# Discovery stage (UX/UI) for a CRM project

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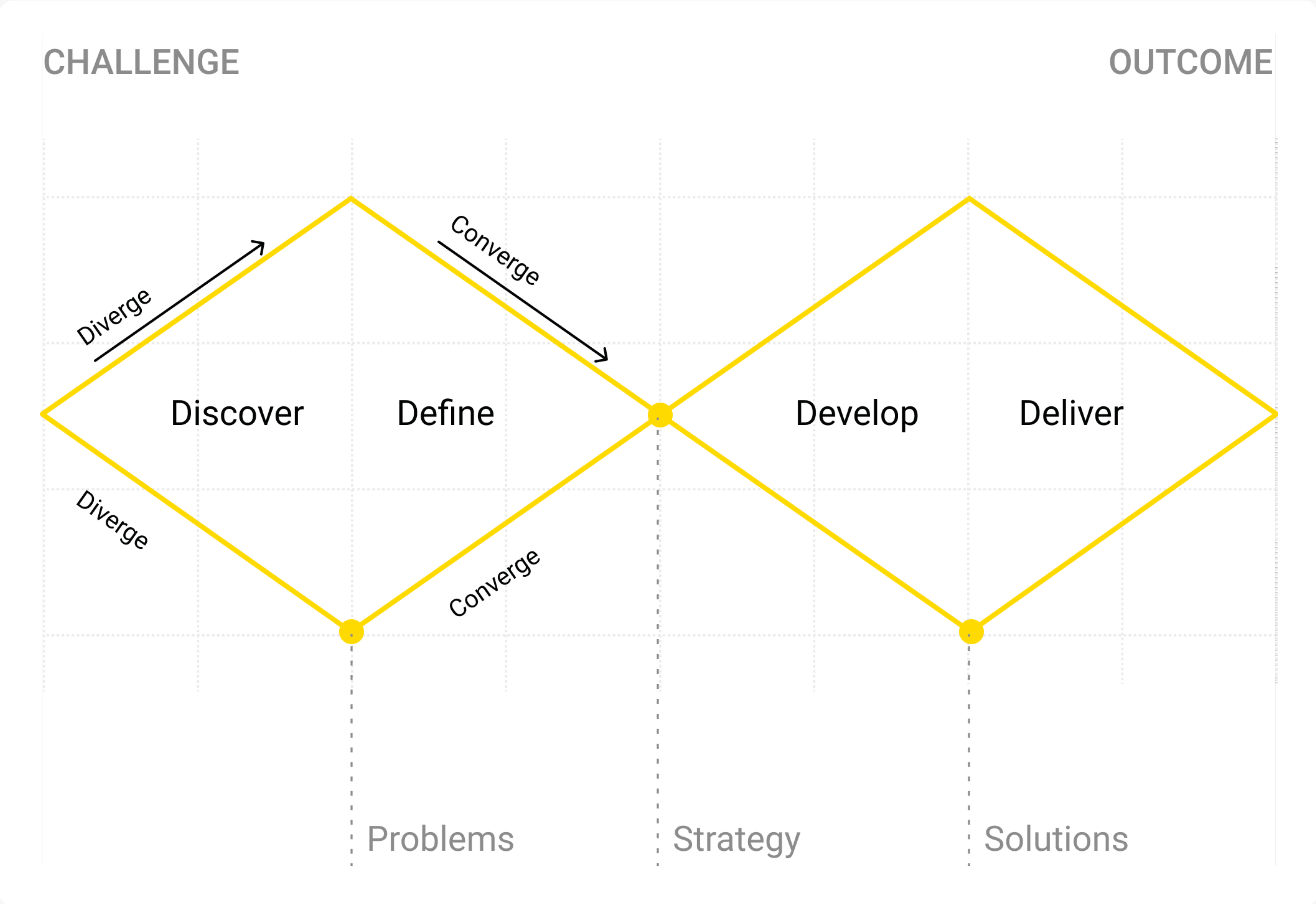
# Table of contents

# Brief

The customer contacted Andersen to develop a tailored software solution, i.e. a CRM system for the HR industry. The main requirement was to obtain a product that would allow recruitment agencies to manage hiring processes based on requests for specialists working in different fields. In addition, the resulting solution was intended to manage human resources within the company.

