

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.

Responsibilities

- 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



I like working at an office, but I am still struggling with ways to improve my productivity

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



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.

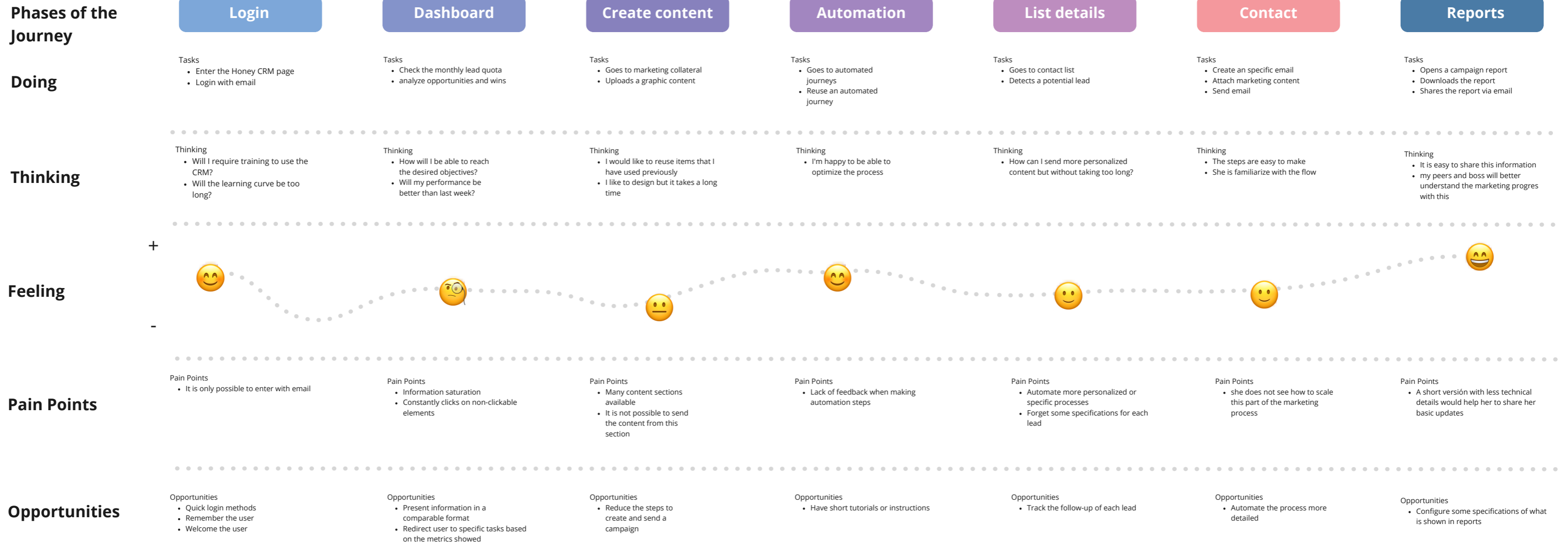
Goals & Motivations

- 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



