Optimizing Price Agreement Process for Seamless Customer Deals

Waresix



The product:

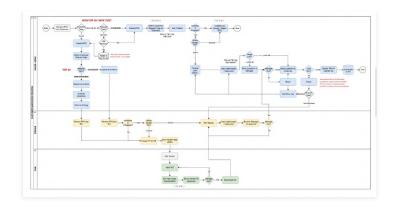
The price agreement system involves three key teams:

- 1. Sales Team: Gathers and secures orders.
- 2. Supply Team: Finds vendors to fulfill these orders.
- 3. Pricing Team: Sets the order prices.



Project duration:

July 2023





The problem:

The Supply team takes too long to find vendors, causing delays for both Pricing and Sales teams.



The goal:

Reduce the Supply team's process time, thereby speeding up the overall price agreement process.



My role:

- UX Researcher
- UX Designer
- UX Writer



Responsibilities:

- User research
- Ideating solutions
- High-fidelity prototyping
- Usability testing

User research: summary

We shadowed the Supply team to understand their daily activities and identify bottlenecks.

We discovered they handle numerous orders, including duplicates, and struggle to find vendors for complex requirements.

User research: pain points

1

Duplicate Order

Repeated work on the same orders wastes time.

2

Difficult Order

Complex requirements are hard to fulfill.

3

Multiple Vendor

Each order needs several vendor alternatives.

4

Vendor Response

Vendors are slow or unresponsive.

Persona: Adit

Problem statement:

Adit is a Supply Officer who needs to find multiple vendors for each order, often dealing with duplicates or difficult requirements.



Photo	Person a	Demographics	Description	Catchphras e	Goals	Frustation
	Muham mad Ikhsan	Age 25 Education Sekolah Tinggi Transportasi Darat	Ikhsan bekerja sebagai VM Officer di Waresix. Ikhsan setiap harinya membantu vendor waresix untuk mendapatkan pelunasan. Ikhsan juga membantu tim Pricing untuk mendapatkan	"Semoga bisa mendapatkan harga vendor yang sesuai untuk PH dengan cepat."	Mendapatkan dan mengirim harga vendor ke tim Pricing untuk pengiriman customer	Sulit mendapatkan harga yang sesuai target pricing dari vendor
		Hometown Bekasi Family Istri Occupation	harga dari vendor untuk pengiriman customer.		Membantu kegiatan vendor	

User journey map

Supply tasks to find vendors take a long time, causing a bottleneck in the overall price agreement process.



Goal: Mengerjakan PH yang dikirim oleh Pricing

Action	Melihat dan mencari PH yang perlu dikerjakan	Menyiapkan file PH untuk dikirim ke Vendor	Mengirim file PH ke Vendor	Merekap Harga Vendor	Menugaskan Vendor ke PH di sistem	Menginput VQ PH
Task List	Membuka sheet PH Matchmaking yang dibuat oleh Lead Melihat PH mana saja yang harus dikerjakan Mencari PH di sistem	Download file PH Mengurangi target harga pricing. Menambahkan kolom "Harga Vendor untuk tempat vendor mengisi harga.	Mencari vendor dengan fleet sesuai PH yang user handle di Qiscus. Share file PH ke vendor dan meminta mereka untuk mengisi.	Menerima file yang sudah disi oleh vendor, atau chat Melakukan negosiasi harga. Merekap harga yang sudah oke di sheet rekap harga semua PH yang dikerjakan semua officer.	Menunggu sampai mendapat 3 vendor Mengerjakan PH dengan cari vendor dan bikin VQ.	Input form VQ: Harga, Lead Time, Berlaku Hingga, Catatan. Kirim VQ ke Manager
Feeling Adjective	Bingung	Bingung Kewalahan	Bingung Segan	•	Khawatir	Ragu-ragu Kesal Bingung
Improveme nt Opportuniti es	Pada Daftar PH, tambah info lokasi muat untuk identifikasi scope area PH. Hanya tampilkan PH yang sesuai dengan scope area user. Pada Dashboard PH Matchmaking Tambah info assigned officer. Apabila belum ada	Pada file PH yang di- download, tambah kolom "Harpa Vendor".	Saat cari vendor PH, Tambah into berapa line item PH yang dapat dipenuhi oleh vendor berdasarkan fleetriya. Ada opsi share PH atau Line Item PH ke WA Develop fitur gunakan VQ akidf Ketika user	Pada Dashboard PH Matchmakin q. tambah info VQ yang sudah dibuat untuk PH beserta detail inputnya.	Officer bisa memberikan tanda apakah PH sudah bisa dikirim ke Picing atau belum. Manager tetap bisa kirim regardless of tanda PH.	Develop fitur perpanjang line item VQ on call. Field Lead time otomatis terisi dan editable. Edit VQ yang sudah dikirim ke manager sebelum quotation diterima Ada action untuk download VQ yang nempel

