

ascentium

PREPARED FOR

CLIENT NAME

Preliminary User Research & Information Architecture

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Agenda

- Review of user research and IA process
- Preliminary findings
- The users
 - ▶ The Store Owner
 - ▶ The Product Buyer
 - ▶ The Parts Buyer
 - ▶ The Servicer
 - ▶ The Accountant
- Preliminary Wireframes

Review of user research & IA process

- Gather business requirements (done)
- Interview users (done)
- Task analysis (draft)
 - ▶ What users need to do
 - ▶ How they do it
 - ▶ Why they do it
- Usability evaluation (draft)
 - ▶ How well the current site works to support the tasks
 - ▶ How it could be improved
- User flow/Site map
- Wireframes

Preliminary findings

- **Most users were satisfied with the feature set available on SITE NAME.com, with some notable exceptions:**
 - ▶ **The lack of complete invoice information**
 - ▶ **The inability to obtain or print copies of official documents online (invoices, credit memos, etc) – some resort to taking screenshots, while others call CLIENT NAME to have copies of documents faxed or mailed in.**
 - ▶ **The lack of cross-referenced, collocated information – inventory info separate from order status info, separate from account history info.**
 - ▶ **The inability to generate date-filtered reports for forecasting or account reconciliation purposes.**
 - ▶ **Some users were unaware of the full feature set SITE NAME.com could provide, wishing for features that their account was not set up to display.**
- **Users had few issues with the layout of most screens, but better placement of certain links and buttons could enhance their efficiency in the tool.**
- **The tasks and labeling were, for the most part, found to be satisfactory, with the exception of the help section.**
- **Users found the screen layout, writing, and structure of the help section to be confusing and of little relevance to them.**

The users:

- The Store Owner
- The Product Buyer
- The Parts Buyer
- The Servicer
- The Accountant

The Store Owner

- ▶ **Small business owner (Mom & Pop)**
- ▶ **Manages a small staff of salespeople**
- ▶ **Uses SITE NAME.com rarely:**
 - Not useful
 - Doesn't have information or services he needs
- ▶ **Handles nearly all ordering, marketing, bookkeeping, IT, and store management**
- ▶ **Currently orders products (finished goods) via phone or fax**
- ▶ **Reconciles internal inventory with SITE NAME.com order status**
- ▶ **Reviews account history to forecast how much to buy**
- ▶ **Would like to be able to:**
 - Go to one site to get marketing materials, product manuals, part & product numbers
 - Purchase products online
 - View full invoices online
 - Generate date-filtered reports of account history

The Product Buyer

- ▶ Works in back room of dealer that has 15 salespeople
- ▶ Uses SITE NAME about once a week, depending on demand
- ▶ Currently orders products (finished goods) via fax
- ▶ Checks on status of orders
- ▶ Reconciles internal inventory with SITE NAME.com order status
- ▶ Ensures that products in stock are at optimal level
- ▶ Reviews account history to forecast how much to buy
- ▶ Would like to be able to:
 - Purchase products online
 - View full invoices online
 - Generate date-filtered reports of account history

The Parts Buyer

- ▶ Works in service department in central offices of national service dealer
- ▶ Uses SITE NAME several times daily as part of daily routine
- ▶ Receives orders for parts from service personnel
- ▶ Ensures that parts in stock are at commensurate with demand
- ▶ Checks on pricing and inventory availability
- ▶ Tracks shipping of parts to ensure they arrive on time
- ▶ Would like to be able to:
 - Batch-order parts using a shopping cart-like interface
 - View all invoice and order details on one screen, minimizing extra clicks
 - Generate date-filtered reports:
 - Open orders
 - Shipping report (what has shipped in the previous X days)
 - Outstanding core charges
 - Orders by part number

The Servicer

- ▶ **Work in research department in central office of a large national service dealer**
- ▶ **Uses SITE NAME.com 3-4 times a day.**
- ▶ **Order specific parts (circuit boards) for limited set of products**
- ▶ **Provide advanced troubleshooting assistance to technical support personnel**
- ▶ **Look up schematics to find part numbers**
- ▶ **Download updated service manuals**
- ▶ **Would like to be able to:**
 - **Navigate more efficiently**
 - **Revise entries in the ordering process**
 - **Auto-fill and auto-correct billing and address information**
 - **Look up schematics faster**
 - **Cross-reference part numbers with compatible models**

The Accountant

- ▶ **Works in accounting department of medium-sized dealer**
- ▶ **Uses SITE NAME.com 1-2 times a week. More often during reconciliation time.**
- ▶ **Conducts monthly audits, reconciles accounts**
 - Prints reports of open items
 - Compares internal accounting with open items in SITE NAME.com
 - Checks for discrepancies and investigates cause by requesting more information from CLIENT NAME
 - Requests invoices to be emailed or faxed, since SITE NAME.com does not provide
- ▶ **Ensures that payments go through**
- ▶ **Checks that credits are applied to payments & check numbers match internal records**
- ▶ **Would like to be able to:**
 - Generate cash flow and projection reports
 - View invoices online and print hard copies
 - See more detailed information on "Info" pages
 - See sum of credits on the Account Summary page
 - View category information alongside dollar amounts
 - Date-filtered view of Account History

Wireframes