Inspecting the UX

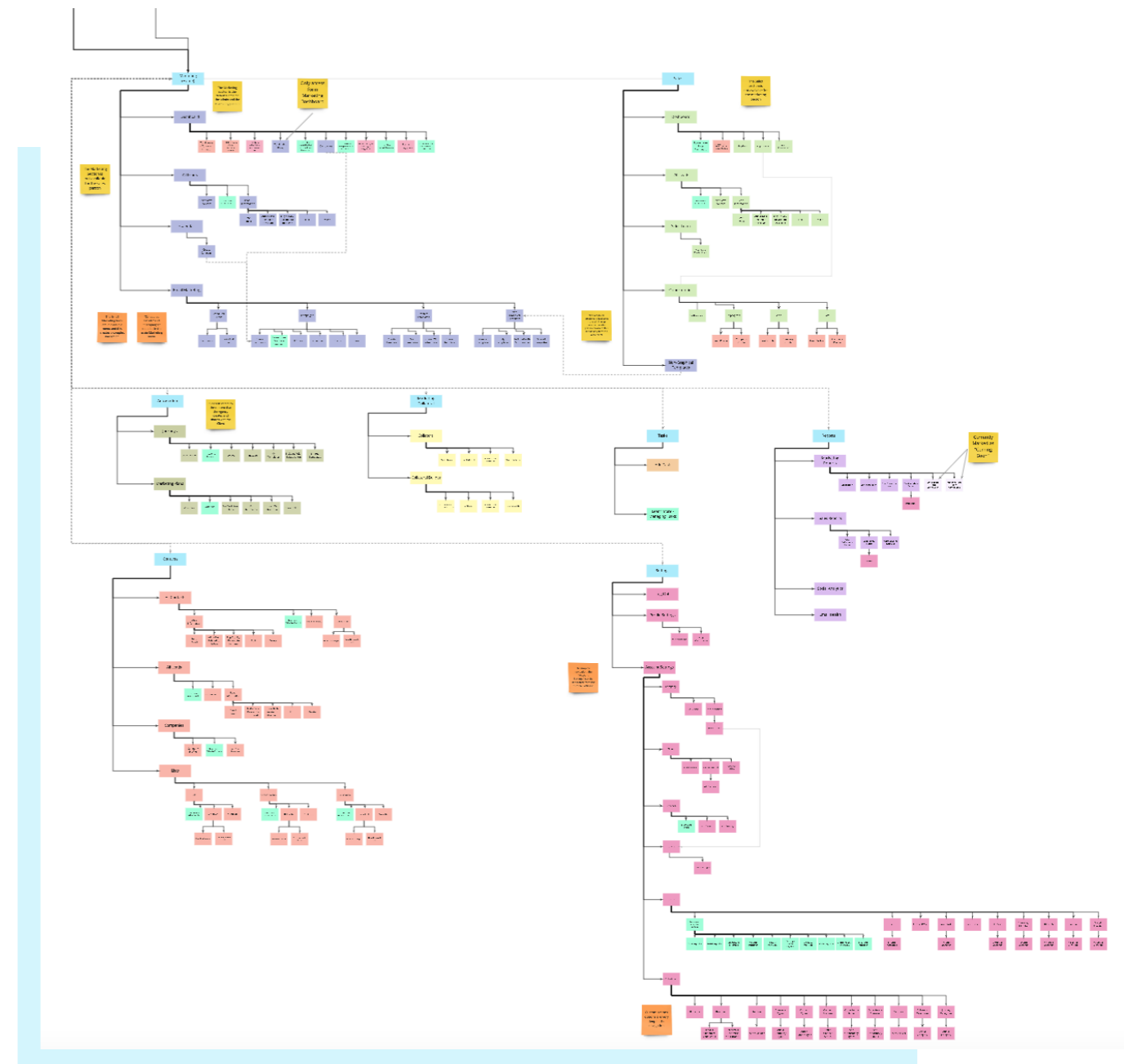
- Site map
- User flow
- Service blueprint
- Digital Wireframes
- Findings
- Accessibility Considerations

Site Map

Process

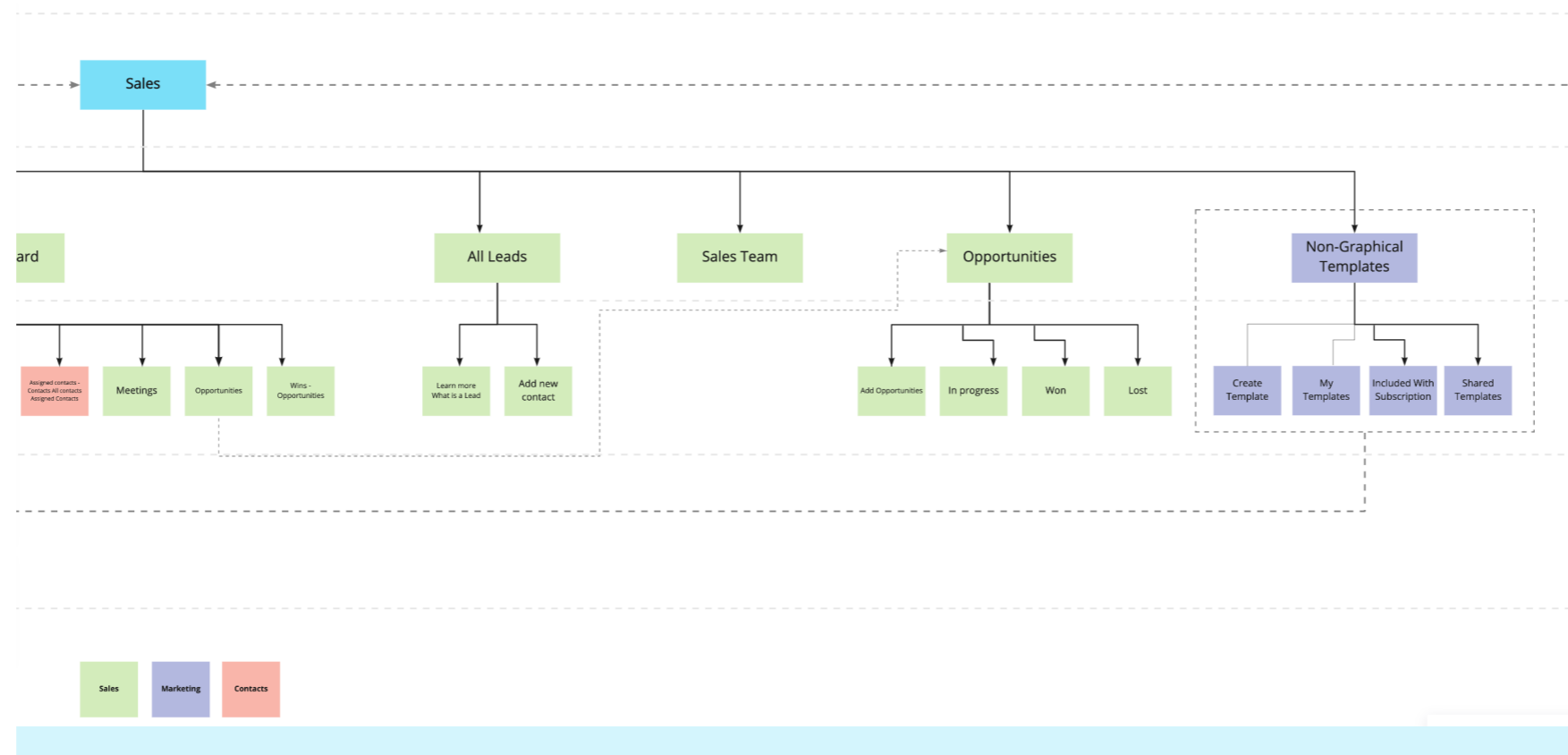
To have a complete understanding of the product, we first mapped the existing content of the platform and then created an ideal site map to define where we wanted to take the information architecture.

