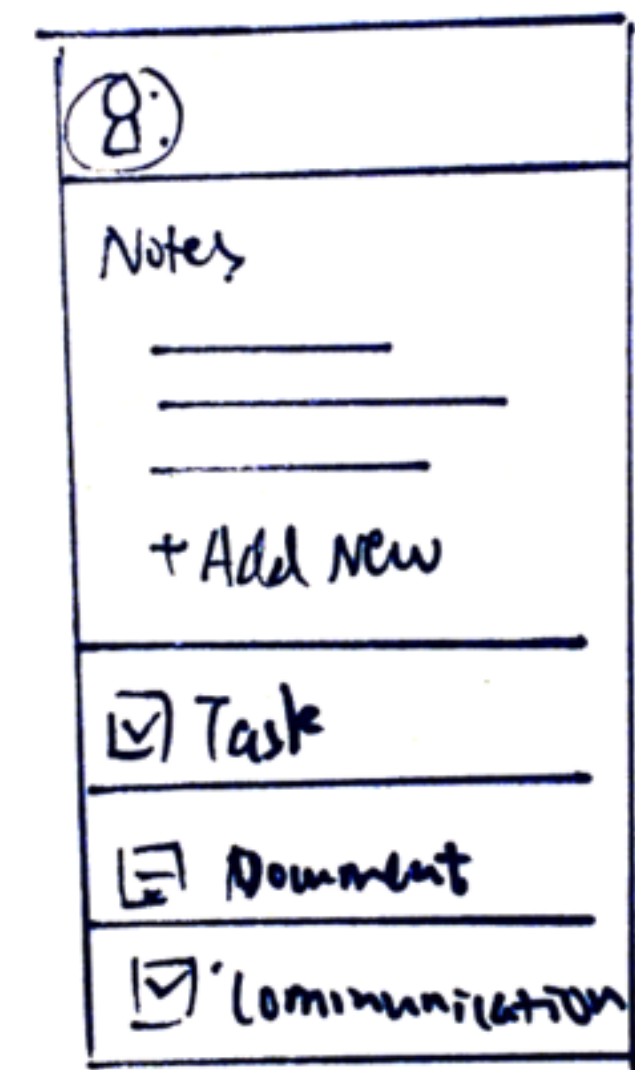
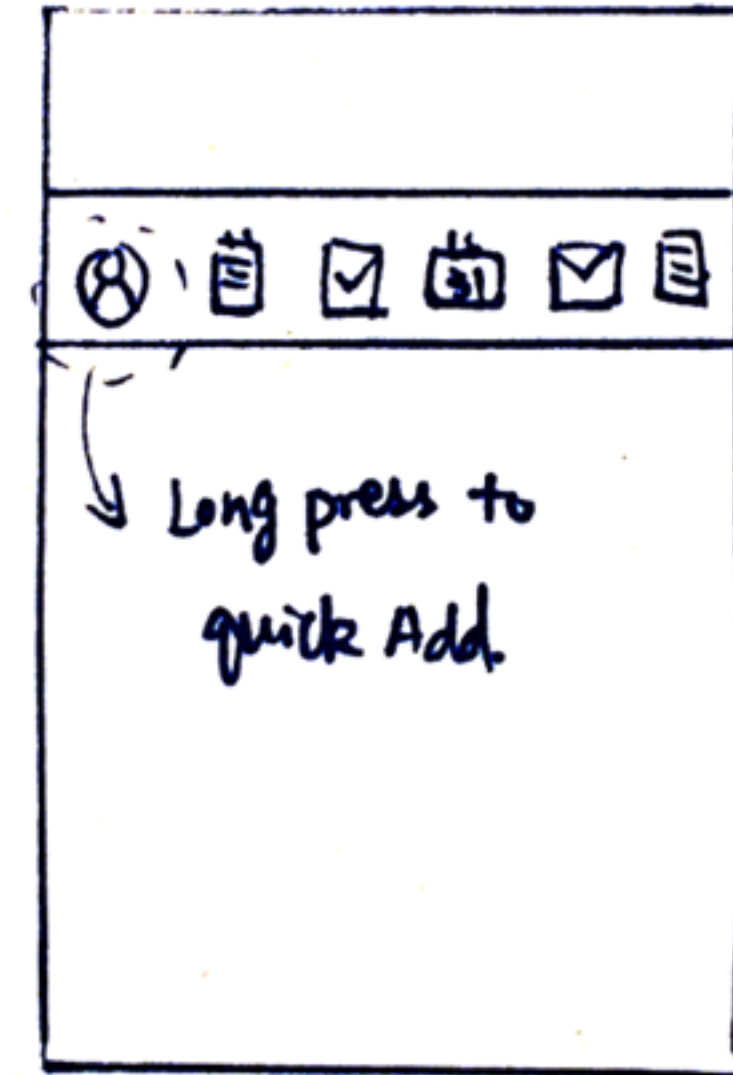
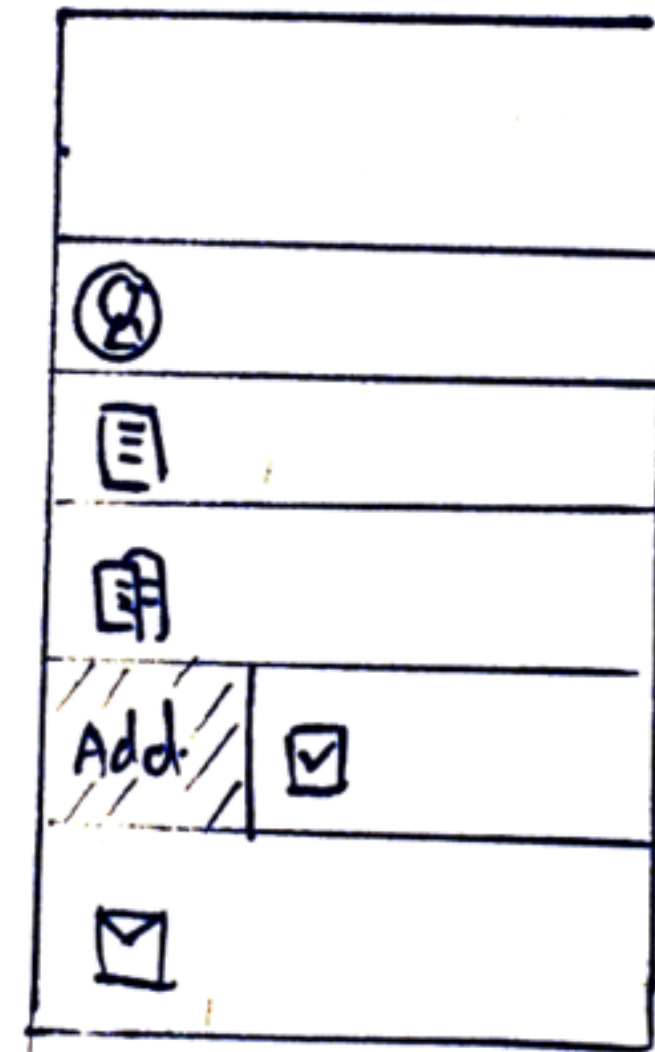


