Cost Management Cloud Solutions

Design Strategy For A Leading Enterprise
Imaging Solutions Provider

PRIMAL LOOP was commissioned to develop a unique interactive tool for a leading enterprise solutions provider. The client is a Global 500 corporation specializing in imaging technologies that address the financial, operational, and environmental goals of a range of clients. The deliverable would ultimately be a dashboard interface that helped organizations reduce their carbon footprint and optimize office supply spend through the efficient use of leased devices.

From Concept to Execution

An intensive client workshop allowed Primal Loop to discover the project's various challenges. This multi-phase workshop consisted of a discovery session; a review of the client's pitch deck presentation; a phase focused on ordering priorities; and, finally, a focus group concentrating on the different proto-personas identified as key user groups. Primal Loop then implemented a dashboard that fully accounted for the user groups defined through the workshop. Ultimately, this deliverable required a multitiered suit of products that targeted to the needs of each major user group, while remaining flexible enough to adapt laterally to user needs within each group. This case study concludes with an overview of this final product that resulted from the client's close collaboration with Primal Loop.

The Challenges

It all began with what, at first, sounded like a simple call. According to the client, they were ready to move forward with the dashboard design. We would eventually learn that the client required a multilayered interface that addressed the various needs of different user profiles. Such a cross-functional interface design would mean simultaneously meeting the needs of C-suite users, department directors, and power users, while also laterally adapted to these user types. At the beginning of our engagement, though, we were

far from a realization of this clear set of requirements. Indeed, upon consulting further with the client it became clear that a more thorough discovery phase would be necessary. The first step though was the project kickoff, in which Primal Loop met with the client's internal stakeholders in order to understand their goals and objectives for the project. The primary objective here was to listen in order to obtain a clear vision of the product overall.

The Workshop

Following the kickoff meeting, both parties engaged in the first phase of an extensive, three-part workshop. As noted, the first phase focused on planning and discovery. The nature of this part was more open-ended than the rest, emphasizing inclusiveness and participation over hierarchy and goal-directedness. Another principle was to de-emphasize design aesthetics and to focus on problem solving rather than appearance. We describe this as "low fidelity."

The next part of the workshop, which we referred to as "Evolutions," consisted of responses to six individual questions:

- Who is using your product?

- What are their goals and needs?

- Why are they using our product?

- Where are they using your product?

- When are they using your product?

- How are you helping them?

Primal Loop began working through each of these questions as the client reviewed their sales deck. This allowed both parties to hone in on some of the subtle interrelations between users, product features, and user cases. At this point, there was still a need to solidify the specific priorities of the product deliverable.

The discussion of feature priorities was one of the most animated moments of the workshop. Primal Loop collected input from sales, IT, data managers, and executives to determine which features would be at the top of the list and receive the most resources and attention. Following this collective decision-making, Primal Loop led the various client teams on an exercise for determining specific user case scenarios for a set of "proto-personas." As one of us characterized it, "While personas are traditionally based on user-research, proto-personas are typically based on the insights and understanding of subject matter experts in the context of who they think their user is." With such a diverse array of departments present, the group had a variety of specific perspectives on who the product user is at any given time.

