UX for CRM

I. Why CRM and UX come together?

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The key to your customers' world

In the world of modern business CRM is an essential tool to track and measure the company interaction with your customer base.

Endless possibilities to grow your business

The CRM tool may support a variety of activities performed on customer files

- help customers more accurately,
- sell more efficiently,
- target more precisely,
- plan campaigns,
- apply more accurate strategies,
- accommodate products to customers needs,
- assess your employees performance,
- motivate through some internal gamification strategies.

„Because of a social change, the customer seized control of the business ecosystem. We now live in a customer ecosystem…"

Paul Greenbers,
CRM at the Speed of Light (4th edition)

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What is UX, exactly?

It's all about people who want to get things done. Fast. Without obstacles. No manuals required.

Experience shapes attitude

Good user experience stands for an emotion that enhances the continued use of the application. The positive UX empowers users, make them more efficient and confident.

Experience shapes attitude

The strategic goal for user experience is to deliver the right experience to the right user at the right time on the right device. Why? To boost the user's performance.

How much time did it take you to figure out how Google Search works? How many manuals did you read to use Amazon.com?
The CRM may be as intuitive as the examples above.

Intuitive

Human   Flexible   Scannable

Handy   Findable

Simple

Understandable

Release the full potential of your people

What do they do now?

They scroll endless lists and tables. They get flooded with error messages and pop-up's.
They try to read documentation full of technical words. They struggle with never ending forms.

Do they perform at their best?

Do they feel entangled in the data jungle?
Is it easy to explain to new employees how to use the system?
Do they cringe at the very thought of finding something in their present CRM system?
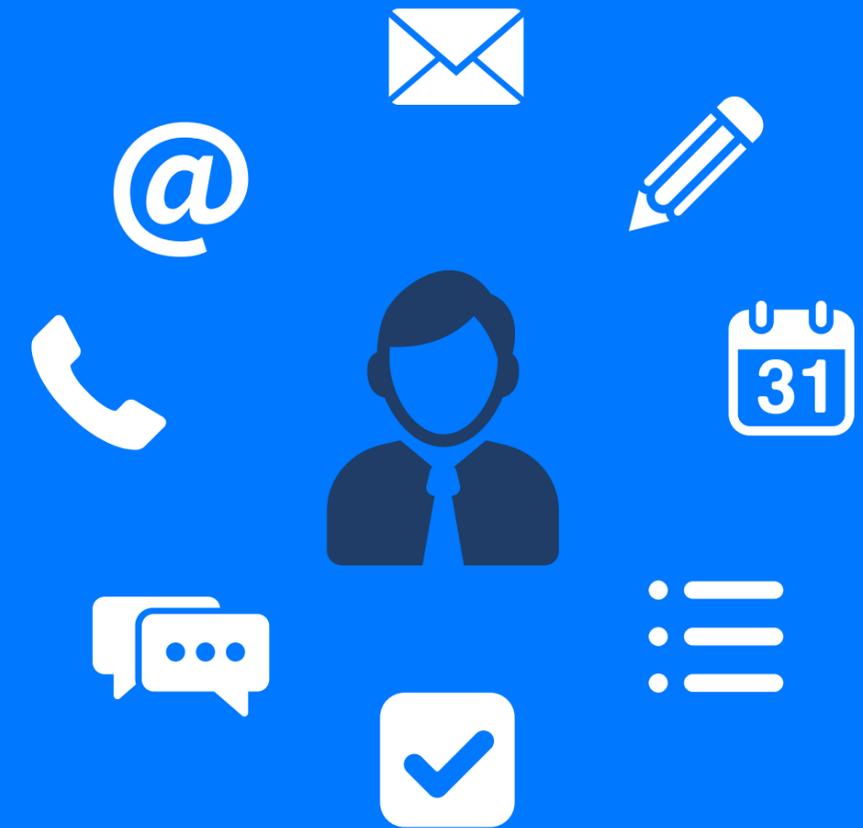
For The Stuff to perform best, their daily tasks should be invisibly supported by the design.
The tool should behave as people expected it. After a while, the application should seem invisible, allowing users to focus only on their goals and targets.

