

UX Case Studies

SALESLOG

Prepared by Soeun Yoon
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Soeun Yoon

BFA in Graphic Design and a concentration in Computation, Technology, and Culture at Rhode Island School of Design (RISD)

Recent Grad, Dec. 2020

Experience: UI/UX designer at TheKlab, Design lead at Hack@Brown, Product Development and Marketing intern at lemlem

Saleslog

Business to Business (B2B) sales and marketing management with a focus on networking within the department and the customers. Collects customer's needs and problems by classifying the data with AI.

My Role:

Brand Analysis

UI/UX

Team:

Me as designer

A Researcher

A Developer

Tools used:

Adobe Illustrator

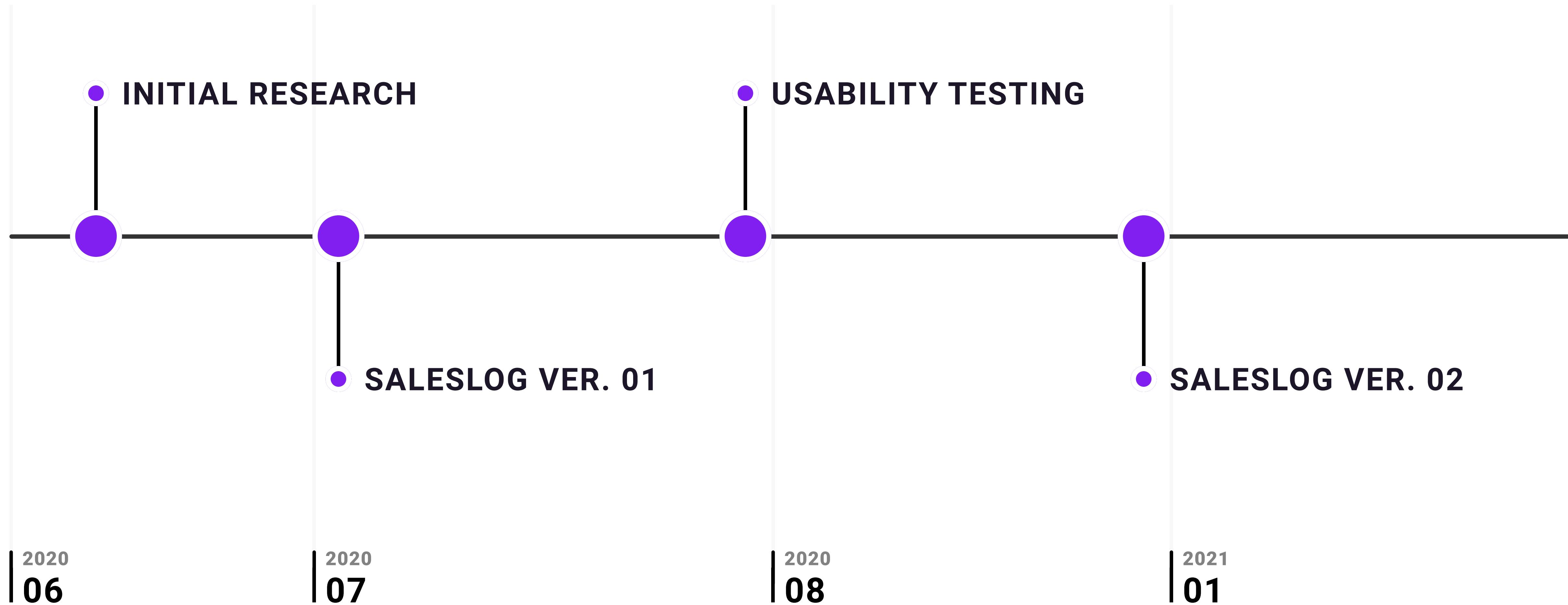
Figma

Cinema 4D

Timeline:

June 2020 - Present

Timeline



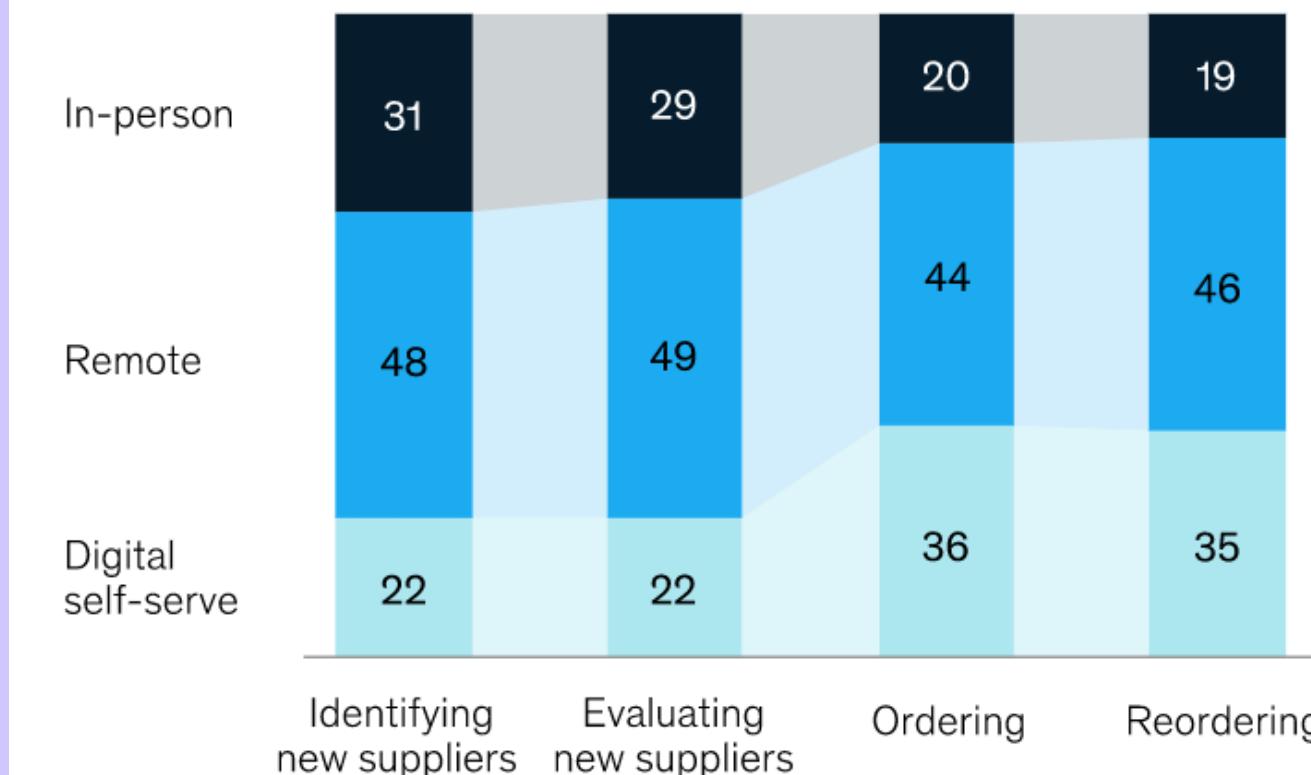
Understanding Sales

Sales involves salespeople who possess a specific set of sales skills and the knowledge required to facilitate the exchange of value between buyers and sellers that is unique from marketing and advertising.

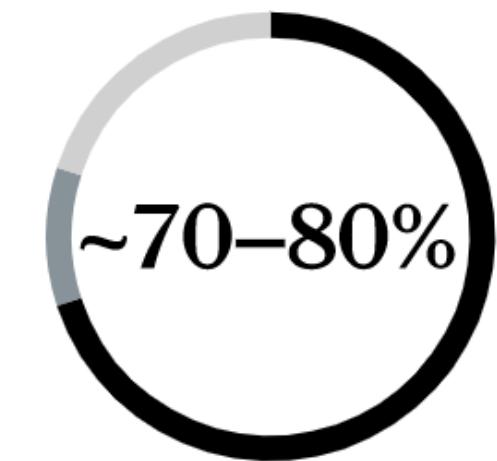
Most B2B seller interactions have moved to remote or digital ...

Current way of interacting with suppliers' sales reps during different stages^{1,3}

% of respondents



... and that's exactly what customers want.



of B2B decision makers prefer remote human interactions or digital self-service^{2,3}

Why?

- Ease of scheduling
- Savings on travel expenses
- Safety

¹Q: "How would you currently interact with sales reps from your company's suppliers during the following stages of interactions?"

²Q: "How would you prefer to interact with sales reps from your company's suppliers during the following stages of interactions?"

³Figures may not sum to 100% because of rounding.

McKinsey
& Company

Understanding Sales

Businesses didn't suddenly discover digital presence when Covid forced them to adapt their operations. Businesses were already moving online before the pandemic, but Covid accelerated the timeline and pressured them to embrace a digital transformation at a rapid pace.

Problems

Due to the current situation like the contact-free and social distancing regulations, the original sales strategy needed to be changed. The problems with the existing strategy are:

- 01** The collected customer's data is lost when the team or the salesperson in charge transfers
- 02** The business reports are neglected by the lack of follow-ups
- 03** There are not much opportunities for salespeople to develop sales skills and knowledge.

Project Brief

How can we provide **convenience** within the department,
helpful information for growth in knowledge and extensive
data analysis for business opportunities?

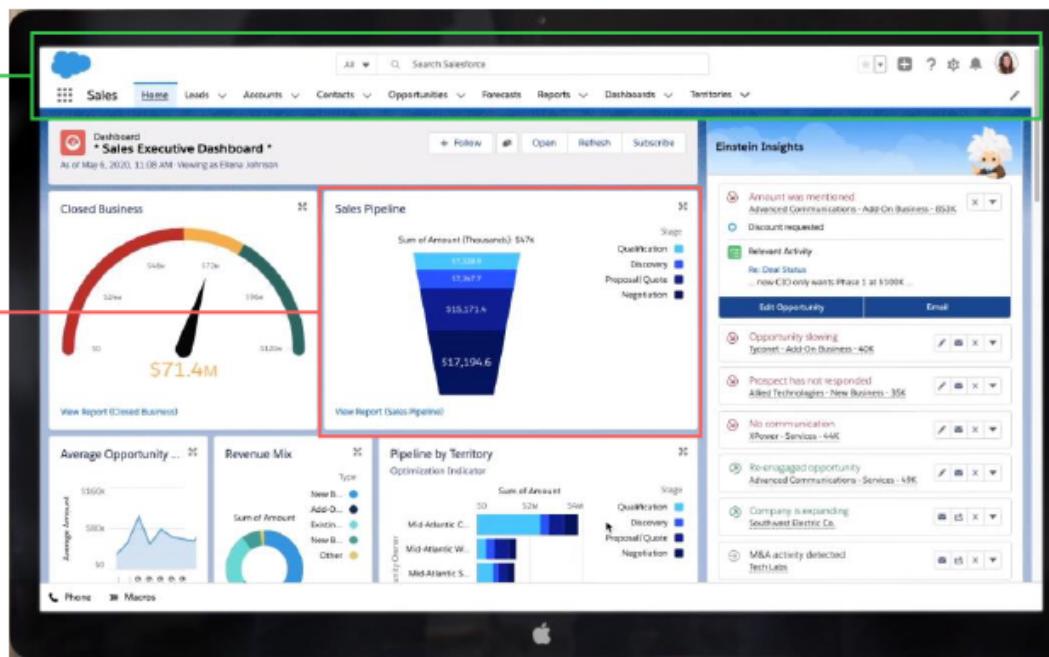
Competitive Analysis

Before I jump into design, I researched other similar software in the market including Salesforce, SAP Hybrid Sales Cloud, and SAP JAM.

Salesforce

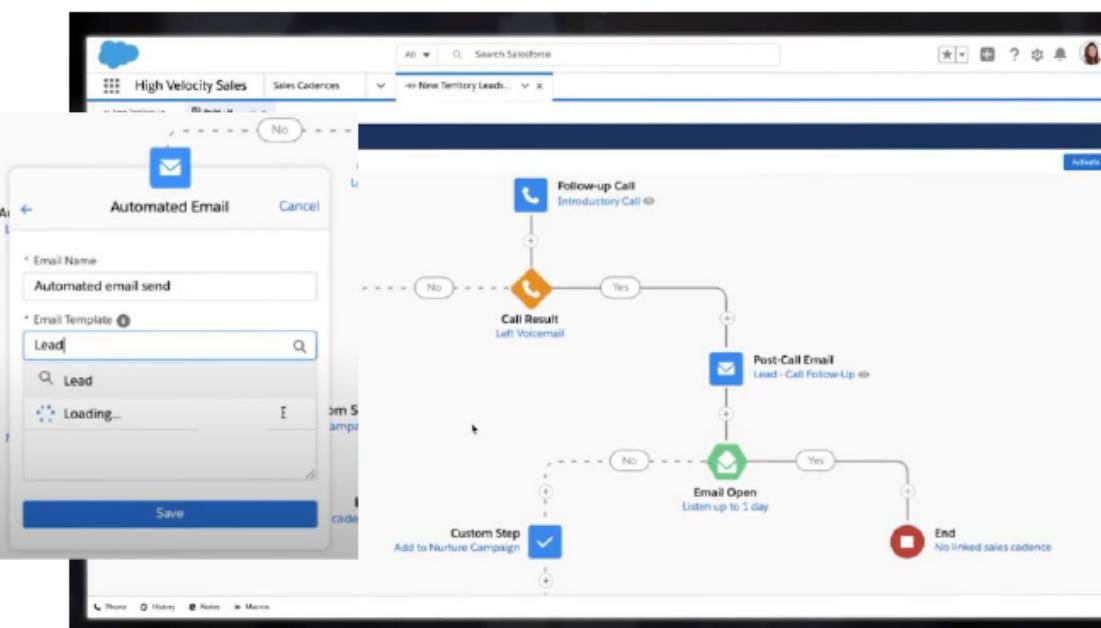
Dashboard

- Organize current business performance at a glance → Easily derive business insight
- Classification of sales activities according to sales pipeline (Salesman's individual business performance is also recorded separately by sales pipeline)

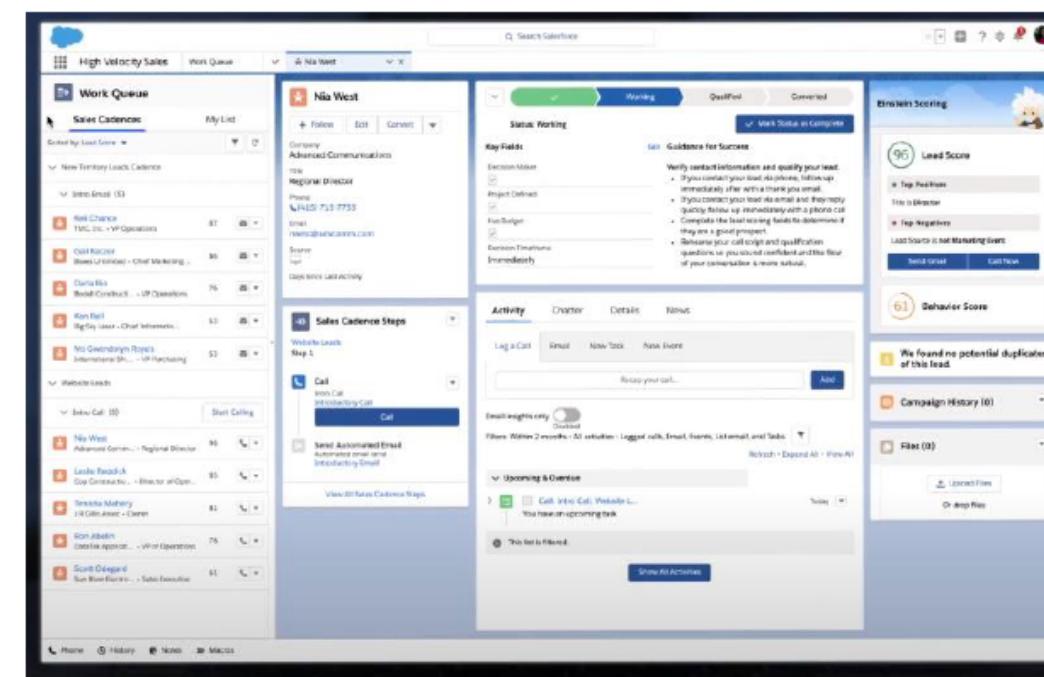


Network

- Organize contact network by sales activity
 - Drag and drop tool
 - Template provision (or saving)



Summary of sales activity (contact) status by step



Personal Page

Summary of sales activity performance by sales pipeline

The page displays a summary of sales activity performance by sales pipeline, including a list of opportunities and their details, and an Einstein Insights section.

