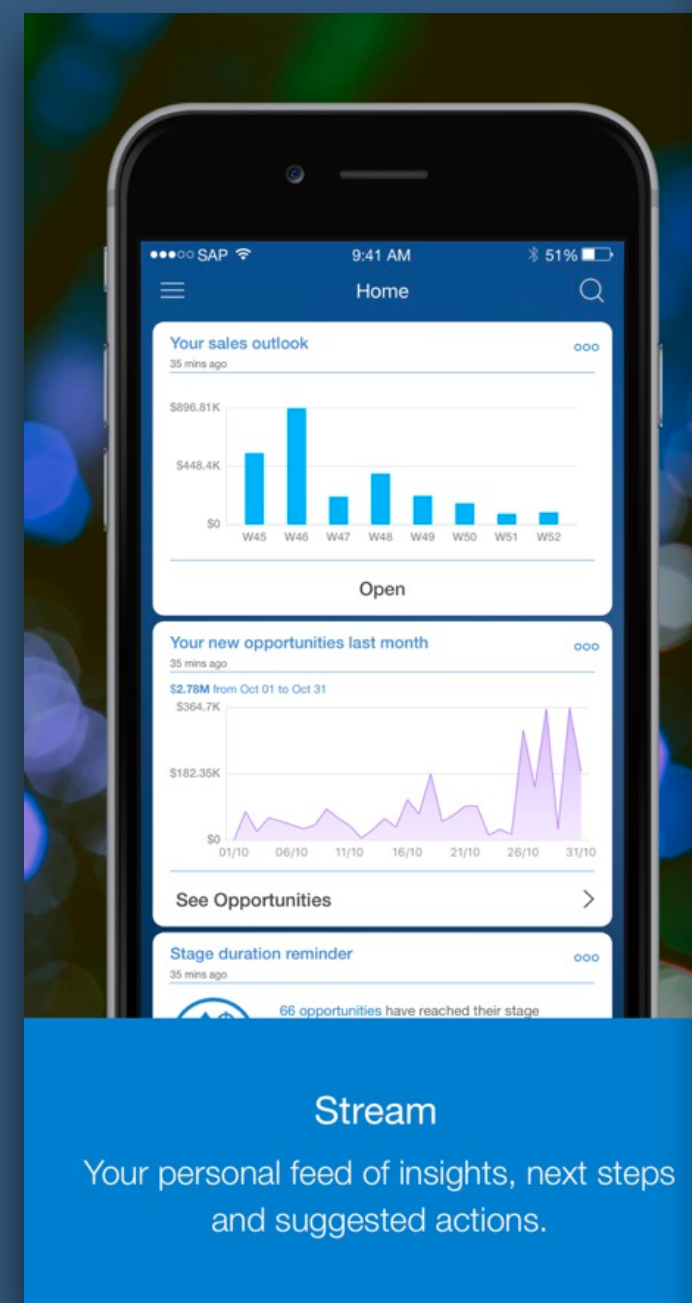
