

# Case Study

## Enterprise solution for cannabis retailers

Nicole Dupré / December 2023

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## Context

# About Treez

- Technology and insights to the cannabis industry
- 2016, launch POS solution.
- Expanded to Insights (Analytics) and Payments.
- Serving 500+ stores across 12 states, capturing 15% of the market.
- Integrated with 275+ partners (loyalty, e-commerce, fintech, etc.).
- Market shift: From small "mom & pop" shops to larger operators.



Context

HMW

**How might we simplify and enhance  
our software's user experience to  
seamlessly support retailers as they  
grow from small to large-scale  
operations?**

## My role

# Summary

In my role as the company's first designer, I was tasked to define a comprehensive UX framework, develop a robust Design System, and enhance the user experience for a multi-store, multi-state enterprise platform.

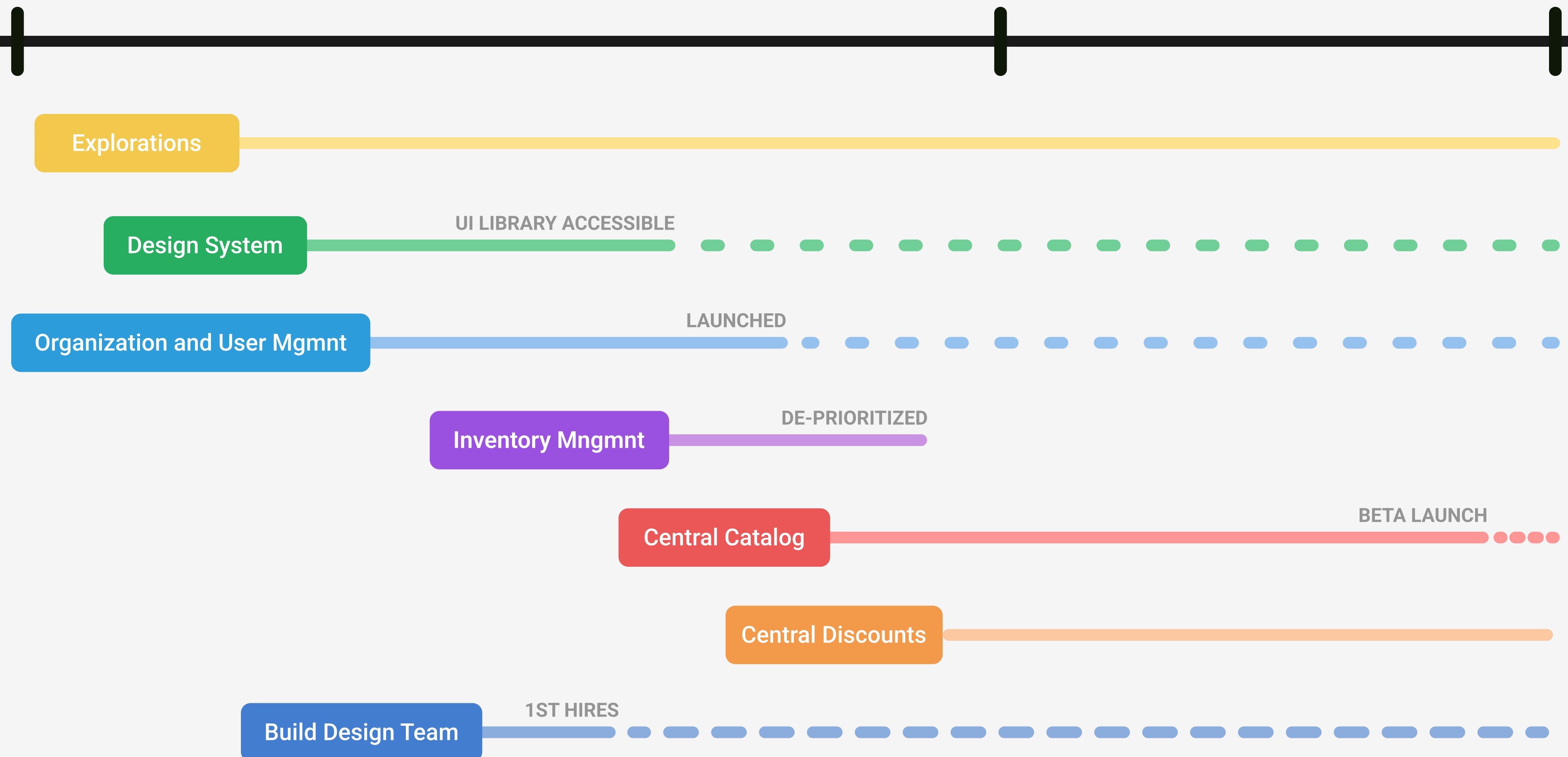


## My role

Jan '22

Jan '23

Oct '23



# Central Catalog

# Project Summary

Aligning to one of the business priorities to scale the product to target ICP of multi-store operators, Central catalog was identified as a key feature that deeply hurts at our customers at a data label, operational efficiency and profitability.

BoH - Back of the house squad  
Product Owner (1)  
Product Manager (1)  
Eng Manager (1)  
Back end /Front end (9)  
Q&A team (3)  
Marketing Manager (1)  
Delivery Manager (1)  
Executive sponsor (1)  
Implementation Manager (1)  
Customer success Manager (1)  
UX/Product Design (2)

# Discovery & Definition

# Research Findings

## Challenges in product card creation

Currently, it takes approximately 2-3 minutes to create a single product card. Most often, we depend on the brands to supply the necessary information and assets. We find it particularly challenging to obtain complete data from smaller brands.

## Search is key feature

Operators carry thousands of SKU's, each time they purchase and receive items they need to associate it with a product card. Normally searching by Brand, Category, Subcategory and Name.

