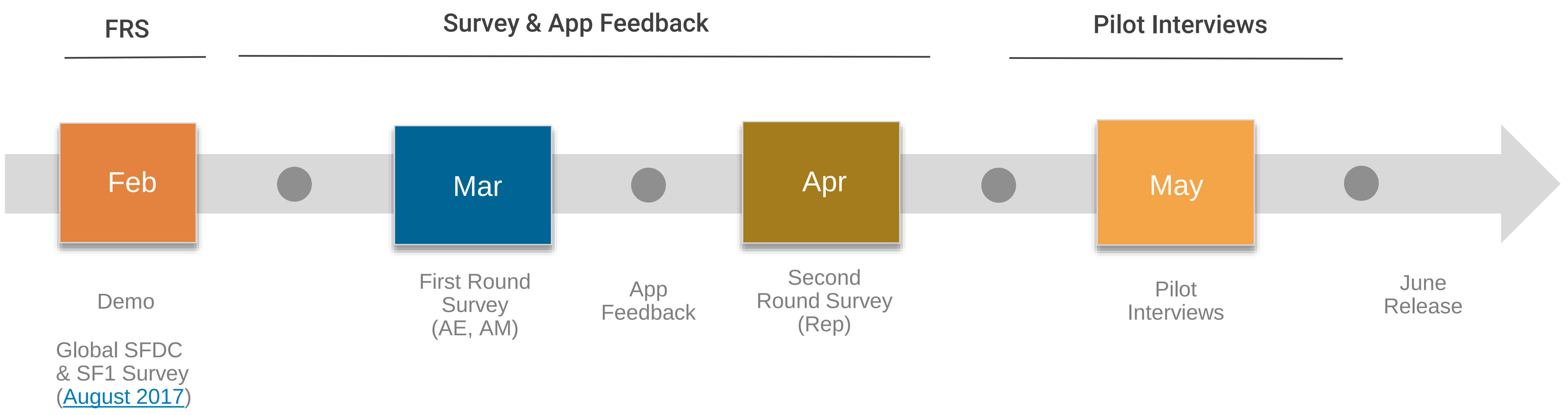
MySales App
Pilot Interviews

About the Study

- A series of interviews were conducted between May 16-21 with a commercial sales team cohort of MySales App (v.1.2.1) pilot users.
- Research aims to inform feature prioritization, identify reasons for disengagement, and assess overall value proposition for pilot users.
- Prior surveys are found here and here.
- Raw Data, Suggested UX Changes, and User Guide are included in the Appendix.

Contacts: Al Youngblood, Sheri Rosenbaum, Brei Ballog, Rob Faichney, Paul Sturrs, Alisa Robinson, and Drew Mullaney

Research Timeline



Users

	User	Role	Time in Role	Accounts/Segment	Country	Videos
Commercial	**P1 – Jarrett P**	Account Manager 4	4 years	Seven accounts. Tier 1A (Stock exchange, Healthcare, critical infrastructure, Real estate)	Australia (Sydney)	Link
	P2 – Lauren T	ISR (Account Manager 3)	5 years	West commercial and public Public state and local governments, K-12 ,Higher education, Other Corporate Accounts	USA (RR)	Link
	P3 – David B	Account Executive 1	8 Years	K-12 public education sector, Department of Education Queensland	Australia (Queensland)	Link
	P4 – Kevin L	Account Executive 4	10.5 years	Tier 1 Accounts	Australia (Sydney)	Link
	P5 – Nick M	Account Executive 3	3 years	State Governments. 6 Departments Agencies (5 Sub-departments)	Australia (Sydney)	Link
	P6 – Ingrid T	Account Executive 4	2.5 years	New ACQ, R&D, Tier 1 Accounts (Northern Territory Governments)	Australia (Queensland)	Link
	P7 – Nick M	Account Executive 1	2 years	Medium Business, New ACQ, Architecture/Law (300 Accounts)	USA (Chicago)	Link
	P8 – Tina P	Account Executive 1	3 years	Medium Business, New ACQ, Customer for Life (300 Accounts)	USA (Houston)	Link

User Profiles

Account Executive (AE)	Inside Sales Rep (ISR)	Account Executive (AE)	
			
Low Volume		High Volume	Accounts
Dedicated Accounts		Named Accounts	AE owns the account, or leads the relationship with the customer; AE typically signs off on the quotation and serves as decision-maker on the account; Interfaces directly with customer as needed, esp. escalations and service requests. Assembles service team support.
Low volume account AEs tend to have less than 10 accounts. They have a smaller support team. Much of their day is spent dealing with customer escalations related to orders, service requests, and account maintenance	ISRs are central points of contact for account maintenance, including action item follow-up, service requests, and lead follow-up	High-volume account AEs are given a territory or zip code, and service clients in a transactional capacity. Some of their accounts are former customers, or on-going service commitments. There is a lot of road-travel for this AE.	

These are snapshots of the users in the study. More research is needed to understand the full scope of MySales App users

Executive Summary

“It's 100x better than the SF1 app. It's concise and what I need.”

- P8 Tina (AE)

Executive Summary

MySales App users excited about prospect of better SF1 alternative

- Core functionality captures essential MVP on-the-go features.
- SF1 is what they are using but wish for a better app.
- Users agree they would be more productive vs SF1 (minimum 2 hours/week).

App Experience is highly usable and Information Architecture is sound

- Essential components of the MySales App fit well together to enable sales work.
- Bottom Context Switch (Accounts, Deals, Sales Portal) is intuitive.
- Users understood Page Lists (Account, Deal, Service Requests, and Orders).
- Relational model of Account/Deal to Subpage (Overview, Details) made sense.
- Standard conventions of app dialogs and menu systems easily learnable.

Executive Summary

Lack of Engagement is due to data, training, and installation issues

- Users don’t regularly uninstall and reinstall new versions.
- Perception that app data isn’t accurate (Example: P6-Ingrid unable to view accounts –FIXED, P1-Jarrett only showing perimeter funnel, distances in miles not kilometers).
- Users felt they needed a quick tutorial on the app.

Several Key Changes Needed to Refine Experience

- All Refinements appear as prioritized list in Detailed Findings
- Minor UX changes, layouts improve the user experience
- Additional functionality for editing scenarios (Trip Report), Improved Sorting/Filtering (Pipeline & Opportunities, Deals), and Improved Search.

Detailed Findings

Suggested UX Changes (Critical, High)

Priority	Screen	Recommended UX Change	Guidance & Rationale
Critical	Homescreen: Commission Summary	Protect Commission detailed information	Users worried that client or other competing rep would view that information. It should be available but demoted to less prominent page view, or at least have some kind of password protection toggle
Critical	Account Info: Trip Report	Add ability to Create and Edit	Users need the ability to add and edit a trip report; Reports are created usually after a client and verbally dictated on-site or transcribed into SFDC later in the week. On-site notes are more accurate immediately after visits
High	Deals: Overview	Add column for % Probability	Currently % Probability is listed under Deal Name; users want an ability to view a column that displays the % probability assigned to each deal; They expected a column (%) next to the amount ($)
High	Deals: Overview	Add ability to Sort Deals	Users wanted to sort deals based on Amount and Probability; Default would be deal with the highest probability (descending)
High	Deals: Details	Add Deal notes to Deal Details	Users expected that note found in Account:Account Info:Deals:Details should also appear in Deals:Deal Details. They reference deals directly from Deals, more than from the Account section.
High	Order: Details	Add Shipping Information	When discussing missed shipments users need to know where that order was shipped to

Critical UX changes are those that are “showstoppers” or otherwise lead the user to disengage with the app. These are strong blockers which need to be reviewed first.

High UX changes prevent the user from achieving their task or otherwise achieve their goal. These are mild blockers since the user will need to use another tool to complete the tasks which can lead to user frustration.

Suggested UX Changes (Medium)

Priority	Screen	Recommended UX Change	Guidance & Rationale
Medium-High	Deal: Details	Add ability to Edit Deal notes	Several users wanted to be able to edit deal information; likely they would change this information after learning new and/or more accurate information; could be on the road or after client meeting
Medium-High	Overall	Add User Settings Page	A settings page is needed to enable users to customize their experience: Search default (Account, customer), Show commission numbers, Homescreen commission view or Pipeline view, etc.
Medium	Account Info: Overview	Add More Details Screen	Users didn't want specialized information like EMC UCID Account ID on their overview, but there is a need for specialized information like Affinity ID (see below); Suggestion is to create a link called "More Details" to another screen which has more refined information like Affinity ID, EMC UCID Account ID, etc.
Medium	Account Info: Overview	Promote Trip Report below account details	Users read trip reports to catch up on customer conversations, rather than notes.
Medium	Account Info: Trip Report	Add Action Items Field	Distributed account teams need to coordinate follow-ups with internal support. Action item enables internal teams prioritize next steps
Medium	Account Info: Trip Report	Add ability to filter by Team or Segment	Notes from different accounts may be mixed when displaying chronologically (descending); Users want an easier way to group notes by team members (or segment in which those teams work)
Medium	Account Info: Overview	Demote Account Team to bottom of screen	Users already know their account team members; Rarely need to message or call them
Medium	Account Info: People tab	Swap Customers with Account team	Users prioritize customer information over account team members
Medium	Overall	Make default Search by Customer	Users are customer-focused so when searching think about customers, rather than accounts, especially in lookup and editing scenarios. Default options for search should be by customer
Medium-Low	Deals: Details	Reorder Fields	Reorder Opportunity fields as follows: Opportunity Type, Solution Type, Book Date, Stage, Product (Solution Type)
Medium-Low	Account Info: Overview	This is from SFDC Survey. Users wanted to view the Affinity ID (as available)	This is from SFDC Survey. Users wanted to view the Affinity ID (as available)

Medium UX changes hinder the user, or get in the way, of the user from achieving their goal. User must perform additional actions to complete the task.

Suggested UX Changes (Low)

Priority	Screen	Recommended UX Change	Guidance & Rationale
Low	Homescreen: Blended Attainment	Change Tab label to “Attainment”	Users were confused about whether blended attainment was accelerated attainment or standard attainment. Changing this label makes tab less confusing to users
Low	Account Info: Notes	Tie Notes with Deal	If there are any existing deals associated with notes, users want to click through to that deal.
Low	Overall	Add Alerts/Notifications Feature	Users wanted to know when there were two kinds of changes to a specific account: Deal-based [esp. big changes to deal status] and Account-based [changes to shipping, billing addresses]
Low	Overall	Ability to increase or decrease font size	One user thought that font was too small. When on the road, in poor lighting conditions, this might be a factor when reviewing long notes.
Low	Overall	Integrated geolocation functionality into auto-population of data	Users want to minimize the inputs that they are required, especially for new contacts and editing scenarios. Geolocation could be used to lessen this burden.
Low	Overall	Add User Guidance	Users prefer to have the app give all the guidance that they need, but there are some instances where they’d want to explore functionality outside of what they do
Low	Order: Details	Add additional shipping address information	Shipping address misdirection is a common cause of order delays. Users want to first verify that the address is correct before any additional actions.
Low	Account Info: Overview	Add channel and/or reseller information	Sometimes customer don’t know that AEs know they are working with channel partner, so customer makes transaction more difficult than it should be

Low UX changes are added value to the user experience that enable the user to complete their tasks more efficiently, or add a layer of sophistical to the overall feature functionality. These can be reviewed last

Homescreen

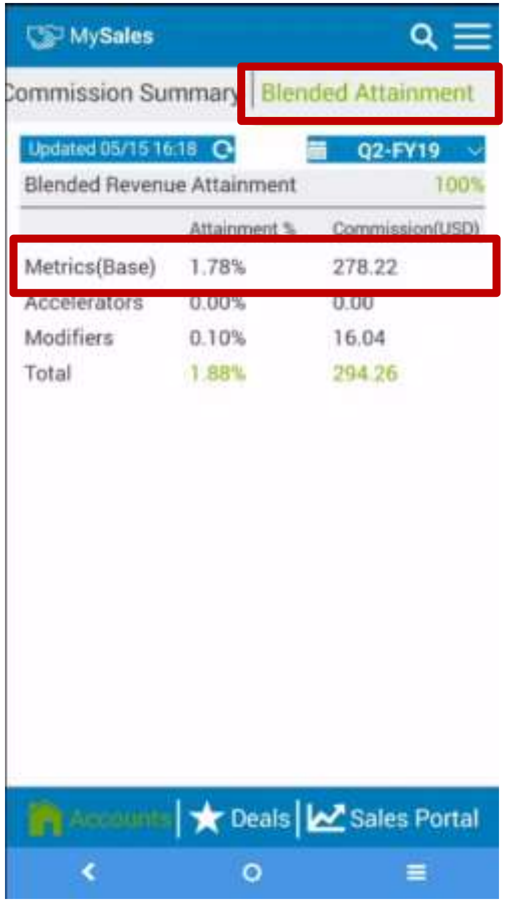
Users Expect Data Privacy

Need to Protect commission data

- AEs are typically in front of clients and other account team members most of the day, so they are sensitive about business critical information.
- While good for understanding the big picture of earnings over time, or even managing self-directed goals, more care is needed to protect this data.
- Users suggested password protection, or somehow hiding the tabs in a manner which leaves it less obvious

