IBRAHIM TANNIRA

USER EXPERIENCE RESEARCHER + PRODUCT STRATEGIST

This is a low resolution portfolio for the purposes of sharing over the internet.

ABOUT ME

I am a **UX researcher** with 7 years of professional experience and **3 years in user experience research**.

I'm skilled at qualitative and quantitative research methods, data analytics, and reporting.

I love listening to users' stories and have a keen ear for honing in on the core problems, designing well-informed experiences, and creatively communicating those insights to inform product strategy.

In my next role, I want to join a company with a strong UX and research culture, working as a UX Researcher.

———

I am currently located in Providence, Rhode Island and willing to relocate for the right opportunity.

MY AREAS OF FOCUS

Research tools:

Optimal Workshop

UserTesting

Validately

Userlytics

Design tools:

Sketch

InVision

Adobe XD CC

Balsamiq

Zeplin

Qualitative Research

Versed in user interview and usability tests to generate and/or evaluate user experiences. Also experienced in conducting tree testing and card sorting studies to inform information architecture.

Quantitative Research

Experienced in analyzing large amounts of data using Excel and presenting trends to inform research and/or product strategy.

Prototyping

Skilled at creating and testing lo-fi and hi-fi prototypes.

MY PROJECTS

SOME OF MY PROJECTS

Researching the Company's Wiki

Using in-person and remote research methods to understand employees' challenges using a 10-year old Wiki and the opportunities for improving it.

WHAT I DID

Mixed Method Research

COMPANY

ASAL Technologies

The Wiki Part 2: Prototype to MVP

Engaging research findings to design, develop, and test a new Wiki that would replace the 10-year-old Wiki.

WHAT I DID

Design and Usability Testing

COMPANY

ASAL Technologies

What is wrong with the sales process?

Applying qualitative research to understand challenges facing the sales team and identify opportunities to accelerate the sales cycle.

WHAT I DID

Qualitative Research

COMPANY

ASAL Technologies

Why is recruitment taking too long?

Utilizing surveys and user interviews to understand the challenges in the recruitment process and how those challenges affect the sales cycle.

WHAT I DID

Mixed Method Research

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WHAT I DID

Mixed Method Research

COMPANY

ASAL Technologies

Researching the Company's Wiki

Investigating a Decade-Old Product

PROJECT SUMMARY

Understanding pains, behaviors, and goals behind using the company Wiki. Identifying gaps between employee needs and what the Wiki provides.

Client: ASAL Technologies

Team:

· Product manager (myself)

· UX researcher (myself)

· 2 developers

TIMELINE

3 weeks

MY RESPONSIBILITIES

• Quantitative Research

• User Interviews

• Information Architecture

• Lo-Fi Prototype

• Usability Testing

Tools

• Balsamiq

• Zoom

THE CLIENT

ASAL Technologies is a software outsourcing company. ASAL helps clients establish remote software engineering teams based in Palestine.

THE PRODUCT

An internal Wiki dedicated to providing employees with all of the information they need related to their company's policies and day-to-day employee needs.

PROBLEM STATEMENT

66% of employees hated going to the wiki because finding the information they're looking for was difficult or impossible at times.

CLIENT'S GOAL

Help employees reclaim their time by re-establishing the company's Wiki as the primary hub for all information employees might need throughout their day.

01. WHAT I DID

Utilize quantitative and qualitative research methods to understand employee needs and goals when using the Wiki.

In this research project, **we planned and conducted 15 in-person and remote interviews and 9 usability tests** with stakeholders, existing users, and potential users in Palestine.

1	4	11	9
SURVEY	STAKEHOLDER INTERVIEWS	USER INTERVIEWS	LO-FI USABILITY TESTS
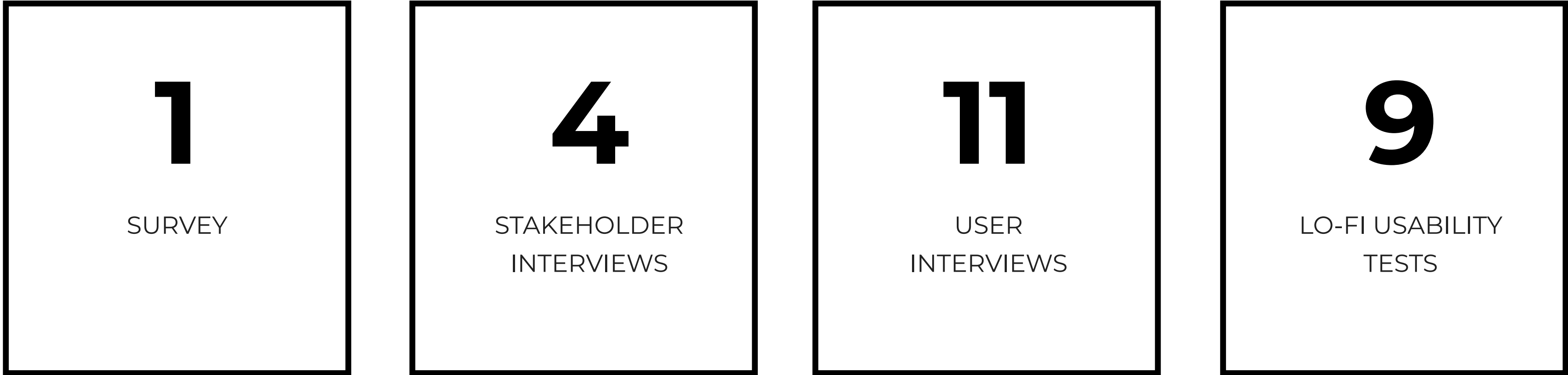
We adopted the double diamond design process over a period of 3 weeks to research, design, and test our solution.

From research to testing in 3 weeks

Our research was broken into 2 phases:

Phase 1: Collecting and analyzing information	**Phase 2: Designing and testing lo-fi prototypes**

- Stakeholder interviews
- Survey
- User interviews
- Interview synthesis
- Personas
- Flow charts

- Ideation
- Sketching
- Lo-Fi prototypes
- Usability testing

The participant screener was aimed at **identifying the regular users of the Wiki and their reasons for using it**.

Critical questions in the screener included:

How do you access the Wiki? *

○ I bookmarked it in my browser

○ I have a pinned tab on the browser

○ I type in the address and it autofills from the history

○ What is the wiki?

Why do you use the Wiki? (Check all that applies) *

☐ Find colleague emails

☐ Find colleague phone numbers

☐ Find where people are sitting

☐ Check Rawabi bus schedule

☐ Find health insurance network doctors

☐ Access technical resources

☐ Other...

58 survey responses helped shape our user interview strategy.

Some of the preliminary key insights:

66% use the Wiki on a **daily or weekly** basis.

79% use the Wiki to figure out **where a colleague sits.**

69% use the Wiki to find **colleague contact information.**

46% use the Wiki to find **health insurance information.**

74% of the Wiki **content was untouched** by employees.

The survey revealed many pain points revolving around the **user interface**, **information architecture**, and **content**.

Information Architecture | **User Interface**
66% of employees did not use the transportation calendar

Information Architecture | **User Interface**
77% of users did not realize that a search bar existed

Content
6 out 10 'Hot links' were not used or relevant to employees' day-to-day needs

Information Architecture | **Content**
An colleague's contact information was listed on 3 separate pages

The **user interface**, **information architecture**, and **content** challenges continued throughout the main page.

HR Forms and Links

- compensation_form_asal_wfh.pdf
- generic_agenda.doc
- generic_meeting_minutes.doc
- pts-_hr_user_guide.pdf
- pts-employee_user_guide.pdf
- branch_office_telecommuting_policy.pdf
- list_of_official_holidays-asal_2019.pdf
- remote_work_policy.pdf
- referral_program.pdf

Information Architecture	User Interface
8 out of 9 files were not used	

ASAL Insurance

- Work Insurance
- Health Insurance
- Personal Accident Policy

Information Architecture	User Interface
Only 1 link was being used (Health Insurance)	

ASAL Calendar

- How to Share Your Calendar with WebDAV (Outlook and WorldClient)
- WorldClient users: How to Open Shared Calendar
- Outlook users: How to Subscribe to a Published Calendar

Information Architecture	User Interface
Only 3 people in the 300-employee company had shared calendars set up	

ASAL Systems

Information Architecture	User Interface
7 of the ASAL Systems were down and their links gave a 404 error "page not found"	

- ASAL New WiKi IP address : http://172.22.1.130
- ASAL Mail (Internal Access) IP address : https://172.22.1.80
- ASAL HelpDesk IP address : http://172.22.1.19
- ASAL File Server IP address : \\172.22.1.73
- ASAL SVN Server IP address : https://172.22.1.10/svn/
- ASAL Reservation IP address : IP address : http://172.22.1.13:8080/portal
- ASAL Careers (CATS) IP address : http://172.22.1.13/Careers/
- TestLink IP address : http://172.22.1.139/testlink/index.php
- Bugzilla IP address : http://172.22.1.14/bugzilla
- ASAL Evaluation IP address : http://172.22.1.141/

Based on the survey findings, we identified key follow-up areas that we wanted to learn more about using more in-depth interview sessions.

4 Stakeholder Interviews

- Understand the original goal behind creating the Wiki
- Identify how and why the current Wiki fails to meet present expectations

10 Wiki User Interviews

- Understand the daily habits that lead users to the Wiki
- Discover the pain points and the difficulties users face with the current system
- Unveil users' expectations

Stakeholder and user interviews revealed a lack of trust in the Wiki information and frustrations with accessing it.

Lack of trust in the system	"Asking an employee to access the Wiki is like asking them to enter a jungle." **- Manager**
Non-user friendly interface and outdated information	"The UI is so outdated and there are a lot of broken links." **- Employee**
The information breakdown is incoherent	"I have to open 3 separate links to find a colleague's information." **- Employee**

01. WHAT I DID

02. THE PROCESS

03. RESEARCH SESSIONS

04. FINDINGS

Through affinity maps we grouped common insights and highlighted the main themes

The users had misgivings about a system with broken links and a lack of logical structure for content.

Outdated user interface

The UI is overwhelming to the eyes and the information is not easy to skim through

Incoherent information architecture

Achieving the most common goal—finding a colleague's contact information—was the most frustrating due to splitting of that information across multiple pages

Broken links and missing content

Delay in updates due to the difficulty of using the admin panel

Inability to update information

The admin panel was so not user-friendly that department heads could not use it and instead relied on a busy IT department to upload new information

Overwhelmed new hires

New hires were overwhelmed by the amount of information they were required to go through without any guidance

Accessibility

The Wiki was not accessible from outside of the company premises and was not mobile friendly

2 main personas used the Wiki on a regular basis.

Tahani: The team leader

Tahani is a software engineer lead. Her role revolves around working with project managers, clients, and her team members. Tahani sets and attends many meetings throughout the week.

