

# VERB Technologies

**CRM: Sampling Product Feature**

**Amy Ehlers: UX Product Design Lead**

## About the Company

VERB provides next-generation CRM lead generation, and video marketing software applications to sales-based organizations

- The SaaS products are cloud-based, accessible on all mobile and desktop devices, and are available by subscription for individual and enterprise users.
- 60 countries and in 20 languages
- 103 global clients and 1.93 million total user downloads

## The Challenge - Improve Sampling

Beyond bug fixes and the occasional feature enhancement, the sampling process hadn't been thoroughly reviewed in years. Sampling is a key component in converting prospects into customers for several of our top clients, and they were growing frustrated with an outdated, overly complicated process.

I was crowned the “Queen of Sampling” and asked to uncover ways to improve the process by applying UX design methodologies through:

- Stakeholder and client interviews
- Heuristic reviews
- User flows
- Analyzing existing data in Tableau
- Conducting a survey
- Wireframes
- Iterative design sessions
- Sketch designs
- Simple interactive prototypes
- Usability testing





# Heuristic Reviews

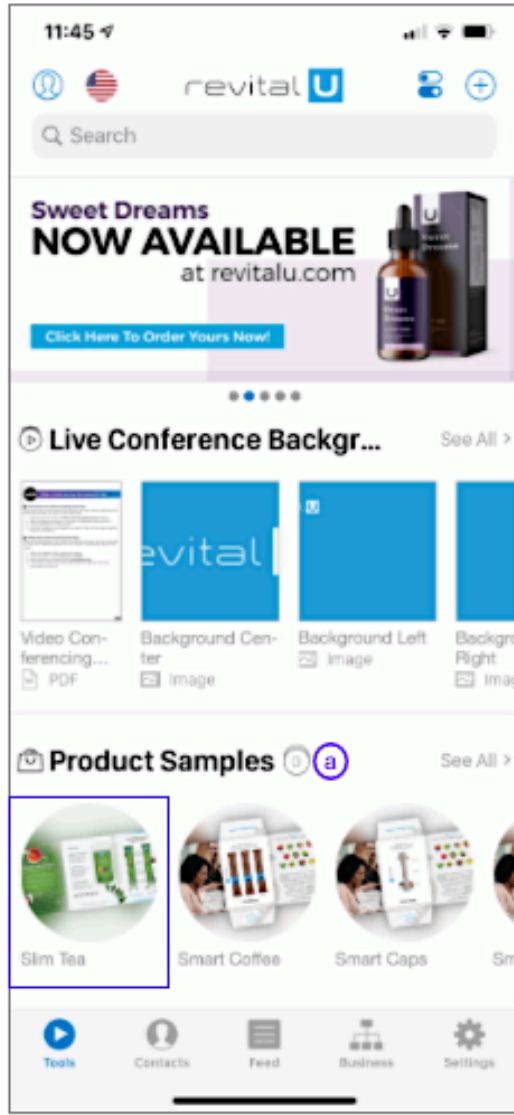
[https://qgvauj.axshare.com/#id=wmztl1&p=purchase\\_credit&g=1](https://qgvauj.axshare.com/#id=wmztl1&p=purchase_credit&g=1)

I conducted the review through the eyes of a new distributor trying to achieve the following goals:

- Mailing samples directly to prospects (no charge to prospect).
- Sharing a sample website link so the prospect can order the sample (prospect pays S&H).
- Requesting a new prospects shipping information so they can mail a sample (no charge to prospect).
- Assigning follow-up emails when a product sample was given in person.

## Key Takeaways

- Task flows with avoidable dead ends.
- Confusion about the use of credits when paying for samples.
- Different payment processes for certain clients
- Social media sharing is overly complicated.