"I really don't want my client to be seeing my earnings. I prefer it to be password protected or at least not have it visible. For example, if I leave my phone on a table then, perhaps, someone could pick it up and view this information." **– P1 Jarrett (AE AUS)**

Attainment Needs Clearer View on Incentive



Clarify by Using "Attainment"

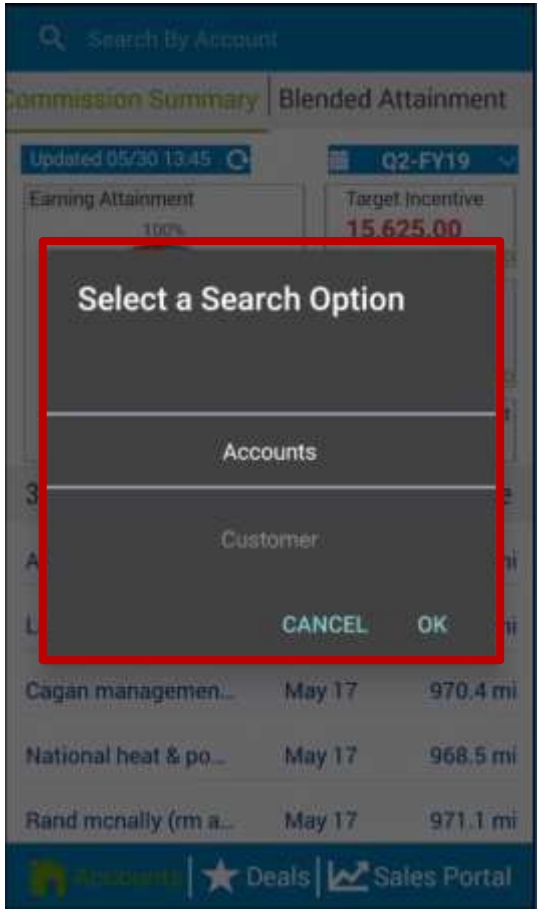
Identify Specific Metrics and How to Accelerate

- Blended attainment is what is booked in comparison to Quota, so it is a way of measuring goals as aligned to incentives.
- Currently AEs are using SCORE to get a breakdown of metrics related to accelerators/Gates and modifiers.
- Product and Campaign Specific Incentives are useful to AEs, so this can include accelerator programs (example: DellEMC CI/HCI, Storage, Data protection rolling incentives)
- P7 Nick (USA) – "This is basically all of the modifiers, and then some of what we sell. Sometimes the modifier would be storage. It's an incentive of the specific products."

"You might have a gate in the ISG bucket, and you don't get the accelerators until you get the 80% … You need to know when the bucket is full, and where it is kicking in so you are incentivized by those modifiers.**– P6 Ingrid (AE AUS)**

Improved Search Needed Throughout App

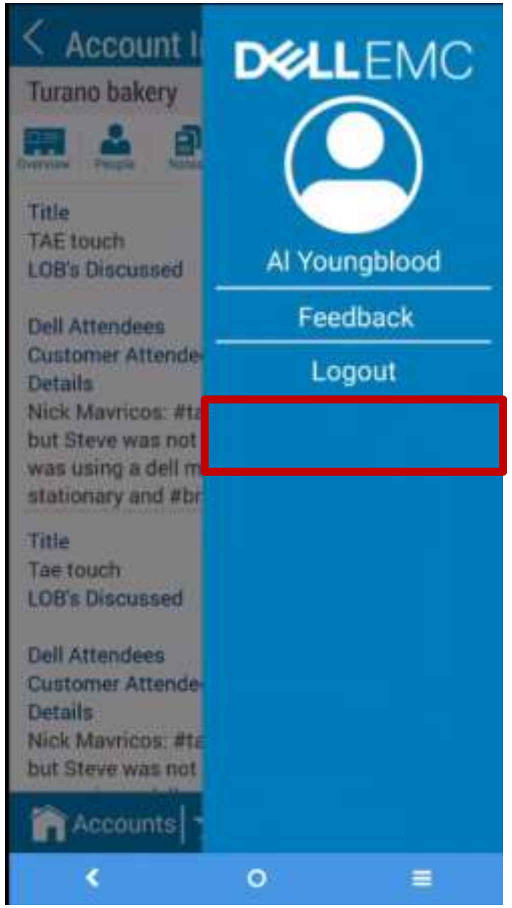
Improve Search Contexts



- Search is an important feature to quickly harvest data dense information when working within a client encounter.
- High-Transaction AEs are constantly interfacing with customers, rather than accounts, so need a better way to touch customer data quickly.
- AEs need to search on Opportunities that are closing soon which are the most critical as they are expected to close when an opportunity is 90% or higher.

"The biggest thing missing from this app is an improved way to search on open deals (within opportunities) .. The ones closing in 4 weeks."
– P6 Ingrid (AE AUS)

Brief App Guidance is Needed



Easy to Follow Tutorial on Using the App

- Users expected for an app to be most useful if it were to be easily learned without instruction manual.
- However, users did want to ability to better utilize the app by learning about all its functionality, and not just what they could learn by only using the app.

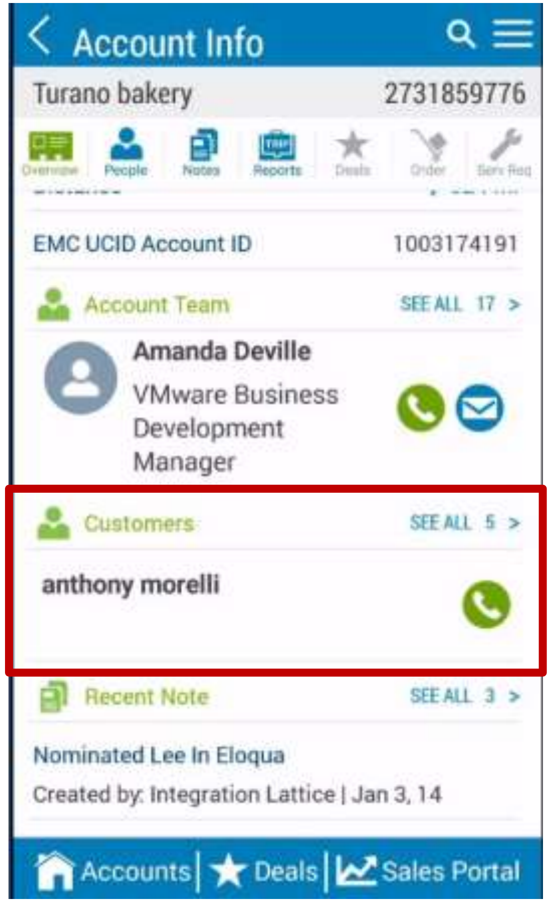
"I've learned some things from training, a brief training. But you can't expect to sit with each and every person 1-1 … A quick overview would be good." **– P8 Tina (AE USA)**

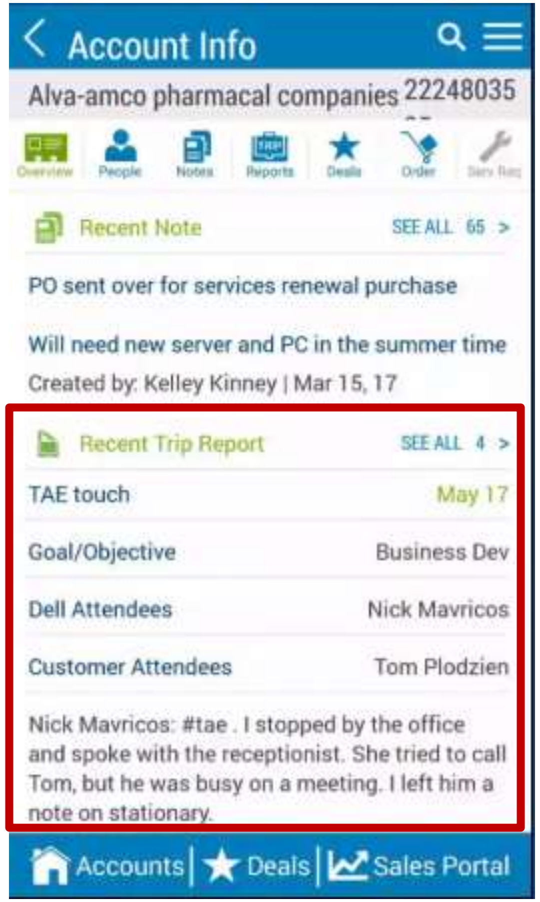
Accounts

“I used Accounts literally 10 seconds before I hopped on this call. I search the account I’m looking for and the information pops up.”

-P7 Nick M (AE USA)

Prioritize High Customer Touch





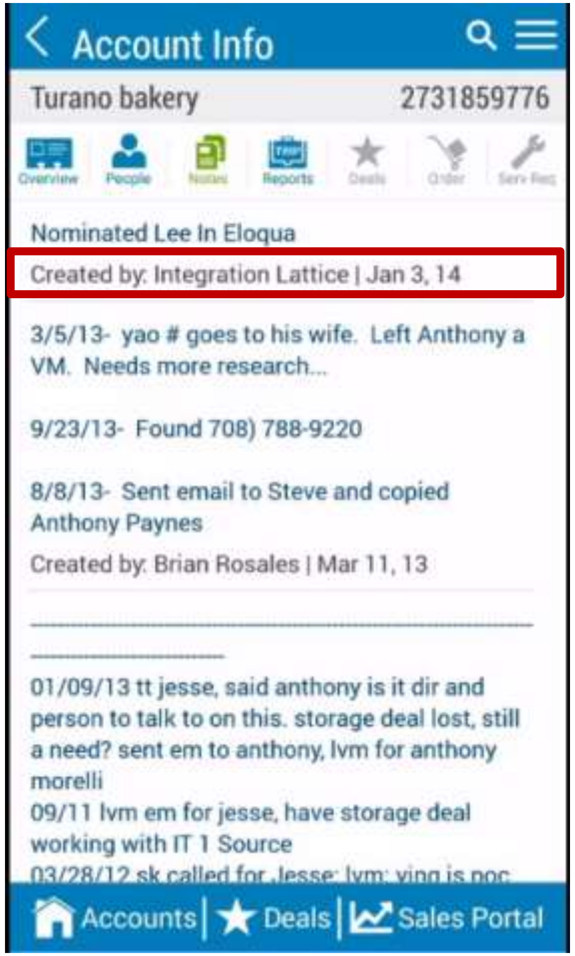
Prioritize Trip Reports

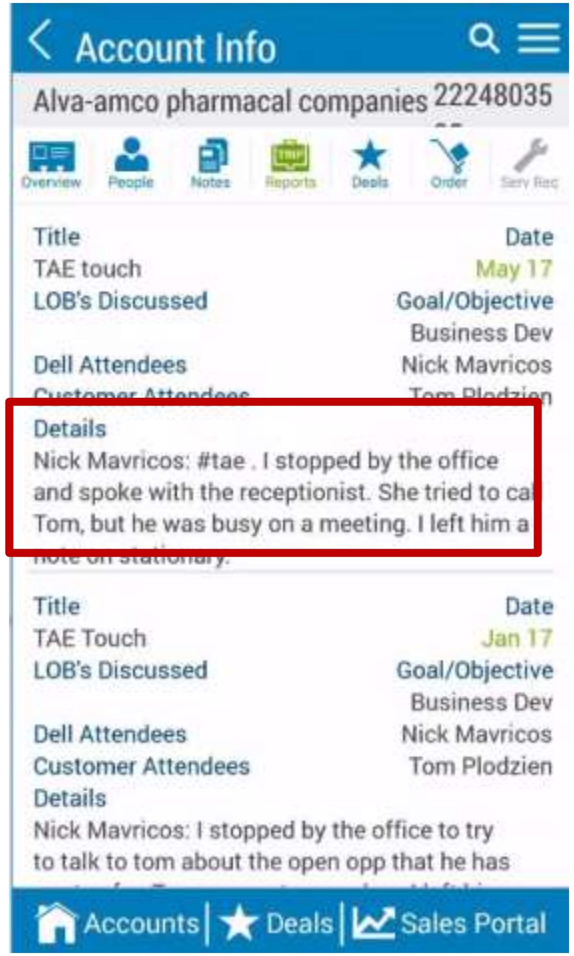
Prioritize Customer Contacts

- When scanning for account information, AEs focus on customer-relevant data, including customer team, trip reports, and contact numbers
- Trip reports are more salient than notes since the AE creates trip reports and tends to embed verbatim from client conversations.
- P2 Lauren – “I really don’t know where the notes are bring pulled from or how old they are. It’s nice to have the notes … But I tend to use trip reports for that missing information.”

