Account Planner Homepage Redesign:
Usability Test Findings

July 2014

Research Overview

The study was designed to answer the following research questions:

1. How do users initiate the Account Planning Process?
2. How do users categorize, prioritize, and find the Accounts they are planning?
3. What key criteria and data fields are users referencing?
4. What are key concerns with Account Planner and how does it affect or impact their current workflow?
5. What improvements can be made to improve the users' ability to create and manage plans?

Assumptions

Several Assumptions were made during the Account Planner Homepage Redesign discovery process based on heuristic evaluation and existing user feedback.

1. Excessive fields and filtering options. Users likely use a fraction of the information presented to them on the current screens.
2. Search is the primary function of the users.
    a. Primary search criteria is Account/Dealership name
3. Multiple tables on the screen are cumbersome.
4. Cumbersome and unintuitive navigation on tablet and mobile devices.
5. "Sales Messages" are ignored and not relevant.
6. Discussions had been made regarding editing the close date from the homepage. This concept is not reflected in the redesign.

Participant Overview

Due to the focused nature of the research (i.e. we were looking to answer a handful of *very* specific usability questions), sessions were condensed to 30 minutes. These sessions were split into separate reviews of the existing Account Planner Homepage and the new Account Planner Homepage. Sessions were held with 6 participants who have varying tenures at Cars.com and the following characteristics:

Commonalities

- All users were inside Sales
- All users were familiar with Account Planner
    - All users had experience creating plans for new business
- All users had experience using a tablet device.

Outliers

- Some users had experience creating plans for renewal scenarios, but not all.
- Some users had field sales experience, but not all.

Approach

Each session began with a very brief interview meant to determine the individual, day-to-day usage of Account Planner, existing biases, individual sales and planning processes, and key information deemed absolutely necessary for account planning purposes.

Following the interview, we began an exercise involving the existing Account Planner Homepage. Users were asked to complete a number of tasks related to the account planning process. They were asked to share their thoughts and responses verbally while navigating the screens with their mouse. After completing tasks for the existing Account Planner Homepage, users shared their thoughts on the current experience.

Users were then presented with the new Account Planner Homepage UI in a development environment, using all fake account information. Users were invited to share their initial thoughts and observation, and then were asked to complete similar tasks as before.
After completing the tasks, users were encouraged to share their thoughts on the interface and how it met or did not meet their expectations. If there was any confusion or apprehension, we probed users for additional information regarding what they did expect to see.

Finally, users were presented with iPad for some brief exploration. Users were observed for ergonomic preference, ease of use, and general navigation.

Findings

Research Question	Related Findings
How do users initiate the Account Planning Process?	• Many users indicated that using Account Planner happened late in their sales process, primarily to send a contract to the dealer. • Several users relied on the SF “Accounts” tab and notes section for planning, and then transcribed information into AP. • Many users initiate the process based on engagement and whether or not an account has a plan or does not have a plan.
How do users categorize, prioritize, and find the Accounts they are planning?	• Virtually all users who were tested gravitated toward the search bar to get started with finding the Account. • The majority of users emphasized the need to arrange, sort, or filter by close date. • There were 4 different methods for prioritizing Accounts that were verbalized and demonstrated on both the old and new UI; with or without plans, alphabetical order, close date, and stage. • Almost all users ignored the filter criteria in the Existing Account planner, and all users ignored the filter button the Existing Account Planner.
What key criteria and data fields are users referencing?	• Account Name • Close date • Stage • Most users also have a strong need for accessing and creating notes • Products pitched • Status of the contract ○ Would like to see if the dealer has opened or seen it as part of the status
What are key concerns with Account Planner and how does it affect or impact their current workflow?	• Most users take notes elsewhere and then transcribe the information in Account Planner, which complicated navigation and slows down their process • One user expressed the likelihood of dealers seeing other Accounts on the screen when using it on the lot and a potential need to hide that competitive information

What improvements can be made to improve the users' ability to create and manage plans?	• Strong emphasis on close date recognition and prioritization • Several users indicated the need for taking notes or a log a call feature • Need a clear indicator of action needed (close date approaching, enrollment needed) or if something is high priority • Some method to indicate customer who may be a harder sell on products.
Additional Notes	• Partial cancellations may be a challenge. Users were inclined to create a new plan option for renewal scenarios. If partial cancellation are needed, how will we handle scenarios where users create a new option to override the existing plan?

Usability Issues

- Issue: When users left the new homepage and navigated back, they landed on a default account, instead of the account they were looking at previously
- Issue: When users landed on the new homepage, none of the Primary button group filters were selected by default. "All Accounts" should be the default selection
- Issue: Although this issue was known prior to testing, the "start enrollment" button should not persist for all accounts, but should only be accessible when a contract has been signed.

