

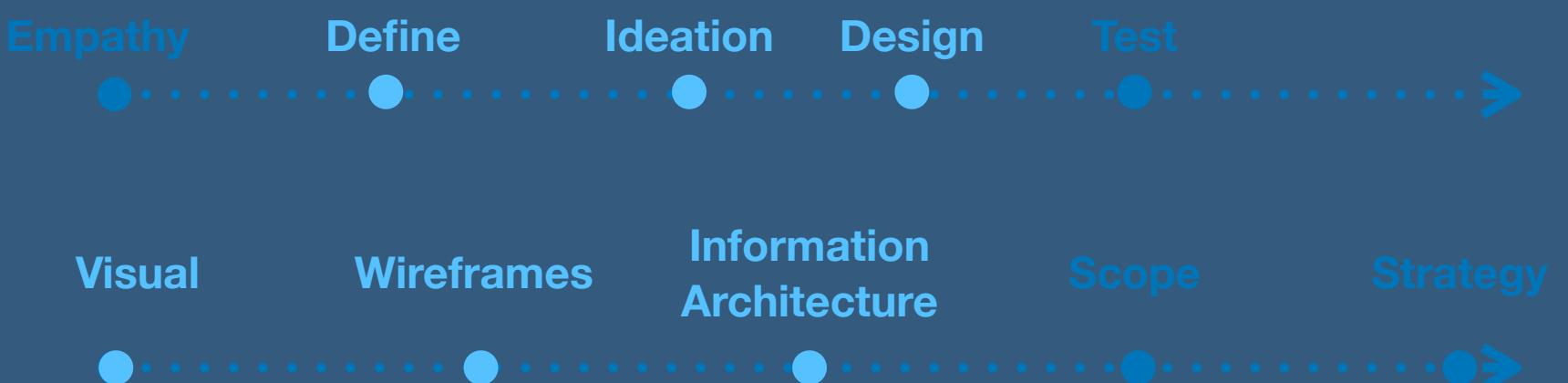
## SAP Anywhere Stream Customer Relation Management (CRM) IOS APP