> “Trip Report information is important so if you have an action, then you can follow-up and address.” **– P6 Ingrid (AE AUS)**

Account Editing Freshens Customer Data



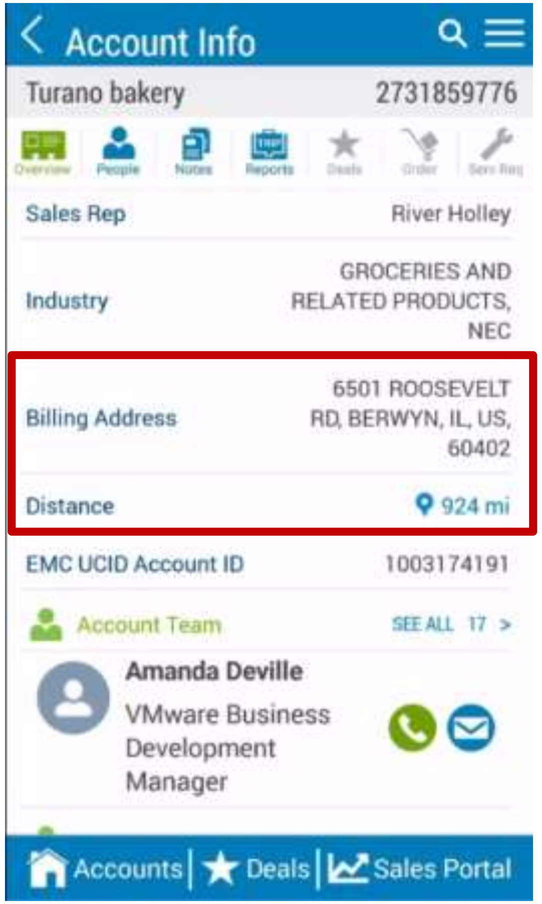


- AEs spend considerable time in front of clients and learn new information which is captured in trip reports and account notes.
- Static account information, while useful for lookups, limits the user from adding fresh customer data to accounts.
- Users need to have confidence that the information contained is the latest most actionable data.
- AEs were required to have **9 customer facing** contacts per week

Ability to Create and Edit Account Information

“There are a lot of data inaccuracies on SFDC.”
– P8 Tina (AE USA)

Leverage Geolocation to Reduce User Burden



Enable Geo Information to Populate Into Features

- High-transaction AEs are using offline Google Maps information to plot address locations of customers that need visits.
- All users believed that Visits in the Account List were tied to the Trip Report when they were created
- Users expected to lessen the burden of creating new contacts

"Geolocation is the most important feature. Like Facebook, why not allow the app to check into a location which is my client (or nearby) and use that? To update trip reports. It's about productivity." **– P4 Kevin (AE AUS)**

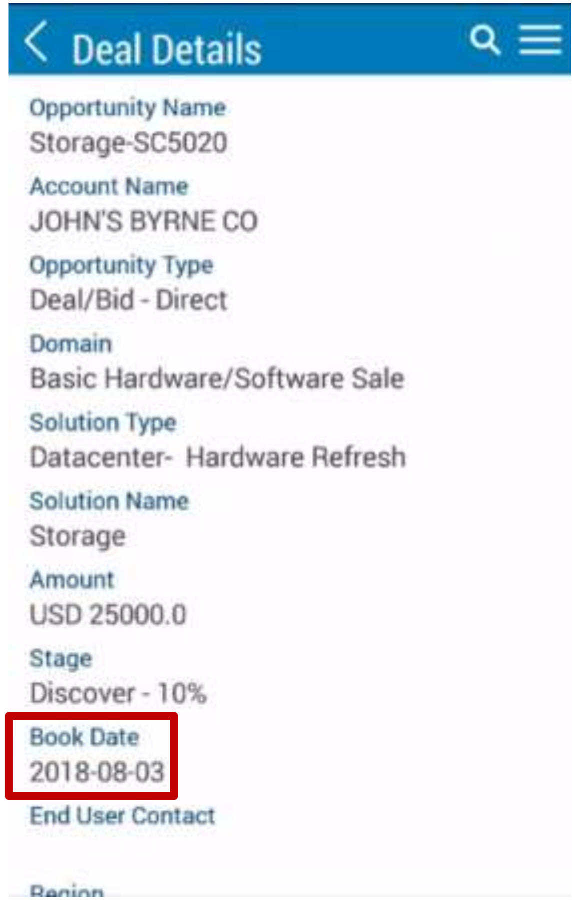
Deals & Opportunities

“It's great I can look at a customer and look at their pipeline and see when the opportunity is set to close.   It's appealing especially at the end of my sales period.”

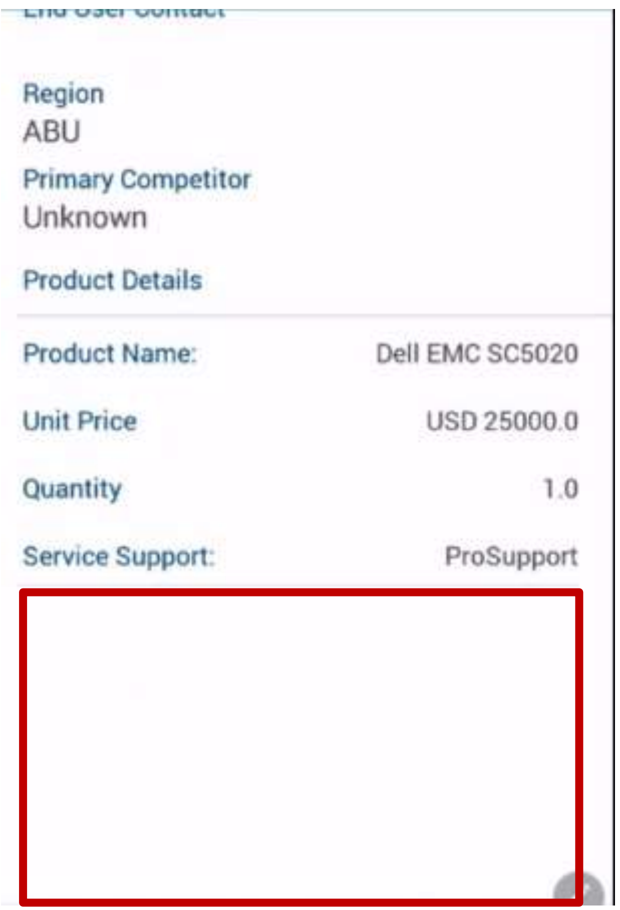
-P1 Jarrett (AE AUS)

Critical Deal Info Needs Reprioritization

Ability to Drill down on Deals by Sales Stage



Reprioritize by Sales Stage (%) and Closing Date

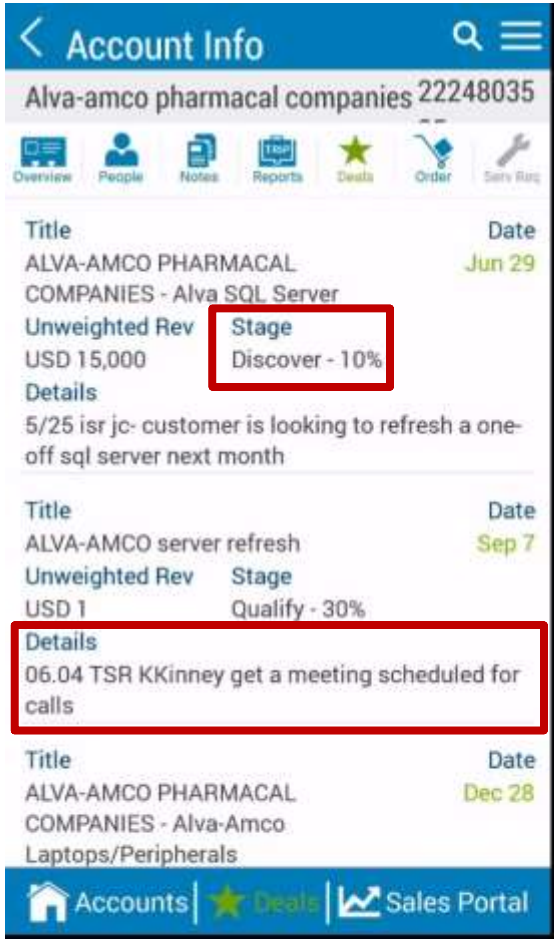


Add Deal Details Info

- Users organized their client focus based on the position of the customer on the pipeline
- Deals closer to closing were most important
- Sorting by Valuation ($) and Percentage (%) needed
- Opportunity Pipeline should be considered as a Homepage view due to its importance as a reference on Deals and Accounts

> "The focus on pipeline is to close the deal." **– P3 David (AE AUS)**

Users Need Quick Access to Impending Deals



Ability to Sort via Sales Stage

Promote Deal Details

Ability to Edit Deal Info

- When reviewing deals, all users wanted a better way to access and view deals that are about to close or are later in the sales stage. AEs are assessed by closing metrics on their pipeline.
- AEs are expected to close deals in the **90% range or higher**.
- Deal Details contain a wealth of information that should be accessible from other app views (Example: Deals: Details).
- Some users felt that editing Deal info wasn't necessary because they typically would have ISRs (support team) update those details, but they expected the information to be fresh

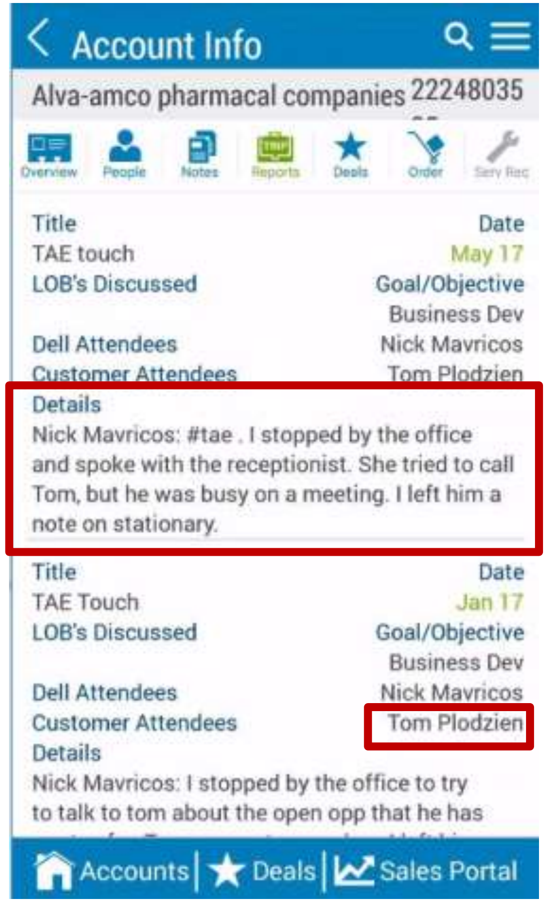
> "Currently I go through my funnel with ISRs who then look at SFDC and then refer back with my manual notes." **– P3 David (AE AUS)**

Trip Reports

“Part of my role are trip reports. This is the bane of all AEs.”

-P5 Nick M (AE AUS)

Users Need to Create and Edit Trip Reports



Ability to Create and Edit Trip reports

Ability to quickly find a customer

- Trip reports are critical because they capture the essence of a conversation with a client, including statements of current and future business.
- AEs may go for weeks without contacting a customer directly, so they need a way to remember critical discussion points to continue the conversation.
- AEs take notes directly manually, dictate them via a phone voice app (or SF1 in iOS), or type into their laptop.   Sometimes in the Car.
- Fuller trip reports are created at the end of the week, and can take between **1.5-2 hours weekly**. AEs are encouraged to complete them weekly which is often on Fridays.

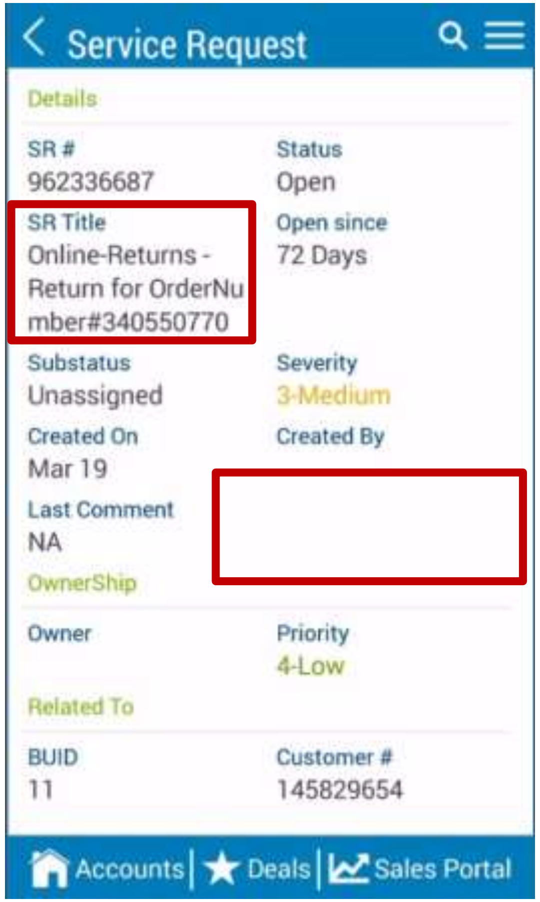
"Sometimes you have the luxury of a meeting, but often these are really coffee meetings, or sometimes in the elevator. You need a way to capture that, because once its gone you won't have it anymore."
– P4 Kevin (AE AUS)

Service Requests

“That service request information is invaluable right before visiting a client so I'm in the loop before meeting a customer. It's all about being proactive for business.”