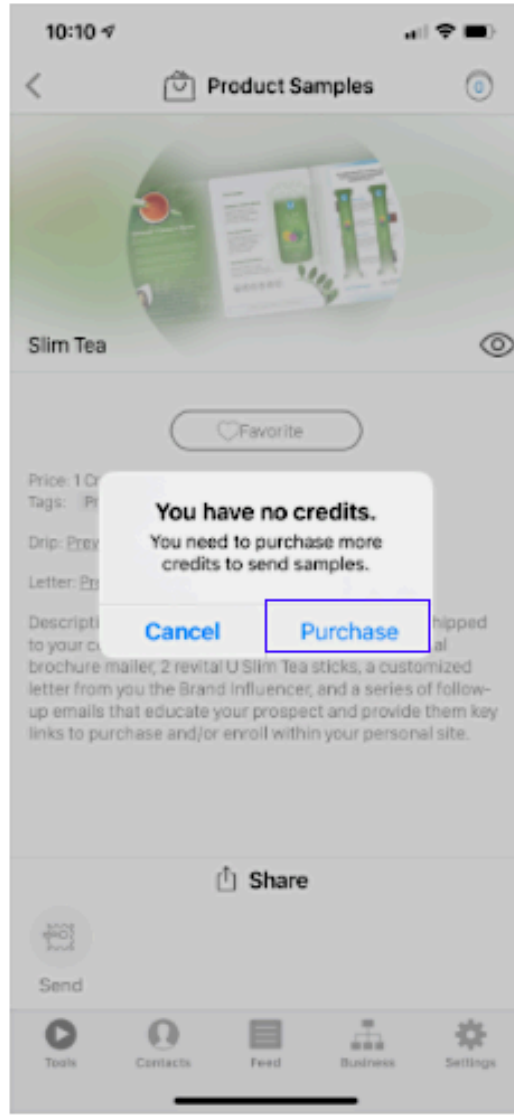
Tap Sample

Ⓐ I didn't notice the credit symbol



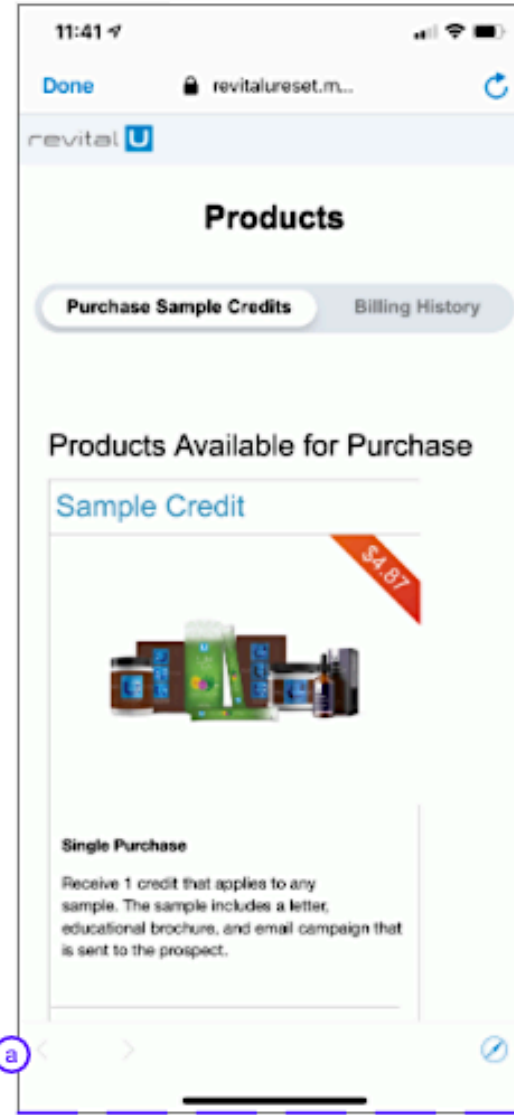
Tap Share

• Drip link Preview



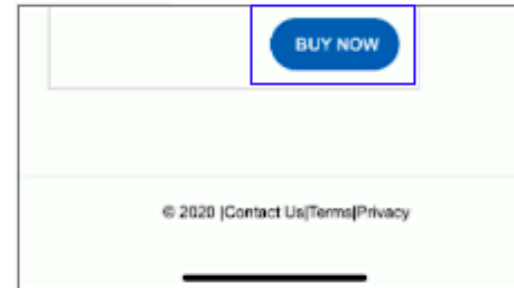
Tap Purchase

Takes you to Desktop - <https://revitalureset.mysecureoffice.com/amyehlers/admin/products/index#available>