Assist sales manage their clients , activities and profit

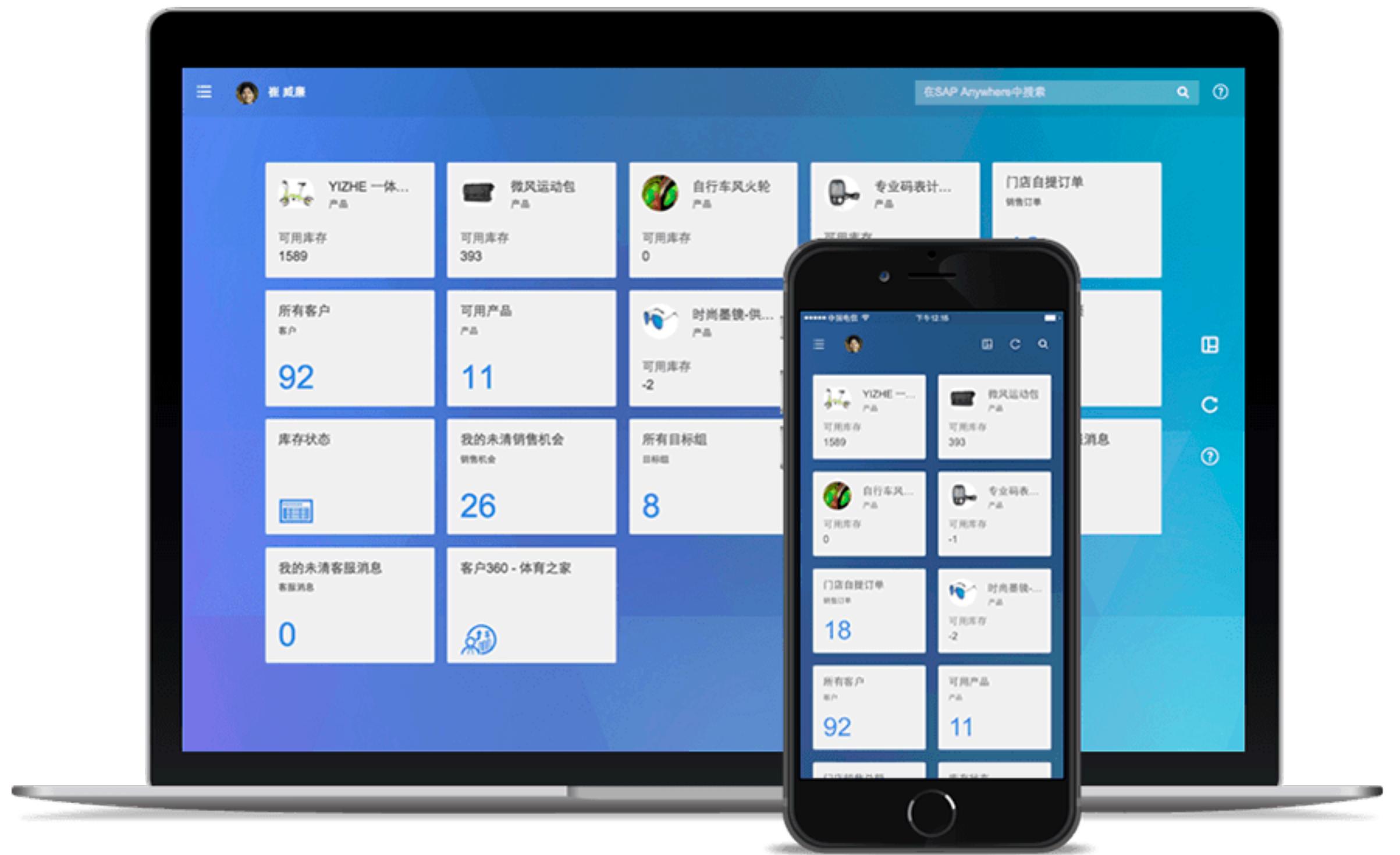
Users: Sales

Period: 10/2016 - 04/2017

Role: UX/ Research



## PROJECT | SAP Anywhere Stream



SAP Anywhere backend --> CRM App

### PRODUCT GOAL

- Enrich the SAP ERP ecosystem, enable SAP clients who use Anywhere backend system, to manage their clients and update data with mobile device anytime.

