



# Achieving Shared Vision for Mordecai's User Experience

## Foundational Design Process and Artifacts

SBD XD Brownbag, 9/19/07

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## A Note on Collaboration...

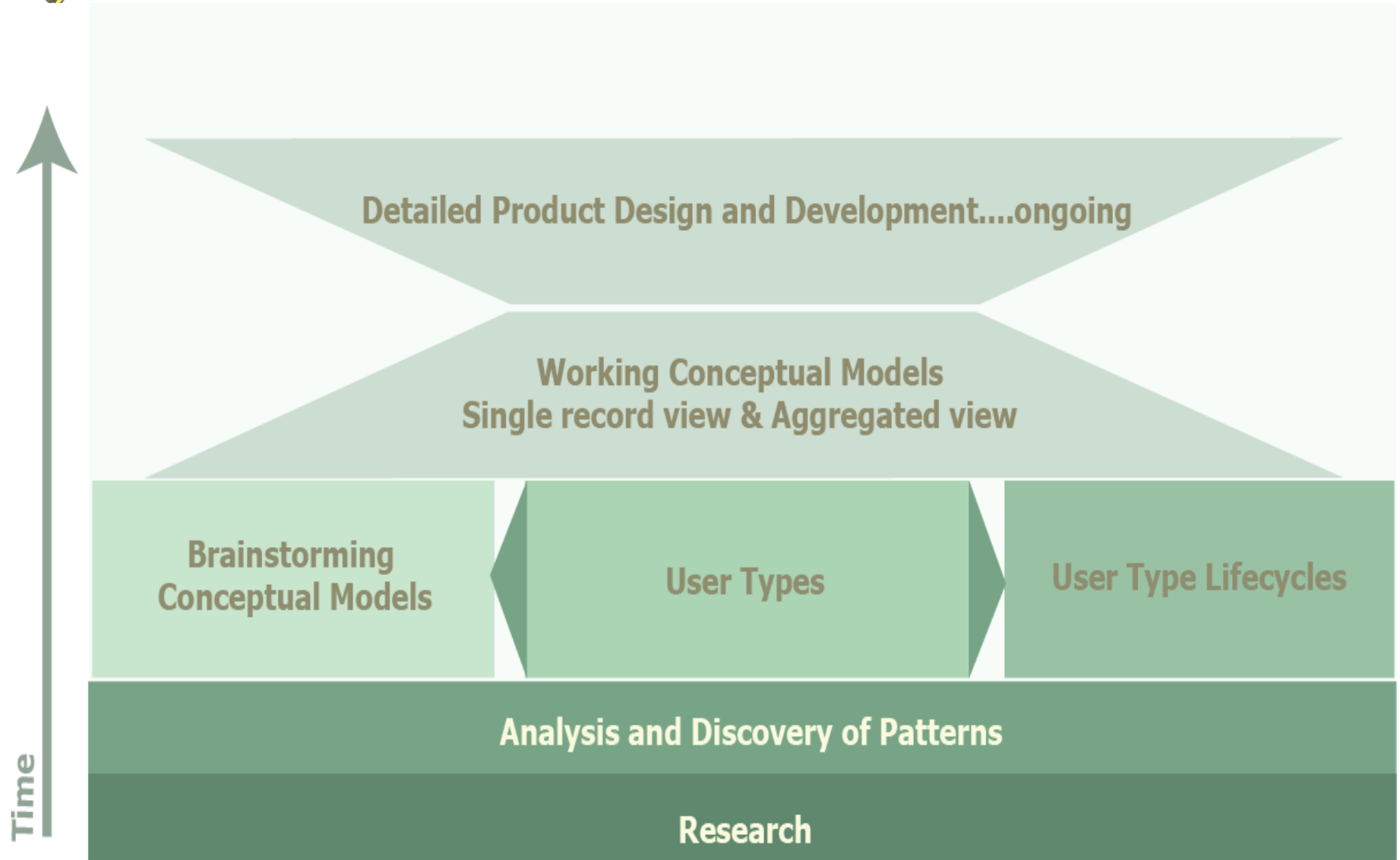
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- **Bring Them With You**
- **Cross-Functional Brainstorming**
- **Collaboration = Shared Vision**

Let's look at the collaborative design process we used to build the foundational design and achieve shared vision for Mordecai...



