

Kevin Kell, M.A.

Peninsula, SF Bay

Product Designer / UX Architect @ ServiceNow

- Traveled around the world (26 countries)
- Coaches soccer for AYSO San Carlos
- Volunteers for school activities (creative director of haunted house)
- Designed own house / constructs projects by hand
- Helps kids learn about investing
- Studies soil science and permaculture

Shanshan County Turpan, Xinjiang,
China 42.834284, 89.864778





TOPICS

Journey

Philosophy

Process

Architecture



So, you want to be a designer?

- Started in a Social Psychology doctorate program at Cincinnati – became interested in a design discipline within Human Factors called Human-Computer Interaction
- Researched and wrote a masters thesis on HCI, and published the thesis in “Computer in Human Behavior” an international journal
- Took a masters degree to pursue a job in technology
- Wanted to become a designer but couldn’t without experience
- First job was as a user researcher but worked at night to learn design and was promoted to a designer position by the company

Designer Journey

20 years + experience
as a UX Designer

B2B Enterprise Apps - SaaS/Cloud
B2C Web Applications



Masters in Social Psychology (HCI focus) – Published Thesis in Computers in Human Behavior

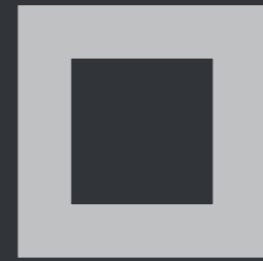
Ran a successful boutique design consultancy
(Intuit, Yahoo!, Intel Capital, Dreamworks)

Worked on large projects for Cisco and Apple

Started a UX practice for Badgeville, an enterprise Gamification startup

Redesigned legacy products and designed new SaaS/cloud products at Oracle

Currently UX Architect at ServiceNow
(Platform / Portal / Landing Pages)



HIGHLIGHTS & ACHIEVEMENTS

Some interesting projects and achievements that showcase my effectiveness and impact.



Conducted over 40 user research studies



Lead designer for iPhone and iPad sales tool for VP of Global Sales



Redesigned Cisco.com's Learning area, resulting in revenue growing from \$150m to \$400m yearly (according to stakeholder)



Redesigned Intuit.com's homepage and navigation architecture (audience size ~ 10 million)



One of the lead designers of the primary support platform responsible for \$20 billion in yearly revenue



TOPICS

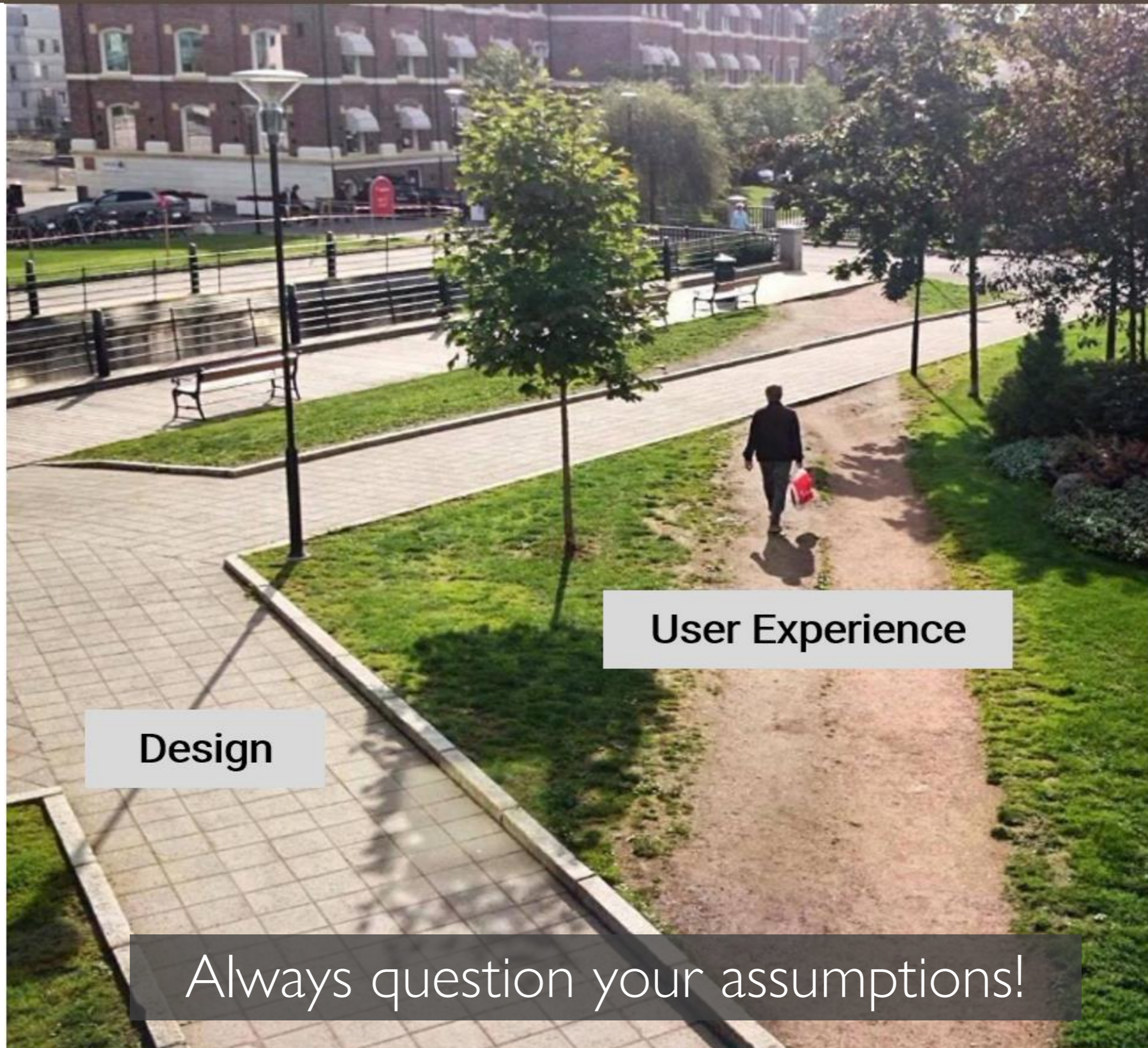
Journey

Philosophy

Process

Architecture

Intention



Outcome

Design

User Experience

Always question your assumptions!

What is User Experience Design?

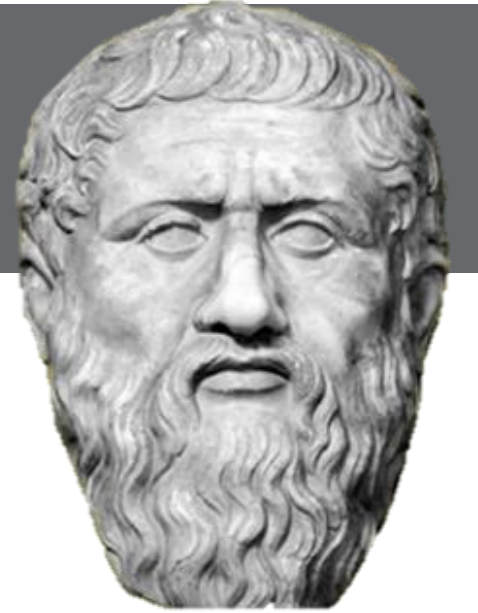
Experience design

is matching creative ideas and innovations to real-world problems and in doing so, making users' lives better.

A UX designer

is someone who thrives on addressing complex challenges and strives to make their solutions simple and elegant.

Core Philosophy



Plato. Not an actual user.

It's all about the user. (period)

User-Centric Experiences deepen the Customer Relationship

Effective experiences → **Higher satisfaction** → **More engagement**

Product Experience First

Features



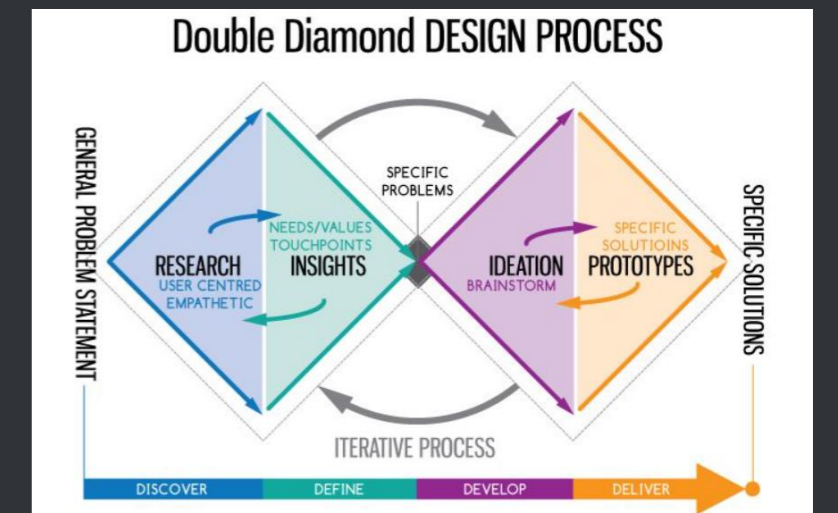
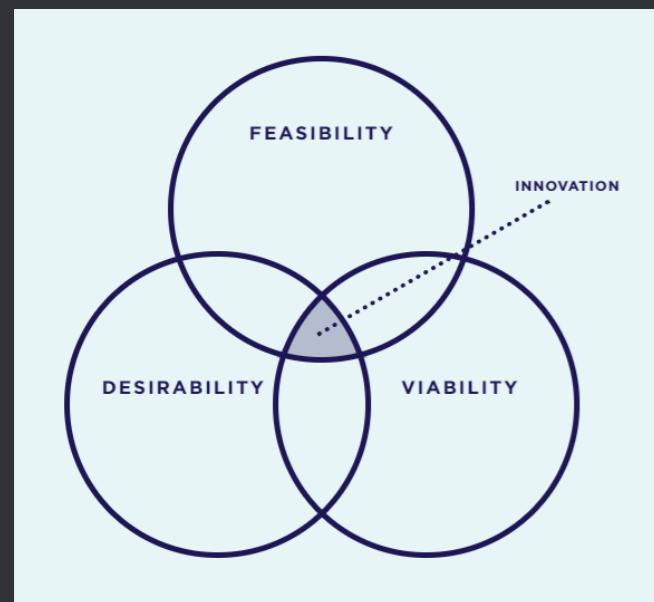
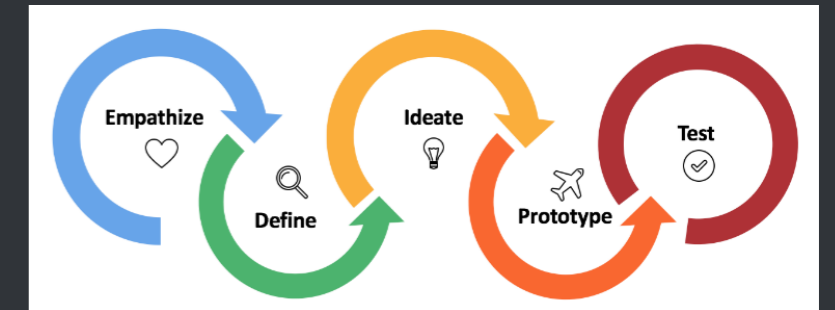
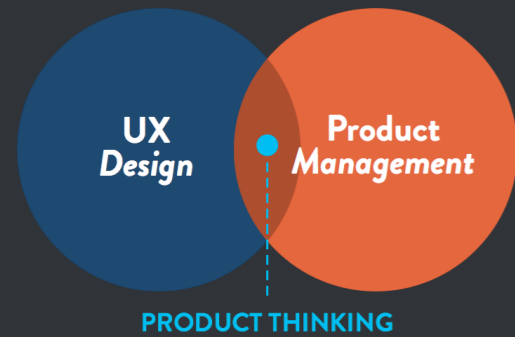
Product



Features focus creates design debt!

Product Thinking

- Love the problem, not your solution
- Think about products, not about features
- Use product heuristics (goal-focused, anticipate user needs, minimum viable quality, etc.)



Desired UX Design Outcomes

Useful

- Does it operate in ways users will find value in?

Learnable

- Can it be learned quickly?

Memorable

- Do they have to relearn it each time they use it?

Effective

- Does it get the job done?

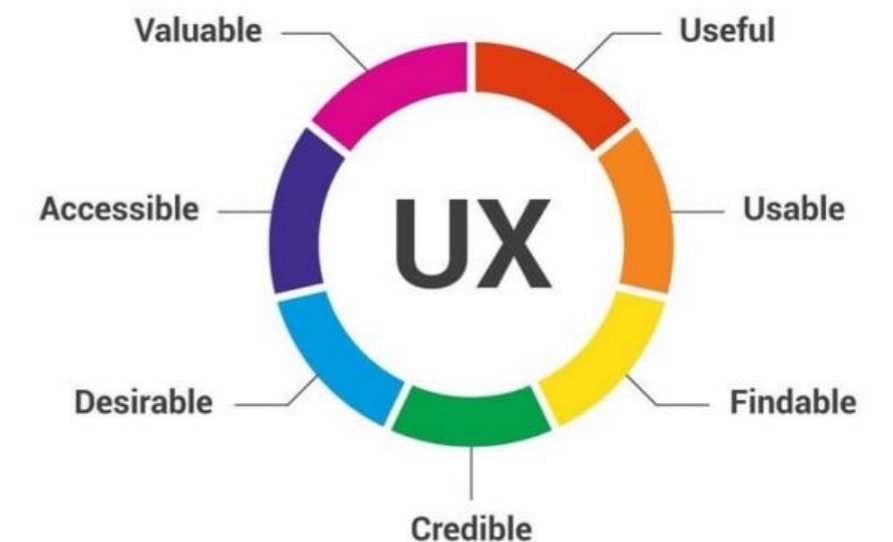
Desirable

- Do people want it?

Delightful

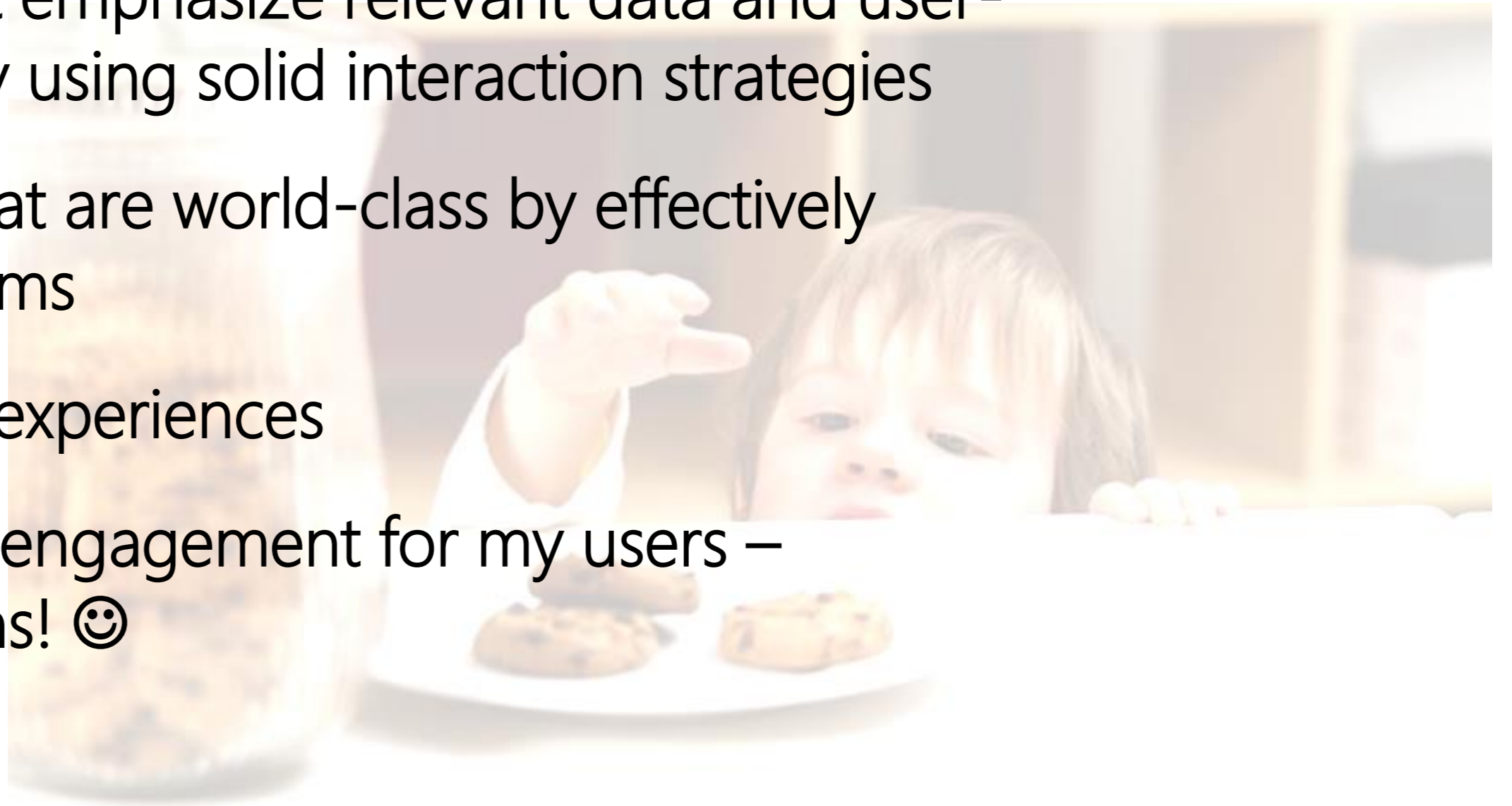
- Is using it enjoyable, or even fun?

The 7 Key Elements



My Goals as a UX practitioner

- Create designs that emphasize relevant data and user-focused features by using solid interaction strategies
- Design products that are world-class by effectively solving user problems
- Craft modern user experiences
- Create delight and engagement for my users – remember emotions! 😊





Emotions are Important

No one buys a Lamborghini for the gas mileage

You might buy a Lamborghini for the art, the style, the speed. None of which has to do with economy.. The car commands a high price because it makes buyers feel something.

Design is the driver of emotional engagement.

