DESIGNING "PITCHY:SALES" WEB APPLICATION TO INCREASE SALES PROCESS EFFECTIVENESS BASED ON USABILITY

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Abstract

Salespeople experience trouble sharing their sales information during the sales process such as large proposal sharing and plain designed proposals. Pitchy:Sales is a tool in the form of a web application to allow salespeople from Small Medium-sized Enterprises (SME) create proposals, edit them dynamically, and share them. The goal of the project is to do research, design, prototype, and test the prototype of the web application which could help improve efficiency of the sales process. The paper described the design process of the making of Pitchy:Sales. Interview and literature research were conducted to understand the target user. Competitor analysis was performed to differentiate. Guidelines of design usability and design credibility were implemented during the designing process. Lastly, the prototype was tested to the target user to check its usability. The final prototype of Pitchy:Sales is ready to be tested further and developed as a new web application.

Keywords: user interface, usability, user interaction, web application, sales platform.

Abstrak

Title: Perancangan* interface *web aplikasi* "Pitchy:Sales" *untuk meningkatkan efektivitas dalam proses penjualan sesuai persyaratan usabilitas

Salespeople *mengalami kesulitan membagikan informasi penjualan selama proses penjualan seperti pengiriman proposal berukuran besar dan proposal yang sederhana. Pitchy:Sales adalah web aplikasi yang membantu* salespeople *dari perusahaan kecil menengah untuk membuat proposal, mengeditnya, dan membagikannya. Tujuan dari projek ini adalah melakukan riset, mendesain, membuat prototipe, dan mengetesnya untuk meningkatkan efisiensi proses penjualan. Penulisan menjelaskan proses desain dari pembuatan desain Pitchy:Sales. Interview dan penelitian literatur digunakan untuk memahami target user. Analisis kompetitor dilaksanakan untuk diferensiasi. Pedoman usabilitas desain dan kredibilitas desain diimplementasikan pada proses desain. Prototipe dites dengan target untuk mengecek usabilitasnya. Prototipe final dari Pitchy:Sales siap untuk dites dan dikembangkan sebagai web aplikasi yang baru.*

Keywords: User interface, *usabilitas*, user interaction, *web aplikasi*, sales platform.

Introduction

Pitchy, one of OWOW Agency's startups, is a tool for creating a winning pitch for companies. Pitch deck is a presentation for entrepreneurs or startups to attract investors (Cremades, 2018). This ranges from elevator pitch, investor pitch, to DemoDay pitch. The user is able to choose which kind of pitch deck they want to make from the available options, along with its duration and target audience.

With the increase of digitalization, it is now the time to expand Pitchy. So far, Pitchy only deals with the making of pitch decks. But not every company makes pitch decks on a continual basis, as it is often a one-time activity, thus the owner of Pitchy, OWOW, wants to begin a new kind of startup which targets a company's day to day needs: a sales platform.

The clients of OWOW Agency experienced some unpleasantness during the sales process, especially with the sending of large, confidential files. This cause becomes the base of the sales platform that the author is going to design. After some conversation with other business owners and clients, OWOW found a potential to help ease this problem. This is why OWOW came up with the idea of making a sales

platform which will aid the sales process. They believe that the tool could be the solution of the problem.

It was agreed to pursue the proposal making and sharing part of the sales process for the new sales platform. Proposal is a document in which a seller sells their service or product. Sales proposals generally have information about the company, knowledge of the problem, pricing and methodology (Lamachenka, 2020). This decision is chosen based on the problems found during this process.

From the talks, the main problem would be sharing the large proposals. As presentation files like powerpoint or keynote are usually one of the formats of the proposals, some of the clients have proposals which are bigger than an email's attachment limit. There are also a number of proposals that even reach 500MB. This results in changing some parts in the proposal a hassle as they need to resend the proposal later on. Minor issues like missing fonts are sometimes present. While it does not directly affect the sales process, it lacks professionality which can affect the bigger picture.

The other main problem is confidentiality. Because of the reasons above, many resort to third party sharing platforms. As the file is not public, usually companies use two methods of transferring the file. The first would be using an online cloud storage service, in which they have to give permission to every viewing request form their clients. The other would be sharing it through big file online transfer service. While it is more convenient, they have no way to control who received the file once it is being sent out.

The sales platform that will be designed is named Pitchy:Sales. It is a tool for companies to make an online proposal and share it to their client during the sales process. The author concluded that making the proposals online would be the right approach as it will be more easily accessible and can be accessed on the go. Moreover, the proposal that is generated will be designed and white-labeled with the company's brand which will boost its credibility.

