



VP_UX

UVP Dashboard User Research Q3_2025

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Research Goals

1. Understand the perception and use of the current dashboard
2. Understand how reps use data to work with Vendors and sell GDM
3. Gather feedback on the new dashboard concepts (PPC, PPL, & Profile sections)

Account Rep Participants



Laura Siu
Strategic Account Manager



Justin Steffgen
Strategic Account Manager



Ellie Dickerson
Mid Market Account Manager



Ryne Hensley
Business Development



Sargam Bhanot
Customer Success



Fabricio Oliveria
Customer Success



Amisha Chopra
Customer Success

Part 1

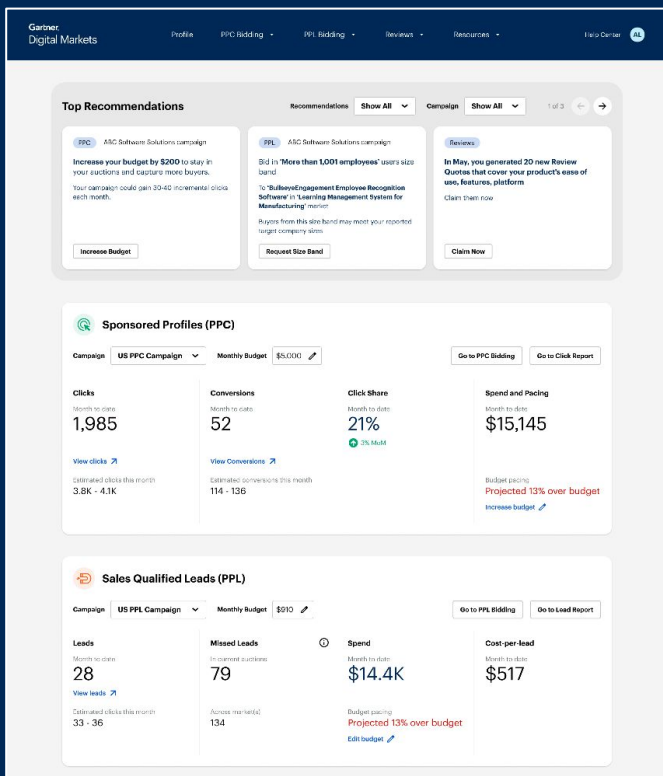
Dashboard Feedback

Current and New versions

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Current Dashboard



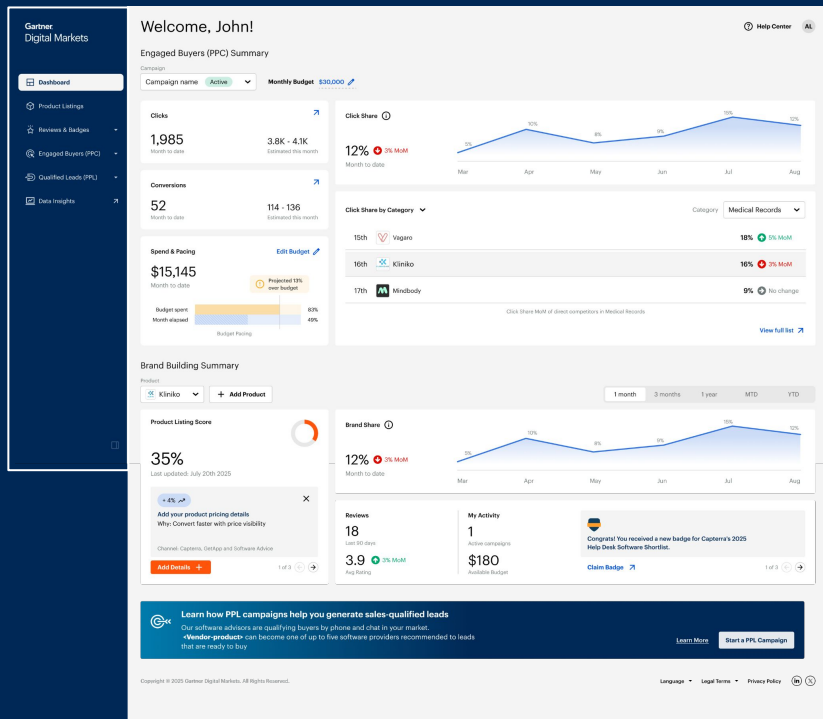
Most Reps do not use the Dashboard, or use it infrequently

Reps across sales channels tend to use the specific pages they are working in - like profile, or the PPC/PPL pages when working with vendors or doing analysis.

- Reps felt the data was repetitive to the data in other pages, so preferred the pages with more utility
- The general feeling was - it's not bad, but there are common questions from vendors around specific metrics (click share, brand share, missed leads)
- Reps mainly used the dashboard to show vendors recommendations - but then used outside tools to go more in depth.

