

coolshop

The cool side of technology



Nice to meet you

Agenda

- ◆ **Coolshop** - Who we are
- ◆ **Project Management Approach** - The Coolshop way
- ◆ **A real example** - CNHi Sales App
- ◆ **Opportunities**
- ◆ **Q&A**

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SHIELD



Jessica

jessica@coolshop.it

- Università degli Studi di Torino - Master's Degree in Psychology - Psychotherapy specialize
- In Coolshop since 2018
- HR Recruiter Specialist IT-ICT (Shield)
- Skilled on the human side, focused on valorizing and protecting the CoolPeople



HERO



Alessandro

alessandro@coolshop.it

- Politecnico di Torino - Master's Degree in Computer Engineering
- In Coolshop since 2013
- Technical Leader (Hero)
- Highly skilled on the technical side
- Hero on different projects with different customers

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PALADIN



Mirco

mirco@coolshop.it

- Politecnico di Torino - Master's Degree in Engineering Management
- In Coolshop since 2017
- Experienced Project Manager (Paladin)
- Skilled on the project and team management.
- Project Manager on different projects with different customers; CNHi, Caterpillar, Sidel,...



HERO



Stefano

stefano.raino@coolshop.it

- Politecnico di Torino - Master's Degree in Computer Engineering (in progress)
- In Coolshop since September 2022
- Junior Coder (Hero)
- Skilled in developing web applications with different technological stacks

Proudly from Torino, **with a worldwide vision**

Technology is cool. It shapes the world and improves our way of living.

Our aim is to bring a wave of positive tech change into the enterprise - the Cool Side of technology!

Born in 2010, we leverage our country's world renowned talents in creativity and design, writing cutting edge code.
In 2015 we founded a new branch in Rotterdam, in 2018 Coolshop Inc. in Chicago and in 2019 in Dubai.



TORINO



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CHICAGO



DUBAI



We are really good at the two critical ingredients of an **awesome User eXperience**:

Front end **Design**

Simple, fun to use applications.
Consumer grade also for B2B

Design begins with User eXperience, so app are developed around usage patterns. Data driven design cycles

Backend **Integrations**

Access to Enterprise data in a secure reliable and flexible way make an app worth using.

We have experience integrating all the major systems, such as ERP, CRM, CPQ, AI, BI and can easily build new connectors.

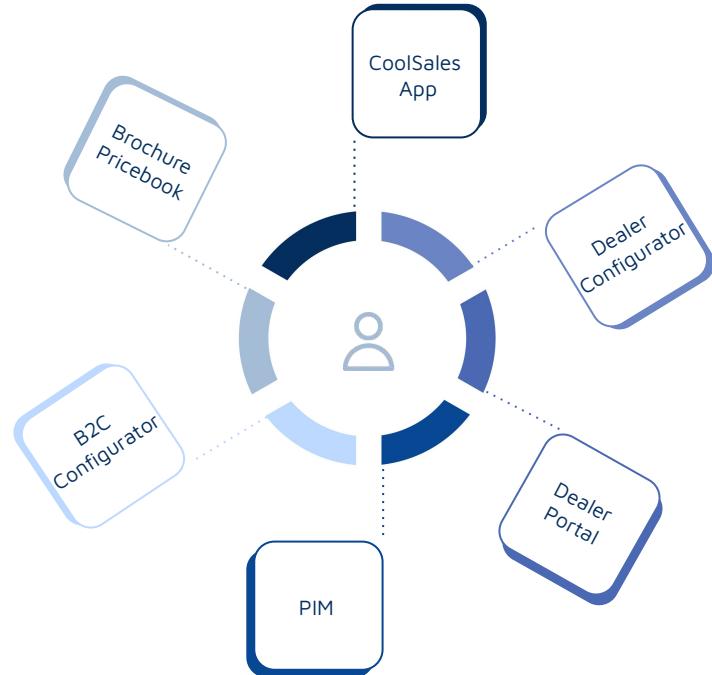
Our Focus: Extended sales process

In Coolshop we believe manufacturers put a lot of effort in defining their products features and selling points, and **our mission** is to make sure 100% of **that value is delivered to the buyer**.

Solution based selling is hard, it requires integration with multiple data sources and deep product knowledge. Our solution integrates those data with salesmen insights and best practices to maximize efficiency.

We have experience enhancing the public facing **lead generation** process, all in one **sales support app** with **configurators** - based on the **Configit** product line - and Product Information Managers (PIM) to deliver all the value you create in any sales environment.

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Some of the customers we helped make Cool Apps



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Project Organizations

Coolshop Structure

- Coolshop counts on 97 resources divided into delivery teams
- Each team consists of **4 to 18 members**
- We proudly grow resources through internal training
- **No heavy commercial structure**
- **High quality delivery with small overhead**

Key Players

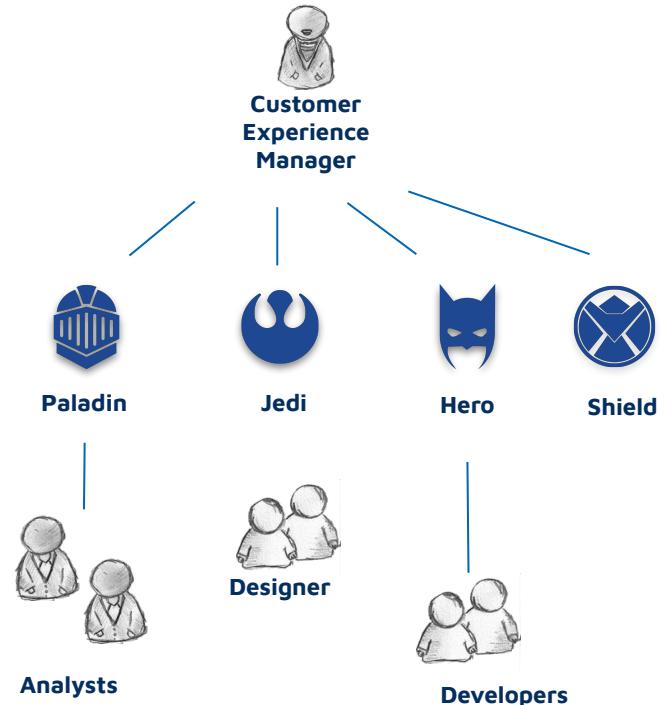
Customer Experience Manager: He guarantees compelling quality standard in the delivery and he is engaged in case of escalation in Steering Committee.

Business Paladin (Lead Business Analyst): (S)He is the business pillar, the standard-bearer of the customer needs

Project Hero (Lead Developer): (S)He bravely achieves the project completion following an agile approach. (S)He leads the Developers as a focal point for Coolshop customer's ICT Dept

UX Jedi (Designer): (S)He is the master of design force and leads the UX definition. (S)He collects inputs cross industries to provide best in class solutions.

HR Shield: (S)He is the Coolshop backbone. (S)He manage internal processes to grow the CoolFactor and protect the CoolPeople



Project Management Approach

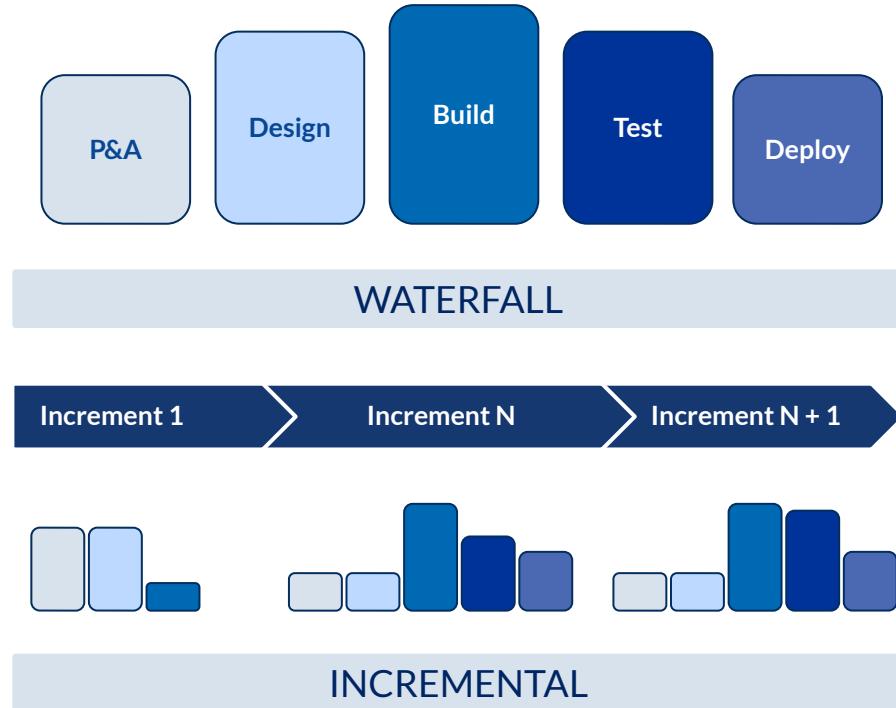
Delivery Approach

Semi-agile

To manage the project releases, solution enhancements and application maintenance, we are adopting a *semi-agile* approach. A mix of “**agile**” & “**waterfall**”.