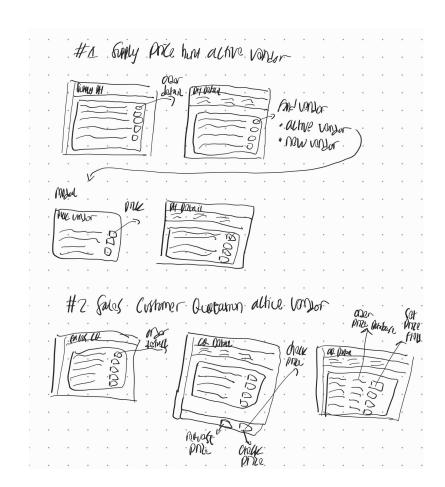


Supply Team Shadowing

Rapid sketching

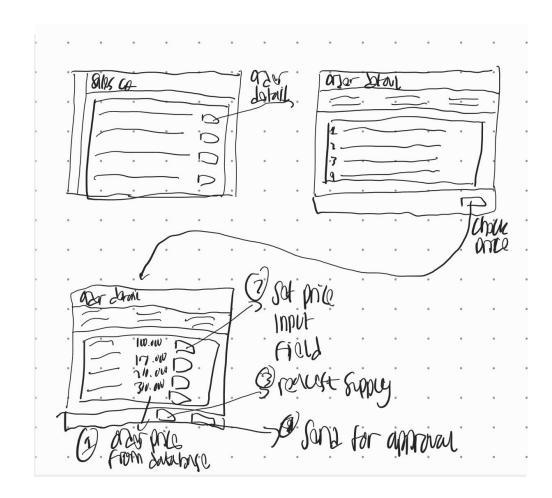
To address the issues, we proposed two solutions:

- Help Supply fulfill duplicate orders using a database.
- Direct Sales to handle customer orders.



Rapid sketching

We chose the second option to manage the high volume of orders. This required Sales to take on some Supply and Pricing tasks, so we sketched the idea to gain stakeholder approval.



Concept testing

We tested the new process with managers from Sales, Pricing, Supply, and Engineering. They supported the new process but suggested a few adjustments for a smoother implementation.

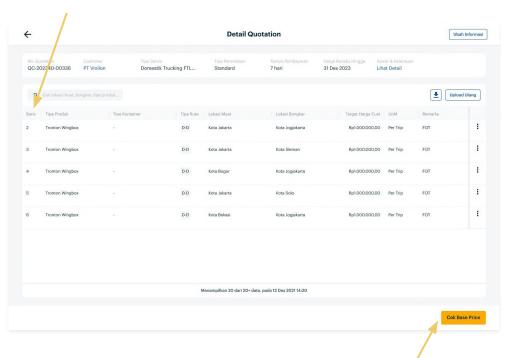
Concept testing findings

- 1 Notify users of profit or loss when setting order prices.
- 2 Automate order approval for non-profit loss prices.

High-fidelity prototype

We developed a high-fidelity prototype based on feedback and tested it with Sales officers. First, users can check order prices from the database.