As for the purpose of this very discovery phase, it was all about identifying answers to the questions. First, what is the main task of the envisioned IT product? What user issues would it resolve? How should it look and which criteria should it match?

This information would make it possible to generate an overall interface concept and future capabilities.



# Stakeholder interview

The first crucial stage was to define the essence of the envisioned IT solution, scrutinize its industry landscape, and analyze its competitors and target audience. On top of that, the key mission of the product was also to be clarified. To achieve that, a deep interview session with the customer was held. During it, the customer side communicated their vision of the future tool.

## 2.1 Business requirements

- The system should provide its admins working at different corporate levels with convenient access to data on requests for specialists.
- The tool should be capable of effectively integrating data from the Salesforce solutions and other software.
- The solution should make it possible to change the statuses of potential and current employees.
- The system should feature custom-build data analytics capabilities based on the business needs of a particular client.
- The tool should offer varying access levels to different categories of employees.
- Finally, the solution should give its users tech means to set goals and monitor their progress.

## 2.2 Audience description

- In this customer's case, their target audience encompasses middle-and-large-sized businesses with sophisticated corporate staff structures.
- As for the future end-users of the resulting solution, they include admins working at varying corporate levels with different roles and rights, as well as HR professionals and relationship managers.

## 2.3 Revenue model

As an outcome of the IT project, the customer is expected to generate revenue by selling and setting up the resulting CRM system.

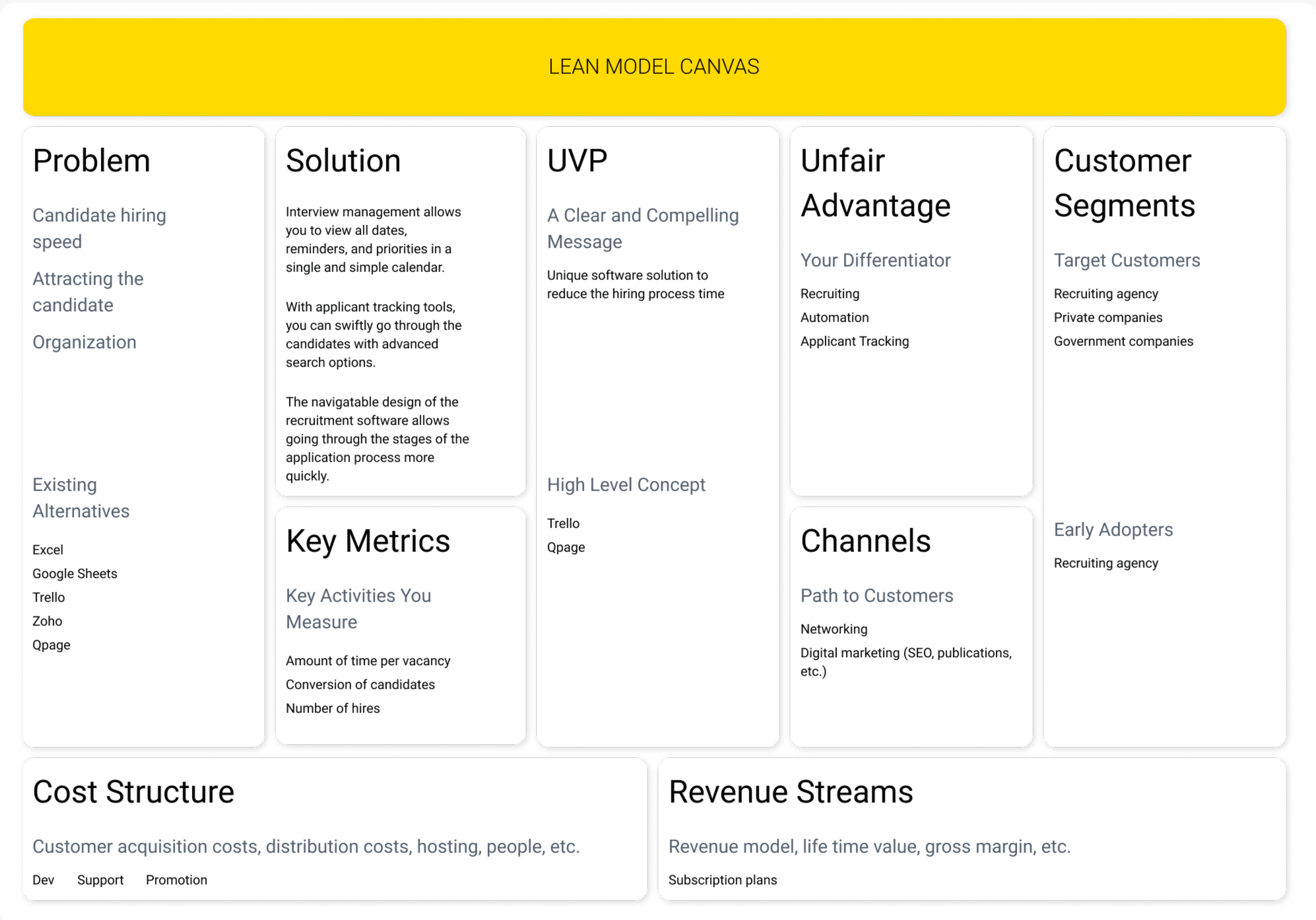
The clients working with the customer, i.e. small-and-large-sized businesses, will apply the resulting IT solution as a product for their internal corporate use. Hence, the CRM system will not generate direct revenues per se.