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

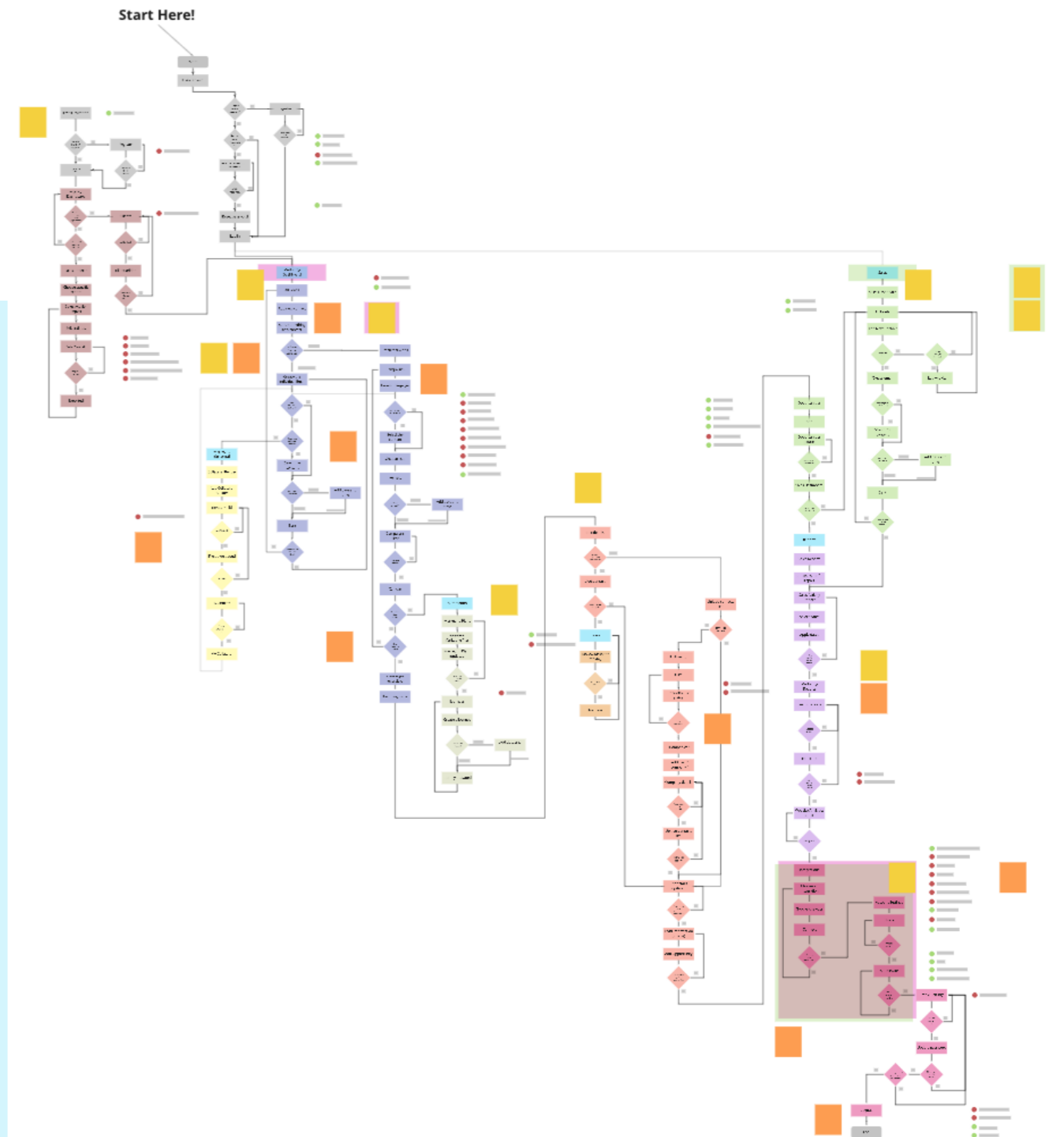


The sales people access some