tigerspike

User Research Key Findings

ADP:
Sales Performance Management Tool

This document outlines the key findings emerging from the user session

1. **Daily Core Usage of Oracle:** District Managers have expressed that they would like a field application that allows for quick on the go access to their sales data, including the following items and functionality:
   - **Total Sales**
   - **Progress towards their quota**
   - Projected monthly sales
   - Access to up to the minute updates in Oracle on what they have sold
   - What has been **sold, billed and entered into Oracle** and what has been sold but not yet entered into Oracle
   - Access to any sales that they thought were billed but were **flagged or have a hold** on them
   - Rollcall summarized and **net totals by client** (including client name)
   - See a breakout of the client and deal to make sure it was attributed to the correct DM/Sales Office
   - Don't need forecasts or most of the Oracle detail screens

2. **Available Technology:** Understanding how ADP employees use technology while on the job.
   - All members of the sales team have company issued iPads with AT&T 4G access
   - Most users currently have iPhones some have BlackBerrys.
   - Android is currently not supported by ADP
   - iPads are used daily for sales presentations, corporate email and sales paperwork
   - Notifications are mostly accessed on iPhones as they are always on hand

3. **Usage Of Oracle:** Queries on ADP employees usage of Oracle and what information is most important yielded the below descriptions:
   - ADP employees are checking Oracle daily
   - They are checking to see **MTD sales** that have been logged into Oracle to see where they stand. They are looking frequently, **3-4 times a day**, to ensure that a deal they sold is entered at the amount they expected it to be.
   - They are first looking for **MTD billable** – the amount sold that has been billed in Oracle.
     - Details and totals of the deal
     - **Net Rollcall amount by client**
     - Rollcall by week, by DM and by salesperson
     - Forecasted **audits to their account** and anticipated amount of the audit
     - % To quota they have sold
     - **Compensation** aspects of their deals closed including partner splits
   - The most important information they need to access:
     - All sales executives sales and district managers rollup. (VP's will drill down for more info)

Tigerspike New York
133 W 19th Street, 7th Floor, New York NY 10011
+1 646 330 4636 | newyork@tigerspike.com | www.tigerspike.com
TigerSpike Inc.

- Information at a company level:
    - Company name
    - Product name
    - Plan number (6 digit number that identifies plan)
    - Net value of the sale

4. **Usage Of Rollcall:** Specific questions on the information ADP employees seek in using Rollcall showed the following results.
    - Users indicated a strong desire to see total Rollcall by Week, DM & office.
    - They would like to see exactly what has **been sold & billed and what hasn't been billed**, and if it was entered for the correct amount and was **attributed to the correct office and DM**.
    - They would like to know of any **pending audits** and expected amount.
    - DM's would like to see **compensation** as well.
    - Sales executives would like to see roll ups and their partner sales.
    - **Sales compensation**: Commissions, contest results, amount of next check etc.

5. **Expectations:** Prior to showcasing the application ADP users were asked to describe what they would expect to see in the prototype.
    - Users expect to see sales data in the following priority order:
        1. **MTD**
        2. **WTD**
        3. **YTD**
    - Users would like to able to select an item to drill down for more information and details on the deal.
    - Users would like to see total net sales by client.

    Notifications:
    - Users would like to have push notifications for:
        - Beginning and end of month reminders
        - Upcoming no-starts & negative audits (sales liabilities)
        - When a deal hits the Oracle system

6. **Demonstration:** Users offered the following feedback on the specific screens.
    - Log in screen:
        - Possible better branding for the app name along with a tagline
        - Current design doesn't feel like an ADP branded app
    - Rollcall landing page:
        - Users would like to see their **"Presidents Club"** quota status
        - The column titled "Left To Get" is misleading and should be "Variance to Plan" or "Left To Get To Plan"
        - Users would like all numbers default to be sorted by **MTD, YTD then WTD**, with a possible split view for MTD & WTD
    - Rollcall Manager Page:
        - Users would like to see it default to MTD
        - Doesn't need to include roles
        - Sort teams by Quota in descending order
    - Rollcall DM Page:
        - No feedback
    - Rollcall Transactions Page:
        - **Include a visual or icon to indicate if a sale has a % split associated with it or not**
        - Users would like to see a total by client, not just the items sold to that client

innovation lab
Future-proof your Business
phoenix
Multi-platform Technology
Tigerspike New York
133 W 19th Street, 7th Floor, New York NY 10011
+1 646 330 4636 | newyork@tigerspike.com | www.tigerspike.com
TigerSpike Inc.

    - DM's will need to know which transactions have splits and what the % split is so they can check it was entered properly and attributed to the right office
    - Some users indicated they would like to see Rollcall transactions as well as their details on the same page and not have to drill to a second page to see details.
    - Users would like a "search" by client on YTD & MTD screens
    - Visual representation or icon to indicate if a audit is in place, in danger of a No-Start or any holds on a sale.
- Rollcall Detail Page:
    - The users would like to see the % split assigned to the deal as opposed to showing that they got 100% of their share of the split
- YTD Summary:
    - Add an icon to indicate a new "Note" has been added

7. **Additional Functionality:** During our review an additional functionality feature was suggested.
    - Sales Ranking Report – Currently, sending a Sales Ranking Report or Leaderboard is a manual and repetitive process. The purpose of these reports is to drive performance and foster competition. There is an option to automate the creation of these reports and distribute them utilizing the SPM app.

Tigerspike New York
133 W 19th Street, 7th Floor, New York NY 10011
+1 646 330 4636 | newyork@tigerspike.com | www.tigerspike.com
TigerSpike Inc.