IDEATION



QUICK WAY TO ADD OBJECTS

I explored several ways to quick add objects within the main page. How I decide on using which concept depends if the interaction is clear or intuitive to users and how the concept can work well with scalability.

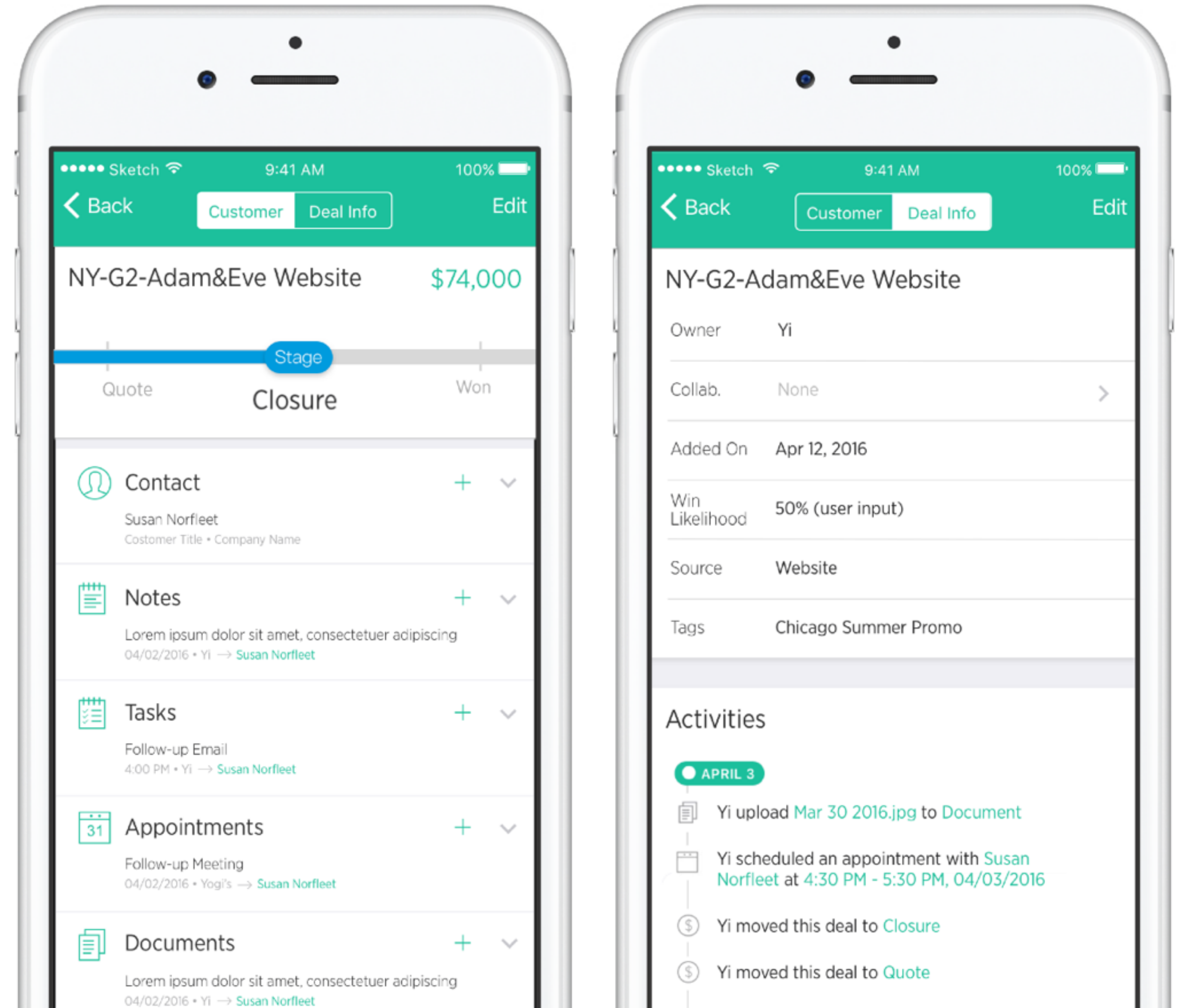


FINAL DESIGN

INTERFACE OVERVIEW

The categories are organized in a list view and users will be able to take a look at the latest items within them so that users will have a better understanding of where this deal is and what they need to do with a glance. In the “Contact” card, the name showed is this deals’ primary contact.

Assumptions: The latest items within each category is the most important for users