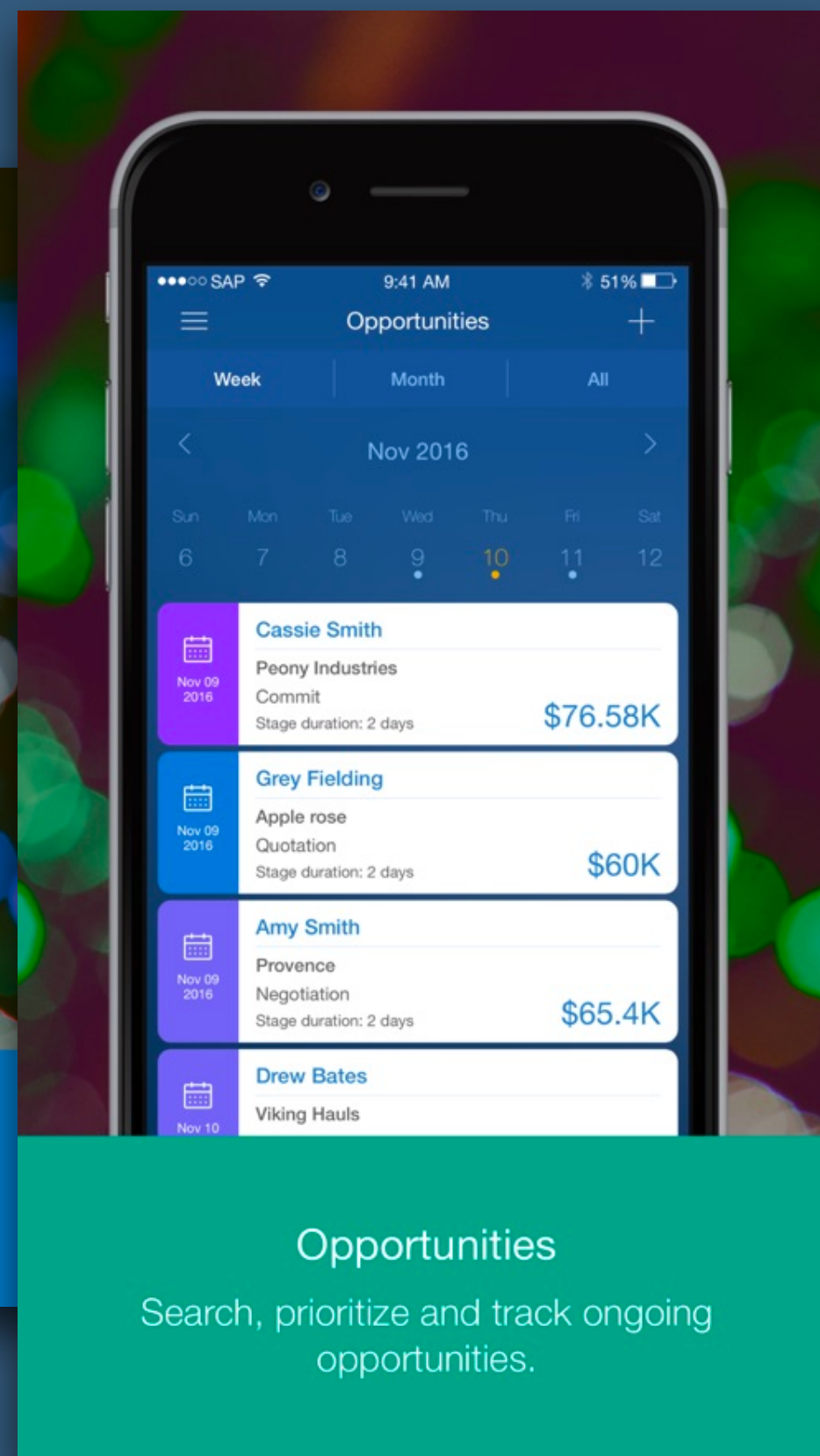




