

Design Project: Ensignt Iteration & Adoption

LEADERSHIP APPROVED 4/30/26

Jaci Wilkinson

Overview

In this design project, research with Account Executive Ensignt users will identify opportunities for improvements in training materials and the Ensignt user guide. That research, along with Sales Leadership expectations of tool usage, will also be used to inform design changes in Ensignt that will improve the user experience.

Problem statement

In one statement, ask the fundamental question you are trying to answer in this work. It can be framed as a "How might we ____" question.

How might we increase AE adoption and usage of Ensignt so that sales leadership has access to more meaningful data to drive business objectives?

Measurable Outcomes

What are the specific outcomes will this project achieve?

1. Conduct user research with AEs to understand how the Ensignt is being used and not used. Identify any user pain points.
2. Gather Sales Leadership's expectations about what data should be entered into Ensignt and how.
3. Create design recommendations to alleviate pain points and better align Ensignt with user needs, mental models, and Sales Leadership objectives.
 - a. Get approval/agreement from Sales Leadership on which recommendations to move forward with.
4. Coordinate with Salesforce Solutions team to translate all design recommendations identified during research into planned product work in Ensignt.
5. Evaluate and then improve Ensignt training materials as needed.
6. Increase AE satisfaction with Ensignt training materials.
7. Create Sales Leadership training materials about how to access meaningful data and customized features in Ensignt.

Deliverables

Artifacts that will be delivered as part of project.

1. Provide approved design recommendations for Ensign to Salesforce Solutions product team (or Home Team if they are still doing work in Ensign).
2. Deliver a version 1 Ensign user guide before research and version 2 after design recommendations have been finalized and implemented in Ensign.
3. Modify training materials so they are better aligned with user needs and mental models.
 - a. Use a short survey to measure user satisfaction with current training materials before and after modifications are made.

Phases of work & timeline

Discover & Analyze

by May 7

- Release first draft on Ensign user guide

May

- Align on research plan for usability interviews with AEs and RDs with Leadership*
- User interviews with AEs
- Align on results of usability interviews with Leadership*

Ideate & prototype

by June 10

- Align on design recommendations with Leadership*
- Deliver design recommendations to Engage product team

Test

TBD - depends on capacity of Salesforce Solutions product team

- Implement design recommendations on Ensign staging site
- Run usability testing with AEs
- Revise design recommendations based on results of usability testing

Finalize

TBD - depends on capacity of Salesforce Solutions product team

- Align on revised design recommendations with Leadership*
- Implement revised design recommendations in Ensign
- After design recommendations have been made live in Ensign, update visual training materials in Trainual
- Finalize user guide with updated visuals and content.

Stakeholder registry

What	Who	Why
Responsible	Jaci Wilkinson	Day-to-day execution of tasks
*Leadership	Will Bishoff	Approve work
Assisting with deliverables	• Cathy Spenceri • Lynelle Mikkelsen • Ashley Armstrong & rest of Salesforce Solutions team	People who will be tapped to help provide draft content for deliverables or assist with implementation of design recommendations in Ensign.
Informed	• Ensign Steering Committee members	Folks who will receive updates at the Ensign Phase 2 Steering Committee meetings or occasionally consulted.

Touchpoints

Updates will be provided during the existing Ensign Phase 2 Steering Committee meeting series (every other Thursday at 1pm CT).

Approval for deliverables and other work product will be obtained from Leadership **via email asynchronously** to prevent bottlenecks.

Research plan details

60 minute remote* user interviews with all Account Executives over the month of May 2026. Findings from interviews will be delivered to Leadership by end of the month.

*Find 1-2 local AEs who can show Jaci how they sync the Ensign maps tool with their cars or use the Ensign maps tool while they're on the road.

What research questions to answer with interviews

(This is different from the interview script that Jaci will create and use.)

1. What are the 3-5 most important tasks that AEs do in Ensight (in their opinion)?
2. Is there anything they want to do or view in Ensight that they can't?
3. What are the goals of AEs when they are on the road?
 - a. How does previous maps system work?
 - b. How do AEs plan their driving days?
4. What different activities do they do when they aren't on the road? Why?
5. What tools/systems do AEs use alongside Ensight and how?
6. What data makes AEs feel like they understand how they are performing at their job?
7. What data makes an AE change their behavior/activities? What do they do differently?
8. How confident or not do AEs feel using Ensight? (Give them 1-10 scale)
 - a. If answer less than 7: what would make them feel more comfortable?
9. How do AEs understand and articulate the utility of opportunities in Ensight?