

# KNOCK SHEET MOBILE NATIVE APP (IOS)

UI/UX | IA | IxD | Illustration | Research

## KnockSheet - Sales Rep Platform

Project Duration  
4 months

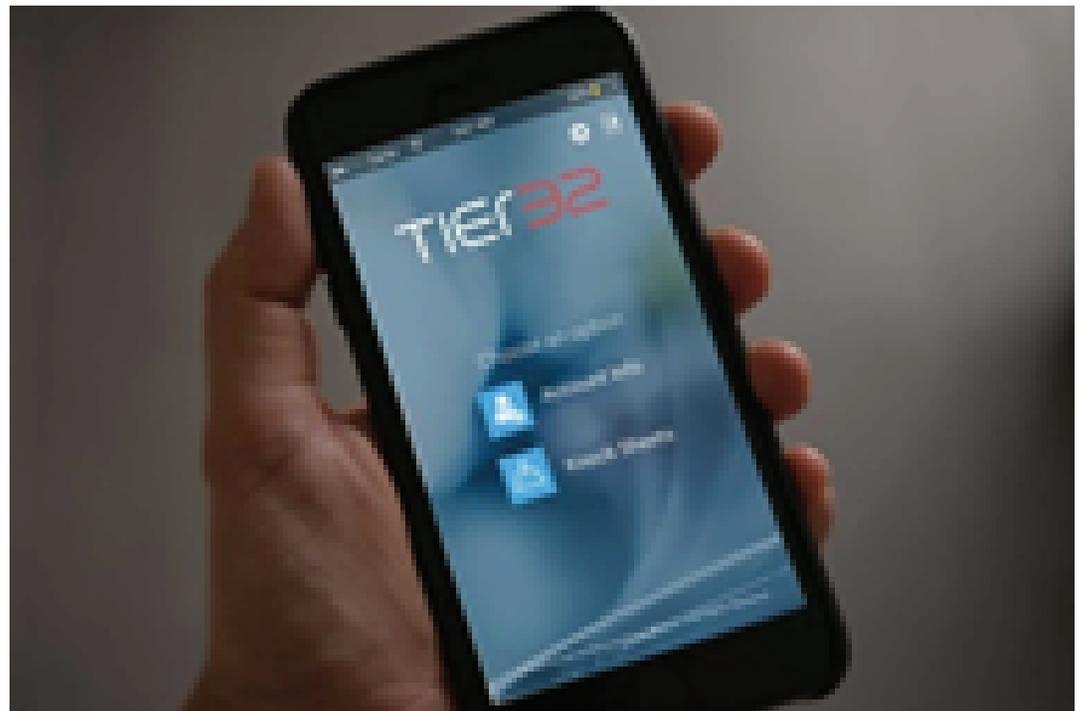
Client  
AMP security

Team  
Satya Janakiram(UX)  
Sales Team, Product Team  
Engineering team, Tech Support

My Role  
User Researcher,  
UI/UX Designer

### The Brief:

Knocksheet is the complete outside sales app. A sales enablement service and mobile CRM designed specifically for outside sales, including field sales and door-to-door sales teams. Our CRM app provides solutions for lead tracking, lead management, and all your other field sales.



### Interviews, Observation and User Persona:

**Frankline P**

Photo

"For all home owners and businesses, get the best home security by that day"

Occupation: Sales Representative  
Workgroup: Door-to-Door Sales  
Sector: Sales  
Location: Pleasant Grove, UT  
Language: Polite

**Bi:**  
Frankline is Knocksheet Sales Rep working with AMP Security for sales from past 3 years. Worked in retail and marketing prior to AMP Security. Comes in and catch up on email to look for new sales area assigned. Work those requests if I have time I then work on data entry /reconciliation and Data requests. The primary goal is to followup with clients to see if they are satisfied with the service and installation of Home security.