- P5 Nick M (AE AUS)

Service Escalations Cause Account Churn



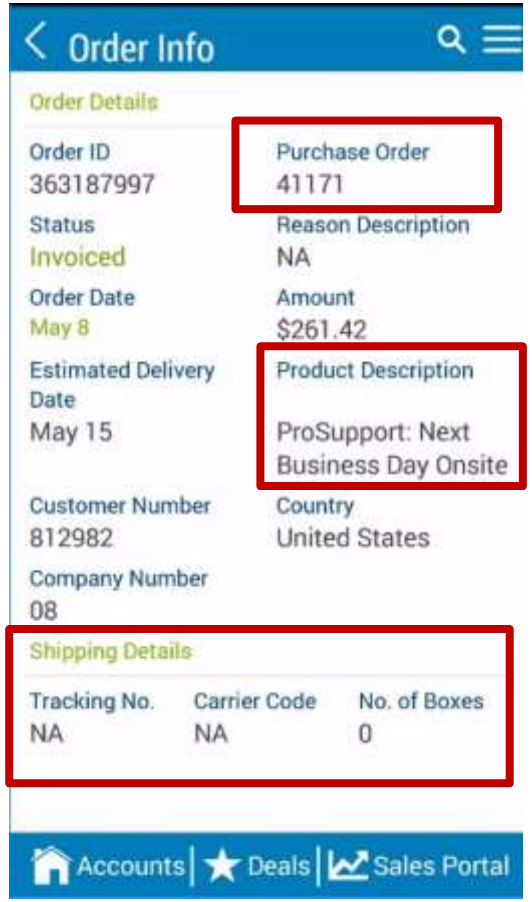
Organize Service Type and Notes

- AEs are at a customer level and are often the ones who hear last about what has happened on a customer account related to service requests.
- AEs estimated that they spend about **2-3 hours weekly** dealing with escalations for service requests.
- AEs need to have all service staff notes and follow-ups available so that they can discuss what is being done about an issue directly with a client.
- P4 Ingrid – “We need all requests. Right now they are only Dell and not EMC.”

“Typically a client will come to me because a service hasn’t happened. They aren’t being looped in … Maybe one has been outstanding for 20 days. We need to be proactive about this.” **– P6 Ingrid (AE AUS)**

Orders

Users Want Interactive Order Details



Ability to view and download purchase order

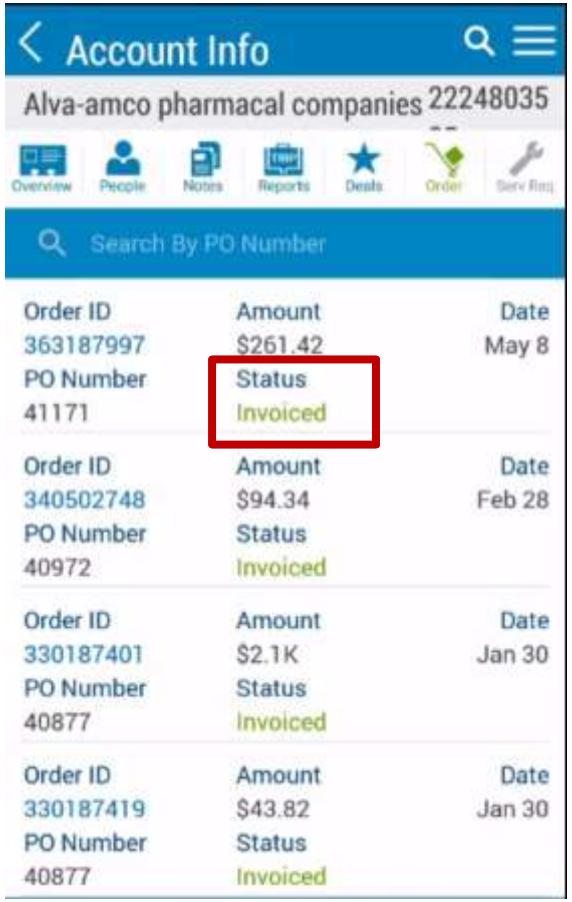
Additional Product Details

View Order Shipping Address

- AEs are at a customer level and are often the ones who hear last about what has happened on a customer account related to service requests.
- Account team needs to be able to sync their information with the AE on the ground.
- AE need clearer line of sight on purchase orders and invoicing, if they are sitting with the customer and want to review specific order details.
- P5 Nick – "Alerts might be handy when we have issues related to an order. For example if there is a 10-day turnaround, and we have SLA agreements … And we're over that time, or the product was EOL, or warranty calls are out by 2-3 days."

"Information isn't always passed down."
– P5 Nick (AE AUS)

Order Status Needs Clearer Actionability



Ability to view and download invoice

- Generally, AEs contact support ISRs to determine order status around placed orders, shipping and what stage in the process the order has taken.
- The app provides needed functionality for look-ups but users wanted to view more detailed information (invoices) related to larger orders
- P5 Nick – "AE is not always at the level of the orders in the system … I don't want to be caught off guard, and I can look in front of the customer."
- AEs tended to find these account and order anomalies related to credit on accounts, when a customer purchased and invoiced (Example: Premier page with Credit)

"For customers that we have a good relationship, they wouldn't have it. It would be nice to look more professional and it adds value to our relationship."
– P5 Nick (AE AUS)

Final Thoughts

Final Thoughts

Adopt UX Guidance in Detailed Findings

- Users were very specific about their needs on a screen-by-screen basis
- Prioritization based on critical, high, medium, and low UX impact
- Additional clarifying feedback can be sourced from cohort (as needed)

Research Follow-up with Pilot Users

- Nearly all pilot users in this study were AEs
- More study needs to be done with ISRs, TSRs, Field Sales
- Potential for Longitudinal Study (with same cohort)

"To be honest, we never really had an app that could help us. But I like what I've seen so far." **– P4 Kevin (AE AUS)**

"The app is simple and intuitive to use." **– P8 Tina P (AE USA)**

Appendix

Appendix

[Interview Guide]

[Raw Data]

[Features & Capabilities (FRS Survey)]

[Verbatim (FRS Survey)]

[MySales App User Guide]

[Global SFDC/SF1 Survey (August 2017)]

Interview Guide

<u>PART 1: Interview (Directed Questions)</u>

- **Background (5 mins):**
  - Role?
  - Time at Dell/EMC
  - Team and Unit?
  - Commercial Segment: Type of accounts/clients, etc.
  - What might a typical work day look like? (**BRIEF**)
  - Sales App used before?
- **App Usage (Current) – (5 mins):**
  - When was the last time that you used the sales app?
    - What kind of phone (Android, iOS, other)
    - Circumstances (time of day, context)
    - What was your experience?
  - How often? (Daily, Weekly), When? (morning, afternoon, evening), Where? (on the go, office)
  - Are you more or less productive with app? If you are productive how much more would you say?

<u>PART 2: App Walkthrough (User + Skype Control + MySales App RealTime Emulator)</u>

- **Typical Use (3-6 mins)**
  - Can you walk me through how you typically use the MySales App
    - Be sure to talk out loud
    - Be sure to swipe slowly on the emulator using your mouse
    - This phone is my personal phone
- **Blockers & Delighters (5 mins)**
    - Biggest issues? Why?
    - What feature or function really delighted you? Why?
- **Issues & Enhancements (5 mins)**
  - What features are important to you?
    - Why?
    - Can we improve them?
  - Any missing functionality?

Raw Data

Raw Data

Microsoft Excel Worksheet

Microsoft Excel Worksheet

Interview Data (Unformatted, raw)

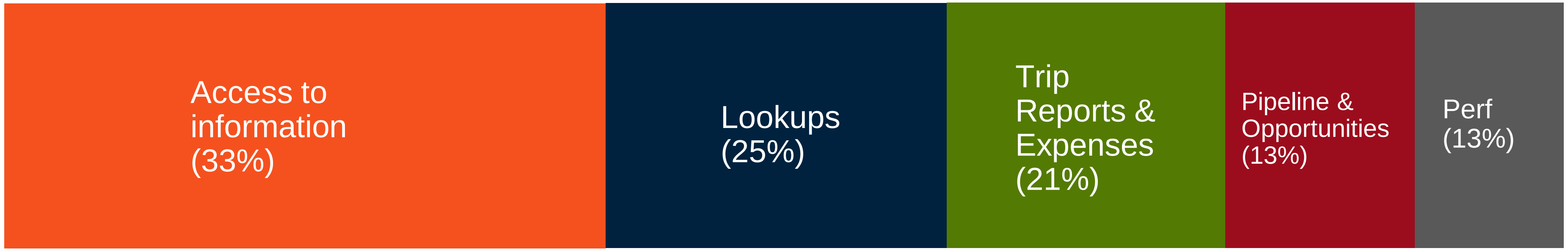
Spreadsheet of UX Changes

Features & Capabilities

FRS Sales Rep Survey March 2018

Most Useful Aspect – Current App

Q19 – What do you find to be the most useful aspect of your current mobile sales application? Please explain.



N=24

Full Verbatim

- **Access to Information** is the ability to the ability to access critical information. This is a general need for on-the-road scenarios while visiting client offices and while traveling.
- **Lookups** are capabilities related to retrieving account, customer, and sales information like assigned reps, contact information, accounts for information as needed.
- **Trip Reports & Expenses** are capabilities for creating and editing trip reports, and including expensing for client visits.
- **Pipeline and opportunities** is the ability to view pipeline and use opportunity management.
- **Performance & Usability** are ways that ensure that the app is available when needed and that users can navigate quickly and it is easy to use.

Delta: ISR/ASEs were less focused on data intelligence for planning; they wanted to app to just work when needed

Missing App Features – Current App

Q20 – Are there any features or functions that are missing from your current mobile sales application? Please explain.

N=19

Full Verbatim

- **Other** a host of missing app features, including search, Maps, Multi-instance SFDC linking, channel features, and configurable dashboards.
- **Usability & Performance** is related to improving the workflow of the app itself, better synchronization, navigation, and improved support features.
- **Deal, Opportunity & Forecasting** is the capability for improved access and creating opportunities, registering and creating deals.
- **Quota & Attainment** is being able view sales attainment and quota information.
- **Order Tracking** is being able to received notifications and status updates on the orders through the delivery lifecycle, and being able to lookup this information via the app.

Delta: ISR/ASEs wanted more quota attainment info & better order visibility, tracking

Most Useful Capabilities – General

Q13 - What capabilities would make a mobile sales app most useful to you? Drag and drop the below selections in rank order.

N=67

Ranked Capabilities
Account information
Recent account news
Pipeline information
Contacts (Sales Team/Customer)
Trip Reports
Opportunity create/edit
Quota & Attainment
Order visibility (with details)
Service Requests
Assets/Install Base
Search capability
Notifications
Partner/channel information
Other

Trip Reports | Search | Assets/Install Base | Service Requests | Recent Account News

- **Trip Reports** is the ability to create and edit trip reports.
- **Search** is being able to search through the entire set of account, customer, pipeline, and deal information in one Google-like feature.
- **Assets/Install Base** is was the management and information display of the datasets, assets, and the installed base.
- **Service Requests** are ways of connecting to service the application and other related feedback.
- **Account News** are notifications and updates on account information.

Delta: ISR/ASEs were more focused on Trip Reports and Search than Managers/AEs who mainly wanted pipeline account information

Other Needed Capabilities

Q14 – Are there any other needs that would make a mobile sales application most useful to you? Please explain.

- **Partner Information** – Access to partner information in addition to customer info
  - Partner per customer per opportunity
  - Partner entries for large opportunities in separate pipeline tools
  - Public news and collateral
- **Sales Management** – Access to track and manage sales information
  - SCORE access
  - DAM access
  - Price protection form
  - Sell Out Promotions
  - Sales Results & attainments
- **Geolocation & Localization** – Ability to use app location to perform specialty options
  - Learn about the geography, territory, industries, climate, culture
  - Nearby partner information and sales teams to meet with during free time
  - Set Language to current location
  - Map travel routes to visit multiple customers
  - SSO – single sign on via location
- **Knowledge Sharing & Collaboration** –
  - Shared, configurable team dashboards
  - Brand momentum Score (BMS) – of customer through funnel – BMS Revenue
  - Chat and call logs access

Delta: ISR/ASEs were more focused on Trip Reports and Search than Managers/AEs who mainly wanted pipeline account information

Full Verbatim

Verbatim

FRS Sales Rep Survey March 2018

Most Useful Aspect

Q19 – What do you find to be the most useful aspect of your current mobile sales application? Please explain.