New Dashboard

General Feedback

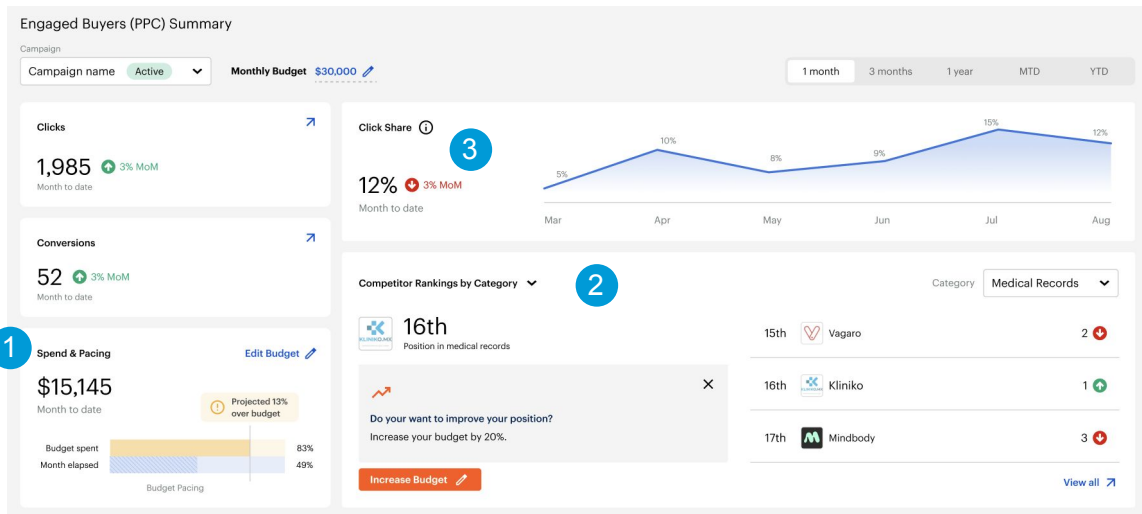


Most reps feel the new dashboard overall will better enable them to work with vendors

Reps showed positive sentiment for the new layout and additions to the new dashboard - however there is some refining that needs to be done to specific sections.

- Reps loved the addition of spend & pacing and competitor insights
- They recommended showing giving more actionable insights to metrics like click share and missed leads
- Reps felt there may be some opportunity to work in additional market and competitor data to drive further engagement

PPC Section Feedback



3 Click Share

+ Reps felt a visual on click share over time would be really useful

➡ However, there is still more desire to have this metric be more actionable and trackable (event history)

1 Spend and pacing

+ Universally liked by reps

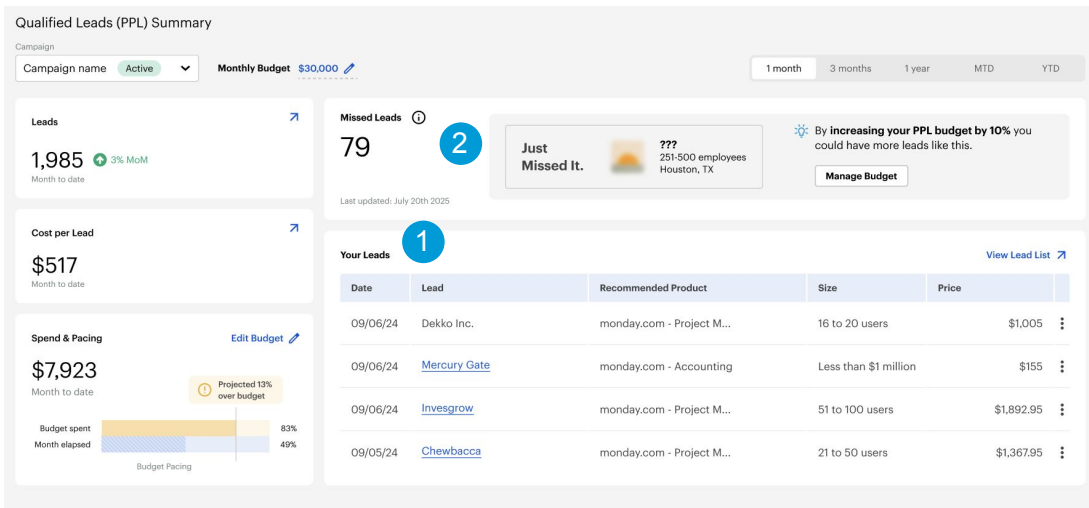
➡ Add in what the budget change would be to fix the problem

2 Category Expansion/ Competitor Ranking

+ Reps really excited by this addition

➡ A lot of confusion on how the rankings were calculated

PPL Section Feedback



1 Lead List

- + Most reps felt this section was helpful, although one strategic rep did not.
- ➡ A few reps mentioned adding in appointment setting information - as this is something you have to “dig” to find.

