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MEETING AGENDA

1. Client Goals and Design Question
2. Key Takeaways
3. Prototype
4. Functional System
5. Next Steps
6. Questions

TEAM ROSTER



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**Hunter
Bader**



Ana Hart



**Jimmy
Magnier**



**Lindsey
McKim**



Ben Ortt



**Camdyn
Rowlinson**



**Peter
Weidner**

CLIENT GOALS

1. Organizational system for client information.
2. Accessible tracking system of client progress.
3. Easy access to intake forms.
4. Notification system that can be set by priority and date.
5. Efficient communication between employees.
6. Accessible warehouse organizational system.
7. Have a customer v. business facing sides of the system.
8. Ability to follow up for reviews with clients.

DESIGN QUESTION

How might we improve the **organization and tracking** of the auction and move process for Green Valley Auctions?

HYPOTHESIS & STRATEGY

We believe that a system that includes both a business and customer interface will allow for effective organization and communication across gathering client information, tracking client progress, storing and locating warehouse items, as well as encouraging customer reviews.

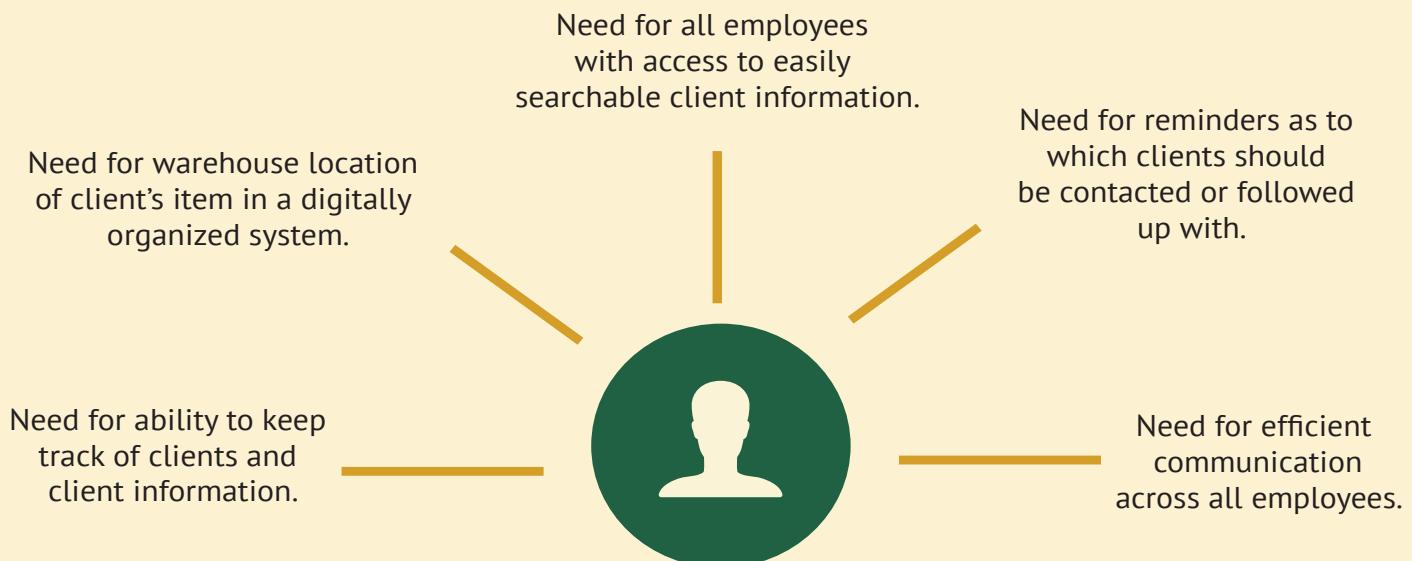
Functions such as quickly adding a new client, adding the necessary types of forms to a client's profile, uploading media, sending notifications to employees, setting reminders for said notifications, searching for client information in the database, accessing the location of an item in the warehouse, tracking a client's progress, easily scheduling a client meeting or pick-up time, and prompting the client for a review.

