



SAP Cloud for Customer  
#beBold  
An AI-Powered CRM

SAN  
FRANCISCO  
DESIGN  
WEEK

# User Research and Personas

# Reading our users mind...

Typical questions that will help sales rep identify blockage in deal flow.

What is the probability of the opportunity closing?

Is there positive or negative activity during the deal cycle?

Has the deal status been upgraded or downgraded?

How many days to close?      What percent of commit deals have closed?

Has the close date been pushed?

Has the deal amount changed?

When it is likely to close?      Where are the risk identified?

Has the deal slipped in the past?

Considering Sales reps needs and scenarios while designing information.

I wish system can provide me recommendations that would help me close the deal faster.

It would be so helpful to see deal related important insights together in one place.

I have 1:1 with my manager tomorrow. I need to pull up all the data together from multiple place. It takes so much time!!!

I need to prioritize my deals. Which one has low score?



# Personas



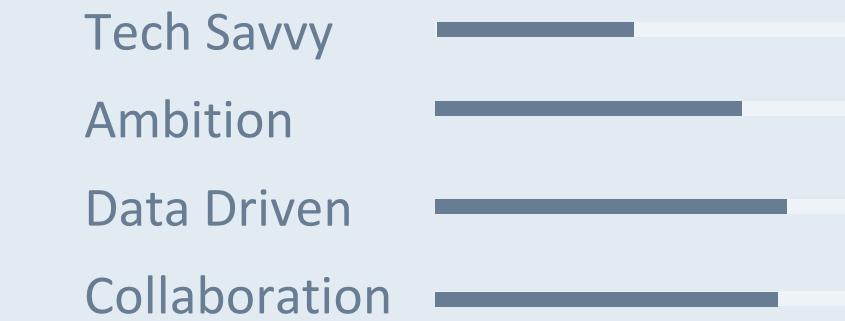
# B2B Sales Personas



**Mary Lau**  
Sales Manager

“ I think of myself as a coach for my team of sales reps and help them plan and meet their pipeline expectations with useful insights. ”

- 👤 35
- 📍 Seattle, WA
- 🎓 Master's Degree
- 🤵 Married with 2 kids
- 📱 Laptop, iPhone 7 Plus



## RESPONSIBILITIES

- Planning and guidance with sales reps, manage pipelines and expectations

## NEEDS/GOALS

- Receive quick overview to have pulse check on how the reps are doing with their deals and pipeline
- Help their reps plan for success during 1 on 1

## DAY IN THE LIFE

I'm responsible for supporting a team of 10 sales reps. My week starts out with online meetings with my team. I need to understand current trends in the industry and how our products are competing against other comparable products. By conducting such research and gathering more data on this market space, I provide recommendations on prices, deliveries, and promotions to the leadership. I also meet with sales reps on a regular basis on the road and accompany them to their visits.

## KEY CHARACTERISTICS & BEHAVIORS

- Logs in 2-3 times/week
- Mostly uses desktop and had limited travelling
- Spends time searching content related to the account
- Engages with account in an at need basis

## CHALLENGES

- Limited 360 degree view of account
- No alerts
- No active recommendations

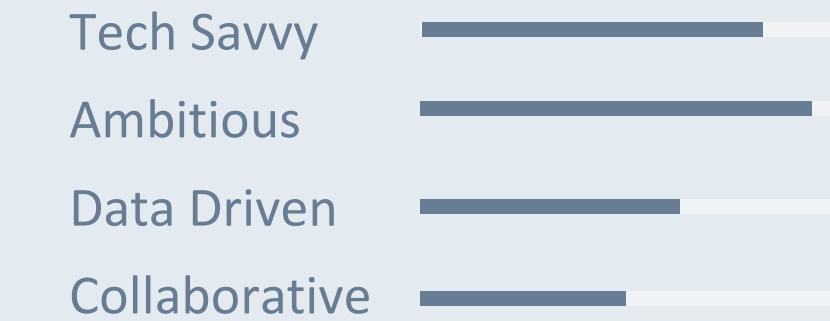
# B2B Sales Personas



**Chris Lee**  
Sales Representative

“ I focus on ensuring next steps to get closer to closing the deal, including adding the right contacts, providing relevant collateral, and setting up follow up meetings or calls. Hitting their numbers. ”