Main Question

How to make interactive design for a web-based "Pitchy:Sales" platform that can help SMEs share their sales information to improve efficiency during the sales process?

Scope and Limitation
The project would mainly be focused on the visual design part, which means that development is out of scope. But some knowledge of development is necessary to make sure that the design would be easy to understand by the developers and doable within the time constraint and budget.

Method

Design thinking method was used during the process of creating the web application. Design thinking is a design methodology oftenly used for creative problem solving. The Hasso Plattner Institute of Design at Stanford University describes it as 5 main stages which are (1) emphatize, (2) define, (3) ideate, (4) prototype, (5) test. The project starts with emphatize which is to research what the user's needs. After the data is collected, the next step would be to define what the users' needs and problems are. The designer is ready to generate ideas on the third step, ideate. In here, the designer should provide alternatives to test as well. The fourth step is prototype, in which the designer can design a scaled-down 'prototype' in order to be tested on the users. The designer can go back to the previous steps in order to fix or perfect the product.

Literature Research
Literature research was done by reading journals and books about sales process to understand how salespeople think.

Interview
Interview was conducted to the target audience in order to understand them better. Furthermore, the problems were validated and the user needs are discovered.

Competitor Analysis
Competitor analysis was practiced as a part of the desk research to learn about the features, strengths and weaknesses of the published similar tools. Eight web applications were analyzed, with the emphasize on the UI and UX of the top three: PandaDoc, Proposify, and Qwilr which are assumed to have the best user experience compared to the others.

User Testing
User testing or usability testing is one of the methods to check the usability of a website, web application, or mobile application. Generally, the facilitator will ask the participant to perform prompts and observe the behavior of the tester while doing the tasks (Moran, 2019).

Discussion

Target Audience

Small and Medium Sized Enterprises (SMEs)
SME is the term for Small and medium-sized enterprises (SMEs). According to the European Union

(2017), an SME is a business that has a staff number less than 250 people, with turnover less than € 50 m or balance sheet total less than € 43 m. As defined in document "EU recommendation 2003/361", SME is divided into three company categories:
A medium-sized company has less than 250 staff, with either less than € 50 m turnover or less than € 43 m total balance sheet
A small-sized company has less than 50 staff, with either less than € 10 m turnover or less than € 10 m total balance sheet
A micro-sized company has less than 10 staff, with either less than € 2m turnover or less than € 2 m total balance sheet.

In the Netherlands, SMEs are called MKB or Midden- en Kleinbedrijf. Although the Netherlands follows the EU criteria for determining SME grant or subsidy scheme, the Netherlands Chamber of Commerce uses different criteria in how much detail a company has to deposit their annual financial statements. (Netherlands Chamber of Commerce & KVK, 2020).

The number of small and medium-sized enterprises has risen over the last years. There were over 443,842 SMEs in the Netherlands in April 2020, with 4,475 increase from 2016. The information and communication sector increased by 67% throughout the decade. The other industries include web stores, IT providers, transport related services, and food and beverage industries (Pieters, 2020). This makes SMEs one of the potential target markets of Pitchy:Sales.

The main industry that OWOW would target would be financial technology, as it is who OWOW Agency has many connections with. However, it does not close the possibility of marketing the tool for other industries.

Modern Selling
Selling, as its name suggests, is to make a sale. In most companies, they spend a lot of money training their salesperson in the art of selling, because they are the forefront of single important interaction with the customer. (Jobber & Lancaster, 2015, p.4). There was a shift of media used for the sales process throughout the years. Before the internet, every sales information was done traditionally i.e. by call, fax, or mail. Nowadays, businesses have integrated the Internet and electronic commerce into their corporate strategies. (Hutt & Speh, 2009, p.304).

Traditionally, the regular selling process consists of: prospecting, pre-approach, approach, presentation, overcoming objections, closing and follow-up activities (Dubinsky, 1980/1981). However, the environment has changed and selling is more than what it used to be. Technology is heavily dependent upon and customer-client relationships have become as important as the selling itself. (Hutt & Speh, 2009).

According to Jobber and Lancaster (2015, pp.5-7), there are 6 characteristics of modern selling: (1) Customer retention and deletion, (2) Database and knowledge management, (3) Customer relationship management, (4) Marketing the product, (5) Problem solving and system selling, (6) Satisfying needs and adding value. They emphasized the importance of technology and information especially the use of digital platforms on the second and fourth point. There is also flexibility that comes with electronically stored information which will greatly influence speed and accuracy.