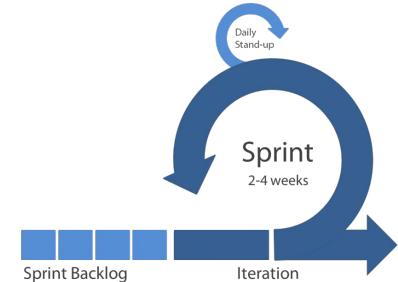
Agile will be adopted to implement the use cases and processes connected to the Client where we master the E2E and the business logic.

Waterfall will be adopted to develop processes and functionalities for which integration with other systems are needed.



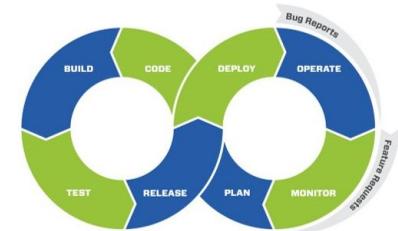
A virtuous loop every sprint

- ◆ **Preliminary Visuals validation** - XD / PPT / PDF approved by Client
- ◆ **Functional design** approved for each **sprint** - **possible visual integration & fine tuning**
- ◆ **Experience/UI Validation on browser by Jedi**
- ◆ Functional team (paladin) double check and internal approval **before release in Testing**
- ◆ **Client Team UAT and approval**



The goals of DevOps span the entire delivery pipeline.

- ◆ Improved deployment frequency (continuous integration / continuous deployment)
- ◆ **Faster time to market;**
- ◆ **Lower failure rate** of new releases;
- ◆ Shortened lead time between fixes; faster mean time to recovery (in the event of a new release crashing or otherwise disabling the current system).

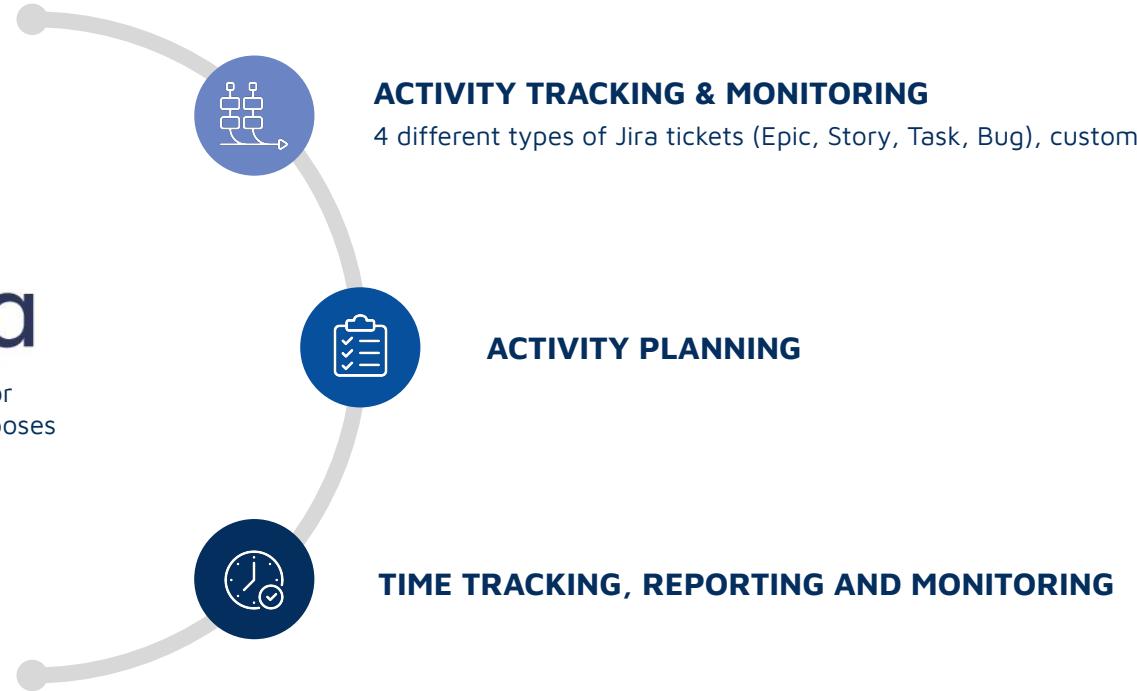


Sales App

Jira



Jira tool is used for
the following purposes



Case History - CNHi Sales App

Coolshop Credentials in CNHi



Coolshop has collected **in the last 8 years** experience with **AG and CE brands** cross regions on retail configurator and dealer applications - **eQ Sales** - and the Remarketing and Pricebooks projects.



Sales App

Project Context

CNH Industrial (CNHi) designs, produces, and sells:

- agricultural machinery, AG, and construction equipment, CE, (**Case IH** and **New Holland** brand families)
- trucks, commercial vehicles, buses, and special vehicles (**Iveco**)
- powertrains for industrial and marine applications (**FPT Industrial**).

There are two main group of actors involved in the project:

- **ICT**: the "IT" department
- **Business**: people managing the business processes

Original project goal: create a unique system (convergence) for AG&CE and IVECO. The system should be the only entry point for both CRM and CPQ activities.

Sales App Overview

CRM & CPQ convergence



Enhancing the comprehension of SalesApp's interface

INTRO

This aim is to provide a **support for the comprehension of the design criterias** that have driven the interface composition and product behaviors.

We are presenting what has been considered for designing the new Salesapp, from the **Users analysis** to the adaptable **structure** of the interface, **visual elements and how these are used**.

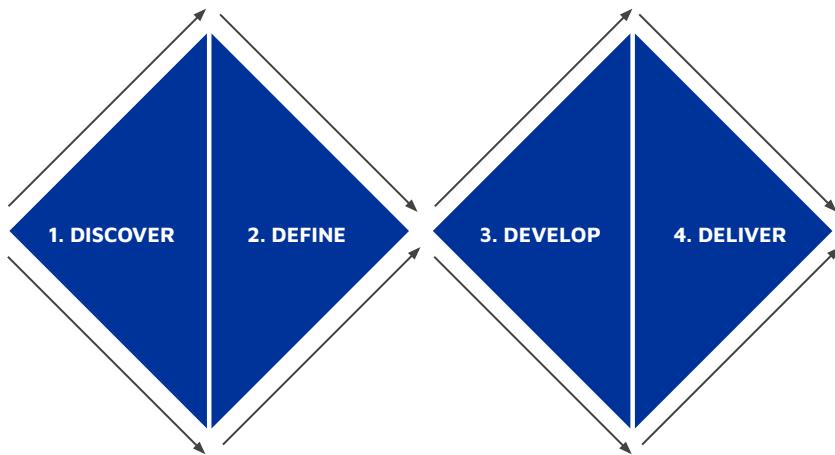
The Design Thinking approach

Change is not a moment, it's a process

"**Design thinking** is a human-centered approach to innovation that draws from the designer's toolkit to integrate **the needs of people, the possibilities of technology, and the requirements for business success.**"

Tim Brown - CEO IDEO

Double Diamond Process



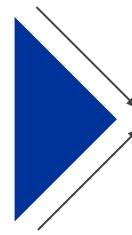
The first diamond is to define the problems that must be solved: **Designing the right things**.

The second one is to deliver the most feasible solutions: **Designing the things right**.



1. Discover

Preliminary research activity to discover pain points.



2. Define

Mapping the problems that must be solved and generate design brief that must be accomplished.



3. Develop

Ideate solutions with different levels of complexity and feasibility.