Q19
Use SFDC for trip reports and client information. Also use Concur expense app for receipt entering into application.
none, slow & clunky. Not user friendly at all
Not much other than the odd contact
Ease of login and information quickly available
Ability to do trip reports on the road
Quicker to look up customers and deals than power up laptop and log in etc.
Easy access to Account contacts
Not very use, it is slow, mediocre UI
It is linked to Sales Force, so it reflects pipeline in real time
Ability to find customer information and do trip reports while on the road.
Sfdc trip reports deal pipelines, etc.
That I can access it without my notebook / without having to log on
Quickly access , flexibility and agility to find out Sales Information
access to Account detail, creating trip reports
Accessability to all partner account/enduser/opportunity information. Review all previous information with regards to previous mentioned elements
100% availability
simplicity, less clicks
Getting customer info on the go, but it is hard to navigate at times

Taken from Prior research survey is found here and here.

Missing App Features

Q20 – Are there any features or functions that are missing from your current mobile sales application? Please explain.

Q20
access to attainment and sales by account, order lookup
N/A
None on current apps.
Better workflow
It is clumsy as a phone application. ideal to quickly change a book date or a probability, not so good to truly manage the pipeline or enter new deals
Support tickets deal creation, etc.
check in, quick info
Easy access to creating and viewing opps, trips etc
It is always linked to one SFDC instance, channel features are missing, dashboard is not configurable as far as I know
not really, working really fine
Access to all Partner/Channel information: pipeline information, Quota & attainment, recent account news, contacts, trip reports, order visibility including details, notifications, opportunity creation and changes, assets & installed base, account information, search capability, services requests, other channel related aspects...
no
Address Mapping, forecast
No
google like search
N/A
No access to opps, order tracking, HAC, ETA's etc
useablity for entering trip reports
na
Easy accessible data, SalesForce1 is difficult to navigate at times

Taken from Prior research survey is found here and here.

Other Needs

Q14 – Are there any other needs that would make a mobile sales application most useful to you? Please explain.

chat service, secure call to customer, call log after the call ended
Easy to access without too many logins and processes to use.
None
Quick easy simple and include ways to increase knowledge while traveling throughout territory.
Adding/Including Partner information is just as important as the customer information from a teaming perspective. Having mobile access to the partner information per customer per opportunity is valuable. Also, adding nearby partner locations/addresses for the sales teams to meet with during free time. thanks
no
Of the previous listed needs. Its hard to rank because all is important. I could go into SFDC on my phone if I had to - but every thing in one place would be the most important.
the previous list seems completed
Until I can go thru it, I can not proposse any missing function
Just make it happen
Price protection form - pending to answer , Sell Out Promo results and attainments,
no
N/A
Score access and perhaps BMS
no
NA
N/A
Partner entries for large opportunities on separate pipeline tools.

no
NPS (who gave what feedback in the last 2 rounds of NPS). Open calls or open orders Accounts paid up or overdue, as well as the ability to email invoices and statements from the app to the customer
I need something that I can update on the go. If I am at a dr. appt and my AE texts me something urgent, we can move quickly without pulling everything out and going through the 30+ steps to connect.
ease of use
N/A
social collaboration function within account team. Sharing
Mobile Gov/OMS
 n/a
Language localization
No
ease of use, access to information
no
User friendly, smooth interface
Configurable dashboard that can be shared with other users
ease of use
Gii access with DAM
visibility of closed opportunity PO's
BMS revenue and distri revenue
Being able to pull information on where the customer competition has been in the news talking about new projects/technology. Talking points within their industry, that we can look at and engage them on during the meeting. Any big wins that we can reference within their industry either locally or globally.
no
The ability to map a travel route to visit multiple customers.
N/A
If the app will work like at the FRS it will be a powerful tool, so at the moment i have no other idea
...

Na
I loved the demo i saw on frs videos
It must be easy to use and reliable. Sometimes itâ€™s not possible to use Salesforce1 for trip reports for example as it wonâ€™t allow you to add it and can be temperamental
d
no I think you have covered them all
N/A
Cant think of any
No
none
Unsure. Being able to link opps, to quotes to orders in a flow would be useful
great U/I for Android, Doesn't kill battery life Speed of CDN
N/A
no
Nope.
No
Useability!
No
none at this time
Hggfdhhgfdhdgf
The ability to access DADD in SFDC within this app.

MySales Mobile App User Guide

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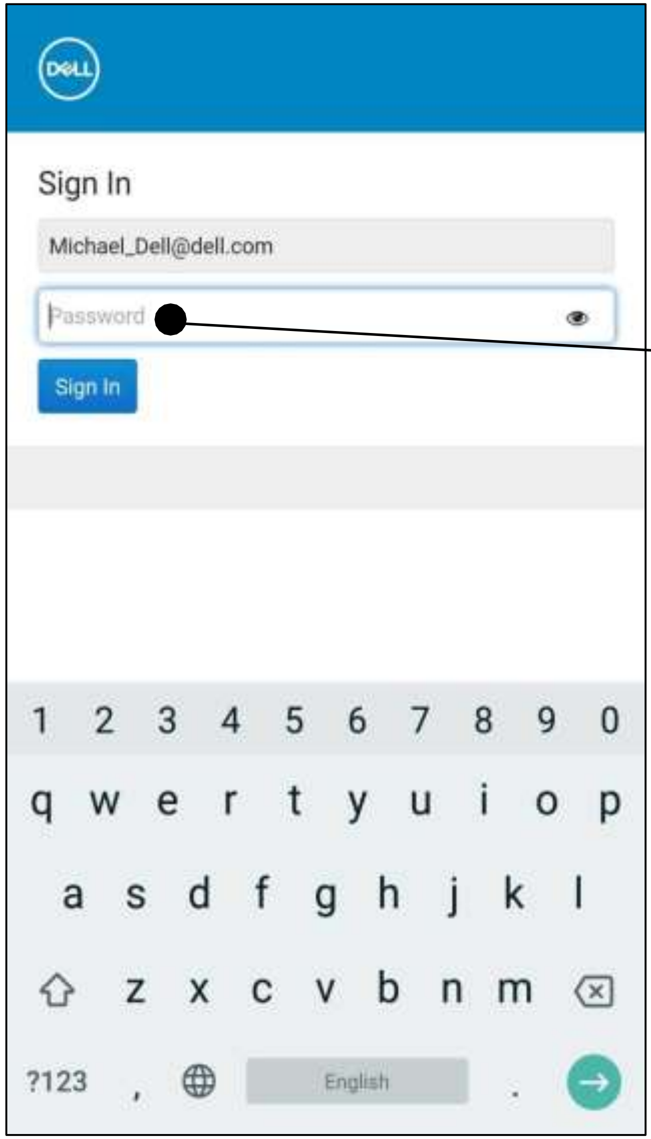
For more info, contact Sheri Rosenbaum about the MySales App Guide

Internal Use - Confidential

MySales Mobile App User Guide

Login Screen

Use *Dell email address using “_” NOT dot (i.e. John_Smith@dell.com)



Enter NT Password

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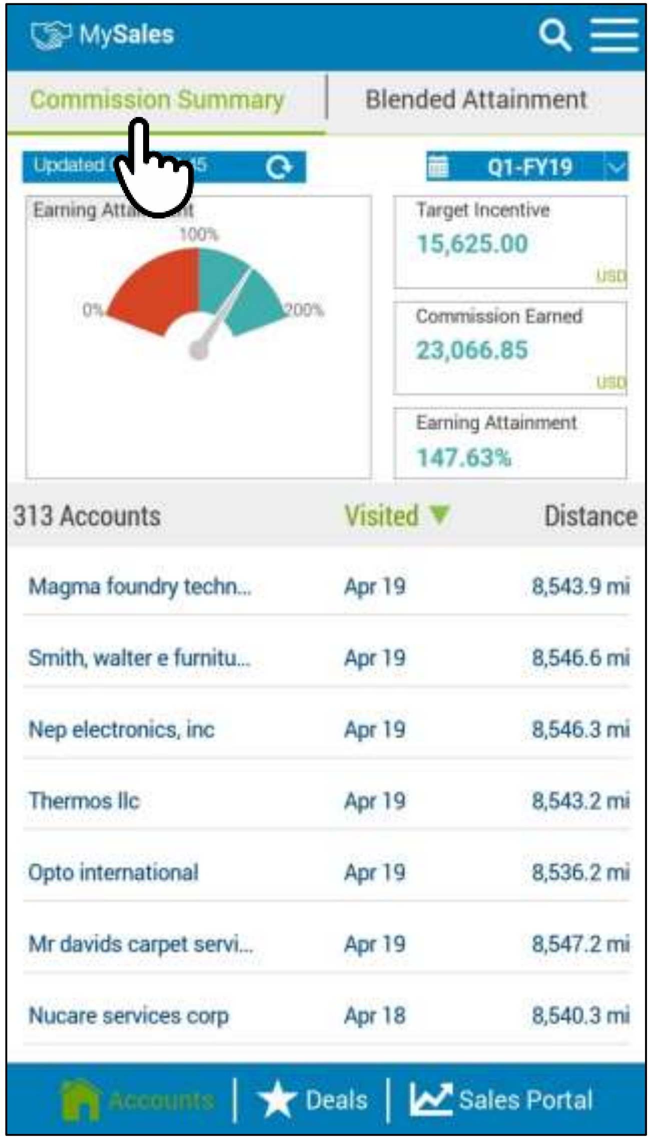
Internal Use - Confidential

Home Screen



The Home Screen let's you view:

- Commission Summary
- Accounts sorted by the "Last Visited" Date
- Current distance from each account (based on Ship To, if not available then Bill To)
- Blended Attainment details

Toggle between Commission Summary and Blended Attainment

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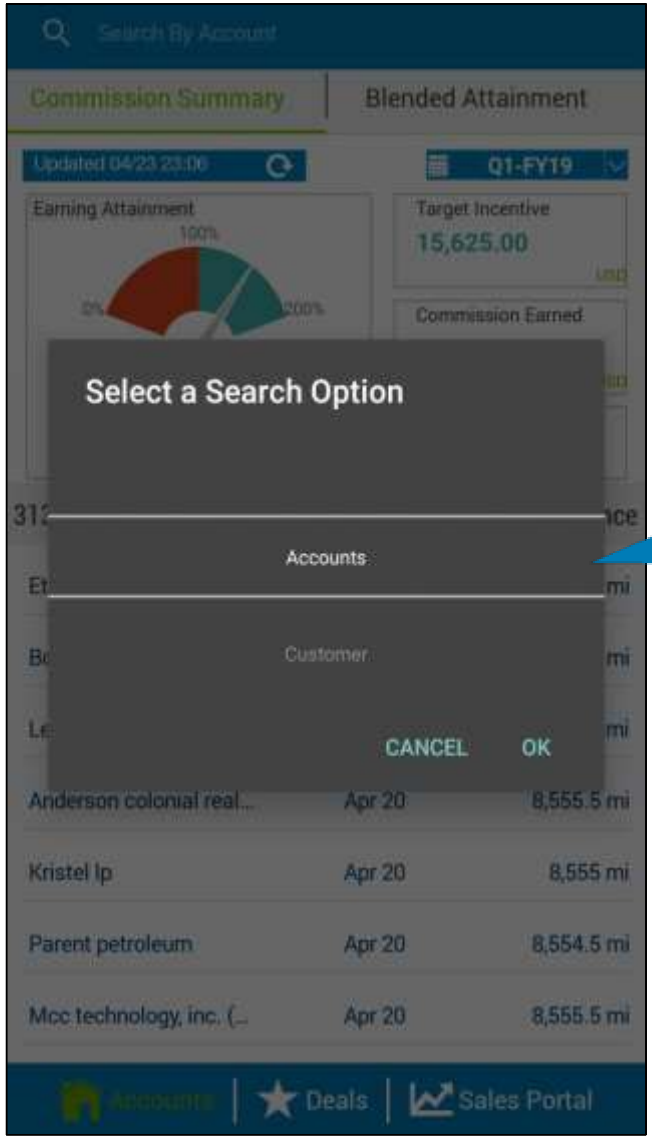
Home Screen - Search by Customer/Account

Click to Search by Account



Search by Account or Customer

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DELL EMC

Home Screen – Find Nearby Accounts

Click on Account name to view Account Details

Find Accounts near your current location. Distance based on Ship To address. If NA, calculated by Bill To Address.

