

TallyUP

User Research Analysis

Jeramie Castillo

jeramiec@uw.edu

This document compiles results from user research interviews to develop a further understanding of the project scope. The results also help form more project requirements to better curate a platform for business owners. This document studies the findings per each question asked to all interviewees.

1. What resources are you familiar with when it comes to inventory management?

- Microsoft Excel
- Quick books?

2. Have you ever created an inventory sheet for your business? If so, why do you use this? [If no] What features do you expect to find within this tool?

- Keep track of and organizes inventory
 - o Number of and Kind of Available stock
 - o Details of item (ex. weight)
- Keep track of profits
- Profit margins
- Consumer demand
 - o Purchase and sell goods based off this data
 - o Customer addresses
- Determine sales trajectory

a. What is the best part about your current methods for inventory management?

- Excel is easy to access (many people have this)
 - o Understanding what does and doesn't sell well
 - o Ability to find tons of information about business
 - o Equation functions to analyze data
 - o If any issue arises with order, allows Emily to keep track of which batch went wrong

b. What is the worst part about your current methods for inventory management?

- Sorting through large number of inventories
 - o No easy way to divide inventory by batches/categories
 - o No way to notify if restock is needed for specific products

- Specifically for varying conditions and types of vintage t-shirts
- Manual entries are very time consuming
- Organization issues
 - Difficult for entering different kinds of inventory types
 - Difficult finding older information especially when inventory is large
 - Difficult compiling weekly, monthly, and yearly sales information
 - Creating notes for items

c. Are there any features that would help provide you a better experience?

- Alerts
- Visual elements/cues
- Sub-category headers for categorizing
- Automation
 - Anything that would help minimize time spent inputting inventory

3. Tell me about your process when a sale is made from your business – provide me as many steps as you can starting with the moment a product is sold.

- Record information on phone then input into inventory spreadsheet later
- Mark item in inventory sheet as sold, subtracts shipping costs, purchases label (if applicable), and delivers product to buyer
- Buyer uses Google Forms as an 'invoice' which auto-populates sold inventory and customer data. Sold inventory adds to total number of lip gloss sold for the month

4. Why do you think businesses utilize inventory management tools?

- Organization
- Efficiency
- Maintain stock levels
- Understand supply and demand

- Prevent overproduction/purchasing
- Allows for easy transferability for a team. "Pick up where the person left off"
- Profits
 - Maintaining business trajectory
 - Familiarizing with data and maximizing sales

5. What resources are you familiar with when it comes to managing expenses?

- Microsoft Excel
- Google Spreadsheets
- PayPal
- Calculator

6. Have you ever created an expense sheet for your business? If so, why do you use this? [If no] What features do you expect to find within this tool?

- Track expenses
 - What is going in the company, what is coming out
- Track budget
- Track profit and losses
- Understand product pricing
- Understanding ROI
- Helps with business expansion
- Holds business information

a. What is the best part about your current methods for managing expenses?

- Automation for profits, costs, etc.
 - Equations
 - Sum, subtract, percentages, etc.
 - Calculate profit
- Shareability of Excel (many users own this program)

b. What is the worst part about your current methods for managing expenses?

- Time consuming
 - o Manual input is inefficient at times
- Organization
 - o Expense tracking
 - o Categorizing expenses
- Little room for customization

c. Are there any features that would help provide you a better experience?

- Automation
 - o Scanning of products
 - o Easier information input
- Organization
 - o Options for categories/sub-categories
 - o Variable customization
 - o Data visualizations
- Visual elements

7. Have you ever analyzed the data within your sales and expenses? If so, what do you look for when analyzing this data?

- Look for sales that work to meet demand
- Understanding profits to meet inventory needs
- Sums of product being sold, customer total # product bought, specific item bought, type of customer, demographic, how they found out about product
- Profit margins
- Profit trajectories
- Finding best ROI for company

a. When it comes to data analysis, what methods or features do you find helpful for analyzing (ex. graphs, filters)?

- Numbers
- Graphs for visual element
 - o Weekly, monthly, yearly graphs
- Statistical analysis
 - o Mean
 - o Median
 - o Average
- Gross net profits
- Profit calculator
- Filters
- Automation
- Equations

8. Tell me about a time when these tools greatly impacted your business (whether it was for better or for worse). [OR for tools not used] What ways do you think these tools can help or hurt your business? How and why?

- Excel has kept everything for the business in track
 - o Log everything owned, sold, and purchased
- Helped discover a best-selling item (for Emily, it was 'tease')
 - o Produce based on demand
- Predict company needs
- Helps figure out pop up location to provide best customer experience
- Helps customers understand if they are liking pop ups
- Advancement in company sales
- Helps track profit and efficient money spending

Helpful features:

- Organizing inventory/expenses into categories
- Compiling weekly, monthly, and/or yearly sales reports
- Help make taxes easier
- CLOUD service rather than a downloadable program
- Allow companies to input information about their business specifically for a personalized experience (business name, est. date, links, etc.)
- Notification features

Further ideas:

- Many users use Excel; try and keep the format of TallyUP similar to Excel for familiarity and ease of usability
- Built-in invoice creating feature within the TallyUP tool
- Nice, intuitive UI
- Shipping portal
- Automation; easily enter new inventory in the tool
- Taxes