

Journey Map

Scenario:

Chester is a sales manager at a retail roofing company and uses contacts to monitor customer interactions with the business. Chester has found success in requiring his sales team to make a certain number of calls per day and wants to ensure his team is completing those goals.

Expectations:

- ✓ Retrieve data/info entered into a contact by his team
- ✓ Utilize filters to view specific data sets
- ✓ Monitor his sales team's contact updates and entries

Chester

Large Retail Roofing
Sales Manager



GOAL SETTING

COMMUNICATION

EXECUTION

TRACKING

GOALS

Chester sets a specific daily call requirements for his sales team based on the company's targets and previous performance data.

Chester communicates the call requirements to his sales team and emphasizes the importance of meeting them to reach revenue goals.

Chester implements the call requirements, and his team makes the calls.

Chester tracks the sales team's progress to ensure they are meeting the daily call requirement.

ACTIONS

- Chester reviews his team's old performance data
- He determines a reasonable number of calls to require his team to make per day

- Chester explains the call requirements
- Lets them know these requirements will help them and the company make more money.

- Employee calls the customer
- Logs the call with date/time
- Includes detailed notes on the conversation.

- Chester views his team's call logs
- Chester views his team's contact notes

TOUCHPOINTS

- Phone, Computer

- Phone

- Phone

- Phone, Computer

FRUSTRATIONS

- Some of the salespeople on Chester's team are not calling enough leads daily.

- Chester's sales team is frustrated with manually recording the number of phone calls they make.

- His sales team finds it cumbersome and difficult to manually add call logs to contacts

- Chester has difficulty monitoring an individual salesperson's contact updates and entries.

OPPORTUNITIES

- How might we offer goal setting suggestions to managers based on their team's performance?

- How might we present goals the user must complete before the end of a day?

- How might we present managers with notifications when one of his team members finishes adding a new entry to a contact.

- How might we give a manager an overview of all employee activity?

Journey Map

Scenario:

Jonas is a retail roofing salesman that uses contacts to help remember important information about the customer. Today he received a call from a past customer, and he wants to review the information previously entered into the contact’s notes.

Expectations:

- ✓ Ability to organize contacts
- ✓ Record call logs of conversations with customers
- ✓ Record notes on customers to help with recall

Jonas

Small Retail Roofing
Sales Rep/Prod Manager



DISCOVERY

RESEARCH

REFLECTION

INTERACTION

GOALS

Jonas receives a call from a customer he has worked with in the past, which triggers his need to access his contact notes on this customer to help refresh his memory.

Jonas searches through his contact list to find the customer he is looking for. He reads the notes he left on the individual contact to remind himself of any information he thought was important to document from the last project.

Jonas reflects on the information he has found, such as the customer’s specific preferences, and uses this information to improve his connection with the customer.

Jonas interacts with the customer, using the information he has gathered to create a more personalized experience. He provides recommendations based on the customer's previous preferences and discusses how he can assist with their current needs.

ACTIONS

- Jonas receives a call
- He tries to remember the returning customer but needs his memory refreshed

- Jonas opens the contacts feature
- He searches for the specific customer and reads the contact notes

- Jonas finishes reading the notes and looks back on the last job experience with this customer.

- Jonas uses the information in his notes to ask how the last project’s work is holding up and reestablish his connection with the homeowner.
- He hangs up and updates his call log with details on the conversation.

TOUCHPOINTS

- Phone

- Phone, Computer

- Phone, Computer

- Phone

FRUSTRATIONS

- When Jonas gets a call from an old customer and wants to pull up their notes, they are often not found where he expects them to be.

- Jonas is often unsure if an existing contact has Notes or Log entries in it when he first enters the contact.

- Jonas has to go back and forth between the job and the contact because he cannot add a contact note from the job.

- Jonas often forgets to log his call because he is usually dealing with multiple customers in a short amount of time.

OPPORTUNITIES

- How might we recognize a contact number if it is calling and pull up their info automatically?

- How might we present the contacts info differently so some of the data like call logs and notes aren’t hidden at times?

- How might we give users quick access to the notes taken on an old contact if the customer calls for them again to get more work done?

- How might we prompt the user to log their call right after they hang up?

Lionel

Age: 40

Occupation: Sales Rep

Location: Milwaukee, WI

Archetype: Insurance Roofing



“More customers equals more money for me and my company. I need a tool that will help my jog my memory for people I have spoken to in the past in order to re-establish a relationship and remind myself who I’ve enjoyed working with in the past.”

BIO

Lionel is a 40-year-old man who lives in Milwaukee with his wife and four children. He has been working as an insurance roofing salesman for 15 years and has developed a deep understanding of the industry. Lionel is an outgoing person and enjoys meeting new people. He is also a tech-savvy individual and appreciates a user-friendly mobile interface that he can easily navigate when he is on the go.

Lionel is motivated by his commissions so he prioritizes speed and customer volume when it comes to jobs. His commissions allow him to provide for his family and enjoy a comfortable lifestyle. He loves the challenge of winning over new businesses and providing solutions to his clients’ roofing problems. Lionel works for a large company that follows storms across the country and offer their roofing services to storm affected areas. Lionel moves quickly through an area after a storm, scanning the area for potential jobs. If a potential customer seems unsure or hesitant he moves onto the next home because he needs to keep it moving.

Lionel’s biggest frustrations involve dealing with insurance companies. He does his best to maintain his relationships with the adjusters, but they are constantly low-balling him for estimates on projects. Lionel likes to keep notes on different adjusters that are known to give him low estimates so that he knows to avoid them when he can.