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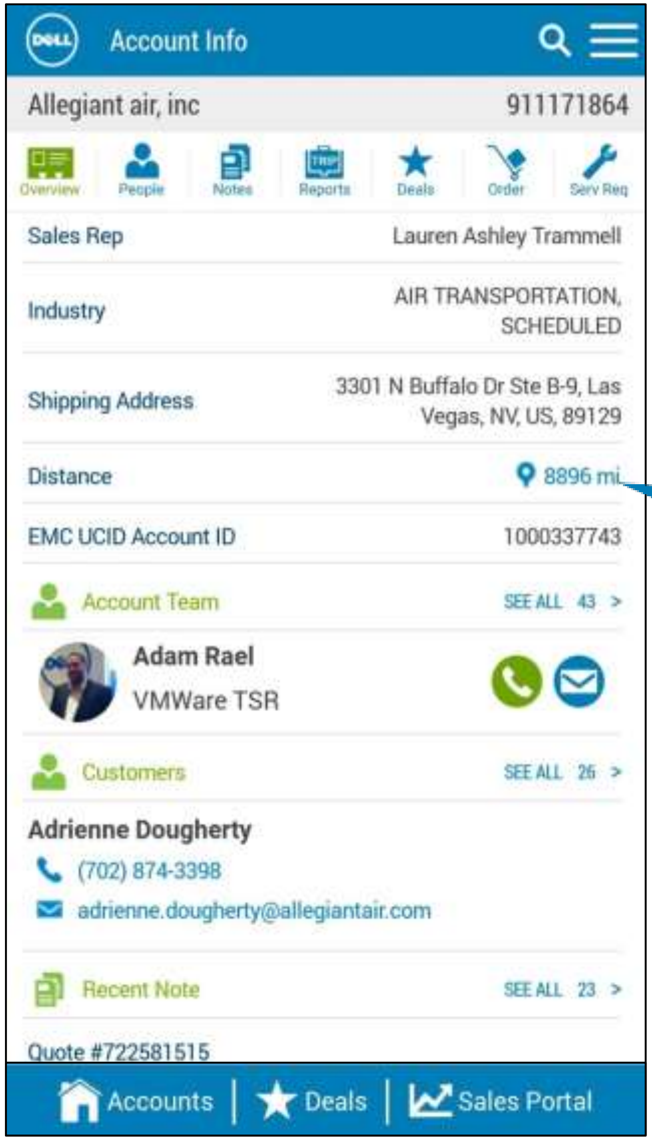
Internal Use - Confidential

Account Details



Open in Google Maps or call Uber

The top menu bar lets you drill down into detailed areas of a specific Account.

- **Overview** – High level information regarding account
- **People** – Dell EMC account team and Customer contacts. Call or email directly from the app.
- **Notes** – Notes entered on the account by MySales app user
- **Reports** – Trip reports sorted by most recent
- **Deals** – Deal Registration information
- **Order** – Order detail information including tracking numbers for the account (currently only Dell orders)
- **Ser Req** – Service requests for the account (currently only Dell orders)

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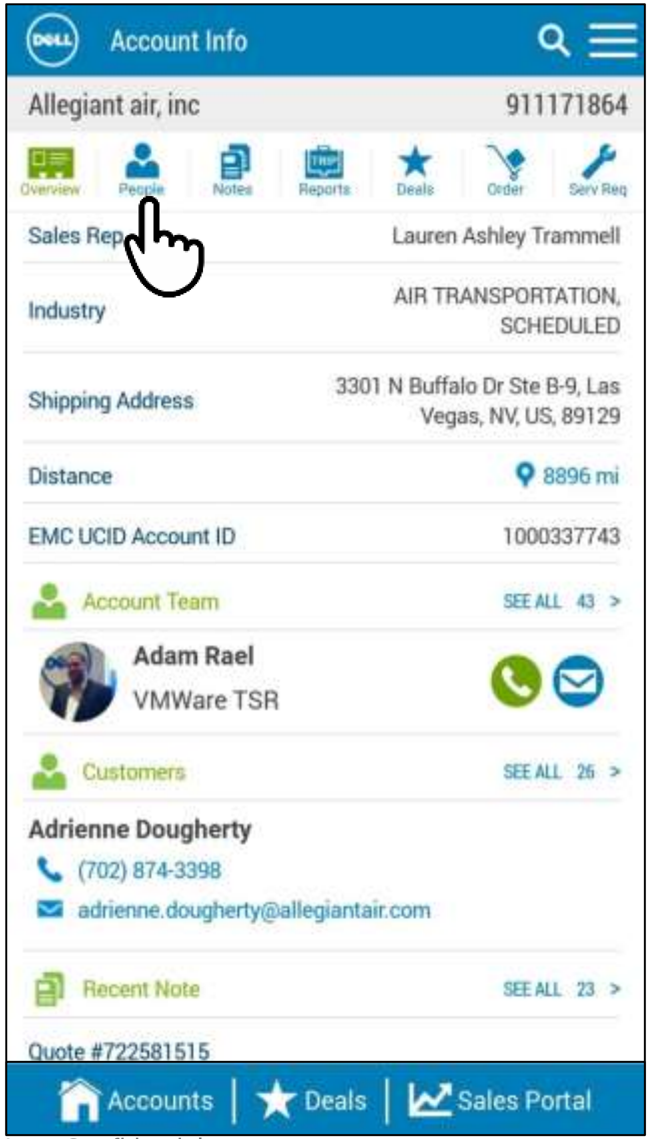
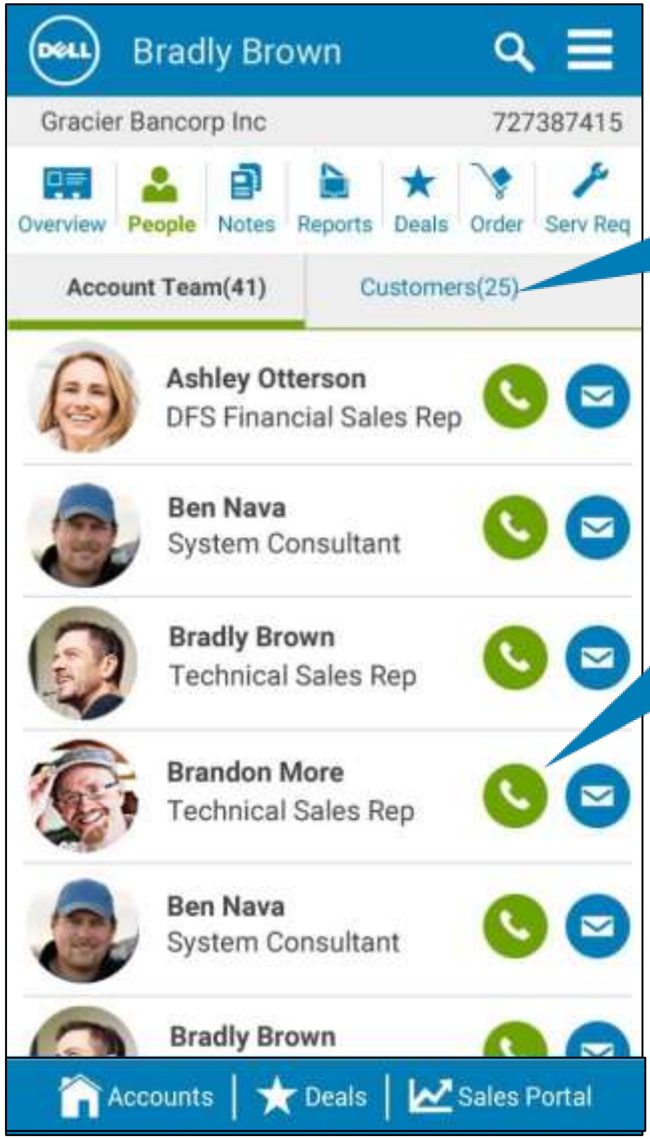
Internal Use - Confidential
DELL EMC

Account Details - People

Click on People icon to view contacts





Toggle between Account Team and Customers

Click phone or email icon to contact Account team or Customer

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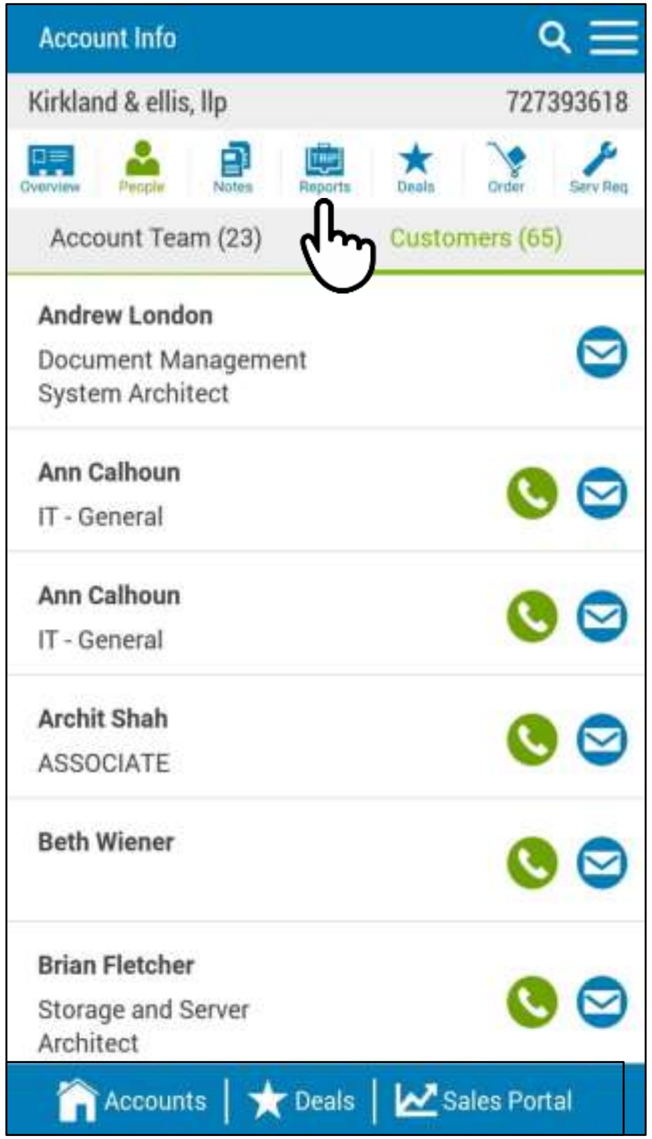
Account Details - Reports



Click on Reports icon to view Trip Reports

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Internal Use - Confidential

DELLEMC

Account Details - Deals

Click on Deals icon to view Opportunities

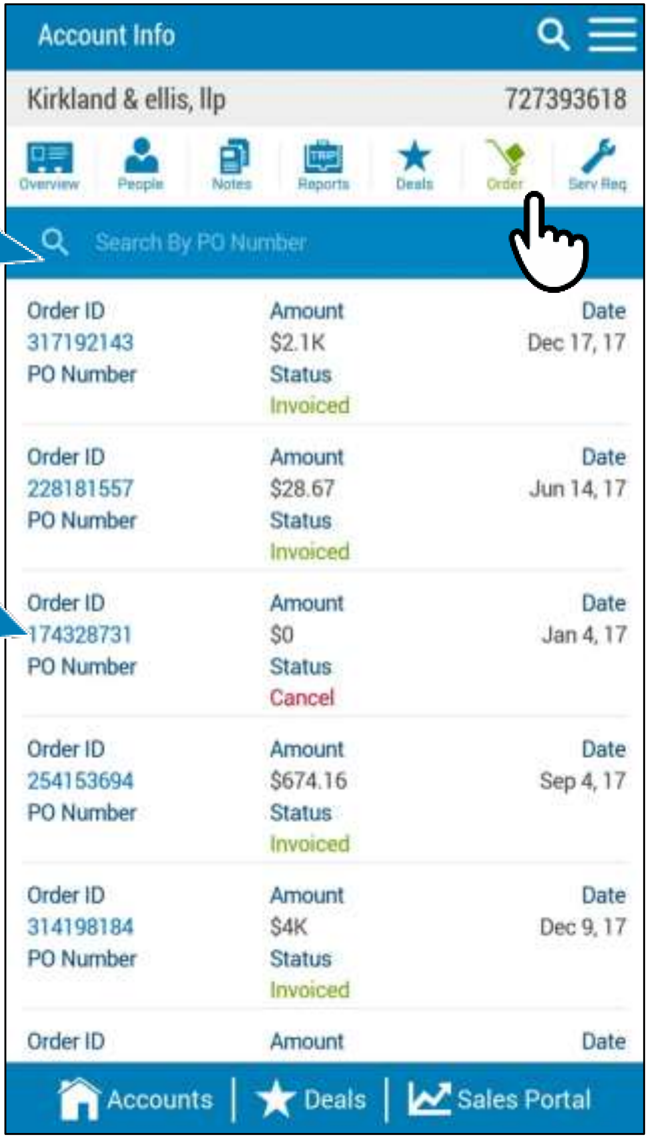
Table of Contents

Internal Use - Confidential

Account Details - Orders

Search orders by PO Numbers

Click Order # to view Order Details



Click on Order icon to view an Account's Orders

Note:

Currently only Dell orders are available.