## Operational redundancy

If an operator with 10 stores stocks a product in each location, they must create a separate entry for that product in every store. Additionally, if the product has different variants, each variant must also be created as an individual product in each store

## No easy way to quickly identify dupes

Effective catalog maintenance requires time spent on identifying and eliminating duplicate entries to ensure data accuracy and completeness.

## Data quality

Data quality is crucial to ensure we have high-performing product cards that provide necessary information to our consumers and staff, aiding in sales conversion. It's also essential for maintaining compliance in my stores.

## BIO

Caroline runs a **multi-store cannabis retail chain** and is in charge of creating, organizing, and maintaining the product catalog. The information around products managed here is consumed by budtenders at the POS, consumers on their eCommerce website, Weedmaps, data in AskTreez, as well as other integrations and data consumers.

She often takes product data and images from distributors / brands and copies the data into her product shells within their organization catalog. For an advanced operator, product data will live in an ERP and be brought into Treez via an integration.



## Caroline Catalog Manager

Location: Phoenix, Arizona

Age: 33 years old

Education: Bachelor degree

Module: Product Management

Primary Device: Desktop

## INTEREST

- Know what tasks to do for the day
- Knowing popular brands and best sellers
- Organized menus and collections
- Product card performance related with sales
- Suggestions for potential collections or product lines
- Brand updates

## NEEDS & GOALS

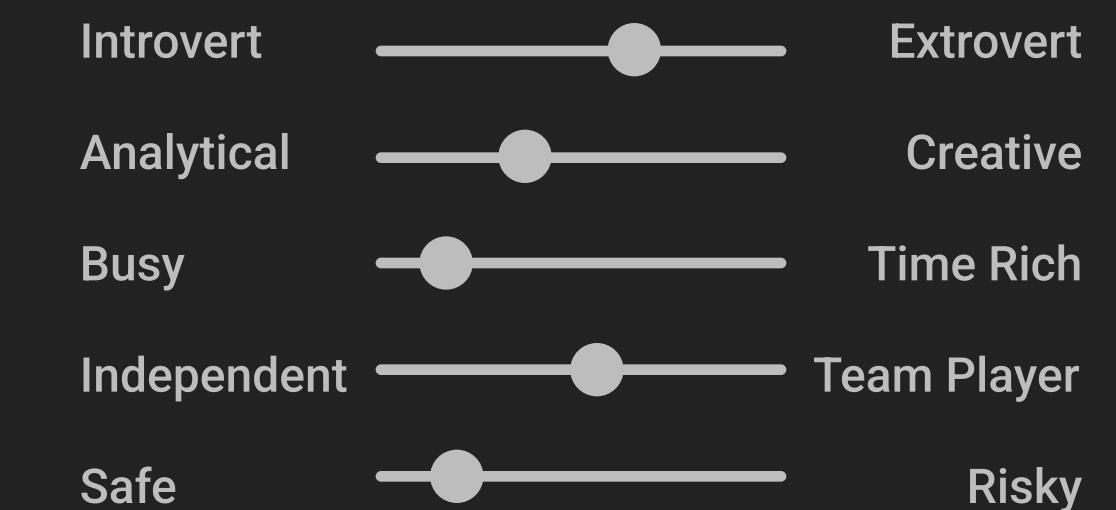
- An easy way to manage information on hundreds of products
- Educating budtenders on new products and brands
- Know how many duplicates exist
- Anticipate what are my action steps
- Keep my data clean
- Manage products in one place, one tool