Goals
- Get in touch with colleagues outside of the team to set up meetings
- Figure out where her trainees are sitting to go to their cubical and mentor them

Pains
- Aimlessly scrolling through the Wiki before finding the links to employees' information
- Having to visit multiple links to find the full contact information of a colleague

Moe: The dad with sick kids

Moe is a software engineer. He is 28 and married. He has 2 little kids and takes them to the doctor often.

Goals
- Get his kids checked out and treated by arranging an affordable doctor's appointment through the medical network covered under the company's insurance

Pains
- Difficulty of finding a doctor's contact information when accessing the medical network information
- Inability to access medical network information when not on company premises

Setting up a meeting required 12 steps due to lack of productivity tools like MS Exchange, shared calendars, and instant messaging software. This was a key user flow that we sought to improve.

```
Access Wiki  →  Navigate to phone      →  Scroll to find        →  Call colleague  →  Agree on a meeting  →  Go to Wiki home
                directory                 colleague name/                             date/time              page
                                          number
                                                                                                                    ↓
Navigate to the  →  Find a meeting  →  Go to Wiki home  →  Navigate to the  →  Scroll to find     →  Send meeting email
floor map page      room                page                email directory      colleague email       calendar invitation
                                                            page
       ↓
Go to meeting
```

Finding a doctor took 8 steps and the pain of scrolling through a 7 page unsearchable PDF to find a doctor's contact information.

Access Wiki → Navigate to health insurance page → Find medical network PDF → View/download PDF → Scroll through list of doctors → Find doctor information → Call doctor's clinic → Set up appointment → Go to appointment
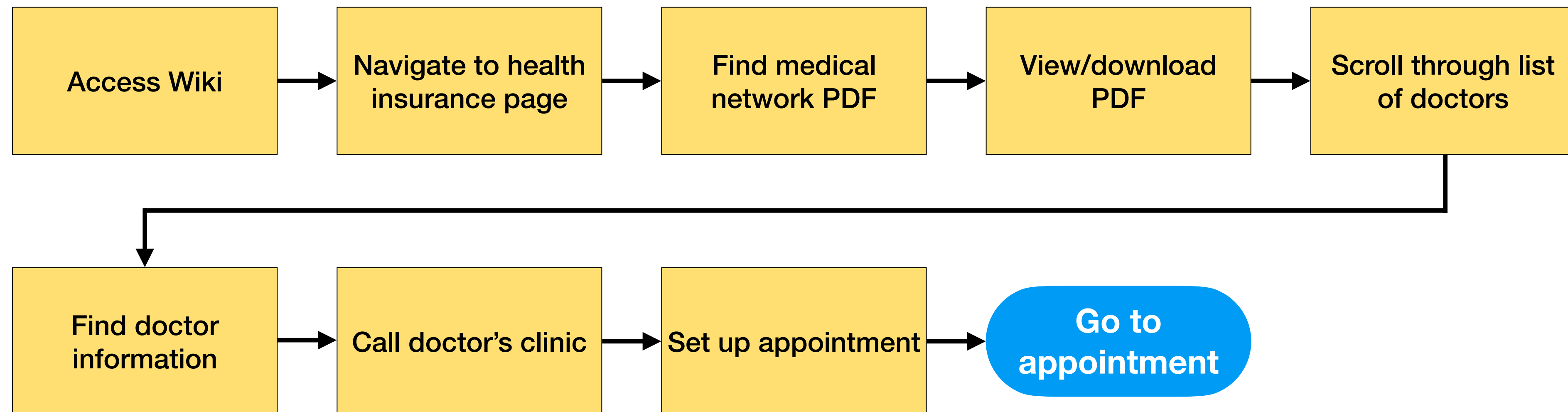
We brainstormed 16 different solutions to improve the information organization and findability.

1 A search feature would be the main way to find anything
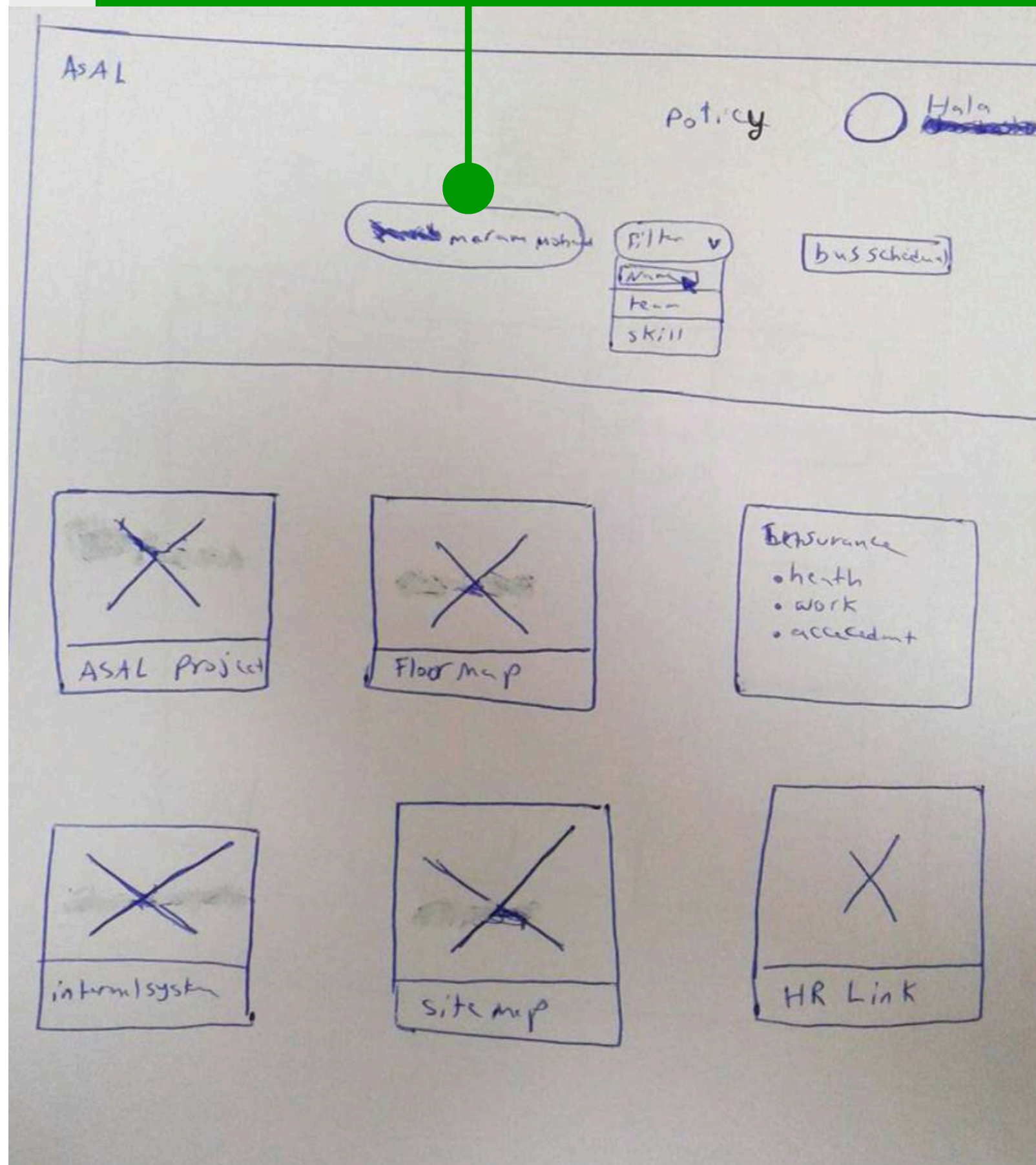
2 Searching for an employee displayed their location and basic information
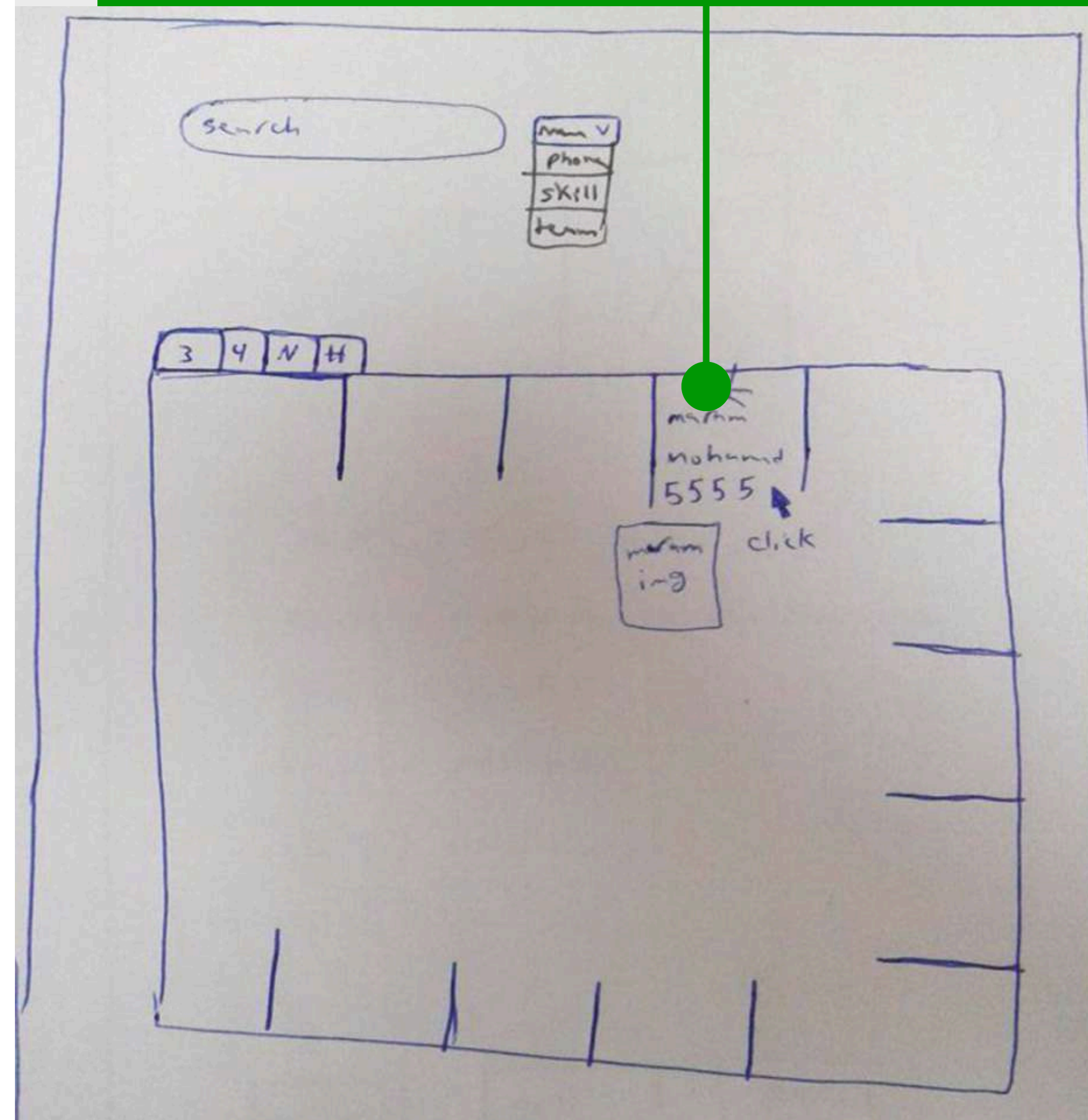
3 Clicking on an employee would prompt all of their information
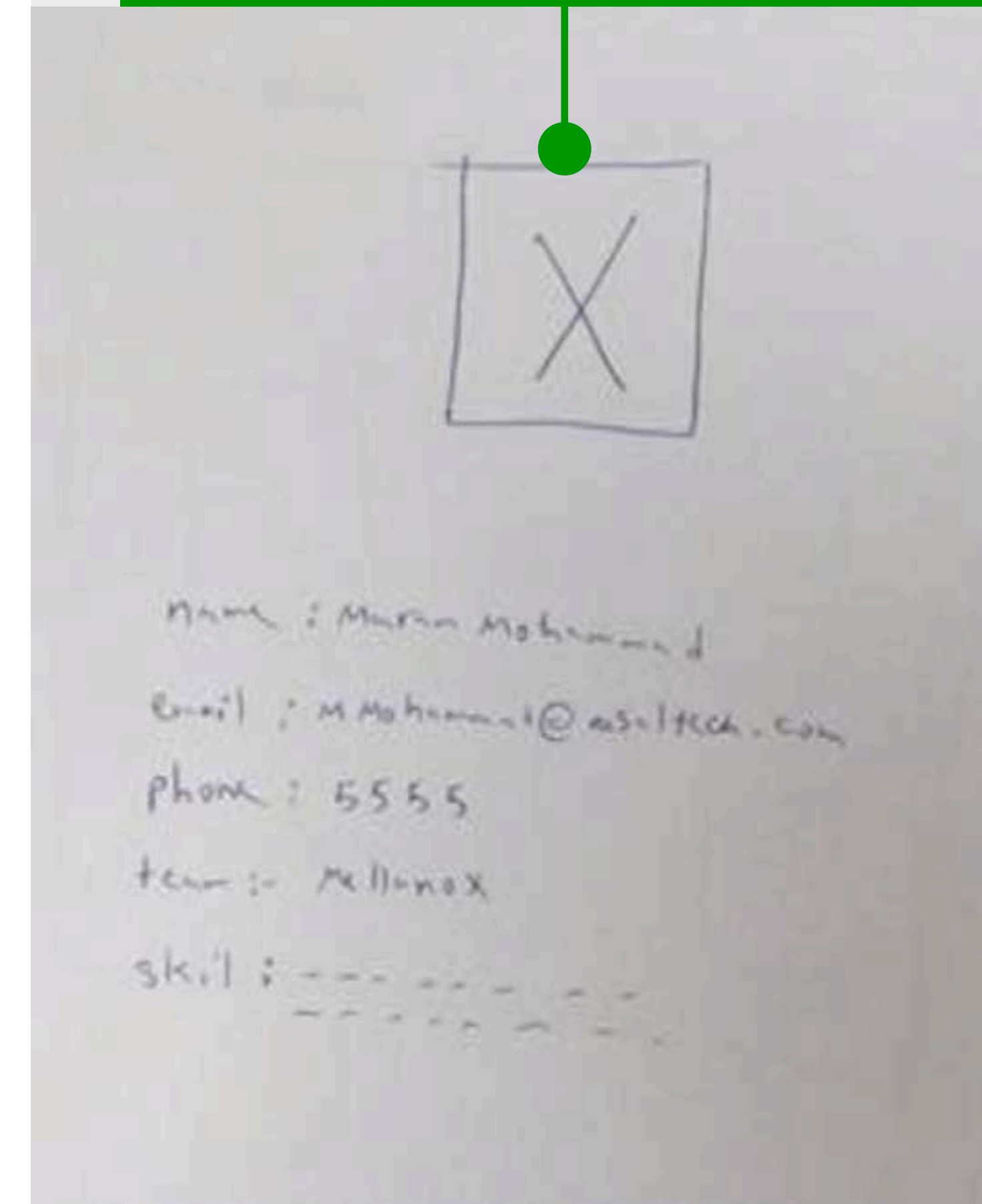
Using Balsamiq, I created a lo-fi prototype to take into usability testing sessions and validate our solution.