# Process Overview





# How we work

Mordecai : Customer Manager Line of Sight

## Framing

Why We Win	Mordecai Users Need to Be Able to....	Solution is Supported by...
1. Ability to collaborate between co-workers	<ul style="list-style-type: none"> <li>• Easily share all up to date customer information</li> <li>• Easy to coordinate schedule / tasks for a customer</li> <li>• Ability to assign / reassign tasks</li> </ul>	<ul style="list-style-type: none"> <li>• Shared calendar &amp; tasks</li> <li>• Track task status</li> </ul>
2. Clear & informative 360 view of customer information	<ul style="list-style-type: none"> <li>• Information is at user's fingertips</li> <li>• Information easy to scan / use</li> <li>• Seamlessly manage communications</li> </ul>	<ul style="list-style-type: none"> <li>• Activity history- who, what &amp; when</li> <li>• Integrated email (Outlook)</li> <li>•</li> </ul>
3. Ease of Adoption	<ul style="list-style-type: none"> <li>• Connecting to QuickBooks is 'almost' invisible</li> <li>• OnBoarding is drop dead easy</li> <li>• Seamlessly leverage existing information</li> </ul>	<ul style="list-style-type: none"> <li>• Input data from various sources</li> <li>• Integrated voice</li> <li>• Never enter data twice</li> </ul>
4. Seamless financial integration	<ul style="list-style-type: none"> <li>• Ability to create financial artifact in CM</li> <li>• Ability to get financial artifact into QuickBooks</li> <li>• Search &amp; browse for transaction history</li> </ul>	<ul style="list-style-type: none"> <li>• Initiate financial workflows</li> <li>• Ability to view transaction history</li> </ul>



MordecaiSBD XD



# Understanding Our Target Users

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Who?

- **...Begins with User Research**
  - Consistency Delivers Patterns
  - Our 10-minute Small Business Interview
  - Participatory Design Methodology
  - Accumulate a Storehouse of Findings



# Understanding our Users' MOTs and Pain

## What?

- Participatory Design and the Directions Methodology
- Using Excel to Reveal Patterns in the Research Findings

	G	H	I	
	<b>Workflow Process</b>	<b>View their work in terms of Jobs, Projects...</b>	<b>Needs for Building &amp; Maintaining Their Customer Relationships</b>	<b>Biggest Pain P Wishlist</b>
<p>1) Sales/Dispatcher gets a call from a customer</p> <p>2) Gets out a quote quickly (auto-generates Service Order #)</p> <p>3) Quote signed (typically receive fax or eFax)</p> <p>4) Schedule installation</p> <p>5) Depending on project, schedule to field technician</p> <p>6) Field technician completes work</p> <p>7) Test everything and provide documentation</p> <p>8) Bill for the job</p> <p>9) Payment received</p> <p>10) Pay the technician</p>	<p>■ "Service Orders" make up most of the work we do. These are estimated quotes that are adjusted after the job is completed and ready to bill. These are tracked by the Service Request # that is automatically generated when quote is</p>	<p>■ Need to forge strong relationships with <b>Building Managers</b>.</p> <p>■ Need to know the <b>Building Engineers</b> who can give them great insight on the logistics of the buildings where they install equipment.</p> <p>■ <b>Getting quotes out to customers quickly</b> is important: "when they call us they're panicking".</p> <p>■ <b>Quality of the service</b> we provide is everything: "We test everything and provide the test results documentation in a binder to the customers. They love that."</p>	<p>■ Wish his FileMaker <b>QuickBooks</b> -- that fill the date paid, or system.</p> <p>■ Would like to <b>keep</b> the warehouse installed job -- "use what we have"</p> <p>■ In the near future we need to communicate with Field Technicians w</p>	
	<b>Workflow P</b>		<b>Needs for Building &amp; Maintaining Their Customer Relationships</b>	<b>Biggest Pain P Wishlist</b>
			<p>■ We need to keep track of when the customer last-ordered, or dates when the</p>	<p>■ CM Sync -- "You fill the house and it's S</p>