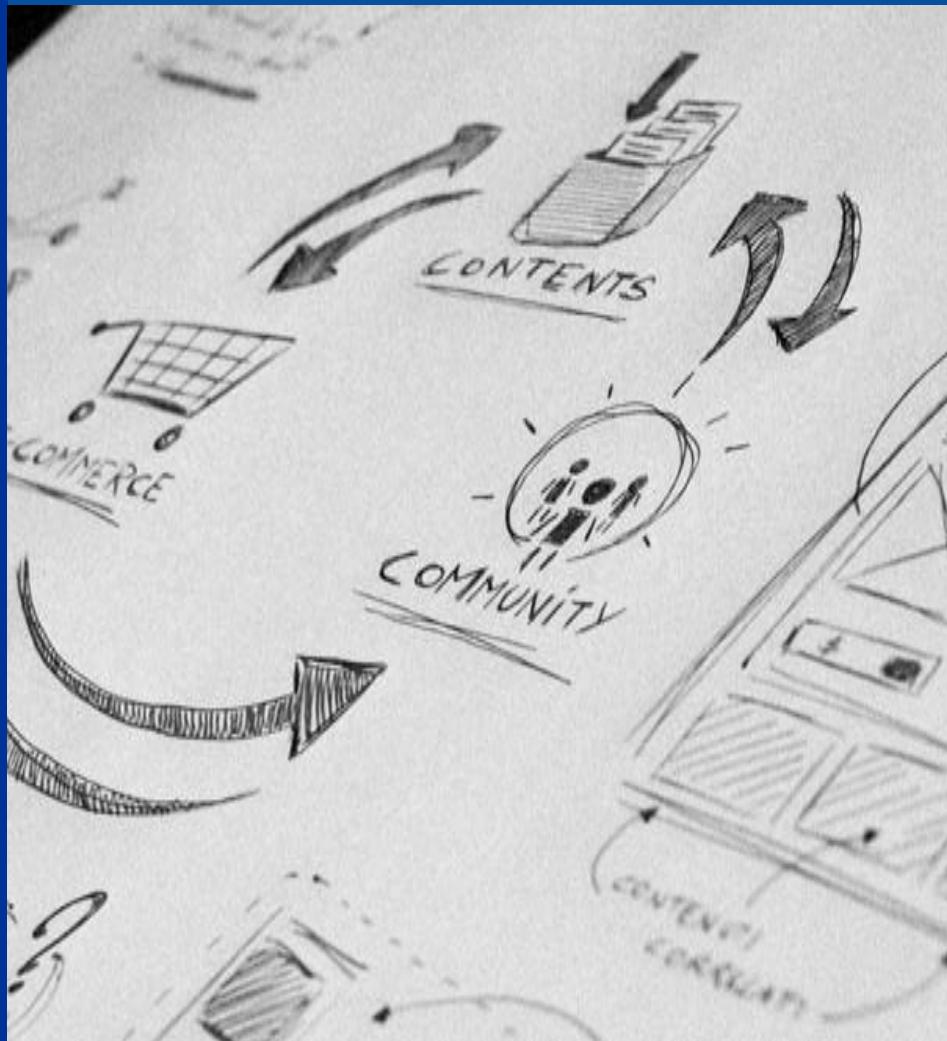


4. Deliver

Deliver the best feasible solution.

Sales App

1. Discover



Sales App

UI & UX Analysis

We designed Sales App User Interface (UI) and User Experience (UX) to create the most user friendly application as possible.

In the design phase we took in consideration different elements:

- ◆ **Main focus** on data driven design based on eQ Sales application usage analysis
- ◆ UI & UX best practices
- ◆ Business requirements



eQ Sales

Data driven analysis

We used **eQ Sales** analytics as a starting point to gather insights on how the users interacts with the application.

This data driven approach allowed us to evaluate different aspects of eQ Sales:

- ◆ Which functionalities are used the most
- ◆ Behaviour flows while using the application
- ◆ Which pages are visited the most

We developed the Sales App UI & UX taking in consideration all the insights obtained from the analysis.

We analysed the application usage in the period from 1st January 2018 to 30th September 2018.

UI & UX Best Practices

We have several years of experience with good UI & UX design: in these years we defined and collected some **Best Practices**.

It is not easy to identify concepts that are always true and applicable, but it is absolutely possible to define rules that helps to create a user friendly application:

- ◆ Interaction
- ◆ Consistency
- ◆ Focused
- ◆ Safe
- ◆ Expert vs basic mode
- ◆ Adaptive / Responsive

The above points are some of the key elements to design great User Interfaces and User Experiences.

Best Practices Interaction

According to the usage of Sales App, where the main device will be the tablet; the placement of elements and their design has been designed considering how users interact with this device.



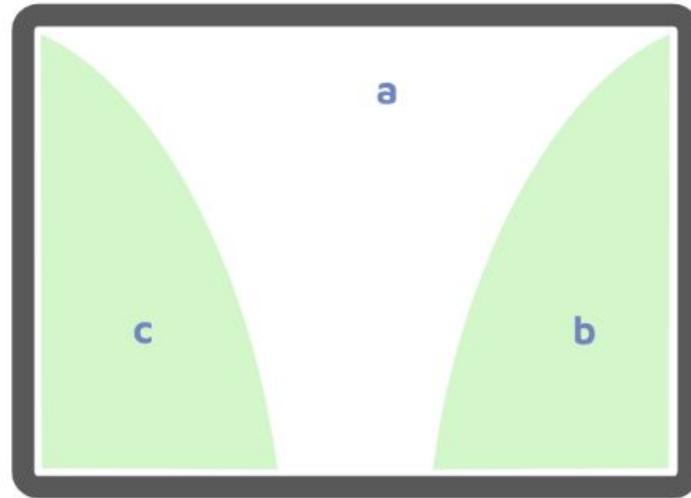
On surface



With one hand



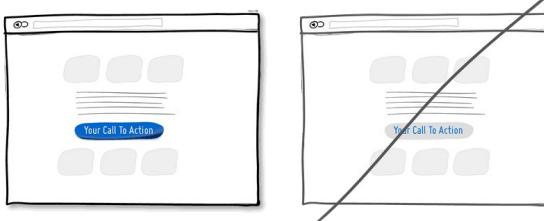
With two hands



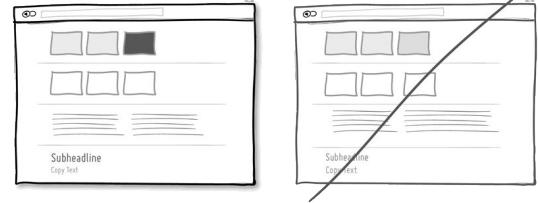
UI & UX GoodUI

This is an overview of the **UI pills** that explain the UI solutions adopted in Sales App