We conducted our research through virtually meeting with the client in order to understand their goals and aspirations for this site. After understanding what the client wanted, we created a list of questions to ask the employees at Green Valley Auctions. We conducted this research through a survey format using Google Forms and sending it out to the client and their employees. We then followed up with the client through a virtual meeting in order to conduct some follow-up questions regarding the potential system. Through this research process, we were able to get a better understanding of what our audience wants from our site.

RESEARCH QUESTIONS

1. What would make your job easier or more efficient?
2. What currently works within the system you are using?
3. What is your biggest frustration with the system that you are currently using?
4. Can you describe a bad experience that you have had directly related to a move or auction process?
5. What are other needs that this system could provide you with other than inputting client information, tracking what is needed for a move/auction, and improving overall communication?
6. What would make this organization system better?

KEY TAKEAWAYS



DESIGN REQUIREMENTS

This site should have a business facing side as well as customer facing side.

BUSINESS FACING

- This site should organize all the client information to allow employees to keep track of current auctions and moves.
- This site should notify employees when client profiles are updated to ensure an efficient work experience.
- This site should have a notification system where employees are able to set notification reminders as well as send notifications to themselves or other employees with varying levels of importance.
- This site should have a system to organize all the warehouse content using tags so that the business side can easily locate and keep track of items.
- This site should allow items to disappear from the warehouse when sold or moved.
- This site should allow for the customer account to be created as soon as a client folder is created on the business side (with login information being emailed to the client as soon as the folder is created).
- This site should allow employees to easily follow up with clients to request a review.

CUSTOMER FACING

- This site should have a 5 star rating review system to allow clients to review their experience once it's finished.
- This site should allow clients to create a profile in order for them to add photographs/ videos and answer questions regarding their move/auction items.
- The site should allow clients to track their move/auction to see progress being made.

LEAH GILBERT

Primary - Administrator

Age 46

About

Leah answers the phone, intakes scheduling requests for moves, gathers information from customers to provide the most accurate move estimate, walks customers through auction pick up process, screens incoming calls regarding auction interest, reconciles auctions, pays consignors, and keeps track of revenue.



Motivations / Goals

- Tracking system for calls and emails
- Better communication
- System that would remind employees of which clients need to be contacted and followed up with
- System with area to compile all customer information
- Customer information easily accessible through a search system

"I would like to see the new system have an area to compile all customer information and have that easily accessible."

Technology



Pain Points

- Lack of tracking with client information and progress
- Client information getting lost

This persona comprises **45%** of our target market.

