

September, 2024

Hello I'm Dafne

Case study - Business Happen GmbH

UX/UI designer and CRO specialist





About the company

Agency - Startup

3 years-old

Salesforce Administration

Salesforce Collaborative design

Some of its customers:





My Role

Product designer

Since october last year

Double diamond

My Responsibilities

User Research and Analysis

Design Strategy and Planning

CRM Performance Optimization Analysis

UI/UX Design (SaaS, Website, Apps, Portals)

Interactive Prototypes and Mockups (App, website, CRM, Platform, etc..)

Case study 2

About the company

Business Happen creates tailored Salesforce solutions to streamline your sales, support, and customer experience. From custom integrations to user-friendly designs, our agency optimizes every step to help your business grow effortlessly.

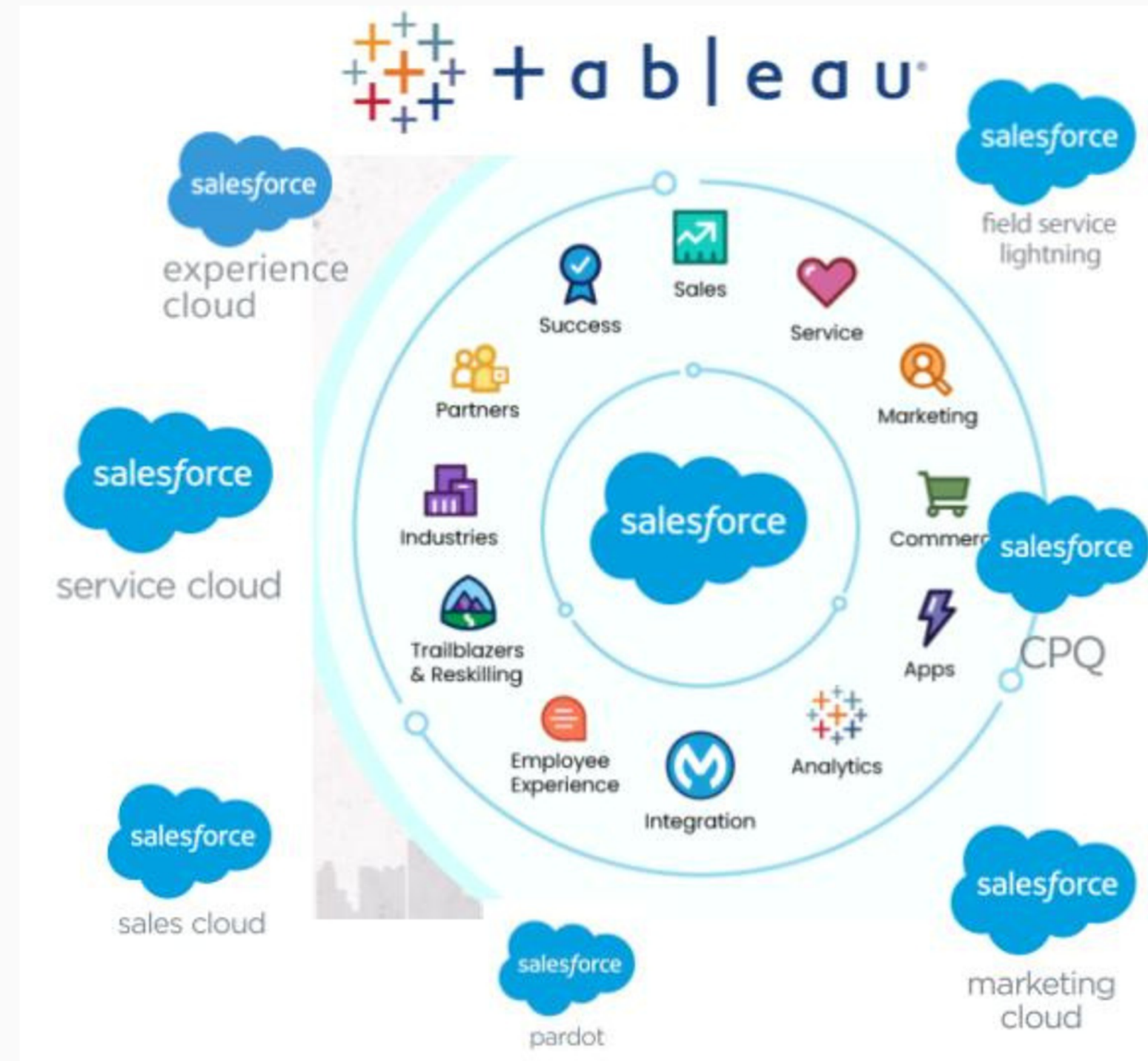
Services

- Custom Salesforce Development and Integrations
- Customer Service and Case Management Optimization
- Salesforce CRM Performance Optimization and Analytics
- Advanced Prototyping and UX/UI Visualization for SaaS and Integrations

What is Salesforce?