AI recommends more productive deal

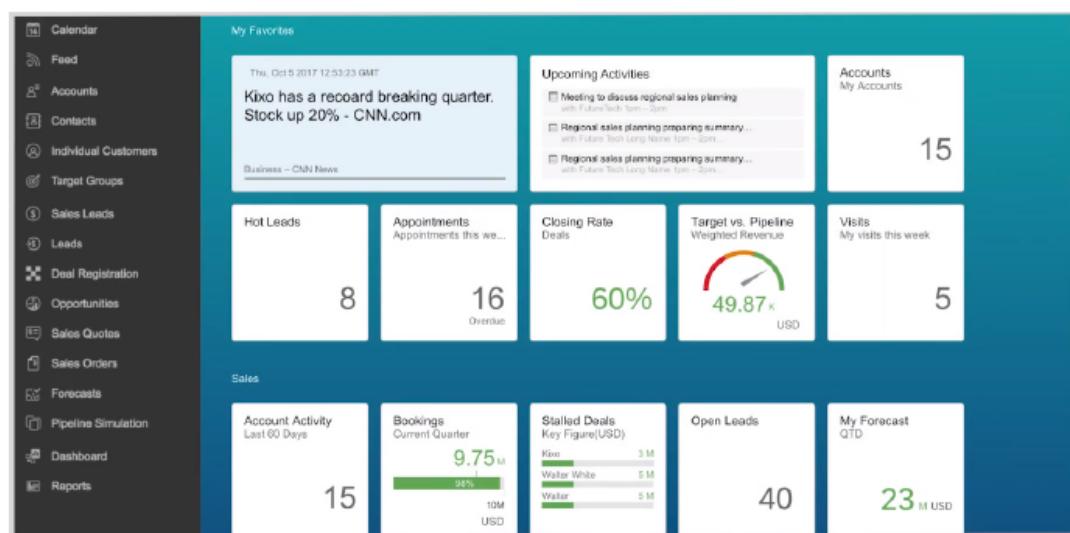
The page shows AI recommendations for a deal, including a list of tasks and an Einstein Insights section.

SAP Hybris Sales Cloud

Dashboard

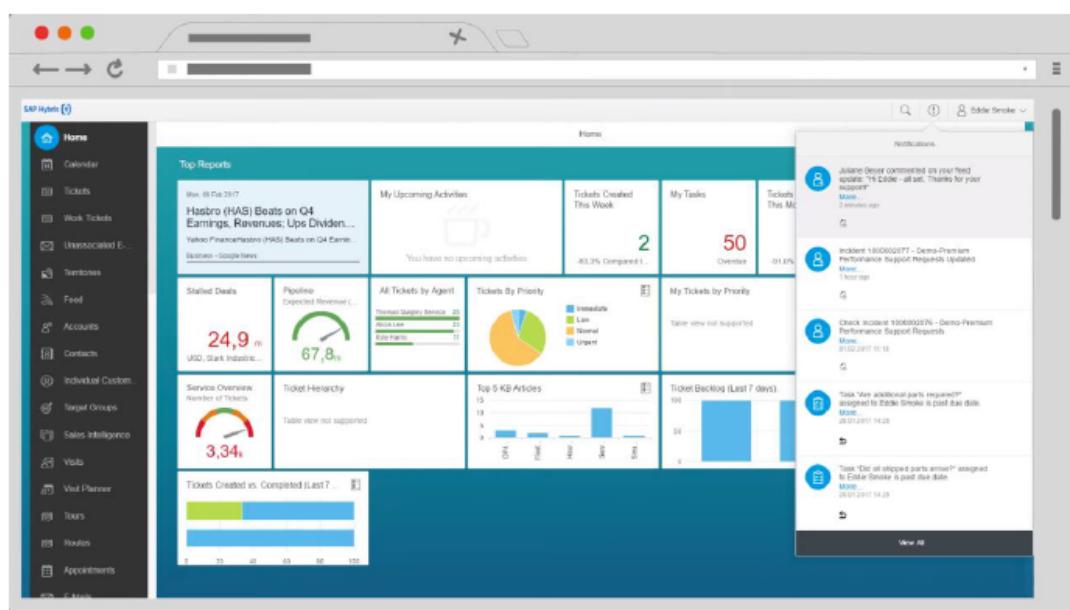
[manager] Overall contract signing status rather than step-by-step progress

Home screen configuration focused on personal work



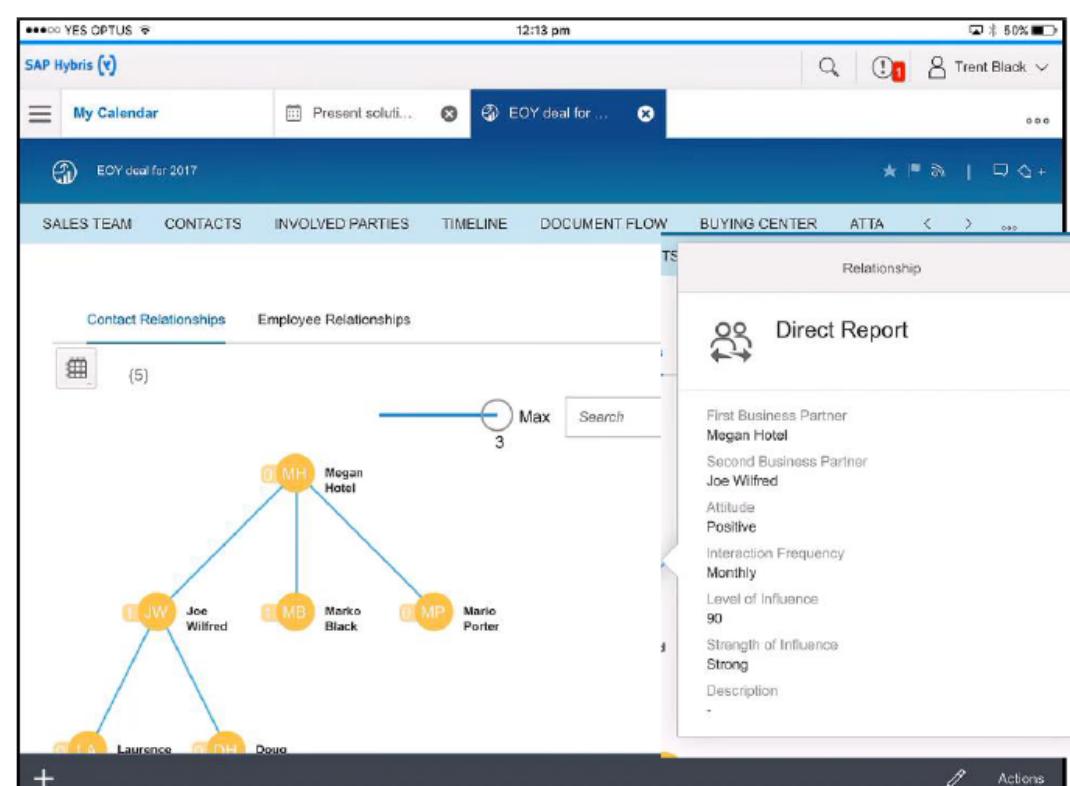
[employee] Contact others with messages/phones

Shows overall personal work



Buying Center

Organize information/relationships of the purchasing center → Can organize specific personal information such as influence, contact frequency, attitude, and other opinions, as well as name and position

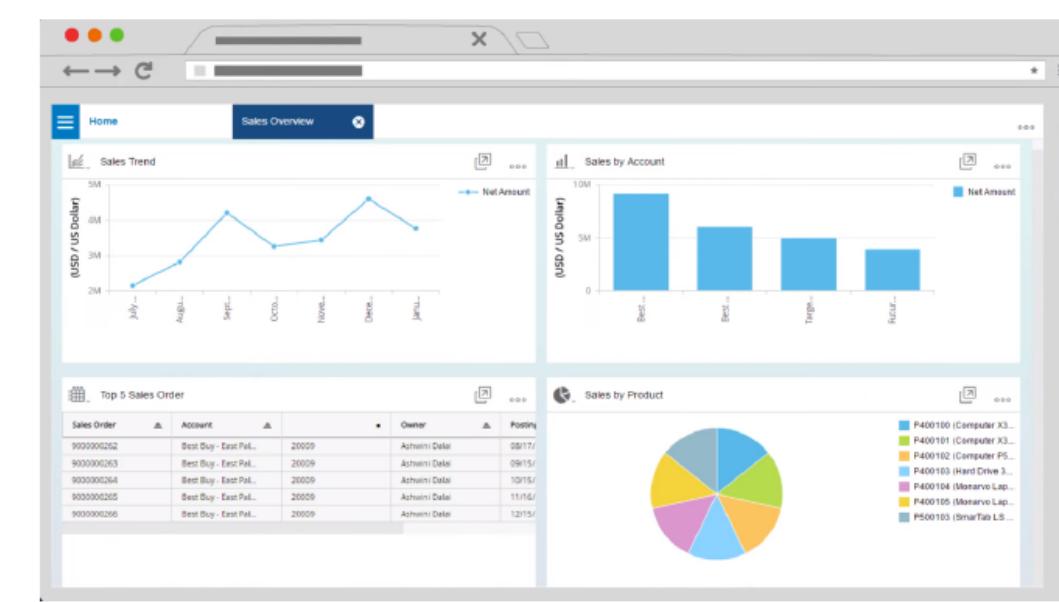


Simple notes available when organizing the purchase center

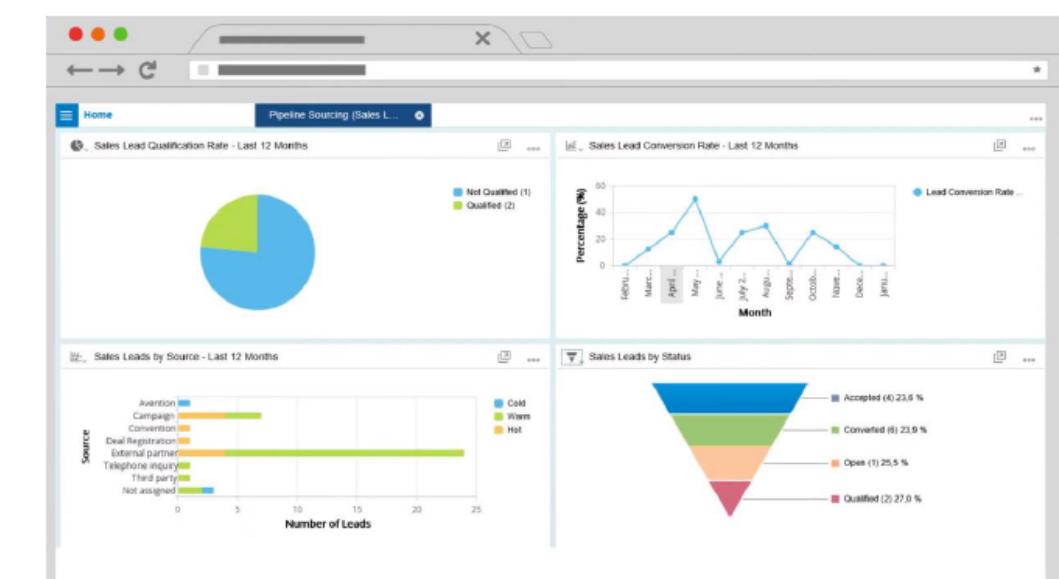
Account Information form showing fields for Owner (Trent Black) and Marketing Unit. A note is present: "Spoke to James during the roadshow is very interested in our".

