



Building better experiences

A few techniques I've learned over the past 4 years to generate signals for product teams, create meaningful value for users, and reduce extraneous effort spent on overzealous customizations to meet disparate demands at scale.

Concept flows are the new MVP

We're visual beings by nature and what we see inspires an emotional response. Most users don't know the difference between mocks, prototypes and real software. While some may call it vaporware, I call it not wasting time building the wrong thing.

The golden UX ticket is the perception of ease

ADP spent \$2M studying users to find out the secret to user happiness. Modern product teams are oriented around features. What if we organized around making difficult workflows feel effortless? From the user's perspective, features are things they have to learn how to use - and that takes effort & time.

So what's the catch?

Every shop is different

Leverage prototypes to inform workflow-driven rules
engines that allow the platform to adapt.

What's a rules engine look like to the user?

By combining a conversational UI with an intelligent onboarding engine, we can ask users how they work and allow the system to configure itself to create ease.

Step 1

Tell us about your workday

What's the first thing you'd like to see every morning?

Step 2

Tell us about your work style

How often would you like updates sent to your phone about important account changes?

Guardrails & Help

This one's important.

Begin

What type of information do you want to share with your clients?

We're happy to select specific highlights based on certain dollar or percentage changes.

Best update practices

Altruist currently recommends communicating with your clients at least once every 10 days, even without major portfolio changes.

Help

Need more info?



Let's get started configuring your reporting.
Please select a profile:

Fast & Easy

We'll ask a few questions and provide you with the core basics to get a general overview of major trends and key events.

Tailored (recommended)

The best 30 minutes you'll spend on your business this month. Help us learn what's important and how to help you grow.

Really Advanced

Do your friends ask you to fix their websites? If you're not afraid of a little Javascript, we can give you access to some additional tools.

Behind

Select Existing Audience

45,232

Water Heater Estimates 


45,232

Expand All Collapse All

Clear All


 Invoice

 Membership


 Equipment

 Estimate


Status

Open 

Date Range

 01/15/2018

→

 02/19/2018

Price

greater

less

\$ 0

Zipcode

Type here or select from list 

Tags

Type here or select from list 

Business Unit

Type here or select from list 

 Appointment

 Location

In terms of a UI, the art is in the setup.

By understanding all of the drivers needed to configure a system of threshold-based actions, we can create a clean flow that helps the user adapt the system to their business.

Modern SaaS platforms often ask the user to do the opposite, or attempt to achieve a similar affect via a series of manual admin controls... at great cost to future gross margins.

Some solid UI patterns help, too.

Overview

Lead Generation

Productivity

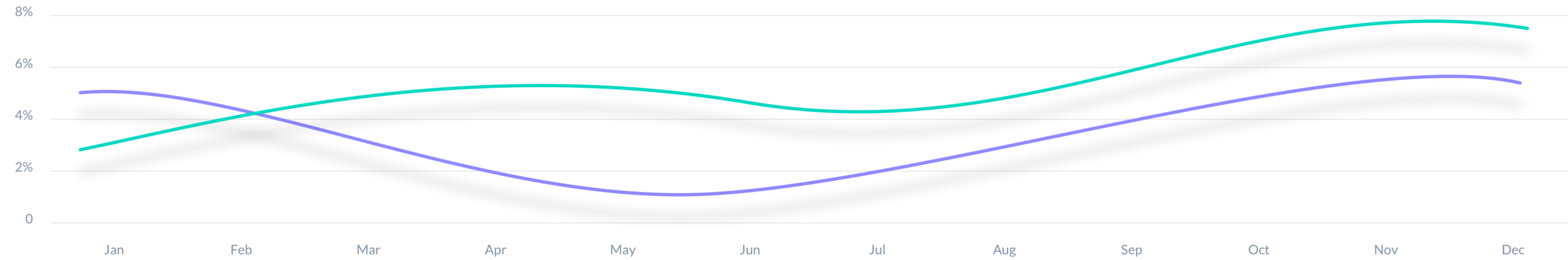
Sales



SHOW FILTERS

Overview ⋮

● 1ST LOOK ● 2ND LOOK



Lead Generation ⋮

TECHNICIAN	NUMBER OF FINANCED JOBS	NUMBER OF TOTAL JOBS	PERCENT OF FINANCED JOBS	FINANCING AVG TICKET	TOTAL AVG TICKET	FINANCING AVG TICKET > \$5K	TOTAL AVG TICKET > \$5K
William Thompson	2	45	8%	\$6,402	\$1,594	\$14,943	\$5,192
David Buckner	2	30	2%	\$4,827	\$4,983	\$9,538	\$8,393
Sam Howell	1	25	3%	\$5,032	\$2,931	\$9,842	\$6,435

Inventory

Procure & Receive

Replenishment

Purchase Orders

Receipts

Vendors

Manage

Adjustments

Transfers

Locations

Trucks

Warehouses

Find a vendor by name or contact

5 ACTIVE VENDORS

Ferguson

Anna Walsh
thernandez@skinder.info

Home Depot

Dorothy Sanchez
creyes@tagchat.com

Lennox

Bill Stevenson
newpo@lennox.com

Maykke

Nicole Miller
wfernandez@topiczoom.mil

Inactive

Premier Copper Products

James Hudson
pmcdonald@oyoloo.gov

Schon

Donald Holland
jmcdonald@gabcube.gov

Inactive

Vinnova

Stephen Armstrong
mcarter@dazzlesphere.org

Vendor profile

Close

EDIT

DETAILS

VENDOR NAME	ADDRESS
Lennox	34234 South Industrial Avenue New Town, CO 93821

CONTACT

FIRST	LAST	PHONE	EMAIL	FAX
Bill	Stevenson	(647) 832-2812	newpo@lennox.com	n/a

TAGS

HVAC

NEW

MEMO

Use Lennox for all new HVAC installs. Check the pricebook once a quarter to make sure we're up to date.

DEFAULT PO DELIVERY METHOD

Electronic Delivery

KEY

LXDSASD-F9238-12132-AOIO-61-LXDSASD-F9238-12132-AOIO-61

Perhaps the magic comes
when software enables
good decision-making,
in real time.

Call Health

Amanda Adams



3:42 min
DURATION

0
FLAGS

High
CONFIDENCE

MONITOR CALL

Real-time Semantics

My **air-conditioning system** is **old** and stopped working on Sunday.



My wife wants one of those fancy **Nest thermostats**. Maybe it's time to **replace** it.



Job value Prediction

\$8,700 ↑

ANALYSIS TREND



Call Health

Mark Richards



5:38 min
DURATION

2
FLAGS

Low
CONFIDENCE

MONITOR CALL

Real-time Semantics

I **can't afford** to pay another giant service bill. Can you guys just come and do a **quick fix**?



I called you guys because the ad said it was a good deal. **This fee is too high.**



Job value prediction

\$300 ↓

ANALYSIS TREND





Thank you for taking a look

I believe we're entering a new era for SaaS - a time when we can create meaningful tools that help people do their jobs more gracefully.

Rob Simon

robsimonla@gmail.com