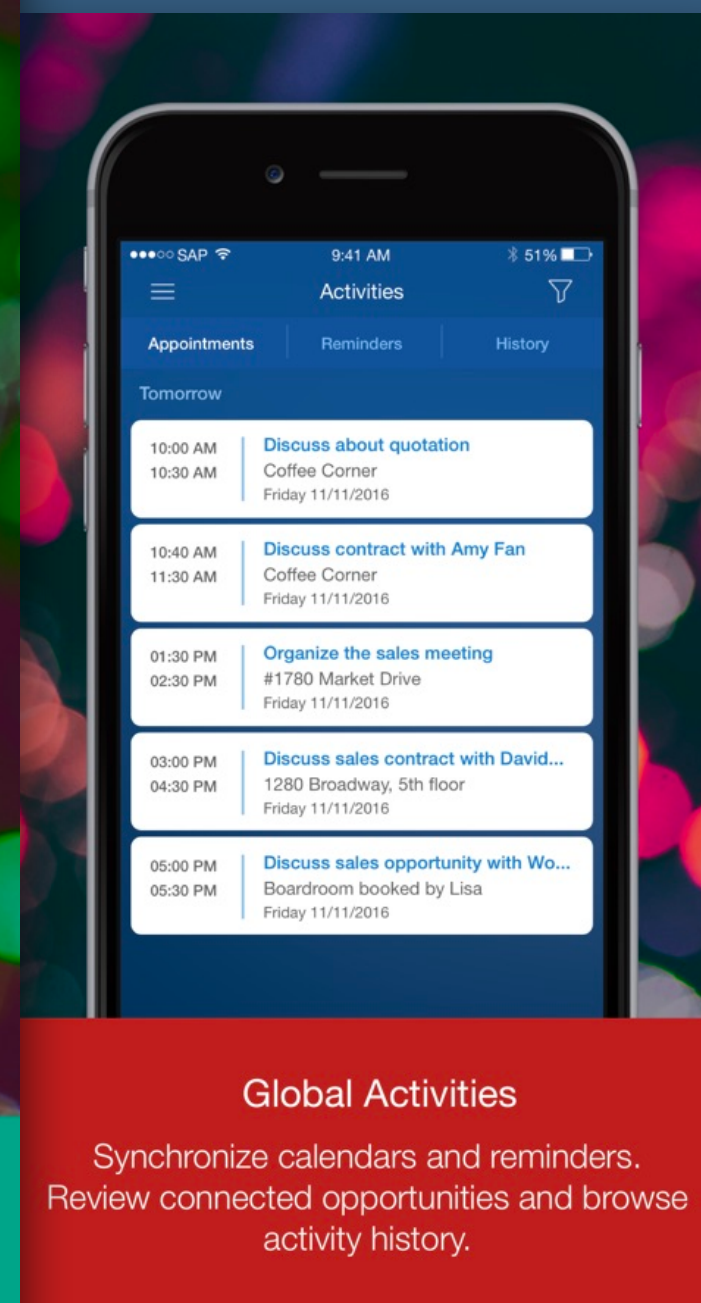
Stream

Your personal feed of insights, next steps and suggested actions.



Opportunities

Search, prioritize and track ongoing opportunities.



Global Activities

Synchronize calendars and reminders. Review connected opportunities and browse activity history.

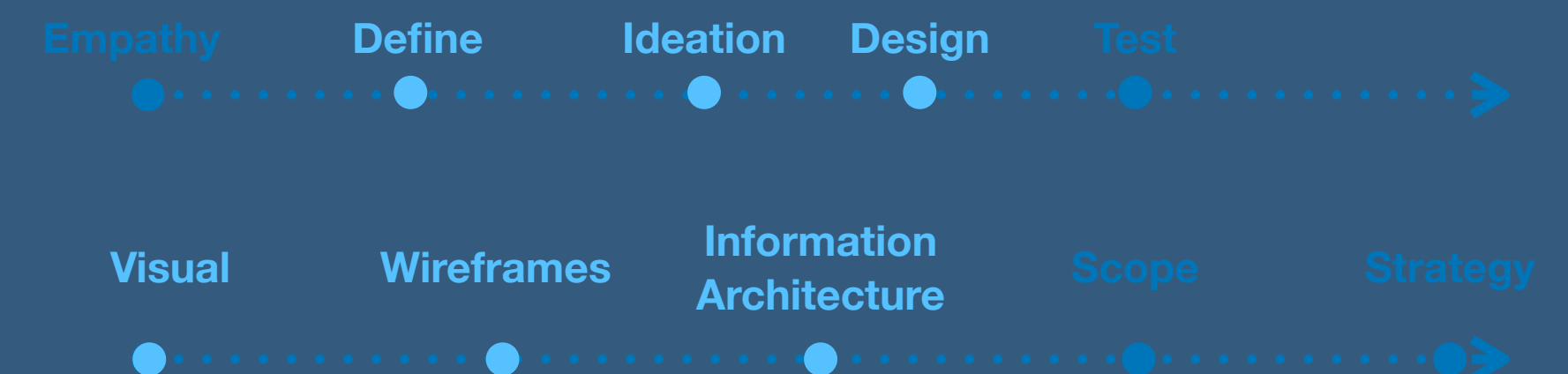
SAP Anywhere Stream Customer Relation Management (CRM) IOS APP