Business status reporting method

Provides overview based on quantitative indicators (monthly/product/purchaser sales)



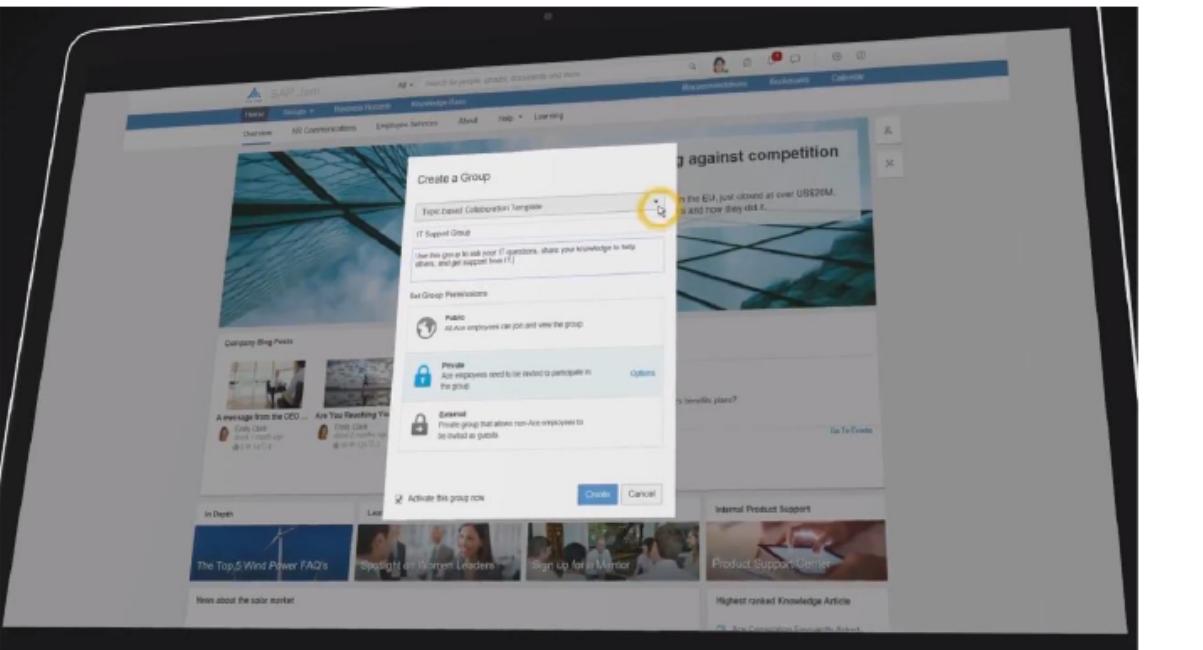
Contract progress organized by lead



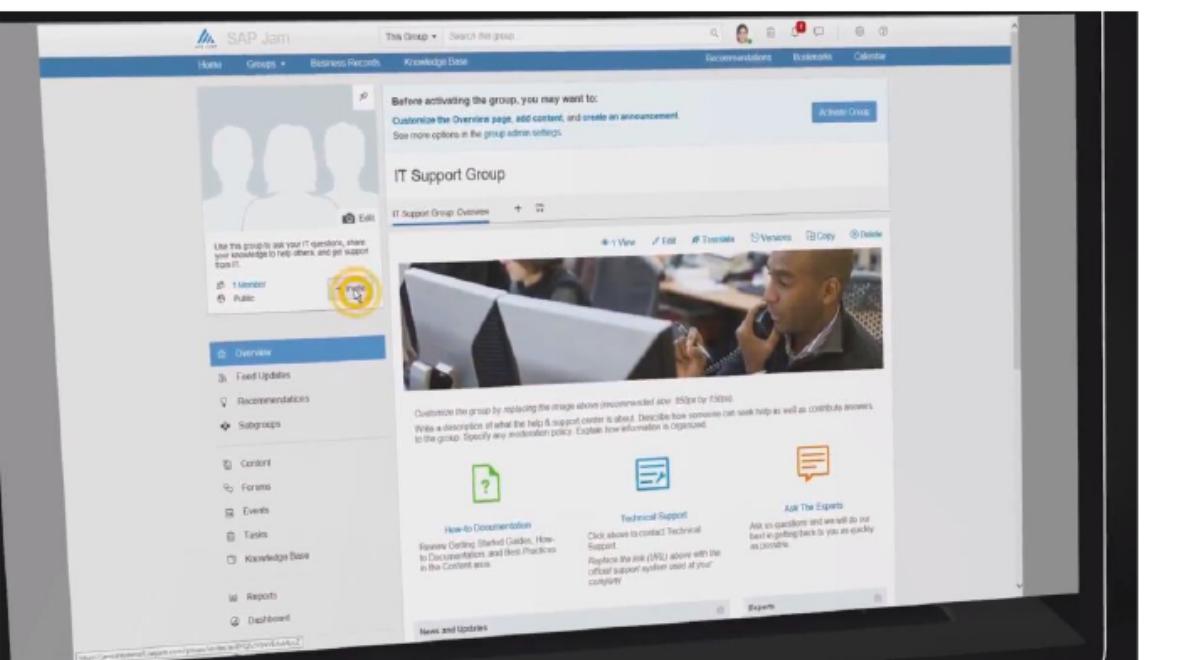
SAP JAM

Team/department collaboration tool

Similar to Trello, collaboration is possible by setting the sharing scope



Easy document sharing even in different departments



Persona

Understanding the user type was important to design with the users in mind by focusing on their goals. I asked the businesses we provide service to about what are their needs in different team roles such as salesperson, manager, and executive.



Kevin
Salesman

- Lack of sufficient information about clients
- Lack of sales skills
- Not enough authority to make decisions
- Most active in sales practice

gets resources from...

- Network of peers within the industry
- Internet/ Professional website (press release)
- Business Social Media
- Industry conferences & events
- Personal social media

Scenario

Infers about the client company and organizes the results after collecting information that is the basis for the sales manager's decision-making

Introduces the company's solutions attractively and at the same time finds out the needs of the client through questions

Business Goals

[Product] Coordinate and negotiate between the company's production, purchase, and logistics teams and the customer company

[Personal] Satisfy the personal needs of the client → Intimate relationship with the client

Recognize that the company's solution has greater value compared to other companies

User Need

- Create a visible and quick sales log
- Effective collection of information about customers.
- Understand clients and their business (Supply status with customers of customers, competitors of client, and other suppliers including the company)
- Efficient business decision-making within limited information

i. Service Feature

Classification of salesperson/ client in the past journal

Provide information on market status and competitors

Journal creation function → Voice or keyboard input

Systematic classification of written business log (convenient to share) → text analysis

ii. Product Usage Behavior

Collects and organizes information about clients based on past data

Creates a sales activity log and establishes future sales plans through feedback



Peter Manager

- Expected to manage the overall operation of the sales team
- In addition to personal sales activities, employee management is performed by providing feedback to sales personnel.

Business Goals

Conduct efficient sales activities with limited resources

Develop new clients and maintain good relationships with existing clients

Foster professional department members

User Need

- Establishment of sales activity direction according to company's strategic and operational changes
- Target client (new client) discovery and overall management of existing clients
- Enterprise-wide management of business logs
- Improvement of sales ability

Scenario

Share the progress with the customer based on the journal written by the salesperson.

Establish a sales direction that considers internal and external situations, and make them aware of it to salespeople.

i. Service Feature

Provide immediate feedback on written journals

Key notification function on the main screen
Classification by needs to help understand sales activities

ii. Product Usage Behavior

Provide feedback based on the written journal

Establishment of sales direction based on statistical data classified by needs



Alexandar Executive

- difficult to spend a lot of time on managing sales activites because it is position that manages all books company-wide → Requests summarized information from sales department

gets resources from...

- Summarized business data and statistics for information exchange among executives and employees in the industry
- Network with third-party executives and industry authorities

Scenario

Receives a report of sales activity through a report that summarizes the business logs and data collected over a certain period of time

Business Goals

- Appropriate budget management
- Sales growth over the previous year
- Increased expertise through collaboration with partners

User Need

- Set company's strategic and operational direction considering external interests and internal situations
- Intuitive understanding of current level of the sales department and supervision of management
- Various internal and external information to derive business insight

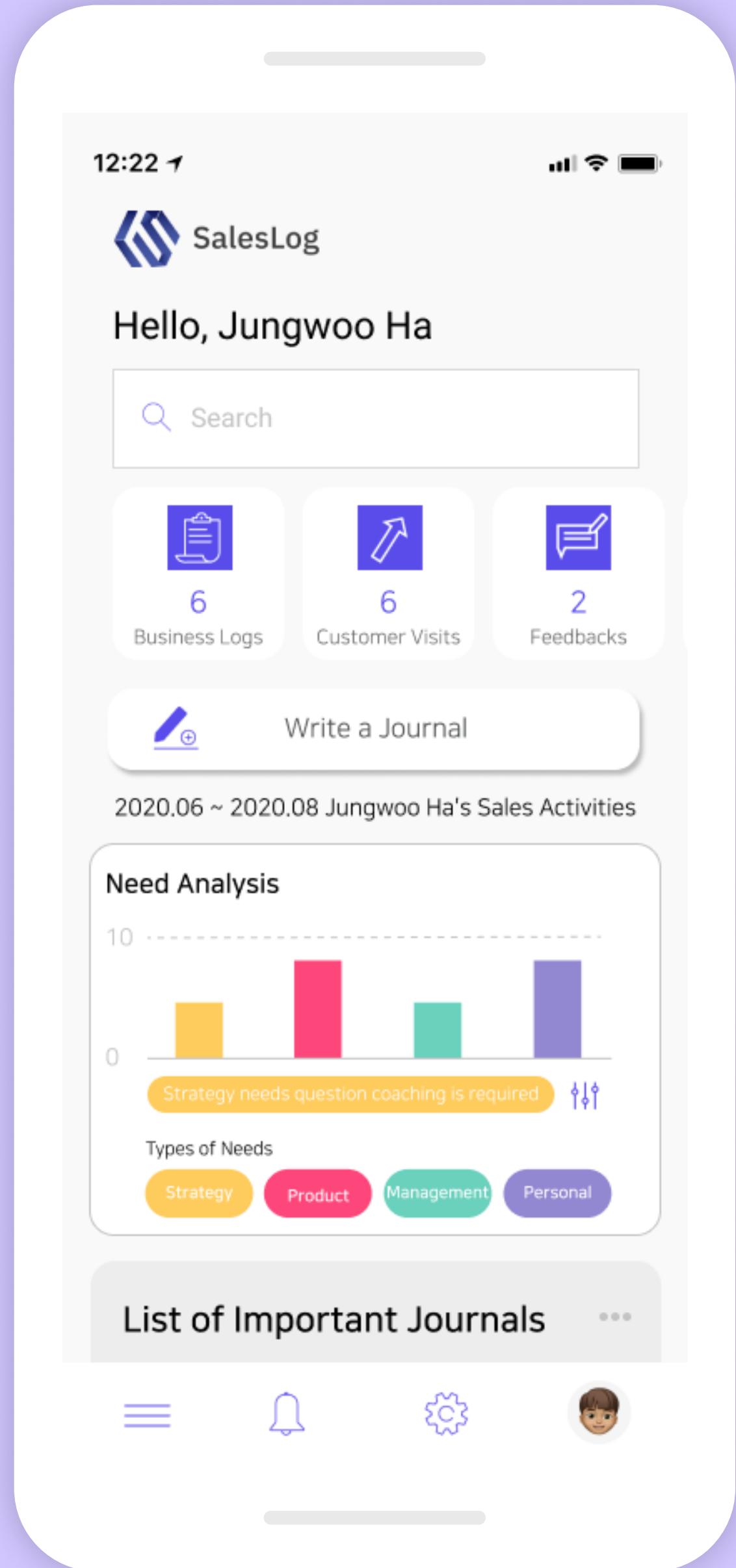
i. Service Feature

Summarize, and organize sales activity report

ii. Product Usage Behavior

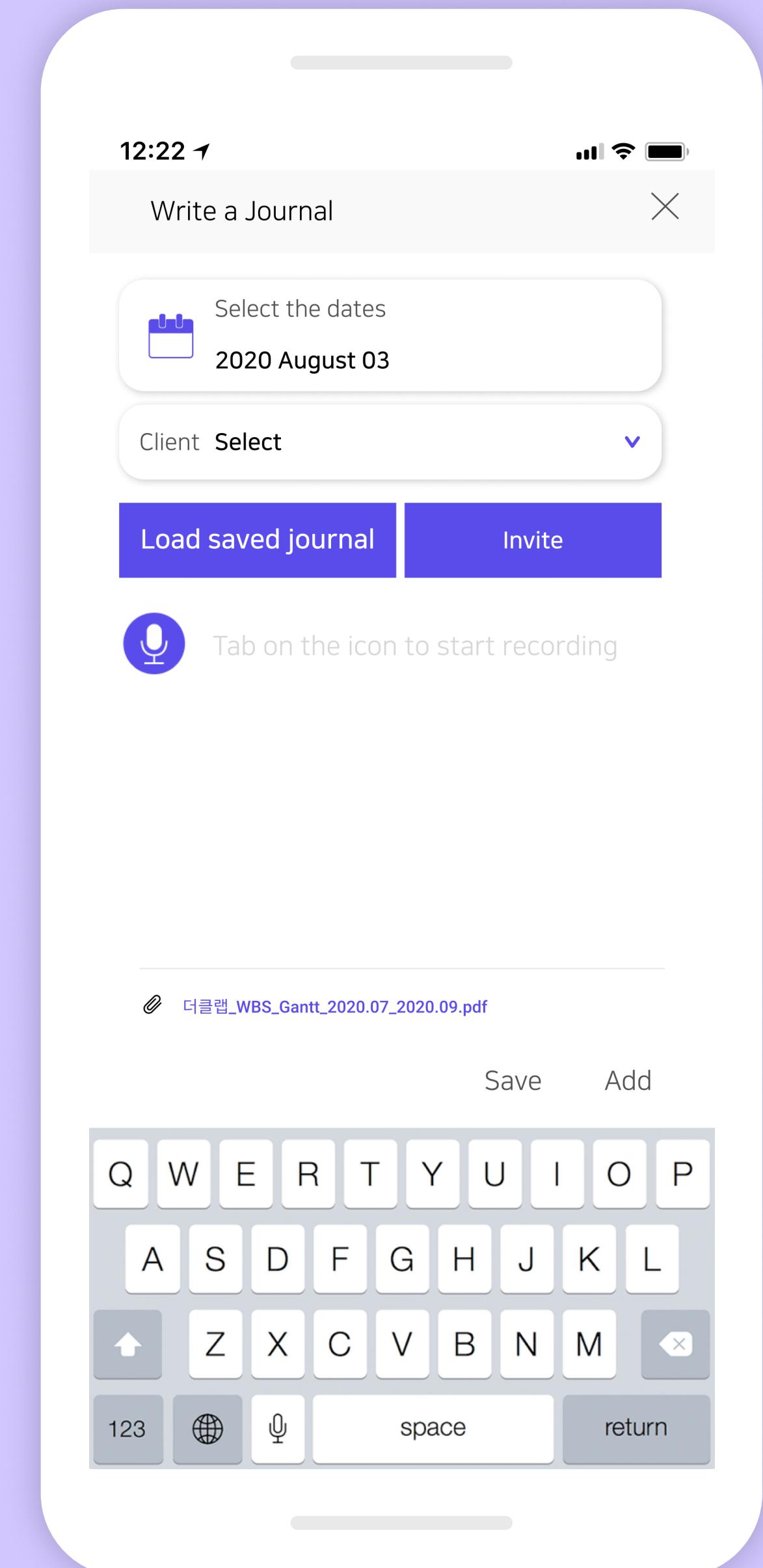
Use the generated sales activity report to understand the current status of the sales department and to establish company strategy

Saleslog Ver. 01



Convenience

Speech to Text or also known as STT functionality in which it recognizes the salesperson's speech input and converts speech to text.



Classification

The customer's needs are classified into four categories such as strategy, product, management, and personal by AI.