The user list all the customer order

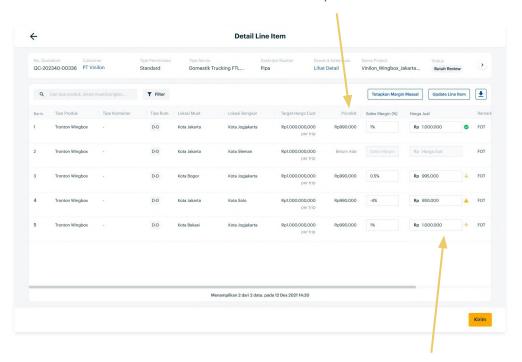


The user check customer order price

High-fidelity prototype

Users can set prices with profit/loss indicators.

The system show available order price

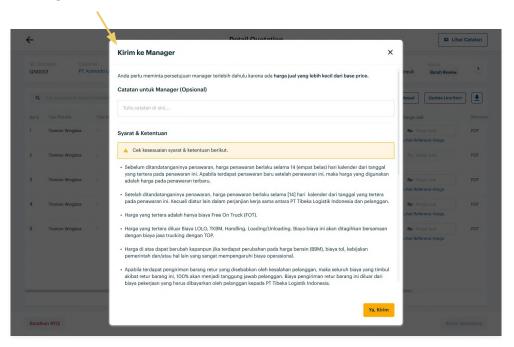


The user set the order price

High-fidelity prototype

Informed users when an order requires manager approval and allowed additional messages.

User will be informed when the order need manager approval



Usability testing

We tested the new process with five Sales officers and identified several usability issues.

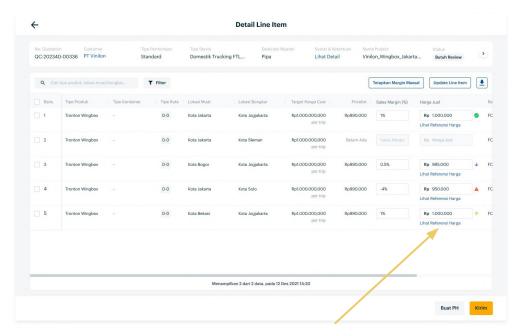
Usability testing findings

- 1 Sales need to see order price history for reference.
- 2 Better profit/loss indicators are needed.
- **3** Request price for orders without price history.

Mockups

We iterated the mockups based on usability testing feedback. First, we added an action to view order price history.

After usability study

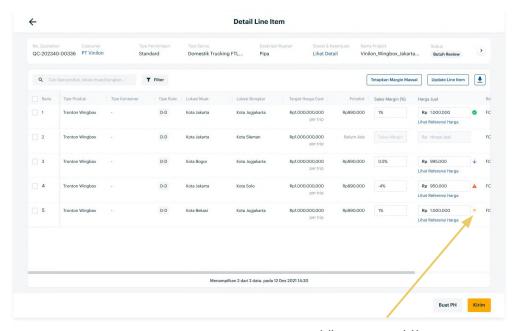


When user click the action, the system will show price history

Mockups

Improved profit indicators with clearer icons and colors.

After usability study

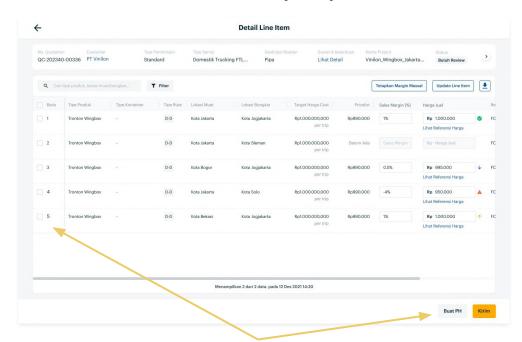


When user set the price, the system will show better profit indicator

Mockups

Added request price action for order without price history.

After usability study



User can select and request price for order without price history.



Sales Team Usability Testing

Accessibility considerations

1

Developed a responsive web app for desktop and mobile use.