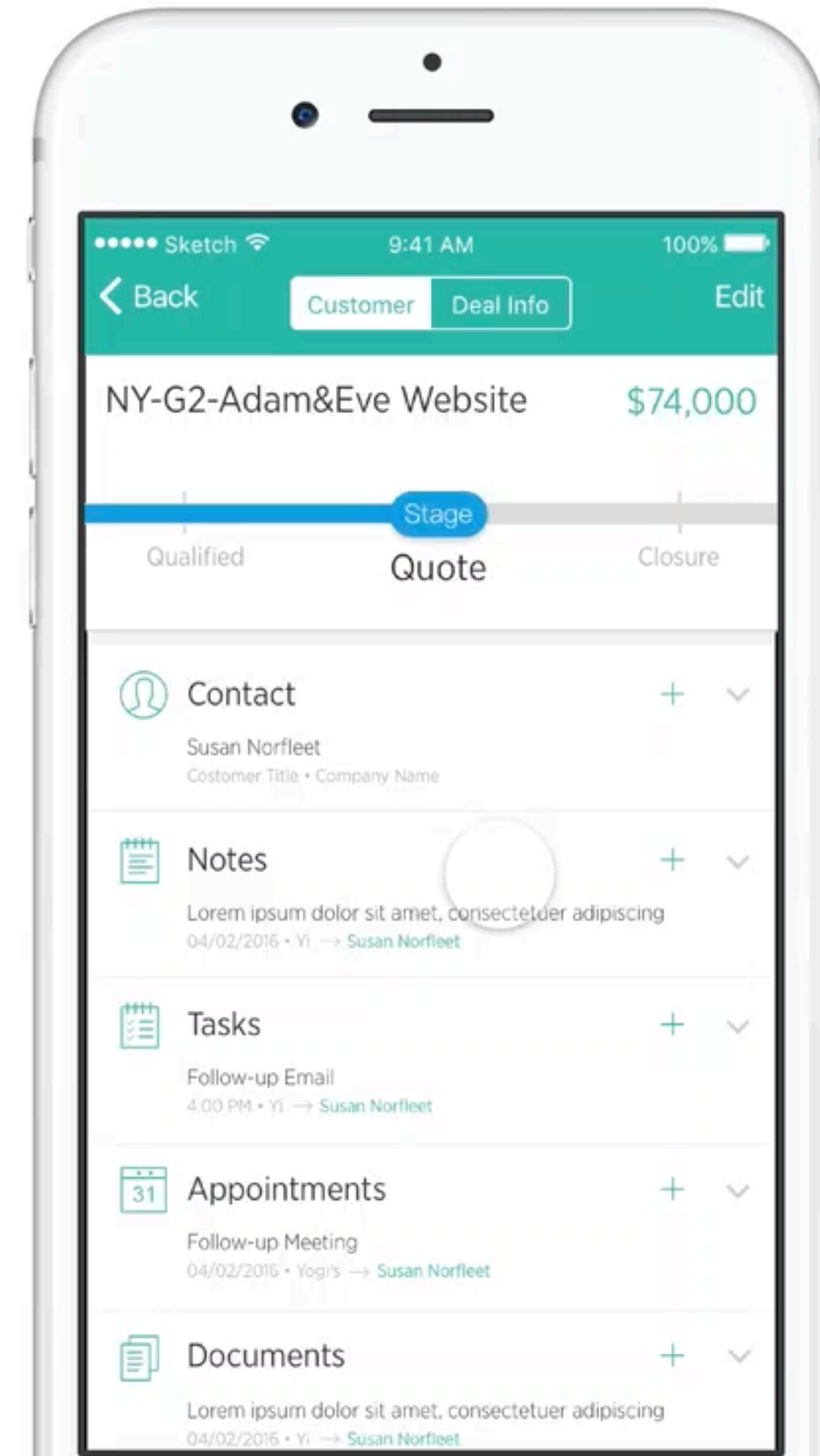


FINAL DESIGN

MOVE DEAL TO NEXT STAGE

By providing the earlier and next stage users will have a better context of this deal's stage. There are only three stages included because it will give user enough space to swipe to avoid making mistakes.