2 Missed leads

- + Reps were excited to expand this section as it is a metric they often get questions on.
- ➡ There is a strong desire across reps to be more clear on what this metric means - and how the lead was actually missed (were they too low in the auction, is it a size band they are not in, did the user already have their product).

Part 2

Insights and Opportunities

How we can bring proven sales strategies to VP

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Competitor Data is King.



Like I said, a lot of vendors are always asking what are my competitors doing, and making sure (they're) standing out against them.

-Ellie Dickerson

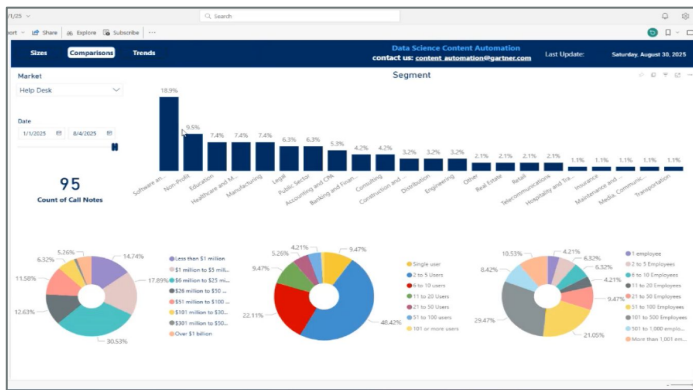


“The competitive edge is another thing that we're leveraging a lot, right? Your competitors are present in this category, but you're not. Your competitors are getting leads from this market, but you're not.

-Justin Steffgen

Every rep interviewed mentioned not only that they consistently use competitor and market data in their selling process, but how eager vendors were in performance calls to learn what their competitors were doing.

How reps use market & competitor data



Lean heavily on buyer intent data

Reps use a series of PowerBI dashboards with buyer data to identify and present opportunities to vendors in their performance calls.

Immediate recommended campaign optimizations

Category	Q1 Enterprise	NetSuite	Sage
Accounting	X	X	X
Accounts Payable	X	X	X
Accounts Receivable	X	X	X
Billing and Invoicing	X	X	X
Financial Reporting	X	X	X
Payment Processing	X	X	X
Construction Management	X		X
Inventory Management	X	X	X
Warehouse Management	X	X	X
Sales Tax	X		
Payroll	X		
ERP		X	X
Financial Management		X	X
Retail Management Systems		X	
Business Management		X	X
Distribution		X	X
Inventory Control		X	X
Manufacturing		X	X
Order Management		X	X
Supply Chain Management		X	
eCommerce		X	X
Budgeting		X	X

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Your competitors, NetSuite and Sage, have a large footprint on Gartner Digital Markets. They each have 25-30 upgraded categories in the United States, capturing more of the total addressable buyer market.

As enterprise resource solutions, their strategy expanded from financial categories, which focuses on functionality, to more industry-related categories. Enterprise buyers visit industry-related categories to solve the very specific needs of their business.

NetSuite and Sage personalize this approach by tailoring their content, ad copies, and landing pages to each industry. This allows them to engage buyers, leverage pain points, and "sell the suite" to close deals.

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Leverage publicly available information

Reps use "publicly available" data about the vendor's competitors to create a sense of fomo and drive expansion.

Part 3

Vendor Testing

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Insight 1

Vendors find the new dashboard to be an improvement over the current version



“[The old one] feels more basic and bland, whereas the new one feels more like a dashboard... It looks more executive.. I can’t wait until you release it.”

- Kendall, CEO of Forms on Fire

When asked about his feeling of the new dashboard vs. the current version.

Vendors find the new UI and layout to be more “in-line” with what they expect from a dashboard experience.

- The improvements to the fundamental layout of the dashboard results in a better experience and increased perception in value.

Vendors find the “Spend & Pacing” and “Ranking by Click Share” to be high value additions to the dashboard experience.

- These sections also seem to contribute a great deal to the increased perceived value by users as it adds additional information that is not found elsewhere in the Vendor Portal.

Insight 2

Among the vendors interviewed, the dashboard was rarely—if ever—used. All participants mentioned the click report as the primary page they used.

Vendors preferred to go directly to the pages that contained the information they were looking for - whether they did their analysis in vendor portal or externally.

- Some vendors mentioned wanting to see a campaign-level overview on the dashboard.

When Vendors were asked to go through the Dashboard, they spent most of their time going through recommendations.

- This highlights a potential need to re-focus on how recommendations or alerts are handled in the new dashboard experience

Recommendations and Next Steps

1. Explore ways to make click share, brand share, and missed leads section more actionable and understandable.
2. Refine PPC category expansion (competitor) module.
3. Explore state of PPC section when autobidder is enabled (this will affect spend & pacing module)
4. Refine PPL lead list module to include appointment setting information or replace with buyer insights data.
5. Explore further treatment of recommendations and notifications
6. Explore a campaign level overview version of the dashboard.
7. Continue to refine and explore ways to implement competitor and market data into the dashboard, and other VP pages.