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The role of UX designer

Business growth through design

UX designers see businesses as arenas of complex set of interactions of:

- people,
- their tasks,
- business goals and
- the tools in use.

These ecosystems result in experiences UX designers design, manage, and improve. They spot the possible frictions, disturbances and obstacles that hinders the further development of the business. They find solutions and test them. UX designers are often perceived as problem solvers.

To design experience is to orchestrate the elements that create it.

UX Designer

- **prepares information architecture of the system**

- **finds out how to transpose business goals into user interface,**

- **prepares wireframes of the solution**

- **enables stakeholder design collaboration and communication**

- **makes sure stakeholders' needs and ideas are timely expressed,**

- **ensures that common vision of product is present in the delivered solution.**

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CRM and UX come together

It is to save your money.

It is to save your people's time.

The CRM tool should reflect your values.

UX is key factor in competitiveness.

Optimise your business processes

Well designed system streamlines your workflow and empowers people who use it. Their attitude, efficiency and performance will add up to create the final result for your business. Make your system handy, simple, well-timed and intuitive. The better experience, the more things are getting done.

The better experience, the more things are getting done.

Make it easy to learn!

Makie it logical and intuitive!

Make it comfortable!

Make it searchable and manageable!

Make it understandable!

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The tangible effects and financial payback

- **Performance boost Less time spent on mundane** management tasks, more time for analysis and real value making activities

- **Lower support and help desk costs** Less errors and usability problems, more independent and self-service

- **Reduction of training costs** Less training hours, concise manuals, easier onboarding for new employees

- **Greater application utilisation** To benefit from system change, people have to use it, be enthusiastic and fill it with data. Companies often struggle with CRM software utilization. Less than 25% of their CRM applications capability is actually being used. A positive UX will encourage users to actually use the system

UX creates business value that you can measure.

It is your business and your needs

UX Consultants help you discover
and define the perfect solution.

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II. CRM experience in the making

User-Centered Design

Design methodology

To streamline CRM activities and achieve the best possible experience for the end-users of the CRM, UX Designers apply User-Centered Design methodology. The process starts with requirements gathering and subsequent extensive research phase, that constitute foundationt for the design. Created solution prototypes are tested with users in the evaluation phase to detect the areas for improvement.

It is all about business, people and their tasks

The set of day-to-day activities performed by the employees creates value for the whole organisation. These activities and people are of main interest during the design process. The extensive attention is given to the needs, expectations, mental models and limitations of the people who will actually use the product. UX designers analyse and foresee how the system may be used and then test the validity of their assumptions with actual users.