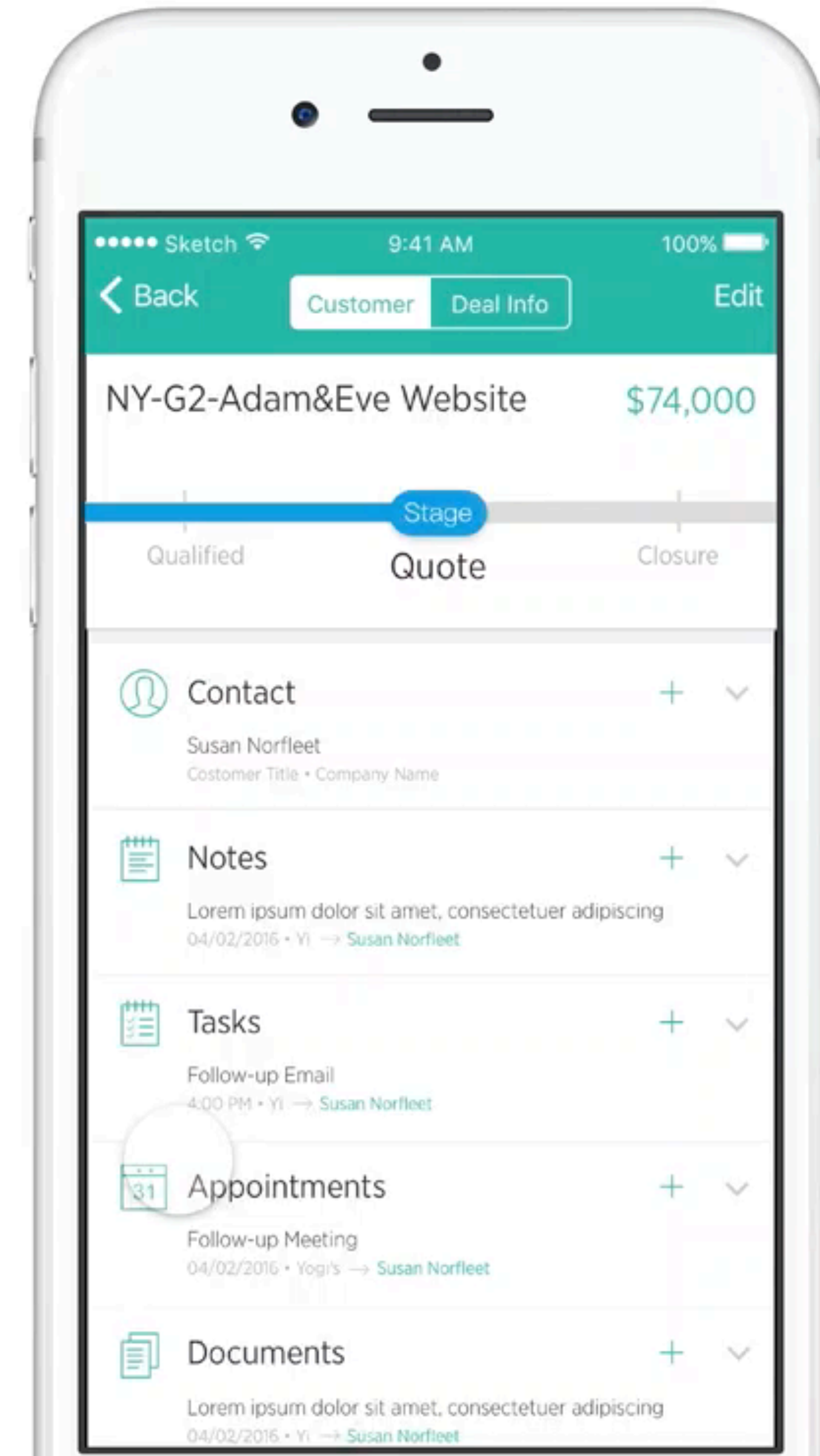
Assumptions: I keep the “swipe” gesture to move the stage because I think this will give users feel of achievement. And the motion of whole stage bar moving will make users feel they are making progress.



