Honey CRM

A better way to communicate between the CRM and the user

Case Study - Extended Version





Project Overview

The product

Honey CRM is a software that helps IT companies connect with marketing agencies or create, automate and track their own marketing material in order to generate high-quality campaigns from beginning to end.

Project Duration

Four weeks.







Project Overview

The problem

The Honey CRM platform needs to constantly have clear communication with its users so they can better understand and use all the features that the CRM has to offer.

The goal

To improve communication with the user, it was necessary to map the entire flow and detect where to provide the user with feedback or where to send certain emails.





Project Overview

Our Role

We looked over all the features and the behavior of Honey CRM with the objective of applying the best practices of information architecture. Through this, we were able to analyze where it was necessary to integrate a communication point and what type would be the most appropriate for an optimized experience.

Responsabilities

- User research
- Information architecture
- Service blueprint
- Final recommendations





Understanding the User

- User Research
- Personas
- Problem Statements
- User Journey Maps





User Research

Summary

The research stage began with a deep analysis of the CRM functionalities and a benchmark of existing products with similar characteristics. Together with the stakeholders we were able to gather more information and establish that there are at least two main roles that interact with the platform as a user:

- Sales person
- Marketing person

To determine in which areas communication with these roles could be improved, we created user journeys, site maps and a service design blueprint that would lead us to a better understanding of the touch points.





Pain Points

General organization

Identifying and capturing the specifications of each lead can be difficult when a small or medium-sized company begins to grow and have a more extensive list.

Visibility

Slow manual processes often stem from a lack of visibility of what each member of the work team is doing.

Reminders

Remembering to keep track of each lead if a strict calendar has not been implemented from the beginning.

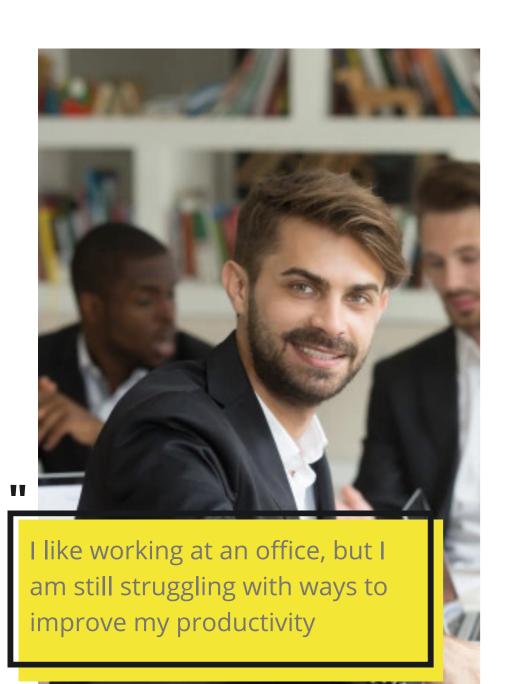
Optimize time

When processes are not automated, daily tasks can take an unnecessary amount of time, from sales tracking to marketing plans and data entry.





Persona



Stefan

- **•** 32
- Austin, Texas
- Sales

Bio

Stefan has held remote positions as a web developer for many years. Recently, he has decided to enter a sales position that will allow him to go back to the office in person. Stefan now holds a sales position in an IT company, his background as a developer has helped him a lot in this new sales position.

Goals & Motivations

- Learning new things but without burning out.
- Optimize his work with technological tools.
- Stay up-to-date and carry out his activities in an innovative and practical way.

Frustrations

- He does not like not knowing what to do next.
- He wants to better understand how to work with different stakeholders.
- He is not able to serve as many clients as in the virtual world.
- He misses creating products.





