User Research Key Findings
Sales Beacon App for iPad

This document outlines the key findings emerging from user testing that took place 4-5 November. 10 users were interviewed. Participants included 5 Sales Executives and 5 District Managers.

Limitations of the user research
Based on the time available for interviews not all users answered every question, this is reflected in the findings below. Furthermore, when evaluating the prototype for Sales Beacon on iPad, users were only able to view non-interactive visuals of the Dashboard and Rollcall screens.

Usage of Technology

1. **Device usage:** 8/10 users across District Managers and Sales Executives work on their iPad in the field. 10/10 users use a laptop in the office and some in the field. All users used smartphones.

2. **IPad Orientation:** 7/8 users preferred using the iPad in landscape mode. Users pointed out that most ADP apps are only available in portrait. Users mentioned that ADP-issued keyboard and stand were not user friendly.

3. **Reasons for usage:** All users access work e-mail on their smartphones. 5/8 used other ADP apps on their iPad.

Current Usage of Oracle

4. **Usage of Oracle:** 3/8 users access Oracle 1x/week. 2/8 access 3x/week. 3/8 check Oracle daily or multiple times/day. 3/4 users reported checking Oracle more frequently at the end of the month. 4/4 users reported checking Oracle more frequently at the end of the month and at the end of the week. Although Oracle is used as a central accounting system for ADP, some users reported that outside of Oracle they do not have a system for keeping track and have the information only in their minds.

5. **Reason for checking Oracle:** Most users check Oracle to validate that ADP's accounting is correct and properly reflects the deals they have worked on. They sometimes find mistakes. Secondarily, they use it to check other numbers that they may not be keeping track of locally, including sales liability, no starts, aggregate numbers like month to date, year to date figures, and the rest of the information found in the system.

6. **Drilldown:** SE's drill down to a detail of a deal, a particular salesperson's history, what types of deals were sold (e.g. 401K, Simple IRA), how many partner splits and no starts. DM's were mainly concerned with top level figures unless they are behind on quota, in which case they may drill down to see which areas they may be able to exploit for other sales opportunities.

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Current Usage of Rollcall

7. **Frequency of Usage:** 4/8 Users check Rollcall daily. 4/8 check weekly. Checking Rollcall appeared more common for SE's. Note. DM's would check Rollcall more often if it were easier whilst in the field.

8. **Reasons for Usage:** Users check to confirm that the numbers ADP is entering are accurate. Users also mentioned checking transaction splits.

9. **Most important numbers:** There was a range of numbers that users found important in Rollcall: MTD, WTD, YTD, Sales Liability, Net Sales.

10. **Check same numbers, or one-offs?** Users tend to follow the same pattern upon login, but tend to check each figure once per login.

Sales Liability

11. How do you want to see sales liability?
District Managers:

- Prominently displayed
- Display 2 week view
- Want to be aware on sales liability earlier in the month

Sales Executives:

- Total amount for the month, and individual team members broken out by no-starts, bad business, audits
- Display 2 month view
- View by team members

12. **Do sales liability numbers remain relevant throughout the month?** Yes. Audits may come through at any time that impact the numbers.

13. **Would a 3-month view be helpful?** Both DM's and SE's felt that this would be helpful.

Earnings

14. How often do you check?
Users check their earnings roughly once/month. It's unclear exactly why this is but may be because it's not relevant to daily workings, or because the system doesn't update quickly enough for it to be relevant. Suggestion that SE's may find it more relevant because it shows the earnings of their team.

Expectations for iPad app

15. What do you want to see first?

Sales Executives:

- 5 users: MTD
- 3 users: WTD
- 2 users wanted to view: Liability and YTD
- Users also mentioned individually: PE Search, What deals are comprised in above, Team members, Territories

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District Managers:

- 2 users: MTD
- 2 users: WTD
- 2 users: Liability
- Users also mentioned individually: Commission, Audits, Positives & Negatives

Notifications

16. What types of notifications would you like?

- 8/10 users - When a deal has been keyed
- 1/10 users – When I hit over 100%
- 1/10 users- When a deal rolls
- 1/10 users - Sales Intervention
- 1/10 users - When Rollcall hits, with DM name and amount

3/6 users indicated they would like notifications on sales and quotas
4/10 users said they would like commissions notifications, 3 said they would not, and 3 said they were unsure.
6/10 users indicated they would like to receive sales liability notifications.

Evaluation of the iPad App – Dashboard View

17. Reaction to visual design and content

- 10/10 users liked the look and content on the dashboard
- 3 users did not find Top Deals useful
- Users wanted to be sure that they could click on the items in the Dashboard to drill down into further detail

18. Charts

- 8/10 users found the charts helpful.
- 1 user recommended a bar graph
- 1 user recommended a pie chart

Other thoughts for the charts:

- Predictive analysis chart for SE's -- similar to the arrow in Rollcall
- When did the numbers last update
- Separate tab for liability
- SE's presented a bit of a contradiction: they said that the charts were helpful, but also emphasized the importance of seeing individual team members listed
- Use one color to indicate positive quota, another color to indicate negative quota
- Major and National accounts and other sub-variations may have different needs

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19. Charts vs. Data Tables
- 4/10 users - prefer charts
- 2/10 users - would like both
- 2/10 users - prefer tables
- 2/10 users - don't care
- 1 user would like to be able to download a file of the data

