

Develop Challenge

1. Story

This application will address the challenges faced by any sales representative working in a high volume opportunity and quotation environment, typically with hundreds of opportunities in the pipeline at any given time. The targeted scenario involves an inside sales agent, Jack, in a call center environment of a company that sells configure-to-order industrial machinery.

The agents have three primary sales related tasks – responding to inbound calls, making follow-up calls they have scheduled for themselves, and following up on opportunities flagged by someone else in the organization that are related to a campaign or otherwise significant. During an inbound call the sales team will assess the performance requirements of the prospect in order to provide a competitively priced solution. The team's mission is to provide everyone that calls with a quotation even if they suspect the prospect is not likely to purchase. For those that do progress, however, begins a truly collaborative effort amongst the sales, engineering, production and back-office teams.

Although the interaction center capabilities of the current CRM system are well established and successfully support much larger organizations it is perceived as cumbersome and has not been well received. It forces them through a rigid sequence of first finding and confirming the account and contact then creating unnecessary transactions before finally providing access to the opportunity. With more open opportunities than he could possibly follow-up on Jack targets certain opportunities for follow-up by putting them in the following categories:

- **Priority** *The most time sensitive; a delay here could cost you the sale.*
- **Follow-Up** *These have a date you've previously set for a follow-up call.*
- **Targeted** *Flagged by someone else as relevant to a campaign or other initiative.*
- **High Value** *A high expected sales volume that keeps it on your list.*
- **Probability** *A high chance of success that is close to closing.*

Jack needs a user interface that works the way he does, leading to increased productivity for him and improved results for the business.

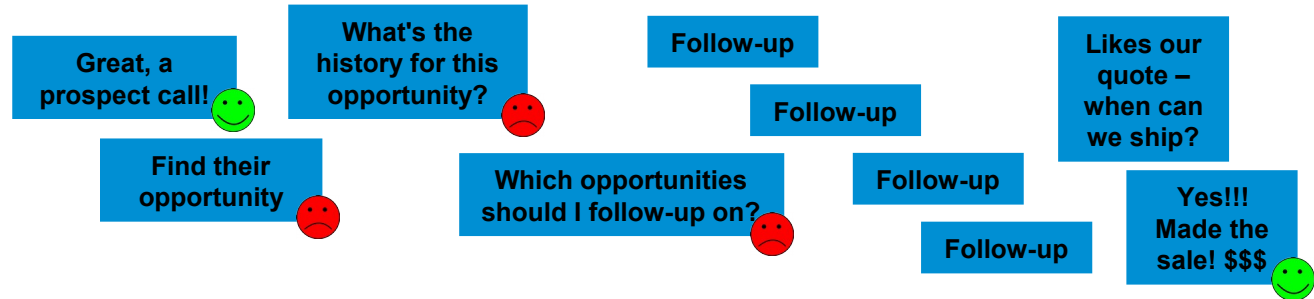
3. User Experience Journey

Current User Experience Journey

Duration of the Journey: 8 weeks

Mindset

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



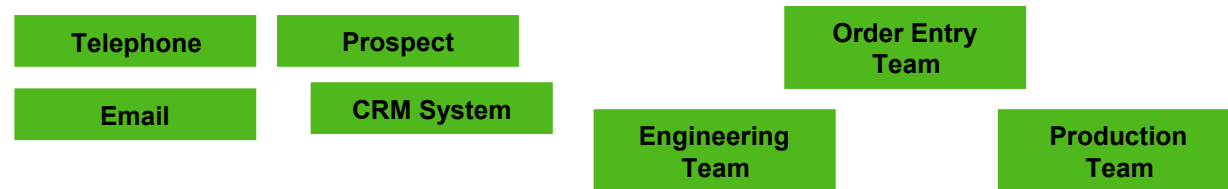
Actions

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



Touch points

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



4. Point of View

Jack needs a way to quickly access all details of an open opportunity so that he can effectively increase daily interactions and convert more opportunities to sales.

5. Mockup

The application will use a list based floorplan to present an opportunity list and should allow filtering and searching. Clicking on an opportunity will navigate to a details page.