User Journey Map

Opportunities Email reminder Phases of the Dashboard Call Login **Contacts** Journey · He reviews his meetings for the day · Adds a call in an specific lead profile · Receives a weekly and monthly email · Enter the Honey CRM page · Analyze leads in progress Sees the companies list Sees the lead details Doing · Compares his current status with the · schedule a meeting in person with Selects a lead about the updates · Contacts the lead to send him a Login with email desired monthly quota one of the leads · Sees the profile video call link Makes the video call information of one lead Thinking · How can my IT skills help me? · How can I improve my • I prefer to choose the contact I have many registered I like having everything organized · It is very useful to receive the · I would like to save highlights of my · Will I be able to follow up on all quota? method that best suits me leads and it is difficult to · I wish the scheduling process was information summaries Thinking Will I have enough time to remember many tasks on · These reminders are not optimal for • This is the part of the process that I the leads? do my earrings today? appointments and calls enjoy the most Feeling Pain Points · Each CRM is very different and he is · The meetings does not have a daily Not remembering Lack of reminders · It is not redirected to a call or video · He forgets the scheduled · Sometimes he forgets the tasks he going to have to learn the basics **Pain Points** · There are still some features that specifications of each lead call link appointments, calls and emails has scheduled reminder · Constantly review a to-do he does not fully understand · upcoming to-do list · You usually schedule more than one call at a time in a timely manner

Opportunities

Opportunities

- · Welcome the user
- Quick start guide

Opportunities

· View to compare periods

Opportunities

· Add appointments, calls and emails to the internal

Opportunities

· Make getting started guides shorter · Schedule and send reminders of specific activities related to a single

Opportunities

- · Add the tasks to the calendar · Link the task with the external
- calendar (google, microsoft, etc ...)

Opportunities

· Add reminders an hour and a half hour before the task

Opportunities

· To have visibility of the tasks that are had by periods of time

Report

- Opens a campaign report
- · Downloads the report
- Shares the report via email

· It is easy to share this information



· He wants reports of specific dates and cannot edit them

Opportunities

- · Configure some specifications of what is shown in reports
- Configure which reports to receive and





Persona



It is always a better option if I can find a work tool that allows me to speed up the processes

Olivia

- **•** 37
- San Francisco
- Marketing

Bio

With a background as a strategic designer, Olivia has been increasingly involved in the IT industries and her role has adapted to the needs of her team. Olivia currently works for a small startup and while the company gets more customers, her designer activities transformed into creating marketing campaigns.

Goals & Motivations

- Accelerate and automate marketing processes to be able to spend more time on strategic design.
- Have a content catalog so she can easily select the graphic designs.
- Support the marketing process but not doing everything by herself.

Frustrations

- She wants to go back to strategic design and not spend so much time on graphic design.
- She feels that she lacks knowledge to create optimal campaigns.
- Her work routine feels repetitive.





User Journey Map

Dashboard Phases of the **Create content** <u>Automation</u> List details Login **Contact** Journey · Check the monthly lead quota · Goes to marketing collateral Goes to contact list Create an specific email • Enter the Honey CRM page Goes to automated Doing Login with email · analyze opportunities and wins · Uploads a graphic content · Detects a potential lead Attach marketing content Reuse an automated Send email Thinking Thinking · Will I require training to use the How will I be able to reach I'm happy to be able to The steps are easy to make . I would like to reuse items that I · How can I send more personalized the desired objectives? have used previously optimize the process content but without taking too long? . She is familiarize with the flow Thinking Will the learning curve be too • Will my performance be • I like to design but it takes a long hetter than last week? long? **Feeling** • It is only possible to enter with email