20. Add/Change/Remove anything?
- Include client plan #
- Sales Liability page, listed by team member
- Earnings and see SBS split sales
- Progress to President's Club and other rewards -- some sort of column on this
- Trends for forecasting
- Don't want earnings - remove it
- Breakdown of splits
- Use commission as a motivator
- Show how much liability/audits each person has, and negative or positive number that would be reflected
- Take out week to date

Icon Review

A. Menu
B. Home
C. RollCall
D. Liability
E. Earnings (YTD)
F. Dashboard
G. Settings
H. Contact
I. Share
J. My Team
K. Search

Users were clear on the following icons:
- 1 – search
- 2 – settings
- 8 – liability
- 11 – home
- 13 – menu
- 15 - earnings

Users were somewhat confused about 12 (Dashboard) and 10 (Rollcall), though comments suggested these could make more sense in context.

Other icons that may make more sense in context:
5, 6, 9 – My Team / Contact / Message

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4 – Dashboard
Consider avoiding using both icons 5 and 9 in the same app

Icon 3, share, was consistently confusing for users as they thought it was a “back” button.

21. Reaction to app title Sales Beacon

- 2 positive, 3 negative, 4 neutral
- Suggestion that the app doesn't need a name and users will default to calling it Oracle.
- Suggestion to call it Oracle Dashboard

22. Was the app missing anything?

- Visibility on progress towards target for Presidents Club
- Ensure that the data in the app come from a trusted source
- Share button, e.g. to let a partner know what a split is worth
- Product Entity (PE) search
- Automated e-mailing to ADP if numbers look off
- Contact information for other people at ADP
- Goals for different incentives throughout the year
- Export to Excel
- High level or year to date summary by month, listing dollar and percentage for each month, and the ability to do it for longer periods of time. That functionality, from overall team level down to a rep level

Immediate Changes

- Change or remove “Top Deals” on dashboard to “Deals this month”

Future Considerations for Phase 2 and beyond

- Do not display earnings for SE’s, or option to hide in case they are meeting with their DM’s
- SE’s want MTD info for DM’s
- Since users check Oracle to validate things they already know, how to automate the system of reporting when there is a discrepancy?
- The primary reason users check Oracle is to validate what they already know. So, it serves as a central accounting system when deals enter the pipeline, and secondarily for users it’s also showing more aggregate, long-term views of their work. Explore ways to make these 2 roles clearer and neater, and to help users gain more value from the aggregate figures – currently, some users do not have access to this information anywhere else.
- Add forecasting to Sales Liability for both DM’s and SE’s
- Given the wide range of priorities that users expressed for the system, consider providing customization and/or personalization for the dashboard
- Add file downloads/export
- Incorporate notifications, and different types of notifications for users to set, particularly Sales Liability and when a deal is keyed
- Incorporate different incentives, e.g. President’s Club, to serve as a motivator for users to reach sales goals
- Share button to allow for communication with partners on different deals
- Explore subsets of needs for different user groups, e.g. Major and National Accounts may differ from others in what they want to see
- The iPad is not dependable and sometimes crashes. Tech compatibility is key.

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Key User Quotes

"Not any one device does everything you need, which is unfortunate."
- *Roger Reynolds, SE*

"I've caught mistakes before in Oracle, something that was input incorrectly. If you don't catch it nobody will."
- *Elizabeth Harris, DM*

"If we had it more easily accessible like through our iPads we'd probably look at it every day at the end of the day, but it's just right now, you can't really take a look at Oracle on the iPad so its usually when I'm using my laptop and I use it so infrequently now."
- *Chris Walton, DM*

"Id love to be able to access my Oracle when I'm outside of my office and not have to go back to my laptop and pull it out and start it up. A lot clunkier than the iPad. With the iPad a couple clicks and you're right there. The computer you have to fire up, go through VPN, and go through Sales Force. It's a pain in the butt."
- *Elizabeth Harris, DM*

"I like to see hard numbers, just because it makes me feel like I can control that better than having to raise a percentage. Like if I'm 60% away that's a little harder to psychologically absorb then, oh, I'm only 5 grand away. Or I'm only 3000 away, I know I can jump that extra 40% in one deal, but when you see it."
- *Matt Pepe, DM*

"Seeing where you stand right in the moment vs. other reps doing the same job, it's very important because it spurs competitiveness and activity and gets you going."
- *Mario Lukin, SE*

"I like the charts. Sales personalities like to see things that are getting completed. Get that visual confirmation."
- *Luke VanDomelen, DM*

"I think it would have kept the anticipation of re-starts and no-starts on my mind, on a regular basis. That's something as sales reps we need. We need to be reminded of the liability that's out there, whether it means we push another sale or get out in front of the restarts. It would be very helpful, absolutely."
- *Luke VanDomelen, DM (hasn't used Oracle because he is relatively new)*

"I could say this is something we would utilize a lot, especially if it's easy to navigate."
- *Anthony Nastasi, SE*

"I think it looks incredible I think its something that's really going to be beneficial really give us the opportunity to stay on top of our sales, stay on top of the things when it hits, especially when its stressful and it's months end."
- *Matt Pepe, DM*

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