FINAL DESIGN

EFFICIENT WAY TO VIEW INFORMATION

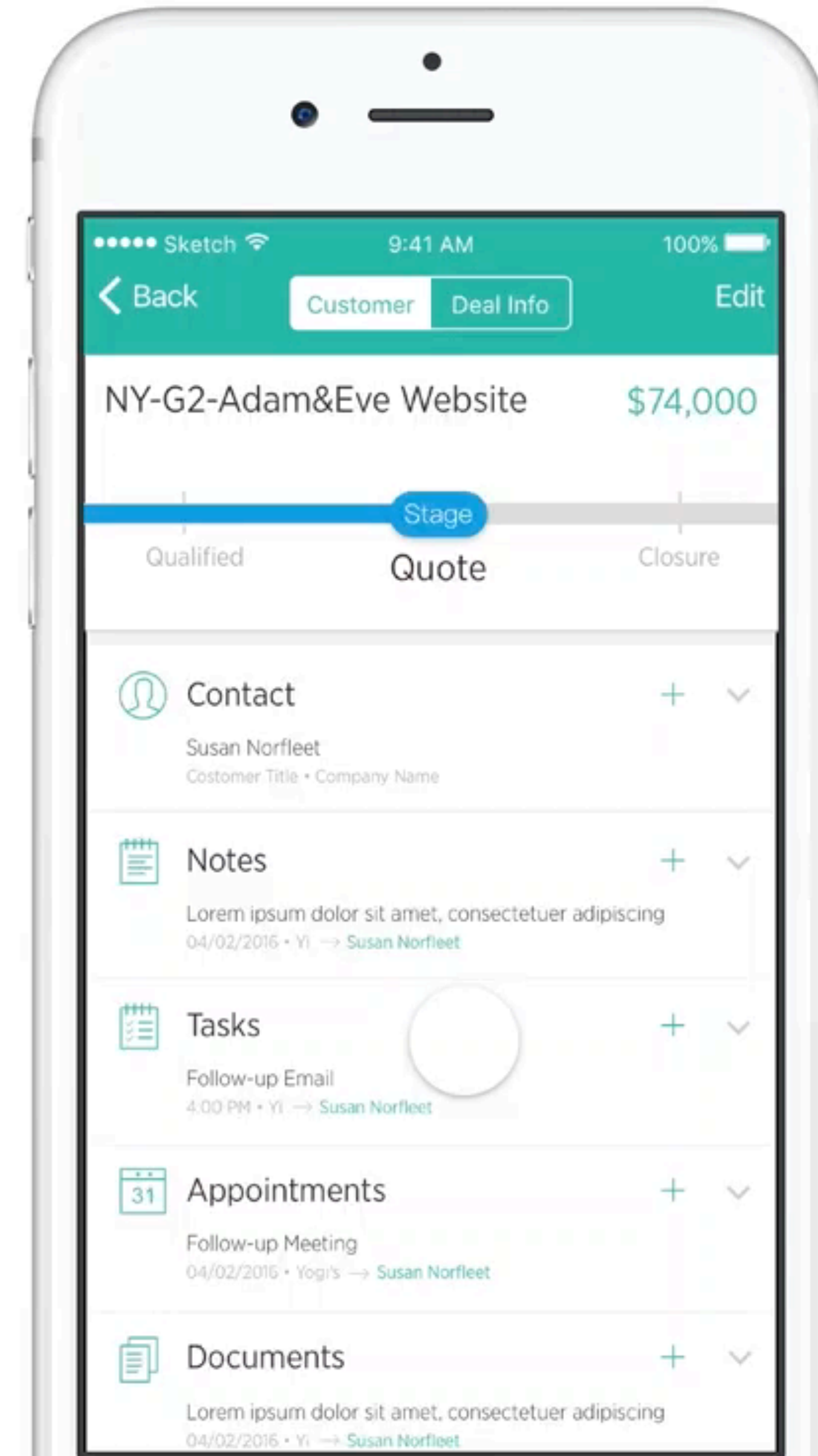
When users want to see more information within each category, they can expand the list. Users can open multiple categories and they can scroll down and up to view the information as opposed to navigate through several pages.