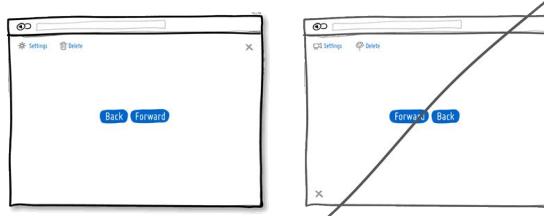
More Contrast



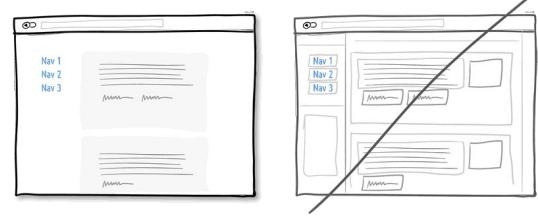
Visual Clarity



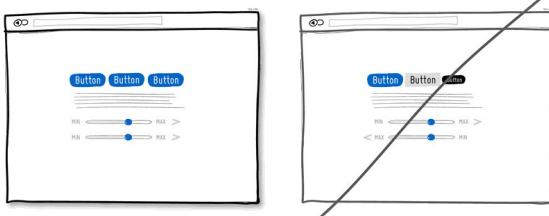
Conventions



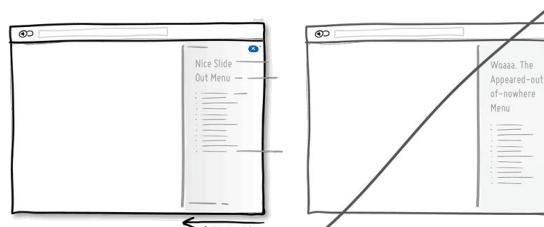
Fewer Borders



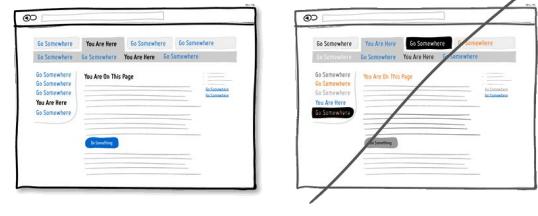
Consistency



Transitions

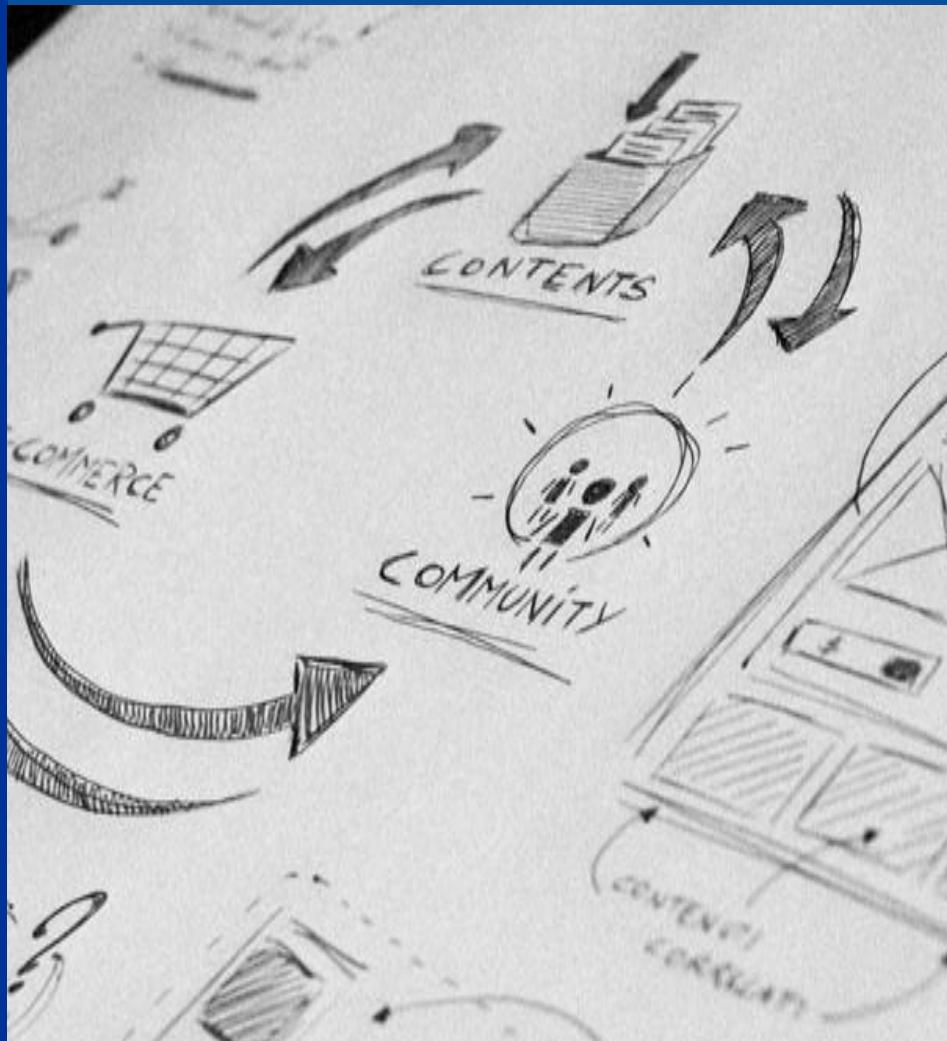


Distinct Clickable/Selected Styles



Sales App

2. Define



Sales App Personas

We focused our attention on the dealership users: the **Salesman** is the target and key user of the Sales App.

A persona in user-centered design is a fictional character created to represent a user type that might use a site, brand, or product in a similar way.

Personas are useful in considering the goals, desires, and limitations of brand buyers and users in order to help to guide decisions about visual design of a website.

- ◆ Salesman
- ◆ Dealer Manager
- ◆ Internal User
- ◆ Key Account

Personas may also be used as part of a user-centered design process for designing software and are also considered a part of interaction design (IxD).



“

Prospecting – find the man with the problem.

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John

Salesman

ACTIVITIES

Typical Salesman activities are:

- Create new Offers
- Contact existing customers
- Find new customers
- Close as many deals as possible

GOALS

Speed up the offer creation process.

MAIN DEVICES

The tablet is the key device for the Salesman.



REQUIREMENTS

Have an easy to use tool to:

- offer the right product to the end customer;
- manage the activities.

FRUSTRATIONS

- Fighting against the system to create an offer for the end customer.
- Complex sales process.

Sales App

User Stories

In the design process we analyzed **Personas**, **User Stories** and **Use Cases** to identify the most important functionalities of Sales App.

In software development and product management, a user story is an informal, natural language description of one or more features of a software system.

User stories are often written from the perspective of an end user or user of a system.

- ◆ Stories keep the focus on the user
- ◆ Stories enable collaboration
- ◆ Stories drive creative solutions

Sales App Use Case

The Salesman needs to create **multiple Offers** for an undecided customer.

The main steps of the Use Case are:

- ◆ Search the customer
- ◆ View customer detail
- ◆ Create a new offer with a new vehicle
- ◆ Select the model and configure it
- ◆ Add a new offer with a new vehicle
- ◆ Select the model and configure it

*John opens the **Account list** section but he doesn't remember if the customer is already existing.*

Account List

PROBLEM

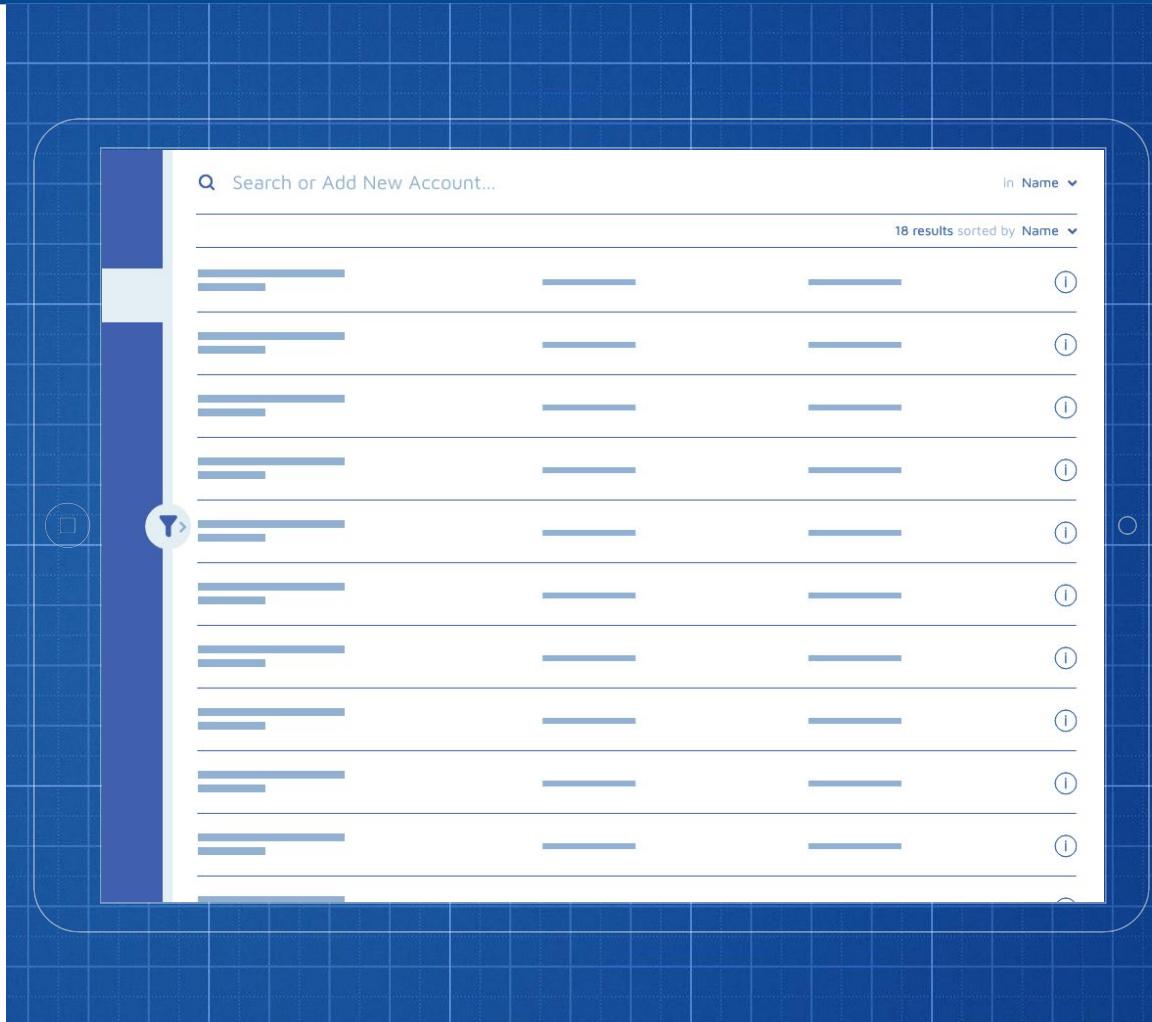
- ❖ There are a lot of duplicate Accounts in the current CRM system.