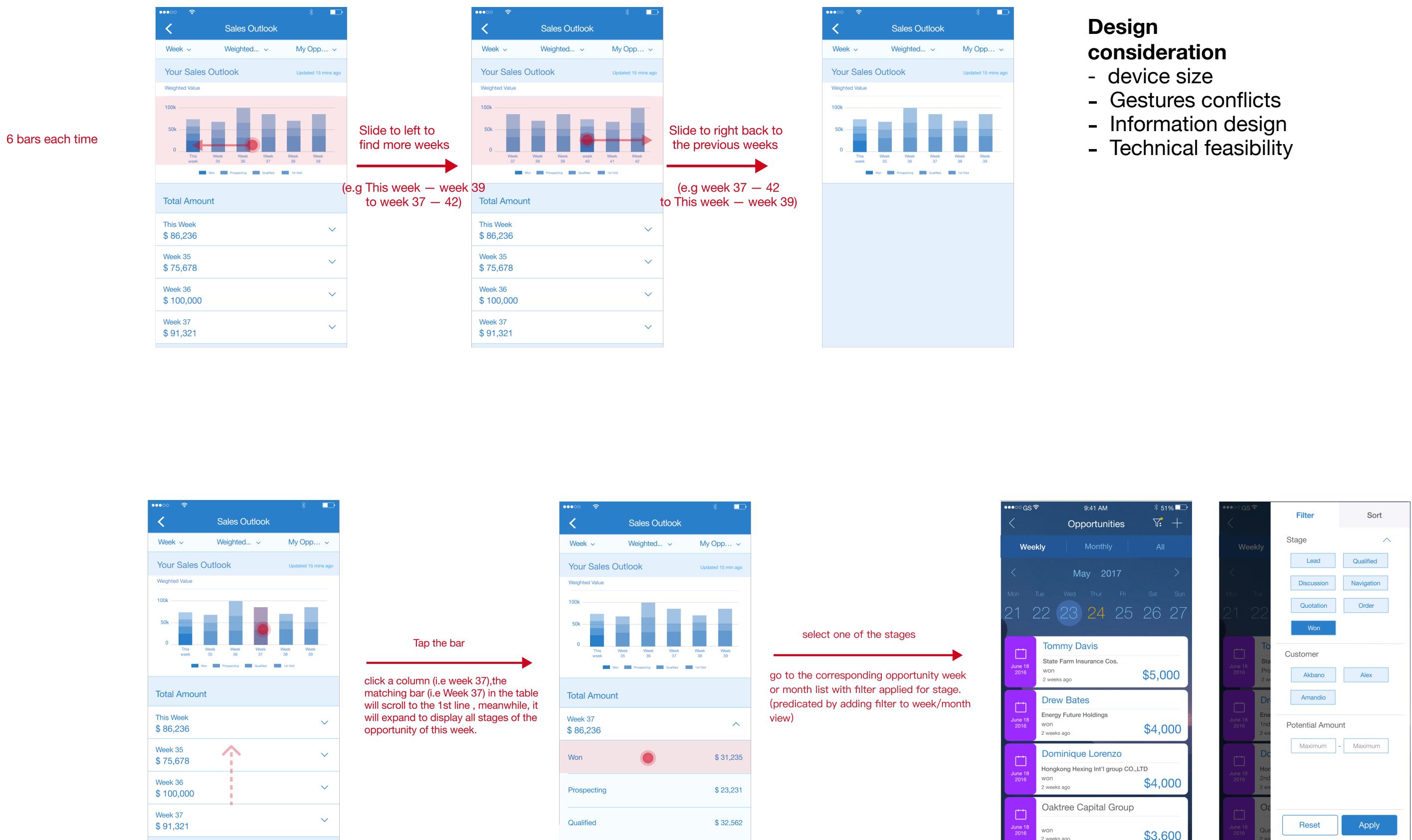
### DESIGN & RESEARCH GOAL

- Fluent user experience, consistent with backend ecosystem.
- Define user requirements —> optimise the information architecture.

### MY ROLE

- **Design solution:** design low-fi prototype to map out the added requirement. Iterate the product with new features.
- **Evaluation:** walk through design proposals with project manager and development team on a daily basis.
- **Design spec:** create design spec and hand it over to UI designer and development team
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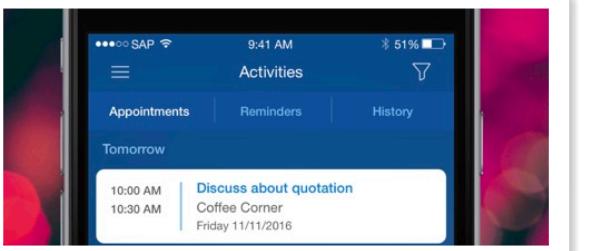
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## Interview

### Goal

- Redesign the information of activities



### Structure

- working environment
- priority
- Scenarios (When. Where)
- Existing tools

### Report

Topic: Understand Activity  
Purpose: To polish the activity list design in Stream APP  
Type: Interview/Competitor research  
Timeline: March 2017

**Who**  
Organization Size  
Team Size  
Working Experience  
Industry/Product  
Sales cycle

**What (Content in list and detail)**  
How does he perceive an activity? Abstract the structure/key information/content/sequence;  
Need probe  
How does he perceive the whole day activity? Abstract the key information/content/sequence;  
Need probe  
*\*Things might be covered in probe phase: Colleagues, Deals, Importance, Weighted Amount, Location, Customer, Start Time, End Time, Duration, Topic, Possibility of Overlap...*

**When/Where (Card notification)**  
Frequency of creation; When/Where  
Frequency of checking; When/Where  
Whole day arrangement  
Weekly/Monthly arrangement  
Next activity  
Important activity

**Why/How (Existing Habit)**  
Current using tool;  
Necessity of the tool;  
Motivation:  
Evaluating about the tool; Is that part of your CRM tool? Why  
Pain point- E.X Missing something? No reminder? hard to create new? Can't Offline?  
Good point- Mobility? Share with others? Analytics?