FINAL DESIGN

EASY DATA-ENTRY

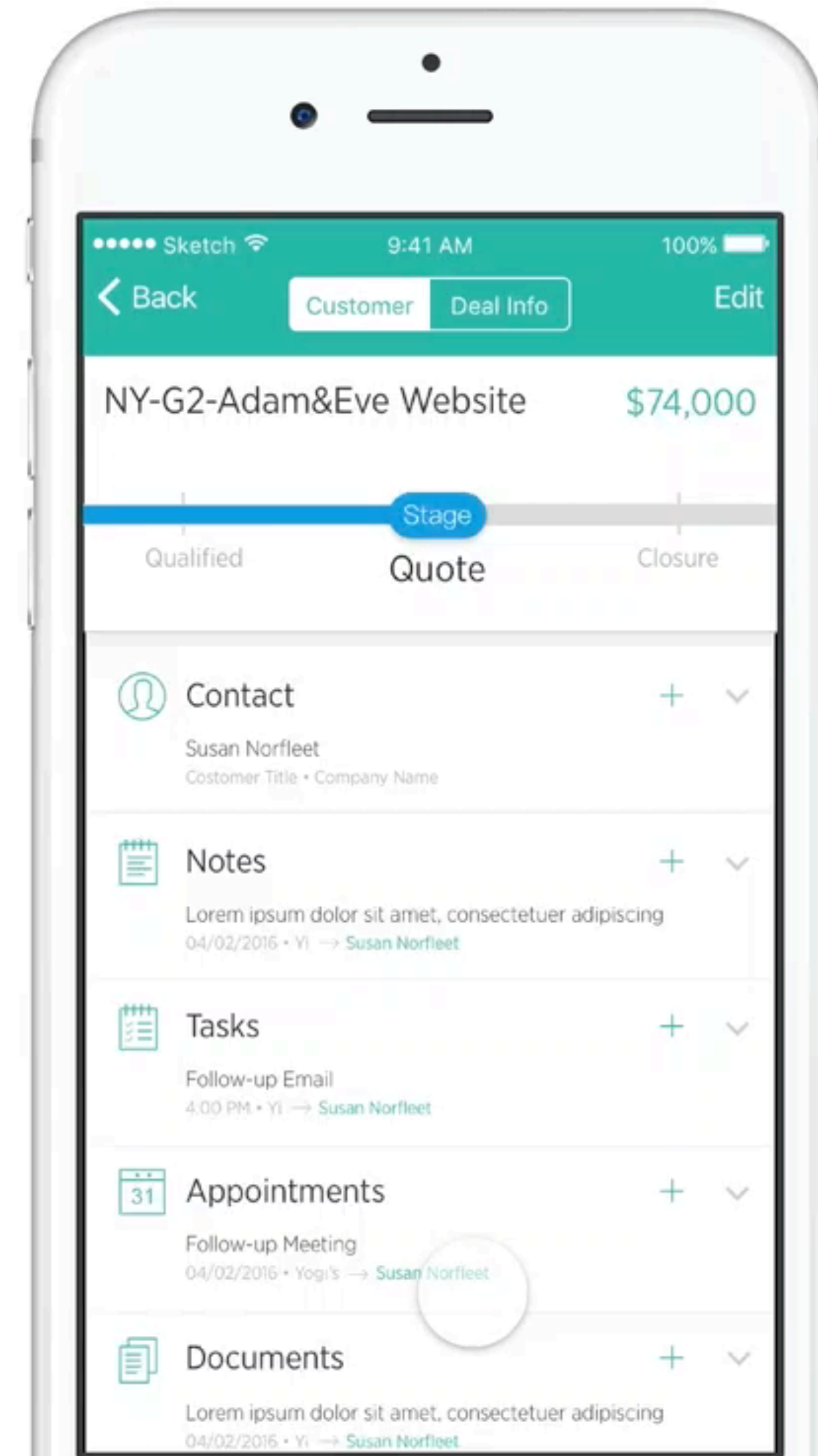
Users can add new objects into each category simply by using the add button. The animation will give users a clue of which category this object is added to



FINAL DESIGN

ADD MORE CATEGORIES

The list of category supports adding more category. To provide user enough space to view these information, basic deal information will collapse but also display the most important information of this deal. When user want to change the stage, they can go back simply by scrolling back.