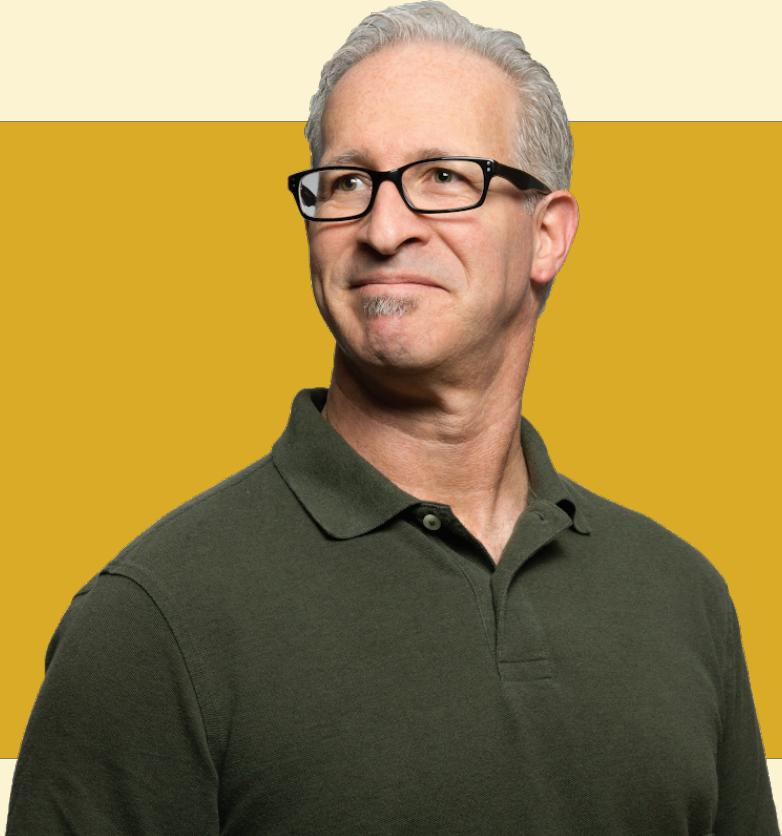
GRANT YATES

Secondary - Manager

Age 53

About

Grant is the owner, manager, and planner at Green Valley Auctions. In this role, Grant oversees all aspects of the move and auction processes. This includes pricing & scheduling moves, and evaluating estates for auction.



Motivations / Goals

- Ability to keep track of clients and client information
- Better inventory management; warehouse location of client's item into a digitally organized system

“I would like a system that would allow us to input the storage area information from the warehouse into the client’s digital file.”

Pain Points

- Losing track of client information and progress
- Miss replying to a client
- Finding and losing paperwork

Technology



This persona comprises **45%** of our target market.

BRAD FULLER

Tertiary - Mover

Age 25

About

Brad is a mover at Green Valley Auctions. In this role, Brad is responsible for looking at and understanding the reports of items that need to be picked up or moved and then going to complete the pick up or move job.



Motivations / Goals

- Access to any reports that indicate the move or pick up date, time and location for any items.

Pain Points

- Lack of easy access to reports with item move/pick up date, time, and location.
- Difficult to be on the same page with multiple employees in the office.
- Information gets lost between emails, phone calls, and in-person.

“I would love to have simple access to any item pick up / move information to make the job as efficient as possible.”

Technology



This persona comprises **10%** of our target market.

USER STORIES

While creating these personas, we relied on the research we conducted with several employees at Green Valley Auctions including Greg Evans (owner, manager, planner), Laura Cain (auction and move coordinator), Sierra Evans (marketing and advertising specialist), and Sherri Rittenhouse (office manager).

Our **PRIMARY PERSONA** is Leah Gilbert, the Administrator, as the majority of her role includes answering the phone and completing the intake form required for a new client. This role in this persona would be interacting with the system most frequently. Leah Gilbert is based heavily on our research from Laura Cain and Sherri Rittenhouse who coordinate auctions and moves as well as manage the office, respectively.

Our **SECONDARY PERSONA** is Grant Yates, the owner, manager, and planner, as the majority of his role includes pricing and scheduling moves, as well as overseeing all aspects of the move and auction processes. The role in this persona would be interacting with the system semi-frequently in order to update any information on item locations, estimates, or communicating with other employees about client information. Grant Yates is based heavily on our research from Greg Evans.

Our **TERTIARY PERSONA** is Brad Fuller, the mover. This role in the persona would not be interacting with the system as frequently; however, they will need to use it in order to be able to view reports that indicate the move or pick up date, time and location for any items in order to make the job as efficient as possible.

Through our research, we discovered that, due to the nature of Green Valley Auctions' fast-paced workflow, many employees would be using and require access to this new system. Although all three employees that we interviewed have different roles and responsibilities at Green Valley Auctions, we found that they seemed to have several common motivations, goals, and needs out of this new digital system.

- Ability to keep track of clients and client information.
- Warehouse location of client's item in a digitally organized system.
- Need for all employees with access to easily searchable client information.
- Need for reminders as to which clients should be contacted or followed up with.
- Need for efficient communication across all employees.

DESIGN INSPIRATION

GOOGLE JAMBOARDS

Google Jamboards allows users to create sticky notes to paste on a screen. It's mainly used for educational purposes for students to collaborate and engage with new content. We used the ideas for sticky notes on the dashboard to keep with the culture of Green Valley Auctions and Moves. Greg and Elizabeth said they jot a lot down on sticky notes and we wanted to implement that into the design.