Salesforce is a cloud-based customer relationship management (CRM) platform that helps businesses manage customer interactions, sales, marketing, and service operations

- CRM (Customer Relationship Management)
- Websites and digital experiences (Portals, support centers, Landing pages etc).
- Mobile Applications
- Integrations and API-Based Assets



What the agency wanted from me

They wanted me to visualize the solutions they propose to their customers. The agency sought a UX designer to create Salesforce App prototypes before involving developers, aiming to streamline and accelerate their development process.



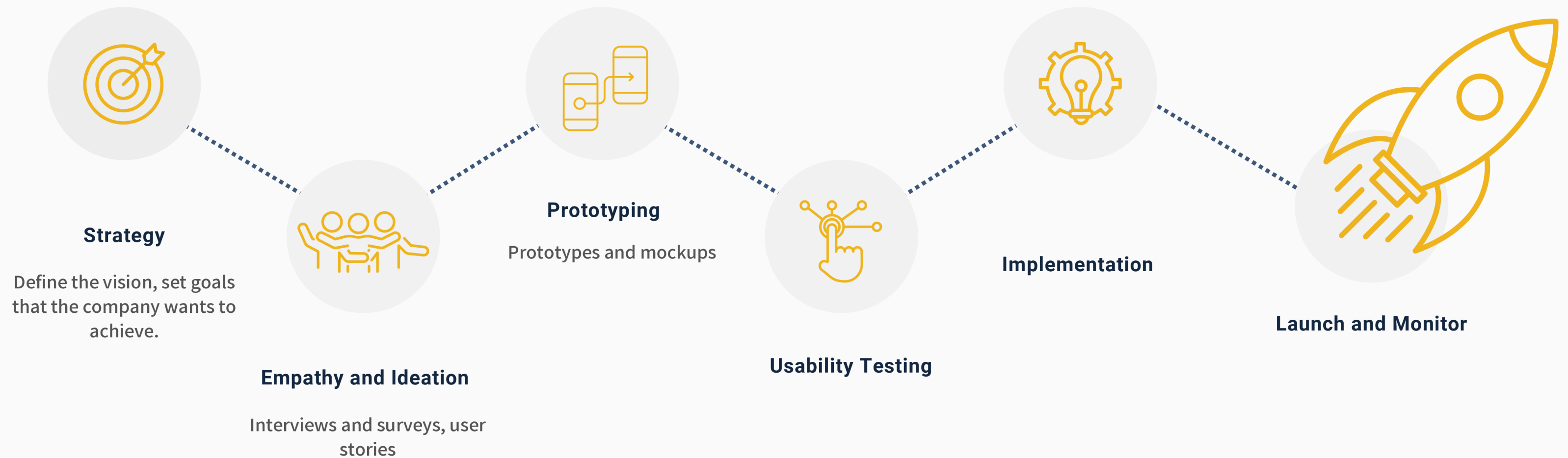
Hey, why just a UX/UI designer?

- 1** Let's challenge your services—**how can I help improve them and streamline your processes?**
- 2** **What about Performance Optimization?**
Optimizing customer support processes, increasing conversion rates in sales deals, and improving performance in marketing campaigns, among others.
- 3** I can design Salesforce components, websites, apps, templates, and screen flows
- 4** Let's **act as facilitators**, bridging communication and collaboration between stakeholders and users through user research and prototype creation.

Case study 2

Process

What process did I follow to move from problems to solutions?



Case study 2

Holistic Research

Captures the comprehensive approach of studying the entire ecosystem, including different roles like **users, admins, developers, and stakeholders**.



Surveys



Interviews



Community

Goals of this research

- Frustrations from our Customer
- What kind of pain points do our users and stakeholders face?
- Ideal solutions customers perspective
- If our solutions align with our customers.
- Best practices and recommendations based in experience
- Setting focus points with prioritization

Holistic Experience Research

Findings (Users, stakeholders, and dev.)