The Cause of Modern Design

Principles of Modern UX

Kevin Kell, UX Architect



Prescriptive - AI (Wisdom + Insights that are actionable)

- Organize and Prioritize
- Wisdom not data
- Dynamic not Static
- Automation of simple tasks
- Reactive

Knowledge: Contextual and Relevant Content

- Recency / Frecency
- Curated - Role-specific or

Info Meaning: Comparison & Baselineing

- Comparison
- Gamification
- Understand relative performance

Personalized & Customized Experiences

- Personalized & Customized Experiences

Convenient

- Don't make me interact
- Minimize Navigation
- Visual UI
- Streamlined / Simple First
- Rapid scaling
- Social / Collaborative

TOPICS



Journey

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Where I Shine

Research

- Researching and identifying the user's and needs and validating as I proceed

Value

- A design-thinking approach that emphasizes user & customer value over features

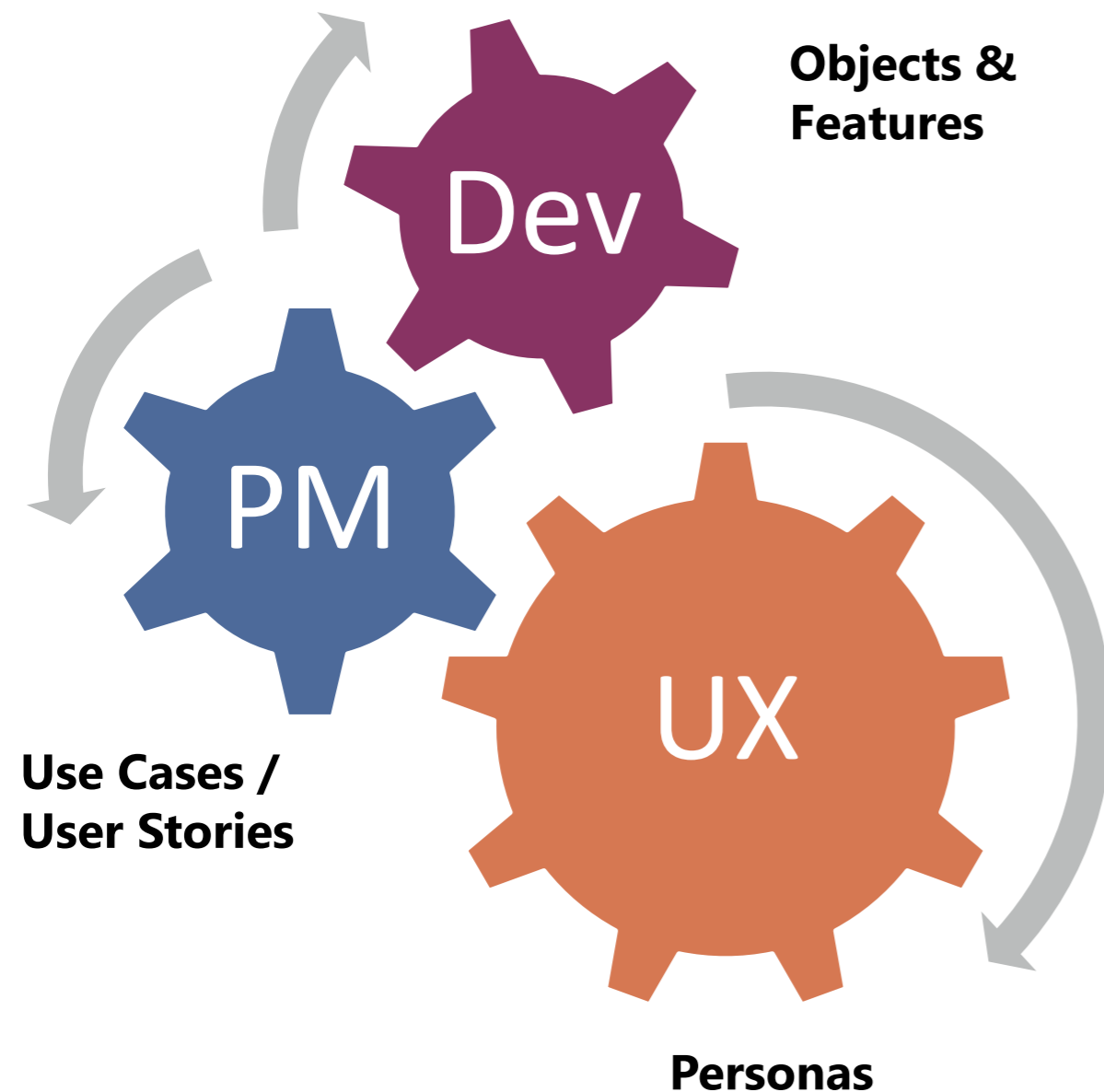
Modeling

- Analyze and model task flows/processes that will support the user's goals

Full cycle

- End to End design from conceptualization to finished specs

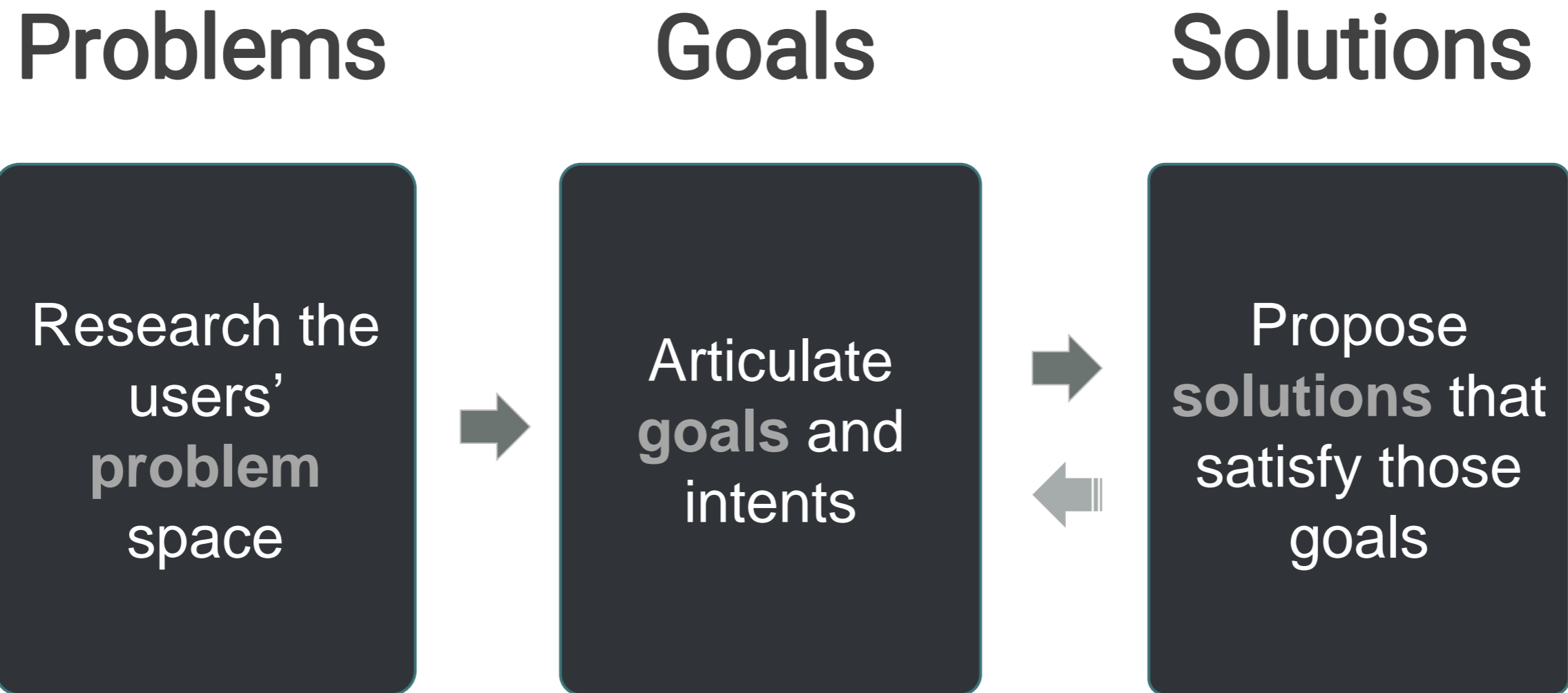
Product Development Process



AGILE Cross-functional teams

- The product development system is interdependent
- UX works with PM to define requirements and create product vision + concepts
- UX works with Dev to get designs implemented and to validate the output

A Framework that Works



Problems and goals serve as a reality-check for your solutions

Strategic Deliverables

Expert Review

Business Goals

P-G-S

Task Model

Info Architecture

Scenarios

Use Cases

- **Review** what's been implemented to date
- Documentation of the **business' goals**
- Articulation of the user's **problems, goals, and solutions**
- **Model** of user tasks (with objects, relationships, contexts, etc.)
 - Tasks can be critical, frequent, or incidental
- Analysis of existing **Information Architecture** and a proposed new one
- **Scenarios** that describe the user's aspirations and what we're providing them to achieve those, reflective of task flows, and use with 'day in the life' analyses and key moment artifacts
- **Use cases** (or user stories) that support each major goal of the user

User Scenarios and Signature Moments

★ Metrics that Promote Success

Create successful organizations through automated workflows

Scenario

1

After the call Albert affirms Eric's Security Settings skill since he was able to so quickly solve the problem, enhancing his reputation on the system which leads to his getting more such issues routed his way by the system. Eric also gets a boost on the leaderboard.

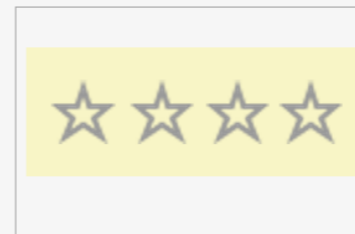
2

Albert is able to mark that he wants more issues like this so the system issues further training to enable routing more such issue types in the future.

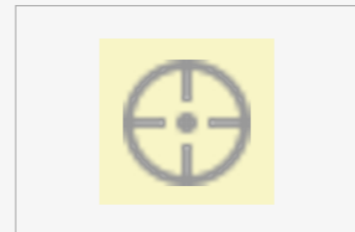
3

In the wrap-up Albert types that it's likely they'll see more of the same issue in the future so the system analyzes new issues for a pattern cropping up like what Carl had. When enough problems are seen and a pattern is identified, the appropriate action can be taken, e.g. fix the product, improve the knowledge base, or train agents.

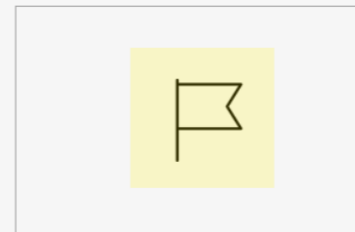
Signature moments



Agent-driven skill scoring.
Help analytics to dynamically change routing.



Professional development.
Interests and goals drive training and routing.



Analytics kick off watches for patterns based on new issues that are identified.



TOPICS

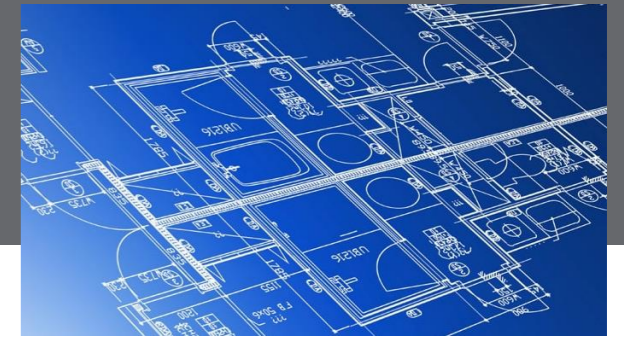
Journey

Philosophy

Process

Architecture

How the UX Architect thinks



Systems

- Drive systems thinking into the organizational fabric through evangelization and artifacts.

Questions

- What's the appropriate future based on the strategy? How do we add features? How are people using the product now?

Modeling

- Process and modeling: how does all this fit together?

E2E

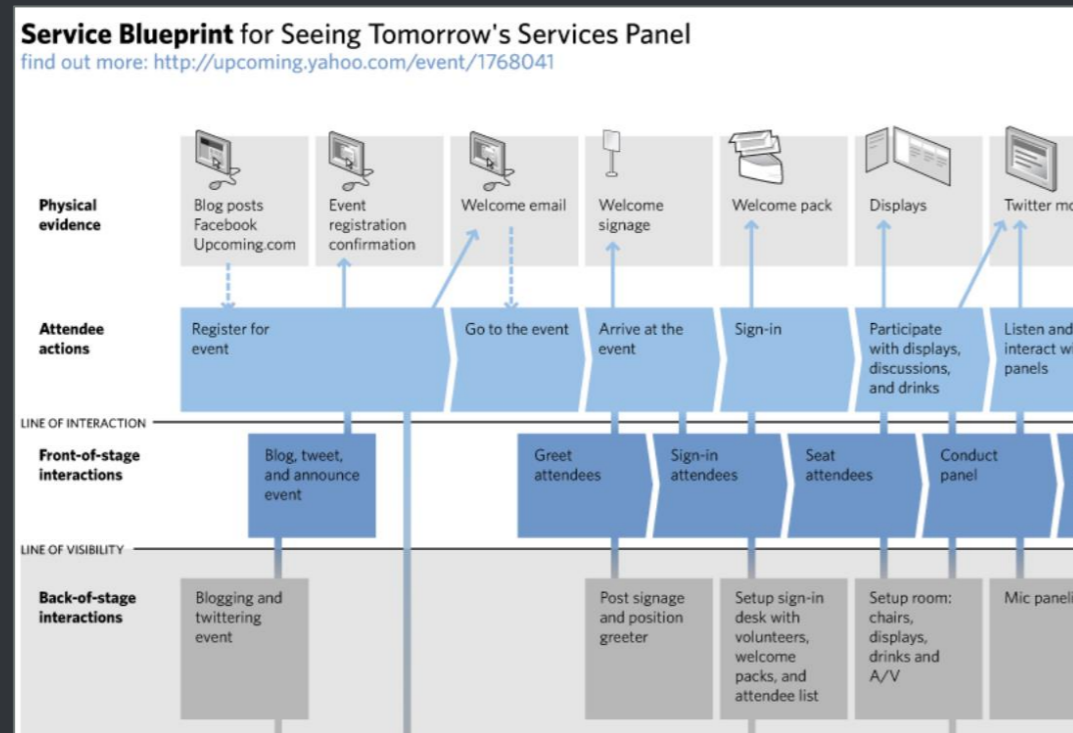
- An end-to-end view that can identify gaps and opportunities in the experience

Concepts

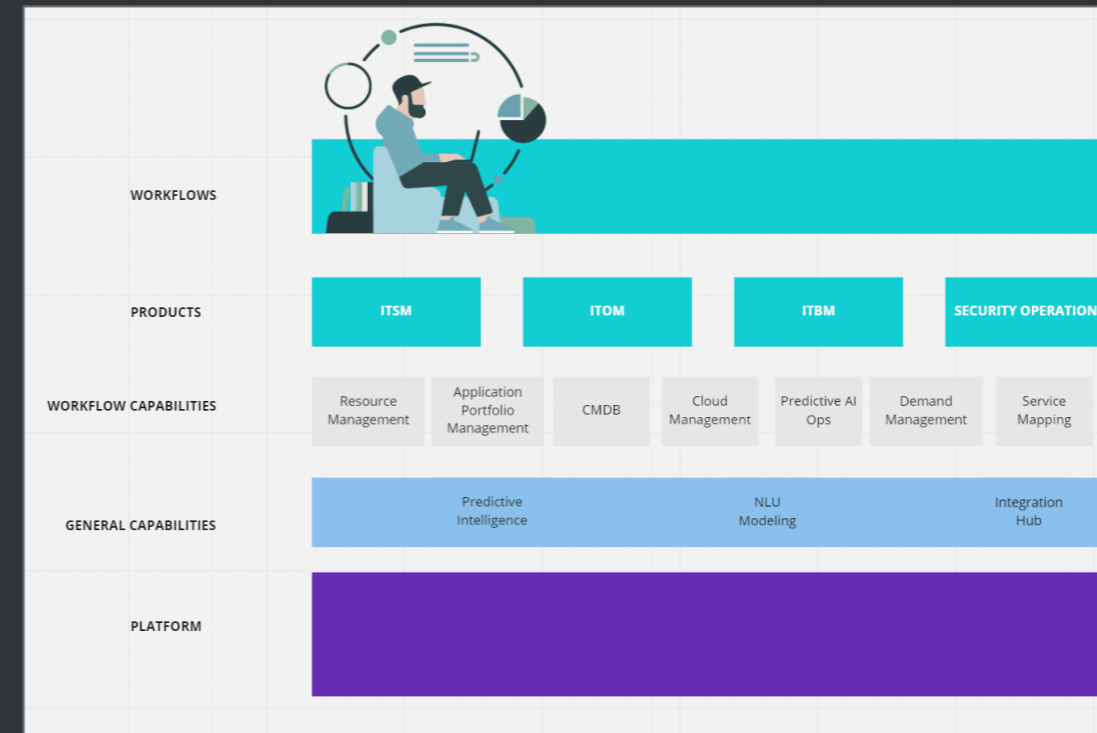
Holistic | Value or benefit | Large & strategic Patterns | Experience risk / opportunity |
Optimize vs. Innovate | Patterns in the chaos

Architectural Deliverables

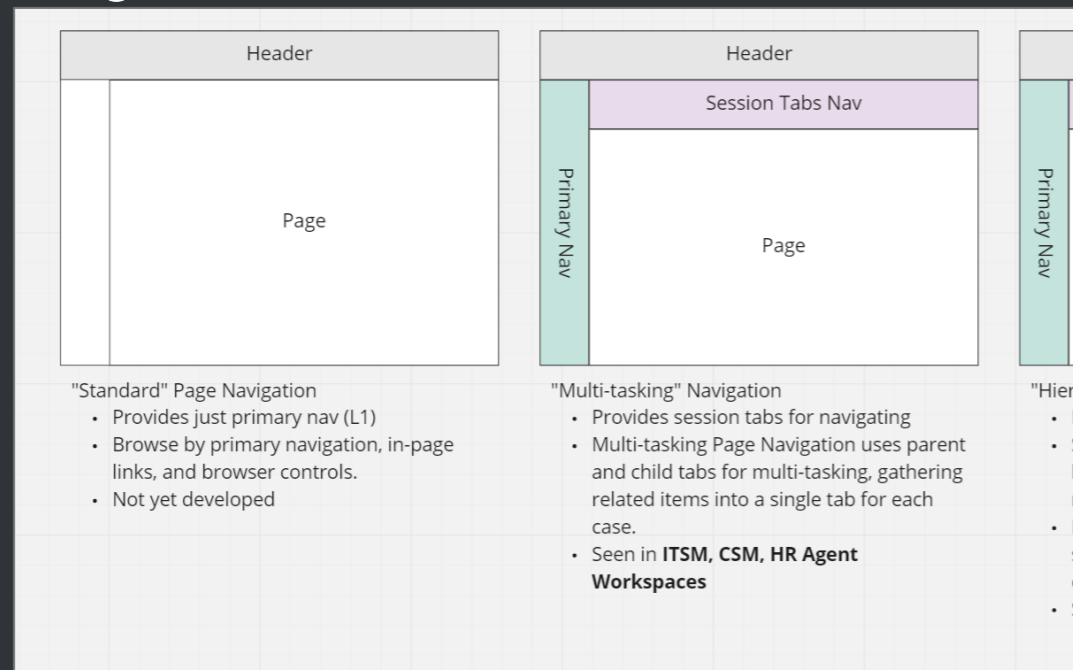
Service Blueprint



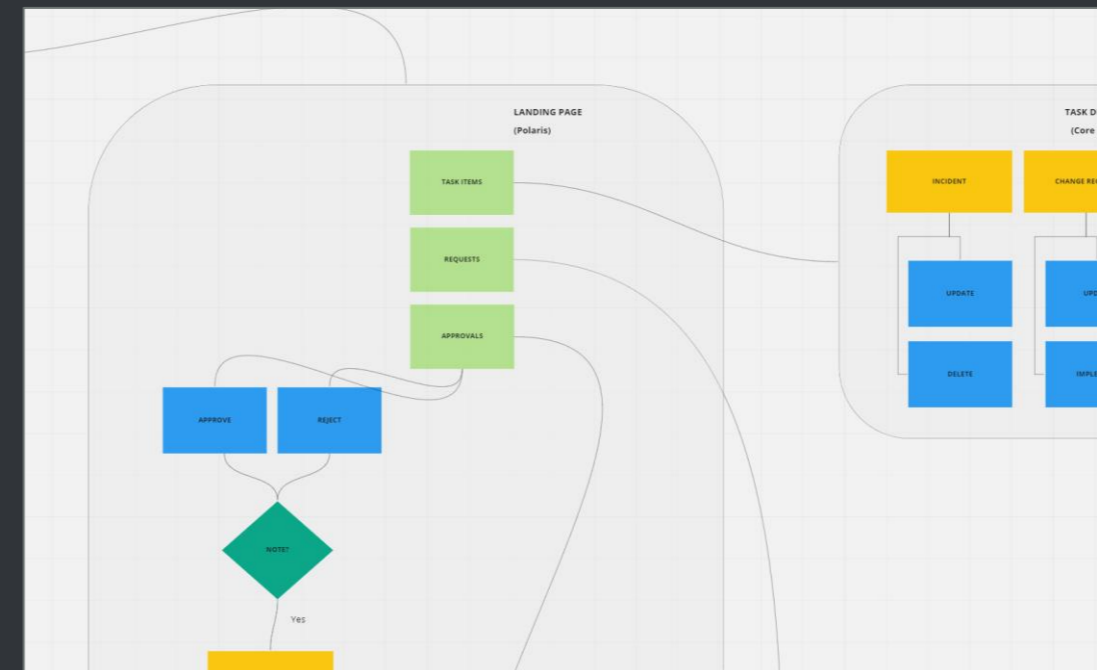
Taxonomy/Mapping



Navigational Models



End-to-End Flows





Field Sales Concept for Sales Cloud

Project and Goal

One of the Sales Cloud projects I was tasked with by the VP of Product Management was to design a point solution for Sales Pipeline Management, but first I needed to understand the user, the Field Sales Representative.