Interview
Discussion and interview was conducted to the two key holders relating to the user. The discussion was done to the author's supervisor to gather the data that shaped the initial persona of the user. The interview to the targeted user was done to validate the data from the previous interview. There were also follow up questions that were asked during the user testing.

From the discussion, it was concluded that the companies that OWOW came into contact with had almost a fixed kind of proposal that they tailored for each of their new potential customers. However, sometimes, the files become large as some of them are in the form of presentation files, thus they could not send it freely using email. This resulted in them using unsafe online sharing platforms that are untraceable.

The interview gave insight about the sales process for another company, and also to understand what parts are important for a proposal. The interview was also used to validate the value of the designed portfolio. The interviewee admitted that a well-designed proposal would make the company look more professional and credible.

Based on the data by the interview with OWOW, the possible user, and the description by the author's supervisor, two personas were made to fit with the targeted users of Pitchy:Sales.

Persona
Based on the information gathered, two personas were made. They are believed to be the main user target that would be using the Pitchy:Sales.

Yvon Giesberts is a sales manager in her 40s. She is careful, attentive, and takes her work seriously. She wants to make proposals that are quick and efficient, and has a neutral view of designed proposals. The other persona is Jans Kuijs, a young man junior sales staff in his 20s. He is driven and wants recognition, but likes good designed proposals.

Deciding the Features of Pitchy:Sales

Initial Ideation
A brainstorm session was conducted to materialize the idea behind the making of Pitchy:Sales. This is done to clarify the idea and elaborate more of the websites, and to affirm which pages are to be designed. The result was the user flow and the list of pages that are going to be designed. OWOW and the author agreed that Pitchy:Sales would be divided into two main parts.

The first one would be "the web application" part where the *admin* (client of OWOW) can generate and share proposals for their *client* (client of OWOW's client). This includes the ability to login, create new proposals, edit existing proposals, share the links of the proposal to the admin's clients, see the tracking of the proposals, settings of the proposals, add and edit new templates for the proposal.

The second part would be "the output" of the admin in the form of *white-labeled web proposal* which will be seen by the *client*. By white-labeled, it means that the web proposal would be using the branding of the client of OWOW. In here, the client is able to see the details of the proposed proposal.

White Labeling
White label or private label, according to Oxford dictionary, is "a product that is made by one company but sold by another company using their own name" ("White label", n.d.). In Pitchy:Sales case, the web proposal that the client sees would be a web proposal using the branding of OWOW's client.

According to the journal of Umathay and Sinha (2016), white label UX parameters include: (1) Overall product redesign, (2) Color and Brand theme (Brand guidelines), (3) Content change – tone, style, locale, cultural adaptation, and content style guide, (4) Typography & font specification, (5) Page layout, navigation, and UX elements, (6) Form elements, (7) Button styling, (8) Top header, (9) Messaging strategy (connecting with user), (10) Menu theme and tab styling, (11) Iconography, (12) Graphic adaptation, (13) Client design principles and adherence, (14) UI guidelines, and (15) Measuring success.
The final output of Pitchy:Sales, which is a proposal, would be implementing most of the points above that are relating to the visual aspects such as the color, typography, and page layout, depends on the companies that would use the web application.

Competitor Analysis
This step was done in order to analyze what is already on the market, what is lacking from them, and what Pitchy:Sales can do to differentiate. This was done by comparing the top proposal-making sites based on G2 and Capterra review sites, to eight possible competitors that have been established for years and have gone through some development and improvements.

PandaDoc
PandaDoc is an all-in-one document automation solution. They have advanced capabilities, but claim that they have simple and easy to use tools for teams of all sizes. The biggest in the industry, it focuses on simplifying the workflow of process for all business types. There are many options of documents that the user can make, ranging from contracts, proposals, invoices, to pitch presentation files. Their advantage is the customizable and interactive documents with 450+ templates for many fields of work. It also has multiple commonly used integration applications that are widely used by companies.

From the Template page, the user can hover on the template and click on the "Create document" for that specific template immediately. This part of the interaction is implemented into Pitchy:Sales. From the Template pages, the user will be able to directly make a new proposal.

The overall interface of PandaDoc is clear, although the capability is too overwhelming and too complete. The author aimed to make the interface as user friendly as PandaDoc even though with limited capabilities.

Proposify
Proposify is an online software that is used to create, send, track and e-sign proposals, contracts, and agreements. Unlike PandaDoc which embraces almost every kind of document, Proposify focuses more on the deal closing. Its capabilities are almost the same with PandaDoc, although it is losing in the design look of the editor and number of templates.