## PAIN POINTS

- No idea how many duplicates exist
- Repetitive actions
- Hard to keep up with so many product shells
- Managing product duplicates is time-consuming and a manual process
- Inconsistent in-store and ecom experience
- No clue which products lack images, descriptions, etc.

**“ I need a way to easily create and maintain product shells to keep my budtender’s educated and up to date about our offer and keep inventory stocked with hot products I know consumers will love.**

## Personality



## Discovery & Definition

If Caroline needs to create products...

- Across **10 stores**
- Carries **1,000 products** per store
- Each product has **3 variants**
- Takes **3 minutes on average** to create each variant as separate products

**90,000 min. / 1,500 hrs. / 187.5 days**

## Discovery & Definition

Focus of this workstream

Project objective

**Reduce the amount of time that takes  
to add a product across locations.**

# Product goals

## Streamline the creation and eliminate redundancy

Consider the creation of a centralized catalog were the data model consider 1 card used by all stores.

## Support to gather quality data/create selling product cards

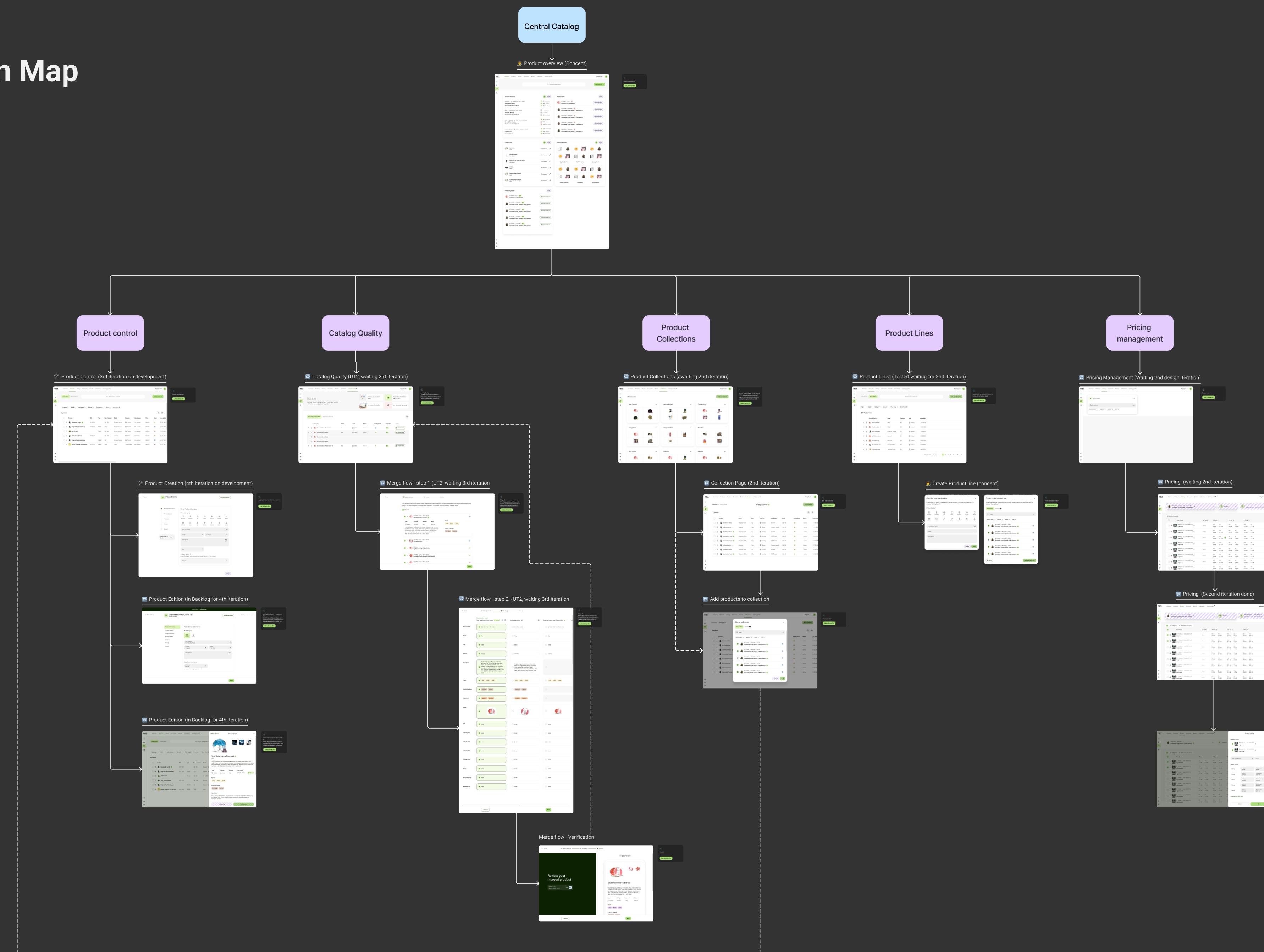
Present the form in a user friendly way, taking in consideration cognitive load, information aid, visual signifiers/gamification