FACEBOOK

Facebook Marketplace allows users to browse items being sold in the area. They can look at all items at once, or browse by category. The idea to see all items and filter by category was used for the warehouse section of the site.

DOMINOS

Dominos has a pizza tracker that allows users to see the progress of their pizza being made and delivered. The tracker is set up into distinct categories that describe where in the process the pizza is. We've used this for inspiration for tracking the client's move process.

DESIGN ELEMENTS

COLORS

#366044

#D4AB39

FFFFFF

#FBF1D4

#688B9A

#A3C586

#FFD762

#FFE086

#688B9A

#95BBCB

TYPEFACES

Quattrocento - Headings

PT Sans - Body Text

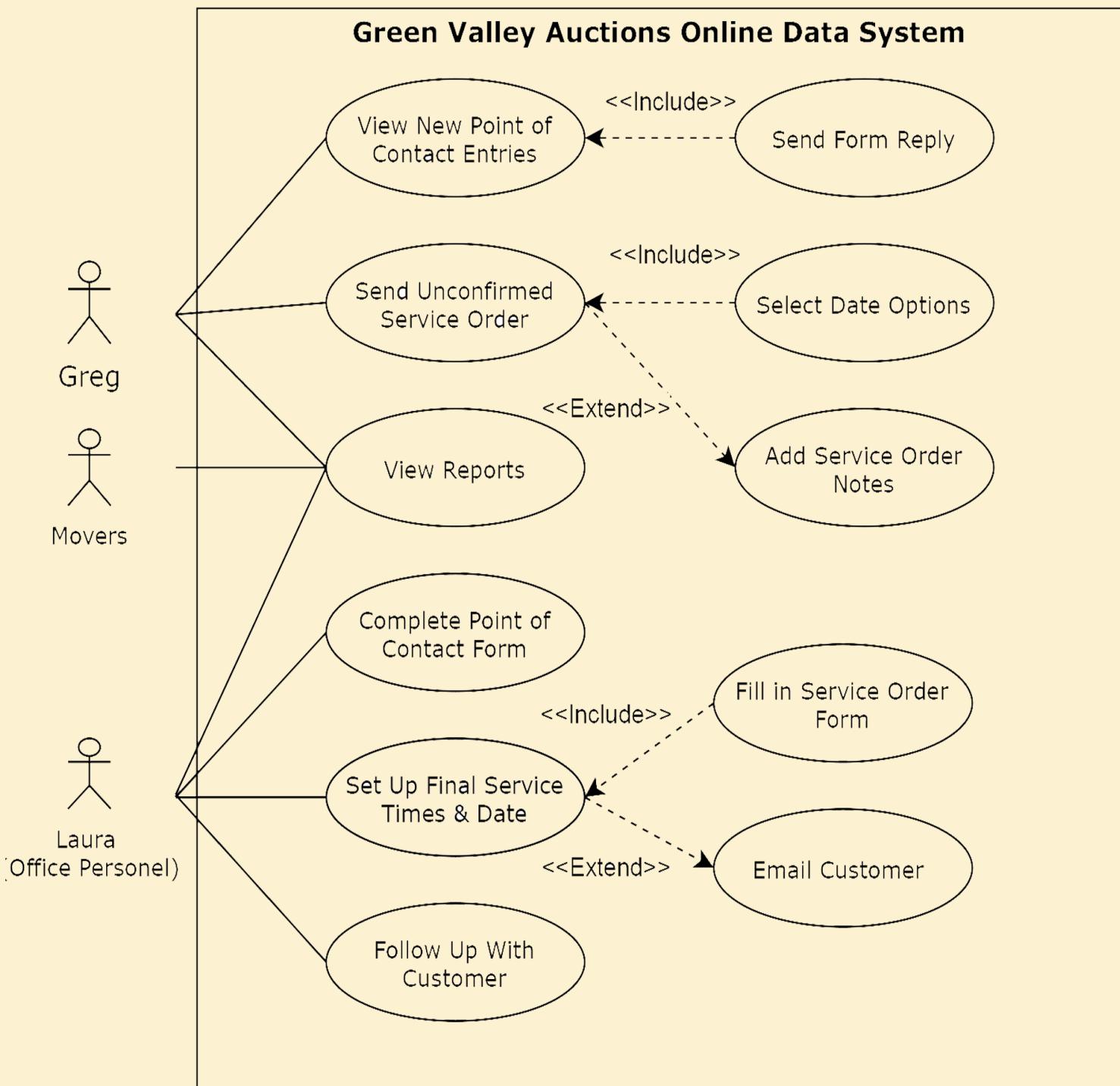
ICONOGRAPHY



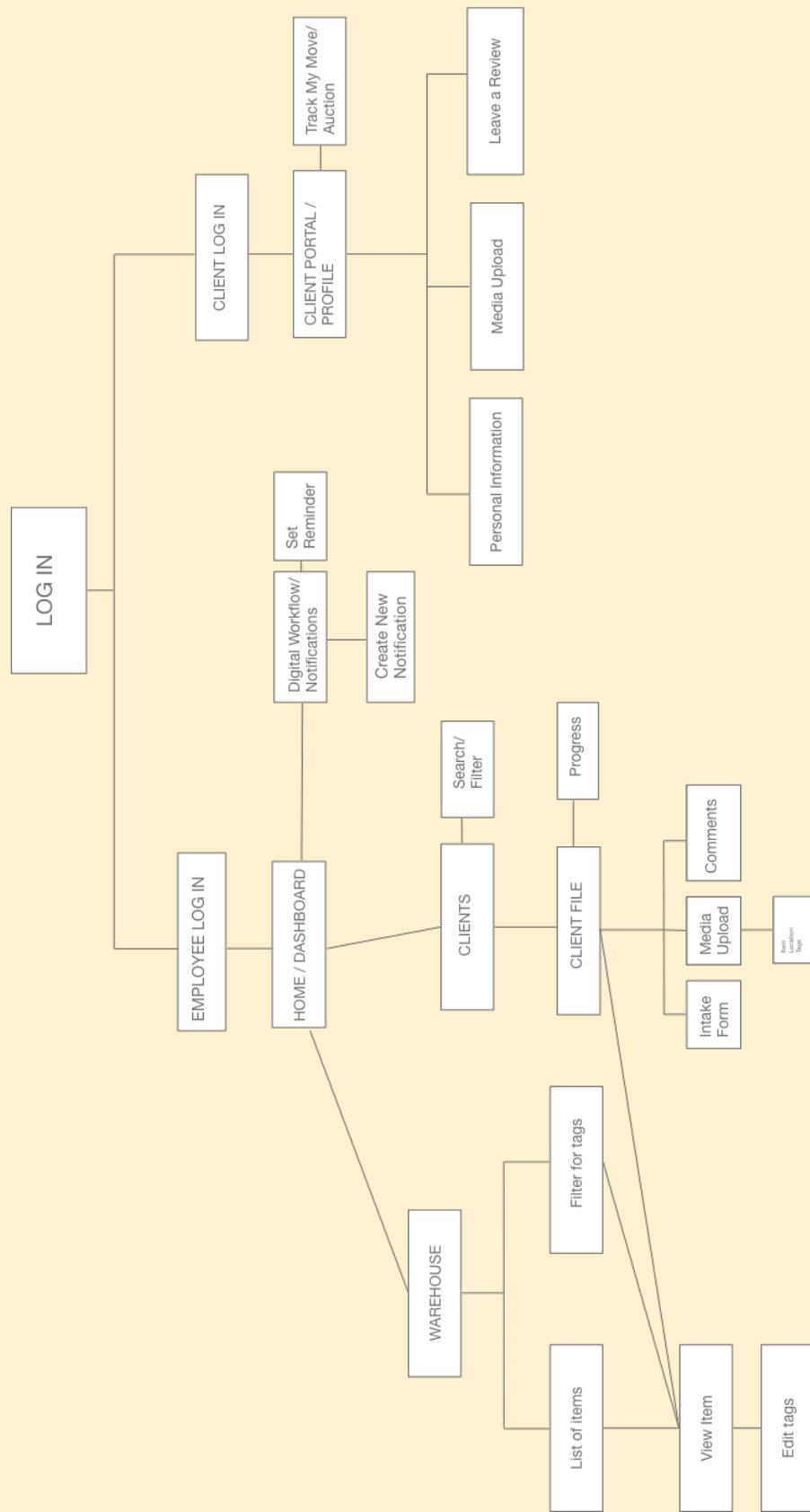
LOGOS



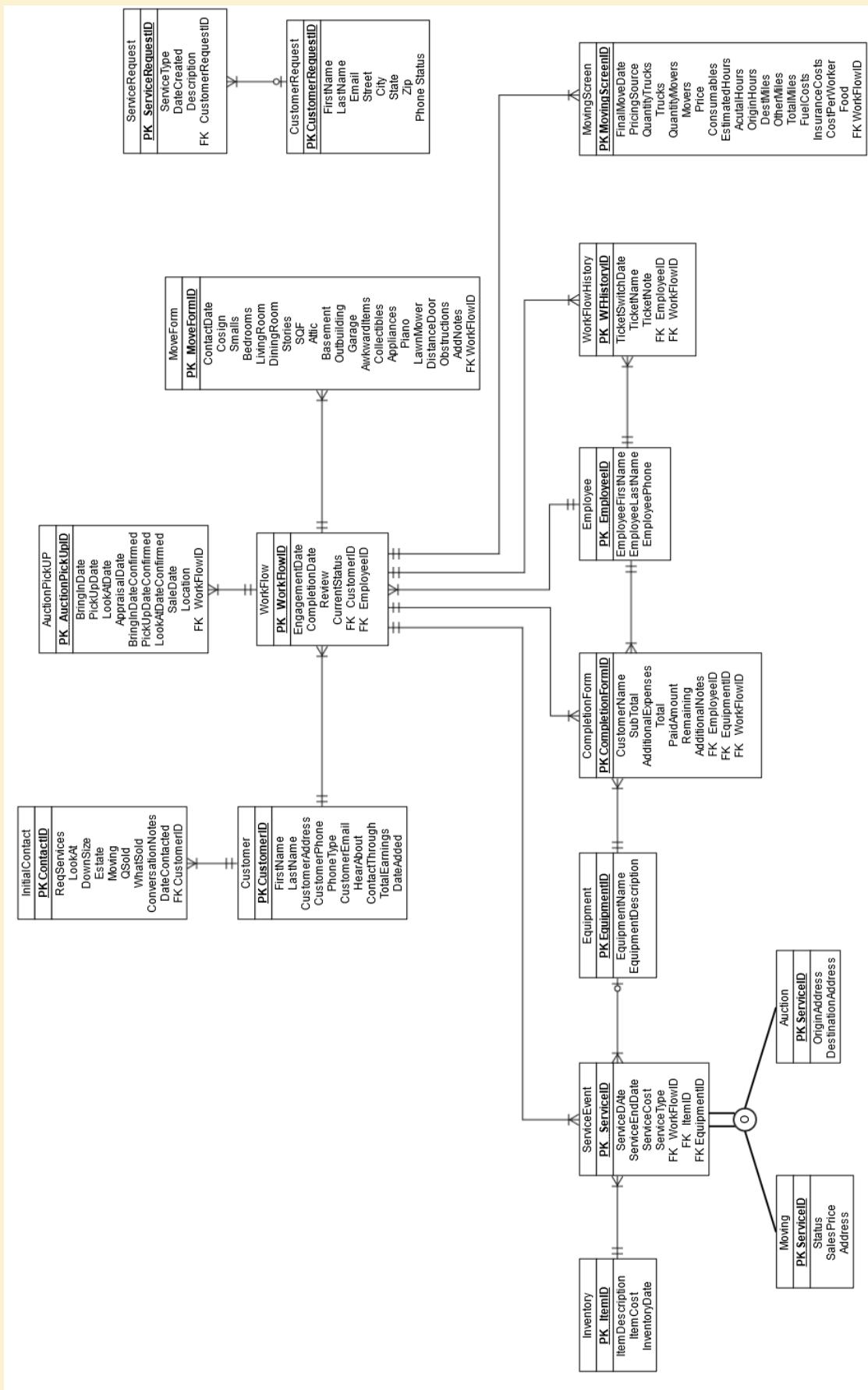
USE CASE DIAGRAM



SITE MAP



ERD



WIREFRAMES

DASHBOARD

CLIENTS WAREHOUSE

ADD CLIENT

Welcome!