marketing sections, but only from the sales menu

User Flow

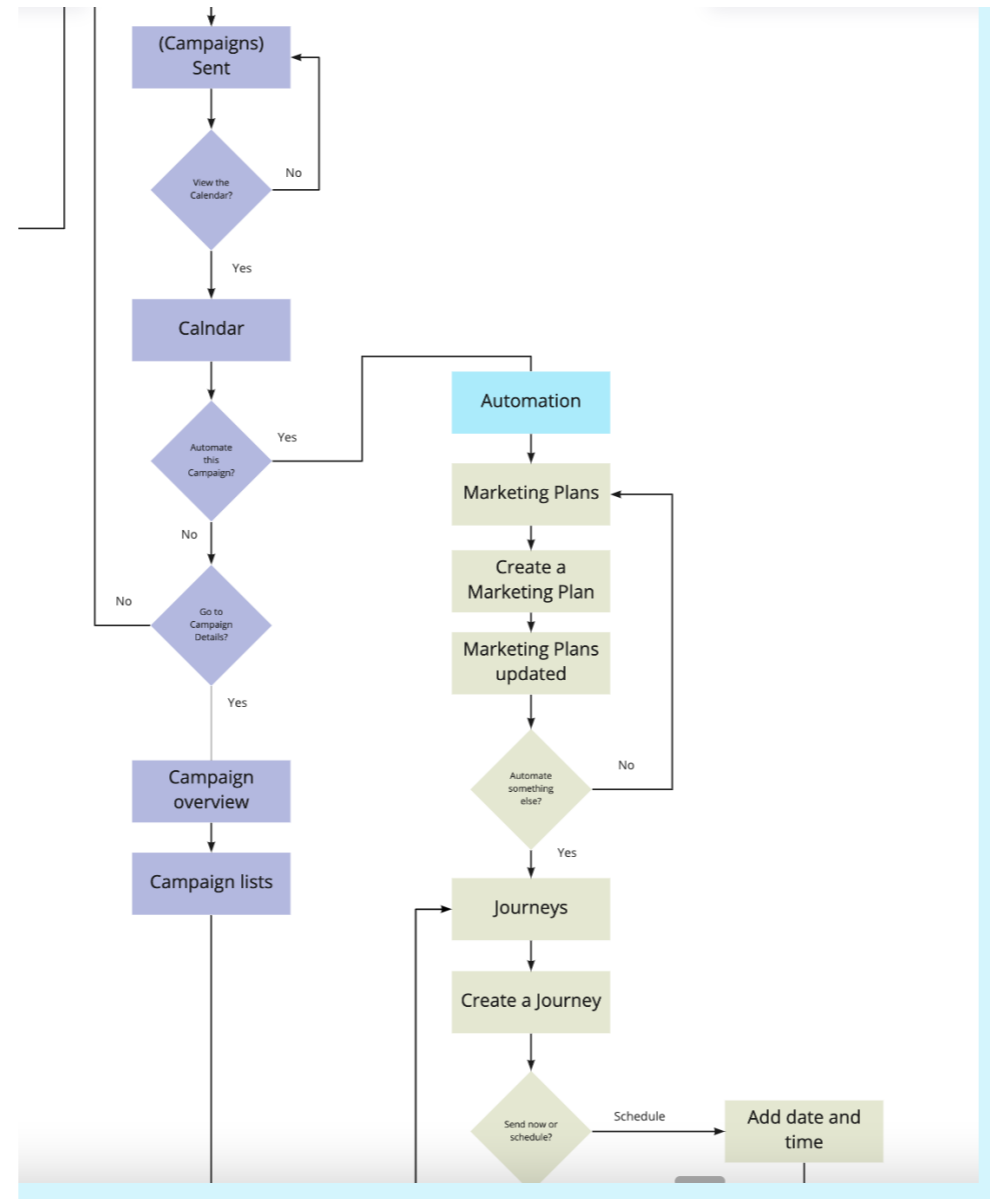
Process