SOLUTION

- ❖ Unique entry point to Search and Create new account: the user is forced to Search before creating the new account.
- ❖ Default search criteria: account name.

UI Pills:
Extra Padding

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Account List

PROBLEM

- ❖ There are dealers with a lot of accounts (more than 10.000)

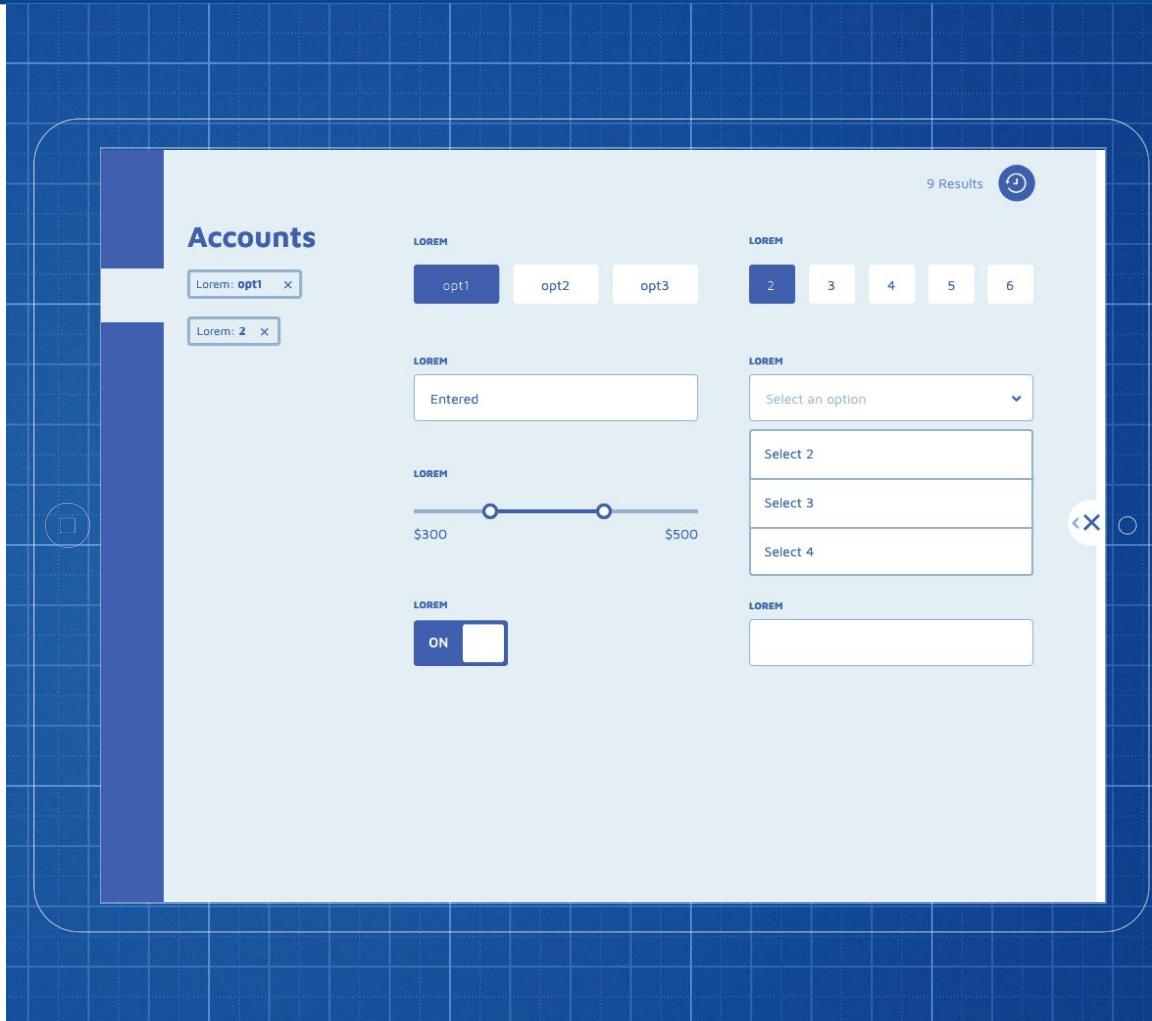
SOLUTION

- ❖ Add multiple filtering criteria to limit the list of visible accounts
- ❖ Filtering section could be expanded to view additional filters

UI Pills:

Persistent Filters
Exposing Options

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Account List

PROBLEM

- ❖ When multiple results are available for the search criteria it is difficult to find the right account

SOLUTION

- ❖ Quick access to detailed customer information without leaving the Account List page
- ❖ Quick access to common user actions (e.g. call the account, send an email, ...)

The screenshot shows a user interface for managing accounts. At the top, there is a search bar with the placeholder "Search or Add New Account..." and a dropdown menu set to "Name". Below the search bar, a message indicates "18 results sorted by Name". The main area displays a list of 18 account entries, each consisting of three horizontal bars of decreasing length followed by a small circular icon with a symbol (likely for more options). To the left of the list is a vertical sidebar with a blue header. The sidebar includes a search icon, a list of account categories with counts (Activities: 10, Opportunities: 10, Vehicles: 10, Contacts: 10), and sections for "Primary Contact Name" with icons for phone, email, and messaging. A "SHOW MORE" button is at the bottom of the sidebar.

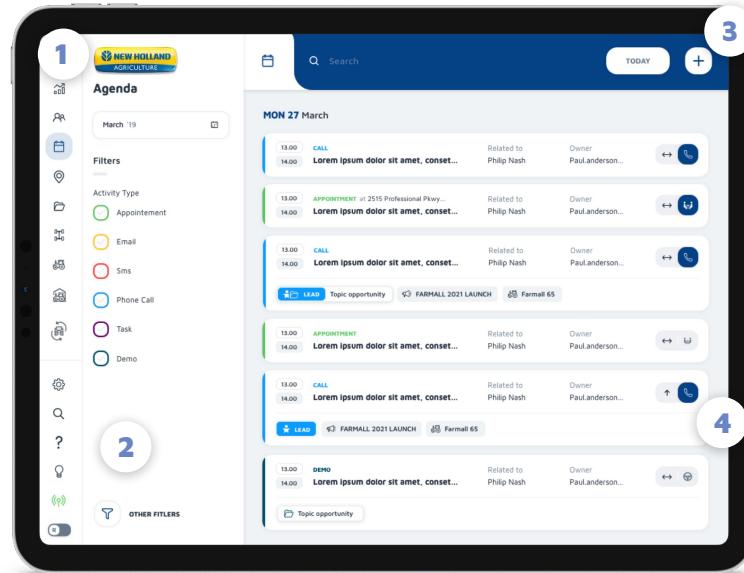
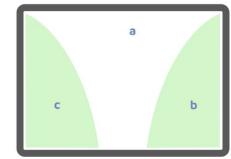
Sales App

3. Develop



Interaction

All the key interface elements are positioned keeping in mind the easiest reachability zones.
Reduction in available user actions to simplify the interface.