Requirements gathering

Evaluation
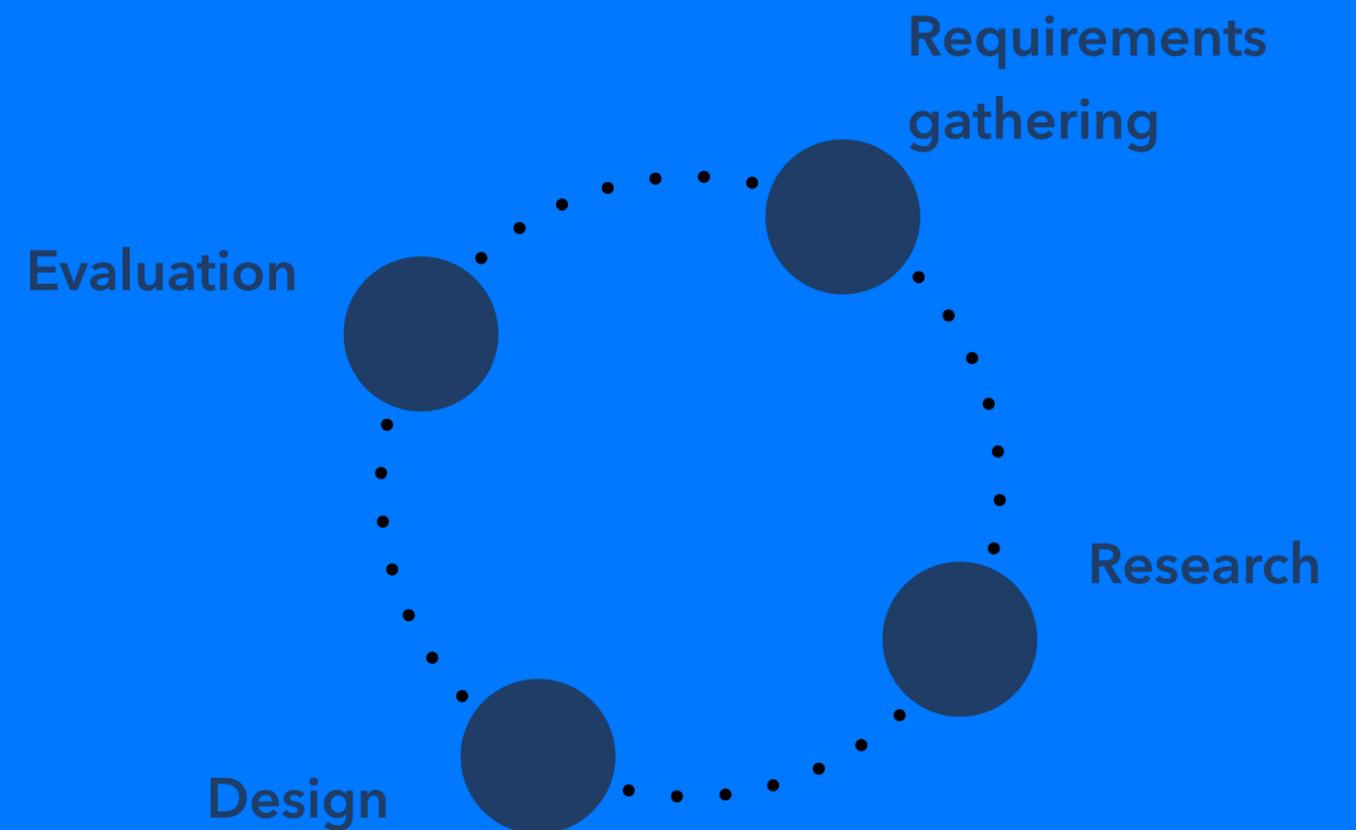
Research

Design

Research: it's all about the business

Understanding client's business

Knowing the vision and strategy of the business is a key element that allows to find, define, understand and solve design problems effectively. UX designers would design to support both: your next steps, as well as long- term strategy. Think long terms: well defined strategy now will benefit in the future many times.

The value of early collaboration

UX designers support stakeholders in the end-users' tasks analysis, brainstorming sessions and reaching the fundamental, root problems to solve. Their active participation in the business analysis workshops is a starting point to design products suitable for the business context and strategy. To define the right solution, one has to understand the problem accurately.

Co-creation

We strongly recommend to invite end users to create the product alongside other specialists responsible for the project. UX designers specialise in co-creation workshops facilitation. Insights gathered during sessions enrich the project with the end-users' perspective from the very beginning, helping to find the right design more quickly and effectively.

What is your mobile strategy?

Multichannel strategy

Modern world became mobile, data are gathered by many devices. Smartphones and tablets are quickly becoming the tool of choice for many sales professionals on the go.
How does it apply to your business model?
Do your employees need fully portable space for their CRM activities?

It is your business that matters, not the device at hand.