Pain Points

Opportunities

Opportunities

- · Quick login methods Remember the user
- · Welcome the user

Opportunities

· Present information in a comparable format

· Information saturation

· Constantly clicks on non-clickable

· Redirect user to specific tasks based on the metrics showed

Opportunities

· Reduce the steps to create and send a campaign

Many content sections

· It is not possible to send

the content from this

available

Opportunities

· Have short tutorials or instructions

· Lack of feedback when making

automation steps

Opportunities

· Track the follow-up of each lead

· Automate more personalized or

· Forget some specifications for each

specific processes

Opportunities

· Automate the process more detailed

· she does not see how to scale

this part of the marketing

process

· Configure some specifications of what is shown in reports

· A short versión with less technical

details would help her to share her

Reports

Opens a campaign report

Shares the report via email

· It is easy to share this information

understand the marketing progres

· my peers and boss will better

· Downloads the report





Inspecting the UX

- Site map
- User flow
- Service blueprint
- Digital Wireframes
- Findings
- Accessibility Considerations



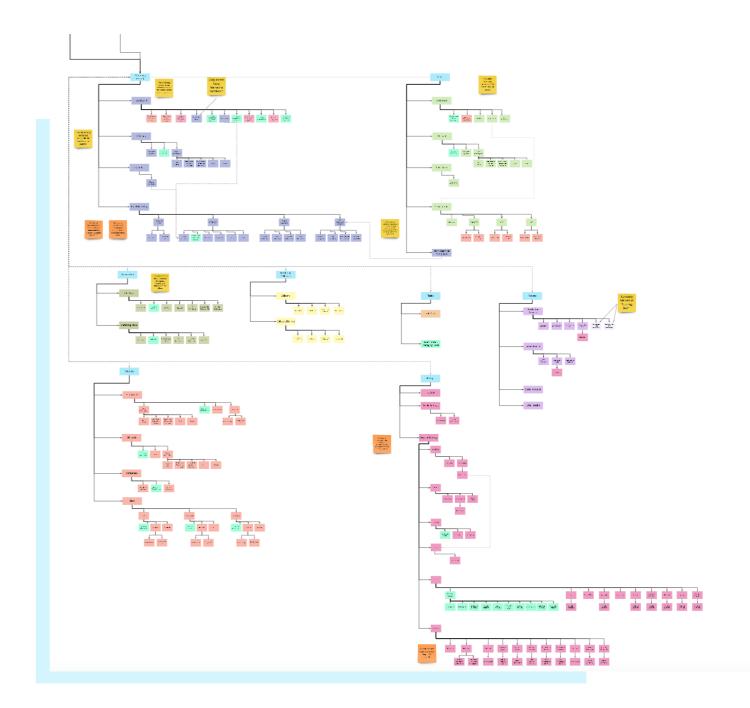


Site Map

Process

To have a complete understanding of the product, we first mapped the existing content of the platform and then created an ideal site map to define where we wanted to take the information architecture.

The site map was the first step to clarify the project's goals and ensure that every element of the product is going to reinforce them.