Upon signing in, the user can directly look at the list of proposals with the pipeline and it is grouped by their status. Unfortunately, there is not any option to filter the status. So, if the user has a lot of files, they either have to group it manually using the categorisation called "Stream", or keep a number of proposals on the "Proposal" category tab.

The editor feels less overwhelming compared to PandaDoc because they are based on the click and edit process. It is prone to misclicking because the options on the right (text, picture, video, shape, line, table, and sign blocks) are directly connected to the editor area. The "Sections" on the left part of the editor gives a nice overview of the whole document, and it can also help with the navigation on the file. The user can also drag and drop the sorting of the sections. This part is implemented in Pitchy:Sales. The user will be able to drag and drop the topics if they decide to change the order of the topics.

Qwilr
Qwilr is a web application tool intended to make design-perfect proposals, quotes, and client updates with speed. The design is modern, clear, and neat. The author believes that Qwilr is the best competitor that Pitchy:Sales has. Unlike the first two, Qwilr is web-based, meaning that the proposals being sent out are on the form of a website with either custom subdomain (yourbusiness.qwilr.com) or custom domain (documents.yourbusiness.com). The web document is also mobile friendly. The overall interface design is clean and straightforward, which eliminates the feeling of being overwhelmed.

Unlike the first two competitors in the example, the text editor option of Qwilr is located close to the highlighted text. This makes it easier to spot, without needing to move the user's mouse pointer to other places. The editor type is implemented on Pitchy:Sales as the editor options will be located near the highlighted text.

Features of Pitchy:Sales

Making a Proposal
In this part, first, Pitchy:Sales will show the template choice to the user. These templates are what the user has made beforehand. They also have the option to use a blank proposal in which they can fill in. After picking the template and writing in the information such as title, description, and due date, the user will be directed to the proposal editor.

Editor
In either the filled template or the blank template, the user could make or write a new proposal from here, or edit some parts from the template. By edit, they will have the ability to change the text, the pictures, upload a new file, and change the choice of device for the mockup part.

Template
The user is able to make templates depending on the company's needs with different contents here. They can create new templates, edit the templates, duplicate the templates, and delete the templates.

Tracking
There are two kinds of tracking. One is the global tracking in which the user can see the whole analytics of the sent proposals. The analytics available are duration, views by number, views by country, clicks and downloads. While the second one is individual tracking per proposal, with the same kinds of tracking. In addition, the user can also track the activity that happens in the specific proposal.

Designing Pitchy:Sales

Design and Usability

Usability is one of the quality attributes used to assess how easy user interfaces are to use (Nielsen, 2012). It is closely related to human centered design, as the main focus of this subject is how people will behave if they are faced with the technology or the interface. Donald Norman in his book "The Design of Everyday Things" (2013) explained that usability design is "an approach that puts human needs, capabilities, and behavior first, then designs to accommodate those needs, capabilities, and ways of behaving."

In general, according to Nielsen (2012), usability design is defined by 5 components:
(1) learnability which is how easy for user to accomplish the main task,
(2) efficiency which tells how fast the user perform task once they are used to the interface,
(3) memorability which relates to how good they will perform after not using the interface after a long time,
(4) errors, as the name suggests, translates to how may, how severe the errors are and how fast they can tackle it, and lastly,
(5) satisfaction which express how pleasant it is to use.

Jakob Nielsen (1994) in his paper "10 Usability Heuristics for User Interface Design" supports the points mentioned by Norman (2013) in the aforementioned book, with his statement of the importance of feedback, with other addition including user's freedom of choice and way to go back if they make any error, consistency and minimalism of the design, and making the user recognize rather than recalling.
1. System status has to be visible. This means that the user has to have any kind of feedback within a reasonable time during the interaction with the interface.
2. The language used should be the same as the "user's language".
3. Users should have control and freedom of their choice, and we should provide a way for them to get back if they make a mistake.
4. Consistency and standards should be the same throughout the whole experience.
5. Minimize error by designing it in a way to prevent a problem or giving them confirmation before committing to a certain action.
6. Reduce the user's memory load by making them recognize, rather than recalling.
7. Facilitate user's speed up when doing repeated interaction.
8. Aesthetic and minimalist design, where all unimportant, cluttered elements or dialogues are removed
9. Give users a way to recover from error by giving them clear, precise hints and suggest a solution.
10. Lastly, documentation or tutorial is important to provide help. This will include the overall function of the user interface.