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



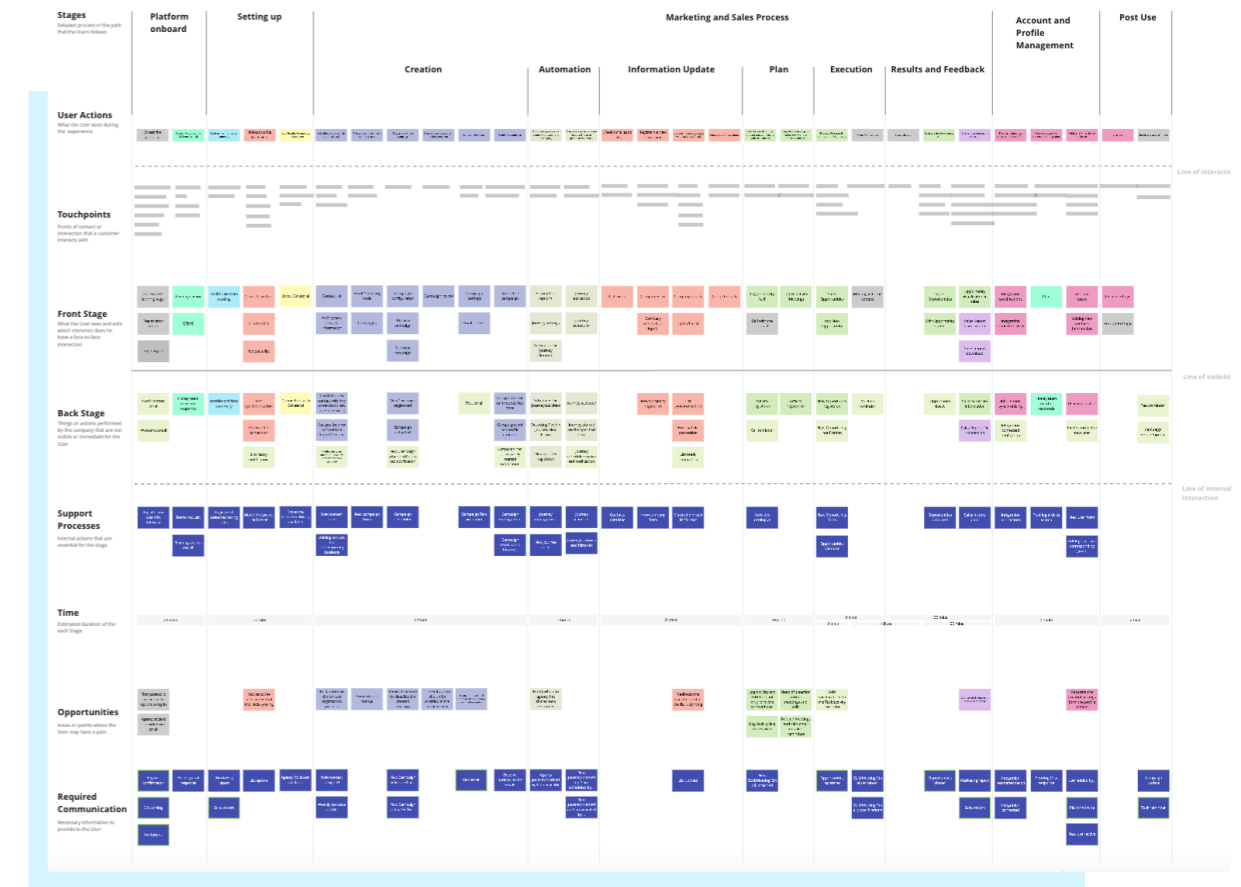
Marketing Plans are reflected in the calendar