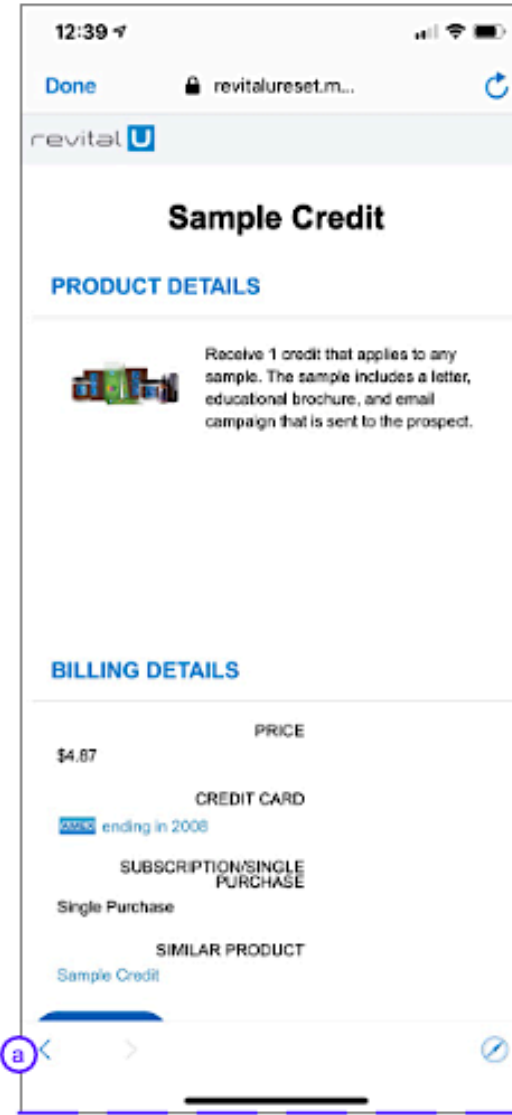


Tap BUY NOW

Ⓐ < > (my secure office link) are obscuring the BUY NOW button

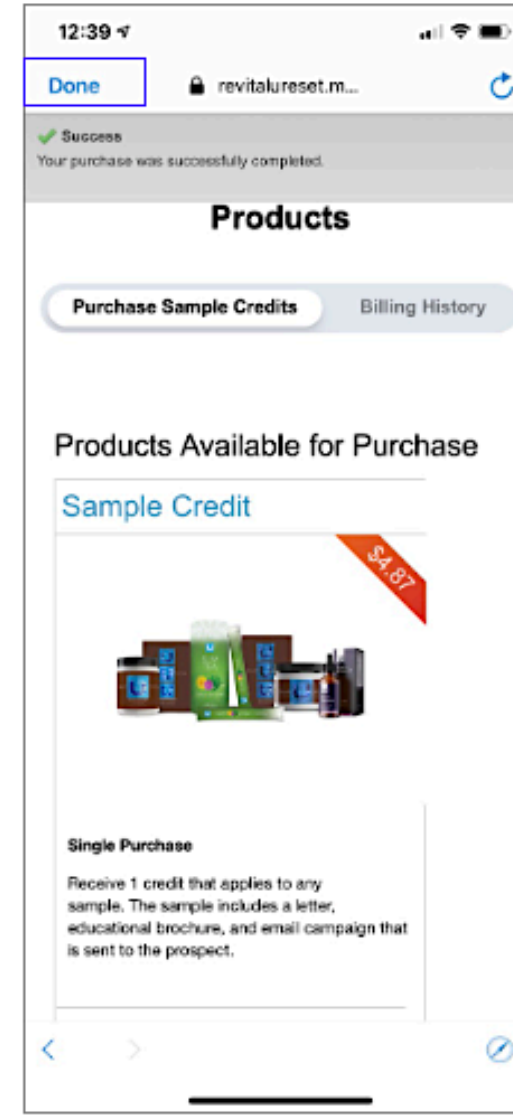
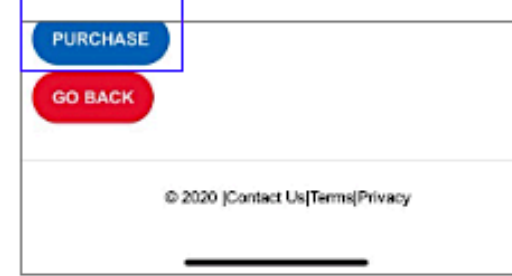