1 Type a name to search

2 Results prompts colleague location

3 Clicking on colleague prompts all of their information
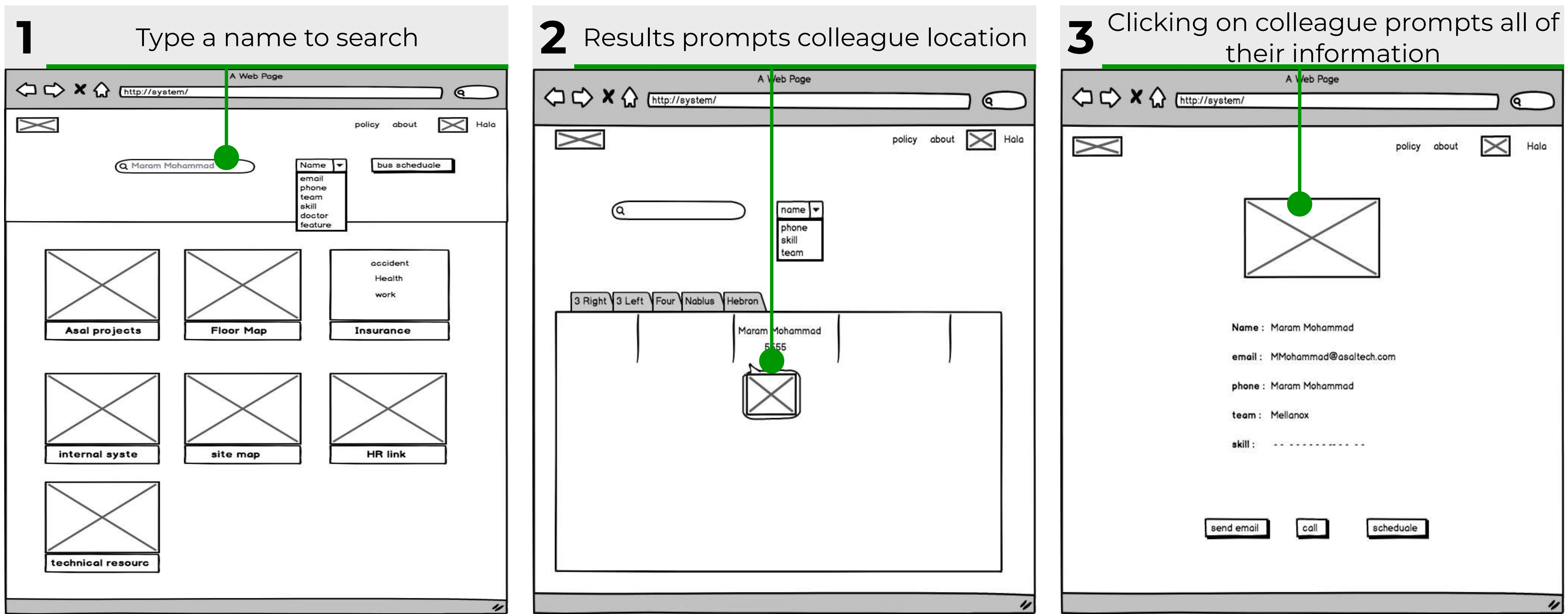
In the new solution, finding a colleague or a doctor's information was a 2 step process.

The Final Deliverables

A Feature Prioritization Chart

The prioritized feature list helped inform the second phase of the project while ensuring that our prototype development scope was doable within the time allocated.

A Product Roadmap

Our simple product roadmap helped us highlight the prototype vision and align expectations before committing to a full solution.

Our feature prioritization chart informed the next phase of the project.

High Impact

	Accessibility from outside premises	Rebuild homepage IA and UI
	Search functionality for colleague contact information	Aggregating employee contact information in one place
Company news feed	Chat	
Employee HR service center	Mobile friendly	Search functionality for health insurance and doctor network

Unexpected ———————————————————————— Expected

Interactive company org chart	Informative & interactive company processes	Company knowledge sharing portal	Admin cPanel
Notifications on updates	Personalized quick access on home page	

Low Impact

Minimal Usable Product Roadmap

After identifying the product features and priorities, we created a roadmap to inform our prototype development plan.

	Week 1					Week 2					Week 3					Week 4					Week 5				
Mail Server API	█	█	█	█	█																				
Home Page Development	█	█	█	█	█																				
Log-In Feature						█	█	█	█	█															
Search Engine						█	█	█	█	█	█	█	█	█	█										
Contact Information																█	█	█	█	█					
Doctor Information																█	█	█	█	█					
Usability Testing																					█		█		
Feedback & Bugs																						█		█	█

In the next project

The following project will look at how we created a prototype from these research findings and how we crafted the prototype into an MVP.

The Wiki Part 2: Prototype to MVP

Usability Testing Throughout Product Development

PROJECT SUMMARY

Design, develop, and test an MVP based on the research findings in the previous project

Client: ASAL Technologies

Team:

· Product manager (myself)

· UX researcher (myself)

· 4 developers

TIMELINE

8 weeks

MY RESPONSIBILITIES

• User interface design

• Usability testing

• Product management

Tools

• Sketch

• InVision

• Zeplin

THE CLIENT

ASAL Technologies is a software outsourcing company. ASAL helps clients establish remote software engineering teams based in Palestine.

THE PRODUCT

An internal Wiki dedicated to providing employees with all of the information they need related to their company's policies and day-to-day employee needs.

PROBLEM STATEMENT

Previously we identified the need to redesign the Wiki due to its **outdated design, confusing information architecture, and misleading content**.

CLIENT'S GOAL

Design a user friendly, accessible, and engaging Wiki based on the research findings from the previous project.

We identified two main personas who used the wiki on a daily/weekly basis.

Use case 1

Tahani: The team leader

Tahani is trying to get different colleagues' contact information and cubical locations to set up a meeting.

Use case 2

Moe: The dad with sick kids

Moe needs to find a doctor for his kids within the medical network covered by the company's insurance.

01. WHAT I DID

Understand employee needs and goals when using the Wiki. Solve the challenge of information distribution and create a more intuitive interface.