## Make visible the health/quality of the catalog

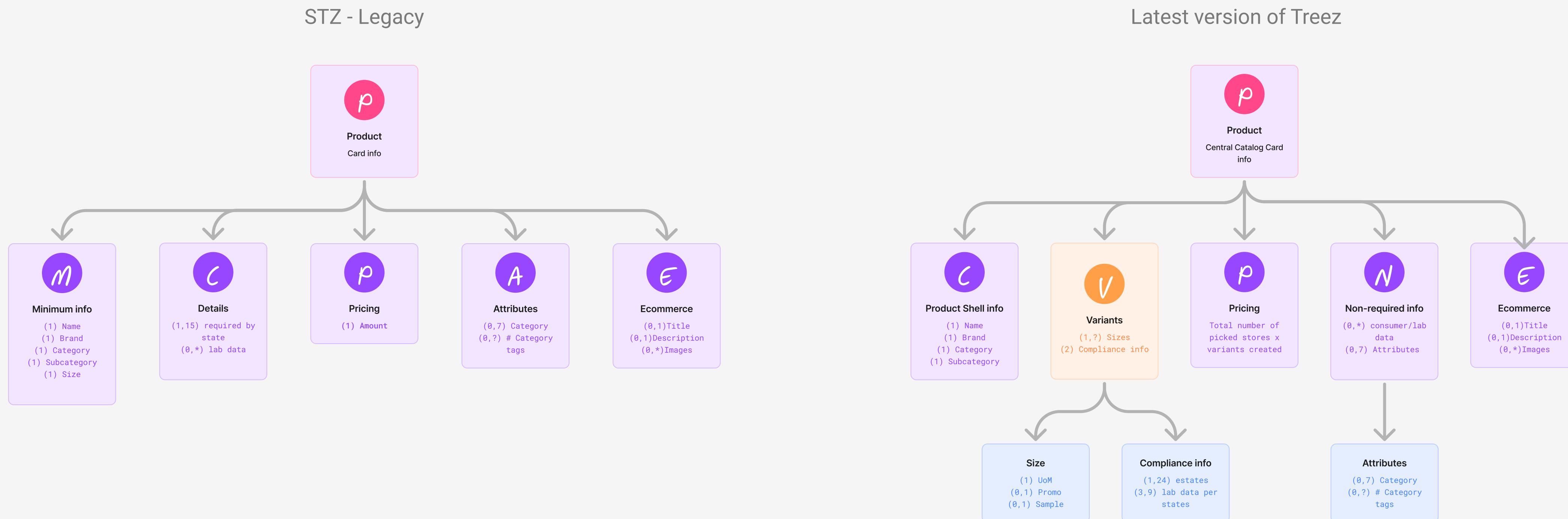
Help user clean and improve the data by reducing duplicates and low performing product cards

# Ideation, prototyping and Testing

# Navigation Map



# Product card data per section according to creation and edit flows



# Step 1 - Core product information

Previous Iterations

4th iteration (Post MVP)