2

Improved UX writing by combining general and industry-specific terms.

3

Ensured icons and colors for profit indicators are easily recognizable and pass color contrast checks.

Takeaways



Impact:

The new process reduced the Supply team's workload, leading to a 57.2% decrease in the time needed to process price agreements.



What I learned:

Regular evaluation is crucial. Without it, we might miss deviations from the optimal process.

Next steps

1

Evaluate the price agreement process from Sales and Pricing perspectives to identify further improvements.

2

Conduct a thorough design evaluation to identify system design issues.

3

Engage with users and engineers to strategize the development of the price agreement system.

Transforming Student Educational Journey

Rumah Siap Kerja



The product:

Rumah Siap Kerja partners with the Indonesian workforce program, Kartu Prakerja, to provide training for underprivileged and graduates, helping them start their own businesses or build their careers.



Project duration:

December 2020 - January 2021









The problem:

- Users struggle to navigate the system.
- The website's visual design and branding are unattractive and inconsistent.



The goal:

- Create a seamless user journey on the website.
- Improve the website's visual design and branding.



My role:

- UX Researcher
- UX Designer
- UX Writer



Responsibilities:

- User research
- Design evaluation
- Competitor audit
- High-fidelity prototyping
- Usability testing

User research: summary

1

We analyzed customer service tickets and conducted phone interviews to pinpoint user pain points and expectations.

We found that users had difficulties creating accounts, purchasing classes using Kartu Prakerja, accessing purchased classes, and completing classes to obtain certificates.

User research: pain points

1

Register Account

Users found it cumbersome and invasive due to the many required fields, including personal information.

2

Purchase Class

Users faced issues with the Kartu Prakerja system.

3

Access Class

Users struggled to access the classes they bought.

4

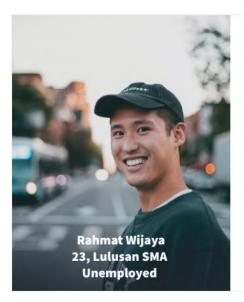
Finish Class

Many users stalled or didn't finish their classes.

Persona: Rahmat

Problem statement:

Rahmat is a recent
undergraduate who
wants to purchase
classes using Kartu
Prakerja and complete
them to earn certificates.



"Kelas yang mudah dan gampang dipahami, kelas apa ya? Aku ingin mempelajari skill agar dapat membuka usaha atau mendapatkan pekerjaan."

Latar Belakang

Rahmat adalah pelajar yang sudah lulus SMA namun hingga sekarang masih mencari pekerjaan tetap. Ahmad ingin mempelajari skill baru yang mudah untuk dicerna dan dipahami. Ahmad ingin tahu siapa yang mengajar dan cara pengajaran pelatih.

Motivasi

- Mendapatkan informasi cara mendapatkan pekerjaan
- Mendapatkan informasi cara memulai bisnis
- · Mempelajari skill baru

Masalah

- · Rahmat memiliki akses internet yang terbatas.
- · Rahmat memiliki device yang terbatas.

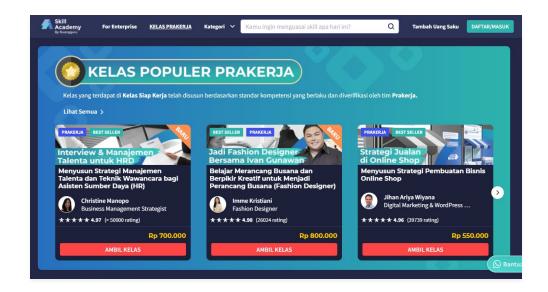
Design Evaluation

We identified design issues
by referencing
Shneiderman's 8 Golden
Rules, focusing on
consistency, reducing
memory load, and providing
informative feedback.