1




Inefficient
Business
Processes

2

High risk of
“building the
wrong thing”
(ex. App
development)

3



Low
Conversion
Rates


4

Salesforce
capabilities &
complexity
increased a lot in the
last 10 years

5

Low user
adoption of
new features

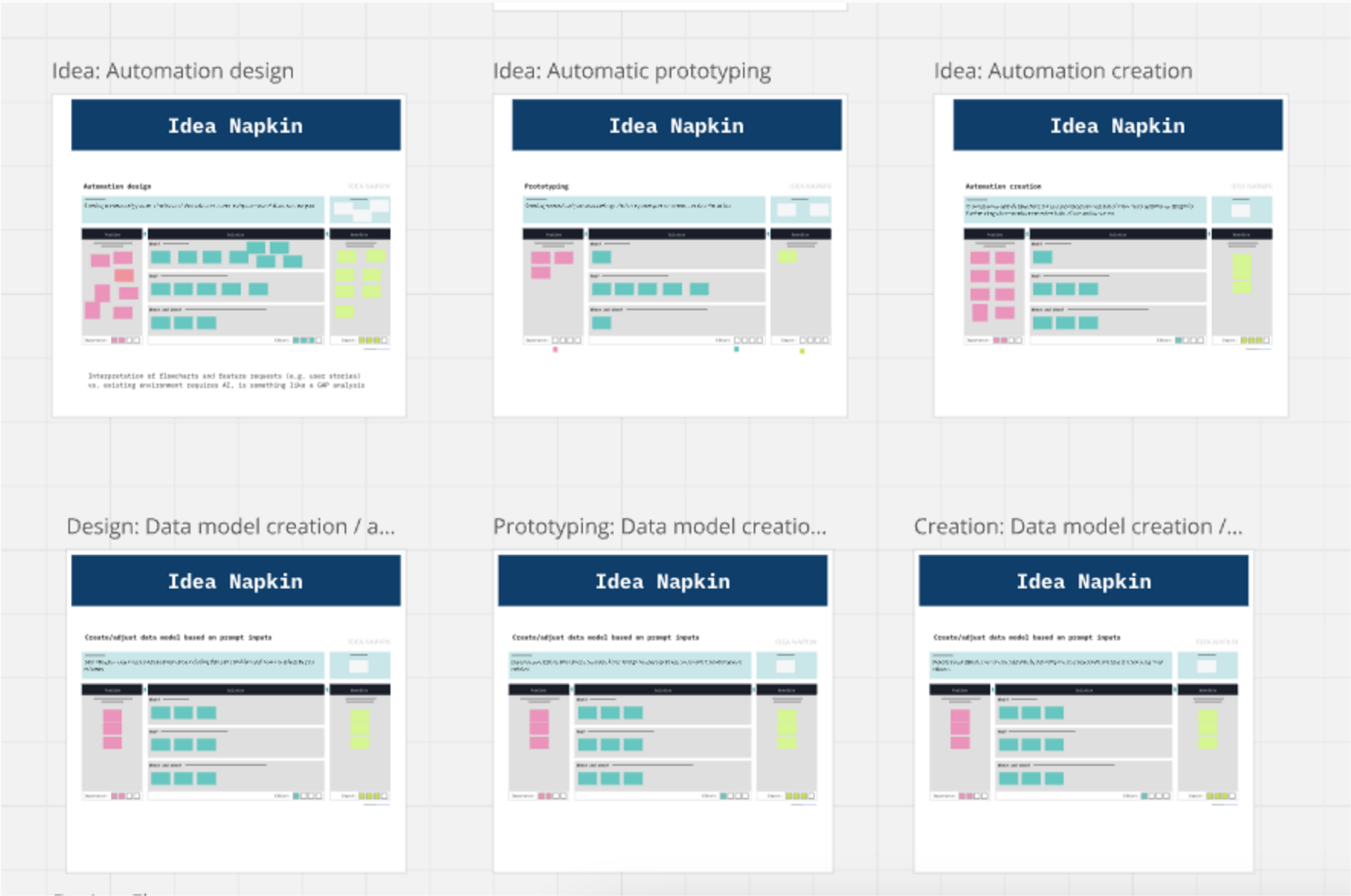
6



Extended
Discovery
Phase for New
Projects

Holistic Experience Research

Ideate



cost : 1,5k
Impact: 20% conversion rate

My main goals



**Better Alignment with
Business Goals**



**Increase Sales
Revenue of their
customers**



Improved Collaboration

better communication between
stakeholders, designers, and
developers.