02. THE PROCESS

03. RESEARCH SESSIONS

04. FINDINGS

In this project, we utilized the previous research findings to design, develop, and test a high-fidelity Wiki prototype that we would develop into an MVP.
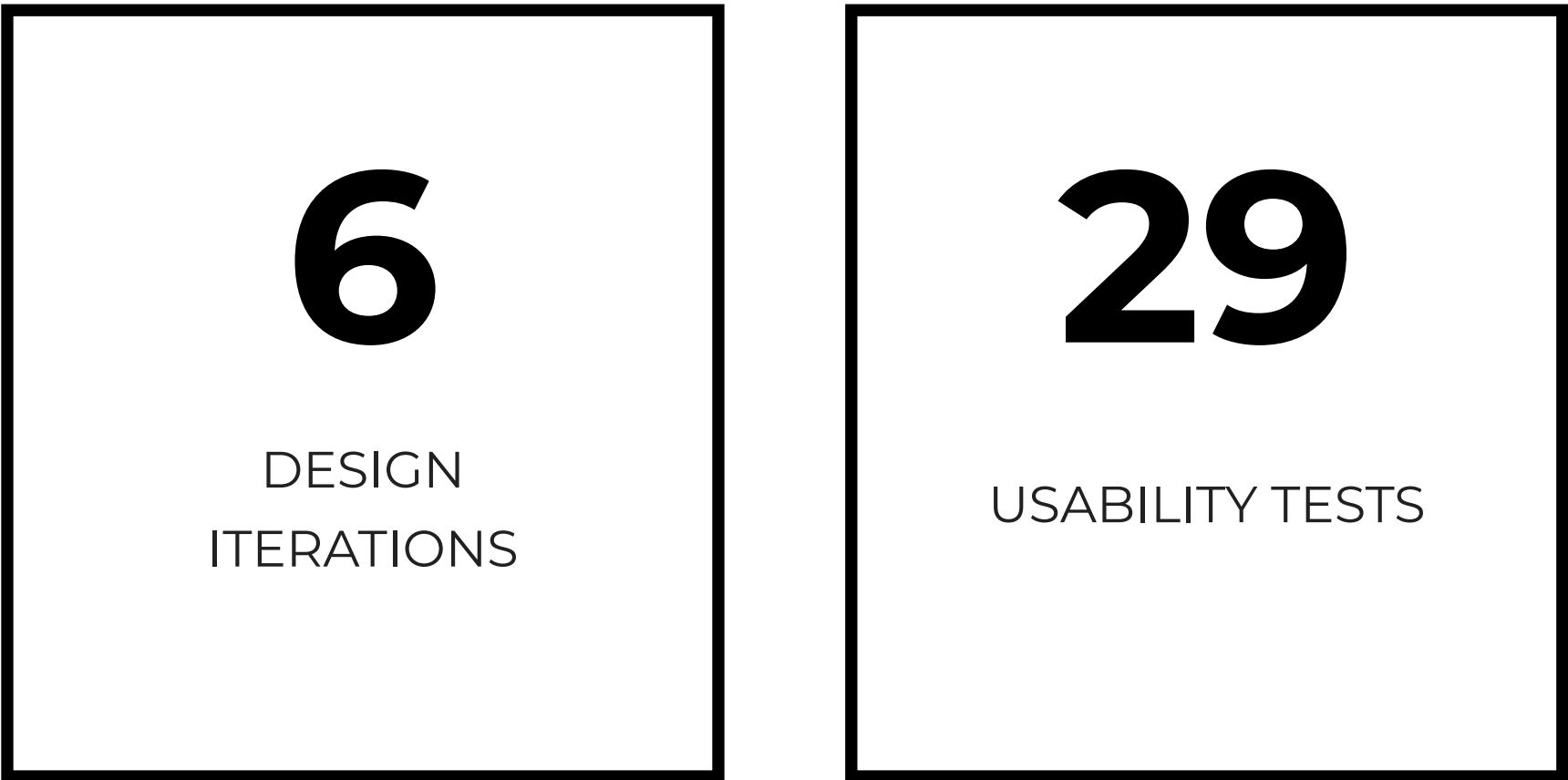
6

DESIGN
ITERATIONS

29

USABILITY TESTS

From prototype to MVP in 8 weeks

Our design and development was broken into 2 phases:

Phase 1: Prototype design and development	Phase 2: MVP design and testing
• Design • Development • Usability testing	• Analyzing prototype feedback • Re-design • High-fidelity testing • Design iterations • MVP development

Our prototype experience centered on a search functionality, while giving quick-access shortcuts to the most-used sections of the Wiki.

Home   HR Links   Internal System   Knowledge Center   About Asal

Search   Are you look for staff contact information?HR forms?

A search feature allowing users to search any content in the Wiki

The most used features were highlighted through quick-access shortcuts

Floor Map   Find Doctor   Rawabi Transportation

Recents Posts

SEP 07   **What If They Let You Run The Hubble**
In order to discuss the general function of the logo, we must firstly identify and define the environment where this will have to fulfill its function. The environment is called
Read more...

SEP 07   **What If They Let You Run The Hubble**
In order to discuss the general function of the logo, we must firstly identify and define the environment where this will have to fulfill its function. The environment is called
Read more...

SEP 07   **What If They Let You Run The Hubble**
In order to discuss the general function of the logo, we must firstly identify and define the environment where this will have to fulfill its

Let's welcome Ibrahim Tannira to ASAL

Position: Software Engineer

Site: Rawabi

Starting Date: Aug 8, 2018

A company news carousel replaced HR company-wide emails

Recent posts from the company internal knowledge center (similar to stack overflow)

Tahani: the team leader is trying to find her colleagues' contact information and cubical locations to set up a meeting.

Now, Tahani can find any colleague's contact information in 3 steps instead of 12 steps on 3 different pages.

| 1 | Log on to the home page | 2 | Type a colleague's name | 3 | Find their contact information |

An employee's contact information was aggregated on 1 page

After 13 usability tests we identified 4 major challenges in the prototype design, information architecture, and functionality.

"The search bar is great, but nothing tells you that you can search for a colleague's information." - employee feedback

Unclear visual hierarchy

The addition of unexpected low impact features confused users

The search bar was not intuitive and most users still browsed to find what they needed

We missed looking at the Facebook group employees had been using as a workaround for the Wiki
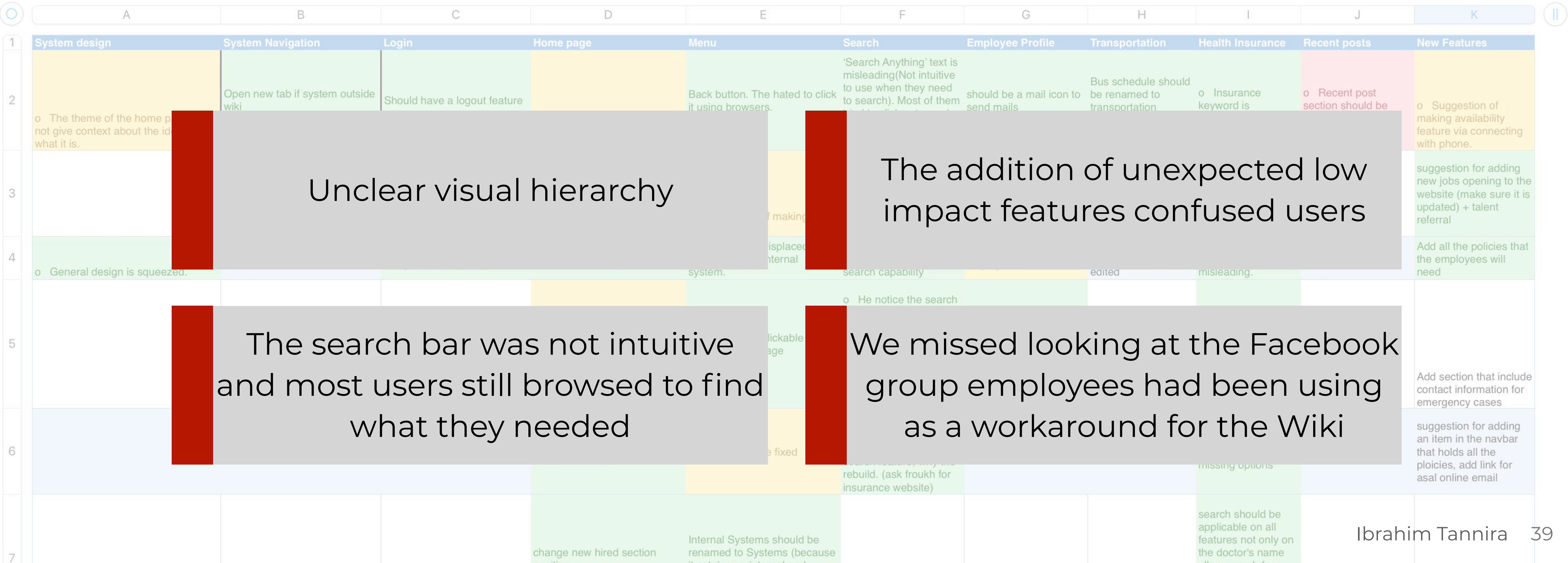
After analyzing the usability test results, we identified 4 key pain points to address in the next design iteration.

When viewing the page for the first time, none of the users noticed the search bar

None of the users thought they could use the search bar to find a colleague's information, and instead opted to browse for it

The "Find Doctor" shortcut was the first thing users saw—another reason why the search bar was not noticeable

Users did not think company news or a knowledge portal were important features

Two main reasons why our prototype failed its first run:

Reason 1 **Scope creep**

Our initial prototype had features from all 4 quadrants of the prioritization chart, leading employees to be confused with new features that they were not expecting. So in the next iteration, we had to make sure we constrained our design to what we knew was going to be most impactful.

Reason 2 **New research information**

Our research had overlooked employees' use of a private Facebook group as a workaround for the old Wiki. So we had to go back and understand how the Facebook group met employees' needs.

The MVP design drew inspiration from the Facebook group employees had set up as a workaround to compensate for the original Wiki's failures.

The most used features of the wiki grouped together in a clearer way

Department-specific information grouped by department instead of being all mixed up

A more visible search bar following Facebook design with a more relevant placeholder text

The MVP design incorporated a Facebook-style navigation bar to further highlight the search functionality.