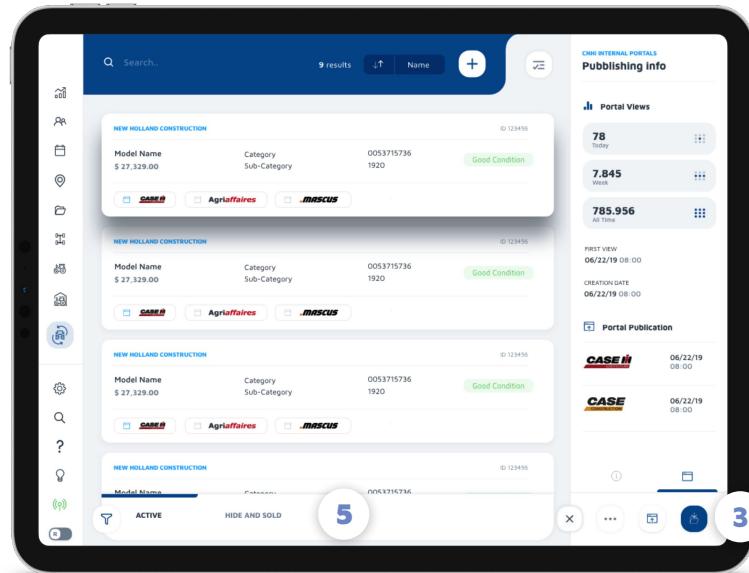
1. Toolbar

2. Filters

3. Actions

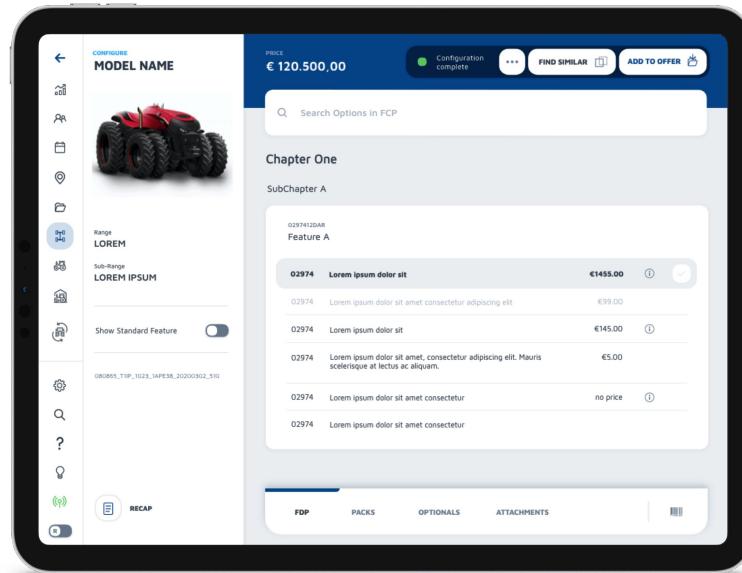
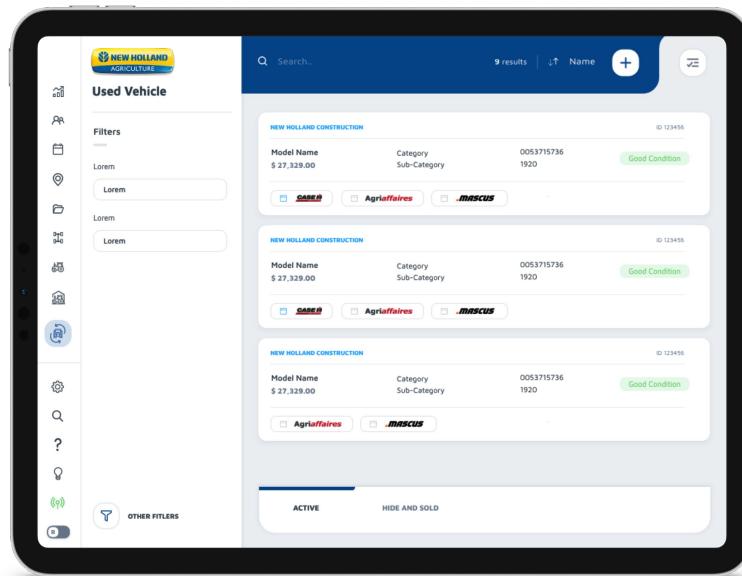
4. List

5. Tabs



Consistency

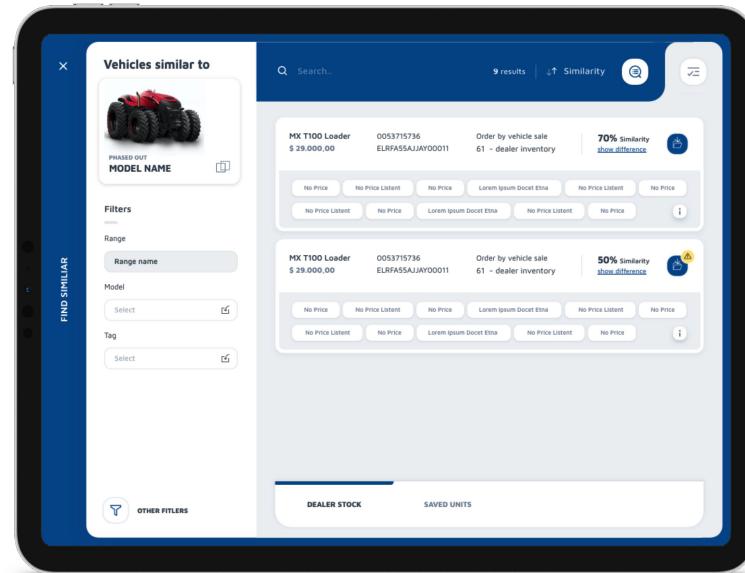
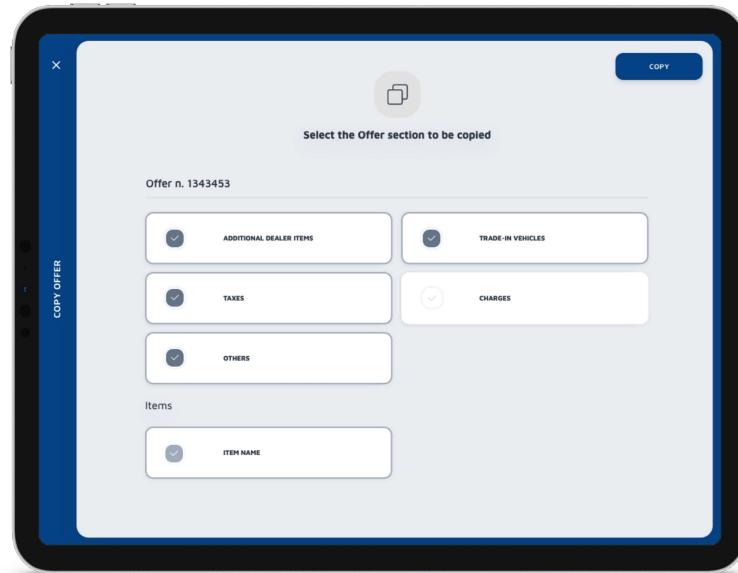
The structure allows users to understand hierarchy of components. During the navigation users understand the product behavior that show a consistent structure where elements are distributed on specific areas.



Different page, same structure

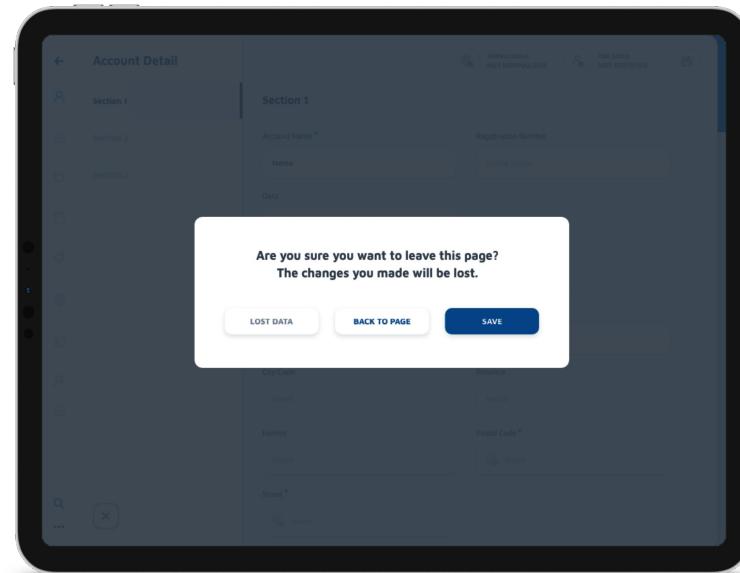
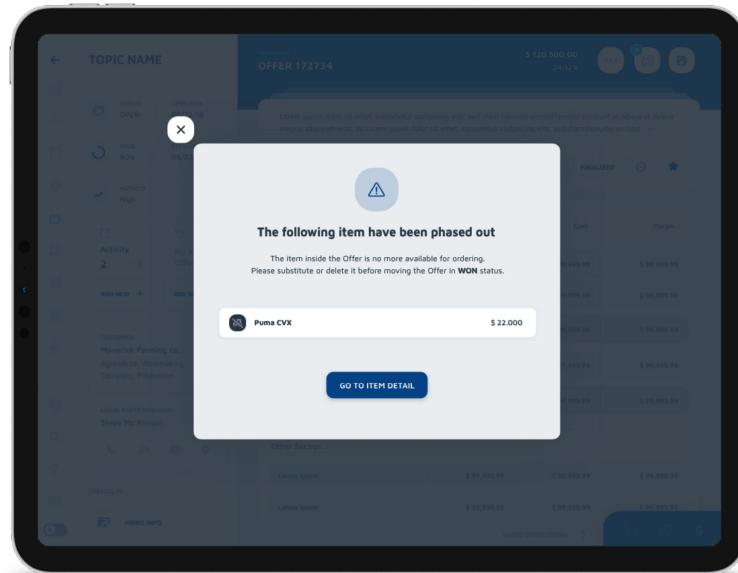
Focused

When users perform a task, the system displays a different interface where users can see and use only the information that are useful to accomplish that specific activity.