Takeaways

- When referencing the new Homepage UI, the only field that users were able to determine to be missing was "stage".
- All users gravitated to the search bar, and after some exploration expressed the value in the "All Accounts", "With Plans", and "Without Plans" filter button group.
- All users ignored the filter button entirely, but interacting heavily with the "arrange by" droplist. A majority agreed that sorting by "close date" would be more valuable than sorting by "recently updated". Value in sorting alphabetically was communicated.
- Many users ignored the "edit option" function on the interface, and expressed their tendency to create a new option in lieu of editing an existing one.
    - This is a key usability issue for the cancellation process. Instead of opening a plan and making changes to it, users all often inclined in essentially all scenarios to create a new plan option.

- This may be related to another issue expressed by one user that they are unable to simply review an option today and are forced into edit mode. Potential solutions need to be explored, such as sending users to the summary page or reducing the number of pages within Account Planner.

- Users largely ignored the "menu" button and showed no interest in the sales messages or print preview functions on either interface.
- Many participants found the new interface to be very usable on iPad, with little variance in experience from desktop/laptop to tablet.

Next Steps

- Refine key usability issues. At the time of completion of this report, key usability issues are in progress for being fixed.
- Follow-up with the business stakeholders and core product team to determine prioritization of findings.

Artifacts

The following screenshots highlight the existing Account Planner Homepage and the new Account Planner Homepage. Each screenshot focuses on key areas of exploration as determined by the users.