Activities

- Worked with Senior Oracle Field Sales Reps to collect needs, tasks, questions, and scenarios
- User research, concepting, wireframing
- Designed initial concepts

Outcomes

- I expanded the scope to include general field sales use cases
- The project was incorporated into the nex-gen Sales Cloud designs

Goal is to develop concept solutions for Field Sales

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

Key use cases are centered around field sales and pipeline management

How do we get there?

#4: Beware the 5 Pipeline Killers

Once you start paying attention to the 3 metrics listed above, you'll start to notice that some of the opportunities in your Pipeline are outliers, which can clog your Pipeline. To maintain Pipeline integrity, you should remove these outliers from your Pipeline.

But how do you know which to purge? Watch out for these 5 signs of Pipeline Killers:

- 1. Age in Stage** – Stalled deals convert at much lower rates than quickly progressing ones. Look for opportunities in your Pipeline that have **stayed in the same stage** for as long as your average Lost Deal and flag them as at-risk.
- 2. Non-Linear Stage Leaps** – The beauty of the Sales Pipeline is that it matches up so well with the buyer's journey. Therefore, if an opportunity goes through the Pipeline haphazardly without a linear progression, it usually means that that opportunity is less likely to convert.

Understand the domain

Raphael B.
people.oracle.com/@rbi
Application Sales Representative
West Conshohocken PA, US 1:20 AM Thu

“Gap between what they use and what they're supposed to use on Sales Cloud”

- How do I get 10/20 to 30/40's?

Empathize with the user

Problem	Goals
Don't have a feel for what's going on with my pipeline; Need to know what's been done or changed	Understand: Want to see my pipeline (whether I'll make quota). Which are late? Surface activity of my pipeline
Don't know what to work on - where should I focus my efforts? What are next steps?	Prioritize: Decide which Opportunities to work on and also plan out my time/activities
Need to work quickly to get a deal with customers and team members	Communicate: Send materials, assign tasks
Hard to keep things up to date	Document: Update opportunities and easily communicate the updates
Have to keep my pipeline full	Develop: Find new opportunities for prospecting

Articulate Problems, Goals, & Solutions

Author a proof-of-concept

Understand the Domain

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

Get to know the typical concepts and problems in this space.

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2. **Non-Linear Stage Leaps** – The beauty of the Sales Pipeline is that it matches up so well with the buyer's journey. Therefore, if **an opportunity goes through the Pipeline haphazardly** without a linear progression, it usually means that that opportunity is less likely to convert.
3. **Opportunity Size** – An opportunity's size dictates a lot about how it will act and how

Field Sales Rep Interviews

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

Research Setup:

- 5 Oracle field sales reps on multiple occasions + feedback + iteration
- CX, CRM space, Health, Upmarket
- Tend to be less than 10 opportunities at a time

Exploring the context of use goes a long way toward understanding your users.


Users, In Their Own Words....

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes



Bill V
people.oracle.com/@bvi
 CRM Application Sales Manager
 Beachwood OH, US · 12:58 AM Thu

“Need a perspective on what's going on with an account”



Annie K
people.oracle.com/@
 Application Sales Manager
 Atlanta GA, US · 1:00 AM Thu

“My contacts can't be visible to my sales team (*Inside Sales reps*) will pick up contact and activity and start calling into that account - throws a wrench into that relationship!”



Cris P
people.oracle.com/@c
 Application Sales Manager
 Chicago IL, US · 12:07 AM Thu

What would make you 10x more effective?
“Text or instant thing on phone that says ‘Do you want document that?’”

I asked sales reps unique questions like:
 “What would make you 10x more effective?”
 Users would articulate their needs and problems, like *‘keep them from stealing my deals’*

Sales Rep's Own Questions

1: Problem & Process

2: User Interviews

3: Lessons Learned

4: Problems and Goals

5: Architecture

6: Concepts

7: Outcomes

- (When your boss asks) “How are you getting to your number this quarter?”
- “What are other deals, assets, purchases, or trouble tickets for this customer?”
- “What do I do now that I found out a competitor is on this deal too?”
 - “How do I put together a Kill Sheet for a particular competitor?”
- “The customer’s CIO is outraged on a P1 issue open for an entire month”
- “Sales Manager needs you to bring in one or two deals in the next few days to make the team’s numbers this quarter”

Questions reveal needs as well and create a realistic context for how Field Sales operates.

Field Sales Rep Persona

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

DANIEL RICHARDSON

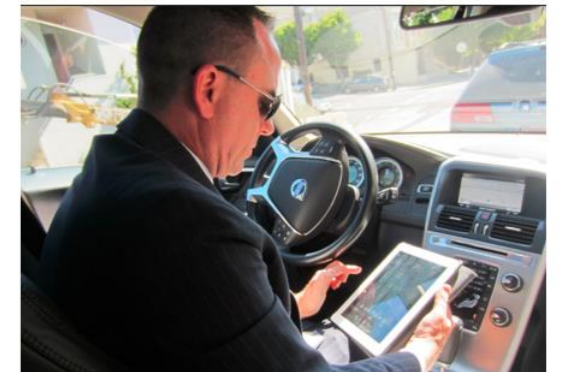
Field Sales Rep

AGE: 41

LOCATION: San Francisco, CA

EXPERIENCE: 11 years

WORK PATTERN: Road Warrior



Job Roles by Area	Persona	Typical Tasks	Critical Tasks	Focal Task(s)
Sales Representative	Daniel Richardson	<ul style="list-style-type: none"> • Prep for Client Meetings • Conduct Post-Meeting Activities • Communicate w/Sales Team and Management • Networking • Create proposals • Schedule meetings and follow-ups 	<ul style="list-style-type: none"> • Meet with stakeholders • Close Deals • Sign Contracts 	<ul style="list-style-type: none"> • Maintain Customer Relationships • Create trust • Help customer define the problem

A great way to understand the world of the user is to break things down into TYPICAL, CRITICAL, and FOCAL tasks

Eye-opening Findings

1: Problem & Process

2: User Interviews

3: Lessons Learned

4: Problems and Goals

5: Architecture

6: Concepts

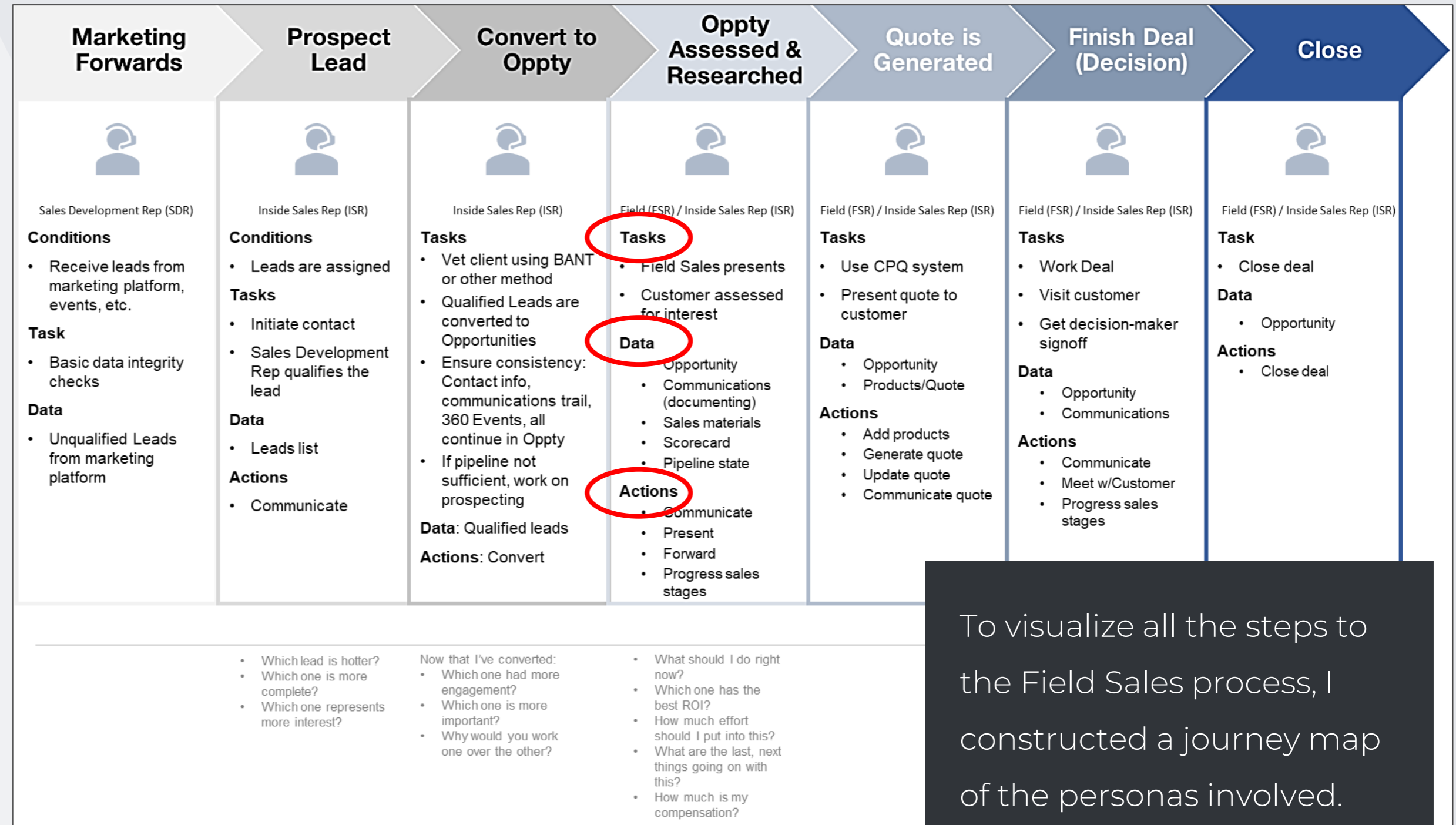
7: Outcomes

- ▲ Our biggest competitor is Outlook
- ▲ Oracle isn't even using its own software
 - Outlook integration isn't set up
- ▲ Several custom solutions have been made because the software doesn't provide the necessary solutions

There were some
surprising lessons-learned.

Field Sales Journey

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes



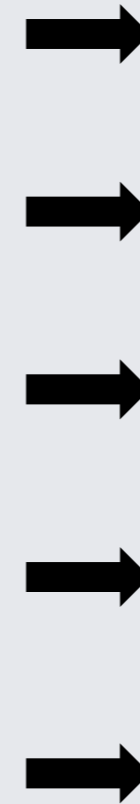
To visualize all the steps to the Field Sales process, I constructed a journey map of the personas involved.

Problems and Goals for an FSR

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

Main Problems

- Don't have a feel for what's going on with my pipeline; Need to know what's been done or changed
- Don't know what to work on - where should I focus my efforts? What are next steps?
- Need to work quickly to get a deal with customers and team members
- Hard to keep things up to date
- Have to keep my pipeline full



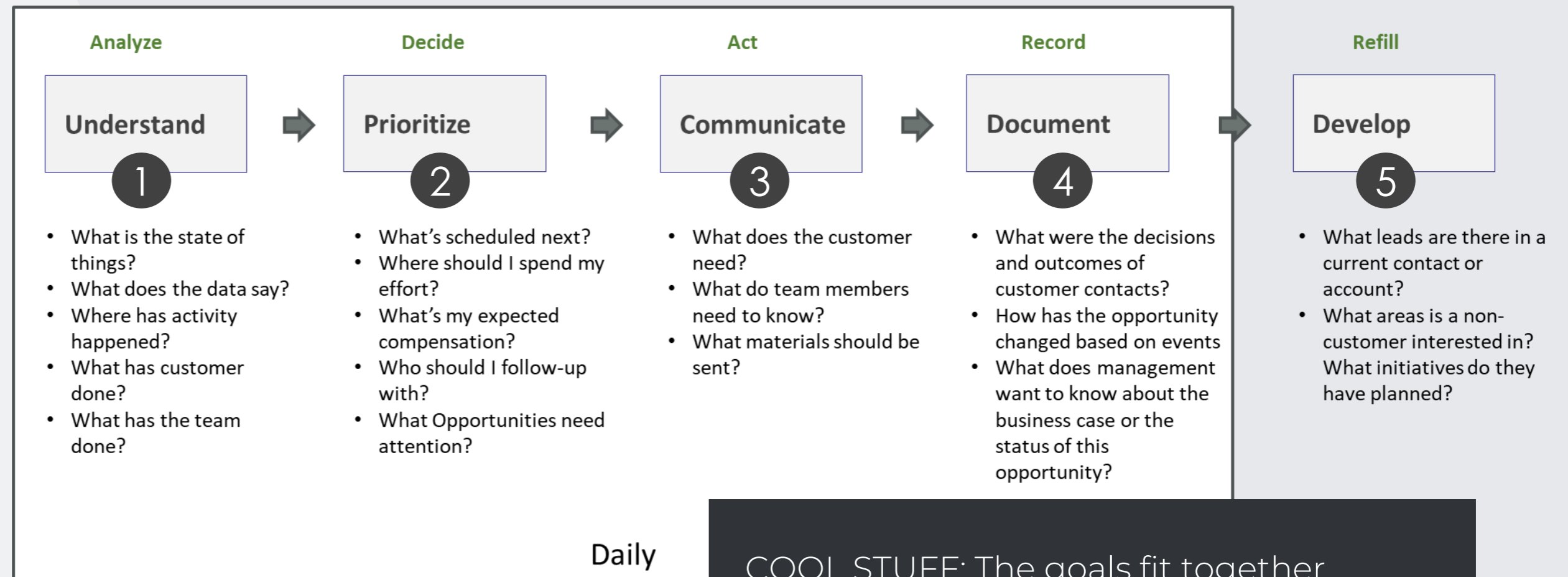
Goals

- Understand:** Want to see my pipeline health stats (whether I'll make quota). Which opportunities are late? Surface activity of myself and team...
- Prioritize:** Decide which Opportunities to work on and also plan out my time/activities
- Communicate:** Send materials, follow-up, assign tasks
- Document:** Update opportunities quickly and easily communicate their status upwards
- Develop:** Find new opportunities by prospecting

- Understand 1
- Prioritize 2
- Communicate 3
- Document 4
- Develop 5

Key insight: There's a Progression to This

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
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Solutions articulate tasks and data

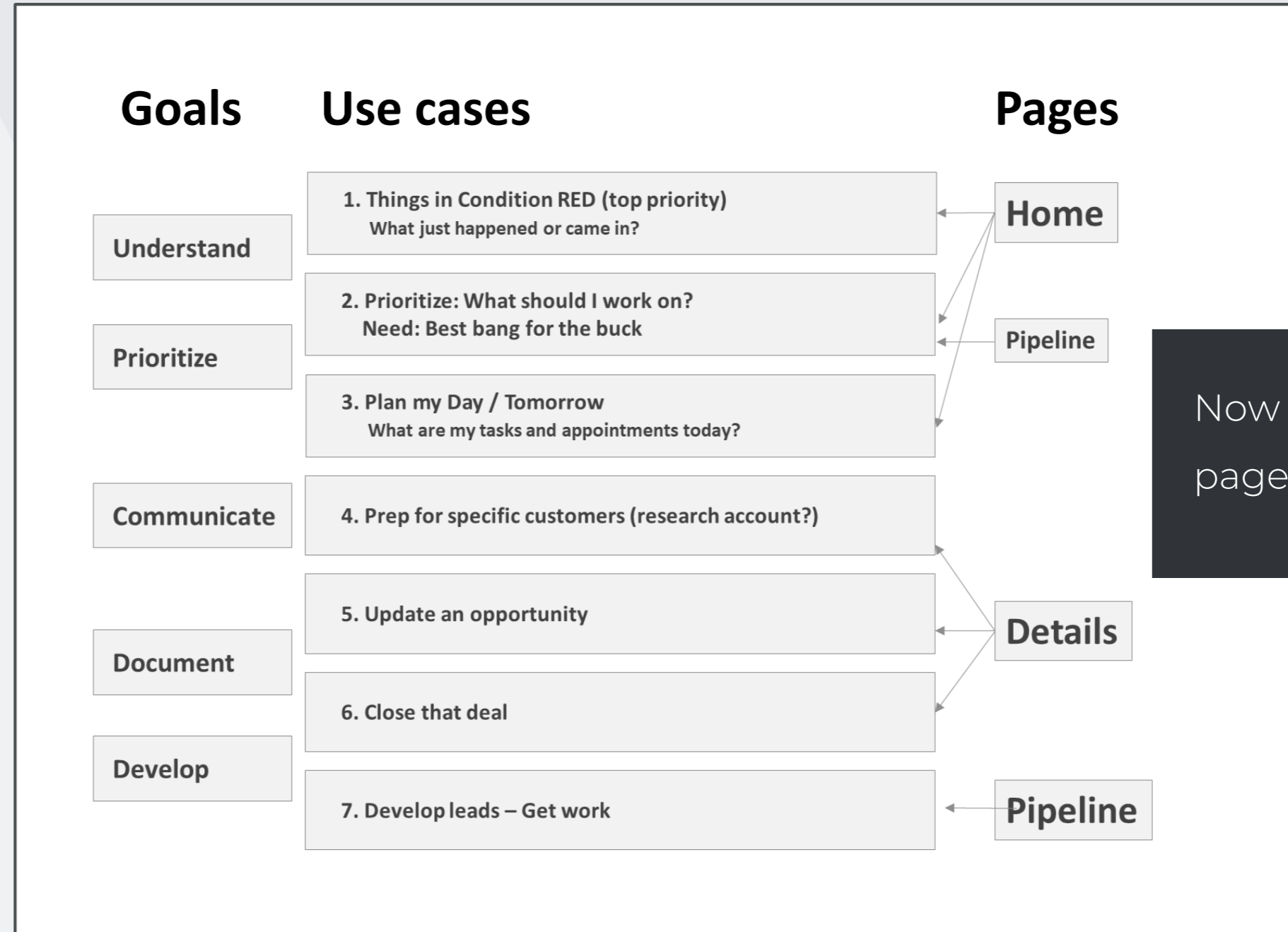
- 1: Problem & Process
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Goal	Solutions Tasks	Data
Understand	Browse the data; Monitor the state of contacts, accounts, team activities	KPI's, Stats, Visualizations, and Timeline Compare Oppty vs. Avg. Won Deal or Avg. Win sales cycle; Timeline (Macro), my/team activities to date, updates to contacts and accounts (Micro)
Prioritize	Look at compensation, and the most promising Opportunities; Figure out my next steps, and what needs to be done	W2 compensation per deal, (win % x deal size); Recommendations, Day/Quarter desired activities, follow-ups, tasks
Communicate	Send materials, follow-up, assign tasks	Task content, sales materials, meeting agendas
Document	Post-meeting data entry, build biz case for mgmt.	Call Logs, Meeting summaries, Scorecards, Actions to Close
Develop	Get leads from contacts, keep up-to-date with potential customers, look at leads per account	

By detailing out the solutions, we identify tasks to support and data objects that users will need