**Enhance Customer
Experience and efficiency**

A Project example

Case study 2

A Project example

Company XYZ is a B2B company that uses the Salesforce app to manage its sales process. We offered them the sales optimization process services. This is what they said:

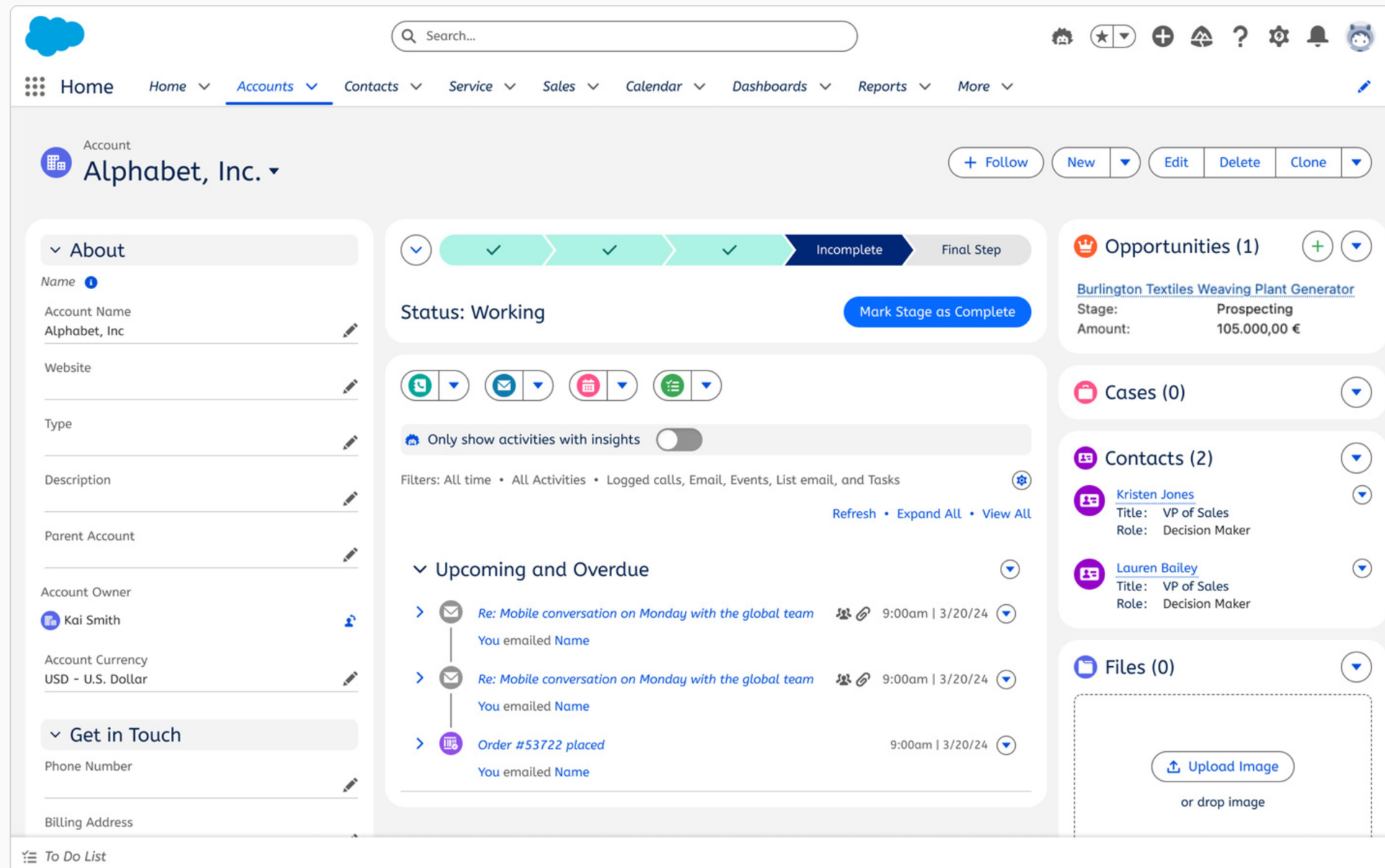
- The customer reports that their leads are not converting as expected, and Sales team feels a bit alone during the process.

Marketing manager

As a Marketing Manager, I want to analyze the quality of leads generated from campaigns and track their conversion rates, So that I can optimize our marketing strategies and ensure we are targeting the right audience.