Design with usability in mind is essential in improving the user interaction of the web application. The points by Nielsen and Norman are useful starting points to be implemented in order to achieve a user friendly web application. During user testing, Nielsen's usability design components will be used: learnability, efficiency, errors and satisfaction. Memorability will be excluded as the web application is not available long enough.

Design and Credibility

As B2B sales depend on many parties, it is important to maximize the possibility of a proposal getting through. One of them is to make the proposal, which is in the form of a website, more credible. According to the Oxford dictionary, credible means "that can be believed or trusted" and "that can be accepted, because it seems possible that it could be successful" ("Credible," n.d.).

On a study by Fogg in 2002, he conducted a research for three years with over 4,500 people and concluded that there are 10 guidelines to make a website credible:

1. Make it easy to verify the accuracy of the information on the site
2. Show that there is a real organization behind the site
3. Highlight the expertise in the organization and in the content and services provided
4. Show that honest and trustworthy people stand behind the site
5. Make it easy to contact the person in charge
6. Design the site to make it look professional or appropriate for the purpose
7. Make the site easy to use and useful
8. Update the site's content oftenly
9. Use restraint with any promotional content
10. Avoid errors of all types

There is another study by Fogg et al of Standford's Persuasive Technology Lab in 2002 with 2,684 people about web credibility of 100 different websites. After analyzing people's comments and opinions, they categorized the topics. 46.1% of people consider design look to be the most important part of website credibility. It is followed by information design / structure with 28.5% and information focus with 25.1%. Company motive and information usefulness were only 15.5% and 14.8% respectively. As for design look, it has the most impact in "Finance" sites by 54.6% (Fogg et al., 2002, p. 23), which is also one of the main possible clients for OWOW to use Pitchy:Sales.

Similarly, Jakob Nielsen of Nielsen Norman Group also had the same opinion in his paper in 1999. He listed 4 ways of design that can communicate trustworthiness which are delved into detail in a study 17 years later by the same group, Nielsen Norman Group, in a paper written by Harley in 2016. Interestingly, despite the different time frame and design trend change, what influence user's quality perception still the same:

a. Design quality

It is important to make the site appear legitimate and professional. For example, the site should use an appropriate color scheme and imagery. Visual design is closely related to the target audience, thus creating a design relating to the subject is necessary. Mistakes are not tolerable, and this includes typos and broken links, as it communicates an overall lack of attention to detail and gives a negative first impression.

b. Up-front disclosure

People appreciate if the company is open about all information that relates to the customer experience, i.e. contact information and pricing. Feeling of transparency might be different for each type of industry, though. Designers should proceed with login walls carefully. Users need to be given something before the company asks anything from them, just like reciprocity theory in psychology. The case would be different if the user benefits significantly from these walls, i.e. for sensitive and personal information. (Budiu, 2014)

c. Comprehensive, correct, and current

Based on Nielsen Norman Group's study, users appreciated sites that have a large amount of related and relevant content which mirrors the organization's values. They also appreciate images of processes, as those help them understand the organization better. Surprisingly, generic photos are often considered filler or decorative images rather than useful information (Nielsen, 2010).

d. Connected to the rest of the web

Businesses need to be connected through external, unbiased sources like review sites or various social media as they contribute to openness of the company. "People have learned to trust these external sources more than company-sponsored content". Most people would also read reviews before deciding which company to buy from or hire.

Later, the end result of the web application would be in the form of an online proposal, similar to a small site. Great care is needed to make the proposal look credible. Even though the proposal is not a website, study by Fogg and Nielsen gives the insight of the qualities needed. While not every points in the guideline by Fogg is applicable in Pitchy:Sales as the output of it will not be in the form of a full website, some points are still applicable, for example, the importance of the overall design look and make it easy to contact the person in charge. They are implemented during the designing of the web application.

Wireframe and Design of the Clickable Prototype

After the list of features and pages were finalized, the author proceeded with the making of the basic wireframe of the web application. The first sketches were done on paper, which translated into a digital wireframe. There were two versions of the digital wireframes. The very first version of the wireframe was too complex for the minimum viable product (MVP) as it had different pages on the final outcome. Thus adjustments were made based on the feedback and the process was simplified. The flow of the second wireframe was accepted which would be translated to the final design.