Initial Proto-Personas

**Vice-President
of Finance**

Needs insights into cost
and operations in order to
manage the budget

**Department
Director**

Needs to balance
department costs against
the department's budget

**Operation's
Manager**

Needs to manage
equipment, inventory and
operation resources

Proto-Persona and Department Interactions

Director of
Technology

Vice-President
of Finance

Director of
Finance

Department
Associate

Department
Director
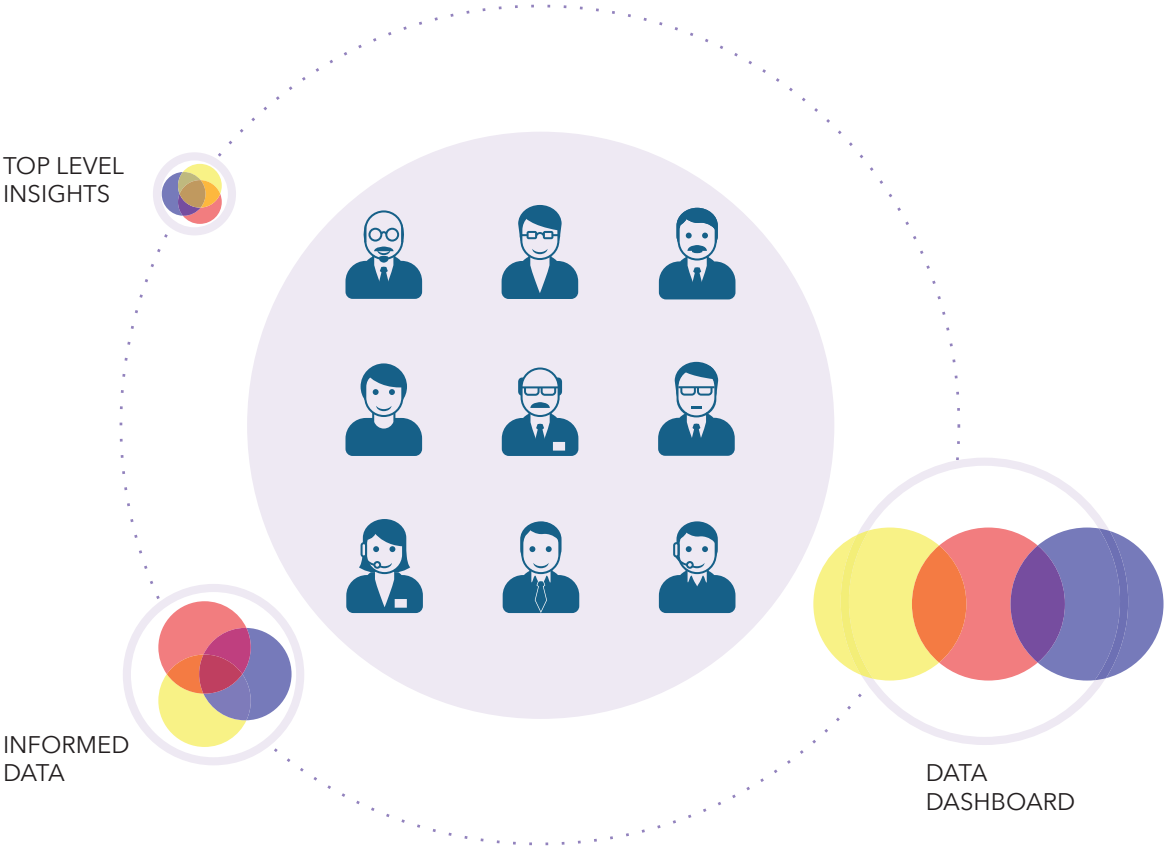
Department
Manager

Tech Support

Operation's
Manager

Data Analyst

The Learnings

As a way to complement the workshop and lead directly into product implementation, Primal Loop also conducted a series of focus group interviews. Here the group setting was imperative. As one of our team members noted, "The benefit of a group setting is the opportunity to hear about the group's desires, needs and reactions to a specific prompt across multiple departments in the same session." By applying a human-centered and collaborative approach, we were able to understand the most complex dashboard desires of the power user and assess the magnitude of the product-market delta between user expectations and business objectives. This led Primal Loop to its unique multi-tiered proposal through mapped out workflows, thresholds, and alerts set "at every milestone of the process." The suggested product roadmap featured a multitiered suit of products targeted to the needs of each major user group, but flexible enough to adapt laterally to user needs within that group.
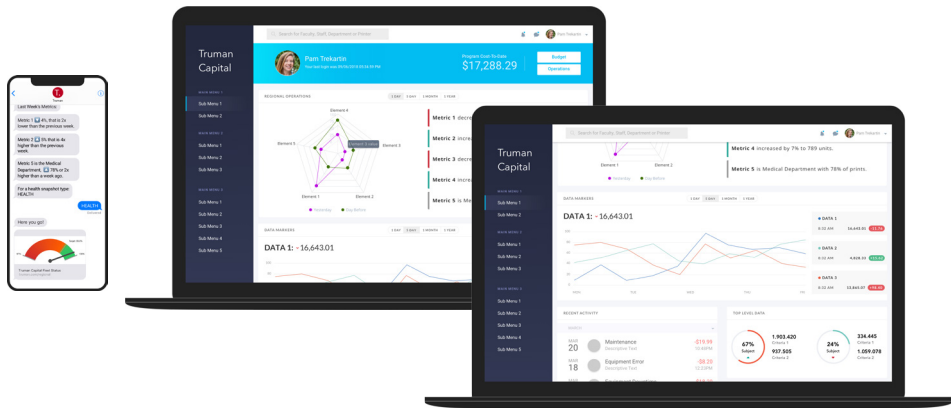
People-Centered Tools For Decision Making

TOP LEVEL
INSIGHTS

INFORMED
DATA

DATA
DASHBOARD

People were not asking for a dashboard, as much as they were asking for decision making tools tailored to their specific roles and need.
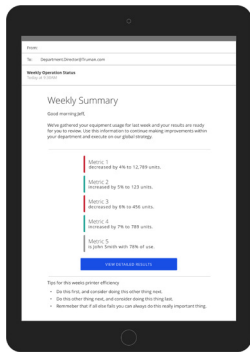
Vice-President of Finance

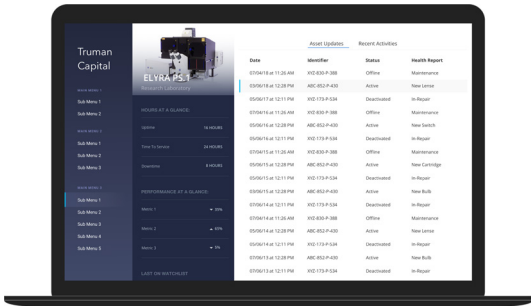Mobile updates available via SMS and in-depth analytics terminal.

Department Director

Top level metrics email with actionable items to bring metrics back in line.

Operation's Manager

In-depth access to maintenance calls, errors, performance and machine history

The Outcome

In the end, this multifunctional approach resulted in different use cases. For C-suite users, they were less interested in large amounts of data and more focused on the status and the health of the product overall. Borrowing from Seamless, Amazon, and Delta Airlines Flight Notifications, Primal Loop proposed a mobile solution that delivered synthesized insights via mobile push notifications. For department directors, they prefered more of a digest-style missive that was delivered directly their inbox. Finally, the power user had the most granular level of data access, including on-demand status updates, push alerts, maintenance schedules, and status notifications.

In conclusion, the client was thrilled with the implementation and how it satisfied the three use cases. Only through such an open and thorough process of research and collaboration was Primal Loop able to identify solutions that fit the patterns and behavior of each user. And although Primal Loop offered three base solutions, adaptation and flexibility—for instance, added features for roles and user permissions—were also key.