- 👤 30
- 📍 Houston, TX
- 🎓 Bachelor's Degree
- 🤵 Married, 1 Kid
- 📱 Samsung Galaxy, iPad



## RESPONSIBILITIES

- Engaging and Selling Products/Services to identified deals

## NEEDS

- Insights to best way to close deal by seeing a precedent from peers or similar past deals
- Knowing what the next steps should be and having the resources (collateral, contacts, etc) to move forward

## DAY IN THE LIFE

I spend over 60% of my time visiting customers to sell new products and upsell existing products based on sales volume. Certain days are devoted to visiting current and prospective customers in my area. I use my mobile device to look at directions to my customer visit. I'm responsible for introducing new products, sharing promotional information, and surveying the status of existing products.

## KEY CHARACTERISTICS & BEHAVIORS

- Logs in 2-3 times/day
- On-the-go at least 30% of the time
- Spends time browsing news related to account
- Engages with account at least once/week via e-mail

## CHALLENGES

- Inconvenience of managing next steps for all accounts
- No active recommendations

# Service Personas



## James Stone

Customer service agent manager

“ I work closely with my team to make sure customer tickets are closed within SLA. ”

35

Fort Lauderdale, FL

Master's Degree

Married

iPhone, iPad

Tech Savvy



Ambitious



Data Driven



Collaborative



### RESPONSIBILITIES

- Capacity Planning
- Request and Assign Resources

### NEEDS

- Need to have an real-time insight of current workload
- Need to plan ahead in order to close tickets on time.
- Need to make decisions on which tickets to act on.

### DAY IN THE LIFE

I wake up in the morning around 6:30 to prepare for my visits. Before I leave my house, I'll check today's agenda and make sure that people have confirmed their appointments with me. I visit three to four clinics on a typical day. Most of the time, I introduce new products, take orders, meet prospective and current customers, and also conduct surveys and product audits.

### KEY CHARACTERISTICS & BEHAVIORS

- Manage a team of 4 ~ 6 people on different tasks.
- Allocating resources based on current workload.
- Make decisions to prioritize tickets during peak seasons.

### CHALLENGES

- No insights on how long it may take to close current tickets.
- Passive allocating resources based on experience or gut feeling.

# Service Personas



**Amber Kincaid**  
Customer service agent

“ My goal is to improve customer satisfaction. ”

27

Boston, MA

Bachelor's Degree

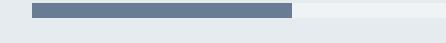
Single

iPhone, iPad

Tech Savvy



Ambitious



Data Driven



Collaborative



## RESPONSIBILITIES

- Handle tickets
- Response customer inquiries.

## NEEDS

- Need to have an estimation on how long they will spend on the particular tickets.
- Need to answer customer inquiries to give an estimated ETA

## DAY IN THE LIFE

I wake up in the morning around 6:30 to prepare for my visits. Before I leave my house, I'll check today's agenda and make sure that people have confirmed their appointments with me. I visit three to four clinics on a typical day. Most of the time, I introduce new products, take orders, meet prospective and current customers, and also conduct surveys and product audits.

## KEY CHARACTERISTICS & BEHAVIORS

- Examine incoming customer tickets every day.
- Reply customer inquiries.
- Route tickets to downstream support agent.

## CHALLENGES

- No insights on how long it may take to close current tickets.
- Reply customer ETA inquiry based on experience or gut feeling.