**Interview Report**

1. 销售通常分为售前和销售。  
售前负责向客户介绍产品的功能和参数，对客户进行调研，根据客户需求作出销售方案。销售负责洽谈价格。  
2. 现阶段，调研对象一个人同时负责售前和销售。其所在部门有4个销售人员。

3. 销售流程。  
整个工作大体有四个阶段。  
(1) 渠道阶段。这个阶段，客户通过线上三方平台，代理商找到销售电话进行联系。或者由销售通过技术分析找到潜在客户并向其推荐产品并进行报价。  
(2) 电话确认阶段。了解需求，并将客户添加为 lead。  
(3) 售前和销售阶段。售前和销售合作为客户定制方案。方案经常会以 ppt 的形式展示。这个阶段通常持续 2~3 天，最多不超过一周。对于销售来说越快越好。  
(4) 约谈客户。进行进一步讨论，每次会议讨论后会根据用户需求修改方案。

4. 销售活动周期。  
没有特定的时间，根据具体订单而定。以几个月，几天或者几周为单位都可能。

5. 提前通知客户的内容。  
方案主题，时间，地点，目的。

6. 正在使用的工具。  
Excel-记录商机，销售线索。Outlook-管理日程。微信，电话-日常工作交流。

7. Activity  
(1) High priority 的任务通常都有截止日期；low priority 的没有，有时间再处理。经常需要调整任务 priority，比如会为了重要的会议会推掉出差。  
(2) 一个销售活动时间跨度长，很少有零碎的活动，通常以半天为单位。同时，日程安排灵活，经常需要改动。放弃以前的 CRM 软件是因为改动销售活动的信息非常麻烦。

8. Call  
会提前一周查看下一周的活动。不会提前安排给客户打电话的时间。

9. Reminder  
通常为小事件（如：提醒打电话，回邮件）。  
小事件会设置为整天提醒，不依靠 reminder 记录。

10. 放弃用过的 CRM 软件。  
(1) 不同的同事共享 contact, customer。会同时有同事创建重复的 contact 和 customer，创建后会有错别字难以辨认。  
(2) 无法自动生成分析报表。  
(3) 对于一个 opportunity，不同的 activity 找其公司对应的不同的负责人。Crm 不方便寻找。

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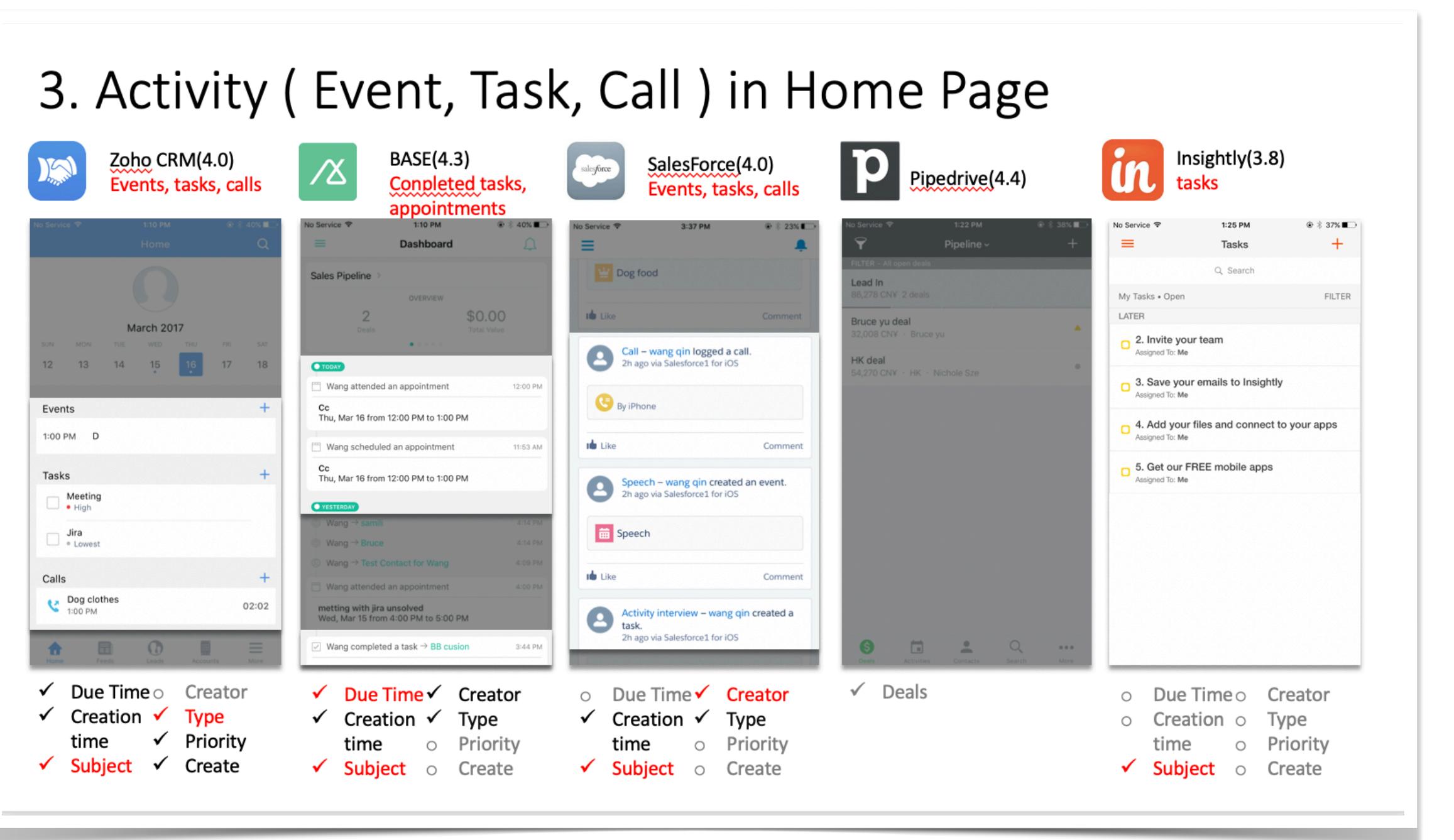
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Shared information