Prospective Architecture

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
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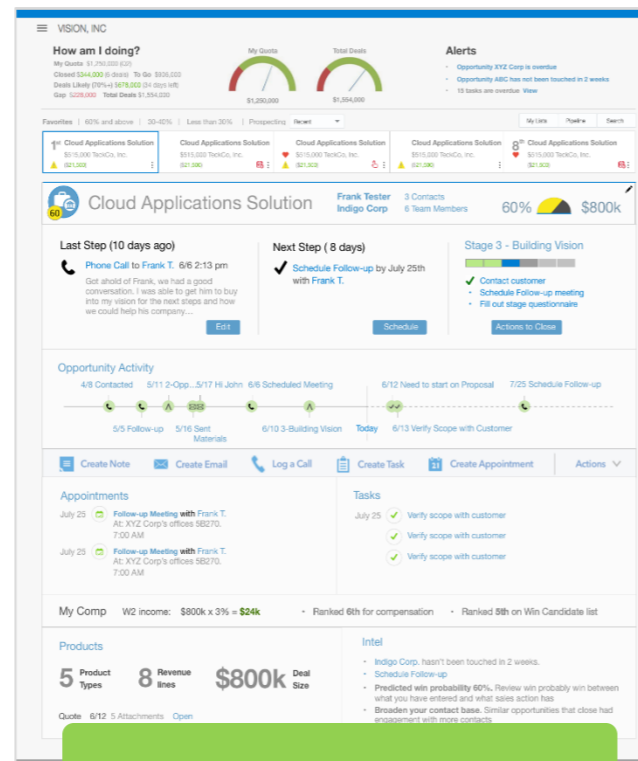


Now we start seeing page entities emerge

Wireframes

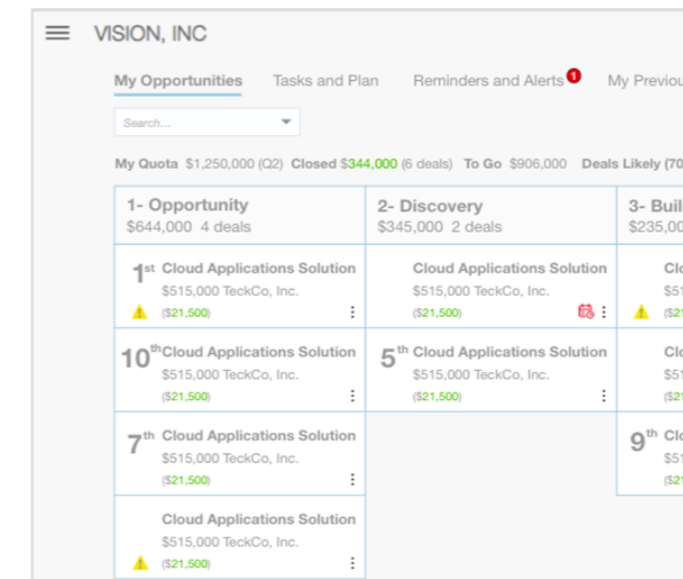
- 1: Problem & Process
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Home Page



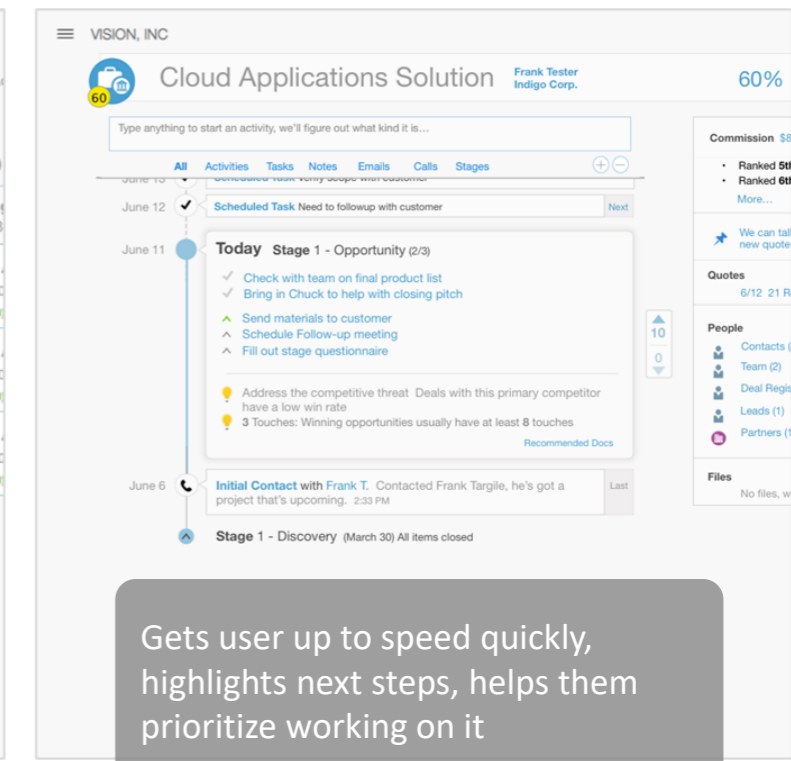
Surfaces critical opportunities in a fast-switch interaction mechanism

Pipeline (Kanban)

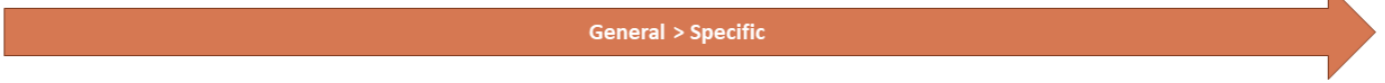


All Opportunities but highlights changed, recommended, critical, and stalled (Filter for favorites or other dimensions)

Detailed Opportunity



Gets user up to speed quickly, highlights next steps, helps them prioritize working on it



New Home Page Concept

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

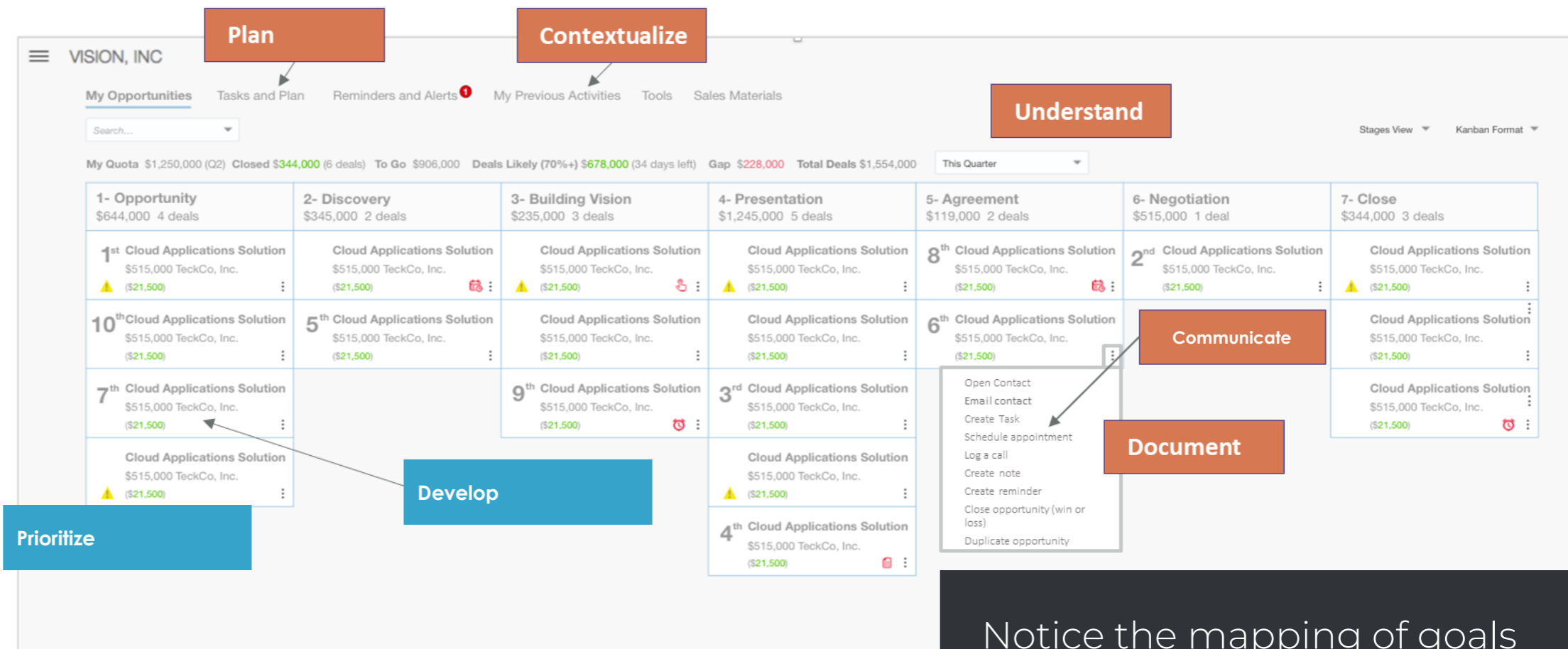
Everything to get up to speed on this opportunity can be seen in seconds

The screenshot displays a CRM interface for 'VISION, INC'. At the top, it shows performance metrics: 'How am I doing?' with 'My Quota' at \$1,250,000 (Q2) and 'Total Deals' at \$1,554,000. It also lists 'Closed' deals (\$344,000), 'Deals Likely' (\$678,000), and a 'Gap' of \$228,000. Alerts include 'Opportunity XYZ Corp is overdue', 'Opportunity ABC has not been touched in 2 weeks', and '15 tasks are overdue'. Below this is a list of opportunities, with the first one highlighted. The detailed view for the 'Cloud Applications Solution' opportunity shows it is 60% complete, valued at \$800k, and managed by Frank Tester at Indigo Corp. The 'Last Step' (10 days ago) was a phone call to Frank T. on 6/6. The 'Next Step' (8 days) is to schedule a follow-up by July 25th. The current stage is 'Stage 3 - Building Vision', with tasks like 'Contact customer', 'Schedule Follow-up meeting', and 'Fill out stage questionnaire'. An 'Opportunity Activity' timeline at the bottom shows a sequence of events from 4/8 to 7/25.

Pipeline Dashboard Wireframe

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
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Pipeline (Kanban) Dashboard



Notice the mapping of goals to the page design. You can see exactly how those goals are being supported.

Oppty Details Concept 1: Timeline

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

VISION, INC

Cloud Applications Solution

Frank Tester Sr. Purchasing Director | 650-989-0090 | ftester@indigo.com
Indigo Corp. Software Services | Chicago, IL
 Status: Open

60% **\$800k**

My Comp W2 income: \$800k x 3% = **\$24k**

- Ranked 5th on Win Candidate list
- Ranked 6th for compensation

Commissions \$169k Total
 \$145k +24k

Quota
 \$1.4M QTD +800k To go: \$1.6M

Quotes 6/12 | 21 Revenue lines | 5 Attachments

People
 Contacts (4)
 Team (2)
 Deal Registrations (1)
 Leads (1)
 Partners (1)

Timeline:

- June 12: **Scheduled Task** Need to start on proposal
- June 11: **My Tasks and Appointments**
 - Check with team on final product list
 - Bring in Chuck to help with closing pitch
 - Stage 3 Tasks** (2 of 3 items still open)
 - Contact customer
 - Schedule Follow-up meeting
 - Fill out stage questionnaire
 - Recommendations**
 - Address the competitive threat: Deals with this primary competitor have a low win rate
 - 3 Touches: Winning opportunities usually have at least 8 touches
- June 6: **Scheduled Meeting** with Frank T. Was able to call Frank, and get his availability for the next steps coming up. 4:55 PM
- May 17: **Customer Response** Hi John, I did get your materials that you sent on May 16th. They look good, I just have a question. 3:44 PM
- May 16: **Sent Materials** to Frank T. Hi Frank, I'm forwarding you some of our promotional literature. Enclosed you will find all of the items that we were talking about 1:05 PM
- May 5: **Change Stage to 3 - Building Vision**
- Stage 2 - Discovery (April 1 to May 5) All items closed
- April 18: **Sent Materials** to Frank T. Hi Frank, I'm forwarding you some of our promotional literature. Enclosed you will find all of the items that we were talking about 1:05 PM

A timeline effectively handles a large set of data in an ordered structure.

Oppty Details Concept 2: Grid Version

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

VISION, INC

Cloud Applications Solution (60)

Frank Tester, Sr. Purchasing Director, 650-989-0090, ftester@indigo.com
Indigo Corp., Chicago, IL, Software Services
 Status: Open, Notes, 60%, \$800k

Next Step (within 8 days) ✓
 Schedule Follow-up by July 25th with Frank T.

Last Step (10 days ago) ☎
 Phone Call to Frank T. 6/6 2:13 pm
 Got ahold of Frank, we had a good conversation. I was able to get him to buy into my vision for the solution. We agreed to move forward.

Stats
 • W2 income: \$800k x 3% = \$24k
 • Ranked 5th on Win Candidate list
 • Ranked 6th for compensation
 Commissions: \$145k / \$169k Total (+24k)
 Quota: \$1.4M QTD +800k To go: \$1.6M

Stage 3 - Building Vision ①
 2 of 3 Items still open
 ✓ Contact customer
 • Schedule Follow-up meeting
 • Fill out stage questionnaire
 Recommended Docs

Tasks and Appointments New Item
 July 25 ✓ Schedule Follow-up Meeting
 June 13 ✓ Scheduled Task Verify scope with customer
 June 12 ✓ Scheduled Task Need to start on proposal

Recommendations Develop
 Address the competitive threat Deals with this primary competitor have a low win rate
 3 Touches: Winning opportunities usually have at least 8 touches

Timeline ③
 June 6 ☎ Scheduled Meeting with Frank T. Was able to call Frank, and get his availability for the next steps
 May 17 ✉ Customer Response Hi John, I did get your materials th 6th. They look good, I just have a question. 3:44 PM
 May 16 ✉ Sent Materials to Frank T. Hi Frank, I'm forwarding you some of our promotional literature. Enclosed you will find all of the items that we were talking about 1:05 PM
 May 5 ☎ Follow-up with Frank T. Called Frank and he agreed to review some of our sales materials.
 April 8 ☎ Initial Contact with Frank T. Contacted Frank Targile, he's got a project that's

People
 Contacts (4)
 Deal Registrations
 Partners (1)

Quotes
 6/12 21 Revenue lines 5 Attachments
 • Router 3827 \$32k
 • Blade Server \$12k
 • Hubs \$4k
 • Switch 296 \$2k

Notice the goal mapping here as well.

Oppty Details Concept 3: Guided

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts**
- 7: Outcomes

VISION, INC

Cloud Applications Solution

\$800k 60% **Stage 3**

Frank Tester
Sr. Purchasing Director

650-989-0090
ftester@indigo.com

Indigo Corp. Software Services
Chicago, IL

Status Open

1 Where It's At

Last Step (10 days ago)

Phone Call to Frank T. 6/6 2:13 pm

Got ahold of Frank, we had a good conversation. I was able to get him to buy into my vision for the solution...

2 What To Do Next

3 What Will Seal the Deal

4 What Else to Know

Next Step (within 8 days)

✓ Schedule Follow-up by July 25th with Frank T.

Schedule Followup

Actions

Tasks and Appointments

- July 11 Meeting with VP Purchasing
- June 13 Scheduled Task Verify scope with customer
- June 12 Scheduled Task Need to start on proposal

New Item

Stage 3 - Building Vision

2 of 3 Items still open

- Contact customer
- ✓ Schedule Follow-up meeting
- Fill out stage questionnaire

Recommended Docs

Things to Address

Address the competitive threat Deals with this primary competitor have a low win rate

How Many Touches

3 Touches: Winning opportunities use at least 8 touches

Stats

- W2 income: \$800k x 3% = **\$24k**
- Ranked **5th** on Win Candidate list
- Ranked **6th** for compensation

Commissions \$169k Total

Quotes

6/12 21 Revenue lines 5 Attachments

- Router 3827 \$32k
- Blade Server \$12k
- Hubs \$4k
- Switch 296 \$2k
- Switch 387 \$2.3k

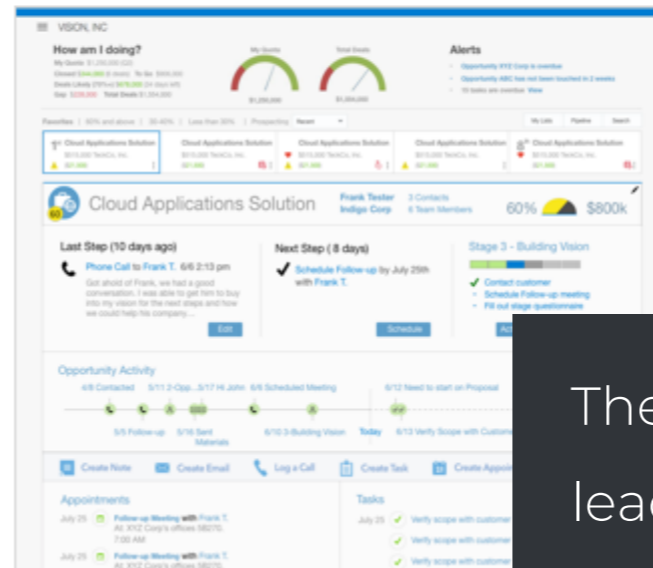
People

- Contacts (4)
- Team (2)
- Deal Registrations (1)

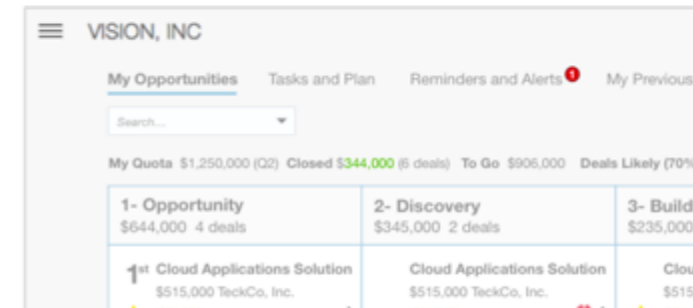
The Guided concept effectively breaks apart the data model into an easily-scanned set of ordered sections.

- 1: Problem & Process
- 2: User Interviews
- 3: Lessons Learned
- 4: Problems and Goals
- 5: Architecture
- 6: Concepts
- 7: Outcomes

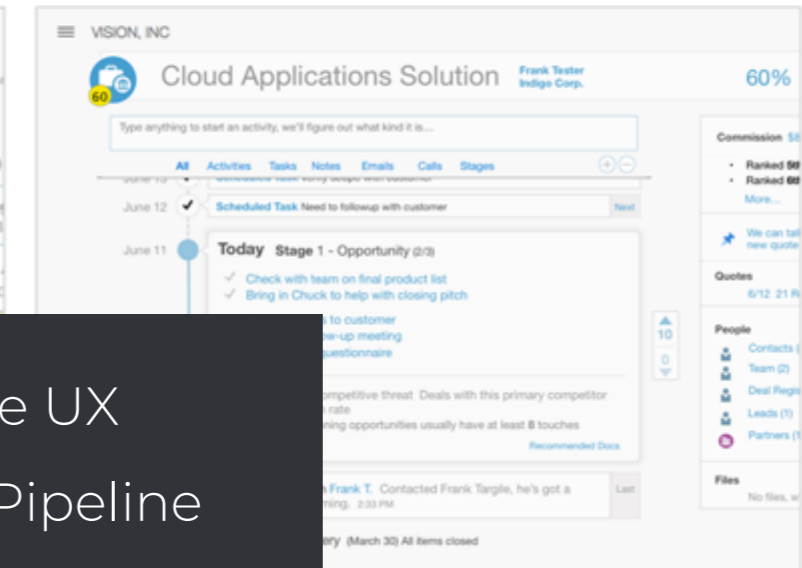
Home Page



Pipeline (Kanban)



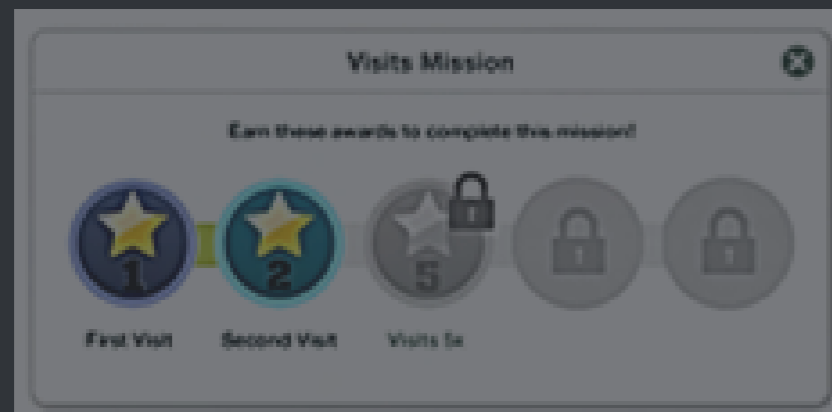
Detailed Opportunity



The project demonstrated to the UX leadership that Field Sales and Pipeline management use cases could and should be incorporated into the larger Sales Cloud product framework.