Assist sales manage their clients , activities and profit

Users: Sales

Period: 10/2016 - 04/2017

Role: UX/ Research



PROJECT | SAP Anywhere Stream



SAP Anywhere backend --> CRM App

PRODUCT GOAL

- Enrich the SAP ERP ecosystem, enable SAP clients who use Anywhere backend system, to manage their clients and update data with mobile device anytime.

DESIGN & RESEARCH GOAL

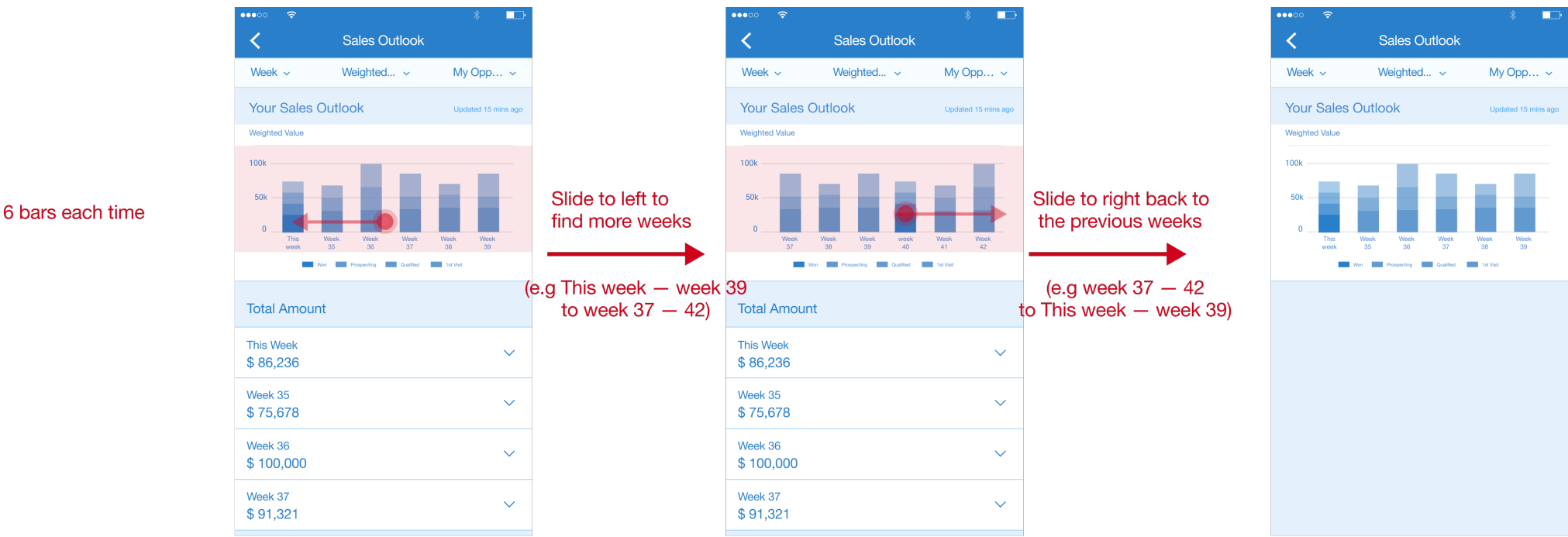
- Fluent user experience, consistent with backend ecosystem.
- Define user requirements --> optimise the information architecture.

