

# TallyUP

## User Research Document

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The following user research questions create the framework for discovering user needs for TallyUP. All information collected from this research further develops the scope and understanding of this application. Furthermore, each question is to be answered to the best of the interviewee's ability, meaning that the interviewee can skip if they have no answer or are not comfortable in answering said question. There are three separate sections within this questionnaire; Q1-4 includes inventory management; Q5-6 includes managing expenses; Q7 includes data analysis; and finally, Q8 is a concluding research question.

A Google Form link has also been created to collect information from users who are unavailable to attend a call-in interview. The link is listed here:

<https://forms.gle/FzXWHLg5sC9Xezoa7>

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

Google spreadsheets and 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?**

Google spreadsheet helps keep track of what shes selling, how much, and amount of stock available and if anything needs to be ordered more if needed. Profit margins. Percentages to get a gauge of what is needed for the business as well as for data analysis. Helps keep track of what sells the most, what sells the least and also keeps track of address, weight of packages.

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

“Its nice when you don’t have a website”. Helps tally things up and keep items organized. If customer has an issue with an order, it helps keep track of what batch went wrong.

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

Having to keep track of inventory. Dividing inventory by batches and notifications that tell when something is needed to be restocked/replaced. (or manual formula)

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

Alerts, more visual elements, more sub category headers instead of a whole gridsheet

**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.**

Two different spreadsheets are used, one for inventory and one for sales. Lip gloss batches subtract current inventory. Google forms automatically update customer data to sales spreadsheet. Each batch calculates sales total, cost of making, sum of each shade being sold, then uses it to calculate profit margin, total # of supplies being used. Calculate total number of lip glosses sold for the month.

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

It keeps everything organized, prevents people from being understocked or overstocked. Useful for seeing what you need, what is in demand and create according to it. Ecofriendly so she wants to make sure she doesn't over produce products.

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

Calculator on google spreadsheets

**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?**

Keep track of what she is spending, her budget. What is going in and what is going out. Keep track of how much she is spending in her business. What she can keep (profit) and what she can spend. Helps her analyze and get a gauge if she needs to raise or lessen her prices.

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

Uses profit calculator, simply takes the sum.

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

Hard part would be separating per batch. She wants it to be more customizable and choose between individual batches/sections and more sorting options

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

Variable customization for managing expenses. If excel chart can make data visualizations

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

She takes the sum of each shading being sold; customer total # shades bought. What shades are being bought, What type of customer, demographic, how they found out about the shades

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

statistical analysis; mean, median, average. Gross net profit, profit calculator. Filtering, calculators.

**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?**

She found out her best selling shade is “tease”. And she would produce based on popular shades. Helps her make more of what is in demand and less of what is not in demand. Helps her predict what she needs for the company.

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

From experience, excel sheets. Physical organization, main thing is physical product and putting them in the right area. Doing inventory late night and logging them

**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?**

Main use is for keeping track of inventory, numbers, profit margins, how much is needed to buy or sell depending on consumer demand. Data to determine sales trajectory so company can maximize profits and customer experience and know what sells, and what okay

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

It's easy access to categorize to determine quality level of items, sort through large categories to understand what's selling. What does well, what doesn't to get price listings and know what sells at what price. CATEGORIZING DATA.

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

Inventory is in and out often, and very diverse. Having diverse inventory made it very difficult using excel especially when manually inputting data. Very time consuming.

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

Automation; automating. But not sure how it would work with vintage clothes. Good predictable "assumer" that predetermines value of a certain items when it comes to used items. Output suggested price based on condition of item. Main thing is to MAXIMIZE TIME to make the most profit.

- 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.**

Place item in bag and hand it to them. To maintain customer relation, (do like returning customers) give them the product and ask if theyd like to be featured on INSTAGRAM which helps with promotion and building clientele. Also giving business card which gives further engagement with the brand so that they can contact us and come back to us and make things to work out. And also have customer relations because he often does business through the DMs so that they know the person behind the DM.