## 3. Activity ( Event, Task, Call ) in Home Page



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- If there is activity-related item in home page, the following info are definitely added ;
  - ✓ Subject (title of the activity)
  - ✓ Type (task/appointment/call)
  - ✓ Due time
- Based on different target users, each product put their emphasis on different info. (see the item marked red in the last slide)
  - ✓ E.g Zoho- subject, due time/ BASE-due time, subject / salesforce- creator, subject etc
- UI
  - ✓ Timeline
  - ✓ Card
  - ✓ List

## 4.1 Activity-Task/Reminder

Zoho CRM(4.0)	BASE(4.3)	SalesForce(4.0)	Pipedrive(4.4)	Insightly(3.8)
✓ Task (email, Call, Meeting, send letter, product demo, customized)	✓ Calendar (task, appointment)	✓ Task, event	✓ Activities (call, meeting, task, deadline, email, lunch)	✓ Task (follow-up, get started, meeting, phone call, to-do)
✓ Category/subject	✓ Category/subject	✓ Category/subject	✓ Category/subject	✓ Category/subject
✓ Due date	✓ Due date	✓ Due date	✓ Due date	✓ Due date
✓ Contact	✓ Contact	✓ Contact	✓ Contact	✓ Contact (add in opportunity)
✓ Deals	✓ Deals	✓ Deals	✓ Deals	✓ Deals (same)
✓ Assignee/owner	✓ Assignee/owner	✓ Assignee/owner	✓ Assignee/owner	✓ Assignee/owner
✓ Comments/Description	✓ Comments/Description	✓ Comments/Description	✓ Comments/Description	✓ Comments/Description
✓ Alert/Repeat/ Email notification	✓ Alert/Repeat/ Email notification	✓ Alert/Repeat/ Email notification	✓ Alert/Repeat/ Email notification	✓ Alert/Repeat/ Email notification
✓ Priority	✓ Priority	✓ Priority	✓ Priority	✓ Priority
✓ Progress	✓ Progress	✓ Progress	✓ Progress	✓ Progress
✓ Status	✓ Status	✓ Status	✓ Status	✓ Status
✓ Recurring	✓ Recurring	✓ Recurring	✓ Recurring	✓ Recurring
✓ Permission	✓ Permission	✓ Permission	✓ Permission	✓ Permission

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