PROTOTYPE

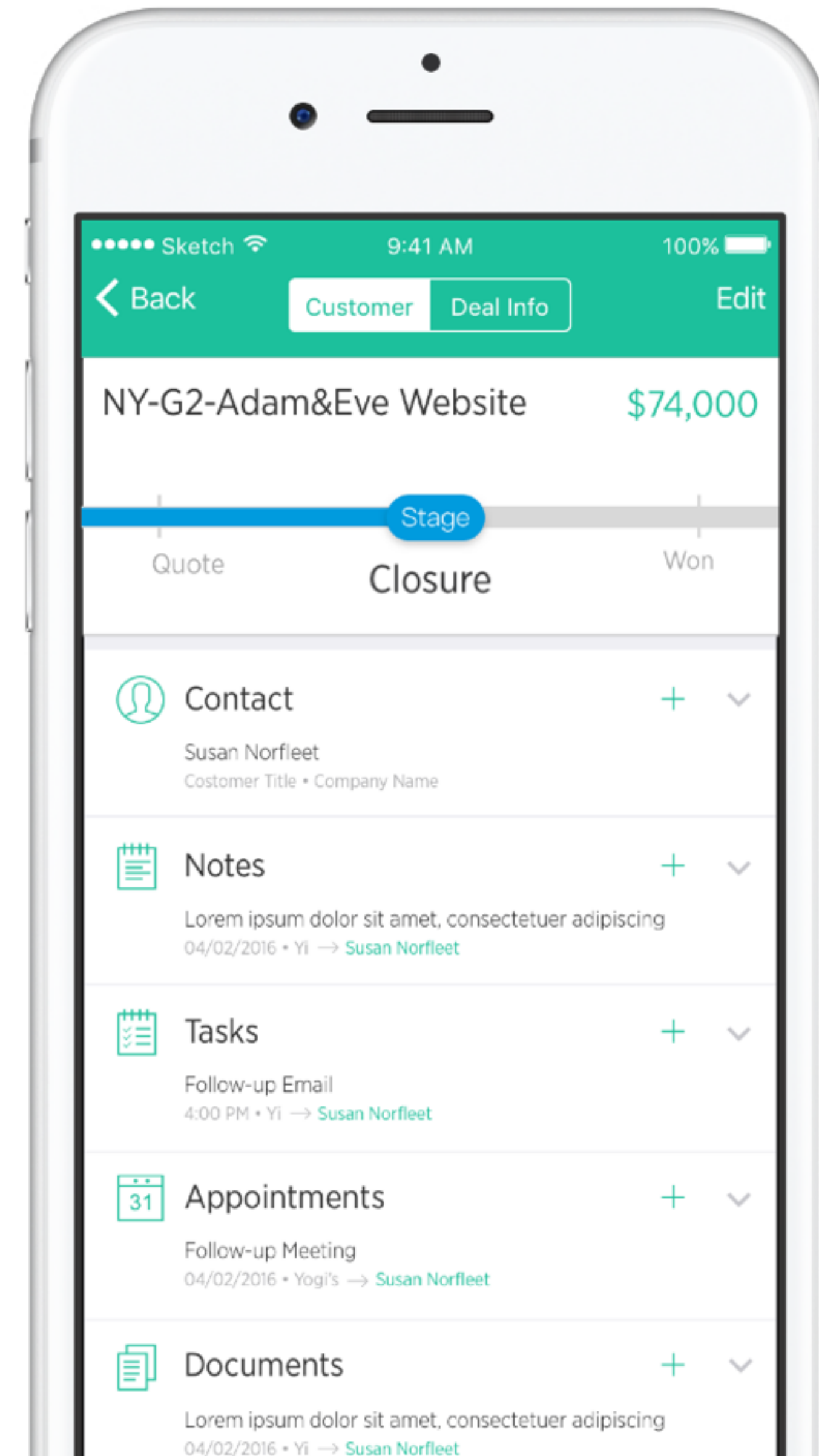


INTERACTIVE PROTOTYPE

Try the interactive prototype using the link. (Please open with Safari Browser, the prototype has some technical issuer with Chrome) You can also view and play with it with you mobile device