Takes you to Desktop - Profile / Billing <https://revitalureset.mysecureoffice.com/amyehlers/admin/profile#billing>



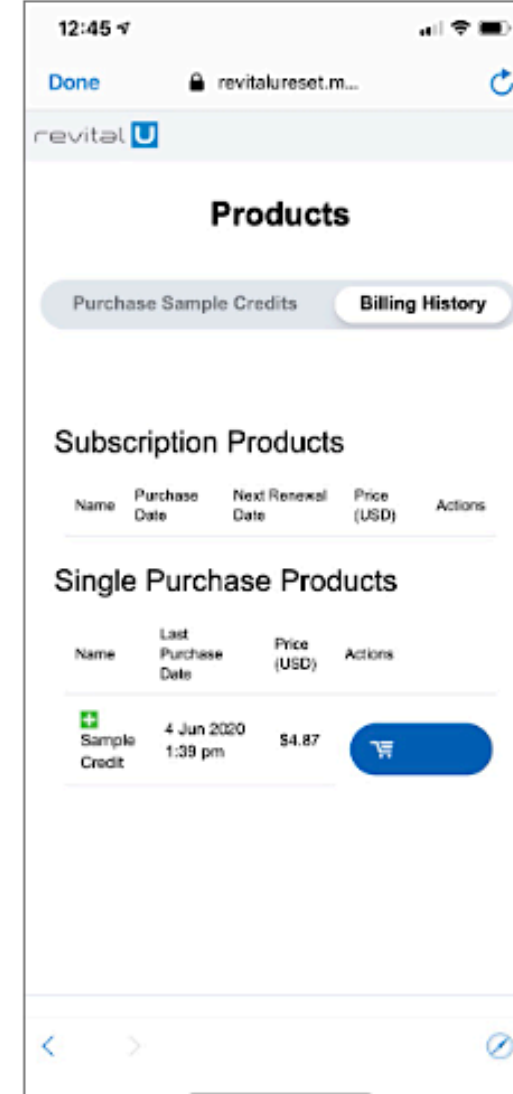
Tap PURCHASE

• < > (my secure office link) are obscuring the PURCHASE button



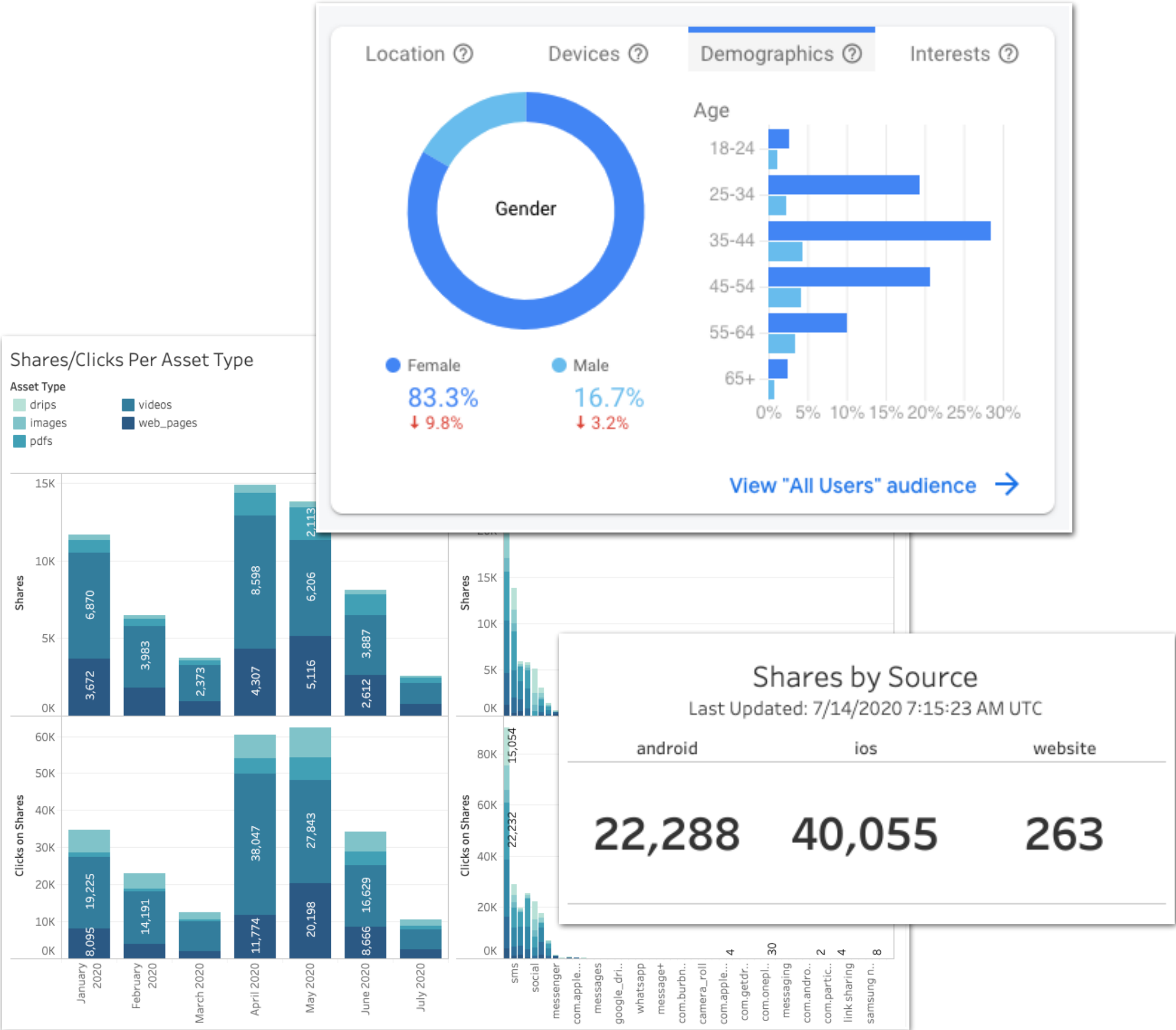
Receive "Success message" Tap Done

• I felt like I was at a dead end until I realized I could tap Done at the top. Break location of CTA workflow



# Analytics

While the majority of our data was designed for our clients to track distributor’s sales performance, I was still able to get some clues into our users’ use of sample sharing. The data answered some “how” questions but didn’t address the “why.”



# Stakeholder Interviews

I conducted multiple interviews over Zoom and Q & A documentation in Confluence with our internal stakeholders.

- McKinley Oswald, President of Global Sales
- Jason Matheny, COO
- Matt Tenney - Special Projects Lead
- David Litt, VP of Digital Strategy at Elepreneurs

Our sales executives were reluctant to allow me access to some of our top distributors, so I provided them with a series of questions and asked that they record the sessions.

## Key Takeaways

- Stripe is our mobile payment system. CBD products must be run through the back-office using [Authorize.net](#).
- Credits are the only method by which a user can “purchase” a sample. If a client has 1 sample that is CBD, even if they have other non-CBD samples, all of their “purchases” must be made with credit.
- Not all of our sample clients use credits in the app with users.





# Survey

I created the survey in Survey Monkey and sent it through the in-app Announcements.

The survey aimed to understand better how distributors share sample pages, assign email drip campaigns, and send product samples.

The goal was to improve the process so that they can achieve even greater success.

- Clients Surveyed: Elepreneurs , Amare, Neora, Thrive
- 36 Questions
- 836 respondents

### Key Takeaways

- 59% of Respondents found sending samples to be the most successful method of converting prospects into customers.
- 20% of Respondents found sharing a sample page to be the most successful method of converting prospects into customers.
- 9% of respondents found adding a prospect to an email drip campaign to be the most successful method of converting prospects into customers.

I created a report based on the survey data for our top sampling client. [http://amyehlersdesign.com/Elepreneurs\\_Sampling\\_Survey\\_Results.pdf](http://amyehlersdesign.com/Elepreneurs_Sampling_Survey_Results.pdf)

Sending Samples

59% of Respondents found **sending samples** to be the **most successful** method of converting prospects into customers.