There are several crucial factors to take into account while making decision whether to choose responsive layout for your CRM (Responsive Web Design solution) or to develop a mobile native app for tablets and smartphones (e.g. Android, iOS.) UX designers are to help you to make an informed decision. Remember, it is crucial to plan going mobile early in the development process, as the future adjustments costs are always higher.
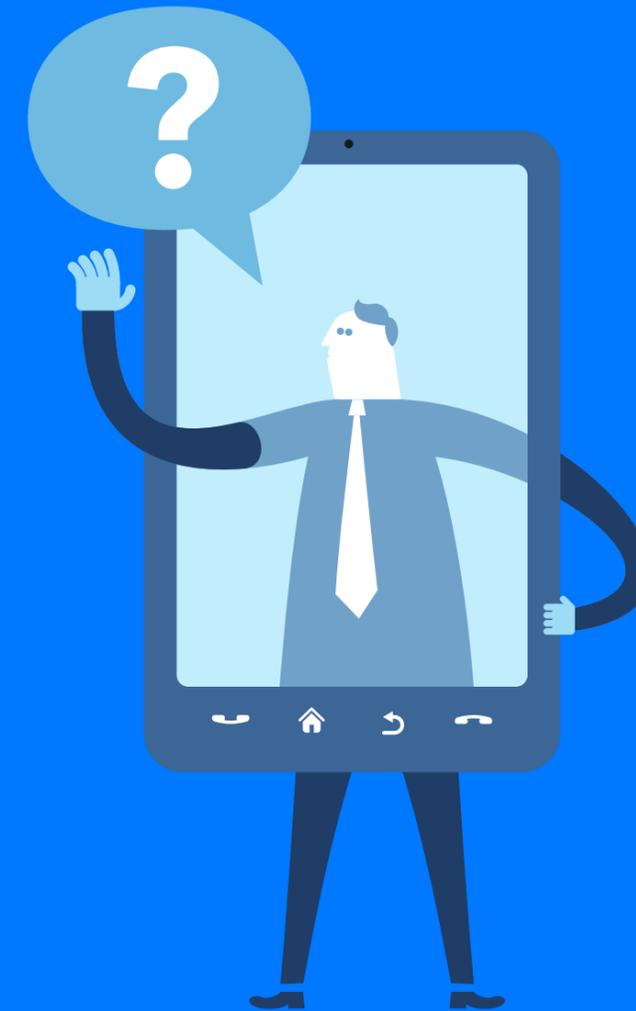
Redesign case

The future began in the past.
Any redesign process requires analysis of the tool currently in use.

The present state

UX designer performs usability audit, cognitive walkthrough and workflow analysis to identify UX problems to solve. Through qualitative and quantitative research, specialist detects the elements that lead to poor user experience.

Define your future

Compare your business goals and long term strategy with the performance of your current CRM application. What hinders you from achieving your goals the most? What elements are effective? What patterns have to be avoided?

UX designer supports stakeholders on the way to the perfect solution for their business.

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Research: who are the users?

Getting to know the users

Understanding user behaviours, motivations and expectations is crucial to achieve a successful user experience. UX designers discover the environment and users' specifics through observation techniques, task analysis, and other feedback methodologies.

UX Research methods in a CRM design process

The methods choice depends on questions UX designer seeks to answer. The problems to address may stem from the specifics of the business workflows, users unique characteristics or technological aspects of the project.

Insights driven by user research enable to design for your context

Who are your users?

What do they do?

How do they work?

Where do they work?

What is their workflow?

Research methods: preview

The research results lay the grounds for the design principles shaping the CRM application for your business context. No matter the method, users behaviour is at the center of attention.

Qualitative User Research

To answer questions about why, what, where, who and when, user behaviour is observed and analysed by UX designer. The tests are organised in the lab environemnt, as well as in users' actual workplace. Methods listed below allow to gather comprehensive set of data on users' mental models, expectations, technical competence, preferences and goals.