Sales reps

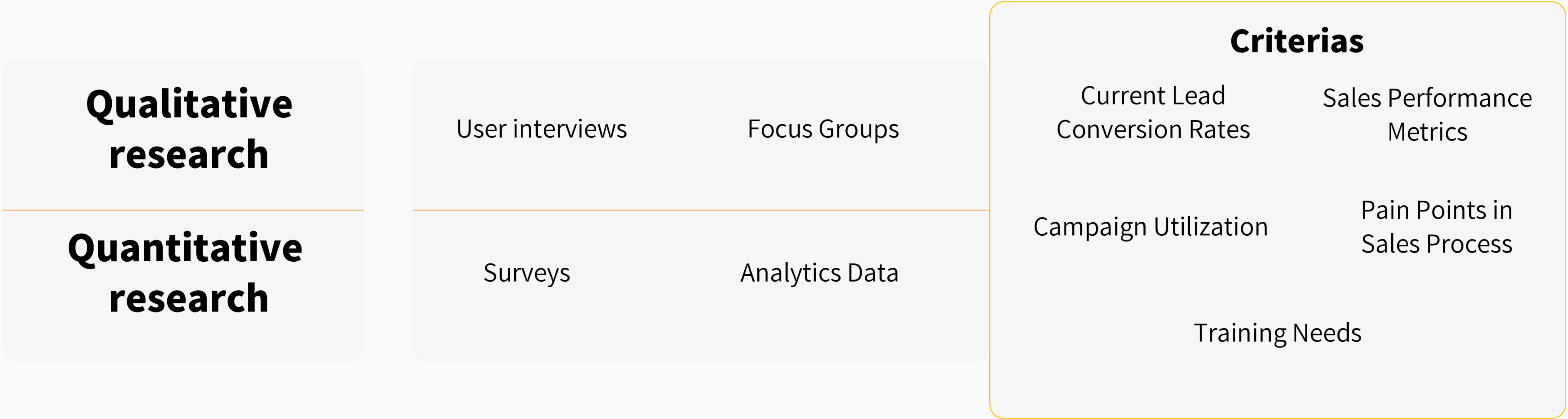
As a Sales Rep, I want to see which marketing campaigns are available and relevant to my leads, so that I can use them as conversation starters and increase the likelihood of closing deals.