Service blueprint

Process

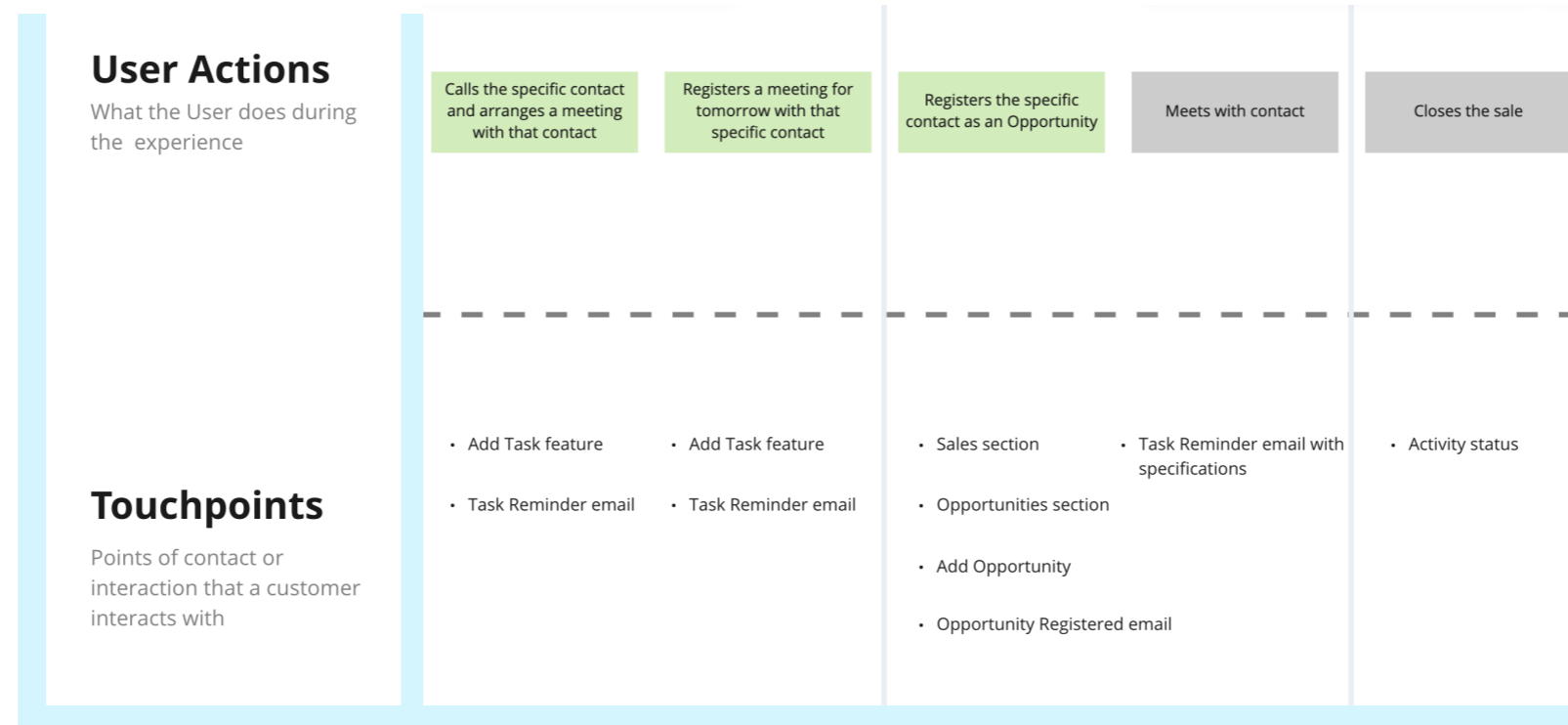
After validating the flow with the stakeholders and verifying that they agreed with the final version of the information architecture, we created a service design blueprint.

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.

