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Story

Every day Willy Wilson visits his retailers (technology branch) by company car to advise them about their needs and potential for improvements.

The list of retailers, which have to be visited, is getting updated by his supervisor. Willy receives those updates each time he opens the app or refreshes the list of retailers. The visits are initially ordered by the travel distance (measured in real-time with the GPS-signal of Willy) and the appointment date and time.

After entering the retailer's store, he clicks the "Check-In" button of his app to record the time the visit takes. The creation process of the protocol is started,

On a visit, Willy has to complete a list of specific and pre-defined tasks. For example, the store manager has to sign the protocol or Willy has to take a picture about the product placement. Each task opens an individual and guided dialog to support the process. After finishing a task, the results are stored in the protocol.

When leaving the place, he clicks the "Check-Out" button to report that he successfully completed the visit. The protocol has been finished and will be transmitted automatically to Willy's supervisor.

Persona

Name:
Willy Wilson

"For me, I would like to…" :
focus on retailer visits to create protocols.

Background:
32; Unmarried; Working as an established salesman since his in-firm training 14 years ago

Job Title / Role:
Salesman in the field service

Job Responsibilities (Main tasks and frequency):
Working on the retail visits which were allocated to him by the supervisor, that means:

- visit the retailers who requested a visit or have to be visited in a period of time

- complete a list of tasks (e.g. product placement, competitive prices, …)

- report working time

Main Goals:
- complete all assigned tasks

- reduce the time visits take

- transmit the protocol to supervisor

Needs:
I need an overview of retailers allocated to my journey in an optimized order.

I need to be prepared: to know which tasks have to be completed.
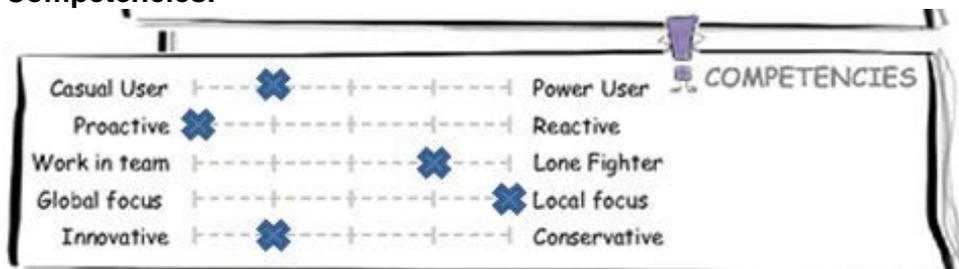
I need to document my work easily.

Pain Points:
- losing time by visiting retailers in a disadvantageous order

- missing knowledge how to complete specific tasks

- documentation of my work is annoying and time-consuming

Stakeholders:
- supervisor
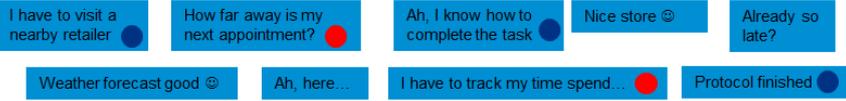
- retailer

Competencies:

User Experience Journey

Current User Experience Journey
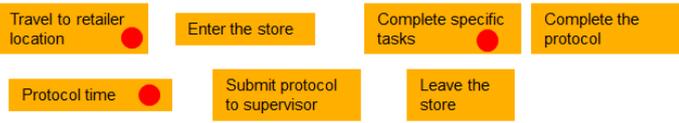
Duration of the Journey: 60 min

Mindset

What is on the Persona's mind while taking the actions of their journey? How do they feel each step of the journey?

| I have to visit a nearby retailer ● | How far away is my next appointment? ● | | Ah, I know how to complete the task ● | Nice store ☺ | Already so late? |

| Weather forecast good ☺ | Ah, here… | | I have to track my time spend… ● | Protocol finished ● |

Actions

What actions and activities does the Persona take while going thru the journey to achieve their goal?

| Travel to retailer location ● | Enter the store | | Complete specific tasks ● | Complete the protocol |

| Protocol time ● | Submit protocol to supervisor | | Leave the store |

Touch points

What touch points does the Persona have? (Tools, channels, devices, conversations, and so on.)

| Retailer | Customer | Cashier | Shelfs |

| Company Car | | Mobile Device |

Point of View

Willy, the established salesman, needs a way to simply complete task during his retail visits so he can focus on the retailer needs and improvements.