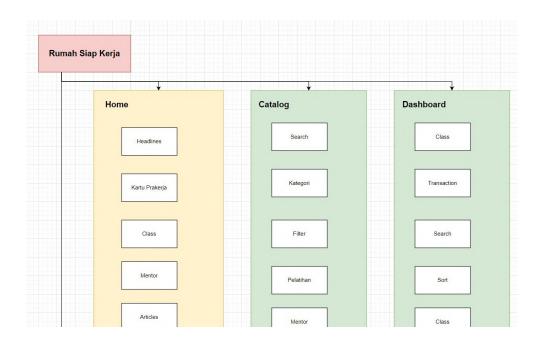
Competitive Audit

We analyzed direct and indirect competitors (like Ruangguru and Udacity) to learn what worked well in their products and identify gaps we could address.



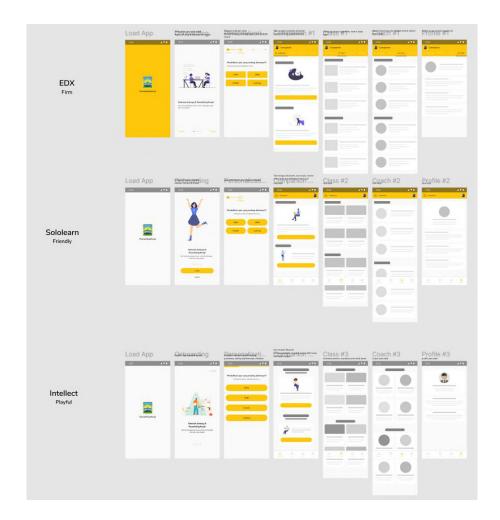
Information architecture

We restructured the website's information architecture to improve user navigation and limit the displayed information to keep users focused.



Digital wireframes

We created several visual design alternatives for key pages and presented them to stakeholders to secure buy-in and gather feedback.



Expert review

We conducted an expert review with stakeholders (C-level, marketing, operations) to collect feedback for design iteration.

Expert review findings

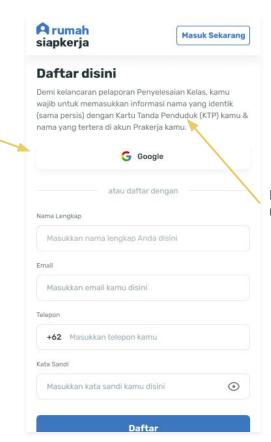
- 1 Visual design needs to be both professional and friendly.
- 2 UX writing should be professional yet approachable.
- **3** Users should complete tasks in a few steps.

High Fidelity Prototype

Register or login using

social media

We developed a high-fidelity prototype based on feedback and tested it with users. First, we simplified registration by deferring some fields until class purchase and providing social media login options.



Inform user about registration info

Added class review to help

convince user

Added class reviews and made the purchase action more prominent with sticky footers.



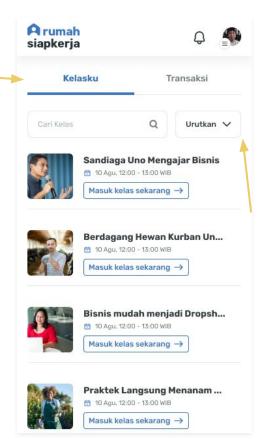
Use sticky footer to make the action prominent

Saved preferred payment methods for easier repeat purchases.

Pembayaran Saving user preferred payment Metode Pembayaran Ubah Metode / method ocakerja Kartu Prakerja Pilih Mitra Platform untuk membayar pelatihan menggunakan Saldo Pelatihan Prakerja kamu. tokopedia Bukalapak PHAUBELAJARAPA Tukarkan kode voucher prakerja yang telah kamu bayar. Tukar Kode Voucher

Organized the user dashboard with tabs, search, sort, and filter options.

Using tabs to organize user activities



Provide navigation method in user dashboard

Usability Testing

We conducted remote usability testing with five users, identifying several issues to address.

Usability testing findings

- 1 Users found it hard to distinguish regular and Kartu Prakerja classes.
- 2 Users didn't understand what was included in a class.
- 3 Users struggled to redeem Kartu Prakerja vouchers.