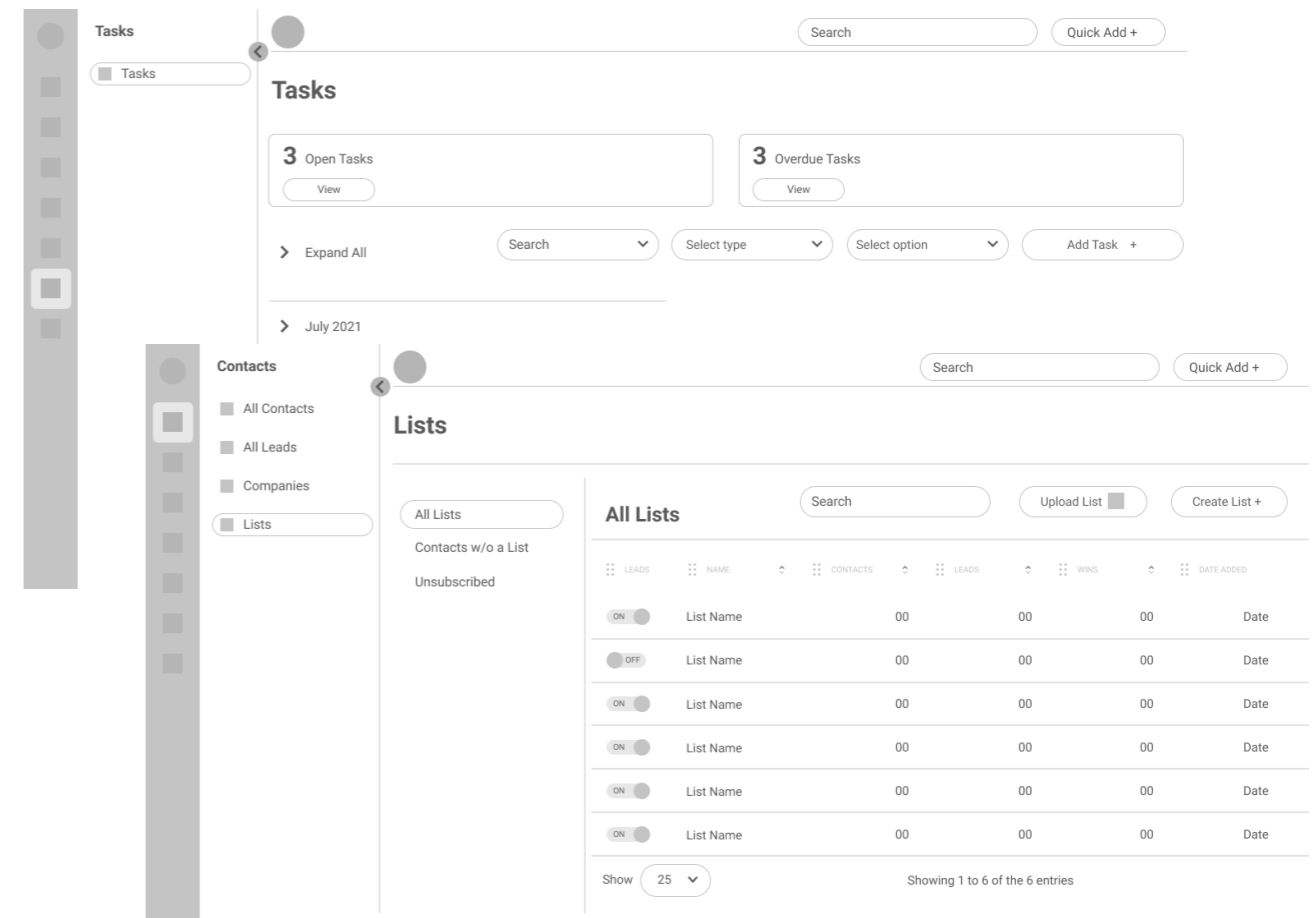


When an opportunity is registered in the CRM, the user needs to be notified.