STRATEGY

Present Status Example

- New market KSF
- Customer discovery
- Defined customer needs
- New product development capabilities
- Decision-making process
- Secure investment capacity

Strategy Guide

Needs

- Request to support for finding partners
- Reset existing partnerships
- Request necessary market/customer information
- Ask for price reduction
- Change in own processes to old processes
- Investment cooperation

PRODUCT

Present Status Example

- Cash flow management
- Total cost reduction
- Limit/reduce inefficient investment
- Finding substitutes
- Work process change
- Manpower adjustment

Product Guide

Needs

- Postpone payment now
- Change payment terms
- Level of demand for price reduction
- Substitute introduction or level of demand
- Request changes in company activities based on changing work process
- Adjust work volume

MANAGEMENT

Present Status Example

- Cash flow management
- Total cost reduction
- Limit/reduce inefficient investment
- Finding substitutes
- Work process change
- Manpower adjustment

Management Guide

Needs

- Postpone payment now
- Change payment terms
- Level of demand for price reduction
- Substitute introduction or level of demand
- Request changes in company activities based on changing work process
- Adjust work volume

PERSONAL

Present Status Example

- Work coordination
- Business cooperation

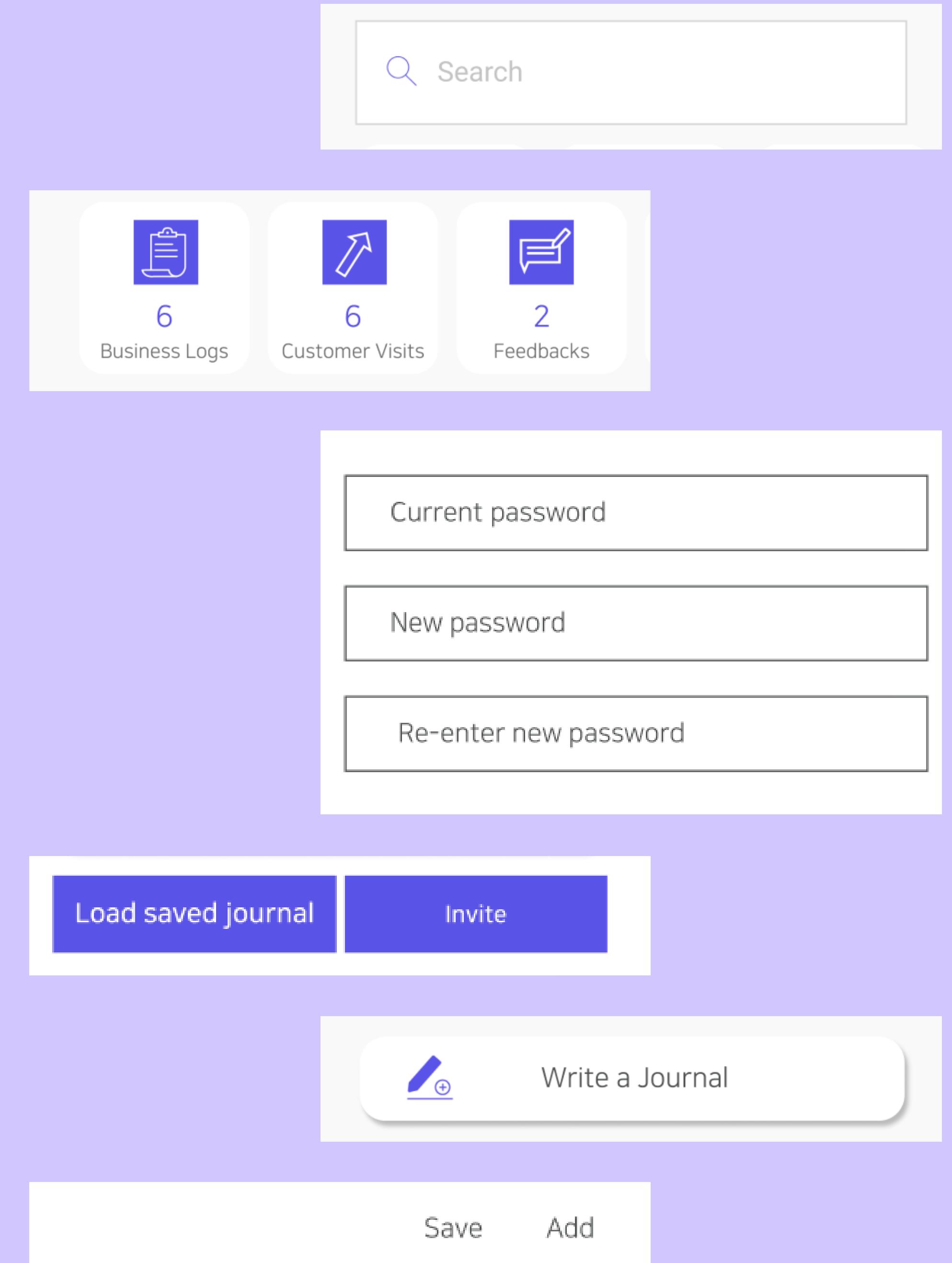
Personal Guide

Needs

- Request for market/customer/business information
- Human network required to form partnerships to achieve KPI
- Referral Request
- Request for part of business

Missed Opportunities

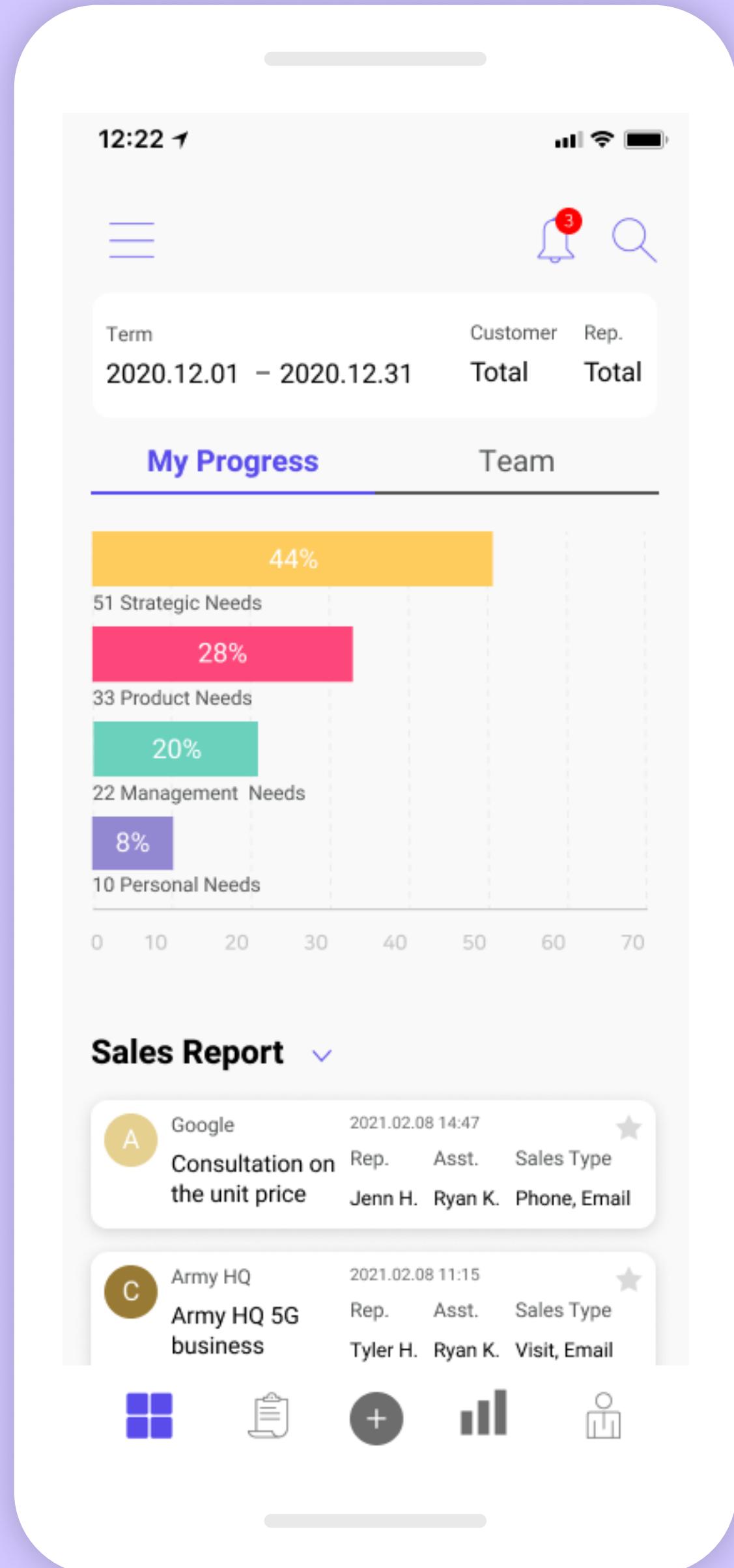
I missed the opportunity to adjust the layout for better usability and use visual hierarchy.



Feedbacks

Our client companies requested an easier interface navigation, less confusion on interactive elements, and more extensive data analysis.

Saleslog Ver. 02

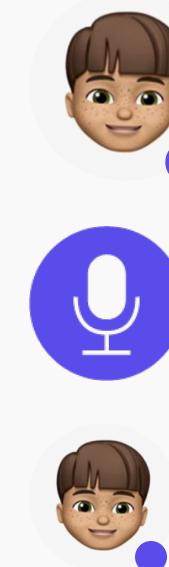


Visual Hierarchy

This time I focused on setting a specific visual hierarchy, with a strict rule of spacings by 8, and consistent UI components.

Spacing

- 8 tiny
- 16 small
- 24 base
- 48 large
- 64 x large



72x72



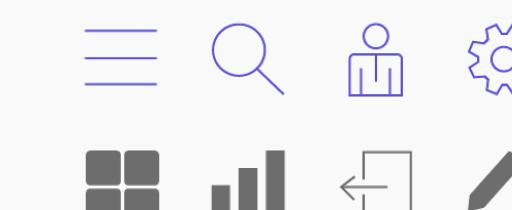
58x58



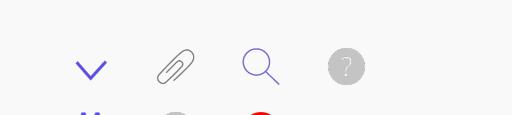
56x56



32x32



48x48



24x24



16x16

Typography

H1	20/24	#000000	Heebo Bold
H2	18/22	#525454	Heebo Bold
H3	16/20	#525454 #C4C4C4	Regular
H4	14/18	#525454	
H5	12/14	#525454 #C4C4C4	Regular Bold
H6	10/12	#525454	Regular
H7	8/8	#6D6D6D	Regular

The screenshot displays a user interface with the following elements:

- Date Range:** Term: 2020 Dec 01 - 2020 Dec 31
- Time Period:** week, month, 3 months, 6 months, year, total
- Buttons:** Save (outline), Submit (solid blue)
- Comment Input:** Add comment
- Customer Profile:** Nexus (A), Price, Consulation, Rep., Asst., Sales Type, Jenn H., Ryan K., Phone, Email
- Summary Table:** Term: 2020.12.01 - 2020.12.31, Customer: Total, Rep.: Total

Search

The image displays three screenshots of a mobile application interface, illustrating various search and navigation features.

Screenshot 1: Login Screen

This screen shows the application's logo, "SalesLog", and a search bar placeholder "email address". Below the search bar are fields for "Username" (placeholder "email address") and "Password" (placeholder "8 digits including letters and numbers"). A "Stay signed in" checkbox and a "Log in" button are also present. At the bottom, links for "Forgot Username/Password" and "Sign up" are available.

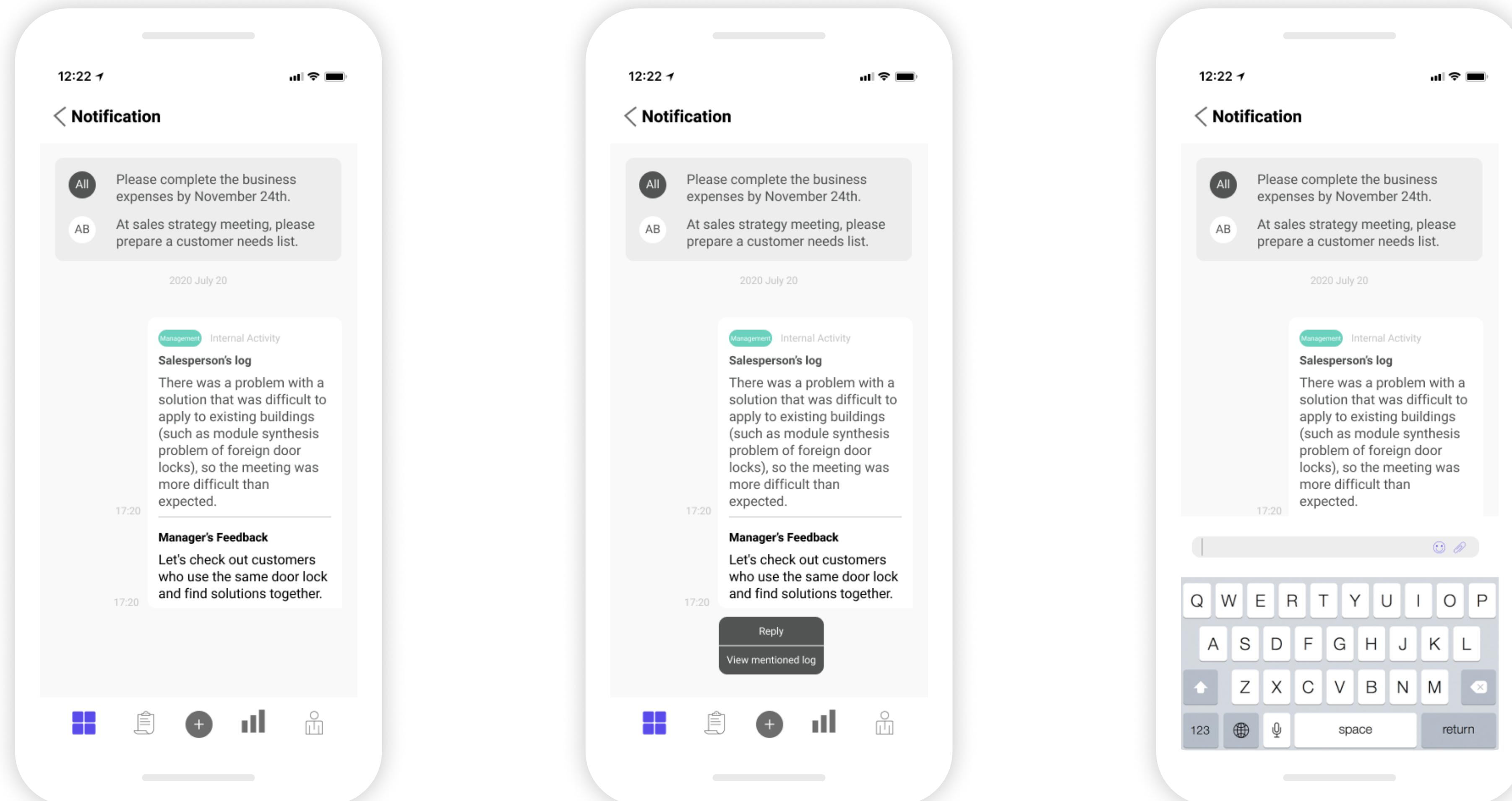
Screenshot 2: Dashboard with Search Bar

This screen shows a timeline from "2020.12.01 – 2020.12.31" and a progress bar titled "My Progress" showing completion levels for different categories: Strategic Needs (44%), Product Needs (28%), Management Needs (20%), and Personal Needs (8%). Below this is a "Sales Report" section with two entries labeled A and C, each detailing a consultation or unit price query. A search bar at the top right shows a count of 3 notifications.