The prototype is made with Framer.js

<http://share.framerjs.com/uju2kpo2kca6/>

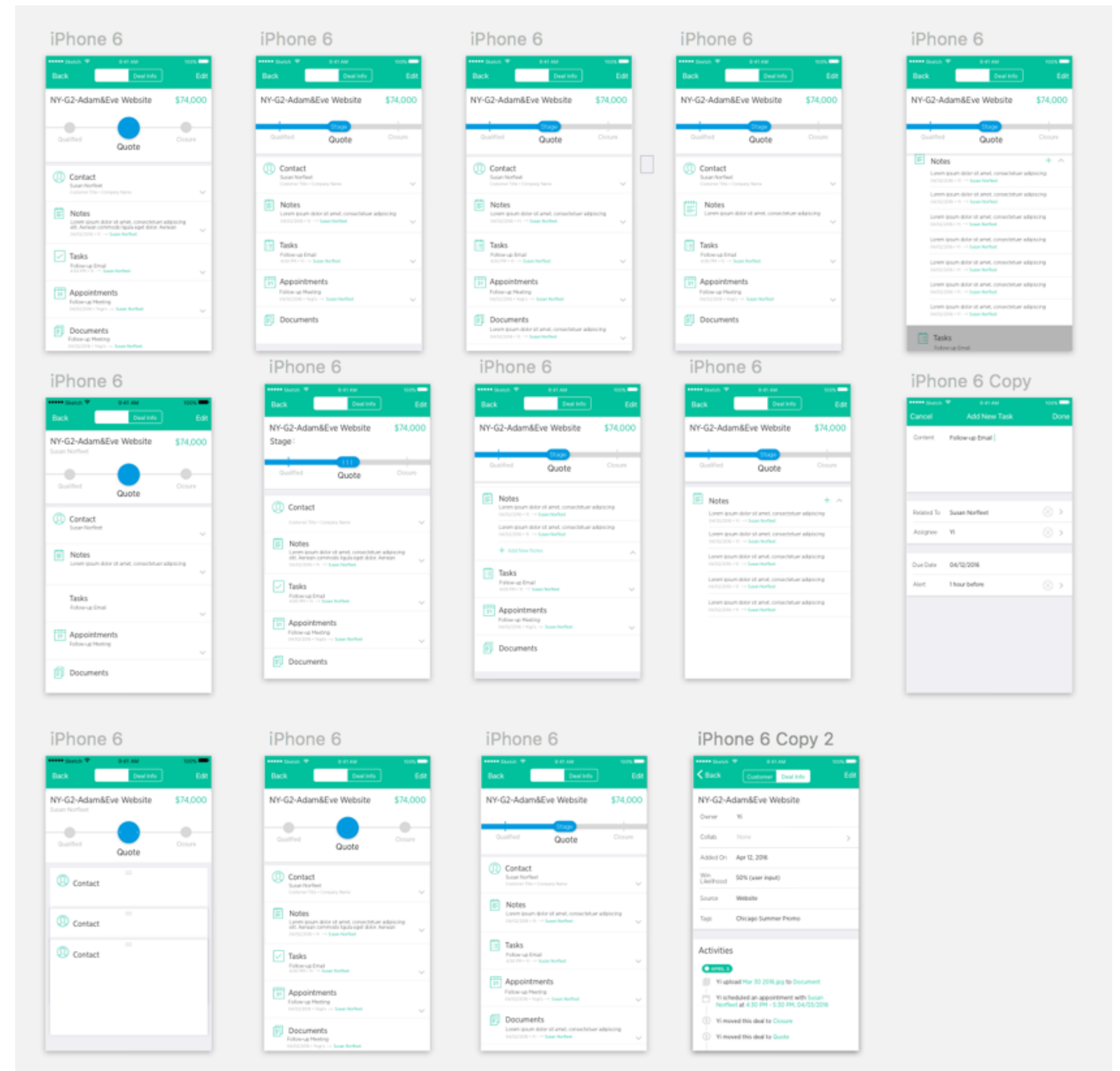


ITERATIVE PROCESS



ITERATE DURING THE PROCESS

During the wireframe stage, I did iteration in details like changing stage, icon of tasks, the way to expand each category and how to add new objects to category.



ITERATIVE PROCESS

STAGE CHANGE INTERACTION AS A EXAMPLE

The concept of present different stage first comes from the “steps” and “progress” design pattern. But during wireframe I found this concept doesn’t provide enough interaction affordance for users. So then I turn into using “slider” and start to iterate on the it to make it not only clear to interact with but also can present the stage information



Version 1



Version 4



Version 2



Version 5



Version 3



Version 6

FORMAL USABILITY TEST PLAN

GOAL

Test whether users can understand the interface and interaction well, and interact with the app on a mobile device efficiently.

PARTICIPANTS

8 participants with experience in sales. Ideally 4 with experience using an app to track the deals, 4 with no experience.

ROLES

3 researchers. One as the facilitator, introducing the test and give proper instruction to the participant. 2 observers, one takes notes, one video records. If video recording is not permitted, both observers take notes.

TASKS

- Run the prototype and view the first screen.
- Find the most recent note and view it.
- Add an entry in the Task category and save it.
- Change the deal stage to the next stage.
- Find out when (date) this deal was moved to this stage.

PROCESS

- Pilot Test
- Welcome and Introduction
- Tasks
- Observation
- Post-Test Interview
- Analysis

Complete test plan in a separate document

OTHER THOUGHTS AND REFLECTION

OTHER THOUGHTS

- Customization of deal stage
- Actions in contact list
- connect with news database
- Quick data entry in the deal pipeline page

REFLECTION

- Understand the field quickly
- Keep “why” and user scenarios in mind
- Dive into the design details

THANK YOU!