Most respondents **check the status of your product sample frequently**

How often do you send a sample to **multiple recipients?**

Never - 42%  
Rarely - 24%  
Sometimes - 24%  
Frequently - 9%

**Positive Responses**

*"People are more likely to try something if they don't have to pay for it."*

*"Once they experience it, they love it."*

*"Love it. It's automated and good information sent with the product."*

*"They get samples at their home with information they can look over in their own time."*

Room for improvement.

*"Being able to track more accurately so I can Follow up better. Have had multiple occasions in which they received their sample before I was Alerted."*

*"I would love to be able to track the sample so I can keep my customer updated."*

*"Send a shipment tracker to customer."*

*"Notify us if a sample has been canceled because the app cannot send to the person again."*

Would it be useful to select from a **group of recipients** in your contacts when sending a product sample?

Yes - 50%  
No - 11%  
No Opinion - 39%

**Negative Responses**

*"Love the mailers they go in but takes too long and that is why I don't use the app much."*

*"Have samples of all the products ..... particularly both teas."*

*"Make all beverages available."*

*"Include more products."*

Would it be useful to choose from **more than one credit card** when

What could this mean?

The current mobile process of sending samples to multiple recipients is tedious and limited.

Adding a Prospect to an Email Drip Campaign

9% of respondents found **adding a prospect to an email drip campaign** to be the **most successful** method of converting prospects into customers.

Would it be valuable to have the option of **selecting a group of recipients** for a sample drip campaign?

Yes	60%
No Opinion	5%
No	35%

Currently, you must add a prospect to your Contacts before sending them an Email sample drip campaign. Would it be valuable to **just enter an email?**

Yes - 87% No - 2% No Opinion - 11%

*"If I could send an email to a prospect first and then add the contact info to my Contacts, that would help my work-flow. When I have to stop and enter the contact information first, I often forget what I wanted to type in the email to the prospect."*

**Positive Responses**

*"I like drip campaigns, it's great that you do that. I found them hard to create my own vs using something like mailchimp."*

*I am loving all the improvements already made- you make it very easy and pretty seamless to send out products."*

How often do you change the **start date of the sample drip campaign?**

Never - 68%  
Rarely - 19%  
Sometimes- 12%

How often do you hand out **samples to a group of prospects?**

Always	2%
Sometimes	40%
Rarely	25%
Never	33%

**Negative Responses**

*"I would like more training on these drip campaigns."*

*"I do not use this. I leverage my posts and personal contact."*

*"Most people don't open their emails, or they end up as spam."*

*"I just don't see the point in adding them after they receive the product ."*

How often do you change the **email that's sent first?**

Never - 68%  
Rarely - 17%  
Sometimes- 12%

Could this be skewed?

Could the last six months of shut-downs and social distancing alter these results?

*"For the past four months I've rarely shared a sample in person."*

# User / Job Stories

I often combine user stories and job stores.

User Story: As a (type of user), I want (some goal) so that (some reason).

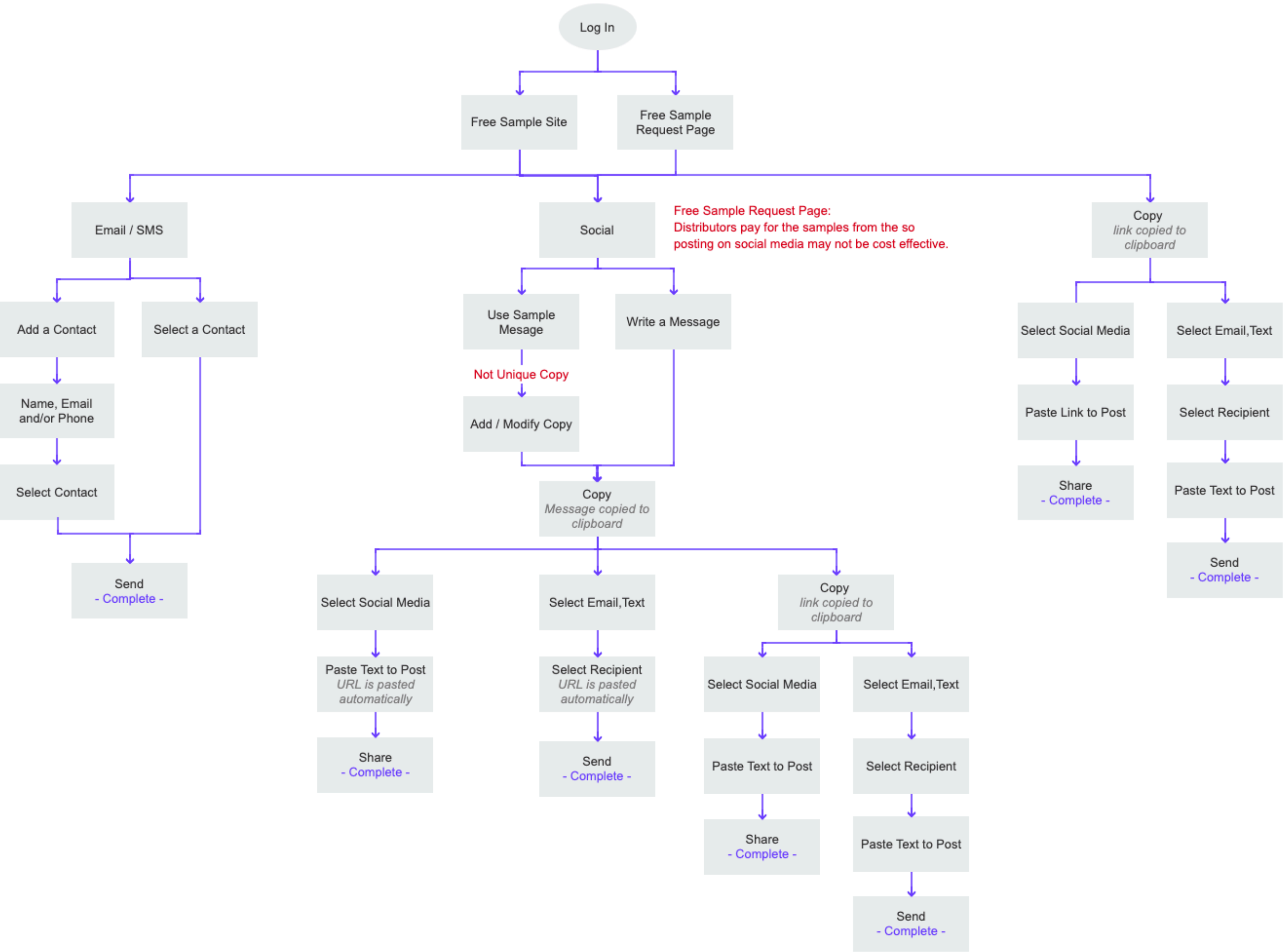
Job Story: When (situation), I want to (motivation), so I can (expected outcome).

<https://nfuszinc.atlassian.net/l/c/g1N0Xw40>

- As a distributor, I want to be onboarded the first time I send a free product from the app, so I understand the features and what information is required to send a free sample.
- As a distributor, I want to recruit new distributors, so that I can earn an additional source of income
- As a distributor, when I meet a potential prospect, I want to add a contact name and email/phone to send to a prospect, so they can fill out their shipping information and purchase a sample.
- As a distributor, when I meet a potential prospect, I want to have a QR code the prospect can use to fill out their contact and shipping information, so I can save time and avoid errors by entering the information myself.
- As a prospect, I want to receive periodic emails about my sample shipment status, so I know when I can expect delivery.

# User Flows

<https://1wrtg1.axshare.com/#id=97qq43&p=free sample site and request page workflows&g=1>





# Wireframes

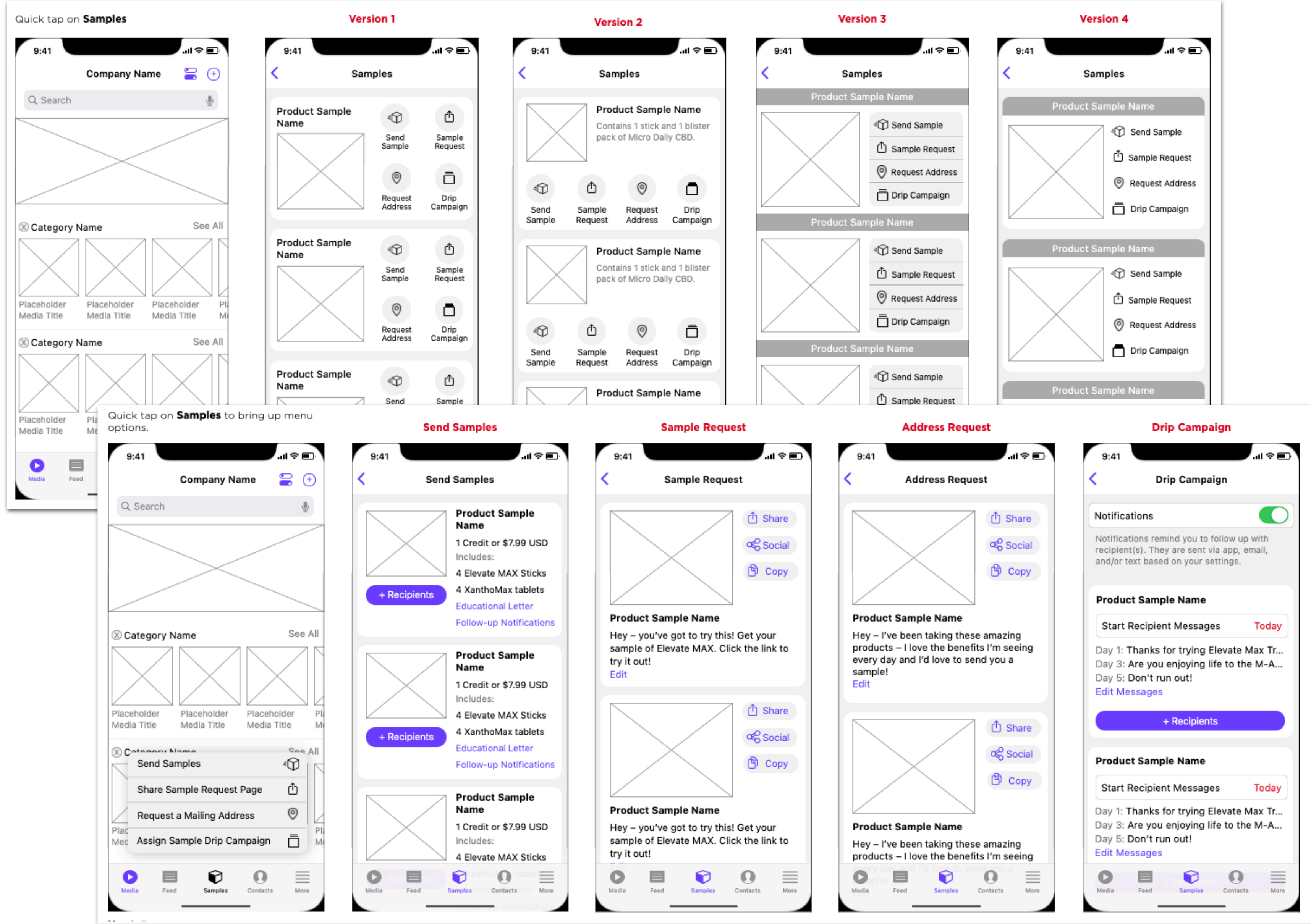
I created multiple iterations in Axure based on feedback from stakeholders, the product design team, and engineering.

<https://4mz341.axshare.com/#id=4auwsg&p=consolidate-home-page&g=1>

- How to group all samples.
- Mail samples directly to prospects.
- Share a sample website link so the prospect can order the sample.
- Request a new prospects shipping information so they can mail a sample.
- Assign follow-up emails when a product is given in person.

iOS 14 was about to be released, so I also explored the new guidelines in some of the wireframes.

<https://40pqmi.axshare.com/#id=ldyu8o&p=sampling-ios13&g=1>





# Sketch Files

<https://www.sketch.com/s/833bf629-00d3-4b25-bbc8-6a356e287228>

I created designs and prototypes in Sketch, which were used for iterative design sessions as usability testing.

Once the designs are approved, Jira issues are created with all necessary documentation, including user stories and acceptance criteria.

# Iterate

The designs are a refresh of the existing app. This enables us to continuously improve the user experience through incremental updates based on:

- Client feedback
- Customer service and technical support reports
- Surveys and polls
- Pendo analytics
- iOS updates