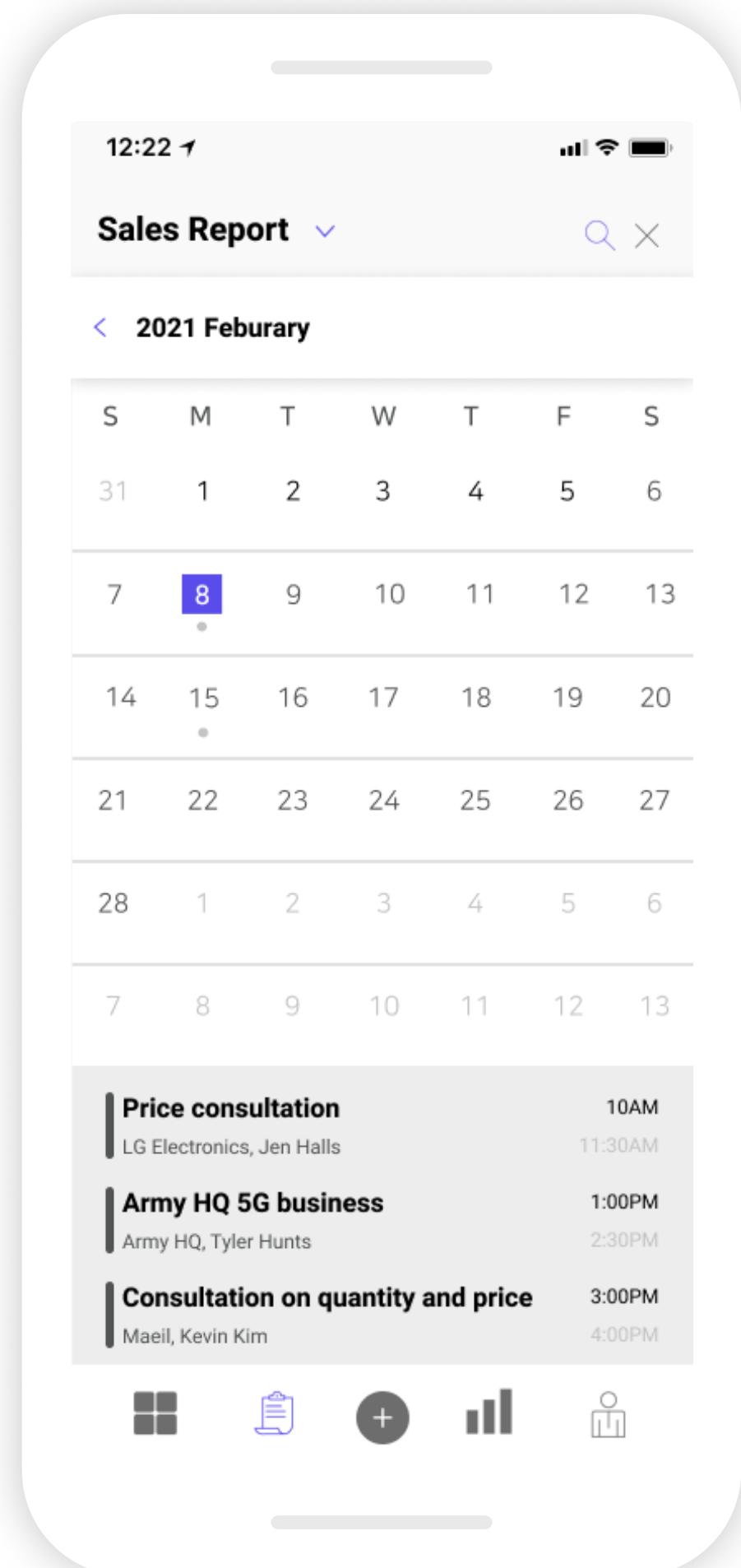
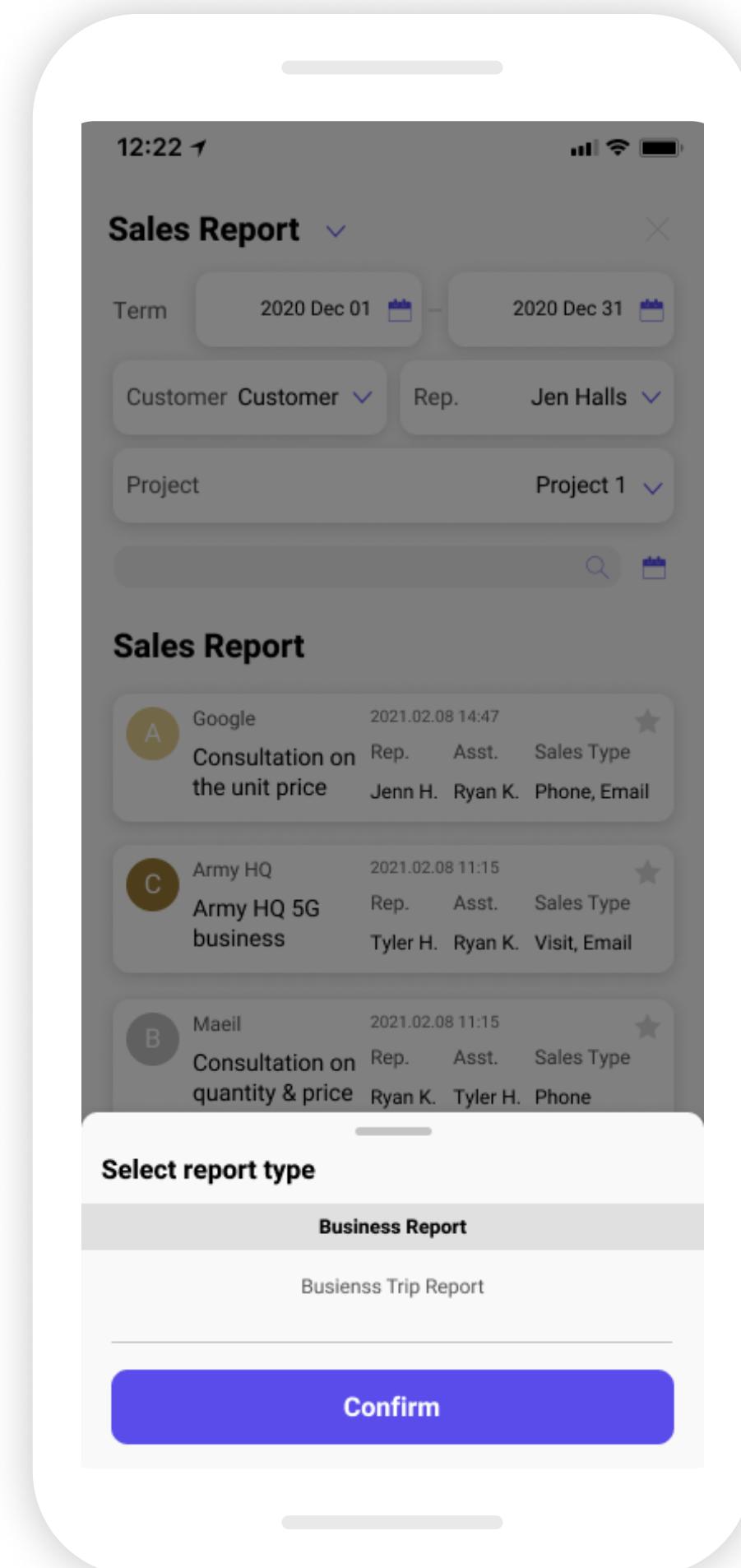
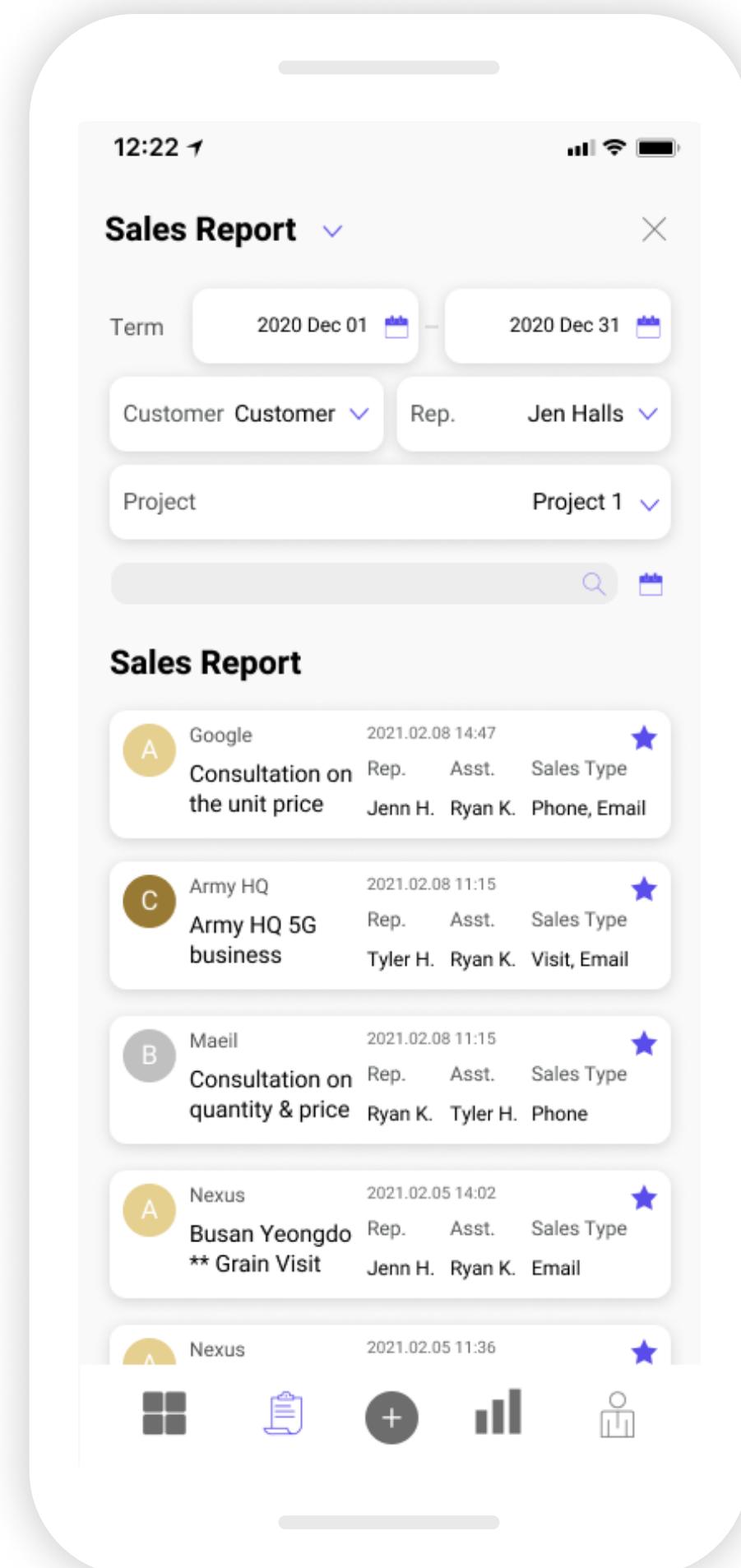
Screenshot 3: Search Results Screen

This screen displays a search interface with a keyboard at the bottom. At the top is a search bar with a placeholder "Recent search terms" and a "Cancel" button. Below the search bar are sections for "Recommended search terms" (Transfer, Keyword, Product) and "Popular keywords by customer rating" (A: Transfer, Keyword, Product; B: TheKlab, How, Date; C: Popular, Covid, Bankrupt). A "Recent Search" section lists "Product" (2020.11.10) and "Strategy" (2020.11.08), with a "Delete all" link. The bottom part of the screen shows the standard iOS-style keyboard.