Usability Lab Studies, IDI, Cardsorting, Diary Studies, Remote User Studies

Quantitative user research methods

Users' behaviour that can be quantified effectively may be a source of additional knowledge. These methods excell at telling how much time it takes users to fill in a form or how many users fail to perform an assigned task. The analysis of the results has to include a variety of coexisting factors.

Clickstream analysis, clicktracking, surveys, A/B Testing

Persona

As a powerful presentation of research phase findings, UX designers prepare sample portraits of typical CRM users. They present their goals, current behaviors and pain points.

Later in the design process, stakeholders may refer to the personas to support their ideas and validate their design assumptions. Personas help to avoid self-referential design too.

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The final experience curation

Preparing clickable prototypes with software like Axure RP opens the door to a variety of possibilities that help you optimise your schedule and budget.

Graphic design and development

Visual designers put the finishing touches on wireframes and prototypes. It is now up to them to pamper the interface with the visual elegance and fine-tuned color palette. Developers make the experience happen in the realm of code. Creative decisions are still in the making.

Experience curation

The role of the UX designer is not over. As a curator of the final experience, they consult decisions other specialists make. The choice of fonts, applied contrasts (is it legible for those with impaired sight?), default values, notification sequences, data loading times…are they supporting the experience we need to create for the business to grow?

UX designer, the Curator, ensures the high UX quality is delivered.

User Experience results from the set of visual design, well-timed interactions, copywriting…

UX designer orchestrates these elements to make them contribute to the experience business needs.
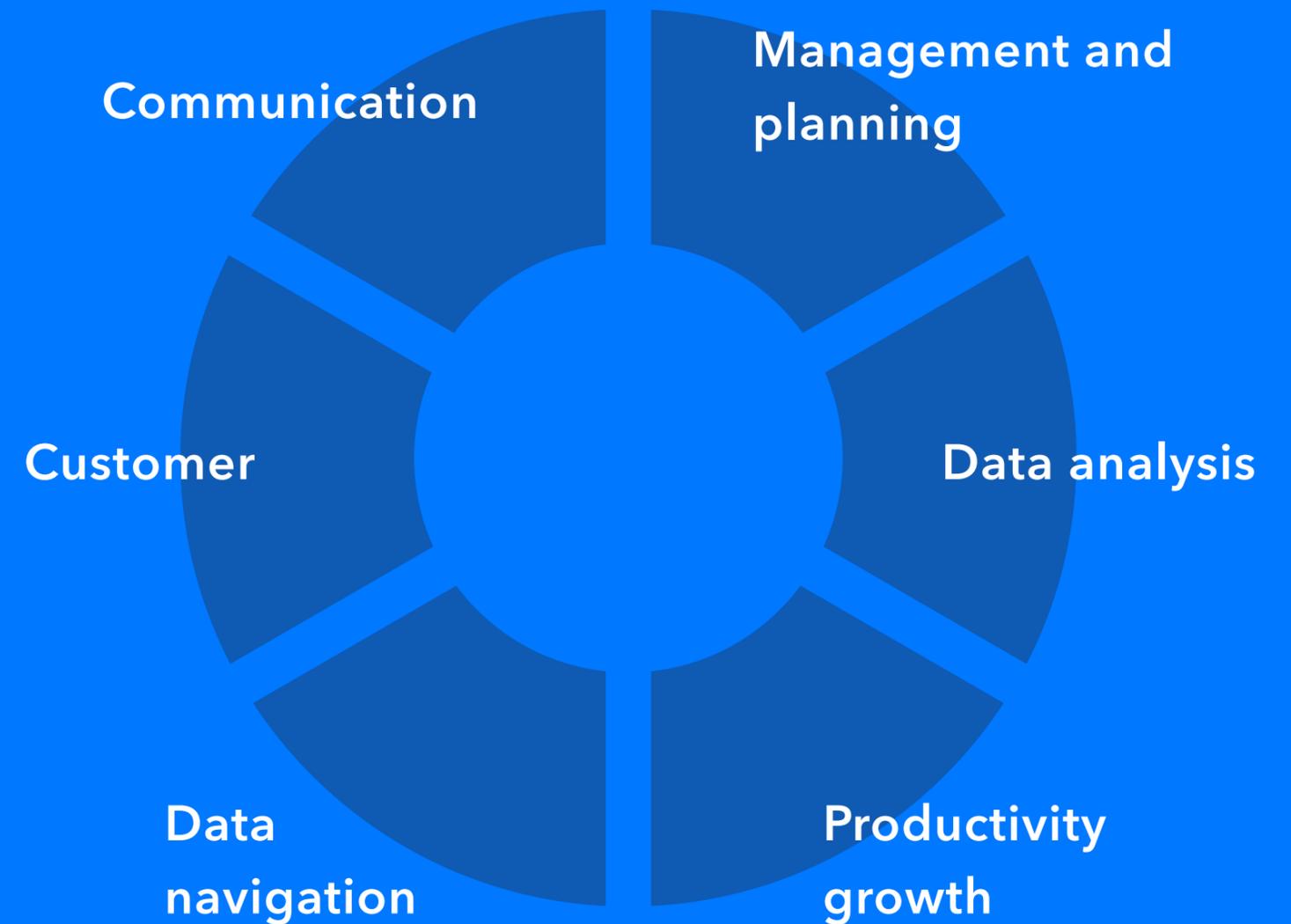
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III. Dedicated space for your business