# SAP Sales Cloud

## Smart Features



Smart  
Insights



In-depth  
Analytics



Deal  
Coaching



Account  
360 View

# SAP Sales Cloud

## Intelligent sales with actionable insights

Help sales teams accelerate the sales cycle with machine learning driven deal insights. Focus on the deals that have a higher propensity to win and receive personalized deal and account recommendations. Sell smarter, sell faster.

The screenshot displays the SAP Sales Cloud interface, specifically the Opportunities module. The main view shows a list of opportunities with columns for Name, Account, Deal Size, Score, and Close Date. An 'Insights' overlay is open for a specific opportunity named 'New Deal at Kixo', which has an 88 Opportunity Score. The insights section includes a summary card, key factors (such as having an executive sponsor), activity scores, and a timeline. To the right, a sidebar provides 'Smart Recommendations' like adding an executive sponsor and similar deals. The top navigation bar shows the user is Michael Boone.

**Smart Recommendations**

- Improve Win Rates by adding an Executive Sponsor
- Top Deals included an Executive Sponsor during the Qualify Stage

**Similar Deals**

- New Deal at Acme Corp.
- Deal at BMC
- SmartTouch 4G Smartphone
- Key Contacts

**Details**

**RECOMMENDATION**

**NOTES**

**ACTIVITIES**

**ATTACHMENTS**

**FEED**

# SAP Service Cloud

## Smart Features



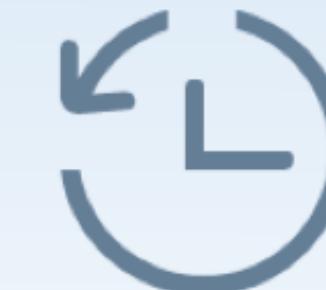
Supervisor  
Insights



Ticket  
Categorization



Conversational  
UI



Time to  
Completion

# SAP Service Cloud

## Transforming Customer Service

Revolutionize customer service centers with machine learning features that increase agent productivity and bring value to the business. With deep learning, automate ticket categorization, meet expected resolution times, and reduce number of escalations. Intelligently deliver best-in-class customer service.

The screenshot displays the SAP Service Cloud interface, featuring three main components:

- Ticket Management:** A modal window titled "63551 Bowl motor may fail soon" shows details like Priority: High, Status: Open, Assigned to: Jenny Smith, and Escalation Status: Not Escalated. It includes tabs for OVERVIEW, DETAILS, CHARTS, ACCOUNT TEAM, SALES TERRITORIES, RELATIONSHIPS, ADDRESSES, CONTACTS, and INV.
- Account Insights:** A central dashboard titled "My Accounts (213)" provides an "Opportunity Score" of 87 (Very likely to close) and an "Activity Score" of 6. It lists accounts such as California Corp, Markus, Test Jan 22, Millennium Car Comp, DSN\_ACC\_FEB1, auto\_test\_20170302, brk 1705 Acc, CPF Crop, Top Cast, Bes But - Dublin, Hamiltons, Target Corporation, Acme Pvt. Ltd., Best Buy Updated, and Lowes New York #167, along with their respective cities, states, and scores.
- Customer Responses:** A sidebar titled "Similar Tickets" lists recent interactions:
  - 89888 - Follow up call with Customer (Elaine Walsh, 04.11.2017, Completed)
  - 92489 - System not working (Jack Mason, 04.11.2017, Open)
  - 72344 - Support Needed (Michael Brown, 04.11.2017, In Progress)Below this, a section titled "Responses" shows customer messages like "The category has been set..." (Matt.Damon@email.com), "Thank you for contacting us..." (matt.damon@email.com), "Apologies for the inconvenience..." (James.Park@email.com), and "Customer, George was distraught to find that his Odessy and owned by Callaway, had begun to lose its grip. The..." (James.Park@email.com). Each message includes a CSAT score (e.g., 90, 88, 85) and a share icon.

The design and research document is available for personal review only.  
Please contact me to request access!

Send an email!



## Presenters

Yogesh Motwani

Amy He