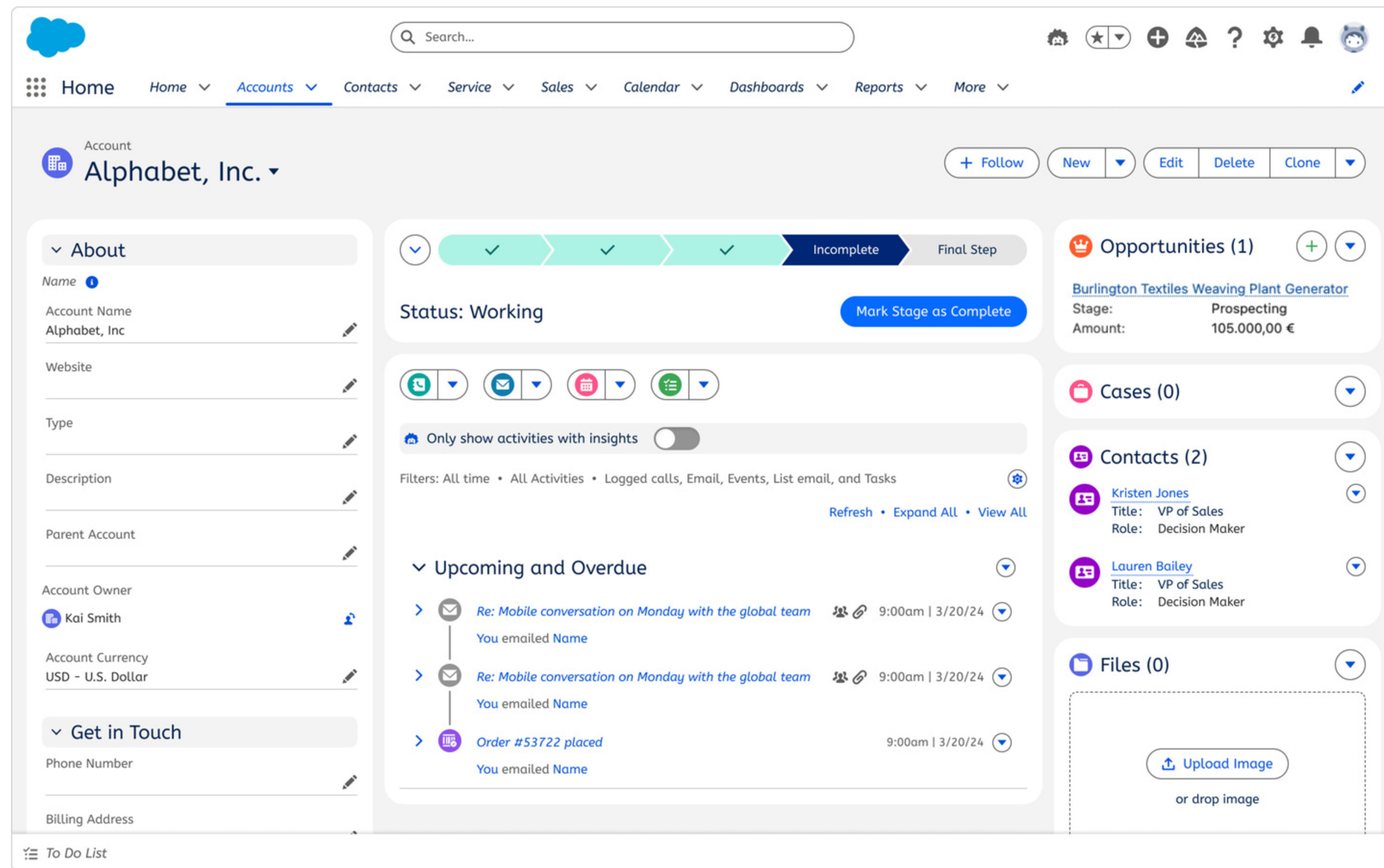


What is the account page for?

The "Account" page in Salesforce shows **company details**, **contacts**, and related **sales info**.