1   Log on to the home page
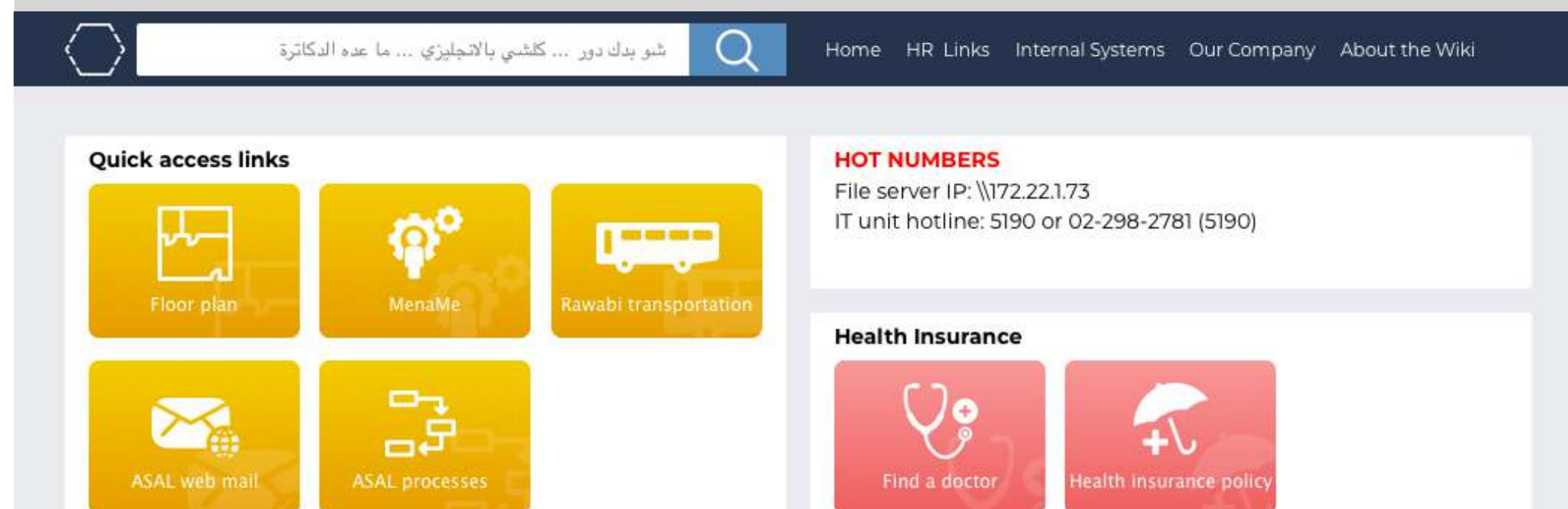
2   Type in a colleague's name
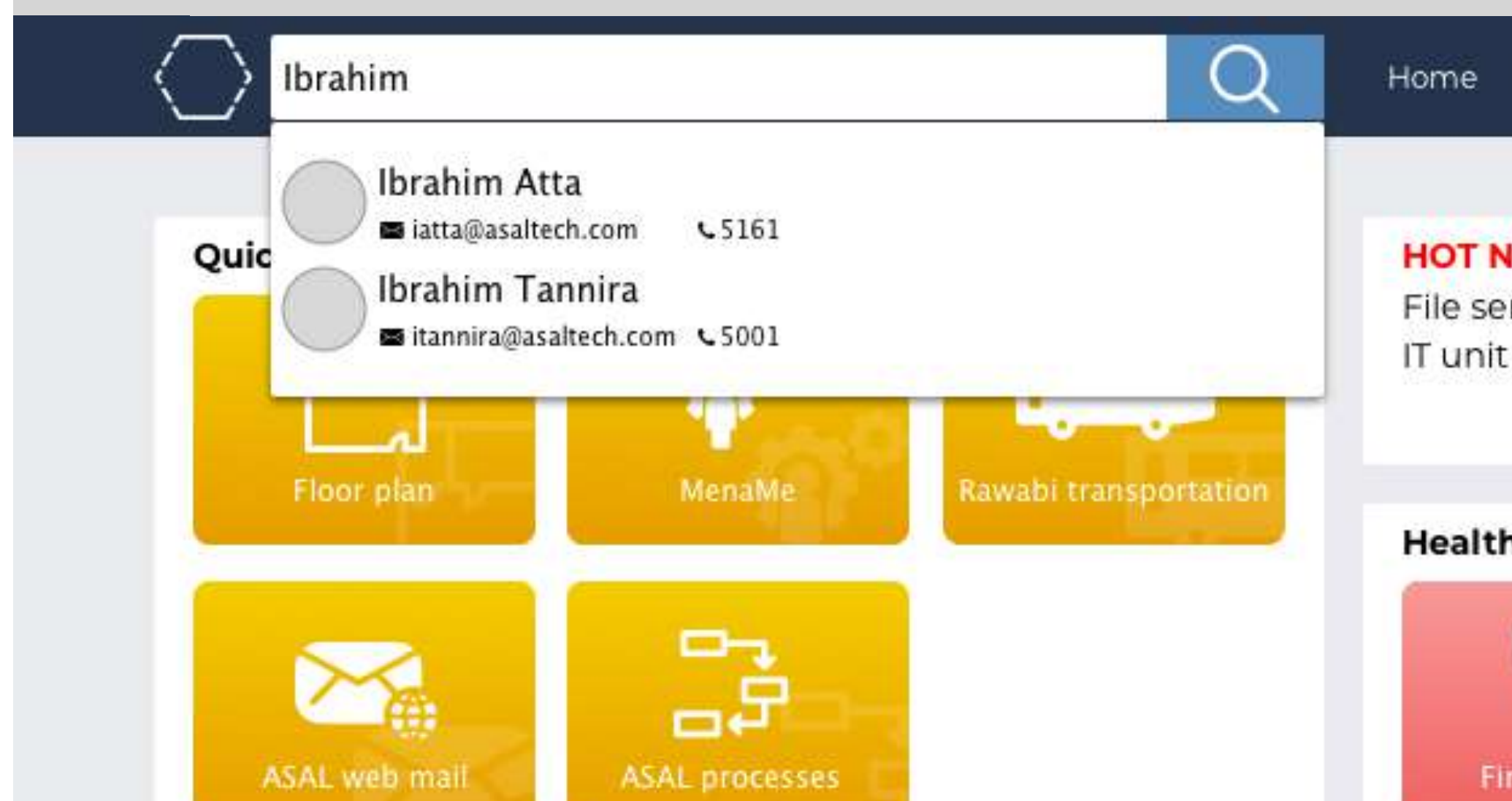
3   Find their contact information and location
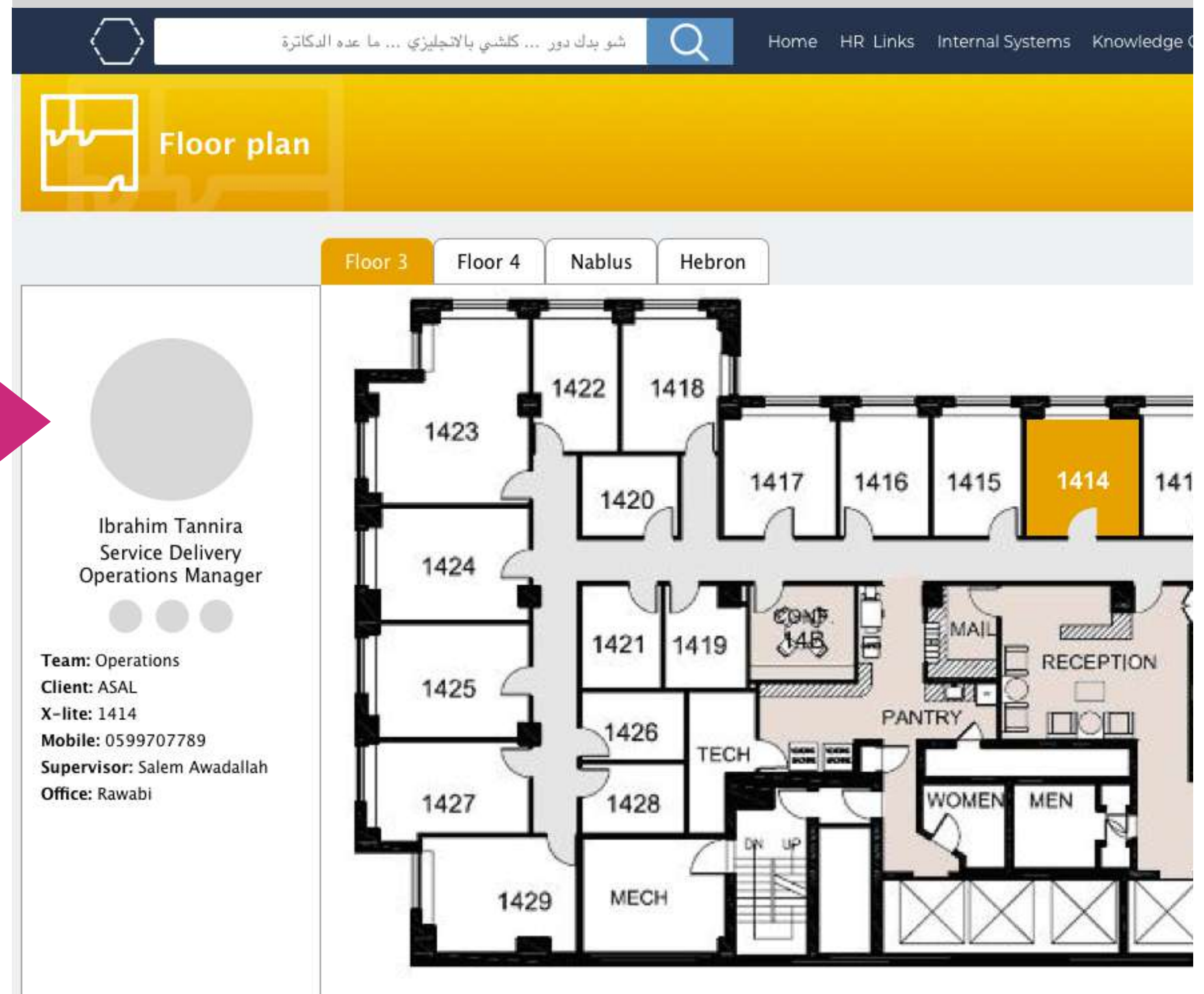
In addition to searching for a doctor's name, the search capabilities were expanded to include searching for providers by medical speciality and/or city.

1 Log on to the home page

2 Navigate to the doctor directory

3 Look up a provider by name, speciality, or location

Lessons Learned

Keep sight of the research findings

When designing and building the new Wiki prototype, we got excited to build a cool new solution and lost track of ensuring that we were addressing the problem with the most expected and impactful features.

Conducting high-fidelity prototype testing before production can uncover critical errors in the design

The first high-fidelity prototype took 2 weeks to code before we could start testing. However, had we used a prototyping tool, we would have saved time and money and gotten the same feedback quicker than we originally did.

What is wrong with the sales process?

A Research Project into the Sales Process

PROJECT SUMMARY

• Research the sales cycle and understand why opportunities take too long to close

• Develop a plan to build an internal product to facilitate and accelerate the sales cycle

Client: ASAL Technologies

Team:

• Product manager (myself)

• UX researcher (myself)

• 4 developers

TIMELINE

6 weeks

MY RESPONSIBILITIES

• UX research

• Product management

Tools

• Affinity diagrams

• Personas

• Customer journeys

• Workflows

THE CLIENT

ASAL Technologies is a software outsourcing company. ASAL helps clients establish remote software engineering teams based in Palestine.

PROBLEM STATEMENT

55% of new deals that took between 3 and 9 months to close were lost.

CLIENT'S GOAL

Increase company revenue and grow its client base.