Badgeville Platform Redesign



About the Company

Badgeville was an enterprise gamification startup dedicated to helping other companies leverage game mechanics to incentivize user behaviors.

Project and Goal

I left Apple to start a UX practice at Badgeville, reporting to the VP of Product Management. The founder and CEO tasked me with leading a 'radical revision' to the level of usability of the product which had not had formal UX design practices applied.

Activities

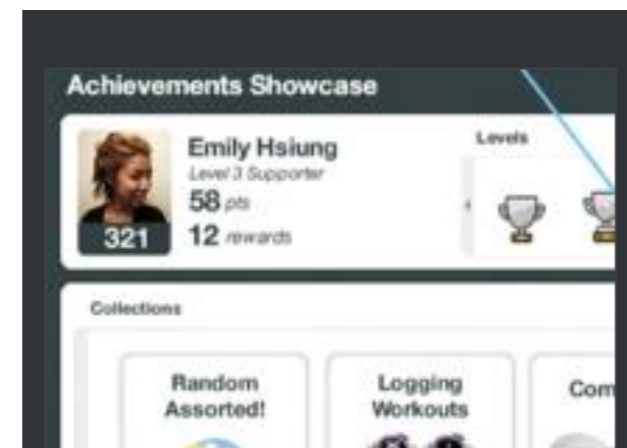
- UX design practices: user research, task flows, wireframes
- Worked extensively with customers to collect needs, tasks, and other inputs
- Redesigned the platform
- Created a new VX design language
- Worked with PMs and Engineers to get the new designs implemented

Goal: 'Radically improve' the usability of the platform

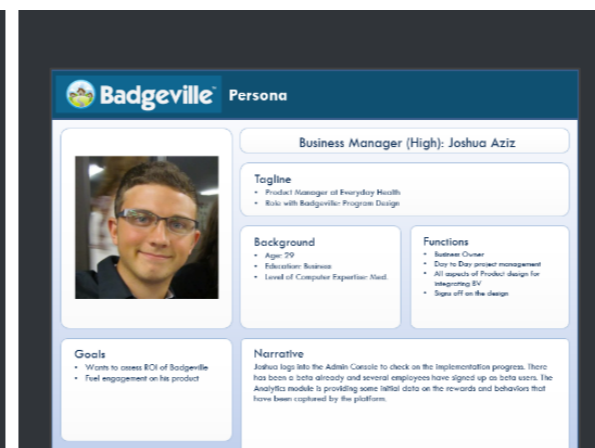
- in a matter of months, because our \$70 million dollar startup is centered on this platform

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns
- 11: Outcomes and Impact

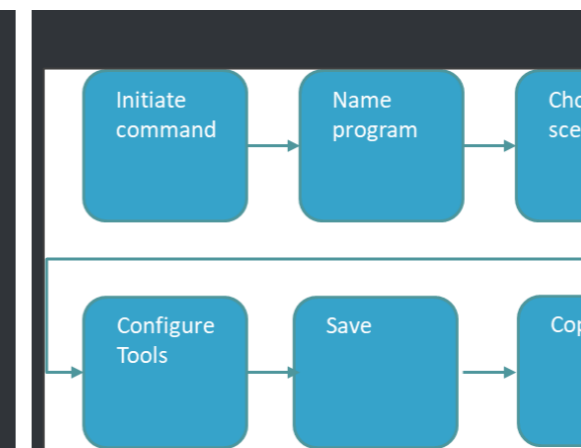
How do we get there?



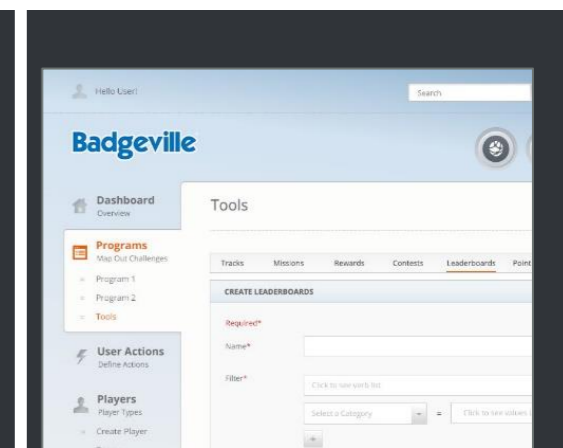
Understand the domain



Empathize with the user



Map key user flows



Propose new UX system

Primary goals for the redesign project

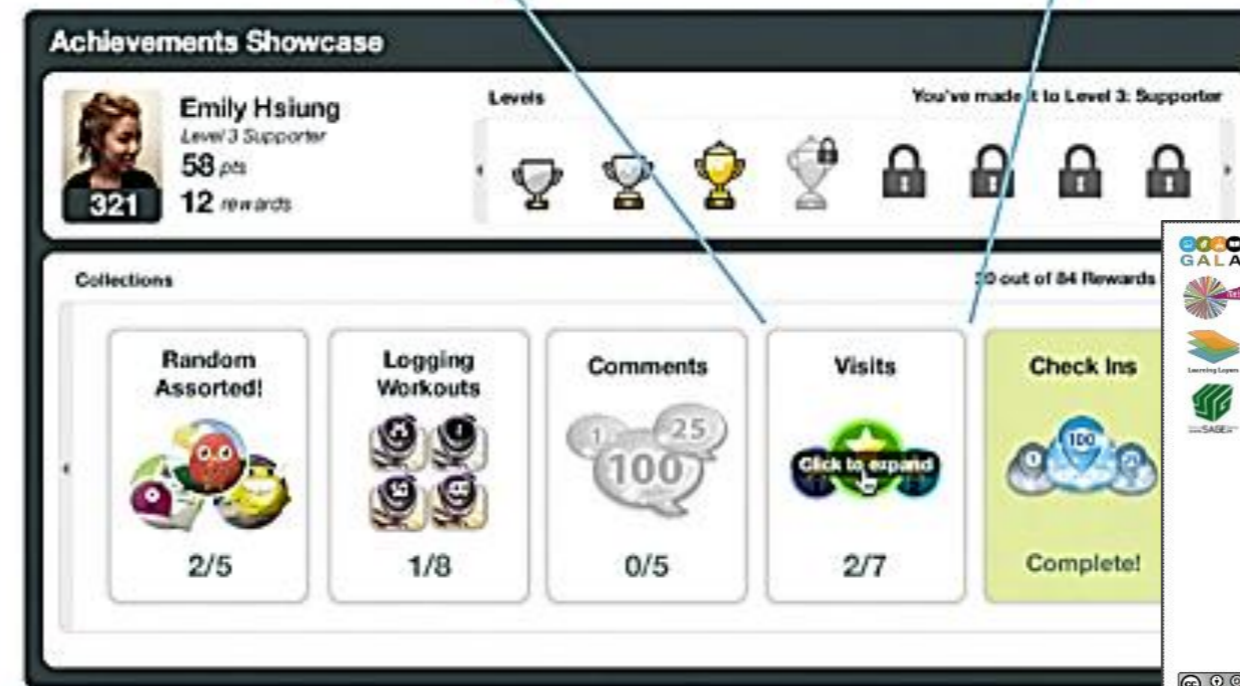
- 1: Problem & Process
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- 4: Task Flows
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- 9: High Fidelity Mocks
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- 11: Outcomes and Impact

- Increase self-service in the product
- Lower campaign producer and support costs
- Re-orient the product from a primarily developer platform to a campaign design & management one.
- Reduce the implementation time by lowering the learning curve
- Create more customer success stories

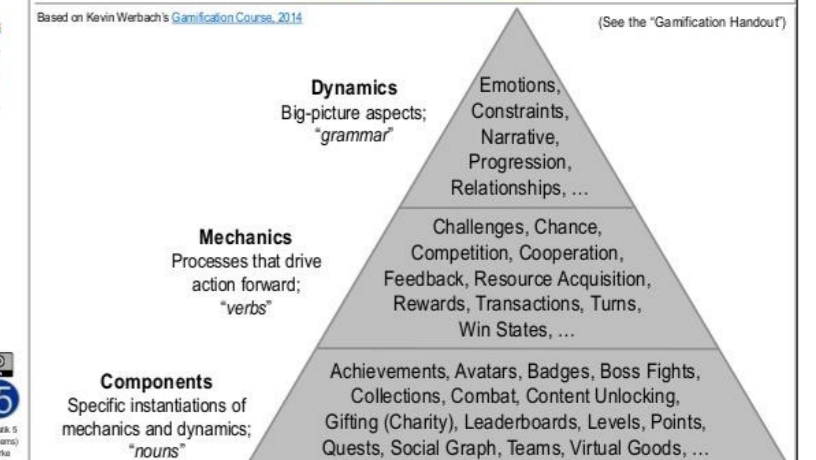
- 1: Problem & Process
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- 3: Personas
- 4: Task Flows
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- 6: Proposal
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Core

Behaviors score points
Non-repeatable Missions set goals
Collect Badges



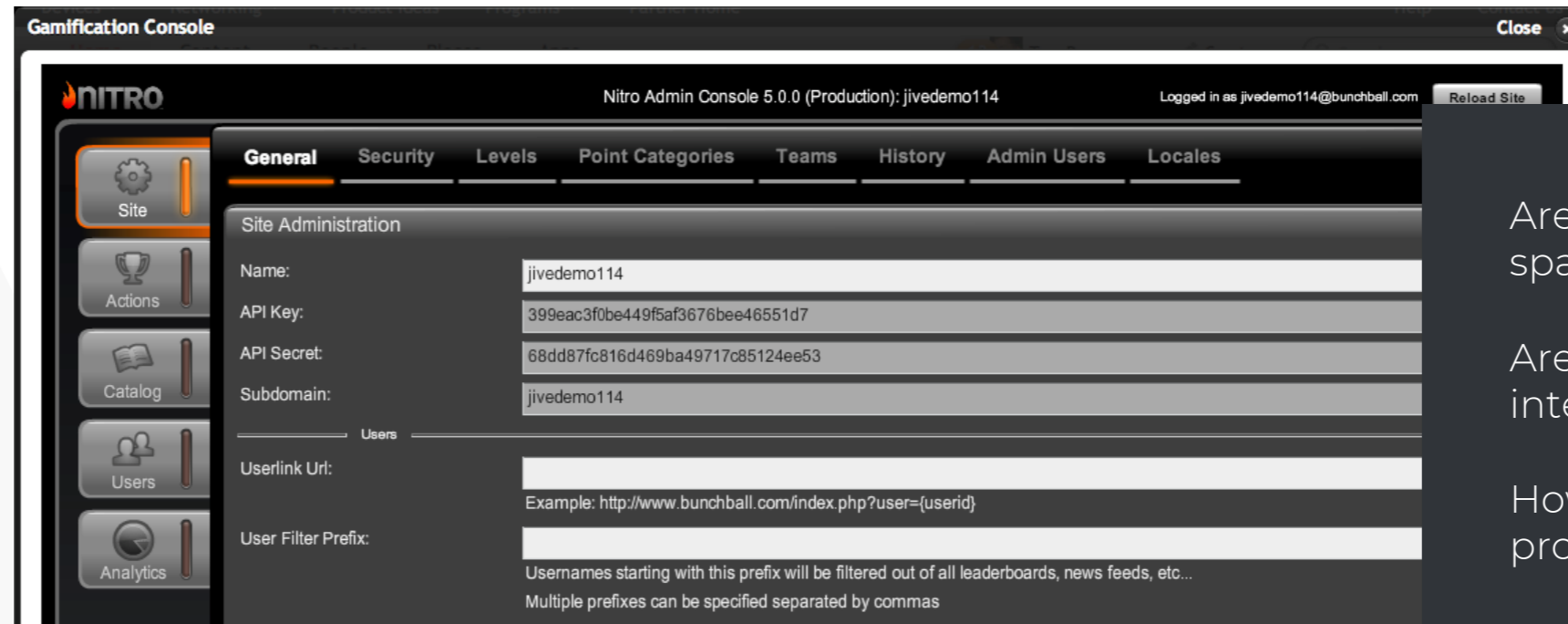
Game Elements Pyramid for Gamification



Competitive Analysis

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns
- 11: Outcomes and Impact

Bunchball Nitro

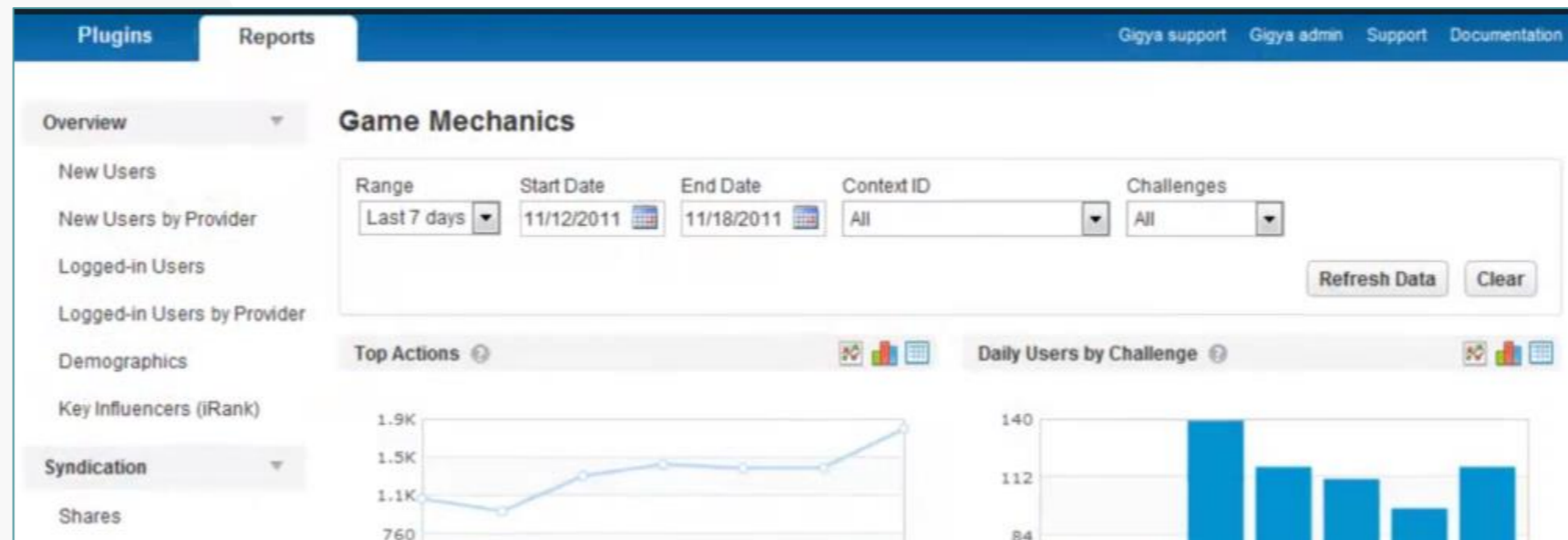


Are there competitors in this space?

Are they doing something interesting?

How are they solving the same problems?

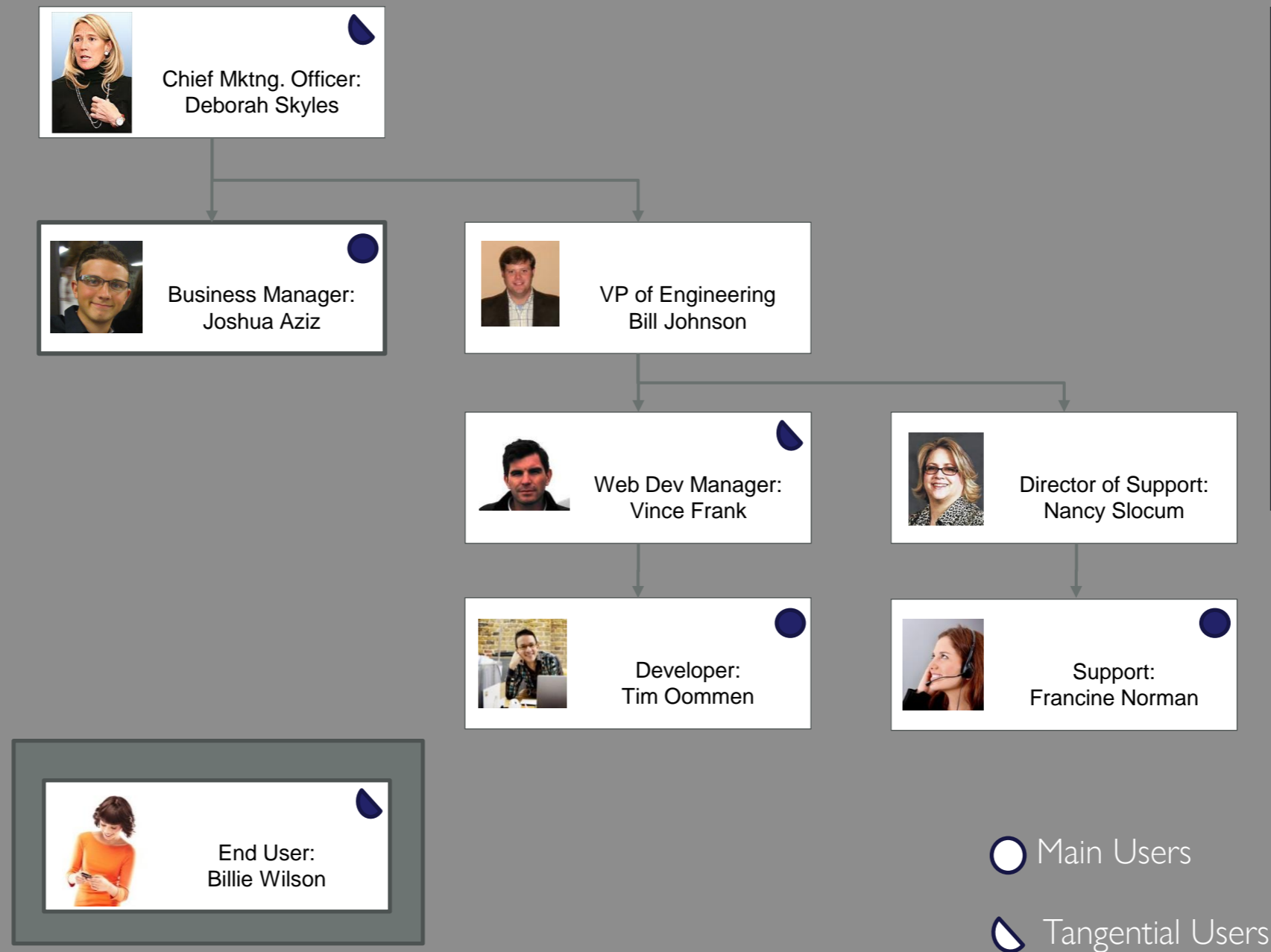
Gigya



Customer Personas and Org Structure

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
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Org structure of EverydayHealth, builder of jillianmichael.com



After working with the VP of Account Management to identify appropriate customers to interview, I built out an org structure to see the relationships between personas.