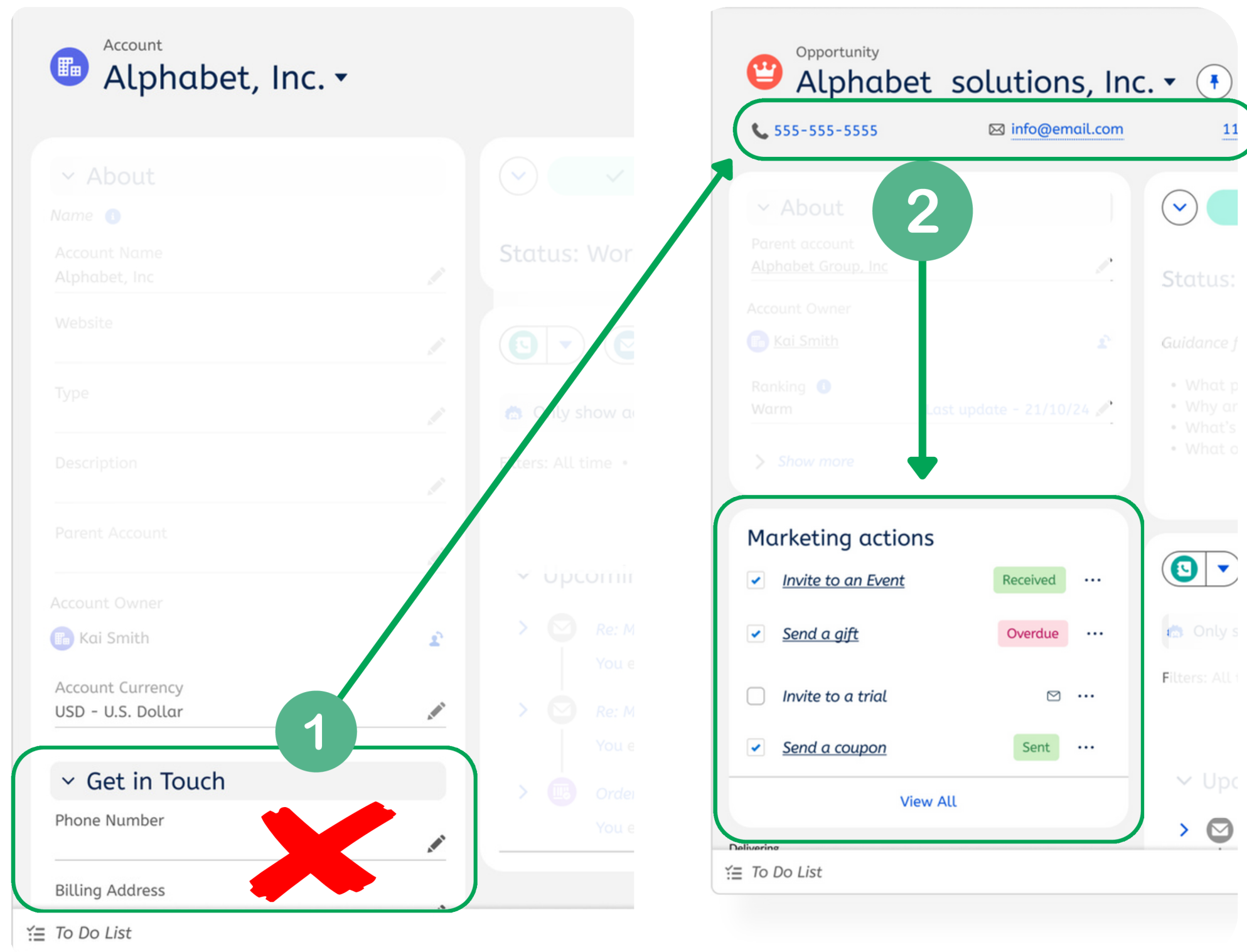
Discovering the problem





Problems

Account Page - Before



Before and after

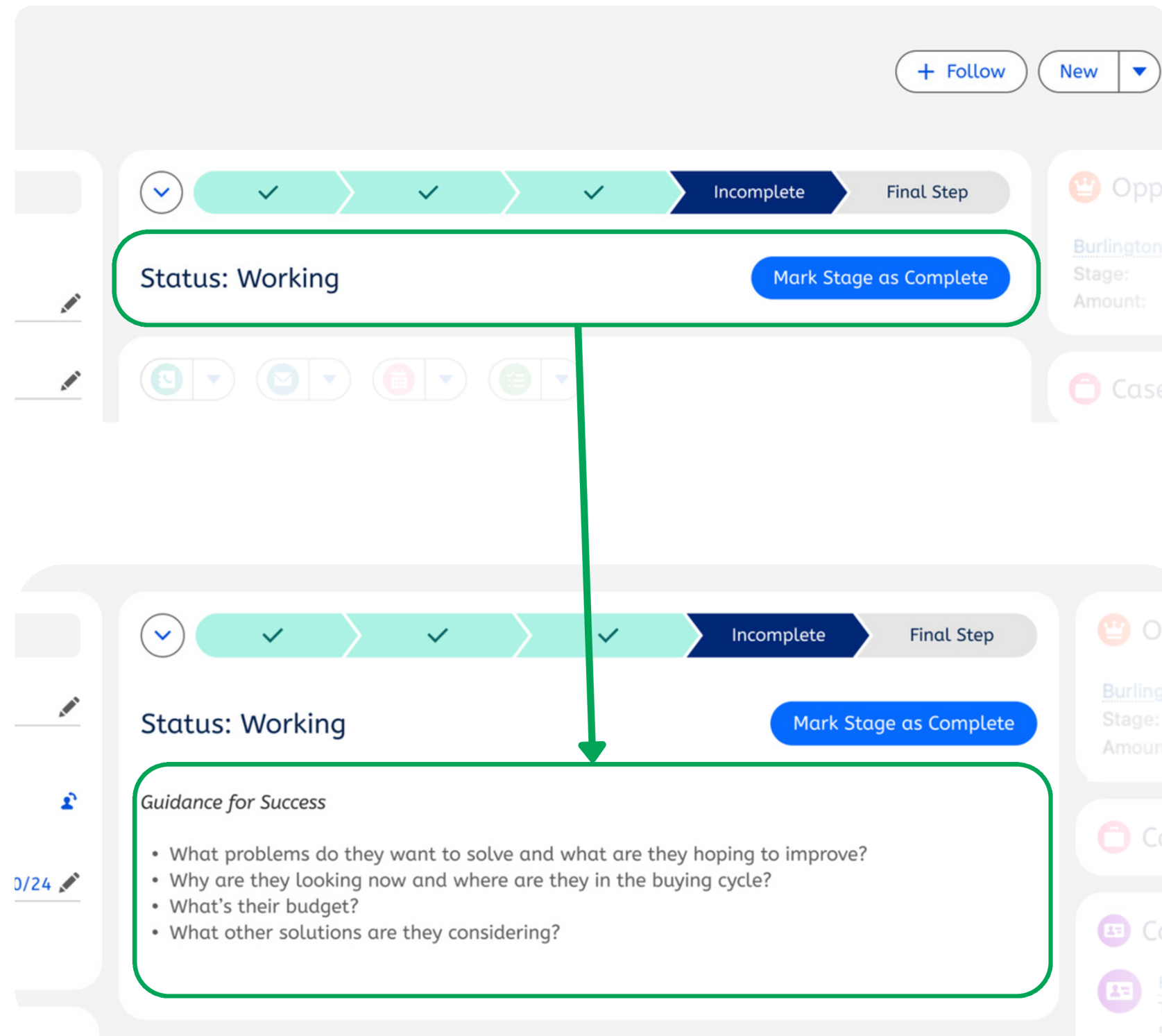
Problem 1:

- ✗ They didn't know about marketing campaigns or actions to use with companies.