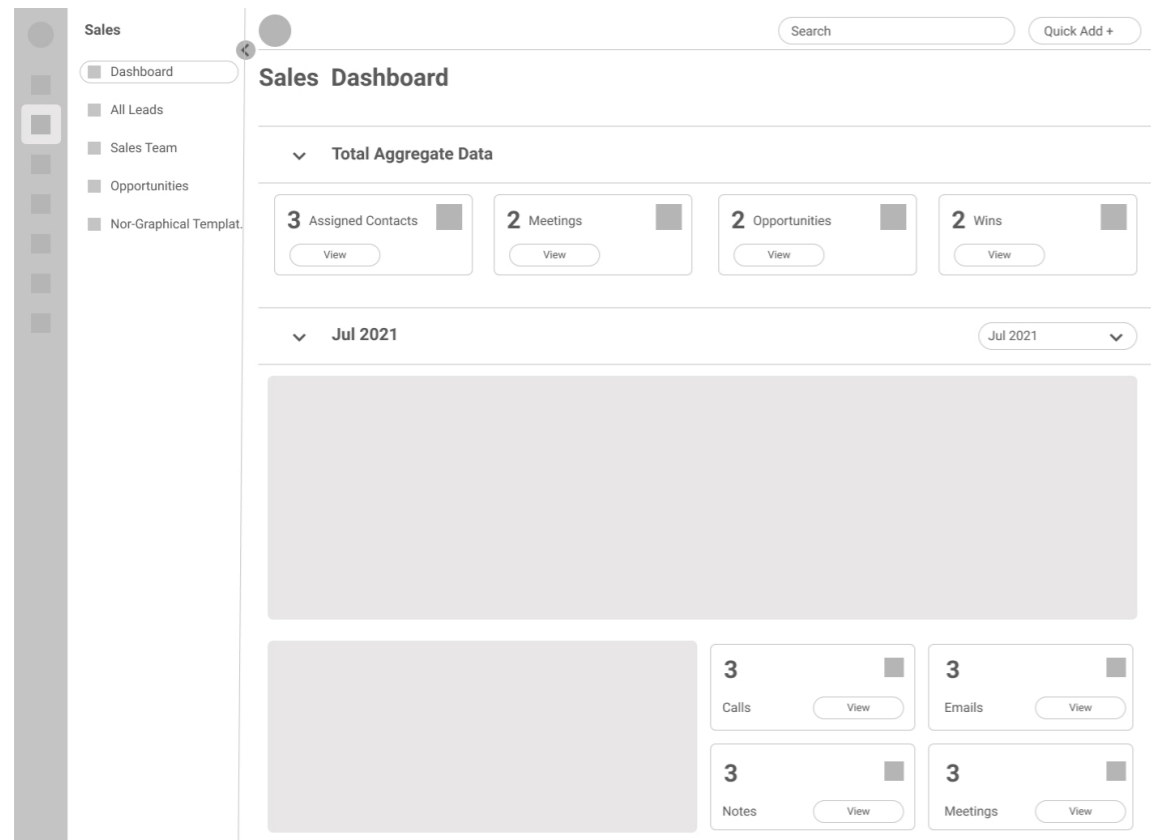
Digital Wireframes

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.

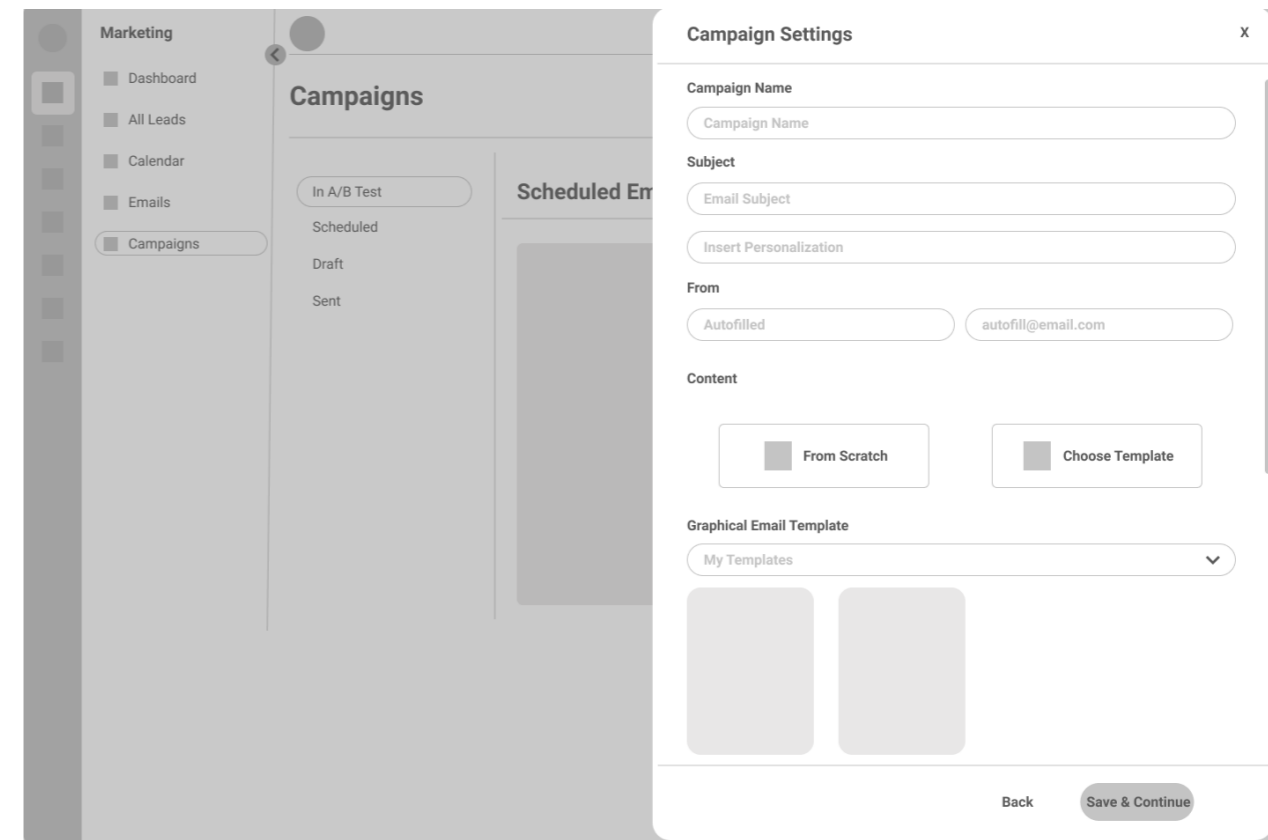


Digital Wireframes



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!**