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Dedicated space for your business

Through carefully conducted preliminary research and needs identification, UX designers define how the tools should work to fully suport the workflow.

The core elements that must be properely designed for the CRM systems are dashboards, navigation features, notifications, activities management & data visualisation .

The design is to reflect business goals and support day-to-day activities of the employees of the company. The proper design enhances your employees performance tremendeously.

Communication

Management and planning

Customer

Data analysis

Data navigation

Productivity growth

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The Customer: the data

The modern business models often perceive The Customer dualistically: as a set of data to organise and analyse and a person to interact with, interested in Value the business offers

Create meaning: organise, present and manage

- How to organise the data logically?
- What data is to be presented together for easy comparison?
- How to make the data easy to scan?
- How to name sections and tabs to help users localise information?

Operationalize: interact with the Customer with business goals in mind

- What should users see at the first glance?
- What information is searched for in the first place?
- What information about client should be at easy reach?
- How to inform users some action on the customer file is needed?

The Customer

Notifications, Alerts and Error Messages

Reality:

The systems has to communicate, send messages and inform users.

The goal:

Making it understandable, less disruptive, more operational. Eliminate pop-up windows flooding the screen!

Do you know a significant part of notifications can be eliminated from the CRM system by the good UI & interaction design?
Those alerts that are supporting users' workflow are to be designed in a human-friendly manner, making things clear rather than causing distress and confusion.

UX designer know the tricks to make all those little interactions less frustrating to help your employees get back on the right track.

Communication

Task management & planning

Depending on business model, scheduling features may lay at the very heart of the CRM application. Contacts with clients, lists of tasks and assignments, control of the workflow – getting things done quickly and easily is a key to productivity

Calendars

Adding events, rescheduling, sending invitations…
Which of those are activities often performed in the company?
How much time do your employees spend managing their schedules?

UX optimisation of these core management features yields impressive results.

Management and planning

Clean design to save your time

Cognitive psychology serves UX in abundance. The science of the human mind lay the foundation for the data visualisation rules.

How do users read long tables? How do they search for patterns?

The right design of long lists, charts and diagrams helps to move through sets of data more efficiently.

Focus on the meaning

How to monitor results and changes with a quick glance?

How to draw attention to the patterns that really matter?

UX designers refer directly to science data to empower users with better CRM reports layouts and visualisations.

Competitiveness starts with knowledge about facts.

The right design leverages the meaning of data.

