Issue	Issue Type
Wanted to see 'top and bottom' pieces	Information Architecture
Unclear how they get from stage to stage - automated or manual	
Wants to associate current marketing processes to define the transitions from stage to stage	Information Architecture / Ease of Use
Wanted to stay in Analytics to get leads assigned / associate to each bucket.	Information Architecture
Wants to see the flow make sense over all. Drill into different ways folks are coming into the system.	Information Architecture / Ease of Use
Parallel Stages – Inquiry and Prospect	Information Architecture
Clicked Assign Leads	Information Architecture
Overview Page Order of Steps	Information Architecture
Smart List rules on transitions	Information Architecture
Noted single action under 'Stage Actions' as odd	Information Architecture
Getting existing leads into stages	Information Architecture

Smart List rules on transitions	Information Architecture
Doesn't find where to define the smart list for the transition rule	Information Architecture
Doesn't have concept of unknown because can't market to them	Information Architecture
Says he understands Gates as decision pts.	Information Architecture
Success Path	Information Architecture
Asked about value. Direct access to analytics	Information Architecture
Creating a group	Ease of Use / Information Architecture

Comment or Action

Don't have a formal recycling process / program. Would want to model it - wasn't initially clear she could.

Wanted to better understand the impact of nurture programs. It is hard to connect the dots to understand what 'pushed' them over the threshold - it would be helpful to know the adjacency of results from actions taken. wants to use current campaigns

Wanted to do it from within the modeler to defined the associated smart list.

Would like to see where/when/how - see the no. on the picture via the model. Once leads are associated with the model would like something to show up there to show what is going on in the system.

Wasn't sure how these could be reported in parallel. Definitely not a group

Expected a Trigger right there that says 'Create Trigger'

Said expected order (to be Marketo like) should be
>   1.   Build Model
>   2.   Put existing leads into stages via smart lists under the stage
>   3.   (Approve) to start new leads coming in

Wanted to put 'hit 65' on gate but because the transition is on the arrow deleted the gate and created two inventory stages = Score and Specific Actions.

Noted there wasn't really a Smart List behind the transition – but 'behind' the stage.

Was wondering what else would ultimately go there. Ie groups and track as account.

Smart lists for each stage – automagically be populated at the start when the model is built. Backwards to put in existing leads in after model is build.

Went to LD and create Add to Model flow

Wanted to do it right from the modeler

Wanted to put 'hit 65' on gate but because the transition is on the arrow deleted the gate and created two inventory stages = Score and Specific Actions.
Noted there wasn't really a Smart List behind the transition – but 'behind' the stage.

Really looked to find the UI affordance on the stage. Wanted to know where it moved to (how do they get 'here') versus where are they 'from' Repeated how Smart List rules don't make sense on transitions
Don't need to note it in the model

Yellow path – didn't get main path and detour path. Asked about Success Path – there isn't a success path. All of it is success if it gets to oppty. Wants known straight to Opty.
Would love it if I could map it out and have transition points and inventories be clickable and would open reports – ie. of this group of people who have been in stage 'xyz' how many are vps, how many are in business with size 'x' of have the transitions, clickable how many moved through this. Compare time periods. Do segmentation breakdowns – any one have sales in their titles?
Create detour prospects and articulated how they are really of a group. Prospects – 30 days, 90 days, …then created an arrow back to the path.

Issue	Issue Type
Insert a stage	Ease of Use
Wanted to Clone the people icon	Ease of Use
Delete Prospects	Ease of Use
Assumed she would have to add a transition	Ease of Use
Wanted to select two stages and hit a key board command to connect two stages	Ease of Use
Unclear how they get from stage to stage - automated or manual	Ease of Use
Struggles with how to move transition arrows	Ease of Use
Wants the ability to click and drag to select multiple stages	Ease of Use
Forgot to Clone	Ease of Use
Manipulating is easy	Ease of Use
Rules for moving from stage to stage	Ease of Use
Unclear how to make the arrows	Ease of Use
Building a Model	Ease of Use
Getting leads into the model	Ease of Use
Drag and Drop	Ease of Use

Comment or Action

Tooks a couple of tries to drag and drop over an arrow - confirmed expectation for the arrow to 'come apart' and insert the stage with all the arrows readjusted.

Wanted to do this to characterize the people who are not assigned but stay on the marketing list.

Expected the next one to reconect with with the previous one and the background (success path) reconnect.

Didn't know how to. To her, transition didn't look clickable. Tries to drag an arrow around. Had to be directed to notice the terminals

Wanted to better understand the impact of nurture programs. It is hard to connect the dots to understand what 'pushed' them over the threshold - it would be helpful to know the adjacency of results from actions taken.

Wants the dots on the arrows like google maps. Frequently deletes instead of moving out of frustration.

Forgot to Clone

Would use a trigger data value changes to prospect lead status

Has to be directed to roll over the selected stage to view the anchors.

Need to have best practices for creating a model – need just a little training. Would learn how to structure my model and not muck it up.

Is concerned about how people are loaded directly into the system and get into the different stages in different ways. Will they show up directly into a report for a given stage – not at the beginning. If so, model not dependent on a business process. (ie the transition rules)

Positive experience

Issue	Issue Type
Visual Design	
Confused with not being able to edit an Example	Visual
Didn't like that it lost the golden path when stages were removed from it.	Visual
Arrows connectors are cool	Visual
High light path (Success Path)	Visual
First View of Application	Visual
BUGs	
Cloned a model but the edit build model window didn't launch	Bug
Had to click on canvas (versus another stage) to save the previous changes	Bug
TERMINOLOGY	
Doesn't like term 'Inventory'	Terminology
Doesn't like term 'Gate'	Terminology
Understands SLA	Terminology
Use of the word 'type' in properties	Terminology
Used the word Milestone in referring to a stage	Terminology
Unclear of what 'stages' meant.	Terminology
Used the word Milestone in referring to a stage	Terminology

Comment or Action
Unsure what this meant
Page seems very consistent with brand and general feel of the application.
Felt the window should launch after naming and giving it a description
Had to click on canvas (versus another stage) to save the previous changes
In Marketo entities are leads or people. Not everyone uses the term 'lead' sometimes confuses customers
Referred to the visio shape noting decision point
Would only give to stages that had service level agreements – SDRs and Sales
Not sure what 'Type' is. Used a lot in Marketo already. Type field on lead or account? Not sure what that represents.
seems like stages represent lead status. A little confusing, perception is this bucked = prospect.