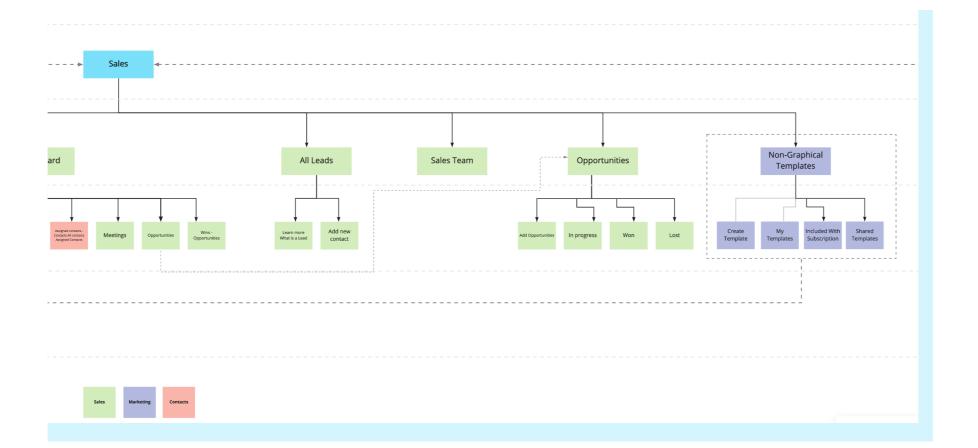






Site Map

Some sections are not available for all the users



The sales people access some marketing sections, but only from the sales menu

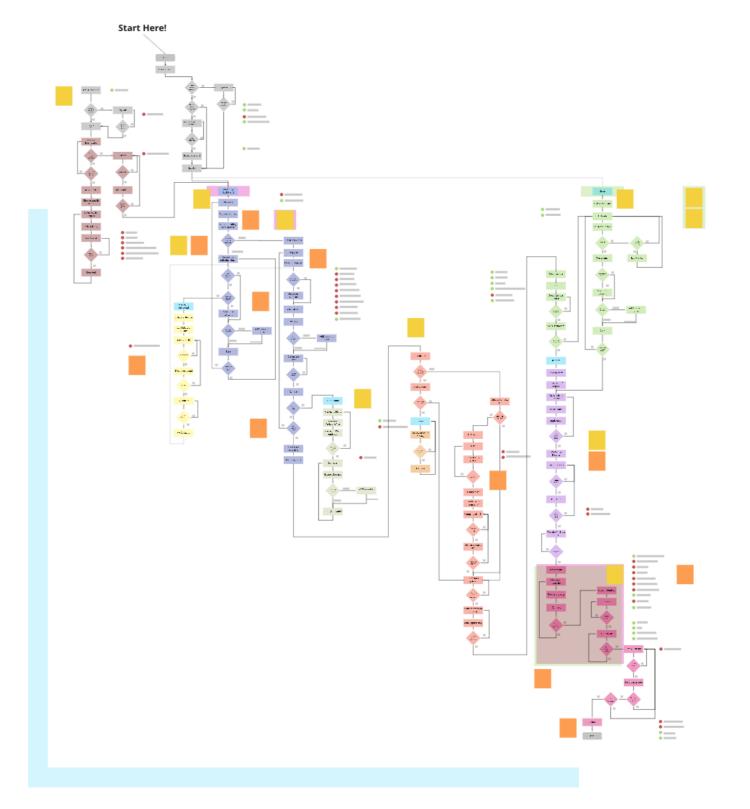




User Flow

Process

This user flow represents a path with the most important actions within the platform and makes the user's interaction with it more evident. This tool helps to have a better understanding of how the platform should respond to the user's actions.