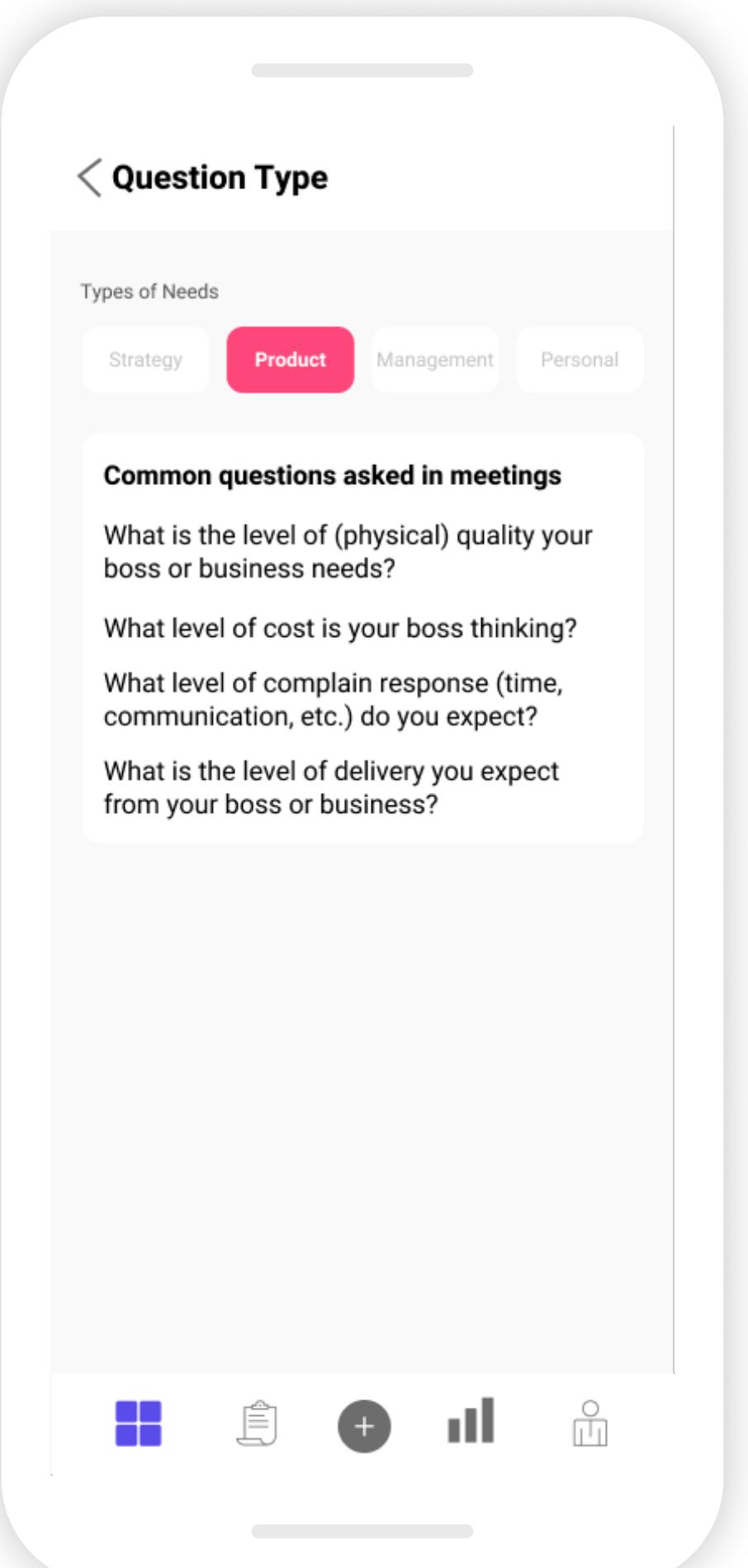
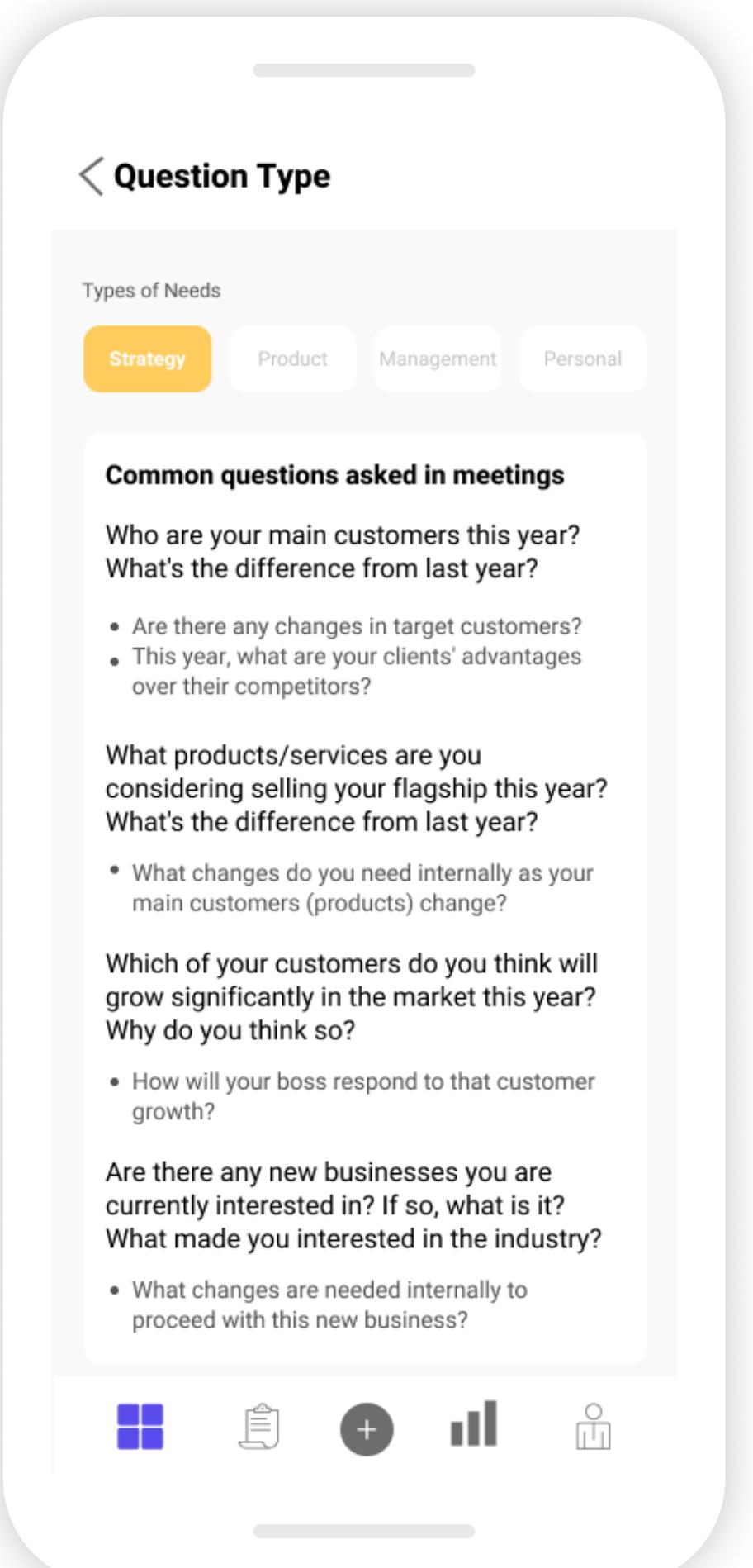
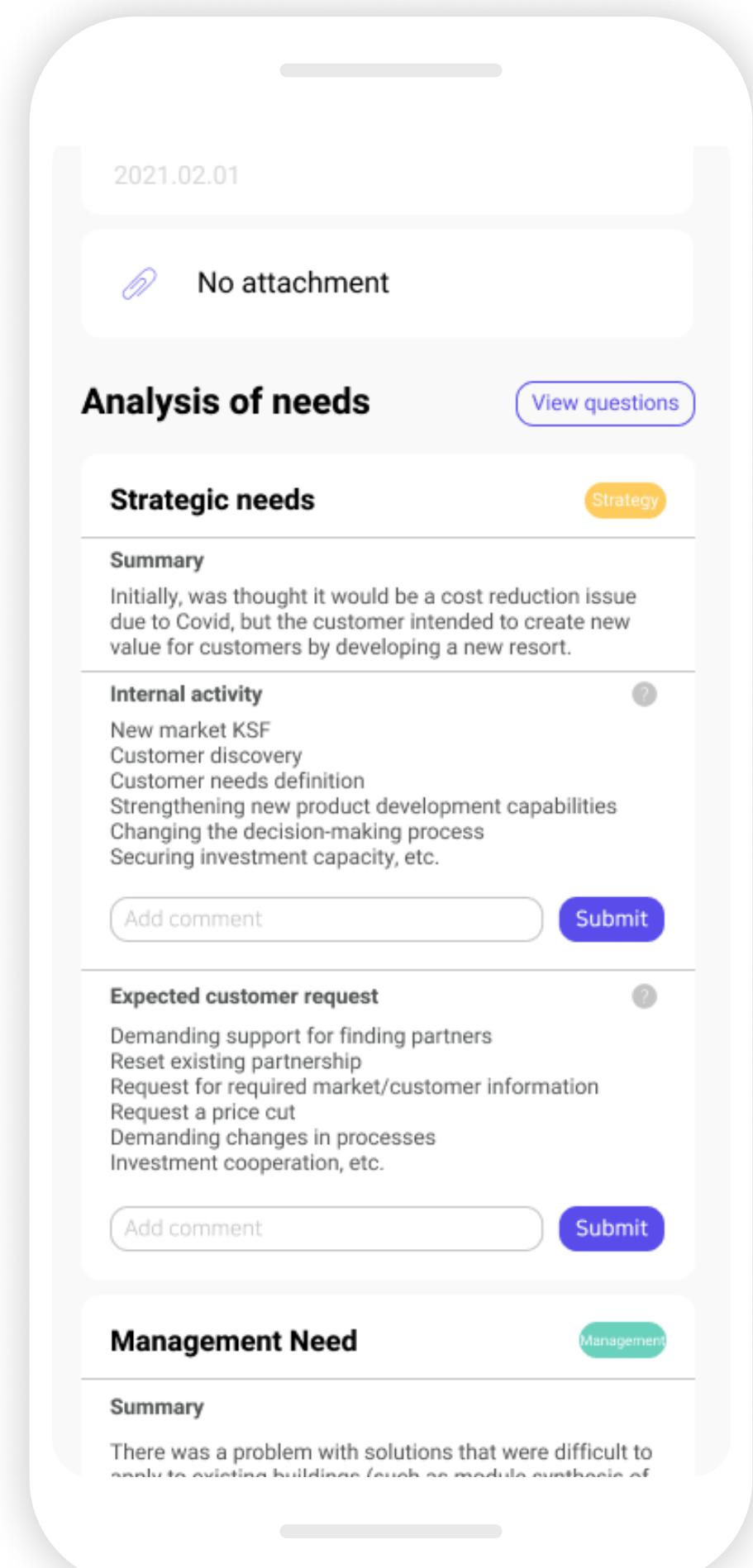
Notification



Schedule



View Question Type



Business Trip Report

The image displays two side-by-side mobile application screens. Both screens have a light gray header bar with a title and a close button. Below the header is a form area with various input fields and buttons.

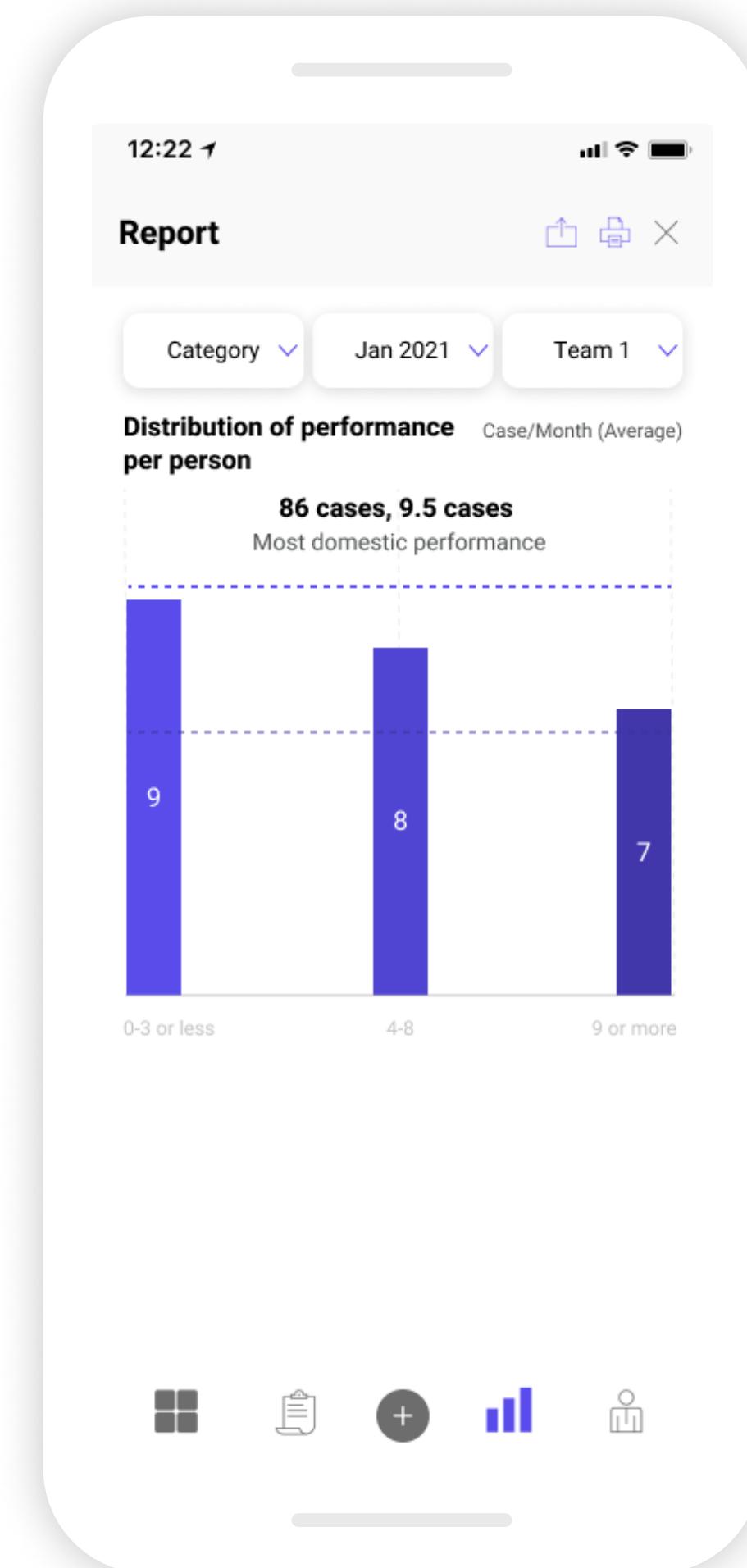
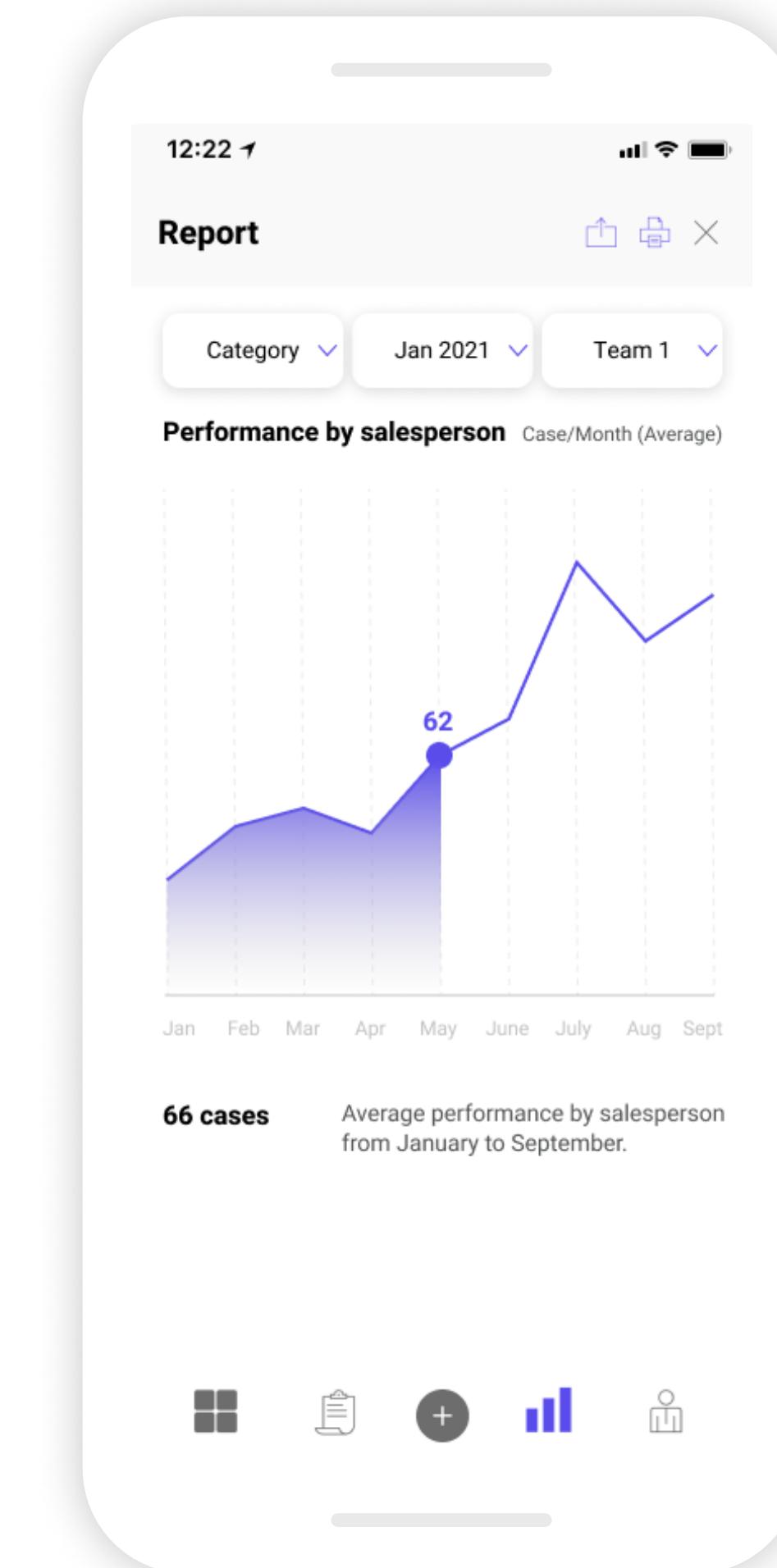
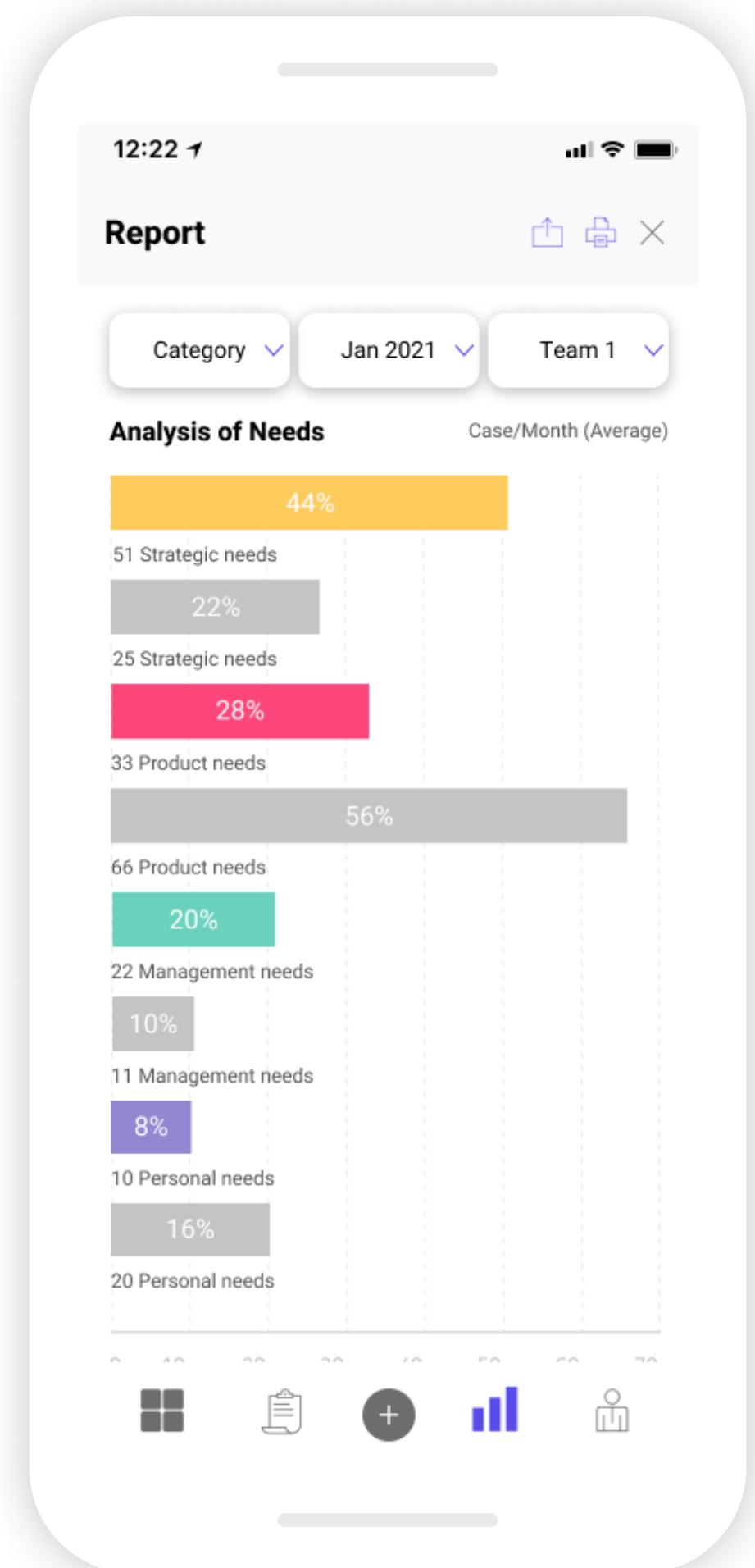
Left Screen (Business Trip Report):