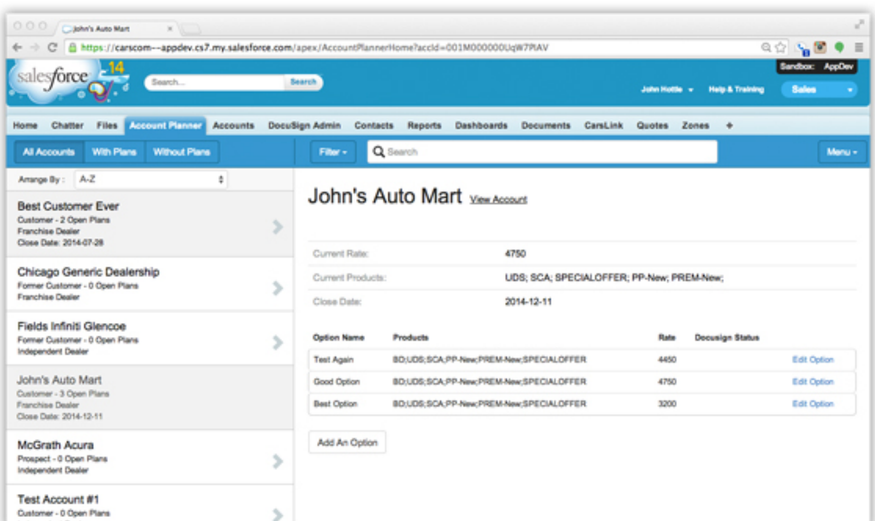

Figure 1 - New Account Planner Homepage

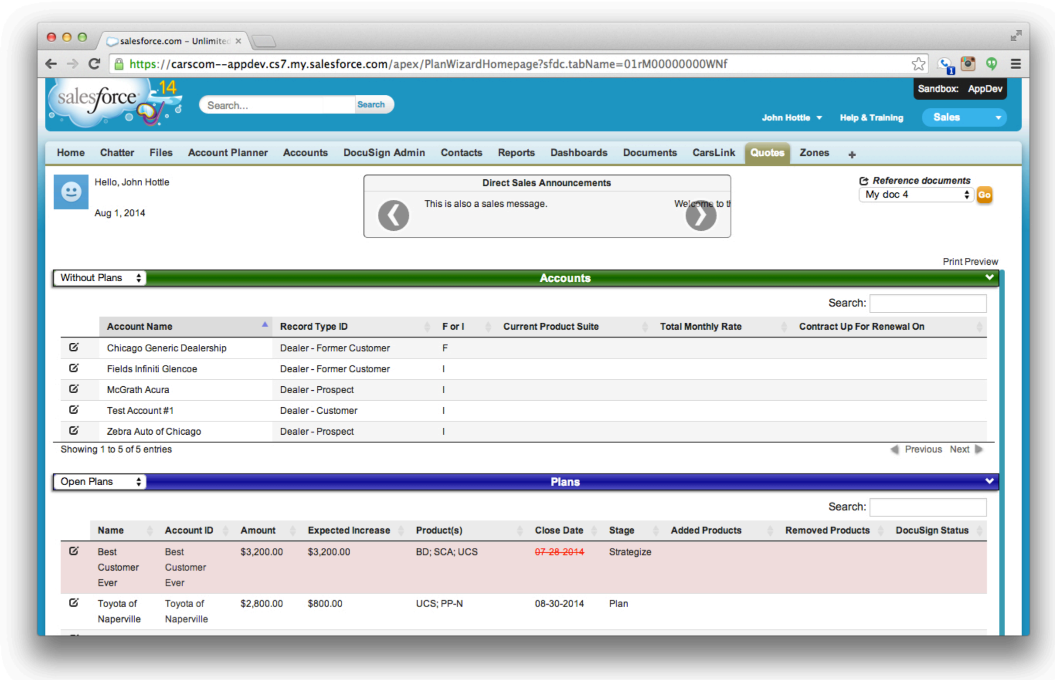

Figure 2 - Existing Account Planner Homepage

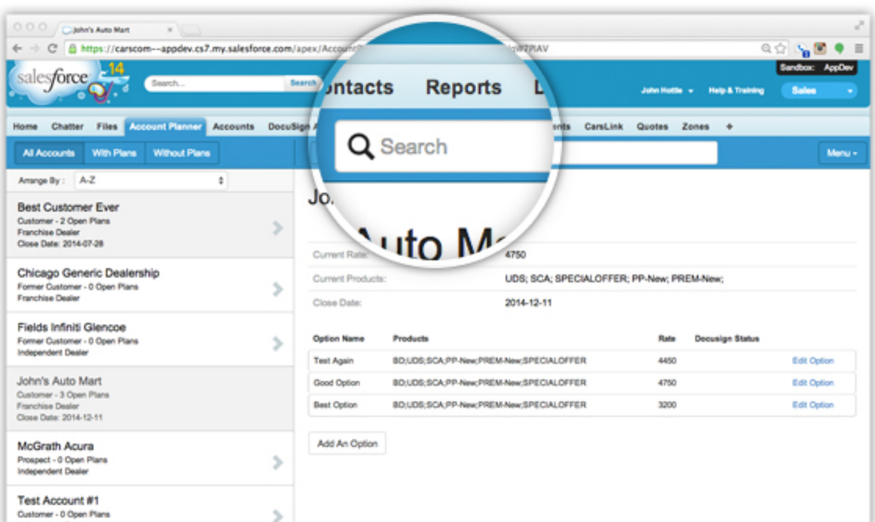

Figure 3 - In the New AP UI, all users gravitated towards the search bar to locate Accounts. This interaction was largely unchanged between both interfaces.

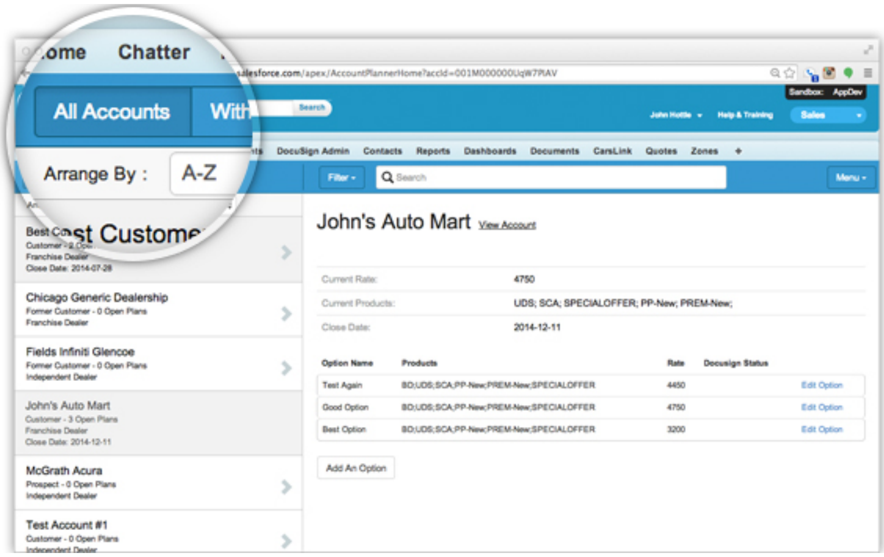

Figure 4 - The Account filter button group provided significant value to users. The "Arrange by" droplist was also valuable, but needs to contain "close date" criteria, as this was a primary concern for users.