01. WHAT I DID

In this project, we re-examined the sales cycle and identified challenges in the existing process and tools used in the process

02. THE PROCESS

03. RESEARCH SESSIONS

04. FINDINGS

In this research project, we **planned and conducted 16 in-person interviews** with stakeholders and existing users in Palestine.

24	**4**	**12**	**11**
HOURS OF LOGGED AND TRANSCRIBED INTERVIEWS	STAKEHOLDER INTERVIEWS	USER INTERVIEWS	AS-IS and TO-BE ANALYSES
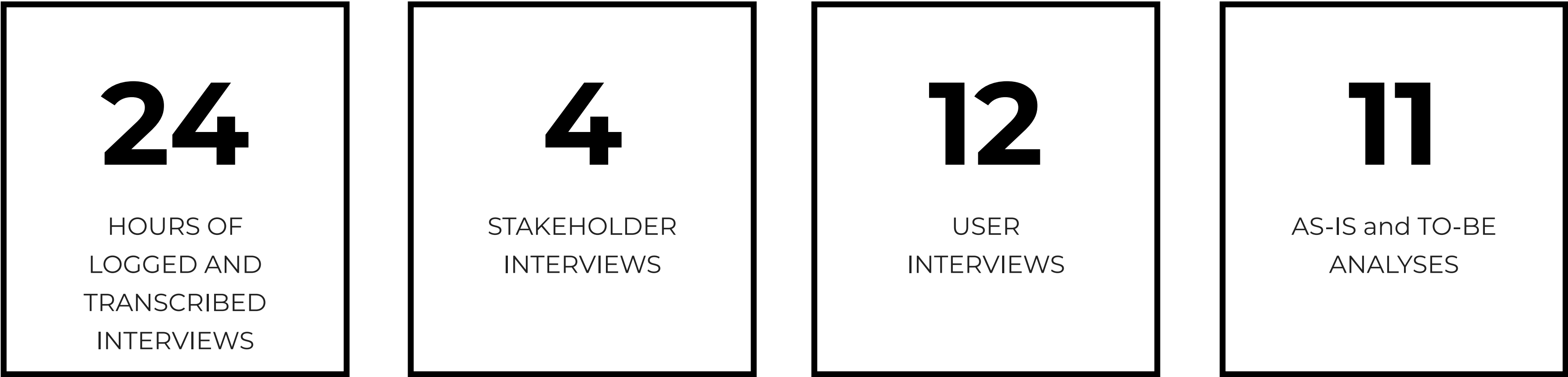
We conducted 3 phases of research over 6 weeks to identify problems and brainstorm solutions.

Collecting and analyzing information			Presenting research findings		Creating product strategy
WEEK 1	**WEEK 2**	**WEEK 3**	**WEEK 4**	**WEEK 5**	**WEEK 6**
Interviewing & Affinity Mapping	Interviewing & Affinity Mapping	Personas & Customer Journey Maps	AS-IS and TO-BE Analysis	Presenting Research & Getting Buy-ins	Ideation & Feature Prioritization

Our first step was to conduct contextual interviews with stakeholders and users. Their perspective was critical to understanding the problems we were trying to solve.

Contextual interviews were going to help us understand how the sales cycle ties into the company's goals and mission.

4 Stakeholder Interviews

Sales Director

Service Delivery Director

Human Capital Director

Financial Director

Stakeholder interview goals

- Understand the company's vision and mission

- Define the expectations from each department involved in the sales cycle

- Identify the key obstacles to signing more clients

- Find out how success is defined and measured

Stakeholders agreed on the vision but each defined it through a different lens.

Service Delivery Director

"Most of the information is in people's heads, and as we grow, that is not going to be good enough to make work flow."

Human Capital Director

"Recruitment is the biggest part of the sales cycle, and right now we have no visibility into the sales cycle."

Sales Director

"The faster we can recruit, the faster we can answer leads, the faster we can respond to an opportunity, the faster we can close a deal."

Financial Director

"The important thing is to pull data from the sales cycle so we can look at continuous improvement."

Our first step was to conduct contextual interviews with stakeholders and users. Their perspective was critical to understanding the problems we were trying to solve.

Understanding alignment and misalignment among boots on the ground was critical to understanding what might succeed or fail.

12 User Interviews

Sales Representative

Project Manager

Recruiter

Accountant

User interview goals

• Understand the sales process in detail

• Understand the relationship of different departments to the sales cycle

• Understand users' challenges and points of conflict throughout the sales cycle

• Understand the tools used for sales

User interviews exposed a gap between stakeholders' and users' expectations. It also exposed a misalignment between teams.

Communication happened through many different mediums, making it hard to keep track of the conversation

Sales Representative

"HubSpot is very limited. I need to be able to involve everyone working in one place instead of multiple email threads."

The lack of clarity and definition of roles and responsibilities led to a chaotic sales cycle

Project Manager

"Handover from Sales isn't clear and does not communicate clear expectations."

Recruitment was an integral part of the sales cycle, yet human resources was not integrated into the sales cycle

Recruiter

"Even though we are not involved in the sales cycle directly, we support Service Delivery in recruiting the right candidates for Sales."

This project had to go Beyond Digital Transformation

We created an affinity map to to help us identify behaviors, pain points, and desired outcomes.

We identified the following areas as focal points based on the research findings.

The existing structure and processes are outdated

The company needed a new organizational structure and new processes before implementing a new tool.

The recruitment process is an essential part of the sales cycle

Closing new deals requires hiring the right people for new clients; however, the recruiting process was a challenge of its own.

The sales process is not documented

The lack of documentation for the sales process creates an atmosphere of confusion. Individuals are not sure when their role starts and ends, and what it entails.

The current tool doesn't serve everyone

HubSpot only helps the sales department; however, there are 3 more departments involved that are cut off from this sales tool.

Sales data is not being utilized

Decisions regarding new clients and the company's future were being made without considering sales data.

The sales and organizational response to new clients is too slow

The lack of an existing defined process, supported by a tool accessible to all, is causing ASAL to lose new opportunities.

While we had 4 user groups, 3 personas summarized their shared goals and pains.

Samia: The Sales Ninja

Sales Representative

Moe: The Money Collector

Accountant

Noah: The Talent Recruiter

Project Manager

Recruiter

The Sales Representatives and Accountants expressed unique goals and pains.

Samia: The Sales Ninja

Samia orchestrates the sales cycle with her colleagues to help ASAL acquire new clients

Goals
- Close as many deals as possible as fast as possible
- Make sure everyone working with her on a deal is synced on roles and responsibilities

Pains
- No one outside of sales has access to the CRM, causing an overhead in communication
- Overhead in communication is causing confusion and misalignment, leading to slow responses to new clients

Moe: The Money Collector

Moe is responsible for tracking new contracts and billing clients

Goals
- Make sure the company is being paid on time
- Stay up-to-date on hiring updates and reflect them on the billing system
- Make sure company transactions are documented on the accounting system

Pains
- Running around each month to collect the relevant billing information from project managers and sales
- Time spent chasing information takes away from time for other important tasks causing him to go home late often

The project manager and recruiter shared the same persona, as they shared similar goals and pains throughout the sales cycle.

Project Manager

Noah: The Talent Recruiter

Recruiter

Noah oversees the fulfillment of new client requests through managing recruitment and handling client expectations

Goals
- Respond to sales inquiries and support the sales cycle
- Recruit candidates for new projects to help close new opportunities

Pains
- Helping sales close new deals is a frustrating experience because Noah never has all of the information necessary to recruit candidates
- Noah's plate is full with his existing clients, and working on new clients with sales takes attention away from his main tasks

The sales cycle is the driving process for the organization's growth, however, the sales cycle **is the least clear and most frustrating process.**

A customer journey map representing the departments' journey and interactions in the sales cycle

Sales Stages	First Contact	Technical Requirements	Proposal	Staging	Closed
Touch Points	- HubSpot CRM	- Email - Walk-in meetings - Phone calls	- Email - Walk-in meetings - Phone calls	- Email - Walk-in meetings - Phone calls	- Email - Walk-in meetings - HubSpot CRM

3 customer journeys represented the in-depth experience of each persona.

	Receive Qualified Lead	Meet the lead	Send the lead to SD	Write the Proposal and get it reviewed by Finance	Get Client Approval on the proposal	Staging (ASAL & Client Recruitment)	Close the Deal
User Needs	Get a Sales Qualified Lead	• Conduct a meeting/call with lead to get a job description • Get enough information about who the lead is • Get NDA signed (if needed)	Receive a Go or No-go with details on next steps	• Fill the proposal templates with the opportunity data • Get finance feedback	• Kick off recruitment with HC • Assign the deal to a PM from SD • Insure PM communication with the client is smooth??	• HC and PM agree on recruitment process and requirements • Conduct ASAL interviews and identify the best candidate to recommend to clients • Arrange and conduct client interviews	• Move the Deal to Closed Won • Be informed about the status, if any help needed
Storyboard	• Adina receives a sales qualified lead • Contacted via email • Received from marketing • Refereed by a network/client	• Adina want to know more about the client • Adina want to answer the SD Lead Qualification questions	• Adina moves the deal to the requirements stage and assigns the deal to the SD Ops • Adina waits for SD to give her the green light to process the lead further	• Adina works with Finance to get a proposal and rates approved after getting the go ahead from SD • Adina sends the proposal to the lead	• Adina negotiates proposal terms with client via email/phone • Adina gets Finance and Sales Directors approval if she needs to give an additional discount	• Adina informs SD of the clients approval and requests a PM be assigned to the project. • SD assigns a PM to the project and begins the recruitment process in collaboration with HC (more on recruitment in the recruitment project)	• Once the client approved candidates are hired the deal is closed with a contract signing • A handover email is sent from Sales to SD and Finance announcing the end of the sales cycle
Process & Channels	• Marketing Team • Network/Clients • Social Media (Linkedin)	• Lead	• SD	• Finance • Murad	• SD • PM	• HC • PM • SW Engineering Interviewer	• SD • PM
Touch Points	• LinkedIn • Email	• Email • Video conference • Phone	• Email • Phone • CRM (through tagging SD Ops) • Go/No-go Meeting	• Email • Phone • F2F meeting	• Email • Phone	• Email • Phone • ATS	Email
Experience	Excited	Confidant	Frustrated	Excited	Frustrating	Frustrating	Happy
Problems	• Information about the lead is not enough • Qualification questions about a lead are not built in the CRM • First Contact Stage does not differentiate between leads status	Technical information collected is not always sufficient for SD	• SD take time to respond to Jojo • SD may require more Information	• Manually fill out the lead data into the proposal • There is no standard template to fill into	• Client and PM's communication has some delays	• Client and PM's communication has some delays	Start typing…
Ideas	• Syncing Leads from LinkedIn Via Integration • Create a sales pipleline independent of the sales pipeline with SD	• Require the qualification questions to be answered before moving forward • Attach NDA as an attachment on the account object • Create a checkbox signed on the Opp record	• Automatically notify the SD, and keep reminding them • Certain fields are required before moving the deals to SD • Time box time spent in the 2nd stage	• Generate the proposal automatically • Auto-populate the deal information • Use service Object to price the product • Use Quotes object for service discounts • Notify finance to review proposal • Notify operations when proposal is reviewed	• PM would open up a case to Jojo to notify a client is not responding • Jojo would notify a SD to get the PM responding faster to the client • Time box recruitment into 4 weeks and 6 weeks period	• PM would open up a case to Jojo to notify a client is not responding • Jojo would notify a SD to get the PM responding faster to the client • Time box recruitment into 4 weeks and 6 weeks period	• Notify SD and PM that the Deal is Closed Change Opportunity Stage to closed won

Our research proposed 4 items covering organization restructure, redefining the sales process, a prioritized feature list, and a product road map for developing a CRM on Salesforce.