MY ROLE

- **Design solution**: design low-fi prototype to map out the added requirement. Iterate the product with new features.
- **Evaluation**: walk through design proposals with project manager and development team on a daily basis。
- **Design spec**: create design spec and hand it over to UI designer and development team
- **User research**: redesign part of the information architecture, conduct interview with sales to get insight of their workflow, habit and priorities.
- **Competitive analysis**: construct a report of the information arrangement on competitive products.

Reference : <https://www.uxqiang.com/sap-anywhere>

PROJECT | SAP Anywhere Stream



Design consideration

- device size
- Gestures conflicts
- Information design
- Technical feasibility

PRODUCT GOAL

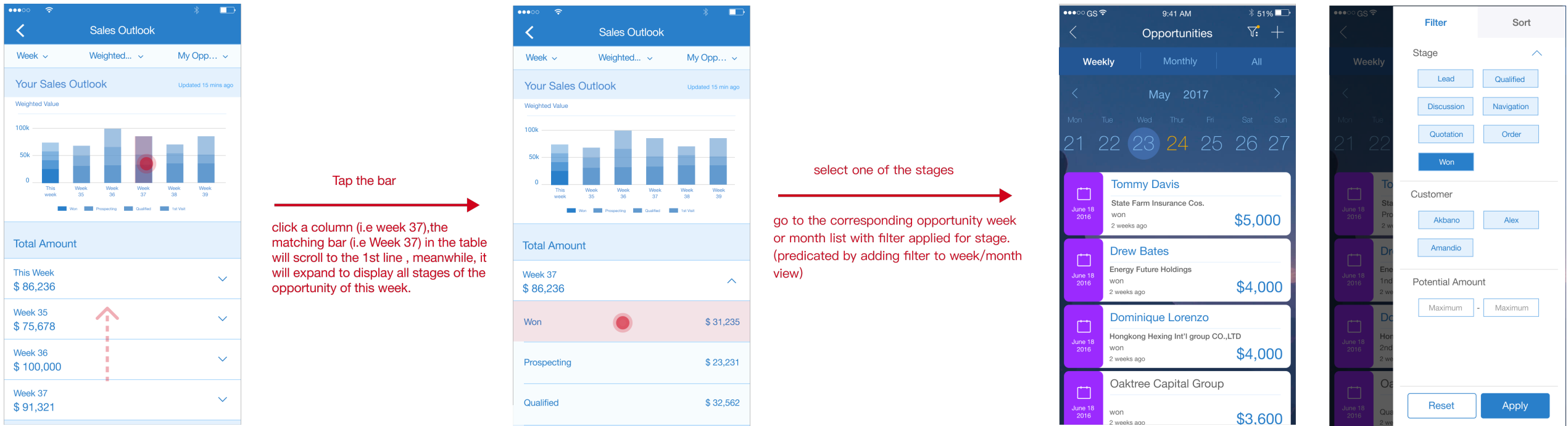
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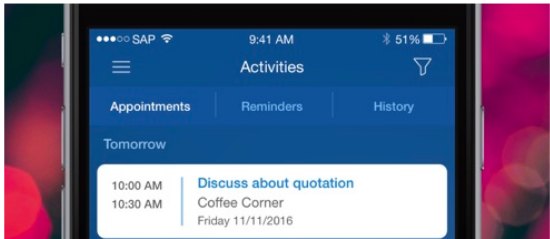


PROJECT | SAP Anywhere Stream

● Interview

Goal

- Redesign the information of activities



Structure

- working environment
- priority
- Scenarios (When. Where)
- Existing tools

Report

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PROJECT | SAP Anywhere Stream

Shared information

3. Activity (Event, Task, Call) in Home Page

Zoho CRM(4.0)

Events, tasks, calls

BASE(4.3)

Completed tasks, appointments

SalesForce(4.0)

Events, tasks, calls

Pipedrive(4.4)