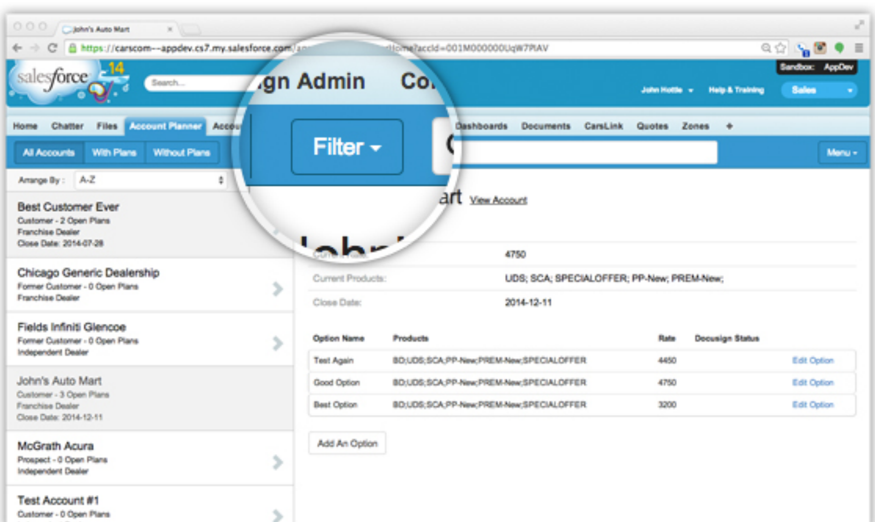

Figure 5 - The filter button was ignored entirely by users.

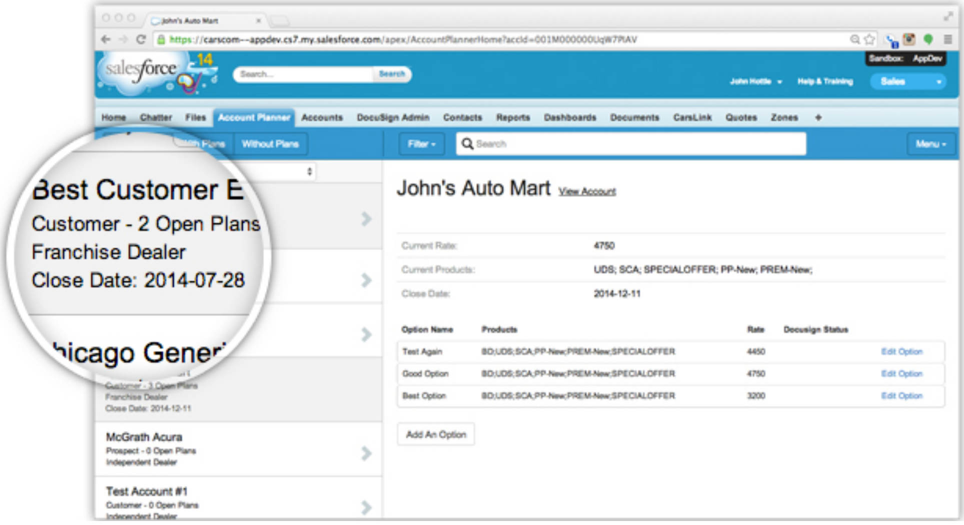

Figure 6 - The Accounts list proved to be a much more usable interface than the existing homepage. It provided better context to users when looking at the plan information. All key information as indicated by the users is provided for them here.

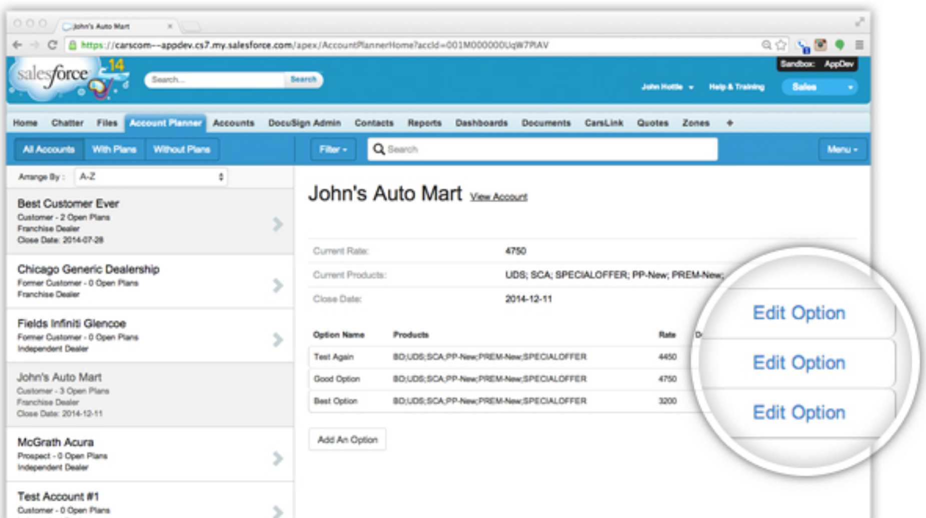

Figure 7 - The "edit option" function was ignored entirely by users. Most users expressed the action of creating a new plan in lieu of editing an existing plan.