Mock Up

- Link to Splash&Build Preview
  https://standard.experiencesplash.com/api/projects/e8817ac9102247a90baaf058/prototype/snapshot/latest/index.html#/1458634407863_S0

- Master-/Detail-Screen (Details)

- Master-/Detail-Screen (Location)

- Master-/Detail-Screen (Tasks I)

- Master-/Detail-Screen (Tasks II)

- Notes
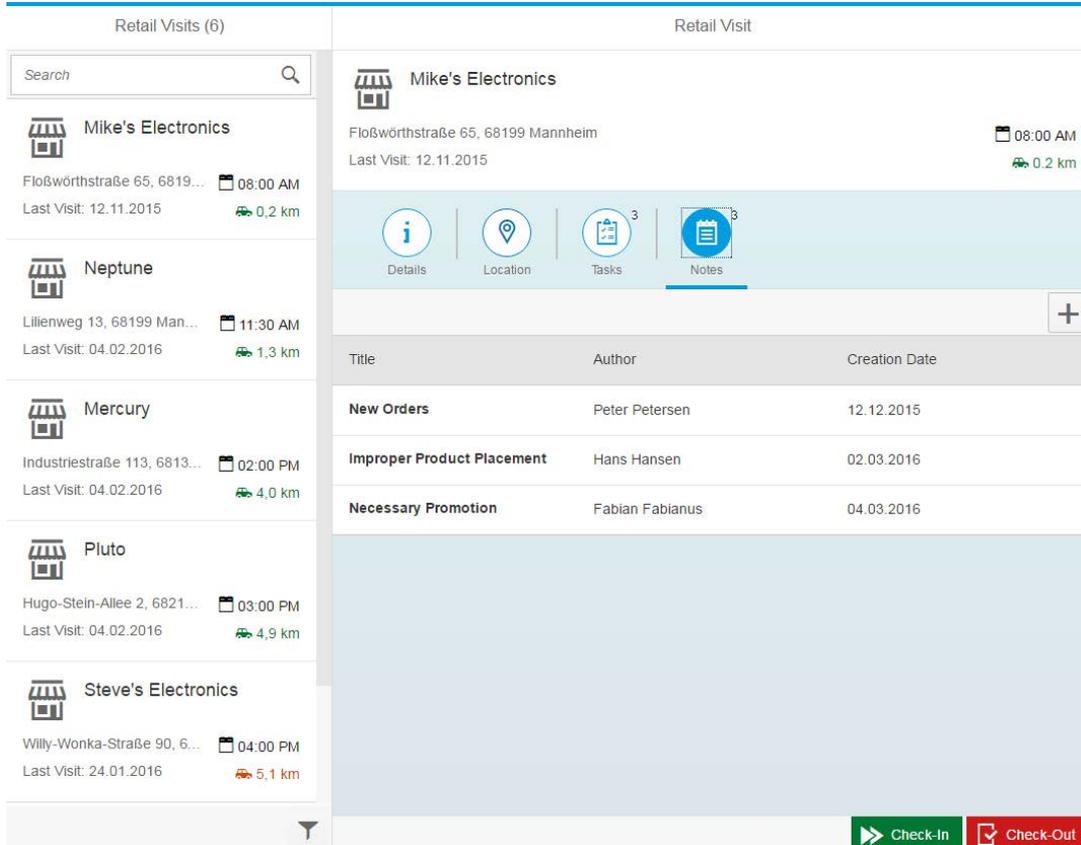
Developed App via YouTube-Link

https://youtu.be/drtyjRE1Y_U