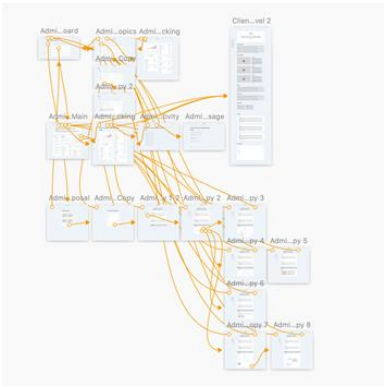


Figure 1. Digital wireframe of Pitchy:Sales

The designing of Pitchy:Sales was done with the approved wireframe. The design style used was the design of Pitchy:Sales parent web application, Pitchy. This was chosen in consideration of reducing the development time, as many of the original Pitchy design and structure can be implemented in Pitchy:Sales. While designing, the points of usability heuristics as described by Nielsen in 1994 were implemented and checked. Some of the examples are: feedbacks of the interactions were made sure to be addressed, undo and redo on the proposal editor were presented to avoid irreversible error, and the design was minimal and consistent with fixed measurements. While making the example of the finished designed proposal, the points about credibility were kept in mind.

Figure 2. Example of point 1 of usability heuristics implementation

The border of the clickable ‘section’ changes to a stronger blue once they are active, and the editable part becomes blue once it is hovered.

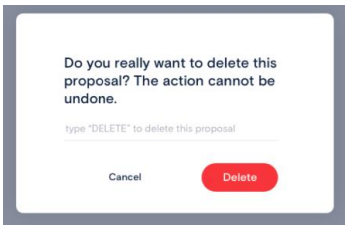


Figure 3. Example of point 5 of usability heuristics implementation

Providing confirmation before the user deletes the proposal.

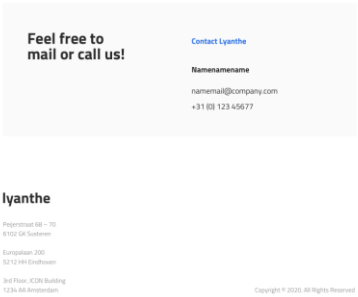
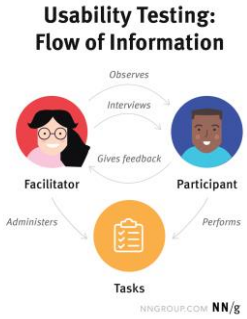


Figure 4. Example of point 5 of credible website by Fogg

Make a way for the client’s client to directly have a contact with the proposal maker.

Measuring Usability

Usability is possible to measure. Although it is easy to specify, it is hard to collect them. Usually, the basic measurements are: success rate (learnability), the time a task requires (efficiency), the error rate (errors), and users' subjective satisfaction (satisfaction) (Nielsen, 2001). The data can be collected from novice and experienced users although novice users are preferable because new websites do not have experts or loyal users (Nielsen, 2012). Novice users are testers who do not have experience with the interface, while experienced users are those who have been using the interface for a longer time.



Source: NNG Group
Figure 5. Flow of information during user testing

A way to test usability is by doing usability testing or user testing. In the session, usually the facilitator or moderator gives tasks to the participants by using one or more user interfaces. The facilitator observes the participant's behavior and listens to any feedback during the process. It is a way to identify problems in the design, uncover ways to improve, and learn about the user's behavior and preferences when faced with the interface. (Moran, 2019).

Usability Testing Session
In total, the author did two sessions of testing, with small internal checks in between. The author acted as the facilitator which gave the tester instruction of tasks to perform. The two sessions of the testing were based on the versions of the design.

First Testing
The first part of the testing was using the fixed and approved layout by the author's supervisor. The test was done to more staff of OWOW internally and one fresh tester who had never seen the product. The main part that was being tested was the flow and the editor components. The problems were addressed and the prototype was ready for final testing.

Goal:
1. To check the overall flow of the platform
2. Testing the editor and the mockup part

Participants:
Two internal (staff of OWOW) and one external novice user

Tasks they need to do and discussions:
1. Create a new, blank proposal
2. Try to change the image to the one from the tester's computer file
3. Change the mockup from phone to laptop, and then change the image in it
4. The eye icon at the top right part of the screen

Data collected:
1. What the users were struggling with (especially the mockup chooser).
2. The overall impression of the web application is clear and nice.

Second Testing
The final and the last part of the testing was done using the final version of the design, after the iteration from the previous testing round. Testers were given the link of the clickable prototype and the test was conducted online via video conference and screen sharing. The focus of the test was to check the editor components and flows, and in the end, the testers are free to explore the clickable prototype and voice their opinion about the prototype. The participants were internal (staff of OWOW) and three novice users that had never seen the web application before.