Save & Close  Product name Product Preview ✓ Changes have been saved

Product information

Variants

Attributes

Pricing

Images

Parent product information

Select prproduct category\*

BEVERAGE CATALOGUE EDIBLE EXTRACT FLOWER MERCH MISC

NON-INV PILL PLANT PREROLL TINCTURE TOPICAL

Product name\* Placeholder

Sub-category\* Placeholder Brand\* Placeholder

Description Placeholder

Classification Placeholder Strain Placeholder

Extraction Method Placeholder Unit of measure (UoM)\* Placeholder

This field will autocomplete upon category selection

Fields marked with an asterisk (\*) are required to activate your product. You can save the product as a draft, but you won't be able to activate unless these fields are completed.

Cancel Add variant

Wireframes - 1st iteration

CREATE A NEW PRODUCT

Parent Product Information

Select Product Type\* Placeholder

Product Name\* Placeholder

Sub-type\* Placeholder Brand\* Placeholder

Product Variants

This product has variants like amount, flavor, or sample  Placeholder

SUGGESTED VARIANTS Placeholder

Amount Placeholder

Items Placeholder

EDIT

2nd iteration

Save & Close  Product Preview Placeholder ✓ Changes have been saved

Product information

Parent Product Information

Product category\* Placeholder

Product name Placeholder

Sub-category\* Placeholder Brand\* Placeholder

Description Placeholder

Classification Placeholder Strain Placeholder

Extraction Method Placeholder Unit of measure (UoM)\* Placeholder

Prepack Placeholder

3 similar matches in the catalog Placeholder

Granddaddy Purple, Haze Inc. Placeholder

Drama Pharmaceuticals Placeholder

Granddaddy Blue Placeholder

Granddaddy Orange Placeholder

Granddaddy Levy Placeholder

Cancel Add variant

3rd iteration (MVP)

Save & Close  Product name Placeholder Product Preview Placeholder ✓ Changes have been saved

Product information

Parent Product Information

Product category\* Placeholder

Product name\* Placeholder

Sub-category\* Placeholder Brand\* Placeholder

Description Placeholder

Amount\* Placeholder Required field

THC mg per Dose\* Placeholder Required field

CBD mg per Dose\* Placeholder Required field

Classification Placeholder Strain Placeholder

Cancel Add variant

## Step 2- Variants

## Previous Iterations

### 4th iteration (Post MVP)

Save & Close

**Pineapple Jalapeño**  
Beverage, Social Tonic, by Cann

Product Preview

✓ Changes have been saved

Product information

Variants (Selected)

Attributes

Pricing

Images

**12 pack** Promo Sample

Delete

**Variant details**

Total mg THC*	24 mg	Total mg CBD	48 mg
Doses	12	Net Weight (fl oz)	96

**SKU**

+ Add SKU

Use external ID

**E-commerce Menu Information** Hide from menu ⓘ

E-commerce Menu Title: Lemon Lavender Social Elixir

Use global description

Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. In a erat sit amet orci consectetur ullamcorper. Quisque ullamcorper pharetra lacus quis finibus. Vestibulum dignissim justo non lectus malaite

**Samples and Promos**

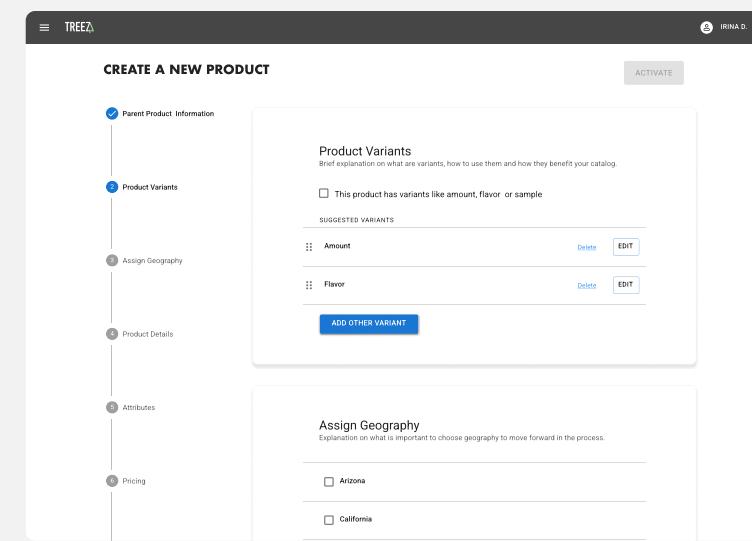
Add a sample item for this variant ⓘ

A variant with the type "Sample" will be added to your catalog, you can choose to show it or hide it from the menu independently from the main variant and add unique SKU's.