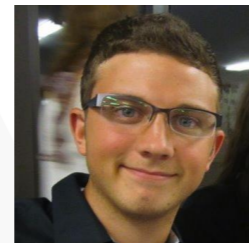
Persona-driven Scenarios

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns
- 11: Outcomes and Impact



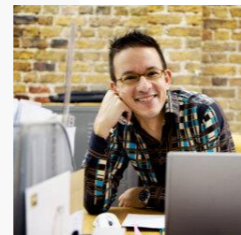
Chief Marketing Officer: Deborah Skyles

- Deborah wants her product or social platform manager to develop a gamification strategy and to get up and running quickly. She needs her product manager to report to her often about effectiveness and ROI.



Business Manager: Joshua Aziz

- Joshua needs a new campaign for Jillian Michaels' site. The goal is to increase retention and need to create a new site in the console.



Developer: Tim Oommen

- Tim gets tasked with making sure that new levels and missions show up correctly in the BV console. He needs to have them show up correctly on the user pages.



Support: Francine Norman

- A customer calls with questions about where their badge went. It turns out that the badge was taken away when a mission was repeated. Francine files a support ticket with Badgeville about the issue.



End User: Billie Jo Wilson

- Billie Jo knows is proud of her Super Shopper badge but it disappeared one day. Feeling annoyed, she called up customer support to ask for it back.

Developing scenarios alongside the identified personas helps contextualize the usage of your product.

Developing Persona Templates

- 1: Problem & Process
- 2: Domain
- 3: Personas**
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
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- 10: Patterns
- 11: Outcomes and Impact

Badgeville Persona

Business Manager (High): Joshua Aziz

Tagline

- Product Manager at Everyday Health
- Role with Badgeville: Program Design

Background

- Age: 29
- Education: Business
- Level of Computer Expertise: Med.

Functions

- Business Owner
- Day to Day project management
- All aspects of Product design for integrating BV
- Signs off on the design

Goals

- Wants to assess ROI of Badgeville
- Fuel engagement on his product

Narrative

Joshua logs into the Admin Console to check on the implementation progress. There has been a beta already and several employees have signed up as beta users. The Analytics module is providing some initial data on the rewards and behaviors that have been captured by the platform.

Frustrations and Pain Points

- BV Admin Console is hard to learn
- Lots of training is involved in learning the system
- Cannot find information when he needs it

Role Description

- Manages the business, product side and some marketing tasks
- Designs the integration strategy
- Have to have data
- Signs off on the design

Product Areas

- Analyze
- Configure
- Manage

Skills

- Technical Skill: 1 to 10 (3)
- Gamification: 1 to 10 (6)

It helped to have real users to build Personas around

Badgeville Usage Stats

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows**
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
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- 10: Patterns
- 11: Outcomes and Impact

Site	Simple Be	Advanced	Levels	Rewards	Advanced	Missions	T
Baseline Configuration (baseline.hsn.net)	0	1	1	1	1	1	
Basic (basic.api.com)	0	1	1	0	1	1	
Beat The GMAT (www.beatthegmat.com)	0	1	0	0	1	0	
Bedsider Production (bedsider.org)	0	1	1	0	1	1	
Best Life (www.thebestlife.com)	0	1	1	1	1	1	
Beyond the Guide (beyondtheguide.com)	1	0	1	1	0	1	
Bill Hennessy Test (hennessygrp.com)	0						
Binekarac SilentMode (binekarac.vw.com.tr)	1						
BlackBook Production Site (blackbookmag.com)	1						
BradsDeals (bradsdeals.com)	1						
Buddy Press KidzVuz (kidzvuz.com)	1						
Buzznet (buzznet.com)	1						
C3 (c3.com)	0						

Pulling data from the system tells us what's being used (or not)

I also worked with internal teams to get insight into customer support issues

Badgeville Pre-Redesign

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns
- 11: Outcomes and Impact

Analyzing tab order reveals that the UI isn't following a realistic usage pattern. Here, there are three tabs that can be grouped together and target a technical persona compared to the Analyze and Manage tabs.

Select	Name ↑ ↓	Point Value	Rate limiting	Count limiting	Hint
<input type="checkbox"/>	Visit	1	No	No	
<input type="checkbox"/>	Bad Choice	-3			
<input type="checkbox"/>	Good Choice	3			

Select	Name ↑ ↓	Point Value	Cooldown	Hint	Hide in Widget
<input type="checkbox"/>	Visit	1	1		Yes
<input type="checkbox"/>	Bad Choice	-3	1		Yes
<input type="checkbox"/>	Good Choice	3	1		Yes

Select	Image	Name ↑ ↓	Verbs ↑ ↓	Message	Active
<input type="checkbox"/>	?	ApontaOfertas	checkin, poi photo, review	Descontos, cupons, oportunidades... Bem-vindo ao ApontaOfertas: todas as compras coletivas em um único lugar! Avalie mais, ganhe mais.	No
<input type="checkbox"/>	?	ThreeRules	deposit, doone, onepersec		Yes
<input type="checkbox"/>	📢	updated	comment	this is my message.	Yes
<input type="checkbox"/>	?	howard's test	checkin, poi photo, review		No

Core User Tasks (Grouped)

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns
- 11: Outcomes and Impact

#1

Design a
game

Create/manage programs

Set up the design

#2

Monitor
Progress

#3

Monitor
Performance
Reports

#4

Analyze
Behaviors

#5

Manage
Players
and Teams

#6

Set up
Networks
and Sites

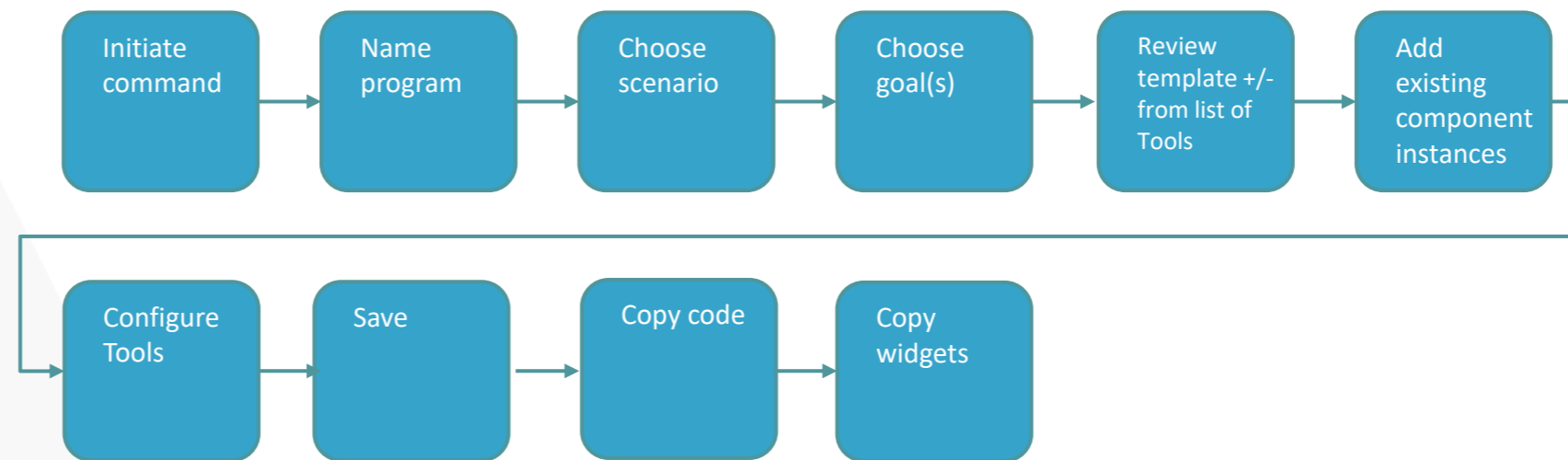
Don't require a developer to put together a gamified campaign. Let a business manager persona take over step #1 by making it much easier to configure.

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows**
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns
- 11: Outcomes and Impact

1. Design Game

A. Create Program

1. Initiate command
2. Name program
3. Choose scenario
4. Choose goal(s)
5. Review template and add/subtract from list of Tools
6. Add existing component instances
7. Configure Tools
8. Save
9. Copy code
10. Copy widgets



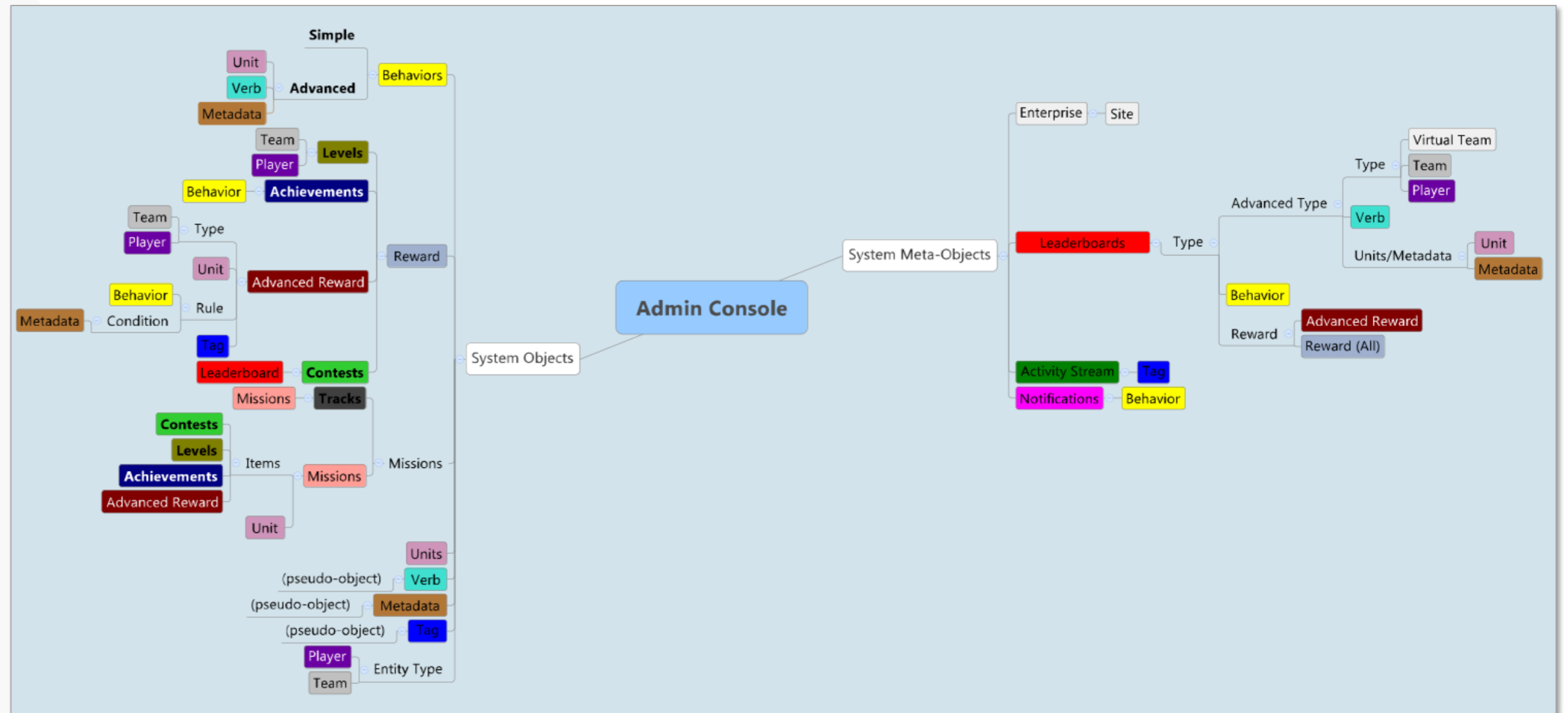
2. Monitor

1. Go to program or to dashboard
2. View the desired set of reports
3. Click on a report to go to full page



Conceptual-mapping of Object Relationships

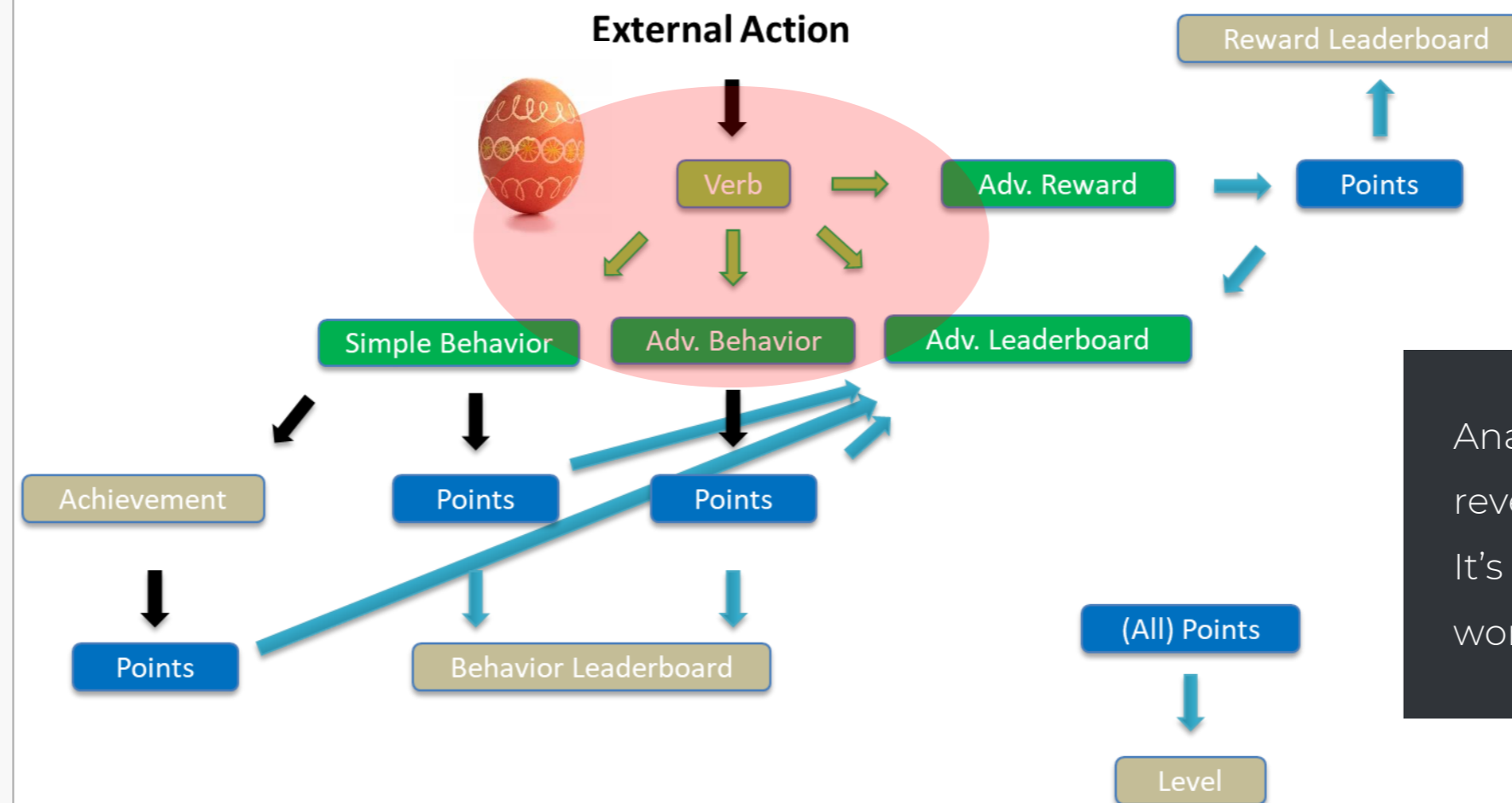
- 1: Problem & Process
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- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
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Mapping out Objects and Data Flows

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
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TRACKING THE FLOW OF VERBS AND POINTS THROUGH THE BADGEVILLE SYSTEM



Analyzing how the system works reveals a key truth:
It's the verbs that underlie the working of major system objects

Simplify and Consolidate

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns
- 11: Outcomes and Impact

Treat all 3 types of behaviors consistently as a singular object (just **Behaviors**)



Treat **Achievements** and **Advanced Rewards** consistently (just **Rewards**)



Deprecate **Levels** in lieu of a Mission type that accomplishes the same goal.



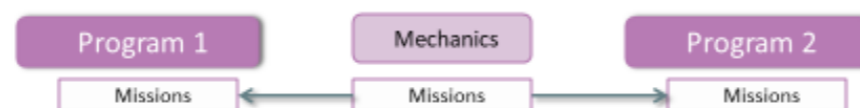
Deprecate Tags in favor of a single Metadata library (use Keys only in place of Tags)



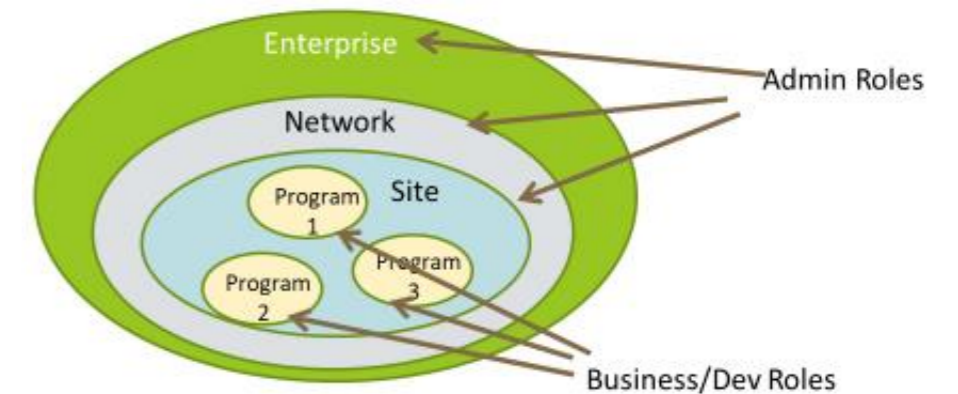
Create new object: **Programs**



Architect the product so that programs can share and reuse common system objects



There were a lot of opportunities to simplify the representation of the system for users. Further, I proposed new UI concepts such as 'Programs' that would make it easier to structure campaigns as well as share and reuse game objects.