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

Mainly for efficiency for organization. Helps work with the team easier and allows someone to pick up where the person left off. If youre working with more than one person it allows the other people to pick it back up easily. Also don't get lost with trajectory and being familiar with your data to maximize sales.

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

Also use excel sheet, also uses paypal which keeps track of paypal.

- 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?**

Not gonna be able to keep track of where the money is going. So without an expense sheet we wouldn't know what tools would bought ROI (Return on investoment). Being able to know good ROIs based on what we spend money on and our profit margins. Without the data we wouldn't know how to expand the business

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

It has calculations; automates cost and easier to do math to know up or down with the business. Everyone has excel so its easy to share program with employees

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

Input management is really hard to keep track of getting data inputted efficiently. Other companies can easily scan their data but its difficult to do it manually

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

Scanning stuff, helping makes the process easier. AUTOMATION enhances the business

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

Yes, main thing is to look for profit margins and profit trajectories. Looking out for what sold well and what gives a better ROI and what are the trends for it. What season is best for sales.

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

All data being sorted can simply be in text box or excel sheet. Graphs aren't really needed for him as long as information is easily accessible and automated.

**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?**

It impacted business because it helps figure out which spaces needed to be rented out to give best customer service experience for pop ups. Helps understnadrn if customers are liking the pop ups. Helps determine how often to do pop ups or how often to post on Instagram and how many items to get and get a smooth advancement for company sales

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

Microsoft Excel

**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?**

Yes, because it can hold my inventory & my other business information that I record.

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

I can find everything for my business on there

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

Its a slow way to record inventory & finding specific older information takes awhile

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

None that he can think of

**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.**

I record it on my phone then I transfer that information to my spreadsheet



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

To know how much money they are spending & making.

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

Microsoft Excel

**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?**

Yes, I use excel because it has all my information for my business on there.

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

Everything I need for my business is in the same location.

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

Nothing

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

No

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

Yes, I look for profit margins, how he's selling items & rooms for improvement to help increase profits.

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

Just looking at numbers & making different graphs.

**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?**

When I started recording sales & my other businesses expenses on excel, it started to help me profit more & spend my money more efficiently.

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

Currently familiar with Microsoft Excel

**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?**

He has created an inventory sheet to help keep track of sales, prices, and be organized with current inventory. He also uses it to analyze prices that work and don't work.

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

The best part is being able to use sum and subtract equations which easily allow for overall total sales

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

Hard to manage monthly sales and organize inventory based on the date sold, purchased, and create notes per item cleanly

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

Features to help with organization; while he is aware it is somewhat possible to do in excel, it is still a hassle to figure out and a bit counter intuitive at some points.

**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.**

When an item is sold, he marks it on his inventory sheet with the amount sold minus shipping costs, the date, and any notes regarding the sale. He purchases a shipping label (if applicable) and ships the item out ASAP.

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

To be organized and use manage inventory easily. This helps companies know what items sell easier than others, and purchase/create inventory based on consumer demands which, in turn, helps further grow profit for the company

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

None at the moment, other than using Microsoft excel

**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?**

He does this to keep track of how much he has spent for his company. Since he is an independent owner, he needs to make sure that he is keeping track of what helps him profit and where he loses money

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

Similar to inventory management; sum and subtraction for tracking daily, monthly, or yearly sales

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

There are no ways to organize the expenses as they're just thrown into excel cells. This can sometimes be difficult to locate certain expenses. It is also hard to categorize certain expenses whether they were group purchases or not.

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

None that he can think of

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

Yes, all the time. He uses the data to look for sales that work so that he can continue selling that specific type of item. Also uses information to know how much he is profiting so that he knows what he can buy with the profits or slow down on buying

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

He thinks looking at numbers is fairly easy but it would definitely help to see visuals paired with it, maybe monthly graphs to show how profits are looking throughout the month

**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 helped greatly build the business by keeping everything in track. It lets him log everything that he currently owns so that there isn't an item that is left forgotten in his house. It had saved him many times when looking at his inventory to see what he still has in stock to sell, because without it, he may have had forgotten that he had that specific item with him