**Menu settings** Hide from menu ⓘ

Cancel Add variant

### Wireframes - 1st iteration



### 2nd iteration

Save & Close

**Granddaddy Purple** Pre-pack, Chakra Pharmaceuticals

Product Preview

Changes have been saved

Product information

Variants (Selected)

Attributes

Pricing

Images

**Product Size/Amount** Enter one or multiple size / amount variants for this product (12 pack, 100 ml)

Size	1g x 1% x
------	-----------

**SKU** 1.2

Next

### 3rd iteration (MVP)

Save & Close

**Pineapple Jalapeño** Beverage, Social Tonic, by Cann

Product Preview

✓ Changes have been saved

Variant creation

Product variants allow multiple variants under one product. Example: An olive oil with options like 6 pack or 12 pack, same container, different sizes and prices. Manage with one product sheet for easy cataloging.

Add the sizes you will be carrying for this product

+ Add Variant

**Variants available**

**6 pack**

**Variant details**

Total mg THC*	24 mg	Total mg CBD	48 mg
Doses	12	Net Weight (fl oz)	96

**SKU**

Add SKU

Use external ID

**E-commerce Menu Information** Hide from menu ⓘ

E-commerce Menu Title: Lemon Lavender Social Elixir

Use global description

Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. In a erat sit amet orci consectetur ullamcorper. Quisque ullamcorper pharetra lacus quis finibus. Vestibulum dignissim justo non lectus malaite

**12 pack**

**24 pack**

Product Information

Save and close Next

# Product card

## Product details

This product is deactivated — [Activate](#)



FLOWER • PRE-PACKED • PACIFIC STONE • HYBRID • 805 GLUE

### 805 Glue Hybrid

**Global Description**

Afternoon Delight cannabis flower preroll: expertly crafted with premium strains, ground and rolled to perfection. Delivers smooth, flavorful smoke with enticing aroma. Elevate your senses and experience euphoria. Unforgettable journey awaits.

**Variants**

Variant	Price	SKU
3.5 Gram	\$ 20.00 - \$23.00	1/8 Oz SKU 5...678, H...69H
7 Gram	\$ 40.00 - \$423.00	1/4 Oz SKU 5...678, H...69H
Sample 7 Gram	\$ 0.00	1/4 Oz SKU 5...678, H...69H
14 Gram	\$ 80.00 - \$83.00	1/2 Oz SKU 7...Hg8, H...Ijk, G...ghB
Sample 14 Gram	\$ 1.00	1/2 Oz SKU 7...Hg8, H...Ijk, G...ghB

**Aroma**

Sweet flower Woody Pine Fruity Citric

**Effects**

[Edit product](#) [Activate product](#)

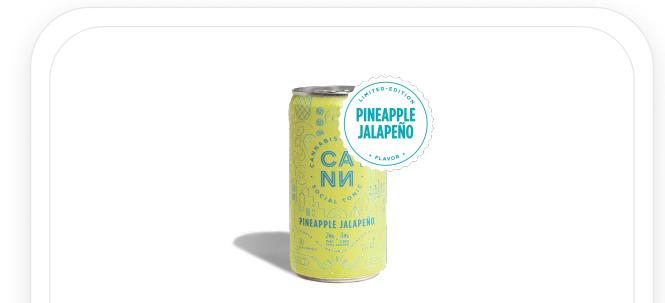
## Creation preview

Editing product — [See history log](#)

Pineapple Jalapeño Beverage, Social Tonic, by Cann

Changes have been saved

Preview



Check out your new product!