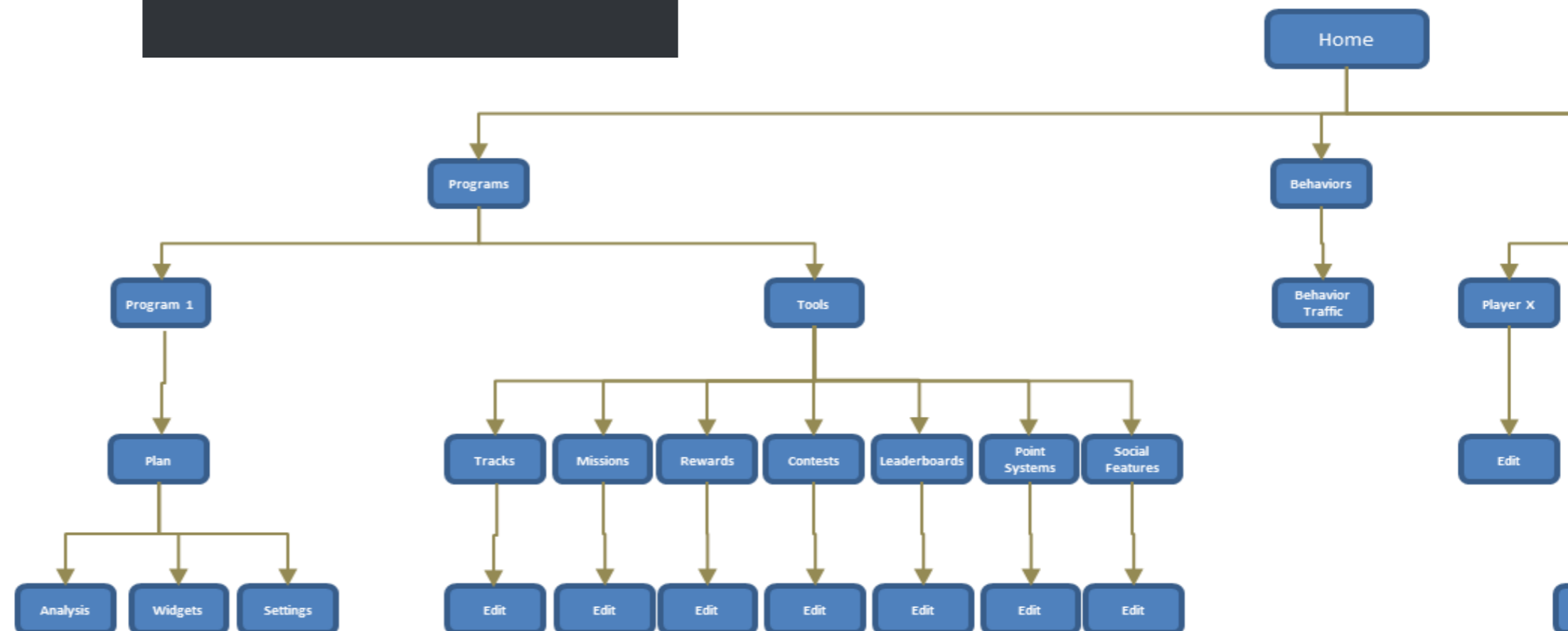


New Information Architecture

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
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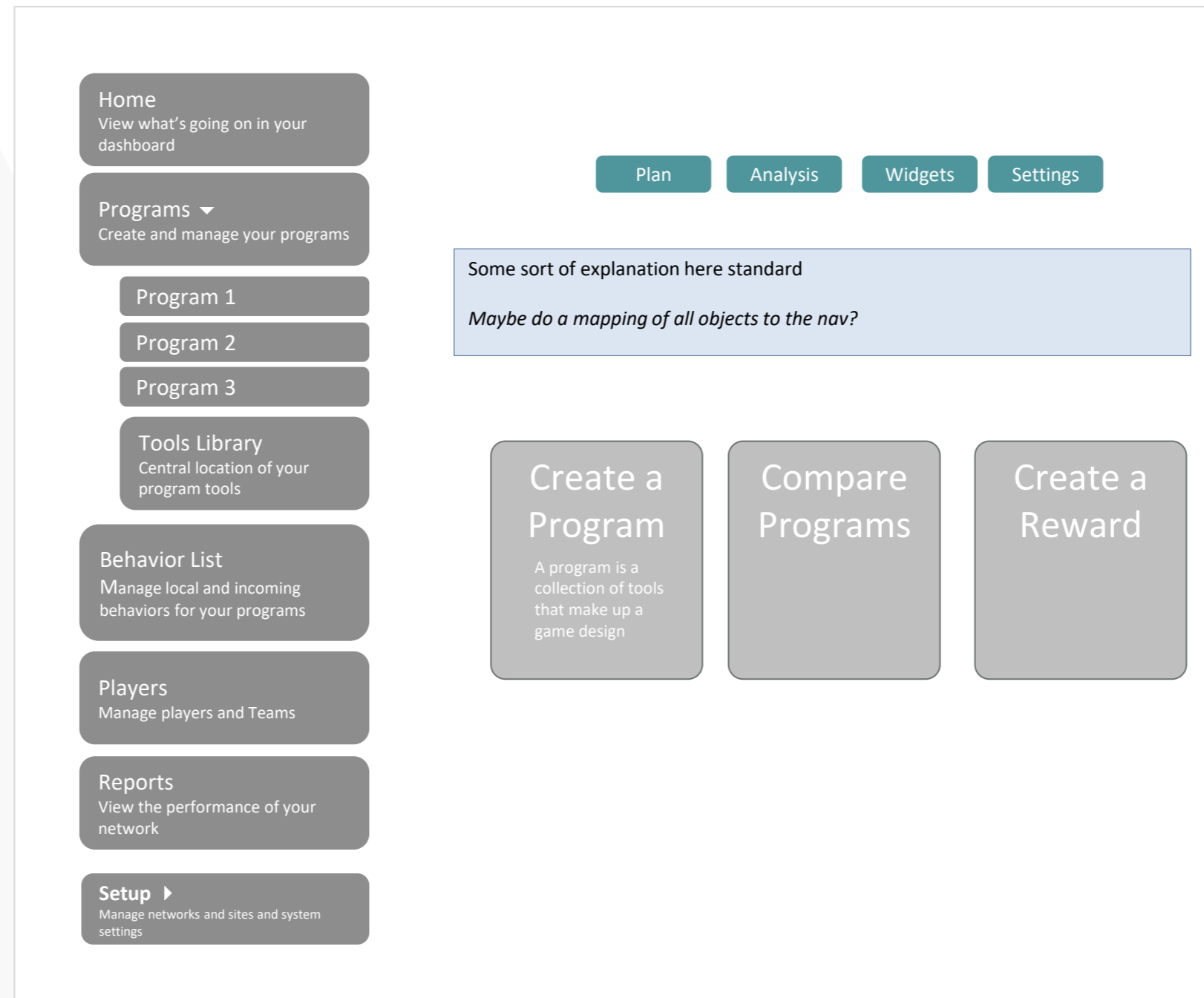
The sitemap allowed us to track and understand how pages in the UX were to be navigated.

Sitemap



Improved Navigational Model

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA**
- 8: Wireframes
- 9: High Fidelity Mocks
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- 11: Outcomes and Impact



Wireframes of the new IA supported the core user needs more simply and directly than before.

Create a Simple Object

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
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Create a Program

Community Sharing Project | Community | Goals: Increase Conversion, Increase social sharing...more

Tracks | Missions | Rewards

Create a new Reward

Create a new Reward Detailed →

Reward 3 |

Behavior	Count
Read	5 +

Points: 12 | Credit: Player

Reward Hint: Enter

Reward Message: Enter

Reward Image: ? Browse

Save | Cancel

I proposed using interaction techniques like direct manipulation to make campaigns easier to configure.

Simplifying Complex Objects

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns
- 11: Outcomes and Impact

Easily scanned structure

Create Advanced Reward

Definition — Define your Reward by naming it and select its type

Name

Active to

Triggers — First select an Action to count, set the count threshold, and then set the criteria by entering categories and values

User Action	Count	Chosen Criteria (each action must meet ALL criteria)
<input type="text" value="Read"/>	<input type="text" value="5"/>	<input type="text" value="Category 1"/> = <input type="text" value="One Value"/>
<input type="button" value="+"/>		<input type="button" value="+"/>
<input type="button" value="+ Add Rule"/> Any Rule will trigger		

Points — Select the number of points to Reward

Points Credit: First player(s) only Other Points

Reward — Give the user a hint and a success message

Reward Hint

Reward Message

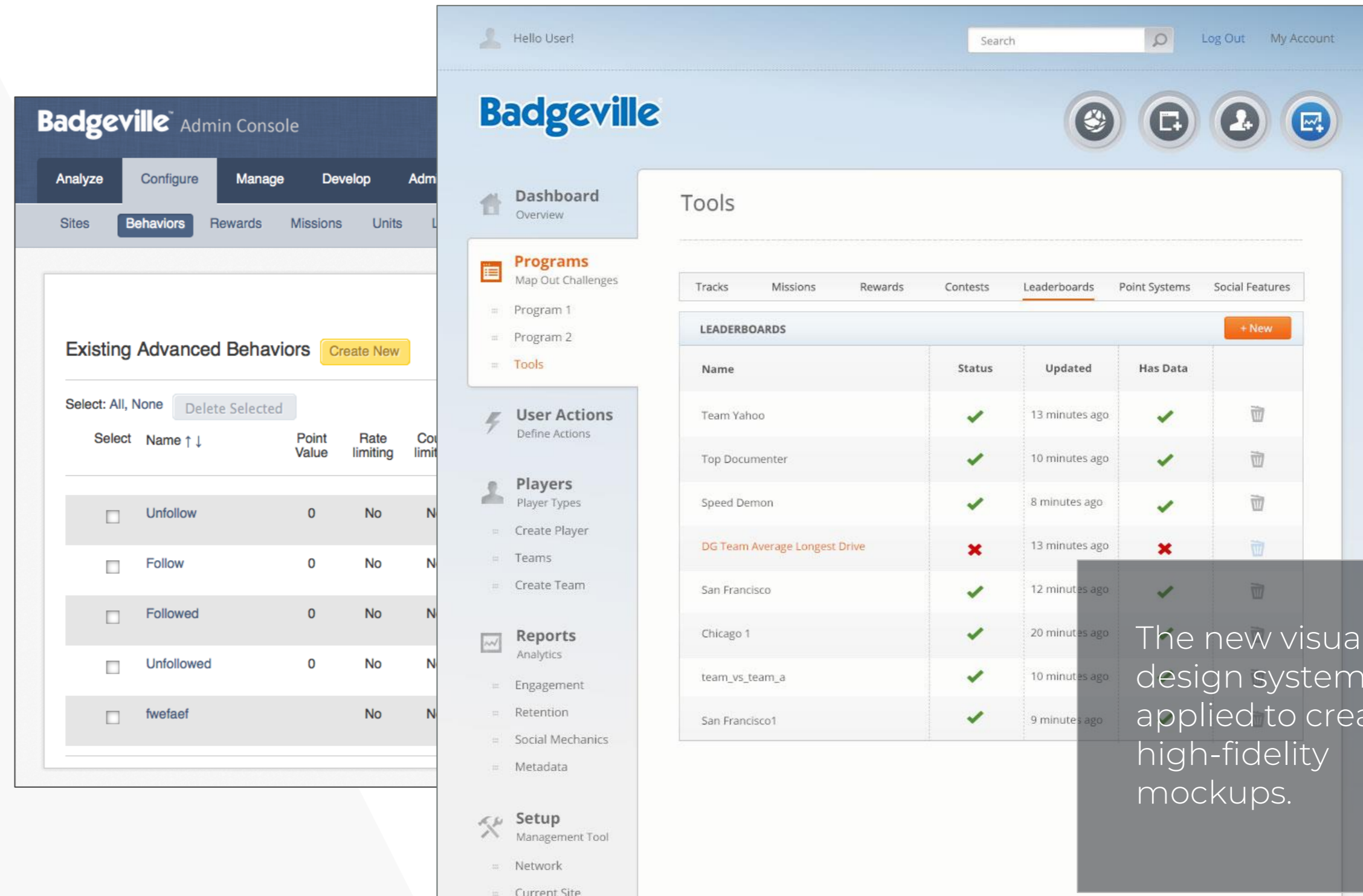
Reward Image

Additional Settings Add more detailed settings like time windows and earnings limits

More complex objects with a deeper data model were improved to be easier to understand by enhancing scannability.

New Visual System

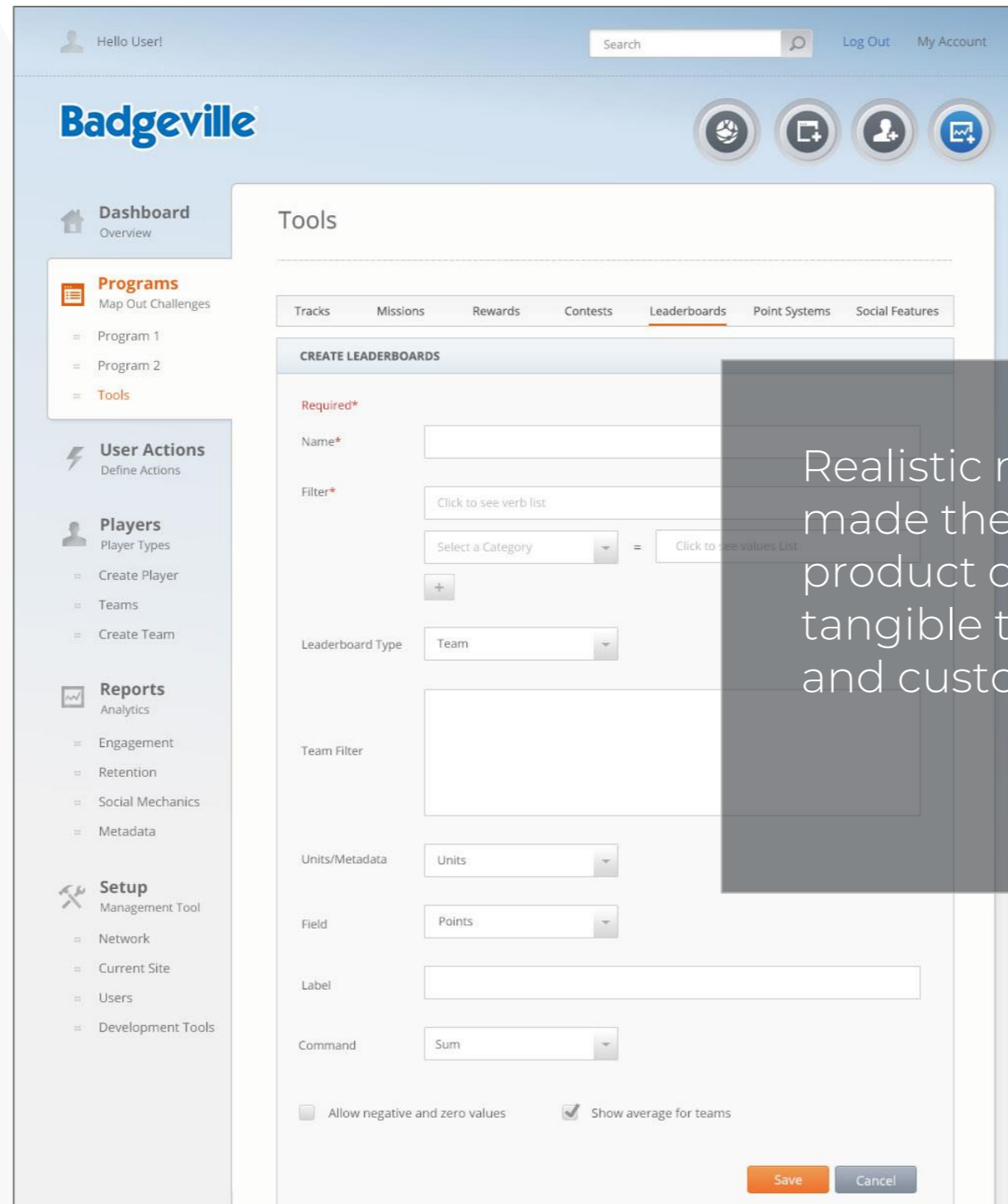
- 1: Problem & Process
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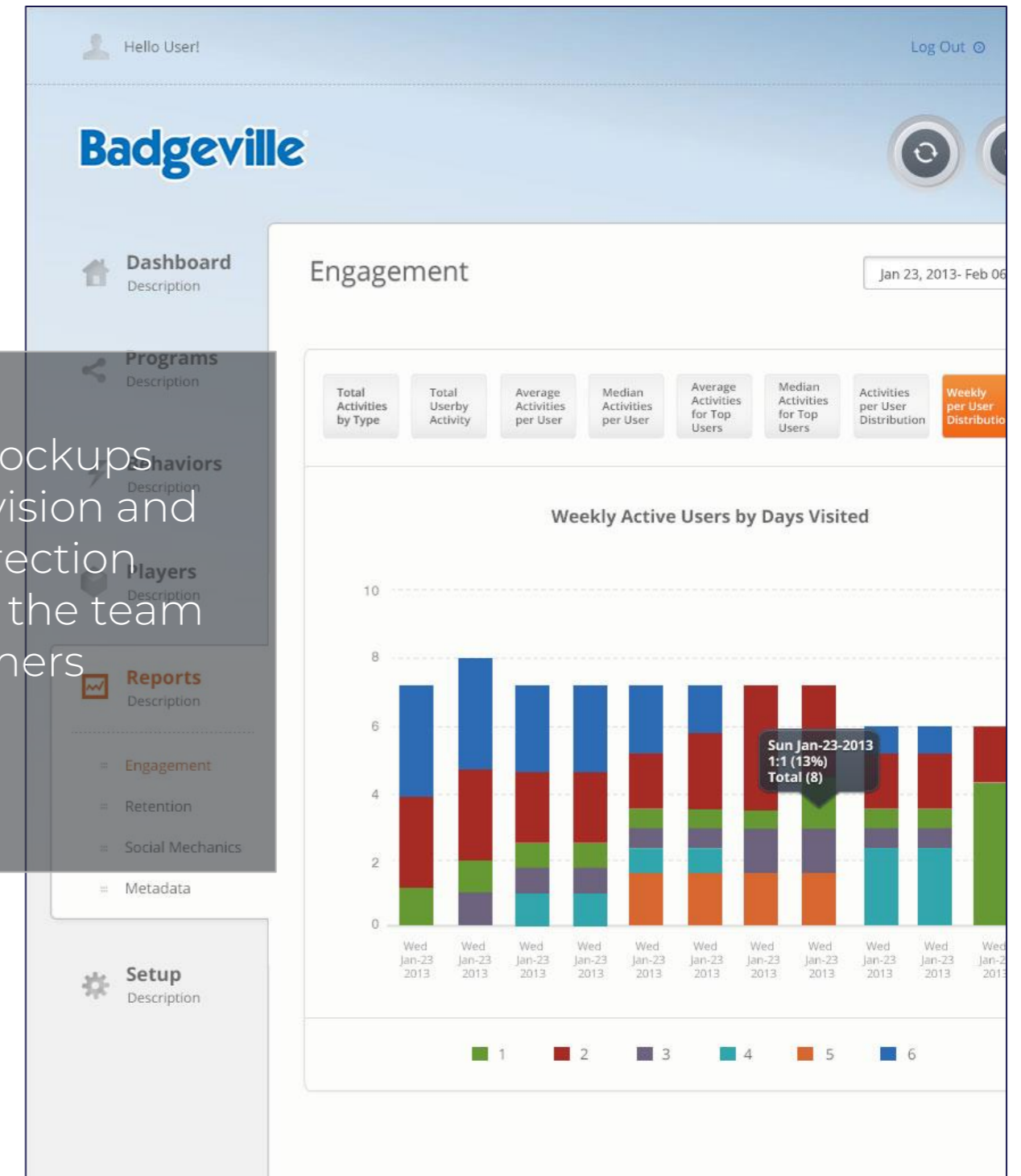
The new visual design system was applied to create high-fidelity mockups.