The research findings were aimed at creating clarity and alignment within the organization and creating a process that could be supported through a CRM.

Challenges	Solutions
• The sales processes were not documented	• 11 swim lane flowcharts documenting the sales processes and subprocesses
• The first three stages took 3 weeks to complete	• Use RACI—a responsibility matrix—to remove responsibility ambiguity
• The CRM was only accessible to the sales department	• The first three stages were reduced to a 1 week period
• No clear roles and responsibilities	• Everyone contributing to the sales cycle was brought into the CRM

Our research proposed 4 items covering organization restructure, redefining the sales process, a prioritized feature list, and a product road map for developing a CRM on Salesforce.

An appropriate organizational structure and a clearly defined sales process were necessary before implementing a new CRM.
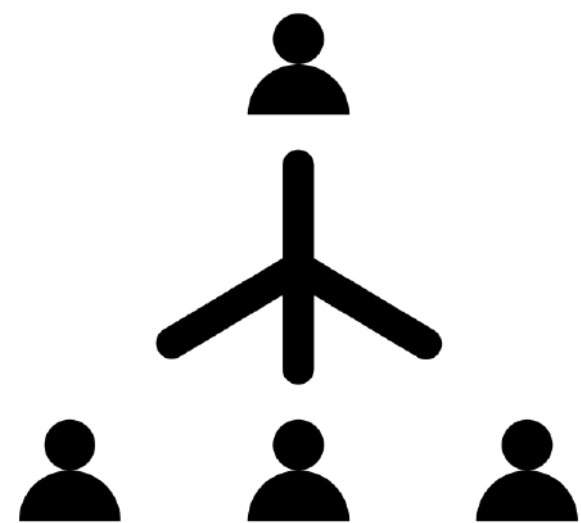
Created by AdbA Icons ❤
from Noun Project

Created by monkik
from Noun Project

Organizational Restructure

Create a technical sales role functioning as a liaison between sales and service delivery during the initial phases of the sales cycle

Identify incentives for project managers to take on new projects

Create an account management role for project managers who are looking for new opportunities and career growth
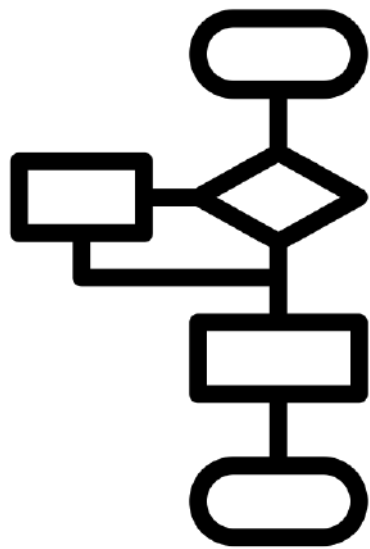
Redefining Processes

Document the new sales process and its subprocesses

Use a responsibility matrix to clearly define roles and responsibilities in the sales cycle

Our research proposed 4 items covering organization restructure, redefining the sales process, a prioritized feature list, and a product road map for developing a CRM on Salesforce.

After getting stakeholders' buy-in on the new structure and processes, we started working on a feature list and product road map for a minimal usable product using Salesforce.
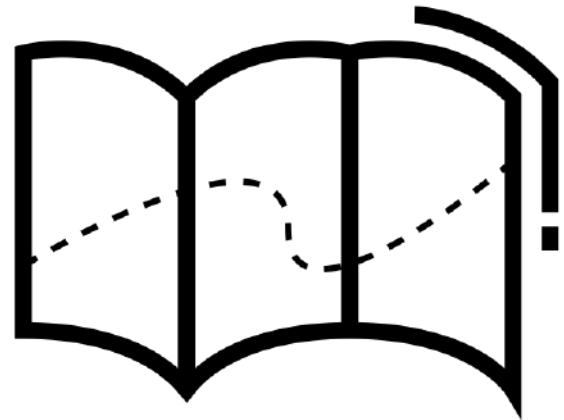
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Created by Phil Goodwin
from Noun Project

Prioritized Feature List

We identified the following modules as the most important to build into the CRM in order to address the existing challenges:

1- Lead Management

2- Opportunity Management

3- Proposal and Contract Management

4- Analytics Dashboard

Salesforce CRM Product Road Map

Based on the developers' estimations, I created a 4-month road map that covers the prioritized modules and correlated them to customer value gains.

Why is recruitment taking too long?

A Research Project into the Recruitment Process

PROJECT SUMMARY

• Understand the recruitment process from the perspectives of both recruiters and job applicants

• Evaluate the existing Applicant Tracking System (ATS) and the potential of building a new in-house ATS using Salesforce.

Client: ASAL Technologies

Team:

• Product manager (myself)

• UX researcher (myself)

• 4 developers

TIMELINE

10 weeks

MY RESPONSIBILITIES

• UX research

• Product management

Tools

• Affinity diagrams

• Personas

• Customer journeys

• Workflows

THE CLIENT

ASAL Technologies is a software outsourcing company. ASAL helps clients establish remote software engineering teams based in Palestine.

PROBLEM STATEMENT

Recruitment efforts take longer than 6 weeks, negatively affecting the sales cycle.

CLIENT'S GOAL

Streamline the recruitment process to help accelerate the sales cycle.

01. WHAT I DID

In this project, we reexamine the recruitment process and its relationship to the sales cycle. We identify challenges in the existing recruitment process and the software tools used.

In this research project, **we planned and conducted 40 in-person interviews** with stakeholders, recruiters, and job applicants in Palestine

28	**3**	**21**	**16**
HOURS OF LOGGED AND TRANSCRIBED INTERVIEWS	STAKEHOLDER INTERVIEWS	RECRUITERS & INTERVIEWERS	NEW HIRES & JOB APPLICANTS
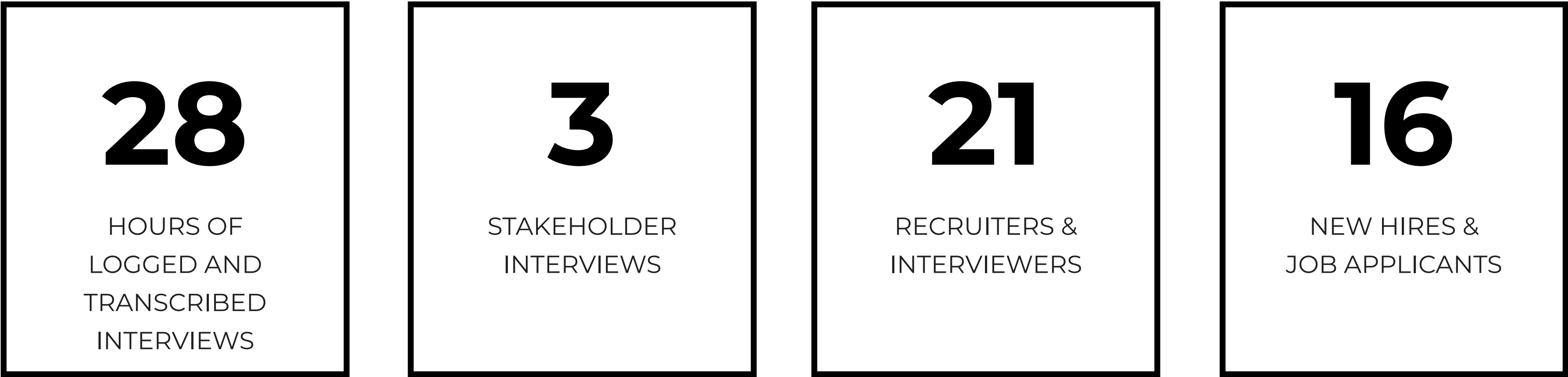
We conducted 3 phases of research over 10 weeks to identify problems and brainstorm solutions.

User research and usability testing				Research analysis and product strategy		Feature prioritization
WEEK 1	**WEEK 2**	**WEEK 3**	**WEEK 4**	**WEEK 5**	**WEEK 6**	**Weeks 7 - 10**
Interviewing & Affinity Mapping	Interviewing & Affinity Mapping	Personas & Customer Journey Maps	Usability Testing	AS-IS and TO-BE Analyses	Competitor Analysis	Prototyping and Usability Testing

Our first step was to conduct contextual interviews with stakeholder and users. Their perspective was critical to understanding the problems we were trying to solve.

To understand the recruitment process, we interviewed stakeholders and users to better grasp their goals and challenges.

3 Stakeholder Interviews

Human Capital Director

Service Delivery Director

Financial Director

Stakeholder interview goals

• Understand the goals of the recruitment process and how it plays into the sales cycle

• Understand clients' expectations of the recruitment process

• Identify success metrics

While recruitment was a critical activity to the growth of the company, everyone had a different opinion on how it should be done.

Service Delivery Director

"Recruitment takes a minimum of 4 - 6 weeks. Most clients won't wait that long to find out if we have what they're asking for."

Human Capital Director

"I wish the ATS would keep track of how long recruitment takes, so we can estimate recruitment time when recruiting for new positions."

Financial Director

"I wish I knew what was coming down the pipeline so we could be better prepared for hiring requests."

Human Capital Director

"Ideally, we should have a pool of resources that we can choose from, so if someone has an opportunity, they should be able to open a screen somewhere and find a list of resources that are already filtered."

We utilized multiple research methods to identify relevant users and conduct research.

HIRING STAFF

Recruiter

2 INTERVIEWS

Hiring Manager

7 INTERVIEWS

Interviewer

22 SURVEYS

12 INTERVIEWS

JOB SEEKERS

New Hire

10 SURVEYS

7 INTERVIEWS

Job Applicant

60 SURVEYS

9 USABILITY TESTS

9 INTERVIEWS

Goals for user research activities

- Understand the recruitment process from the perspective of recruiters, hiring managers, and interviewers (internal users)
- Evaluate the existing Applicant Tracking System (ATS)

Goals for user research activities

- Identify applicant expectations of the recruitment process
- Understand the experience of recent hires when applying to ASAL
- Identify problems in the existing career portal

Each team at ASAL had their own recruitment process, and this created various challenges.