Insightly(3.8)

tasks

Home

March 2017

12 13 14 15 16 17 18

Events

1:00 PM D

Tasks

Meeting High

Jira Lowest

Calls

Dog clothes 1:00 PM 02:02

Due Time

Creation time

Subject

Creator

Type

Priority

Create

Dashboard

OVERVIEW \$0.00

2 tasks

Wang attended an appointment 12:00 PM

Cc Thu, Mar 16 from 12:00 PM to 1:00 PM

Wang scheduled an appointment 11:53 AM

Cc Thu, Mar 16 from 12:00 PM to 1:00 PM

TEST TASK

Wang → Jira

Wang → Bruce

Wang → Text Contact for Wang

Wang attended an appointment 4:00 PM

meeting with jira unsolved Wed, Mar 15 from 4:00 PM to 5:00 PM

Wang completed a task → BB cuson 3:44 PM

Due Time

Creation time

Subject

Creator

Type

Priority

Create

Call - wang qin logged a call.

2h ago via Salesforce1 for iOS

By iPhone

Speech - wang qin created an event.

2h ago via Salesforce1 for iOS

Speech

Activity interview - wang qin created a task.

2h ago via Salesforce1 for iOS

Due Time

Creation time

Subject

Creator

Type

Priority

Create

Pipeline

Lead in 32,008 CNY - Bruce yu

HK deal 54,270 CNY - HK - Nicholas See

Deals

Tasks

My Tasks + Open

LATER

2. Invite your team Assigned To: Me

3. Save your emails to Insightly Assigned To: Me

4. Add your files and connect to your apps Assigned To: Me

5. Get our FREE mobile apps Assigned To: Me

Due Time

Creation time

Subject

Creator

Type

Priority

Create

3. Activity (Event, Task, Call) in Home Page

- If there is activity-related item in home page, the following info are definitely added ;
 - ✓ Subject (title of the activity)
 - ✓ Type (task/appointment/call)
 - ✓ Due time
- Based on different target users, each product put their emphasis on different info. (see the item marked red in the last slide)
 - ✓ E.g Zoho- subject, due time/ BASE-due time, subject / salesforce- creator, subject etc
- UI
 - ✓ Timeline
 - ✓ Card
 - ✓ List

4.1 Activity-Task/Reminder

Zoho CRM(4.0)	BASE(4.3)	SalesForce(4.0)	Pipedrive(4.4)	Insightly(3.8)
✓ Task (email, Call, Meeting, send letter, product demo, customized)	✓ Calendar (task, appointment)	✓ Task, event	✓ Activities (call, meeting, task, deadline, email, lunch)	✓ Task (follow-up, get started, meeting, phone call, to-do)
✓ Category/subject	✓ Category/subject	✓ Category/subject	✓ Category/subject	✓ Category/subject
✓ Start date	✓ Start date	✓ Start date	✓ Start date	✓ Start date
✓ Due date	✓ Due date	✓ Due date	✓ Due date	✓ Due date
✓ Contact	✓ Contact	✓ Contact	✓ Contact	✓ Contact (add in opportunity)
✓ Deals	✓ Deals	✓ Deals	✓ Deals	✓ Deals(same)
✓ Assignee/owner	✓ Assignee/owner	✓ Assignee/owner	✓ Assignee/owner	✓ Assignee/owner
✓ Comments/Description	✓ Comments/Description	✓ Comments/Description	✓ Comments/Description	✓ Comments/Description
✓ Alert/ Repeat/ Email notification	✓ Alert/ Repeat/ Email notification	✓ Alert/ Repeat/ Email notification	✓ Alert/ Repeat/ Email notification	✓ Alert/ Repeat/ Email notification
✓ Priority	✓ Priority	✓ Priority	✓ Priority	✓ Priority
✓ Progress	✓ Progress	✓ Progress	✓ Progress	✓ Progress
✓ Status	✓ Status	✓ Status	✓ Status	✓ Status
✓ Recurring	✓ Recurring	✓ Recurring	✓ Recurring	✓ Recurring
✓ Permission	✓ Permission	✓ Permission	✓ Permission	✓ Permission

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