Your product has the minimum required information in order to be activated. You can take it to the next level by completing the information in following steps

Attributes Add attributes →

Pricing Add retail price for your variants →

Images Add more images →

Activate Save and close

## E-commerce view

GARDEN of EDEN® Shop Club Eden Events Discounts 2 What are you looking for? Welcome Nicole

Pineapple Jalapeño

Verified

BEVERAGE • TONIC • CANN • HYBRID

**Pineapple Jalapeño**

4.6 / 5 ★ ★ ★ ★ ★

Tropical, warm, and just a touch spicy, Pineapple Jalapeño will help you find your beach (even if you can't fly to it right now). This limited edition flavor is a party starter, so don't miss out on the fun.  
2mg of THC & 4mg of CBD in each can

Select size

6 PACK 12 MG THC 6.8 Fl Oz 12 PACK 24 MG THC 6.8 Fl Oz 24 PACK 48 MG THC 6.8 Fl Oz 36 PACK 72 MG THC 1.7 Fl Oz

**\$ 129.95** \$ 20.00 ▶ 25% Off

Select quantity

Add to cart

Effects

Happy Euphoric Relaxed Relaxed

Flavor

Jalapeño Pineapple

Ingredients

Cannabis extract Agave nectar Carbonated water Pineapple juice Natural jalapeño flavor Lime Juice

Customer Reviews

VIEW BY Size Date of review Date of review See all 125 reviews

Arman Rokni 1 day ago Verified purchase

4.6 / 5 ★ ★ ★ ★ ★ 80% of users reviews

Reported effects Relaxed Happy "Love this flavour - it has a nice little kick of spice and goes down smooth with a beautiful pineapple finish"

# Dashboard

## Nested view

The screenshot shows the Product Control section of the dashboard. The top navigation bar includes the TREEZ logo, 'Product Control', 'Pricing Management', and a user icon. Below the navigation is a breadcrumb trail: Catalog > Product Control. A prominent green button labeled 'Add Product' is located in the top right corner. On the left, there's a sidebar with icons for Home, Catalog, Product Control, and Settings. The main content area displays a table with 9999 items. The columns are: Product, SKU, Type, Size / Amount, Brand, Category, Subcategory, and Base Price. The table lists various products like 'Original TranWreck Maxx' and 'AC/DC CBD' with their respective details. At the bottom, there are pagination controls showing page 1 of 30.

## Itemized view

The screenshot shows the Product Control section of the dashboard in Itemized view mode. The layout is identical to the Nested view screenshot, with the same navigation bar, breadcrumb trail, and sidebar. The main difference is the table structure. In Itemized view, the table includes additional columns: Price and Status. The table lists the same products as the Nested view, with more detailed information per row. The bottom of the screen features a navigation bar with icons for Home, Catalog, Product Control, and Settings, along with a page number indicator showing page 1 of 30.

# What is the MVP to provide value?

## First release

- Creation of a central product shell
- Integration of variants
- Promo items and sample items
- Base pricing
- Pricing management
- Statuses: Draft, Active, Deactivated
- History log
- Import tool

## Future releases

- Catalog manager inventory landing dashboard
- Catalog quality
- Product rating
- Duplicate recognition
- Merge functionality

# What is the MVP of a Verified Catalog?

## Data

- Curated information
- 5000 top performing SKU's in CA
- Images as the data that is most difficult for retailers to obtain and showcase with consistent aesthetics

## Format

- Import Excel
- Png/Jpg images
- No UI

# What is the business impact?

Ensuring data accuracy and reliability, empowering retailers with a trusted master database, elevating the shopping experience across states. This work led to a strategic partner with one of the two state compliance systems MTRC, eliminating the need for time-consuming data uploads and maintenance across the supply chain. This initiative sets new data integrity standards and drives efficiency, innovation and leadership in the cannabis industry.

# Success Metric

**Caroline creates “product shells” with variants**

- In 1 central catalog
- for 1,000 products across stores
- Adds 3 variants to each product
- Takes max 30 secs to add each

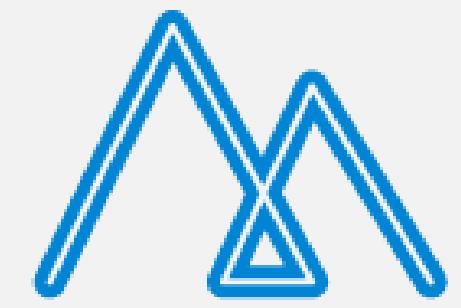
**4,500 min. / 75 hrs. / 9.3 days**

↙ 95%

# What would I've done different?

- Initiate a collaborative approach by **integrating the design team with the Catalog Engineering team** right from the project's inception.
- More Low-Fidelity / wireframe iterations **focusing on de data**.
- Establish a dedicated “Customer Guild” – a group of select users who **provide regular feedback** throughout the product development process

# Thanks :)



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