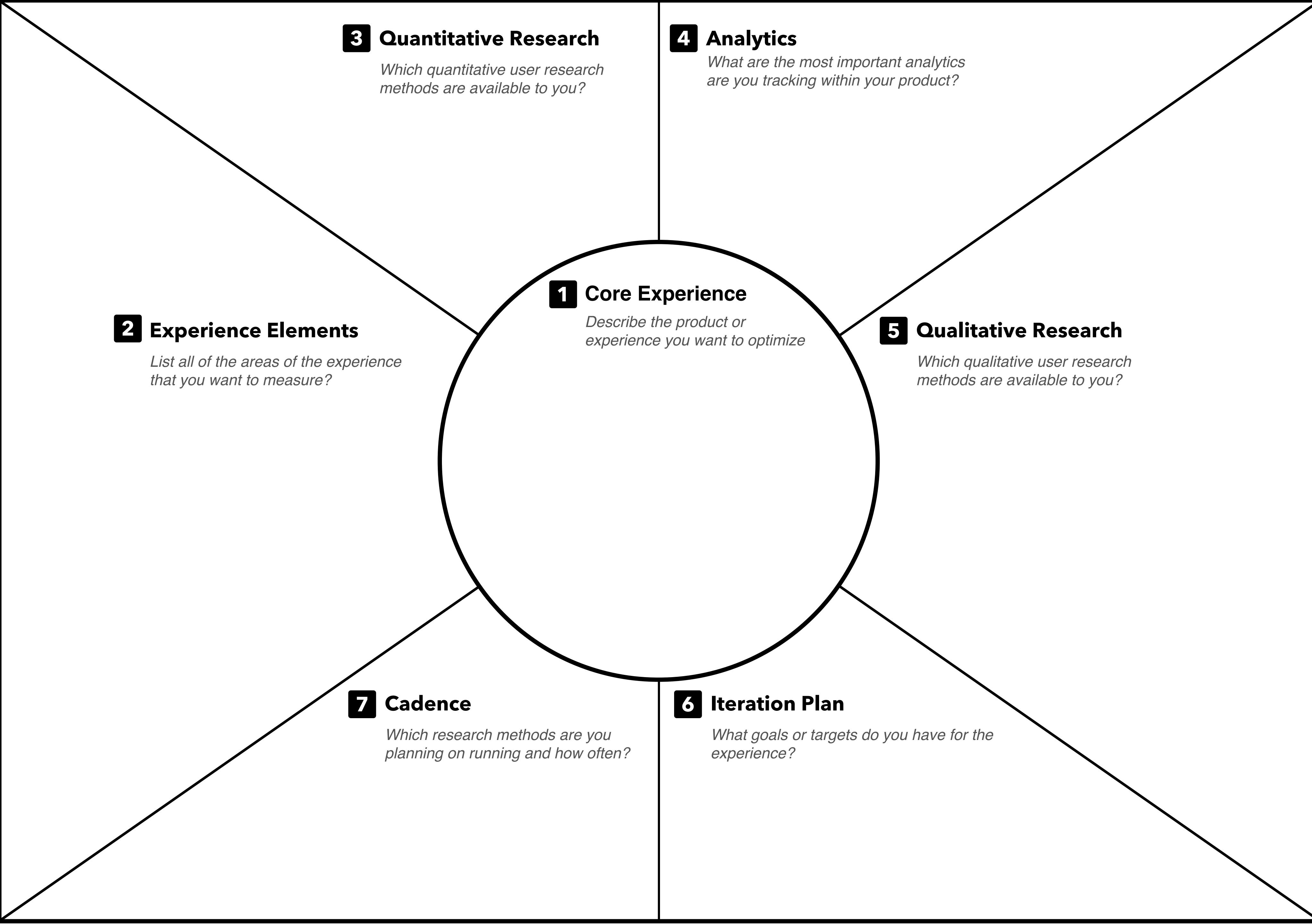
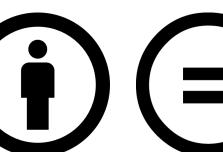
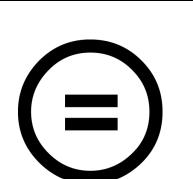
Optimization Strategy Map

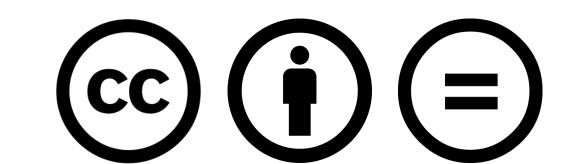








Quantitative Research Analytics What are the most important analytics Which quantitative user research are you tracking within your product? methods are available to you? # Contacts Created A/B Testing # Emails templates created user Surveys # Emails sent ux Benchmarking # Custom Workflows created **Core Experience** Describe the product or **Experience Elements Qualitative Research** experience you want to optimize List all of the areas of the experience Which qualitative user research that you want to measure? methods are available to you? SAAS CRM Platform for SMBS Pipeline Dashboard usability testing Communication Tracker User interviews Email Template Designer Workflow Automation Tool Cadence **Iteration Plan** Which research methods are you What goals or targets do you have for the planning on running and how often? experience? 70% Email template adoption 4 A/B tests / mo. 50% Workflow tool adoption 2 Surveys / quarter 20% Reduction in workflow creation 1 usability tests / design iteration ux Benchmark after ea. major release support calls



What do you know?

What have you learned from analytics, qualitative research and quantitative research?

What is your hypothesis?

Based on what you know, describe the problem and a possible solution.

What will you test?

How will you test your hypothesis? What does the proposed solution look like?

What is your Primary Metric?

Which single measure will you use to determine success?

What are your Secondary Metrics?

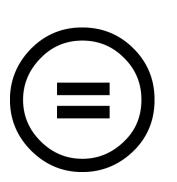
Which other metrics will you use to help determine next steps? (health metrics, do no harm metrics, etc.)

How will you iterate?

How will you follow up after you test your hypothesis?







What do you know?

What have you learned from analytics, qualitative research and quantitative research?

50% of users do not complete workflow creation

78% abandon at setting up triggers step

Spike in customer support calls

What is your hypothesis?

Based on what you know, describe the problem and a possible solution.

users are not sure how to start

Trigger set up is confusing and has too many steps

What will you test?

How will you test your hypothesis? What does the proposed solution look like?

Provide some predefined triggers that can be used outof-the-box or further customized

What is your Primary Metric?

Which single measure will you use to determine success?

% completed workflow creations

What are your Secondary Metrics?

Which other metrics will you use to help determine next steps? (health metrics, do no harm metrics, etc.)

Customer support inquiries

How will you iterate?

How will you follow up after you test your hypothesis?

Roll to production if successful. Keep iterating until 95% workflow completion rate