Pinned Notifications

URGENT! Message from Greg...

Message from Elizabeth...

TO DO

STICKY NOTE

Type note...

ADD STICKY NOTE

CLIENT PROFILE

CLIENTS WAREHOUSE

ADD CLIENT

Client Name

Create Notification

Set Reminder

CLIENT PROGRESS: 1 2 3 4 5 6

Date Added

Address

Description of Items

IMAGE IMAGE IMAGE IMAGE IMAGE

WAREHOUSE

CLIENTS WAREHOUSE

ADD CLIENT

IMAGE IMAGE IMAGE IMAGE

Item Name	Description...	Date
Item Name	Description...	Date

ITEM VIEW

CLIENTS WAREHOUSE

ADD CLIENT

Item View

IMAGE

Item Name

Description

>Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. In mollis nunc sed id. Molesitie ac feugiat sed lectus vestibulum. Consequat mauris nunc congue nisi vitae suscipit.

Additional Tags Chair
Mid-Century Modern

Date Arrived

Estimate

[View Client Info](#)

PROTOTYPE

CLIENTS WAREHOUSE

GREEN VALLEY
AUCTIONS & MOVING

Add New Client

🔍 📅 ➔

Welcome!

Pinned Notifications

!!! Message from Greg...

Message from Elizabeth...

New Notification

Set Reminder

Set Reminder

Pending Requests:

Process Request

TO DO

- _____
- _____
- _____
- _____
- _____

STICKY NOTE ×

Type note...

+

STICKY NOTE

PROTOTYPE

[CLIENTS](#) [WAREHOUSE](#)

 GREEN VALLEY
AUCTIONS & MOVING

[Add New Client](#)   

  Stephanie James	  Ryan Jones	  Ben Hill
  Jenny Lakes	  Tyler Oaks	  Emily Williams

PROTOTYPE

[CLIENTS](#) [WAREHOUSE](#)

 GREEN VALLEY
AUCTIONS & MOVING

[Add New Client](#)   



Contact Information
Email: stephaniejames@gmail.com
Phone: 540-123-4567

[Add New Form](#)

[Initial Contact Form](#)

[Service Order Form](#)

[Auction Scheduling Form](#)

[Auction Contract](#)

[Auction Inventory](#)

Stephanie James



Client Information

Pick Up Date: 3/9/2021
Bring In Date: 3/9/2021
Look At Date: 3/10/2021
Closing Date: 3/15/2021

Comments 

Contact made on 3/2/2021, 4:00PM;
intake form complete.

Tried contacting on 3/2/2021, 8:31
AM to finish completing intake form.
-Sierra

Initial contact was made on
3/1/2021. -Laura

[Upload Media](#)

[Save Changes](#)

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PROTOTYPE

CLIENTS [WAREHOUSE](#)



Add New Client



Search / Filter Items

Item	Description	Location	Date
	Wooden Chair Hand-crafted chair	L1	3/9/21
	Antique White Chair Old antique white chair	L1	3/9/21
	Red Lamp Eclectic decorative lamp	L1	3/9/21
	Wooden Bed Frame Rustic wooden bed frame	L1	3/9/21

CLIENTS [WAREHOUSE](#)



Add New Client



[BACK](#)



ITEM VIEW

Wooden Chair

Date Arrived: 3/9/21

Description

Antique wooden chair. Purchased in 1998.
Offered for 1/4 of retail price. Height: 40"

Estimate: \$150

Location: L1

Additional Tags

Chair
Hand-crafted

[View Client Info](#)