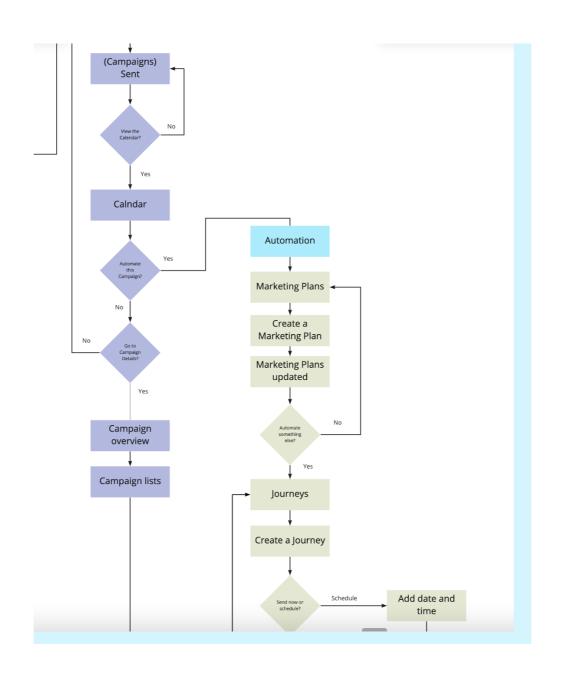






User Flow

Scalable automation processes



Marketing Plans are reflected in the calendar



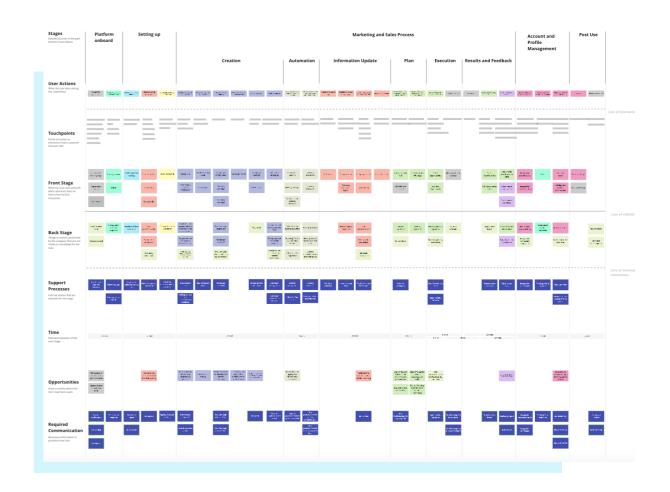


Service blueprint

Process

After validating the flow with the stakeholders and verifying that they agreed with the final version of the information architecture, we created a service design blueprint.

This tool is a planning resource that shows the relationships between the different service components. A blueprint attempts to optimize how an experience is delivered and has a specific business goal. In the case of the Honey CRM, the goal is to improve the communication between the platform and the user and find other improvement areas in the platform.

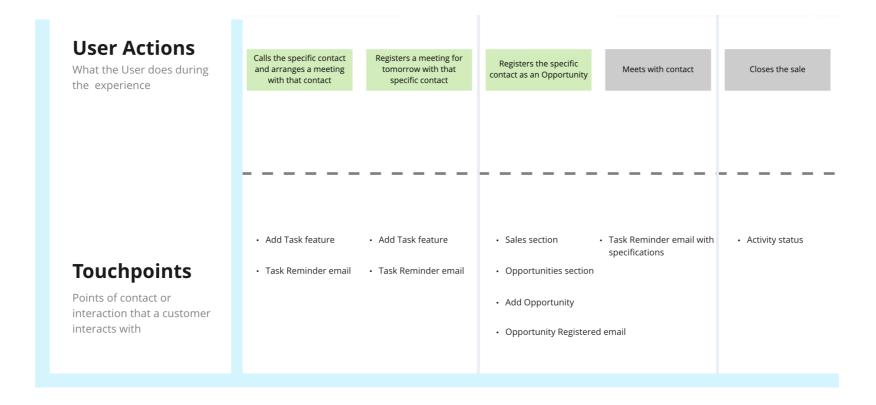






Service blueprint

Task specifications must be emailed to the user before the event occurs.



When an opportunity is registered in the CRM, the user needs to be notified.

