

AE Ensignt iteration design project interview guide

Thanks for talking with me today. My name is Jaci Wilkinson and I'm a user experience designer in IT. I'm asking you questions about how you use Ensignt as an AE. This isn't a test or being used to evaluate your work any way. I'm focused on your current behaviors using Ensignt and other related tools to work and build and maintain your book of business. I'm also trying to identify any frictions using Ensignt that make your job more difficult. My findings from these interviews will be used to make improvements and updates to Ensignt. I'm recording this session but the information you provide in this session will be anonymized.

*= Tracking the answers to this question quantitatively (salmon colored sticky notes)

MAKE SURE TO START RECORDING AT THIS TIME

Intro

Do you have any questions before we begin?

1. Do you use the Salesforce app (on a tablet or mobile device) to access Ensignt?*
- a. If yes: What % of the time are you using Ensignt in the app?
2. Do you use a browser/desktop to access Ensignt?*
3. How often do you use Ensignt?*
- a. Daily (If daily: during what times of the day)
 - i. constantly
 - ii. in the morning at the start of my day
 - iii. throughout the day
 - iv. at the end of the day/wrapping up my day
- b. 1-2/week
- c. 1-2/month
- d. Less than once a month
4. What are the top 3 most frequent activities you are doing in Ensignt?*
5. How confident do you feel using Ensignt on a scale from 1-10 (10 being super duper confident)*

Opportunities

1. What is the value of having an opportunity in your mind?

2. Do you have any closed opportunities yet?
 - a. If yes, show them to me.*
 - b. If no, show me where you would go to view them.*
3. Define for me what each stage of the opportunity pipeline means to you*:

Stage	Definition of stage	When do you move to the next stage
Targeting		
Discovery		
Recommending		
Proposing/presenting		
Negotiation		
Closed won/closed deferred		

4. Can you show me what the average time it takes between signing new account and them selling their first Homesteaders policy*?

Activities

5. Show me how you most often schedule a task*.
6. What things do you schedule a task for?
7. When do you schedule a task?
8. When do you log outreach? Why do you use this option instead any of the other ones?
9. Do you ever assign yourself tasks related to current accounts*?
 - a. If so, show me an example.

Data & Account maintenance

10. Is there any data you would like to be able to log or see in Ensign that you can't currently?
11. What do each of the large numbers mean on the AE dashboard*?
 - a. If any are red:
 - i. why is that number red*?
 - ii. what do you need to do to make it not red*?
12. What Ensign data do you think best shows how you are performing?
13. Show me other dashboards you use to track your own performance.
14. Could you take me to the funeral home account page in Ensign for the funeral home you think is most underperforming*?

Maps

15. What % of the time are you on the road*?
16. How does your Ensight use change when you are on the road?
17. Do you use the Salesforce Maps app or the Maps section (browser)*?
 - a. If yes: show me the Maps section of your Ensight and any routes or schedules you have set up.
 - b. If not: why? do you use another map system?

Wrap up

1. If you have questions about Ensight, who do you go to*?
2. Are there any other activities you do in Ensight that we haven't covered?
3. Is there anything you would like to be able to do in Ensight that you can't currently?
4. Do you have any feedback about Ensight right now?