However, with such a CRM system at their disposal, these businesses will boost the work efficiency of their management. The overall economic efficiency of those businesses as a whole is also to increase owing to better HR management.

An initial round of communication with the customer can only produce an approximate specification of the IT product idea. Therefore, it is also necessary to thoroughly analyze other existing solutions with a proper emphasis on the target audience.

## 3.1 Analysis of existing solutions and Lean Model Canvas

After the first round of communication with the customer had been accomplished, Andersen's team conducted research on the existing analogs and competitors. Based on this study, our group created a Lean Model Canvas reflecting our comprehensive project vision. This conceptual description of the IT initiative helped clarify all the points and elements. As a result, we managed to put all irrelevant and unnecessary hypotheses aside right at the discovery stage. That enabled us to minimize the number of changes during the subsequent development process.

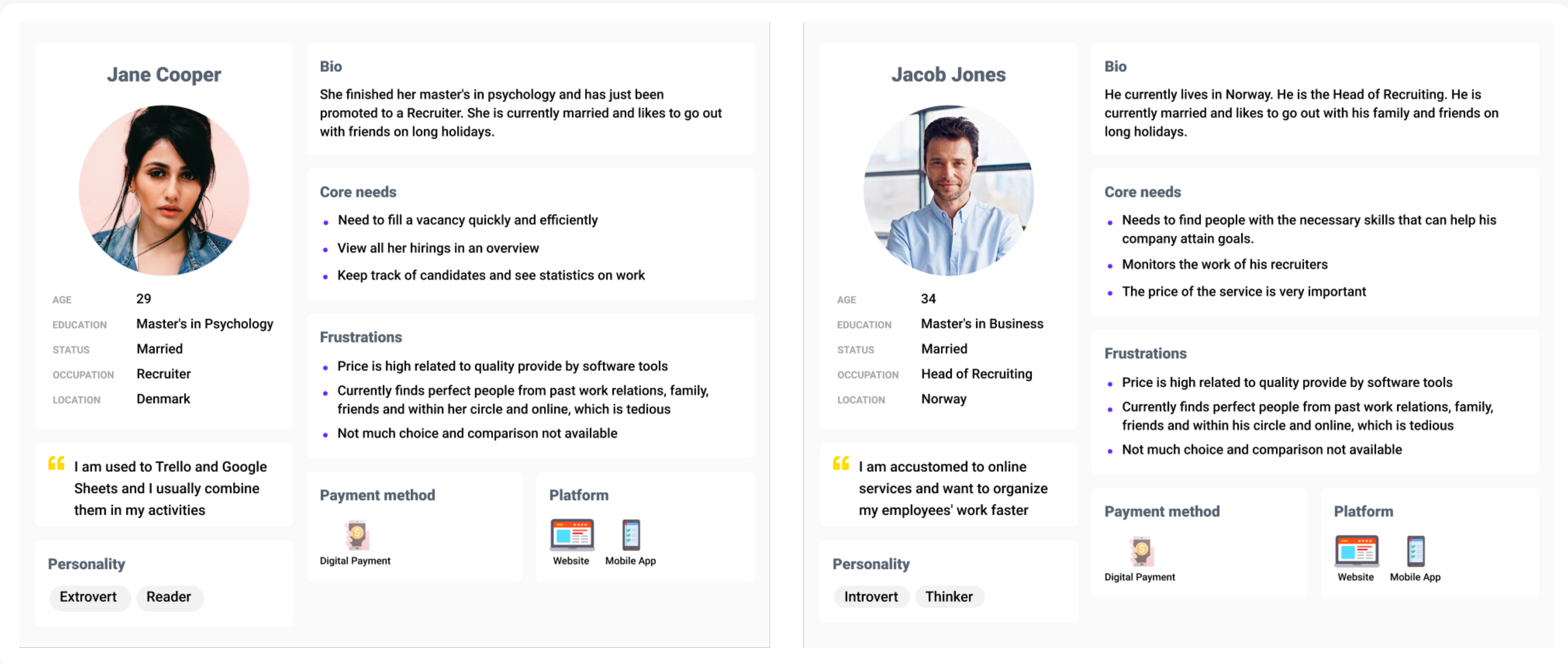


## 3.2 Creating personas

The basis of our analysis was constituted by the following obvious assumption: this tool presupposed certain roles, i.e. particular users interested in using such a platform. Thus, have generated two marketing personas occupying those key roles.

Each persona is an approximated portrait representing one of the target audience groups. Hence, it is not a fictional character; rather, it is a generalized portrait of many users analyzed by our examination of the target audience.

The persona-based approach enhances empathy related to the needs of the target audience within the development team. It also helps to highlight the goals, features, and pain points of various segments of the target audience.