# User Postcards and Affinity Exercise

## Who?



- One postcard for each user
- Represent consistent qualities
- Collaborative affinity exercise
- Rinse and Repeat (iterate!)

**John Christie**  
Role: Owner, sales, installer  
Use: CRM and QB  
User type: *Traditional: Field Service*  
**Advanced Audio Video**  
Segment: "Everyone does everything"  
"Simply do it all"  
3 CRM users of 3 employees  
Size: -15 active jobs per month  
Jobs:  
**Business description:**  
Advanced Audio Video is a dealer for Pioneer, Toshiba, and other electronics brands, and also provides installation of home video systems, etc. Their customers are both individuals and businesses. Have about 60-70 customers so far. (Business is 6 months old.)



## 1 Abigail



### Order Based : Know the Customer

Relatively simple sales process with a set number of critical details to track about the customer and about the order, whether product or service.

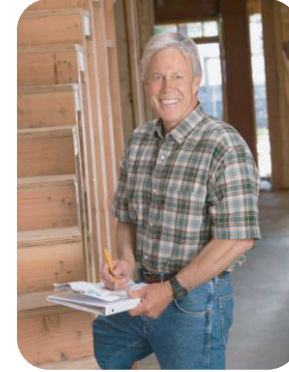
## 2 Thomas



### Time Based In Field : Great Service = Loyal Customers

There is set number of options available to fulfill the service and a need to hear from or contact central office or colleagues when in the field.

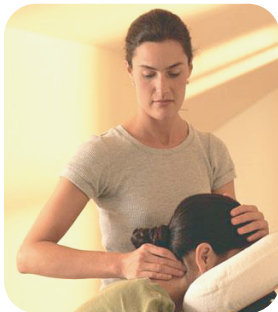
## 3 Casey



### Project Based : Planning Is Everything

The work typically requires many discrete and often complex tasks of varying length that potentially involve other employees.

## 4 Natalie



### Time Based In-Office Service : Keep the Rooms Booked

There is clearly defined number of options available to fulfill the service. The quality of the environment is critical.

## 5 Zach



### Membership Based : We Sell Relationships

Everything revolves around the interactions with the individual/s they serve. Attitude is everything.







# Personas

# Who.

## Personas Represent Each of Our User Types



### Abigail "Know the Customer"

#### Who I Am

Owner of bakery and catering business, I left the corporate world after having my son, and decided to pursue my dream of having my own business. Despite the long work hours, I enjoy running the bakery. Our customers love our custom-made cakes and our personal touch, that's what keeps them coming back.

#### I Use CRM to...

...collect a rich history of our customers' orders and preferences, and to stay on top of the delivery and catering events schedules.

#### Typical Day

The bakery is already hopping before the sun comes up. My partner, Joseph, manages the kitchen staff. I open the office at 8am. My main focus in the morning is to check for new orders that have come in since the previous day and make sure tickets go back for those. If there are any problems or changes to an order, I might need to follow up with the customers. Tim, Anthony and Veronica answer phones, do sales, take orders, and provide customer service. Robin is in charge of deliveries. She manages the delivery staff and oversees that the right orders get on the truck and out to the customer in time. We only have one truck now, so we've been using an outside messenger service to help us with deliveries on heavy days. If business keeps up, we'll need to add another truck. Sharon does the books.