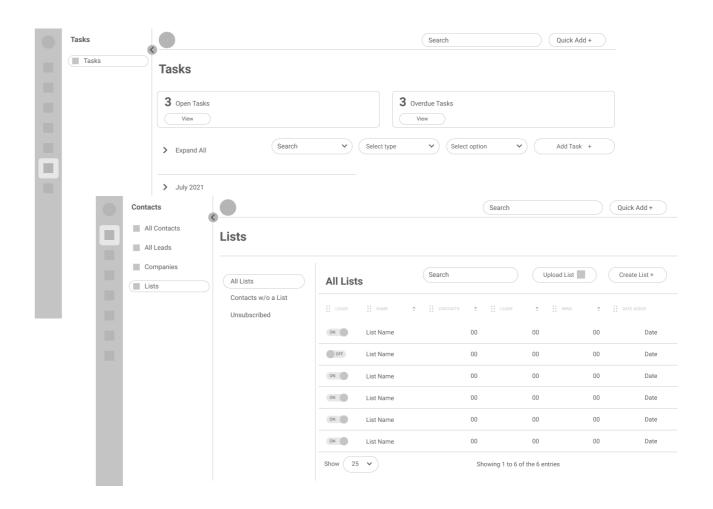




Digital Wireframes

Process

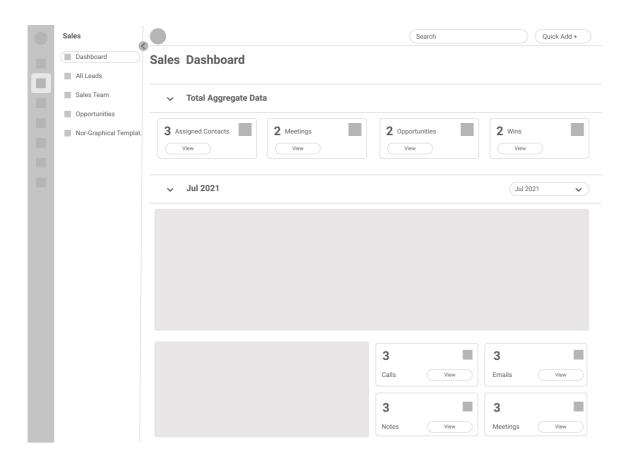
In this process, digital wireframes were very useful to explain the improvement areas that were detected in the existing platform. We created some wireframes to represent a series of ideas that could be viewed on a single screen.





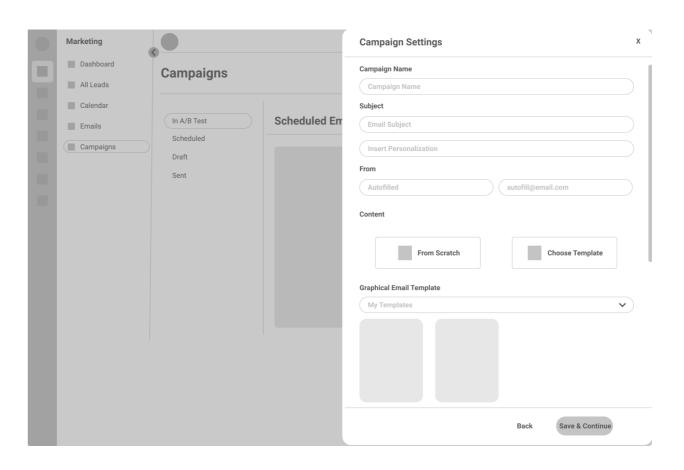


Digital Wireframes



Standardize buttons

Maintain consistency in actions and elements and add labels next to the icons to improve accessibility.



Avoid double modals

Before, one of the modals was on top of the other while adding content to the campaign, but when organizing the content that is attached this no longer happens.





Findings

Most relevant emails and notifications detected in the flow:

- Welcome email
- Password change request
- New marketing resources available
- Campaign schedule
- Campaign activated
- Campaign results
- Automated process activated
- New lead assigned
- Quotas changed
- (Call / Meeting / Email) Specifications
- Task scheduled
- Task reminder





Accessibility Considerations

Accessibility in current features

- Insert in each main section a proper heading with a brief description
- Set up a new content organization, so all the actions are less than five clicks away
- Have a hover state for clickable elements
- Add clear labels to the icons, especially those used as navigation elements
- Give feedback to the user after performing an action
- Maintain consistency between elements of equal behavior





Going Forward

- Takeaways
- Next Steps





Takeaways

Impact

A CRM is a very sophisticated tool, but with the correct information provided at the right moments, the learning curve is shortened.

By creating good communication between the platform and the person, the interaction is more likely to be pleasant, and the user will be able to correctly use and value all the product's features.

Learnings

- Providing feedback maintains better customer relationships.
- With a correct interaction, it's easier to know what the users appreciate more about the platform.
- Clear paths for website visitors make a site easier to navigate.
- Users enjoy the platforms that they can understand.





Next Steps

What's next?

- Take the recommendations to visual representations
- Create interactive prototypes
- Test the platform with real users
- Develop the improvements





Thanks for tuning in!