**Goals**

- Prioritize the clients based on the urgency.
- Client Dashboard - Determine Eligibility
- Data Explorer - Pull Monthly Report

**Frustrations**

- New User

**Technology:**

- IT and Internet
- Using Software
- Using Mobile Apps
- Learning New Technology

**Devices & Platforms:**

- Smartphone
- Tablet
- Laptop
- iOS
- Android
- Windows

**Preferred Browser:** Firefox

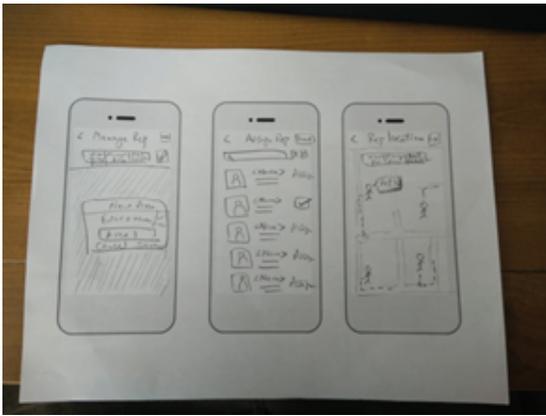
**User Experience Goals:**

- ORGANIZED
- INTUITIVE
- RESPONSIVE
- FUNCTIONAL
- SECURE DATA

### Getting to know our users

We managed to do 8 interviews to get all the qualitative data we needed and then completed that with an online survey for quantitative data. We decided to do this that way this time because we already had a specific panel of Sales Representatives that we could contact and they were all semi-professional / professional ones so we wanted to understand their habits and needs first and then confirm tendencies with a more general survey.

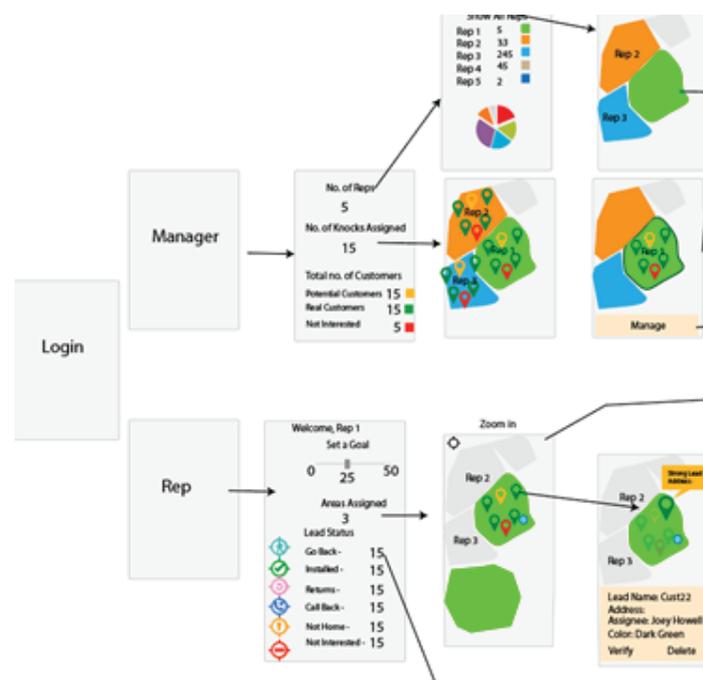
## Sketches / Storyboard:



The cool thing about this process is its' fast and make better ideas. Regardless of who owns the idea, the whole team decides what's best.

We collectively create the vision. It means during the development everyone-including the developer- is confident to make assumptions and decisions. It's much more efficient than instituting a hierarchy.

## Work Flows:



## Competitor UX analysis:

### 1. Identify competitors:

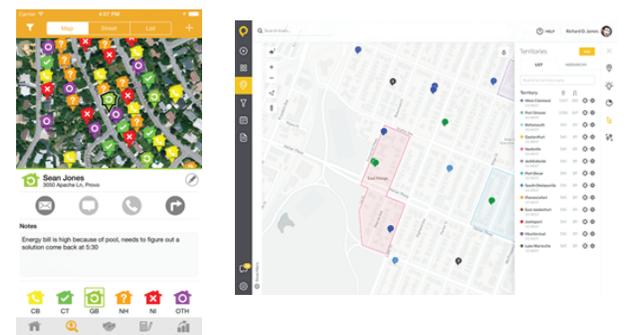
Even though there are many competitors, we settled on Sales Rabbit as the direct competitor and Spotio for the indirect competitor.

2. Content and navigation: The labels of Sales Rabbit's main navigation have quite a lot of links and are quite small, which might confuse the user.