We sell primarily to restaurants, caterers, coffee shops and other retail food stores. We have three big accounts that make up most of our work. It's really important to keep good relations and make sure customers are happy with us. One thing we've found when selling to restaurants is that it can be tough to get to the person who makes the buying decisions. Restaurant managers act as gatekeepers, and it can be hard to get past them. Landing the Copperstone Restaurants account was a boon for our business. Other smaller retailers heard about us and word got out about the quality of our goods. It's a small world in this business.

#### Personal Attributes

**Gender:** Female

**Age:** 45

**Marital Status:** Married

**Family:** 1 child

**Location:** San Diego, CA

**Job Role(s) in Business:** Owner, Chef

**Guilty Pleasure:** Dancing with the Stars

**User of:** Front office & Back office

**Uses of CRM:** Basic contact management  
Calendar and scheduling  
Initiate work orders  
Business overview

**Time Allotted to CRM:** Daily, ~2 hrs per day

**Existing Data Sources:** QuickBooks, Outlook

**Privacy of Financial Data:** Concerned

**Tech Knowledge:** Moderate

**Web Access:** Office: BB, Home: BB

#### Business Attributes

**Type of Business:** Bakery and Caterer

**Segment:** "Do & Delegate"

**Product or Service:** Product and Service

**Commodity:** Baked goods

**Stage in Business:** Young, 3.5 yrs

**Employees:** 8 full-time, 5+ part-time

**CRM Users:** 6

**Collaborators:** 6

**Work Environment:** Busy kitchen, Office, Home office

**Open WI\*:** 50 - 60

**Duration of WI\*:** <1hr - 2 weeks

**Frequency Per Customer:** 1x or repeating

**Customization of WI\*:** Medium

**Touchpoints Per WI\*:** Low

**Detail Tracked:** Medium

**Preparation Required:** Low

**Ease of Adoption:** Import from QuickBooks, 6 users

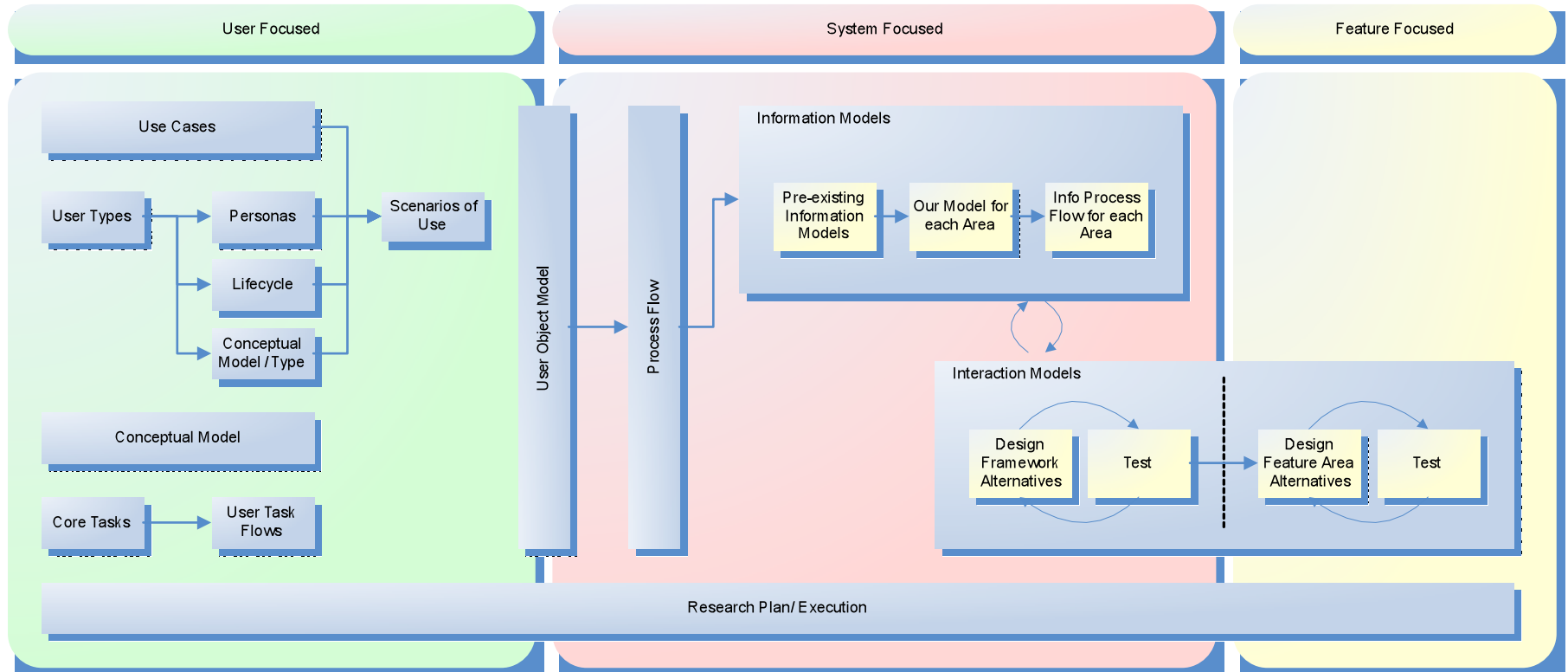
**Stage of Adoption:** Ready to track product sales