Data analysis

Dashboard

This is the place where all magic starts.
What information should be presented when users starts their workday? Which parameters should be constantly monitored right from the dashboard? What shortcuts should be placed within easy reach?

Roles in the company

How should users' Dashboards reflect their role in the organisation? What do we consider as of primary importance for each role?

Tasks differentiation is one of the core ideas that shape the company structure. The Dashboard design has to be tailored to the scope of interests of each CRM system user.
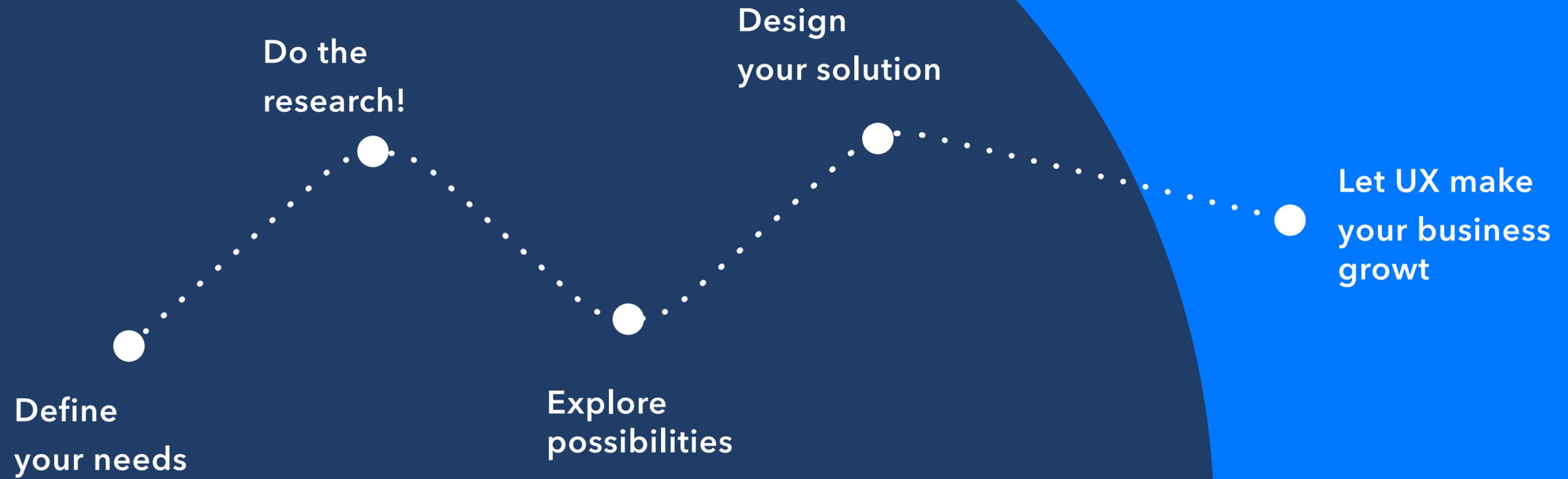
Productivity growth

Navigation

Users in the app move from one place to another. The flow must be reflected by handy and clean menu features. UX Designer will assist you to name the links intuitively, to illustrate them with the right iconography, and most of all group and organise the content to reflect your business strategy and workflows.

Search features

Search boxes design and their localisation, search results page – these are popular starting points for many. Search features design may be of primary importance for your everyday workday with the CRM tool.

Data navigation

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Do the
research!

Design
your solution

Let UX make
your business
growt

Explore
possibilities

Define
your needs

USER EXPERIENCE DESIGN

About Divante

- eBusiness Software House

- Core Technologies: **Magento, OroCRM, PimCore, Cloudera**

- Operating since **2008**

- Over **150 people** at our office in Wroclaw, Poland

- Consulting Office in Rotterdam, Netherlands

- Clients from Europe and the US

- **SCRUM** methodology ensuring high quality and flexible approach to the business requirements

- Case studies:
  divante.co/portfolio

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