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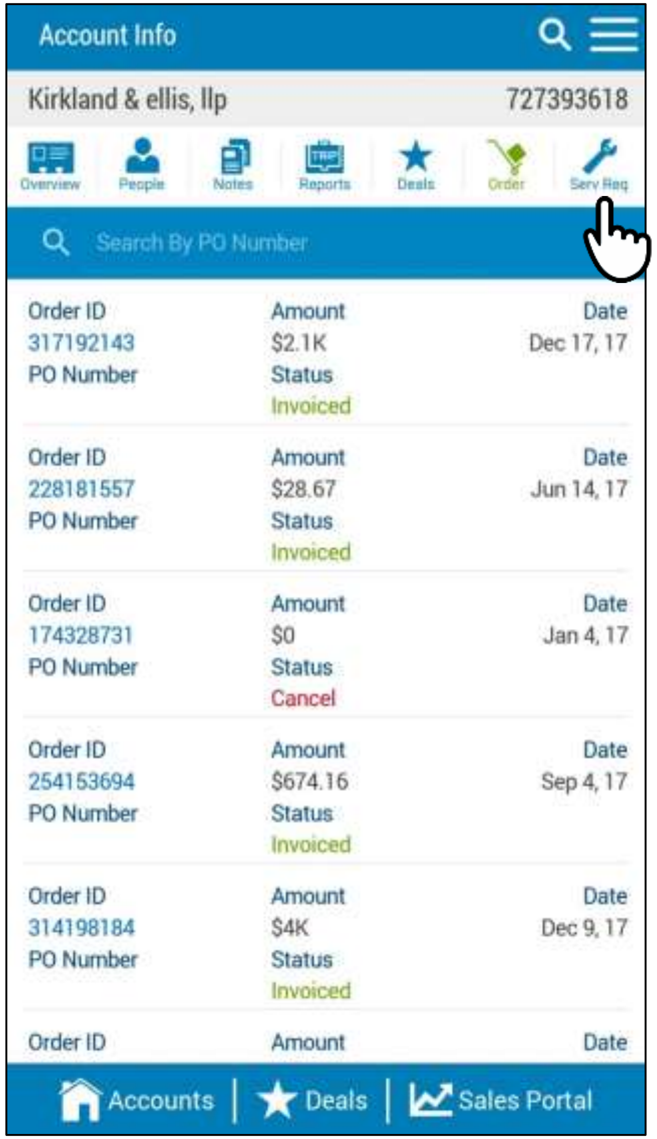
Internal Use - Confidential

DELLEMC

Account Details – Sev Req



Click on Sev Req to view open SR's

Note:

Currently only Dell Service Requests are available.

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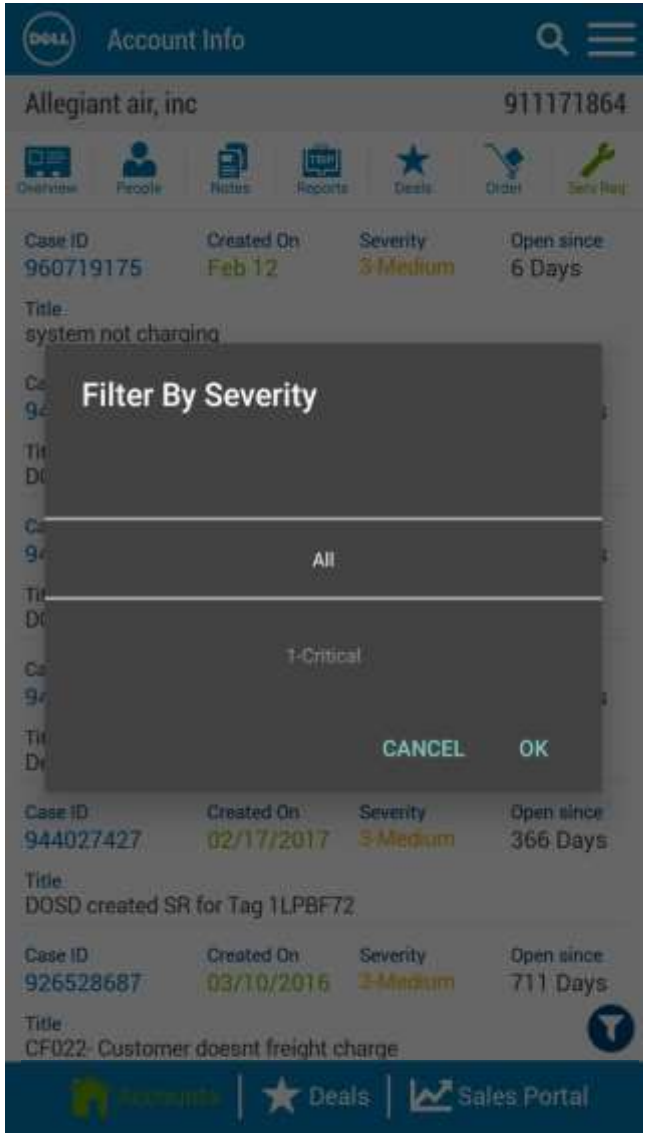
Internal Use - Confidential

Account Details – Sev Req cont

Click funnel icon to filter Service Requests by severity



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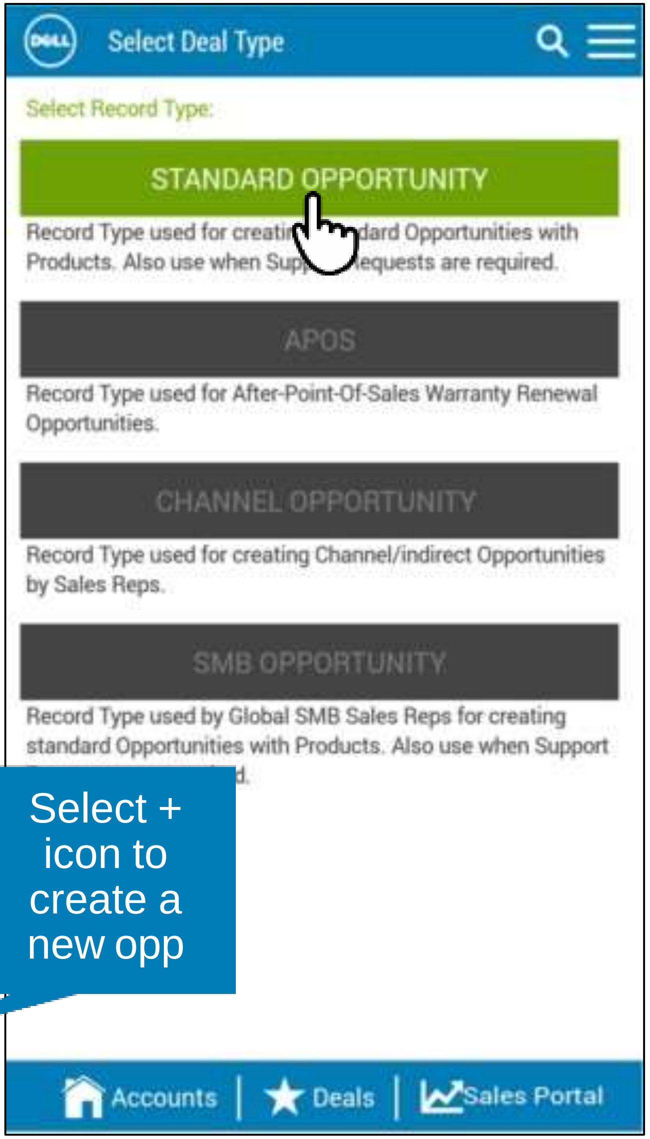
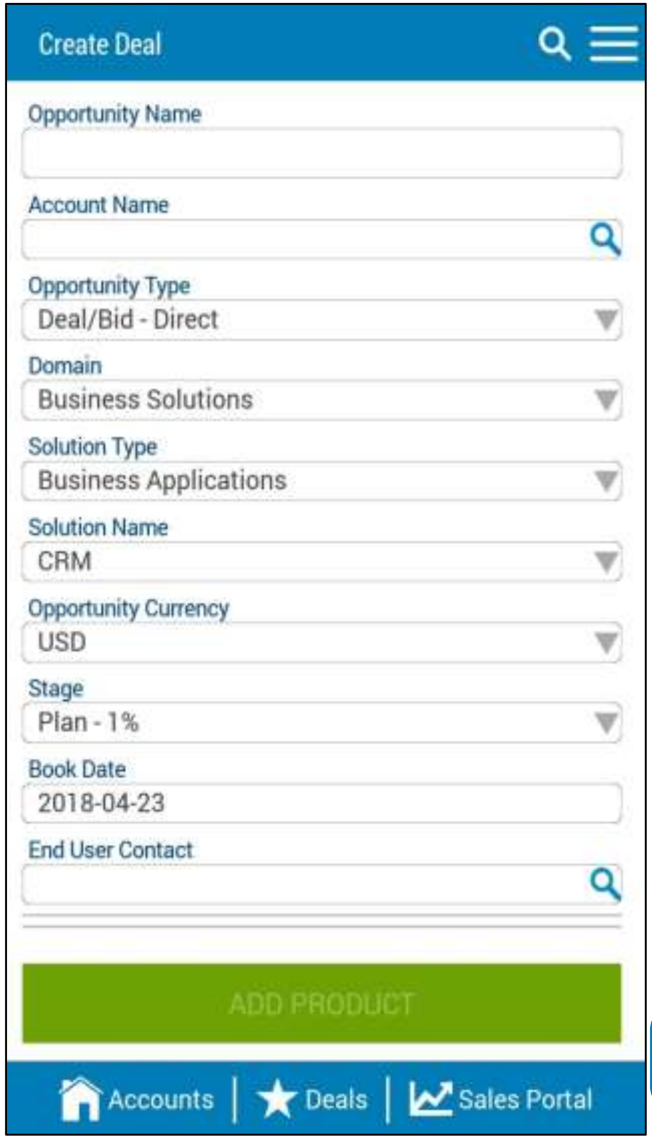
Internal Use - Confidential

Pipeline & Create Opportunity

Click Deals to view pipeline

Select + icon to create a new opp





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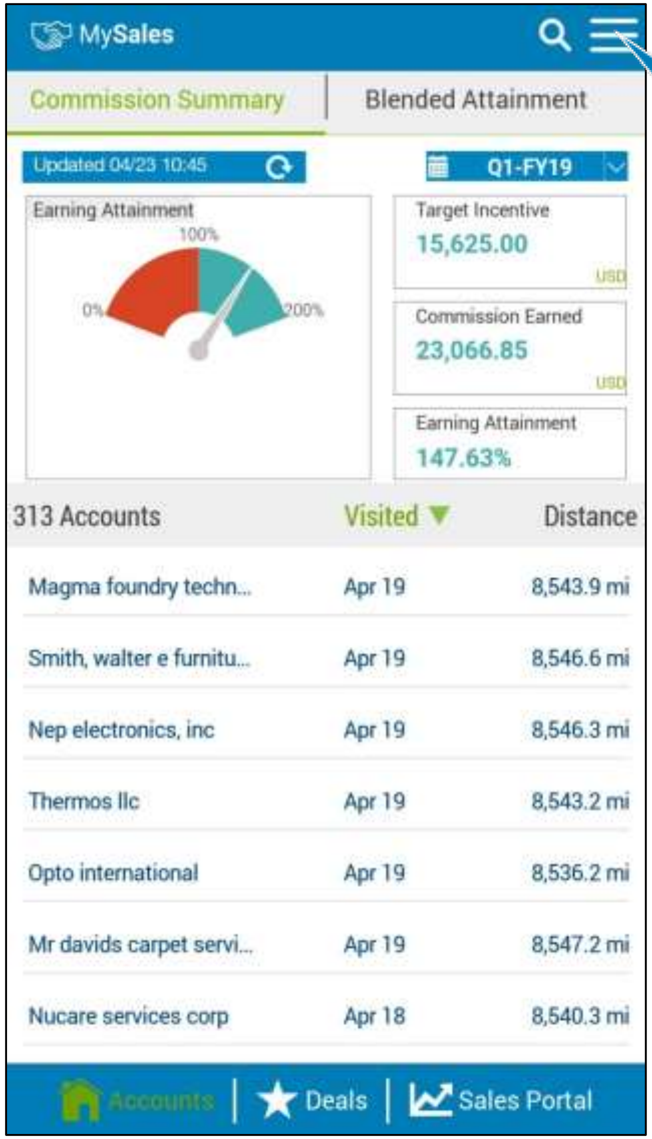
Feedback/Logout



Click to view flyout menu to Logout or submit Feedback on the app

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Internal Use - Confidential

Global SFDC & Mobile SF1 Survey

August – October 2017

Global SFDC/SF1 Survey (Oct 2017)

- A global SFDC/Mobile SF1 survey was conducted from August to October 2017 with 1000 Sales Reps, Manager/Directors, and Account Executives from EMEA, APJ, NA, and LATAM
  - Demographics,
  - Customer Metrics (Ease of Use, NPS, CSAT),
  - Process/ Feature improvements (Verbatim)
  - Salesforce1 Mobile App
- Details about the survey:
  - Response rate: 11.8%
  - Margin of Error: +/- 2.91% [Statistically-significant]
  - Countries participating: 56 (US = 36.4%, China = 12.6%, Japan = 7.8%, Germany = 5.6%, France 3.8%, India = 3.8%, UK = 3.1%, Canada = 2.4%, Other = 24.7% [48 countries])
- Link: http://intranet.dell.com/marketing/global_online/gsd/Research%20Projects1/SalesforceWW-Survey-10182017-FINAL.pdf

As a SF1 Mobile User, I need…

- **Contact Management** that enables me to create, edit, and update customer records when I'm on the road or at a customer's office.
- **Look-ups & Searches** that are easy and available during offline times when my data connection may not be up and running, so that I can conduct my business when at a customer's location.
- **Trip reporting** that can be done relatively easy and in real time.
- **Reduced distractors** such as news feeds or other irrelevant information that clutters up my limited screen real estate.
- **Most important features at top of screen** so that I'm able to see important information without needing to scroll through too many pages.
- **Limited Functionality** (but with ability to unlock more extensive features) since I don't really use the mobile app for more than a handful of cases

As a SFDC User, I need…

- **Better training** so that I understand existing core functionality and existing training options.
- **Role-Based Customization** to find important information without scrolling, restrict editors (esp. territory & account planning), use simplified templates and lessen the burden of manual input of fields (esp. trip reporting).
- **Improved Visibility** on who owns which accounts, POCs, account and order sales histories, verticals, and overviews of parent and child accounting.
- **Cleaner Data** from partner and EMC teams so that I don't spend my sales time performing data clean-up of information that I have no access to or know of its context.
- **Interoperable tools** that are smart enough to populate fields I've already entered elsewhere, to make associations for me, and to enable me to use SFDC as it was intended.
- **Efficient Request Process** that is timely and reduces my cognitive overhead, esp. around manual input and options for support and change requests.