Lionel uses AccuLynx’s Field app while he is out on the road. He would love the ability to search his contacts by keywords and areas so that he can search for specific adjusters and local roofing companies that he has previously tagged for the areas he travels to. He also makes sure to develop good relationships with local roofing businesses so that they may be receptive to the idea of temporarily being bought into if a storm has hit their area.

GOALS:

- Filtering contacts by area or other key words that would allow him to look up insurance adjusters he has marked down for the area he is in.
- Referencing notes taken for different contacts so that they can remind him of previous experiences he’s had with the contact.
- Keep relationships with local roofing businesses and keep track of when they may have worked together in the past and how the experience went.

BRAND:



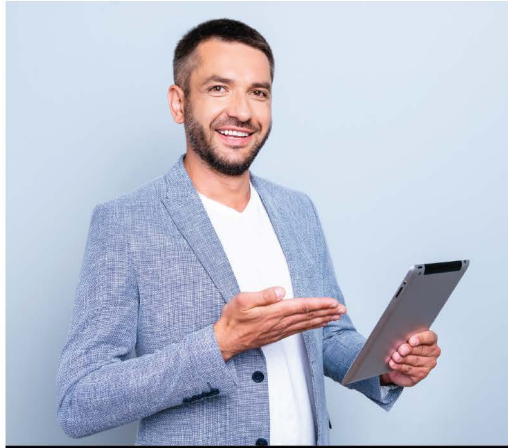
Jonas

Age: 34

Occupation: Sales Rep

Location: Grayslake, IL

Archetype: Small Retail Roofing



“I’m in the business of building relationships and I need a tool that will help me manage these efficiently. I want something that can let me easily manage a large list of contacts and store important information about them that will allow me to maintain relationships with them for years to come.”

BIO

Jonas is in his 30’s and loves living and working in the small town of Grayslake. He grew up in Grayslake and knows most of the families in the surrounding area. Jonas is outgoing, friendly, and personable and he uses skills to connect and build relationships with the people in his town. He loves that the company he works for is located in the same town he lives in because it allows him to interact and do business with people he is already familiar with.

Living in the Midwest, Jonas knows that big storms are common. He always makes sure he is the first person reaching out to homeowners to see if they need any repairs after a major storm. Jonas is a versatile and experienced sales professional that is responsible for generating leads and selling roofing services to residential clients. Jonas wears many hats and is involved in various aspects of the business, from managing the sales pipeline to ensuring timely project completion and customer satisfaction.

Jonas has been in the roofing industry for over a decade and is passionate about what he does and takes pride in providing his clients with the best possible experience because he genuinely cares about the people he works with. He is a great listener and communicator and acts as a consultant to the customer throughout the whole project. Jonas’ greatest skill is his ability to build and maintain relationships with his customers, which is why he is the go-to salesman for roofing projects in the area.

Jonas uses AccuLynx’s Field app to log important details about customers that allow him to maintain a strong relationship with the homeowners over time. He wishes he could quickly get access to important customer details immediately when he opens the contact. Jonas has a large list of contacts and it drives him bananas when he finds duplicate contacts in his list because they make it messier and more chaotic. Jonas also needs the ability to require specific fields to be filled out in a contact so that when his coworkers add contacts they collect all the necessary information.

GOALS:

- Assure that all important information for a contact has been filled out before it is saved.
- When he calls the customer he would like to have all the notes he has for the homeowner at the ready to reference during the call.
- Sets field requirements in order to save a contact.
- Having an easy way to manage his contact list and check for duplicates.

BRAND:



Chester

Age: 53

Occupation: Sales Manager

Location: Madison, WI

Archetype: Large Retail Roofing



"I manage a large team and I need to make sure they are all using the steps I trained them with to build relationships. I need a way to monitor the information each of them adds to specific jobs and what information is new."

BIO

Chester is a middle-aged man in his early 50s. He is married and has two children, both of whom are in high school. He lives in the suburbs and commutes to work everyday. He has been working in sales for over 20 years and has built a solid reputation in the industry. After 15 years of actually selling, he now manages a team of 10 salesmen for a large retail roofing company. Chester is highly motivated by his team hitting their sales targets and likes to set manageable goals for his team to accomplish to get them to hit their targets.

Chester takes pride in the quality of work his company provides and wants to ensure that every customer is satisfied with their experience. Chester spends some time building relationships with his clients, but his priority is making sure his team manages their contacts list efficiently and effectively. He has very specific requirements he wants for each new potential customer and he needs to be able to monitor all the information his salespeople have inputted into the app. If information is inaccurate it can affect sales and also the company's relationship with the customer. Chester likes to review all information his salespeople add to jobs to ensure that each job goes smoothly and there are not miscommunications.

Chester is hardworking and dedicated professional who is always willing to go the extra mile to meet his team's sales targets. He is an excellent communicator and can explain concepts in simple terms that are easy for clients to understand. Overall, Chester is a seasoned professional with a strong work ethic and a dedication to providing excellent customer service.

He is often thought to be a cold person because he is very stern with the people he manages, but he simply wants to bring the best out of each team. Chester has a difficult time knowing when his team has added new information into a job. He wishes there was a way to be notified when someone on his team has added new information so that he can review it.

GOALS:

- Oversee a bunch of users at once to see what information is being added.
- To be notified when one of his team members has added a new contact or updated an existing one so he can review it.
- Would like to set specific field requirements for contacts before they can be saved so that his team knows what he is looking for in each entry.

BRAND:

