



DESIGN – AUTOMATION on steroids
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Methodology

- Getting more user feedback from dashboard user testing (completed)
- Research: the best practices, ideas of competitors (completed)
- Creating a solid user flow and mockups with variations
- Involving the PM of Sales & service (Scott Sieper) and Jeremiah Weise
- Always working closely with engineers to make things possible
- Initiating conversations with AI team



Current stage of automation

- Powerful back end, platform with a lot of capabilities (NextOS)
- Implementation of an MVP version for templates selection/dashboard
- Collected feedback from user testing showcasing the need to put target selection as a very important component of the experience but also, more customization options.

Advice: using the MVP version as only a playground for more testing (no delivery to all customers until it's Connect optimized)



Discovered challenges

- More high-skilled front-end developers are needed
(the history and strength of Nextiva is mostly around backend)
- Missing dedicated PM to handle all automations projects
(automation is a giant)
- Avoiding bothering users with automation
(easy way to opt out, right now we have no methodologies)



Trend: automation is AI oriented

“Another key set of features built into ActiveCampaign is its intelligent data system, powered by the latest machine learning technology. Automatic lead qualification is enhanced by smart lead scoring that automatically updates as prospects progress along your funnel and the sales cycle.”



Benefits of automation for a business

- Save time by streamlining tasks
- Raise Lead qualification rates, Lead nurturing
- Increase sales conversations
- Improve customer satisfaction
- Drive higher retention rates to boost profits
- More relevant communications
- Improved strategy

Help to focus on the most relevant, important things



A vision: conversations + automations

- We design our services around communication tools
- Competitors mostly use communication tools as a utility
- We collect important data from conversations
- We detect sentiments (it's already an automation somewhere)
- We can help users to concentrate on the most important tasks
- We can help businesses to be more productive and efficient
- We focus on human relationships benefits instead of evil plans
- We can use artificial intelligence to deliver more value

It's a way to strongly differentiate with competitors



Main ideas of an updated version

Automations on steroids

- Bringing everything located in platform to Connect friendly UI/UX
- Creating a very friendly user experience at all levels, not intimidating
- Isolating automations in a dedicated space for user concentration
- Upgrading Call flow to a new level of UI/UX (we have a killer app)
- Adding an assistant UI/UX because beginners need it and will love it
- Adding a power mode because power users need it and will love it
- Creating a powerful navigation to make the experience efficient
- Integrating automations in conversations view (access and history)
- Adding Artificial Intelligence, innovative concepts



Why more efforts on Call Flow

- This product is liked by users
- This product is good but there is opportunity for the best UI/UX
- The access can be simplified creating a value for Connect
- The user experience can be upgraded to 2021 design trends
- We should focus on what we have as a value for users, customers
- We can get more sales related to a top-notch user experience

I was dreaming of a product like that 10 years ago 😊



Types of automation: two phases

- Voice : call flow interactive menus (upgrading for better sales)
- Sales (optimization of sale journey and results)
- Service (helpdesk tickets management)
- Surveys (measuring customer satisfaction)
- Sentiments (to manage backend detection)
- Audiences (auto populating lists of customers or users)
- Marketing (sending custom messages using email compositor)
- Reporting (receiving analytics in my inbox)
- Reminders (productivity of users)
- Bots : auto reply for SMS, email, voicemail



Resources

10 best automations / CRM tools

<https://www.ventureharbour.com/best-marketing-automation-crm/>

Best marketing automations solutions

<https://www.ventureharbour.com/best-marketing-automation-software-infusionsoft-vs-ontraport-vs-marketo/>

Best design practices, ideas

<https://www.figma.com/file/DnBh2PBQ1ecQYzW4vqEFq0/Best-practices?node-id=0%3A1>



Powering human connections