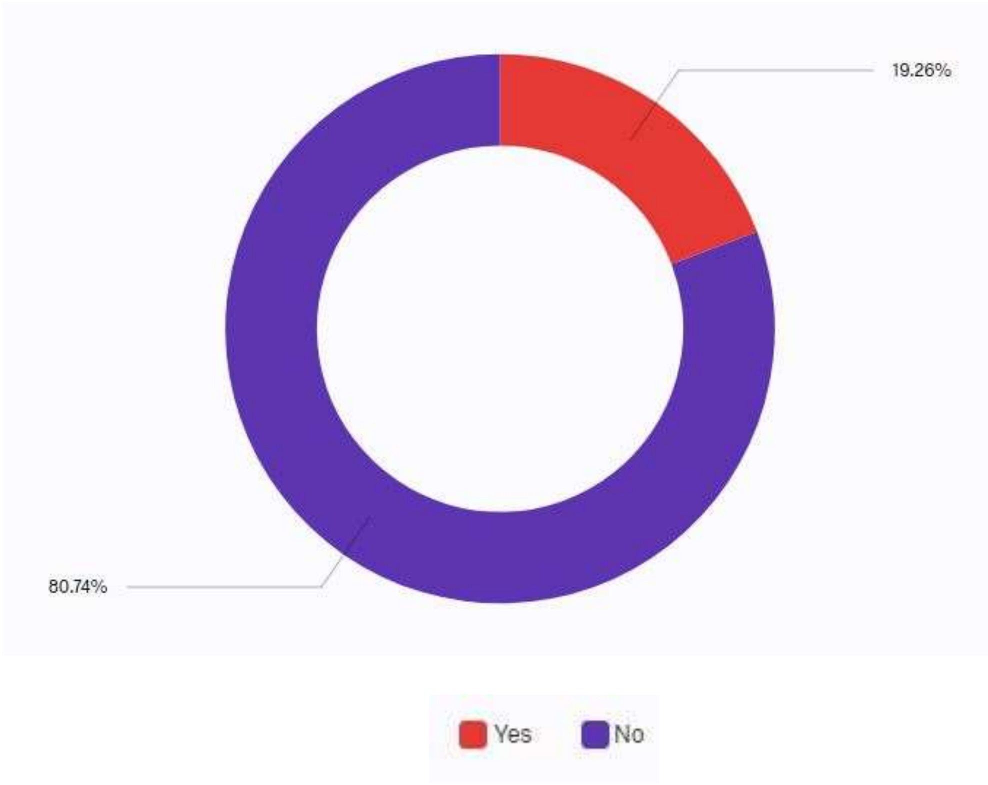
Based on direct feedback of 389 SFDC users globally for the question: "What Salesforce.com features do you want fixed or improved?" [More Details]

Survey Summary – SFDC & SF1

- **Tracking and pipeline management** were the chief rationale for using SFDC.
- **Biggest pain points for daily SFDC users**, besides performance, was lack of intuitive navigation (49.5%), intermittent error messaging (48.3%), and too much functionality (43.8%) – of which 50.3% occurred at least 2 or more times monthly.
- **Highest regional satisfaction** was in LATAM; NA least satisfied.
- **Chief delighter** was Opportunity & Pipeline Management (70.8%, NPS 5.14).
- **Features with most dissatisfaction**, besides performance and mobile app, were Account and contact objects (21.8% NPS 4.7), Navigation (21.2, NPS 4.7), Collaboration (18.6%, NPS 4.6).
- **Biggest mobile pain point** (about 20% of users) was exposing too much feature functionality which affected on-the-go performance.

Usage of SF1 Mobile App N=784

Q24 - Do you use Salesforce1? (Mobile App)

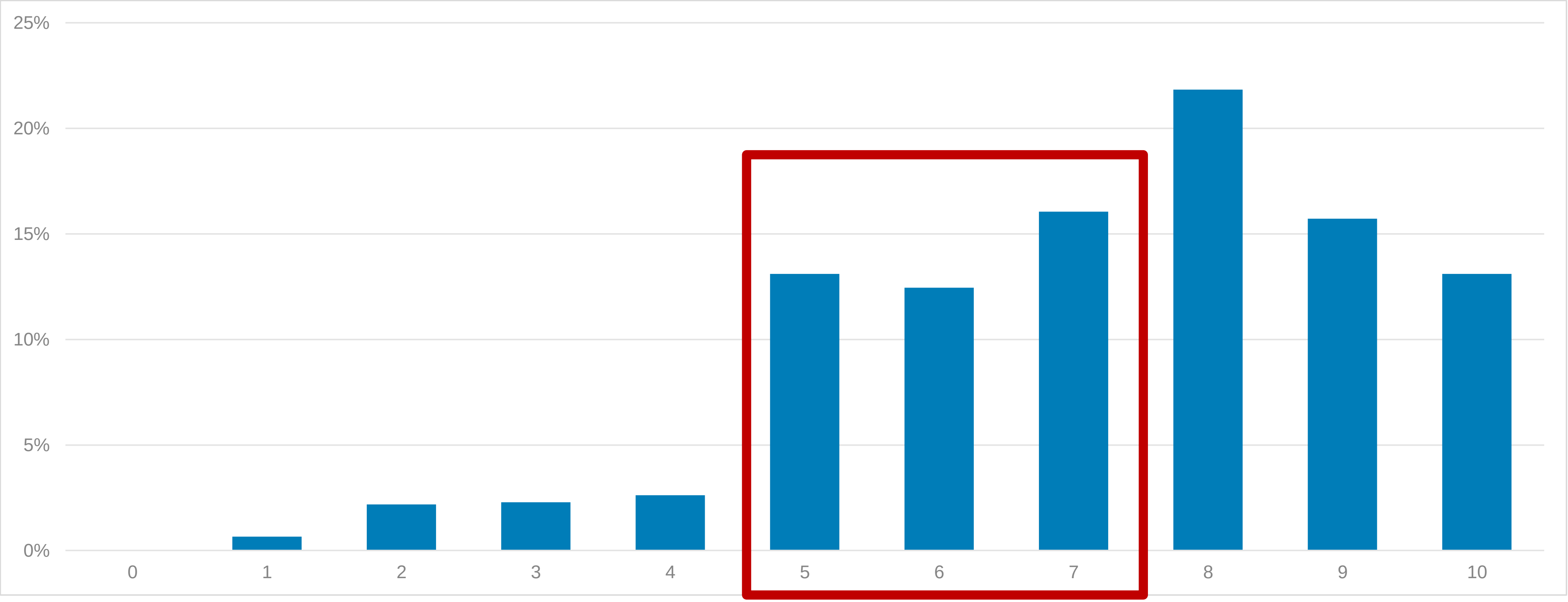


Fewer than 20% of respondents used the mobile app

SF1 Mobile App Satisfaction – Global

N=150
Mobile Users

Q25 - How satisfied are you with SalesForce1 (SFDC Mobile App)?



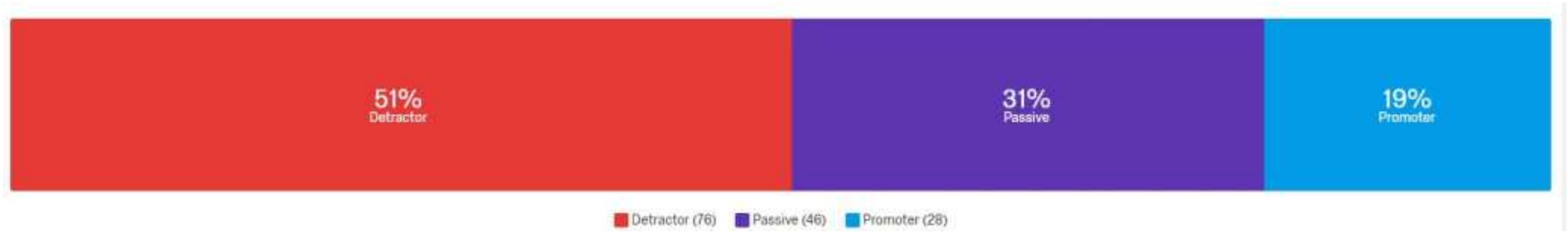
Field	Median	Mean	Std Deviation	Variance	Count
Mobile App Satisfaction (Global)	6.0	6.1	2.6	6.8	150

A large global segment of dissatisfaction exists for the Salesforce1 app

SF1 Mobile App Satisfaction (NPS) – Global

N=150
Mobile Users

Q25 - How satisfied are you with SalesForce1 (SFDC Mobile App)?

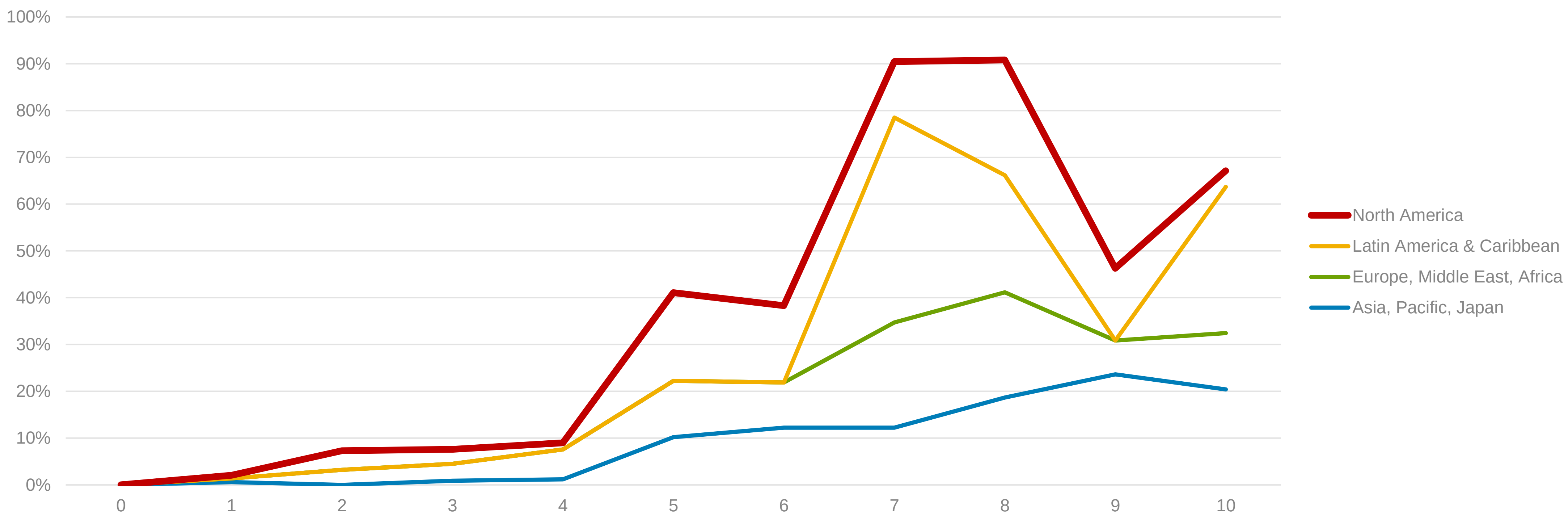


There are 32% more detractors than promoters of the Salesforce1 Mobile App

SF1 Mobile App Satisfaction – By Region

N=150
Mobile Users

Q25 - How satisfied are you with SalesForce1 (SFDC Mobile App)?



Comparative graph is scaled as a percentage using respective per-region data only

Field	Median	Mean	Std Deviation	Variance	Count
Mobile App Satisfaction (Global)	6.0	6.1	2.6	6.8	150

Largest group of regional dissatisfaction was found in North America

Improving SF1 Salesforce App

N=79
Mobile Users

Q26 - Do you have any suggestions on how to improve SalesForce1 Mobile app? (Optional)

- **Limit App To Narrow Use Cases**
  - #1: Contact Management: Create, edit, update customer records
  - #2: Look-ups & Search: Name, Phone number, address, opportunities
  - #3: Trip Report Management: Create, edit, update
  - #4: Calendar integration: Appointments
- Improve Web App Performance (Or Develop A Native Mobile App)
- Reduce Scrolling & Promote Core Functions To Top Of Screen
- Remove Irrelevant Distractors (Newsfeed)
- Allow Users To Expose An “Expert-mode” UI (Show All Features)

DELL