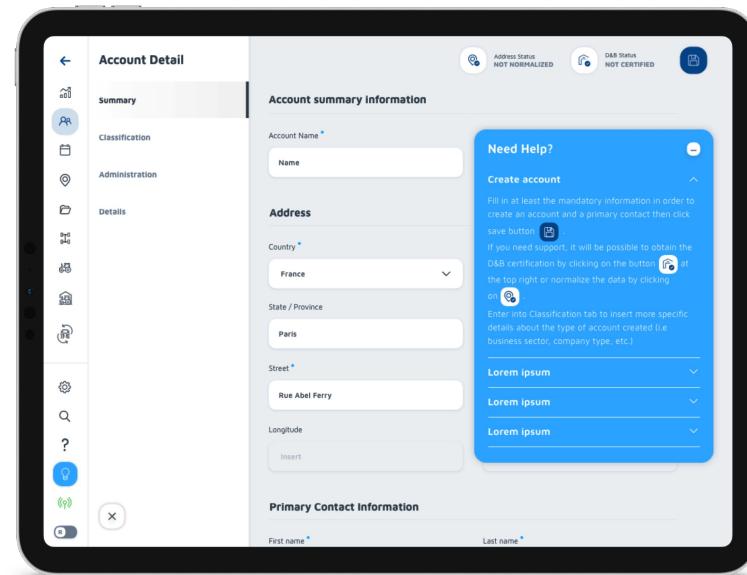
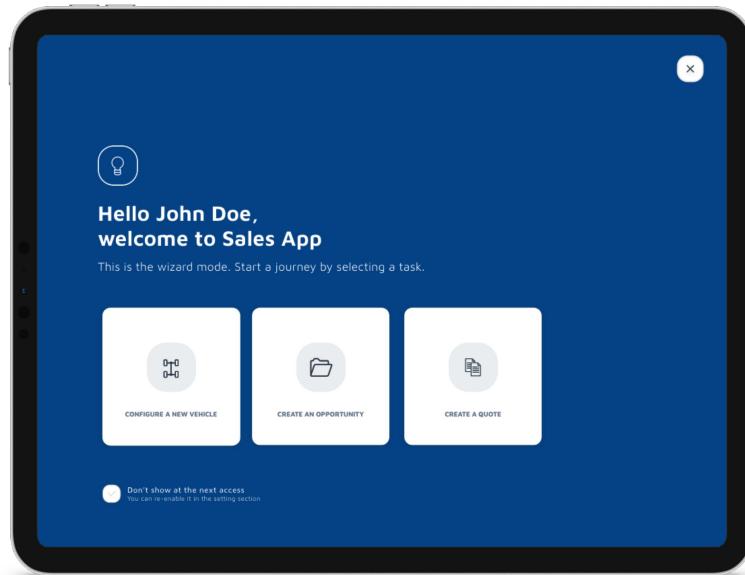
Safe

When users perform a task, the system provides a confirm step to avoid errors and incentivizes checks of inputs that are going to be uploaded in.



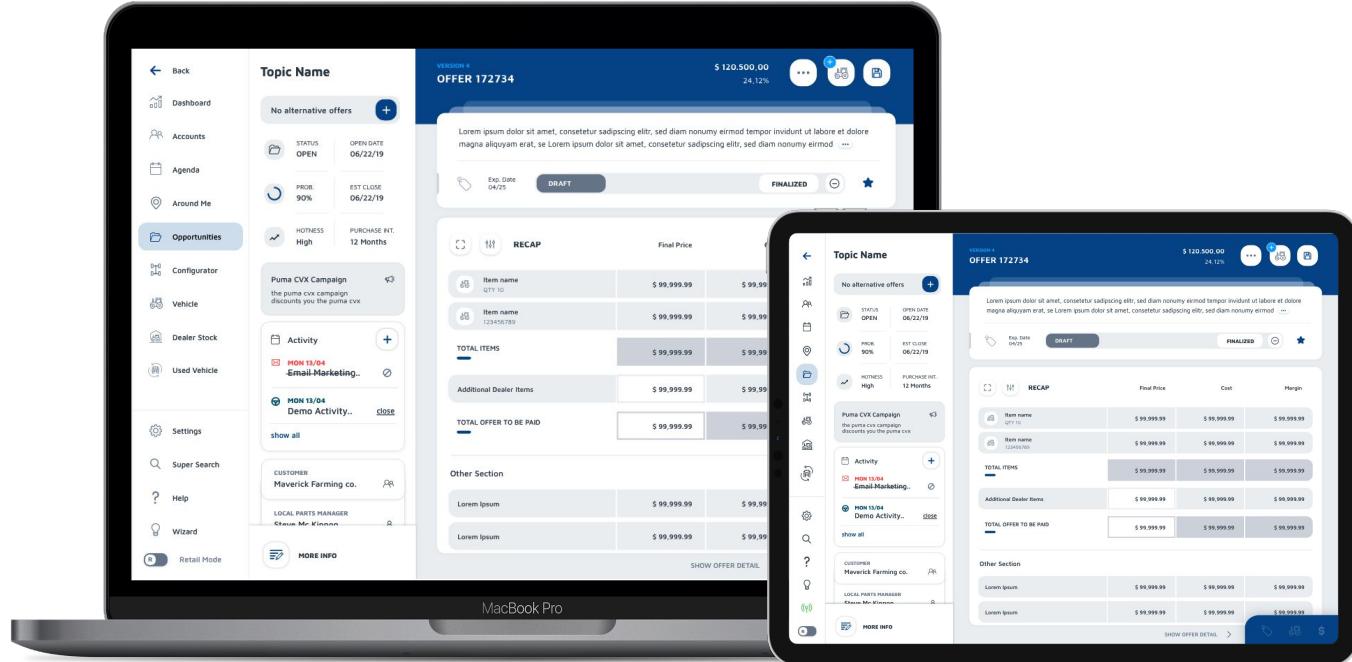
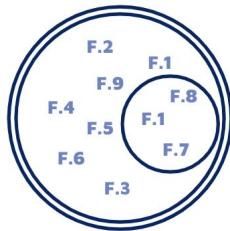
Expert vs basic mode

The application is optimizing spacing in all the sections, in order to speed up the process for the expert users. Through the wizard mode, we are helping also the less experienced users to learn how to use the product that will be part of their daily work.