*"Our customer base has really grown. We needed help keeping track of customer preferences and to be able to see which products sell best."*



# ...Mordecai XD Process

## Getting to Great XD





## More Ways to Create Synergy...

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- **Shared Understanding of Design**
  - Communication, Being Transparent
  - Being Inclusive
  - Understanding Purpose and Use of Design Artifacts
  - Understanding the Stages of the Design Process
  - Developing a Shared Language
  - Collaborative Brainstorming and Sketching



# ...Glossary of Foundational XD Artifacts

- **Competitive Analysis**
  - Analysis of user experience attributes of competing CRM products.
  - Used to inform the UX design for UX conceptual model, objects, interaction behaviors, etc.
- **UX Conceptual Model**
  - Illustrates the small business owners' view of the artifacts/actions used to run their business. "Their world as they see it."
  - Used to inform the organization and UX design of the application / system.
  - (Is not a representation of the application / system.)
- **User Object Model**
  - Representation of the objects used in the context of the application/system that have attributes, actions and relationships with other objects associated with them.
  - Used to ensure that all objects (attributes, actions and relationships) used in the small business' model are represented in the application / system.
- **Personas**
  - Synthesis of the user types within our target audience. These drive the participants used in the scenarios of use.
  - Used to test the UX design against, to make sure the UX design is solving for the right needs and the right target.
- **Customer Lifecycle Model**
  - Representation of the lifecycle of an instance of a customer or job for a small business. Illustrates critical MOTs for the small business and by doing so, informs us of MOTs for the application / system. Also represents variation in this lifecycle across user types.
  - Used to illustrate user needs that inform the UX design, access points to critical information, etc. for the application / system.
- **Scenarios of Use – High level**
  - Incorporates personas, user objects, use cases, and tasks flows into situational "stories".
  - Used to drive research test scripts and UX prototypes.
- **Task Flows**
  - Taking the primary use case and decomposing them into tasks and modeling the ideal (= successful) series of steps the user would take to complete a task.
  - Used to inform the user experience design and for usability testing the UX design.
- **Interaction Models**
  - Based on all of the above. Screen-level design.
  - Used to drive interaction constructs to represent in the application/system.



## In Conclusion – What We Learned

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- **Collaborative brainstorming and sketching** facilitates our thinking and helps solidify our ideas
- **Be transparent and communicative** throughout the design process
- **Involve everyone** in the design process
- Don't wait to solicit buy-in periodically, instead **bring them with you**
- Collaborating on the foundational design **creates shared vision**

For more information on our user types, personas and conceptual models, see the [Mordecai Foundational Design deck](#).