Goal:
1. To check the overall flow of the platform after the fixes
2. Re-testing the editor and the mockup part after the fixes
3. The overall impression

Participants:
Three external novice users

Tasks they need to do and discussions:
1. Create a new, blank proposal
2. Try to change the image to the one from the tester's computer file
3. Change the mockup from phone to laptop, and then change the image in it
4. Their impressions

Data collected:
1. The perfecting of the mockup chooser.
2. Fixes on visuals that are not too user friendly.

Testing Result and Changes to the Design

There were a lot of changes based on the user testing result, and here below were some major changes that facilitates a better user experience.

Figure 6. Changes on table of the dashboard
The table on the dashboard used to have the title, button of editor, button of tracking, status, and last updated date. After the update, the clutter was removed. The "edit" word was gone, but the user can still directly edit the proposal by clicking on the title of the proposal.

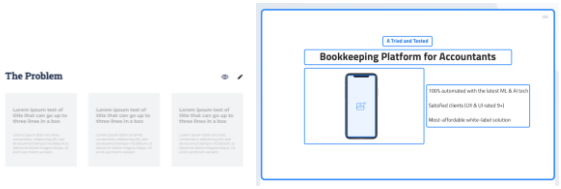


Figure 7. Changes on the eye icon on the editor

The eye icon is now removed and the edit icon is changed to the three dots. The reason this change was done was because the eye and the edit icon were confusing; The function itself was not too important, thus it was put behind the three dots, which is a more common option for “more”.

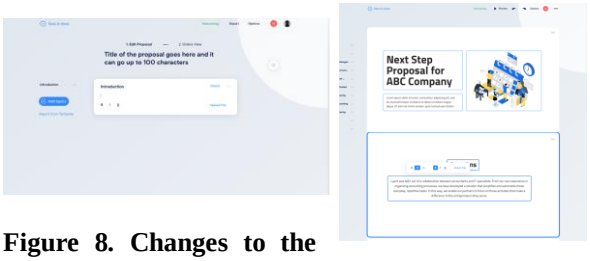


Figure 8. Changes to the editor of the proposal making

This part has seen the most change throughout the project. At first the editor was similar to the original Pitchy, with a tight, plain editor. But now it has transformed to a more dynamic setting which emphasizes on the user interaction with the design version that looks like the final product. The change was done so that the user could edit the proposal with the closest visual interpretation.

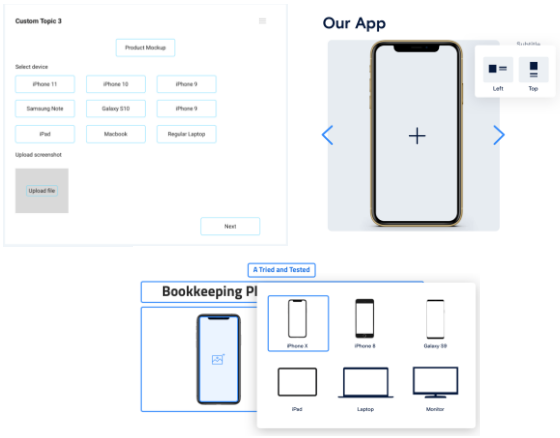


Figure 9. Changes to the mockup part

The mockup is also one of the parts that has undergone many transformations. From the wireframe which is in the form of a chooser, it changed to the arrow type. However, the arrow type confused the user because they had the thinking that it would also act the same on the final product. Thus, the pop up modal was chosen as the ideal way to show this part.

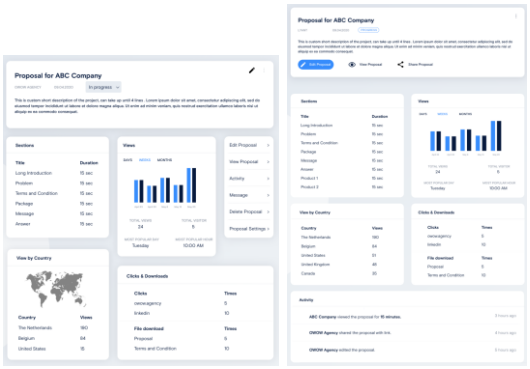


Figure 10. Changes to the tracking of individual proposal

In the previous version, the tracking was not neat and the action button was located on the right side. When the user was asked to “view the proposal”, it took them quite some time to find the button. The new change was made in order to address this problem. Now, the most frequent action button is located clearly on the top part of the proposal, and it has made the reaction time significantly faster.

The above mentioned changes were the most significant one. There were also small changes to perfect the small interactions for the user friendliness.