Solution:

Action: Create new custom component

- ✓ The new "Marketing Actions" component shows agents recommended actions from marketing.



Account Page - After

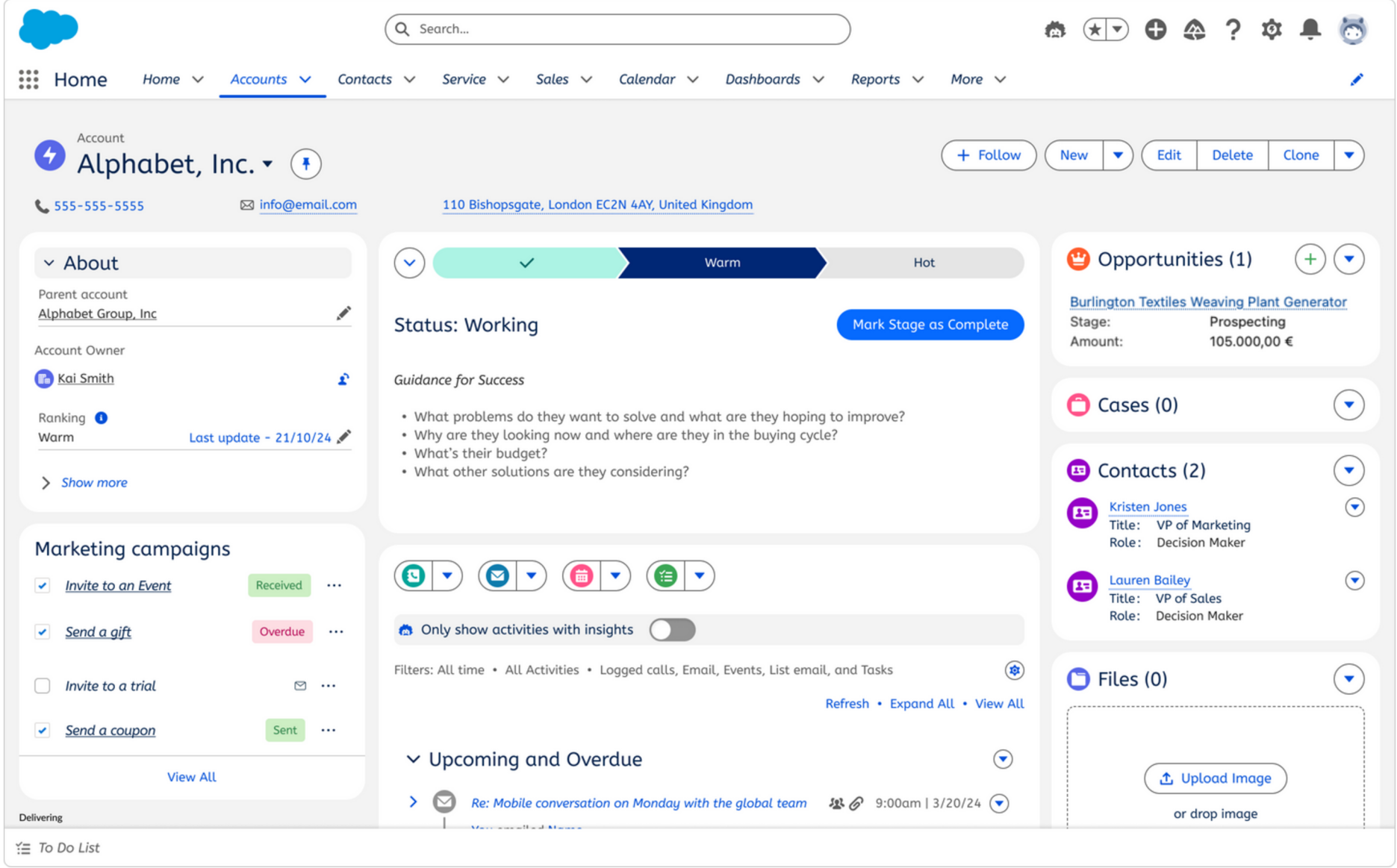
Problem 2:

- ✗ They didn't have guidance during some sales opportunities.

Solution:

Action: Add guidance

- ✓ A section was added to guide agents through the sales process, with questions and resources.



Outcome after this feature

↓ 36%

Sales Cycle Length

↑ 18%

Campaign ROI

↑ 45%

Lead Conversion Rate



Thank You

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