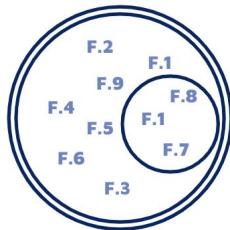
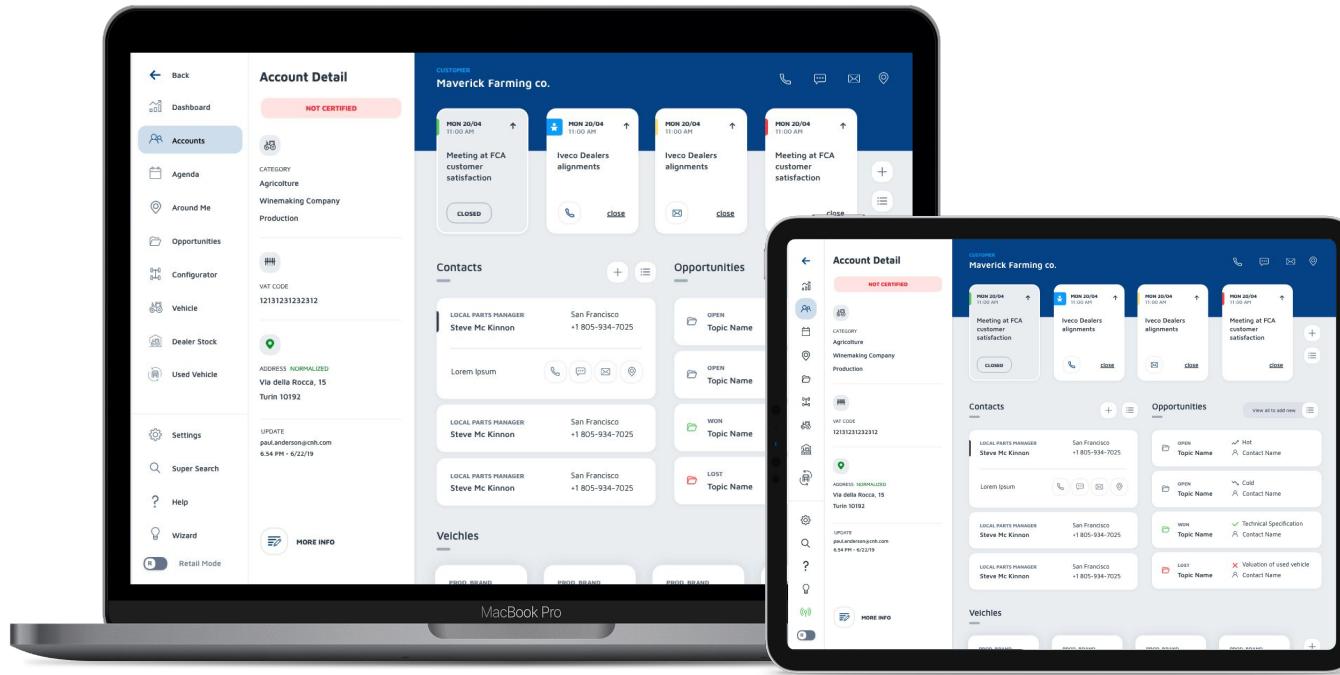
Adaptive / Responsive

Having in mind the “on the go usage” of mobile devices, it is appropriate not to think to replicate the whole complex functions on this device.



Adaptive / Responsive

Having in mind the “on the go usage” of mobile devices, it is appropriate not to think to replicate the whole complex functions on this device.



Sales App

4. Deliver



Design system and Design Assets To Develop

The dashboard displays the following information:

- Open opportunities overview:**
 - All: 30
 - Without offer: 12
 - With offer: 18
- Overdue opportunities:** 4 (You still have opportunities to close)
- Arriving from Lead:** 2
- Open opportunity highlighted:**
 - Without offer:** New sales opportunities (2)
 - Older than 14 days:** 3
 - Lead:** 2
 - Demo:** 2
- With valid offer:** Next opportunities to manage (5)
- Expiring in next 12 days:** 1
- Lead:** 6
- Demo:** 6
- Financing:**
 - Created On Sales App
 - With a Financial Request in status "evaluated"
 - With A Financial Request In Status "Approved"

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Dealer Interviews Insights & Solutions

6

Sessions

- France
- UK
- Germany

4

Tasks

- Think aloud session methodology
- Dealer feedback tracking
- Based on real use case (tasks)

5

h Tot. of Interviews

33

New Requirements

- based on Insights collected during interviews

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The cool side of technology

4. WRAP UP

5. THANKS

2 USER TESTING MANUAL

2.1 Introduction
Hello Mr (user name), I'm (main facilitator). We work for Coolshop, we have designed this research, together with CNH, to collect while they are performing key tasks. The improvements of this version, to be implemented during this test after few preliminary questions and perform the following tasks:

- Quick offer Creation
- Detailed Offer Creation
- Demo Activity Management
- Lead Management

At the end we'll ask you to give us general feedback. The test will be about 1 hour. We are testing the SalesApp not you, so if you have any doubts, problems you have encountered or questions. We will record the screen for reviewing.

2.2 Warm Up
. Please could you present yourself, your job role?
. Could you describe your typical working environment?
. Which devices you use and what for?
. What were your first thoughts when you opened the SalesApp?
. What was your first impression when you used the SalesApp?

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10123 Torino - Via della Rocca, 15 - Tel. 011 5536789 - www.coolshop.it - info@coolshop.it
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1 RESEARCH DESCRIPTION

1.1 Research Goals
The goals of this User Testing session are to detect frictions that users perceive while performing their tasks, furthermore to get insights and inspirations for future implementations and contents for the Wizard Mode.

1.2 Methodology
These tests will be led remotely, through a think aloud approach. While users perform their tasks and interact with the SalesApp, they narrate thoughts and feelings related to interfaces and general flows, while sharing their screen.

1.3 The Structure
These tests are divided in the following sections:

1. INTRODUCTION
2. WARM UP
3. TASKS
 - a. Quick offer Creation
 - b. Detailed Offer Creation
 - c. Demo Activity Management
 - d. Lead Management

1
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Functionalities analysis

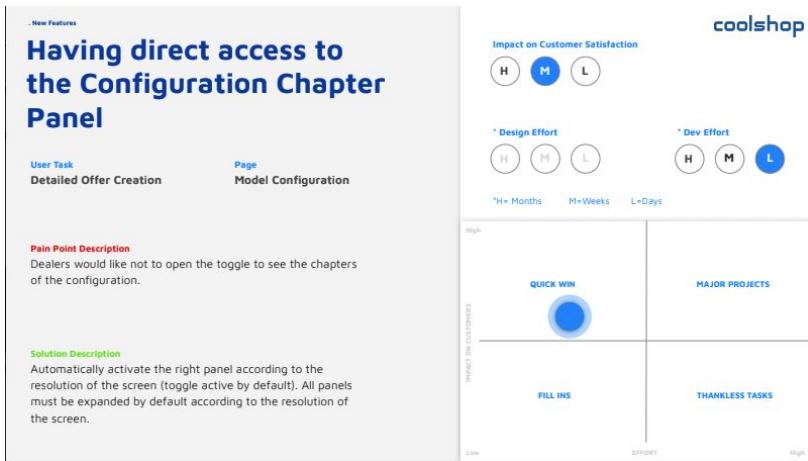
- **Functionalities have been clusterized in a feasibility matrix based on**

- Impact on Customer Satisfaction
- Design Effort
- Development Effort

- **The feasibility matrix creates 4 quadrants**

- Quick Win
- Major Project
- Fill Ins
- Thankless tasks

Functionalities clusterization based on feasibility Matrix



Quick Wins recap

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Requirements Recap

15 Quick win

| QUICK WIN | MAJOR PROJECTS |
|--|---|
| . New Features Having direct access to the Configuration Chapter Panel | . New Features Alert modal when landing on the SalesApp for both mandatory and non mandatory updates |
| . New Features Autocomplete in the activity location field | . New Features For Dealer Managers: move the dealer filter from the "other filter section" to the left panel |
| . Ambiguity of Items Adding tooltip on key items | . Ambiguity of Items Reason why of the input: "Last brand bought" in the Demo Unit section |
| . Useless Information Place the follow up section only when there is the follow up. | . Process Improvement Cut the "end demo activity and start a new task" process |
| . Lack of information Display dates on opportunity lists | . Lack of information Insert an informative carousel during the sync of the SalesApp |
| . New Features Insert an informative carousel during the sync of the SalesApp | . Ambiguity of Items Adding labels on navbar buttons |

Sales App Stats

When developing a software solution it is difficult to get a good understanding of what was created: we create *bits* and not tangible things.

These are some metrics, collected in the last 2.5 years, to identify the impact of what we have created.

- We released an application for **4 platforms** (Android, iOS, Web and Windows)
- We released **16** different **versions** in production
- It is available in **9 markets** (France, Germany, UK, Italy, Spain,...) - the major European ones
- It is available for **5 brands** (Case Construction, Case IH, New Holland Agriculture, Steyr and Kongskilde)
- There are more than **1.000 dealerships**
- There are more than **3.000 users (dealer)** and ~ **400 internal users (CNHi employees)**
- The users created more than **200.000 new records** (Accounts, Contacts, Activities, Opportunity and Offer)
- More than **2.500.000 records** are available in the app

Opportunities



We are looking for future Heroes!

Opportunities for collaboration:

- **Internship**
- **Thesis**

We are looking for **Junior Web Developers** with strong programming skills, young people who want to learn new technologies and are skilled in backend and/or frontend.

What you'll do:

You will **write the backend/frontend code for web applications**.

We need people who are passionate about developing impactful, high-performance web applications using up-to-date technologies and patterns.

What will you need:

- A **BS/MS/Ph.D. in Computer Science**, similar technical field of study, or equivalent practical experience
- Familiarity with **coding standards and design patterns**
- Excellent **English**
- **Teamwork skills**





MARTEDÌ
31
GENNAIO

16:00

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Q & A

Thank You