Overview of the Main Screens

Dashboard

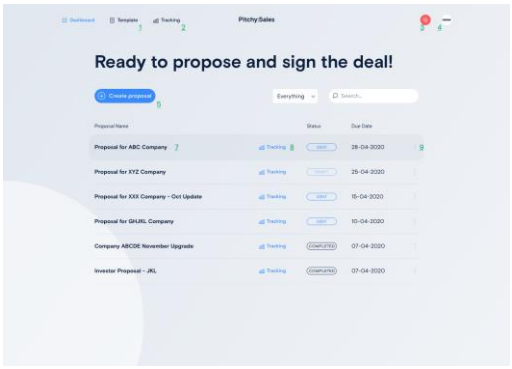


Figure 11. The dashboard of Pitchy:Sales

1 - The user can go to the Template list and create or see the templates they will make. This will help the user speed up through the repeated process.
2 - The user can understand how well their proposal goes by observing the analytics.
3 & 4 - The user can view notifications and the profile setting, respectively.
5 - Create a new proposal - The user can create a new proposal by clicking on this button. The button was

bigger than the rest, therefore, it would be easier for them to recognize.
6 - The user can filter the proposal based on the status (everything, draft, sent, completed).
7 - When clicked, the user can directly go to the proposal editor.
8 - The user can see the individual analytics report per proposal.
9 - There are additional options here such as share, preview, duplicate, and delete proposal.

Editor

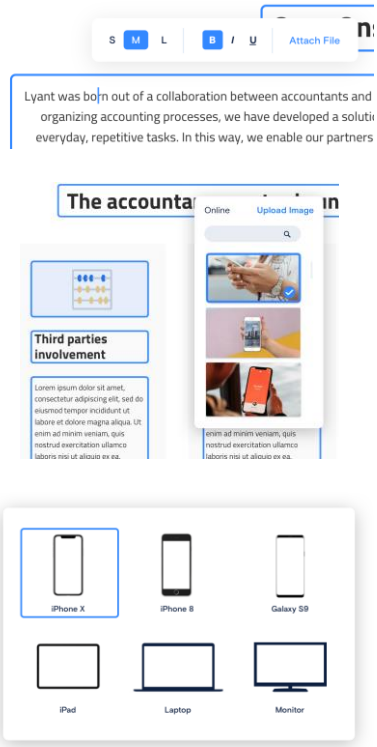


Figure 12. The editor of Pitchy:Sales

The main editor revolves around text editor, image changer, and mockup making. The user receives feedback after clicking on the parts that they want to edit.

Tracking

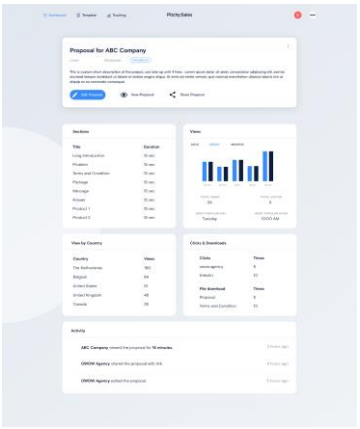


Figure 13. The tracking page of the individual proposal after being sent out

From this screen, the user is able to directly edit the proposal, view the proposal, and share the proposal. They can also change the setting of the proposal, or delete the proposal from the three dots on the top right corner. The most important part of this screen is the ability to see the tracking of the proposal such as the duration, time, location, the clicks, and the activity.

Conclusion

This research paper was written with the aim of making an interactive design for a web-based Pitchy:Sales platform to assist SMEs share their sales information during the sales process. With this platform, OWOW Agency also wishes to build more startups and become acquainted with more clients, which is in line with OWOW's long term goal.

At the start of the project, the main question "How to make interactive design for a web-based "Pitchy:Sales" platform that can help SMEs share their sales information to improve efficiency during the sales process?" was asked. The target audience was salespeople in Small Medium Enterprises (SMEs) with the range from 25 until late 40s which was validated by interviews. Literature and desk research were done to understand how the salespeople think, and also to find out what Pitchy:Sales can differentiate comparing to the competitors. User testing was conducted to test the usability of the clickable designed prototype by asking the testers to perform several tasks. The result of the test were implemented to further increase the usability and effectiveness of the web application.

After answering the sub questions above, the main question "How to make interactive design for a web-based "Pitchy:Sales" platform that can help SMEs share their sales information to improve efficiency during the sales process?" was answered with the clickable final version of the prototype. The project

has reached its goal and the author has delivered the prototype to OWOW Agency for development.

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