- Report title:** A text input field with a star icon indicating it's required.
- Record date:** A date picker set to "2021 Feb 08".
- Rank:** A dropdown menu showing "A" and "Customer".
- Customer:** A dropdown menu showing "Customer".
- Summary Fields:** Four text input fields labeled "Write a sales summary here", "Share current status", "Write future progress", and "Implications needs".
- Strategy Field:** A text input field labeled "Implication strategy".
- Attachment:** A section with a camera icon, a pen and paper icon, and a microphone icon. It shows "No attachment".
- Buttons:** A large blue "Submit" button at the bottom, and a row of five small icons at the very bottom.

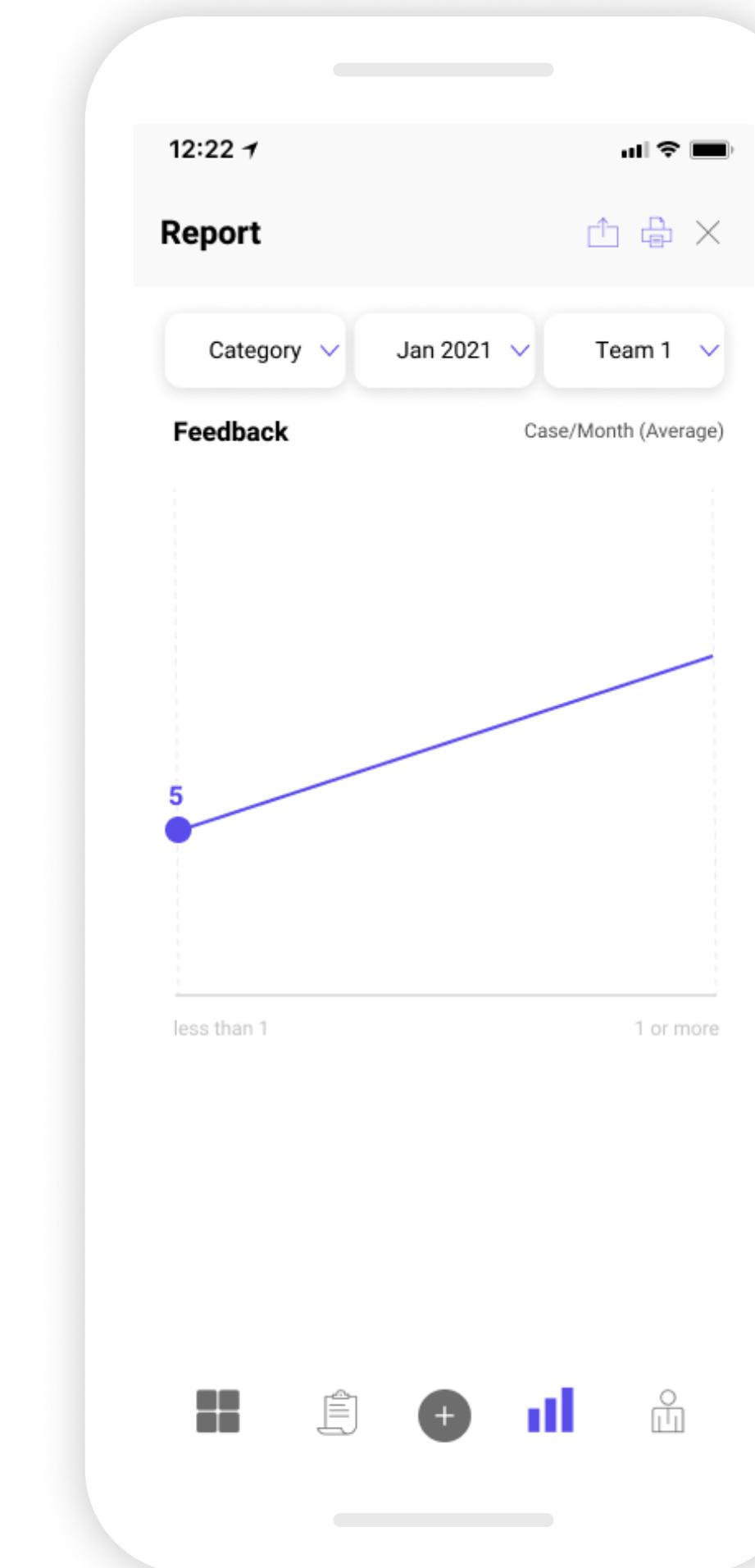
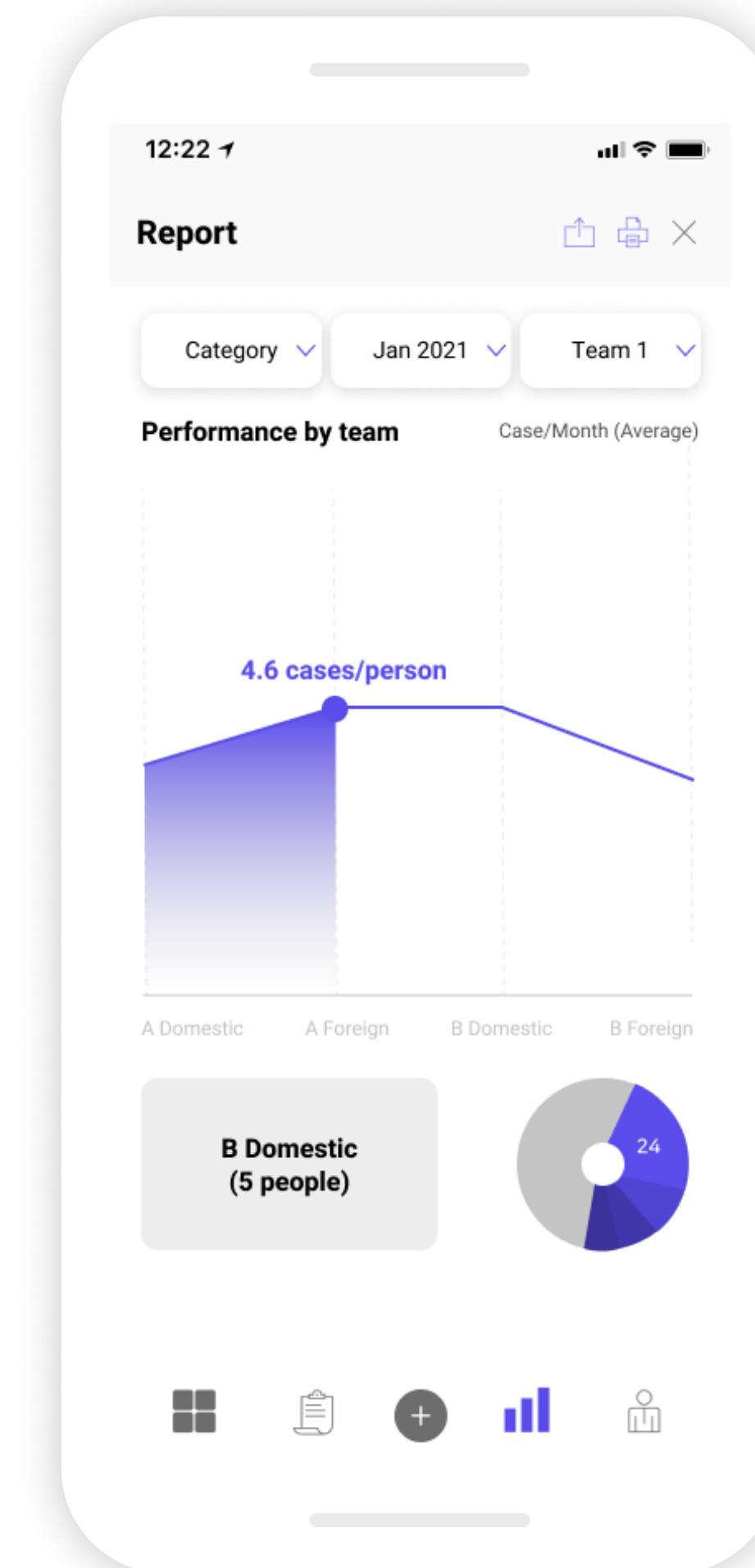
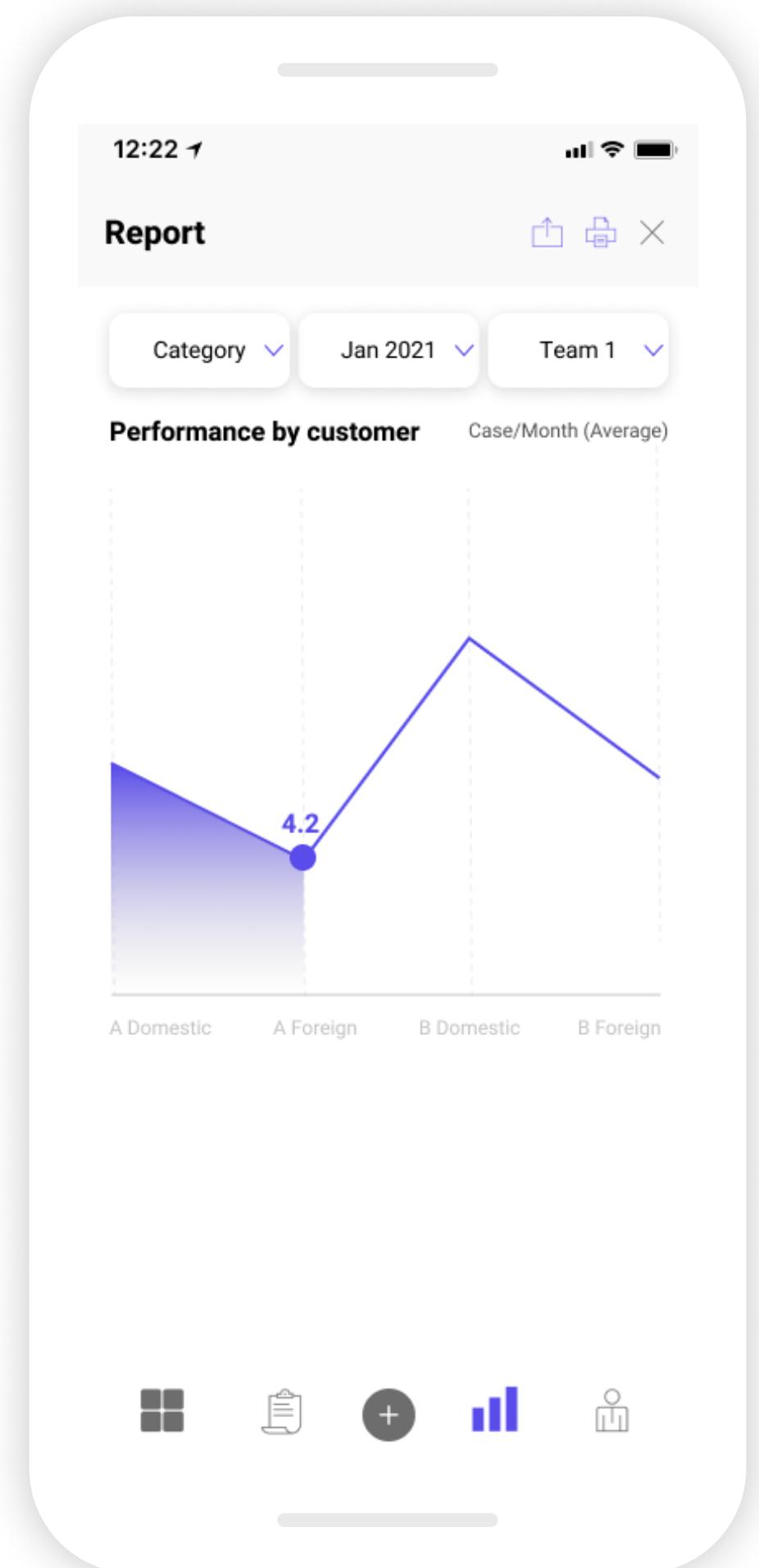
Right Screen (Sales Report):