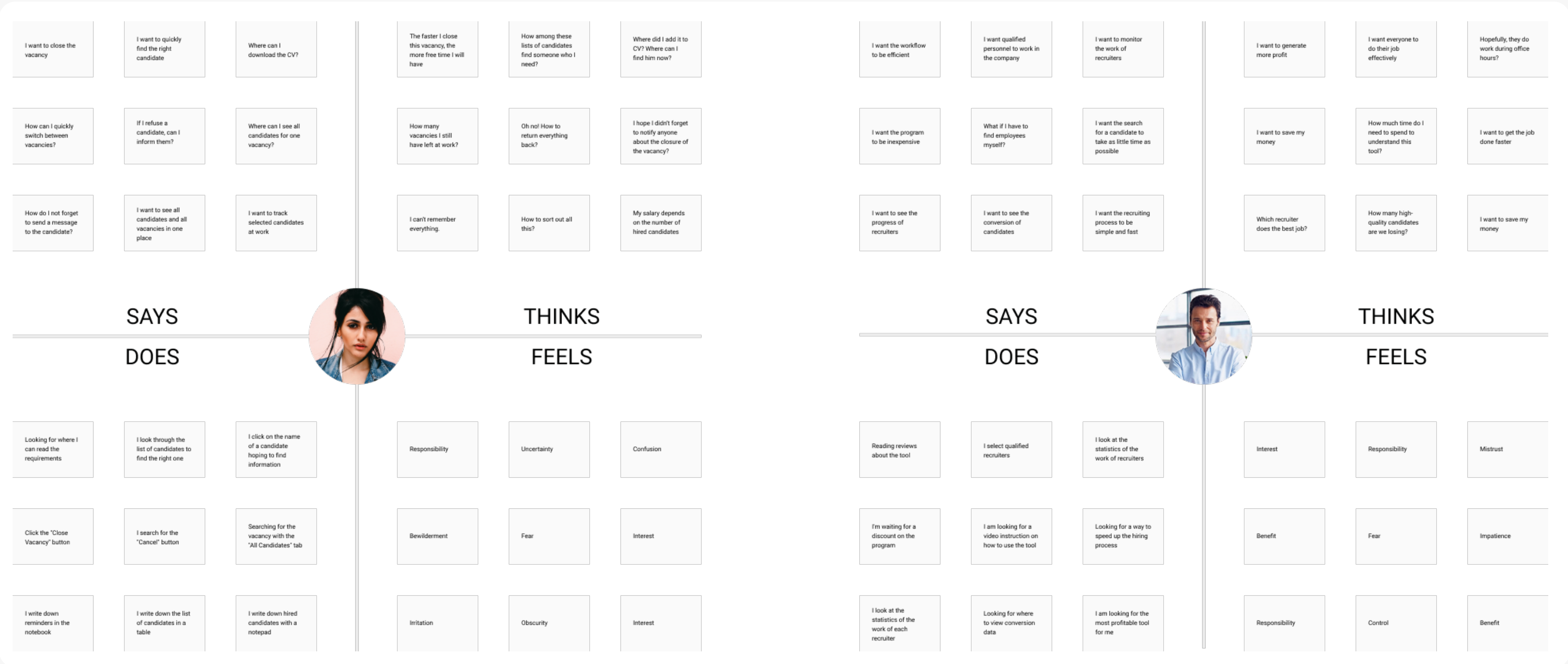


## 3.3 User testing of the most popular competitor’s system

To understand a user, it is crucial not only to comprehend who they are. One also needs to know how they act and what they experience while interacting with a particular system.

When applying Canvas, we identified some key user roles. For 2 of them, we conducted a more thorough study. As a result, two marketing personas were generated on the basis of the research. With full consideration taken of the needs of those people, we created a script for each of these user groups of users. This script was later executed with the system provided by the customer's most prominent competitor.

That enabled us to highlight the strengths and weaknesses of that top system. We also shed more light on the pain points users pay attention to.



## 3.4 Creating a User Journey Map

To avoid missing any relevant and important points, we immersed deeper into what end-users felt, experienced, and assumed. That is why, for the marketing personas, we created a detailed scenario of interaction with the system during the working day.

This User Journey Map includes steps, channels, needs, fears, and obstacles, as well as a call to action. Jacob's UJM is represented below.

| | LIST WITH ALL VACANCIES | CHOOSING A SINGLE VACANCY | ADDING A NEW CANDIDATE | SCHEDULING INTERVIEWS | ADMITTING AND ONBOARDING A CANDIDATE |
|---|---|---|---|---|---|
| Goal | Finding the needed vacancy on the overall list of my vacancies | Viewing all needed vacancy-related data | Quickly adding a candidate to a relevant vacancy. | Setting reminders about scheduled interviews and holding them on time | Processing the candidate towards the "Hired" stage |
| Expectation | The page will display a complete list of open and closed vacancies | The area to click on the vacancy will open a window containing all the information on it | There will be the "Add candidate" button | There will be a button to create an event with a candidate and a capability to set a reminder | Each candidate profile card will feature a button for transfer them to the next stage |