3. Aesthetics and style: Sales Rabbit's use of color is not reinforcing the brand.

4. Heuristic analysis: Sales Rabbit's form validation has clear notification messages to explain to the user what's gone wrong and what's expected.

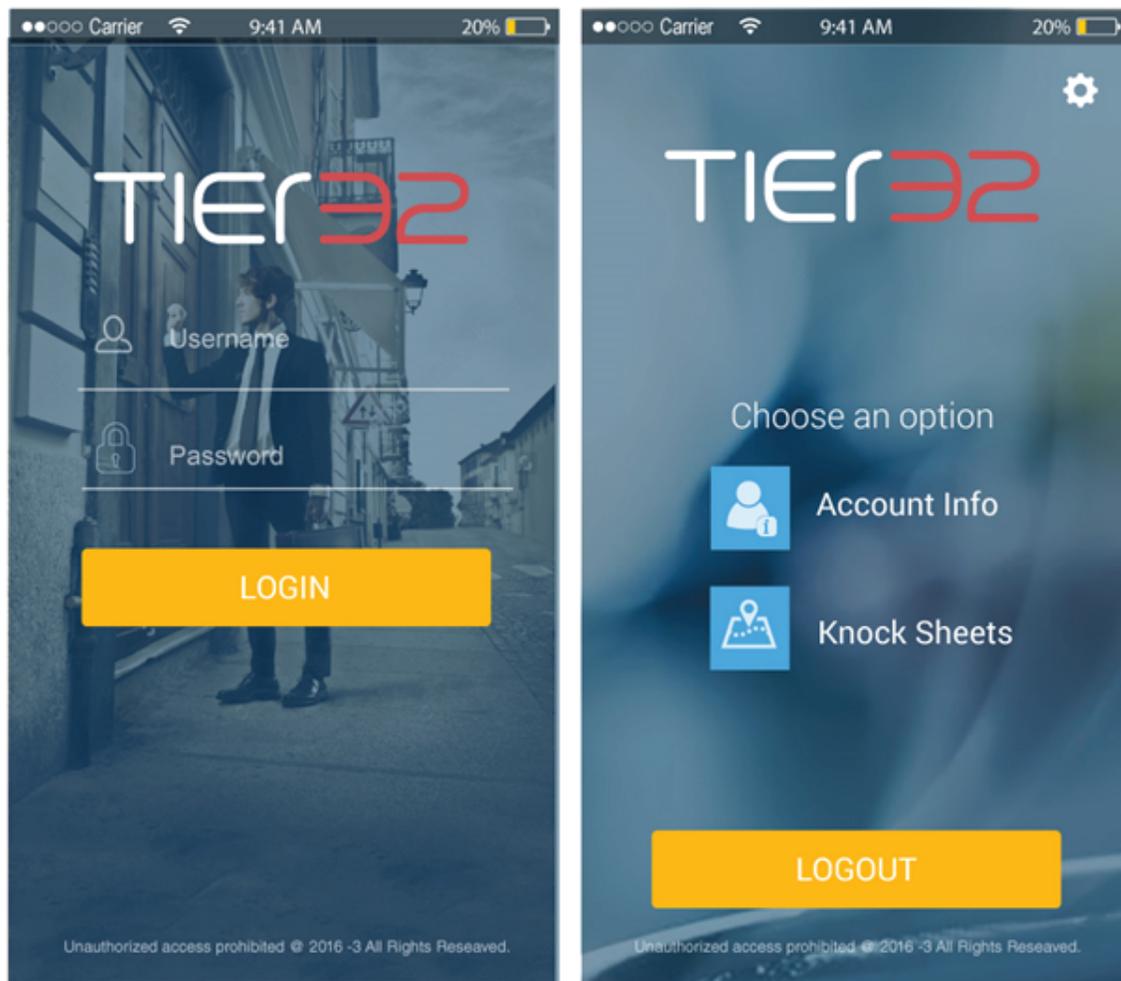
5. UI animations: Sales Rabbit's seems to have no UI animation, except when the main navigation expands. Moving through the app pages has a jerky effect and there are not smooth transitions from one page to another.





## Mockups:

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## Prototype:

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<https://invis.io/2Y9NUUSZF>