- Log title:** A text input field with a star icon indicating it's required.
- Record Date:** A date picker set to "2021 Feb 08".
- Rank:** A dropdown menu showing "A".
- Customer:** A dropdown menu showing "Customer".
- Rep.:** A dropdown menu showing "Ryan, K.". (Note: The image shows "Customer" instead of "Rep.", likely a UI error).
- Sales Type:** A dropdown menu showing "Visit".
- Buttons:** Two blue buttons labeled "Load saved log" and "Add Asst.".
- Summary Field:** A text input field labeled "Start your log here".
- Attachment:** A section with a camera icon, a pen and paper icon, and a microphone icon. It shows "No attachment".
- Buttons:** A "Save" button and a large blue "Submit" button at the bottom, and a row of five small icons at the very bottom.

Data Analysis



Data Analysis



Web_Dashboard

The dashboard displays a summary of sales activity from February 1st to 28th. It includes a bar chart showing the distribution of customer needs across five categories: Strategic needs (44%), Product needs (28%), Management needs (20%), Business policy (8%), and Personal needs (2%). Below the chart is a list of recent sales reports.

Sales Report

- A Google Consultation on the unit price (2021.02.08 14:47) - Rep. Asst. Sales Type: Jenn H. Ryan K. Phone, Email
- C Army HQ Army HQ 5G business (2021.02.08 11:15) - Rep. Asst. Sales Type: Tyler H. Ryan K. Visit, Email
- B Mail Consultation on quantity & price (2021.02.08 11:15) - Rep. Asst. Sales Type: Ryan K. Tyler H. Phone
- A Nexus Busan Yeongdo ** Grain Visit (2021.02.05 14:02) - Rep. Asst. Sales Type: Jenn H. Ryan K. Email
- A Nexus Site joint visit (2021.02.05 11:36) - Rep. Asst. Sales Type: Jenn H. Ryan K. Phone, Email
- B Gapulwood Consultation on business policy (2021.02.05 10:58) - Rep. Asst. Sales Type: Ryan K. Jenn H. Visit, Email
- B ABC MDF sales expansion (2021.02.05 10:58) - Rep. Asst. Sales Type: Ryan K. Jenn H. Visit, Phone, Email
- A L Electronics Supply of water after Covid (2021.02.08 14:47) - Rep. Asst. Sales Type: Ryan K. Jenn H. Phone, Email

The sales report section shows a summary of interactions with Google, including a consultation on unit price. A summary notes that while there was a cost reduction issue due to Corona 19, the customer intended to create new value by developing a resort in Jeju Island.

Sales Report

Consultation on the unit price

Customer	Google	Writer	Jenn Halls
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Feedback

Kevin, Hu telecop Department Team A

2020 July 20

Great work!

I don't see any problems. Please continue.

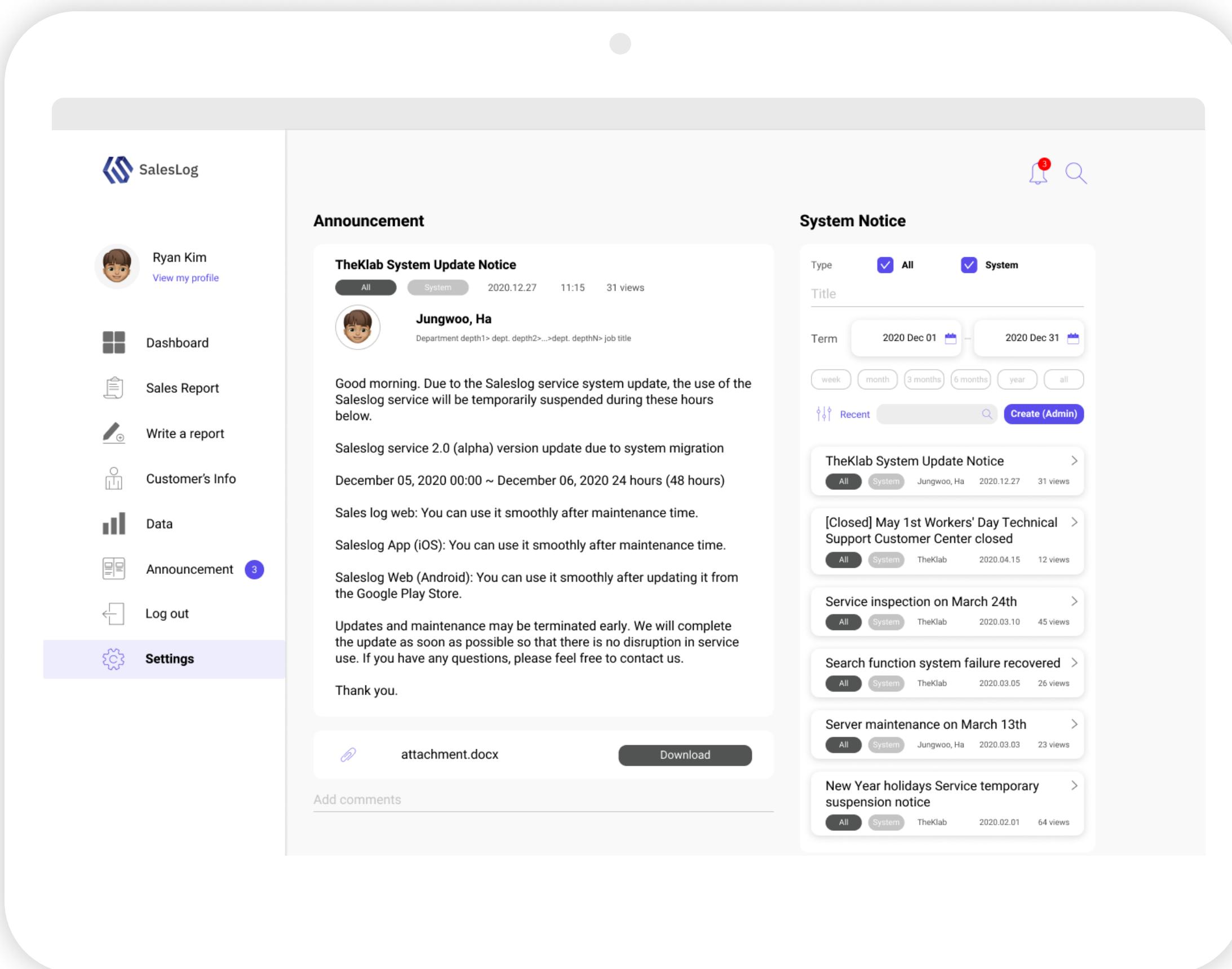
Okay! thank you

17:21

2021.02.01

No Attachment

Web_Annoucement



TheKlab System Update Notice
Good morning. Due to the Saleslog service system update, the use of the Saleslog service will be temporarily suspended during these hours below.
Saleslog service 2.0 (alpha) version update due to system migration
December 05, 2020 00:00 ~ December 06, 2020 24 hours (48 hours)
Sales log web: You can use it smoothly after maintenance time.
Saleslog App (iOS): You can use it smoothly after maintenance time.
Saleslog Web (Android): You can use it smoothly after updating it from the Google Play Store.
Updates and maintenance may be terminated early. We will complete the update as soon as possible so that there is no disruption in service use. If you have any questions, please feel free to contact us.
Thank you.

attachment.docx Download

Add comments

Ryan Kim View my profile

Dashboard Sales Report Write a report Customer's Info Data Announcement 3 Log out Settings

System Notice

Type All System

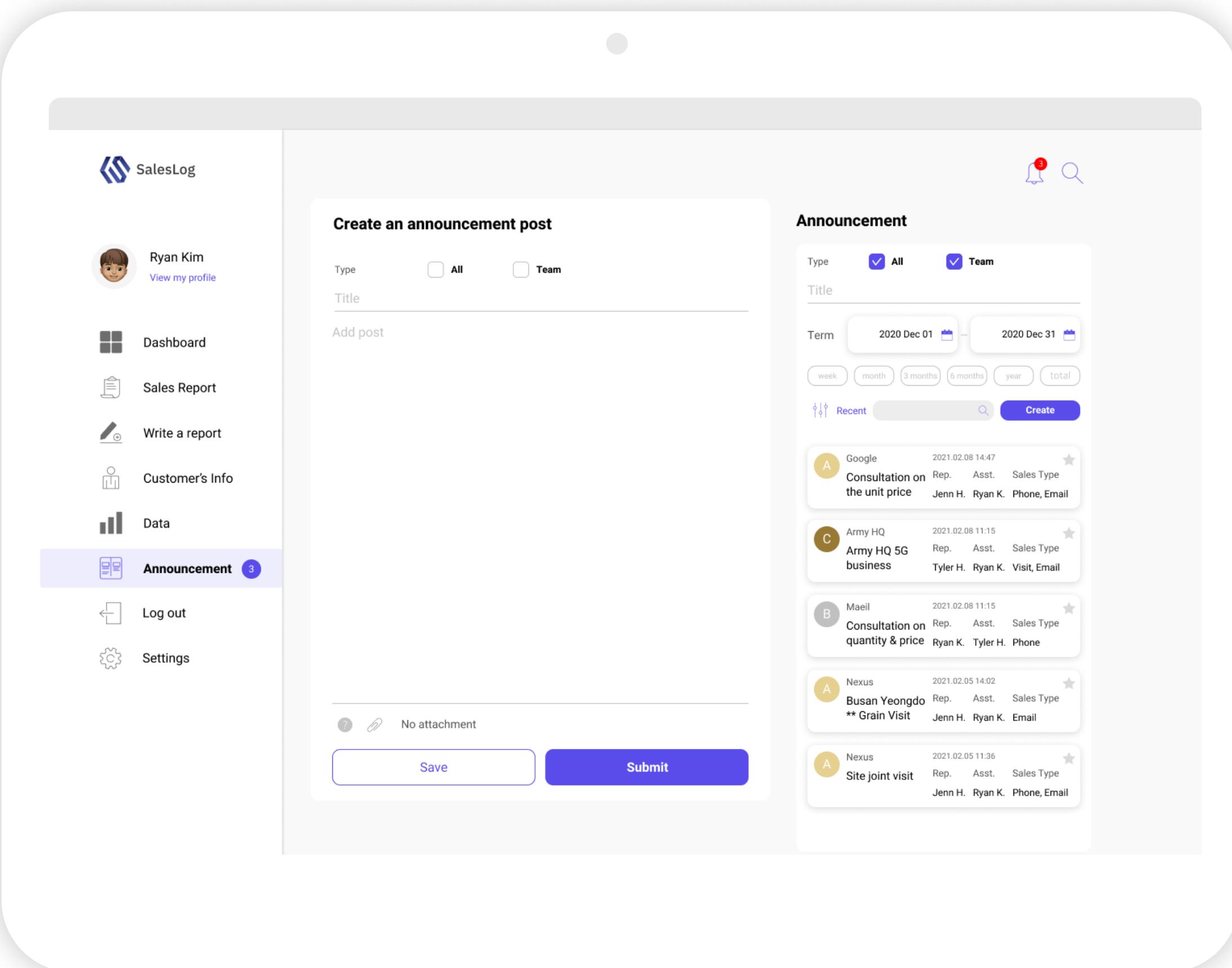
Title

Term 2020 Dec 01 2020 Dec 31

week month 3 months 6 months year all

Recent Create (Admin)

TheKlab System Update Notice [Closed] May 1st Workers' Day Technical Support Customer Center closed Service inspection on March 24th Search function system failure recovered Server maintenance on March 13th New Year holidays Service temporary suspension notice



Create an announcement post

Type All Team

Title

Add post

No attachment

Save Submit

Ryan Kim View my profile

Dashboard Sales Report Write a report Customer's Info Data Announcement 3 Log out Settings

Announcement

Type All Team

Title

Term 2020 Dec 01 2020 Dec 31

week month 3 months 6 months year total

Recent Create

A Google Consultation on the unit price Rep. Asst. Sales Type Jenn H. Ryan K. Phone, Email
C Army HQ Army HQ 5G business Rep. Asst. Sales Type Tyler H. Ryan K. Visit, Email
B Maeil Consultation on quantity & price Rep. Asst. Sales Type Ryan K. Tyler H. Phone
A Nexus Busan Yeongdo ** Grain Visit Rep. Asst. Sales Type Jenn H. Ryan K. Email
A Nexus Site joint visit Rep. Asst. Sales Type Jenn H. Ryan K. Phone, Email

Feedbacks

Our client companies were particularly in fond of the notification feature, and the redesign of the interface. They liked how the web and mobile interfaces are consistent with one another considering the age group of their users.

Thank you!

Prepared by Soeun Yoon
syoon07@risd.edu