Hiring Manager

"Sometimes applicants apply and don't attach a resume because the application portal doesn't allow them to."

Recruiter

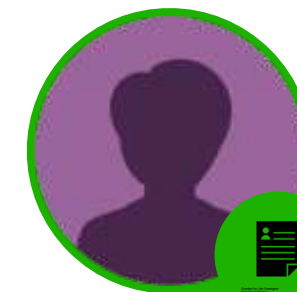"My main tool for recruiting is LinkedIn, I hate using the ATS."

Interviewer

"All communication with the recruiter is via email, which involves too much back and forth to arrange basic logistics."

42.9% job applicants faced multiple challenges when applying to ASAL.

Job Applicant

"I did not know where to apply when I opened the ASAL career page."

New Hire

"Having to creating an account and then log in to apply is not user friendly."

A ONE-FOR-ALL RECRUITMENT PROCESS WAS NOT THE SOLUTION

We created an affinity map to to help us identify behaviors, pain points, and desired outcomes.

We identified the following areas as focal points based on the research findings.

Each project had a unique recruitment process based on clients' requests

The most time consuming activity was recruitment logistics

Trying to find time slots for interviews was done manually with an extreme amount of back and forth between all parties.

Most people worked outside of the applicant tracking system

For different reasons, human resources and hiring managers preferred to work outside of the system to speed up the process.

The recruitment process was not well-documented

The lack of documentation created an atmosphere of confusion and unclear expectations

Applicants had such a frustrating experience with the job portal that some would opt not to apply

The recruitment process serves two user groups: the company users and the job applicants.

ASAL Users

Salem: The Recruiter

Tamara: The Hiring Manager

Sally: The Interviewer

Applicant Users

Elias: The Job Seeker

3 personas were involved in each recruitment effort.

Salem: The Recruiter

Tamara: The Hiring Manager

Sally: The Interviewer

Salem organizes the recruitment process logistics from start to finish

Goals
- Serve the hiring manager incoming recruitment requests
- Build and maintain a database of qualified candidates

Pains
- Every team has their own recruitment style, and the current ATS doesn't allow for that flexibility
- Using emails to follow up with 15 teams can be overwhelming, causing things to fall between the cracks

Tamara evaluates applicants until they've fulfilled client requests

Goals
- Hire the most suitable software engineers in the fastest time possible
- Respond to sales and client inquiries about new opportunities

Pains
- Juggling multiple projects while serving new clients can be challenging without a good process and tool in place
- Recruitment is time-consuming and unpredictable, causing frustrations for both hiring managers and clients

Sally conducts technical interviews and evaluates applicants' technical skills

Goals
- Evaluate candidates' technical knowledge and provide her assessment of the candidates to the hiring manager and the recruiter

Pains
- Not having a tool to facilitate interview logistics causes a lot of frustration

The job application experience was so frustrating that some people would give up on applying.

Elias: The Job Seeker

The Job Seeker is an entry level engineer looking for their first job

Goals
- Find their first job at a dream company, in a role that meets their expectations

Pains
- The job portal is not user friendly and has many bugs preventing applicants from completing the application process
- Applicants who do not move forward in the recruitment process do not get a response back from ASAL about their status

	Get Job Description	Create/Publish Job Order	Sourcing Resources	CV Filtering	HR Screening	Interview Logistics	Asal Interview	Engineers Feedback	Feedback for Candidates	Finance Interview
User Needs	• Clear Job description and requirement from Sales, Ops, or PM	• Templates for the job requests without a job description • Post on multiple platforms with one click	• Get candidates from different resources (CATs, referrals, ASAL career page) suitable for the positions • Searching available	• Filtering CV based on criteria relevant to the job order • Sharing a list of qualified candidates	• Collect additional information important to the CV filtering and candidate qualification process • Gauge candidate	• Set up Interviews with the chosen candidates in a time slot that fits both candidates and interviews		• Receive feedback from the interviewer (PM/Engineer)	• Inform the candidate with their status at each stage	• Give a conditional offer.
Process & Channels	• Sales, Ops, and/or PM get the job description and requirements from the client • Ops and/or PM send the job description to the recruitment officer to post it on internal and external job boards	• Reformat the job order and it's requirement. • create job order and publish it on ASAL career page or keep it internal in some cases • Post the job order on multiple platform (LinkedIn, Facebook, jobs.ps)	• Receive applications through CATs (Candidates who applied on ASAL career page) • Search available resources on ATS using keywords related to the job • Headhunting using LinkedIn. • Receiving candidates through referrals via	• Mariam meets the job owners to set criteria for CV filtering • Mariam looks at: (Location, years of experience, technologies, graduation Date, soft skills, technical skills, previous employers) • Mariam uses a rating system to score applicants	• Mariam calls candidates to: • Check their interest in the job • Get financial expectation • Get location preferences and flexibility • Mariam asks candidates to fill missing information in profile	• Mariam sends an email to the PM asking about the engineer(s) that will conduct the interview • Mariam checks interviewer's time slots • Mariam check candidates's time slots • Mariam sends interview details: • Time, location	Start typing...	• PM sends to HR: • Regret list. • Follow up list. • Hiring list. • Mariam ask the interviewer for feedback (PM/Engineer) • Mariam fill feedback on CATS • Focus on getting specific information like:	• Send regret emails for candidates in the regret list • Schedule a meeting for the candidates in hiring list with the finance • Check candidates -in the followup list- interest in other positions	• Give a conditional offer • Do Background check • If proposal rejected send regret email
Touch Points	• Email • Colleagues • Phone	• Project Managers • CATs internal post/ASAL Careers • Social Media (Facebook) • Job portals (jobs.ps)	• SD director/Ops manager for internal resources without a project • Emails for referred candidates via employees	• Email • Phone	• Phone • Email • Candidates	• Email • Phone		• level of skills.	• Email • Phone	• Email • Phone
Problems	• Getting a request to create a job order without a job description • Getting an unclear job description from client/Ops/PMs	• Manually editing it job orders on word and copy/pasting it manually into different platforms is time consuming • There is no agreed on structure for how a job post should be • There is no standard template for job	• Manually entering headhunting information • Unawareness of available internal resources • CATs limited search functionality • No visible indicator of which pipeline(s) the candidate is	• No agreed upon declared standard for evaluating candidates expertise • No search flexibility in ATS • Manually adding candidates to ATS from LinkedIn or referral • Copy and paste links from ATS to email is	• Candidate don't respond sometime to mobile or email	• Need to send reminders for engineers to get their time slots. • 4 side arrangements need to be done: • Engineers • Candidates • Admins • Reception • Sharing interview details with candidates over phone and email is difficult		• Engineers are slow in providing feedback. • Engineers feedback is not comprehensive.	• Candidates may be forgotten to be informed because there is no reminder system.	• Background checks takes time.
Ideas	• Create titled sections for a job order • ASAL introduction • Client introductions • Responsibilities • Qualification/Requirements • Guide, validate, and	• Enable integration with social media and professional networks to post on all websites instantly • Automatic content format generator • Guide, validate, and enforce job	• Enable automatic contact import from professional networks • Make internal resources visible during the resource collection process • Support an advanced search engine	• Empower a set of agreed on standards for evaluating candidates • **Visibility for the position list of candidates.**	• Send automatic reminders for specific period for time	• Arrange the meeting with the candidate via visual workflow(multiple screens with questions regarding times and	Start typing...	• Automatic reminders for engineers and PMs to document their feedback • Specify set of questions that extracts the most beneficial feedback	• Automatic reminders for positions owners. • Automatic reply for candidates at each stage completion.	
Wishes	Start typing... • Guide, validate, and	• Drag user profile form LinkedIn and account	• Enhanced search like LinkedIn search	• Notification system that helps reminded	• ATS that give suggestions for	Start typing...		• ATS that give a form with species questions	• Templates to communicate with	

Our competitor research allowed us to compare our in-house solution to other products, and helped us understand how existing products solved problems.

Prioritized Modules	Bullhorn Connexys	Comeet	Lever	Building from scratch using Salesforce
Customizable recruitment process per job post	✗	✓	✗	✗
Out-of-the-box customizable career portal	✓	✓	✓	✗
Interview logistics management	✗	✓	✓	✓
Flag applicants when applying to multiple jobs	✗	✓	✗	✓
Out-of-the-box Salesforce integration	✓	✗	✗	✓
Budget	$$$$	$	$$$	$$$

While our research identified key challenges in the recruitment cycle and proposed ideas on how to fix them, we still had to decide whether to build an improved system internally or invest in an existing solution.

Was it worth building an ATS on top of a CRM to keep everything confined to a single system?

Building an ATS in-house	Investing in an existing ATS solution
Building an ATS from scratch would exceed the timeline and budget of the original project that centered around the sales cycle	Ready to go solutions that cover 98% of our needs
We would be starting from scratch without any expertise in building ATS	Less expensive than building from scratch and can be deployed immediately
We would have to build a new job portal from scratch	We can start onboarding users on the ATS while we build and customize our sales CRM

While we set out to identify what we needed from an in-house ATS, our research concluded that building an in-house ATS would take our time, resources, and attention away from the main goal of accelerating the sales process.

Redefining and documenting the recruitment process, while investing in an off-the-shelf ATS solution, will sufficiently streamline the recruitment process to ultimately help accelerate the sales cycle.
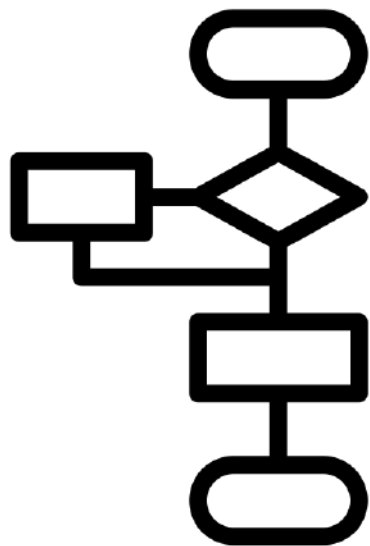

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from Noun Project

Created by monkik
from Noun Project

Applicant Tracking System

Invest in an off-the-shelf ATS solution that can be deployed immediately

Find an ATS that has an out-of-the-box career page that can replace the existing career page

Redefining Processes

Document the new recruitment process and its subprocesses

Use a responsibility matrix to define roles and responsibilities in the recruitment process

INDUSTRY ACITIVITES

INDUSTRY ACTIVITIES

World IA Day Boston - 2020

I was a co-organizer for WIAD 2020, which took place at Lesley University. I helped to recruit and identify speakers, promote the event on social media, and plan event logistics.

UXCamp NYC - 2019

I gave a talk about UX and product management fails. The talk shared some mistakes and lessons I had learned from building two products and working with two development teams.

CONTACT DETAILS

GET IN TOUCH

I'd love to show you more of my work and answer any questions you may have.

Here are the best ways to reach me:

SEND ME AN EMAIL

itannira@gmail.com

GIVE ME A CALL

401-499-4128