| Way | We open the "Vacancies" tab, choose filters, click "Apply filters", and see the list | We click on a chosen vacancy and proceed to the page with detailed information | We click on the "Add candidate" button, enter the needed data, and attach a CV | We lick on the "Create an event" button, select its type, date, and reminder-related details | We click the "Transfer" button to the candidate to another stage and select a needed one from the list |
| Fears | What if I don't find the vacancy I need on the list of vacancies? What if this search takes me too much time? | What if the information regarding the vacancy has changed? How do I know how many candidates are applying for it? | What if I've entered incorrect data? What if this candidate is already in our base of candidates? | How can I avoid forgetting about this candidate? How to remind the interviewer about them? | What if I reject the candidate and click on the corresponding button and then want to reintroduce them into the recruitment process? |
| Solution | Introduce pagination and filtering capabilities. Separate open vacancies from closed ones with tabs | Add the capability to edit vacancies. Display all candidates attached to a particular vacancy | When data is entered, indicate errors and stress if the candidate with such properties and attributes already exists in the database | Add reminder settings and a button capable of attaching another person to a scheduled event | Display "Rejected" and "Accepted" in separate tabs and add the capability to reintroduce candidates |

# Wireframing

With all the aforementioned data at our disposal, we proceeded with the wireframing stage. As you can see, each wireframe offers the very functionalities previously identified. Matching the needs and expectations of the target audience was our top priority.

# Design concept

Below, you can see a concept of how the envisioned system might look like. As you can see, it is easily navigatable, informative, and intuitive, with everything properly arranged in its place.

On top of that, Andersen's team also submitted an estimate for the future price and time required to build the system. Please, see other attached documents to learn more.