Benefits of High-Fidelity Mockups

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks**
- 10: Patterns
- 11: Outcomes and Impact



Realistic mockups made the vision and product direction tangible to the team and customers



Patterns Library

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
- 7: Navigation and IA
- 8: Wireframes
- 9: High Fidelity Mocks
- 10: Patterns**
- 11: Outcomes and Impact

The screenshot shows the Badgeville interface with several design patterns highlighted by red boxes and labels:

- Pattern: Auxiliary Links (top navigation bar)
- Pattern: Network & Site UX (top navigation bar)
- Pattern: Universal Search (top navigation bar)
- Pattern: Buttons (Shortcuts) (top navigation bar)
- Pattern: Buttons (Table) (main content area)
- Pattern: Filter Control (Table) (main content area)
- Pattern: Link to object (main content area)
- Pattern: Table Quick Entry (main content area)
- Pattern: Combo box + Auto-suggest (main content area)
- Pattern: Duplicate (main content area)
- Pattern: New (main content area)
- Pattern: Delete (main content area)
- Pattern: Cell + Table text (main content area)
- Pattern: Table (main content area)
- Pattern: Link to object (main content area)
- Pattern: Image Chooser (table) (main content area)
- Pattern: Lefthand Nav (sidebar menu)
- Pattern: 3rd-Level Menu (sidebar menu)

Behaviors (13)

Image	Behavior	Context	Points	Count/Day
	Comment-India	Category = Technology	0	
	Readit	Civilization = Persia	5	24
	Read-Persia	Topic = Fiction	20	24
	Lookwhatidid		25	34
	Last Word	Comment	12	
	Share-Twitter	Service = Facebook	45	45
	Visit	Service = Twitter		
	Went There	Area = Community	10	27

Please list these in the project management google doc on spreadsheet 'Design Patterns':
https://docs.google.com/a/badgeville.com/spreadsheet/ccc?key=0Ao_6IusBxqRMdDBRamwwZnpWMFdQcUx4RTA3WmdDVkE#gid=1

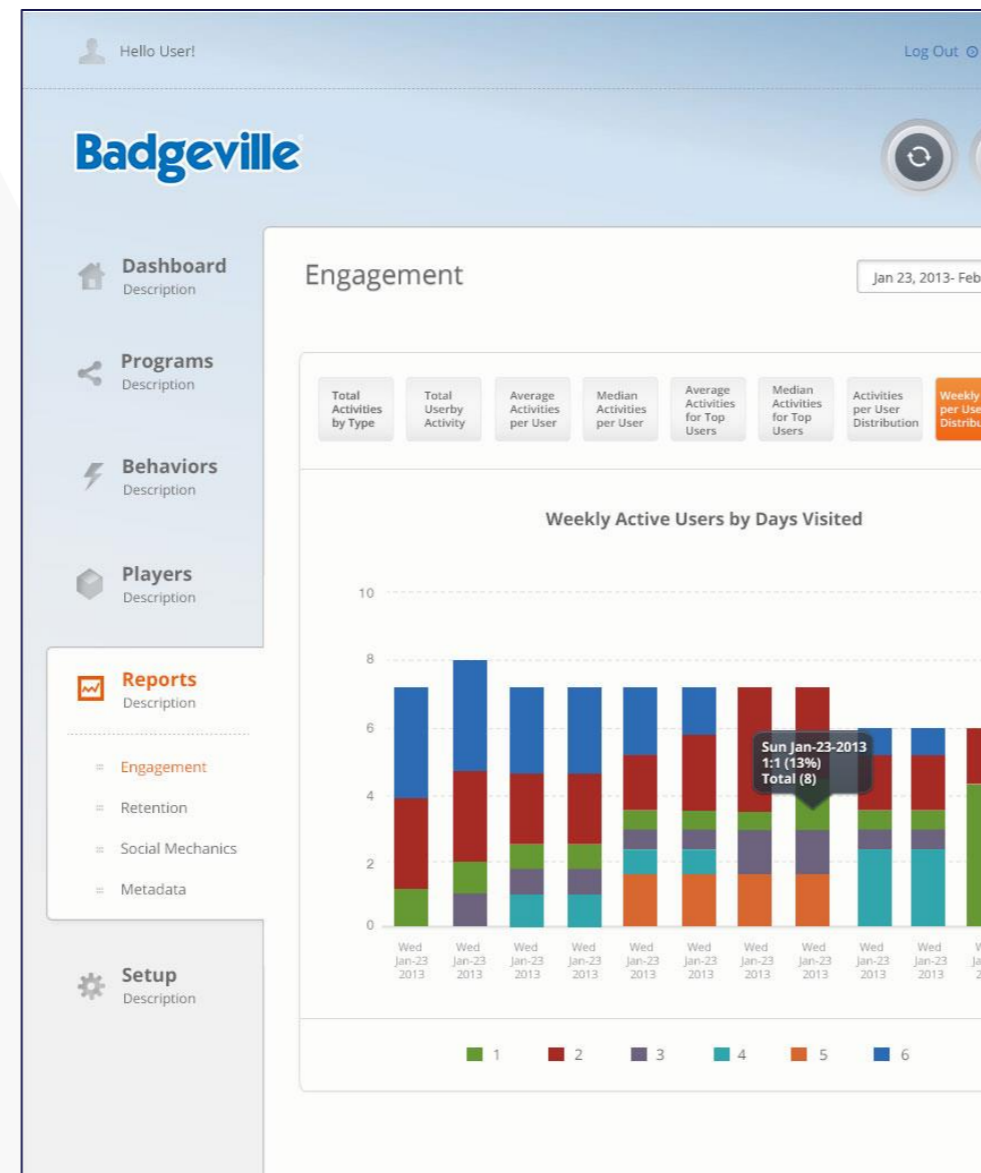
Each pattern needs a Unique Confluence page – some patterns can be grouped together like buttons, etc

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In addition to delivering UI specs, I designated patterns for a pattern library which would make it more efficient to build the product by enhancing reusability.

Outcomes and Impact

- 1: Problem & Process
- 2: Domain
- 3: Personas
- 4: Task Flows
- 5: Objects & System
- 6: Proposal
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- 10: Patterns
- 11: Outcomes and Impact**



Customers were excited to see the prototypes which allowed me to collect detailed feedback. The designs were implemented in staggered releases.

Outcomes and Impact

- 1: Problem & Process
- 2: Domain
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Customers were excited to see the prototypes which allowed me to collect detailed feedback. The designs were implemented in staggered releases.



Designs

Intuit + Yahoo!

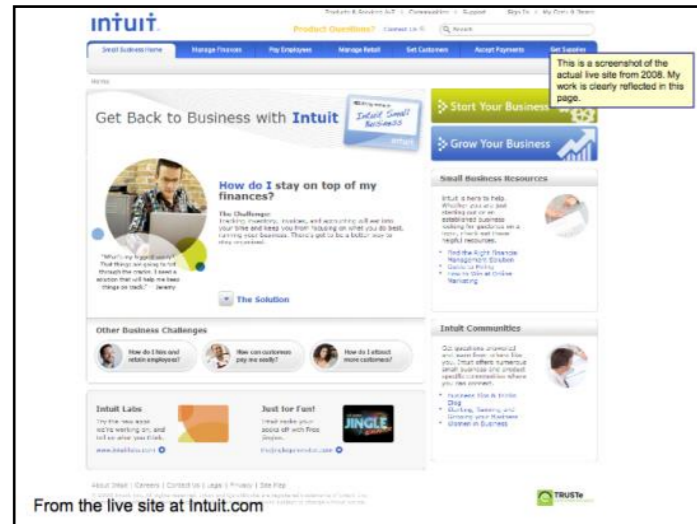
Apple

Dreamworks

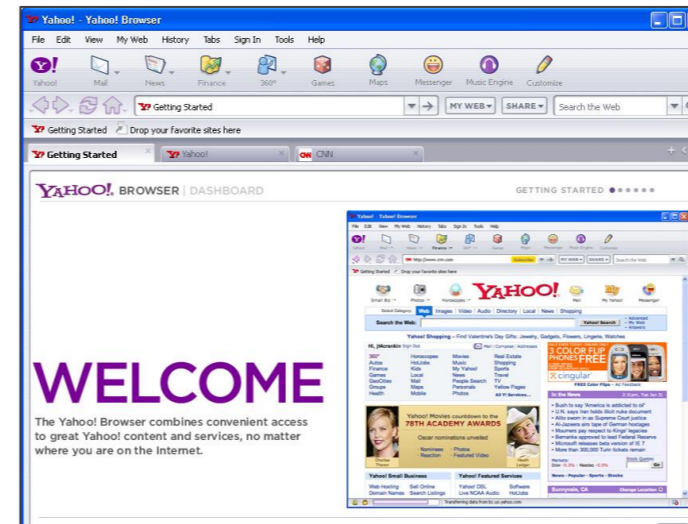
Oracle



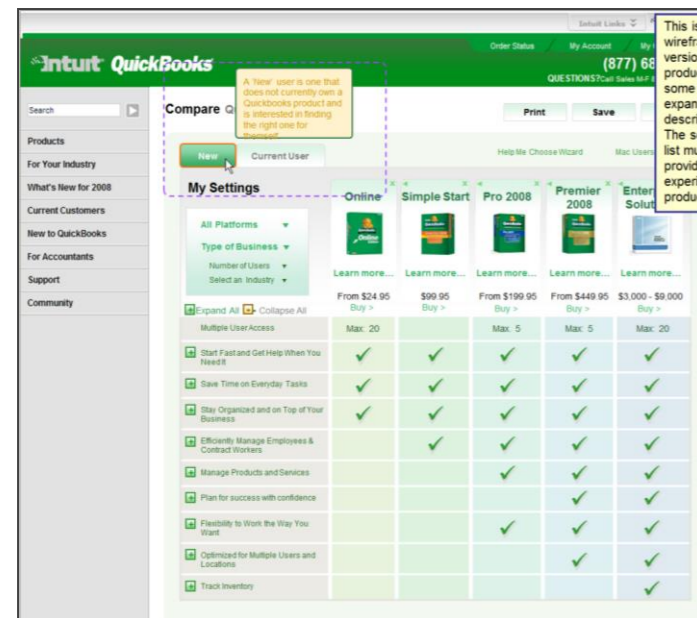
Consumer Design (10 million+ users)



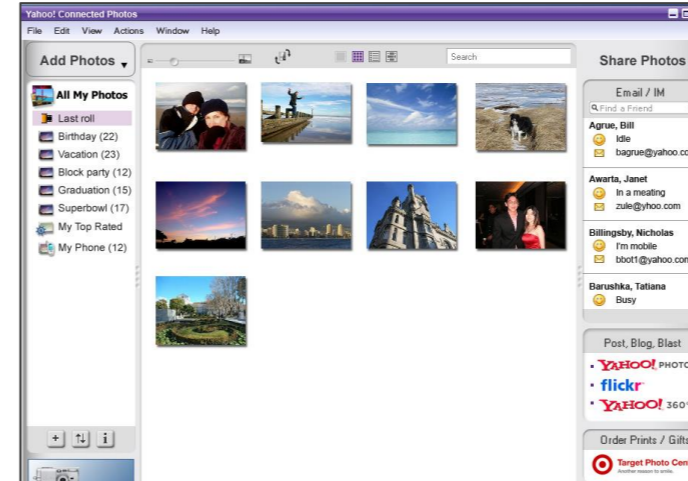
- Intuit.com redesign



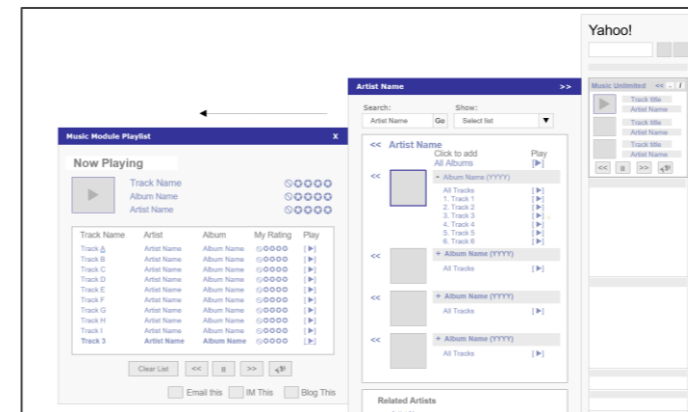
- Yahoo! Social Browser



- Quickbooks Product Chooser
- Quickbooks Online
- Intuit Mortgages



- Yahoo! Photos



- Yahoo! Sidebar



Apple Sales Force Automation

At Apple I helped design a tool for the VP of iPhone/iPad sales and his sales force to manage large account sales and the overall sales lifecycle and process.

In researching this project, I went onsite to Apple stores and conducted contextual inquiries with the Business Sales team.

The screenshot displays the SFA! (Sales Force Automation) interface. On the left is a navigation sidebar with sections for Opportunities, Leads, Companies, Contacts, and Reports. The main area shows a list of leads with columns for Lead Name, Company Name, Rating, Status, Revenue, Contact, Email, and Primary Phone. The selected lead is 'DW Animation Dept.' from 'DreamWorks' with a 'Hot' rating and 'Converted to Opportunity' status. Below the list is a detailed view of this lead, including fields for lead ID, status, description, company, sales rep, estimated close date, territory, web order number, lead source, estimated revenue, and linked opportunity. A 'my comments' section contains placeholder text. At the bottom, there are tabs for 'Contacts', 'Products', and 'Attachments', with the 'Products' tab active, showing a table of product details.

Lead Name	Company Name	Rating	Status	Revenue	Contact	Email	Primary Phone
BA iPods for SPC	Associated Press	Hot	Open	\$125,000	Jane Doe	janedoe@example.com	(408) 555-1212
BA14u	BBC	Warm	Open	\$ 30,128	John Doe	johndoe@example.com	(800) 888-8888
DK iMac	Chevron	Cold	Rejected	\$ 19,108	Dee Light	d.light@example.com	(650) 123-5678
DW Animation Dept.	DreamWorks	Hot	Converted to Opportunity	\$ 7,608	Doe Deer	d.deer@example.com	(555) 121-5689

DW Animation Dept. Last modified by: Philip J. Fry on 03/24/2011 10:30AM

lead ID: 987654321 status: Open description: New calendar year order for animation department.
company: [DreamWorks](#) type: Inquiry
sales rep: [Doe Deer](#) rating: Hot

estimated close date: Jan 21, 2012 lead source: Apple Academy
territory: TH1157 estimated revenue: \$7,608
web order number: W24680 linked opportunity: [Animation Dept. New CY](#)

my comments:
- Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Phasellus viverra ultrices tristique.
- Nunc vitae lacus dui.

Category	Group	Description	MPN	Quantity	Unit Price
Apple Hardware	iPad	iPad Wi-Fi 16GB	MB292LL/A	1	\$ 499.00
Apple Hardware	iPod	iPod classic 160GB - Silver	MC293LL/A	1	\$ 249.00
Apple Hardware	MacBook Pro	MacBook Pro, 15-inch, 2.53GHz Intel Core i5	MC372LL/A	1	\$ 1,849.00

Philip J. Fry Signed In



Apple Sales Force Automation

The team could make custom reports that spoke to trends and analysis of the sales cycle.

SFA!

- Opportunities
 - Current Quarter
 - Recently Viewed
 - Past Due
 - Jim's Pipeline
- Leads
 - My Leads
 - AOS Leads
 - Marketing Leads
 - Greater than \$10K
 - Under 1 week old
- Companies
 - Recently Viewed
 - Tied to My Opps
- Contacts
 - Recently Viewed
 - Tied to My Opps
- Reports

QUICK LINKS

- AccuSearch
- Apple Store Order Browser
- Current Price List
- Education Purchase Agreement...
- Find Your School request
- GCRM

Report Name	Total Companies	Start Date	End Date	Average Revenue	Average CPUs
Pipeline Report - Closed-Won	6	Jan 1, 2010	Dec 31, 2010	\$539,750	136
Pipeline Report - Open	6	Jan 1, 2011	Dec 31, 2011	\$497,198	119

Last modified by: Philip J. Fry on 03/24/2011 10:00:00 AM

Pipeline Report - Closed-Won

CPUs Per Week

Month	CPUs (quantity)	Average
January	120	136
February	130	136
March	140	136
April	130	136
May	140	136
June	150	136
July	140	136
August	150	136
September	100	136
October	140	136
November	100	136
December	100	136

Revenue Per Week

Month	Revenue (\$1000s)	Average
January	500	539.75
February	500	539.75
March	600	539.75
April	500	539.75
May	500	539.75
June	600	539.75
July	400	539.75
August	500	539.75
September	400	539.75
October	600	539.75
November	600	539.75
December	600	539.75

I designed an internal tool for DreamWorks called Media Manager to allow animators and directors to manage the flow of daily animation sequences as movies are being crafted. Media Manager is an interactive platform with large clip object sets.

The screenshot displays the Media Manager interface with the following components:

- Header:** "Media Manager" with "Find" and "Manage" buttons. User information: "Cut: Feature Published", "Preferences", and "gbrentin".
- Left Panel:** "Select a media object" with a search bar containing "t49" and a "+" button. A list of media objects including "mind", "My sequences", "Lighting", and various "mind:sq" entries.
- Details Panel:** "Details for mind:sq:99:s11.1:t49".

Production:	Mind	History	Status
Sequence:	sq200	Date	Created
Shot:	s11.1	05/08/10 4:52pm	Published
Take:	49	05/19/10 1:02pm	Notes
Dept.:	Lighting	05/20/10 4:55pm	
Length:	45 seconds		
Status:	Reviewed		
- Right Panel:** "Status: Latest" and "Tags & Metadata" section with tags like "Lighting", "Monster", "Plot Climax", "Effect", "Confrontation", and "Fight Scene".
- Key-Value Pairs:** Director: John Kensington, Relates to: Crowd FX, Help from: Permesh Jawaris, Random: Worked on this for 3 days.
- Video Player:** A 3D rendered scene with a large play button overlay. Below the player, it shows "mind:sq150:s7.1:light", "T49", "High", "L+R", and "r1".
- Bottom Bar:** "Preview", "Play", and "Send to" buttons.
- Footer:** "Manage playlists here".



Sales Cloud Opportunity Modernization

Edit Opportunity: OpptyWSf3731416788: Summary

Finance Org Upgrades Desktop & Laptops & Tablets | \$144,000 | 80% | **John Hasse Ignite Technologies** | 415-888-5555 | john@it.com

Close Date: October 18, 2018 | Status: Open | Owner: Fred Barnes | Last: 5 days ago

Stage: Qualification > Discovery > **Presentation** > Agreement > Negotiation > Close

Actions: Create Note | Create Appointment | Create Call Report | Create Task

Notes:

- Phone Call TO Mel C We'll need to talk over the various options for the proposal (Dec overdue)
- Meet with John Brandeis We'll need to talk over the various options for the proposal
- Meet with Mel C We'll need to talk over the various options for the proposal
- Schedule a bulk email

Upcoming:

- Phone Call TO Mel C We'll need to talk over the various options for the proposal (Dec overdue)
- Meet with John Brandeis We'll need to talk over the various options for the proposal
- Meet with Mel C We'll need to talk over the various options for the proposal
- Schedule a bulk email

Products:

Type	Name	Quantity	Estimated Price	Amount	Sales Credit
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)

Finance Org Upgrades Desktop & Laptops & Tablets

Owner: Fred Barnes | Primary Contact: John Hasse | Email: john@it.com | Phone: 415-888-5555

Win Probability: 80% | Amount: 5 years | Close Date: October 18, 2018

Stage: Qualification > Discovery > **Presentation** > Agreement > Negotiation > Close

Presentation Stage:

- Prepare Presentation Documentation (Completed)
- Refine and Present Proposal
- Management meeting with Decision Maker (Dec 15 3:00 PM)
- Engage with Customer Contracts

Recommended Documents:

- Ten Ways to Win the Customer
- Effective Sales Strategies
- Discovering Customer Value

Coach (4):

- Generate a proposal that is very clear and sells your value as it relates to the pain points.

Actions: Create Note | Send Email | Log Call | Create Task

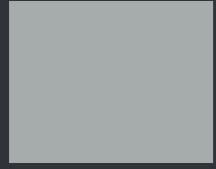
Notes:

- December 4 (2 days ago): Customer Carl sent an email to Frank M.(Me) After looking at a lot of documents, I've determined that...
- December 3 (3 days ago): Pages Viewed: Help > 23422 Variant > What to do when your server is on fire
- Created Opportunity New Server Project
- Email from Julie K: Please see the following information in this article: Help > 23422 Variant > What to do when your server is on fire

Products:

Type	Name	Quantity	Estimated Price	Amount	Sales Credit
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)
Router 45 Family	Router 234782	6	\$45,000	\$185,000	(\$67,000)

I redesigned the Overview page for Sales Opportunities to be richer, more actionable (you can now create notes, send emails etc.) and more structured visually with more curb appeal.



END OF
PRESENTATION