4 Users had trouble finding class completion certificates.

We iterated the mockups based on usability testing feedback. First, we added Kartu Prakerja tags to differentiate these classes from regular ones.

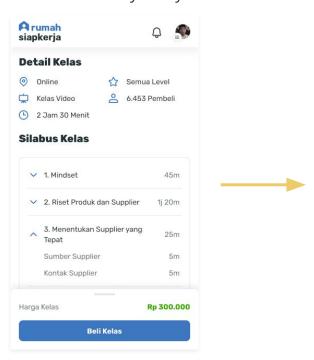
Before usability study

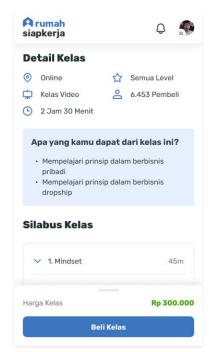




Provided a summary of class contents, including training kits and certification.

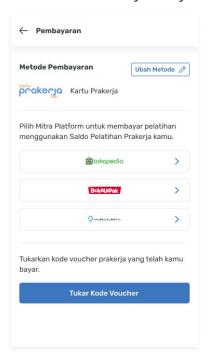
Before usability study

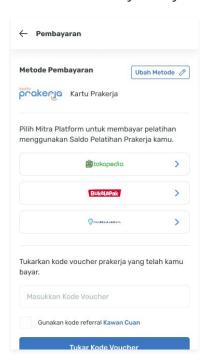




Automatically chose the
Kartu Prakerja payment
method and we outlined
and simplified the steps to
use it.

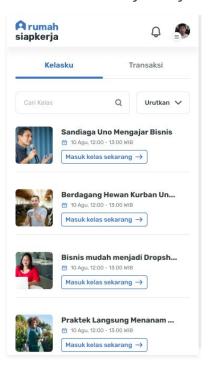
Before usability study

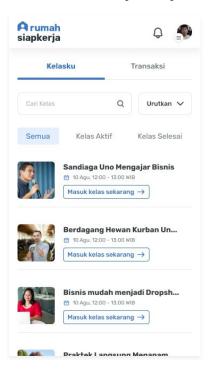




Added filter for ongoing and completed class for simpler certification access.

Before usability study





Takeaways



Impact:

The redesign led to a 1.177% increase in total users, an 8.746% increase in class sales, and an 8.179% increase in class completions compared to the previous year.



What I learned:

Collaboration is essential. Working with PMs, engineers, stakeholders, and users provides new perspectives, development feasibility, and project consistency.

Next steps

1

Summarize the design to create a design system and guidelines.

2

Present the design to the engineering team for development and adjust existing components.

3

Adapt the design for tablet resolution.

Elevate Waresix Design System Usability & Accessibility

Waresix

Project overview



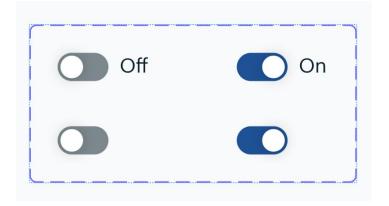
The product:

Waresix developed its own design system, including foundational elements (typography, color, iconography) and components (buttons, input fields, checkboxes) to ensure consistency and productivity across projects.



Project duration:

October 2023



Project overview



The problem:

- Designers inconsistently using the toggle component.
- Usability and accessibility issues with the toggle component.



The goal:

- Standardize toggle usage across projects through guidelines.
- Improve toggle visual design and accessibility.

Project overview



My role:

- UX Researcher
- UX Designer
- UX Writer

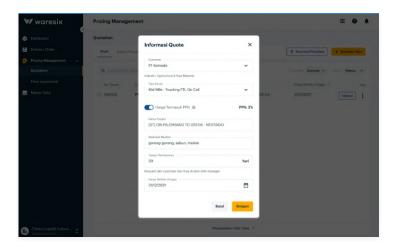


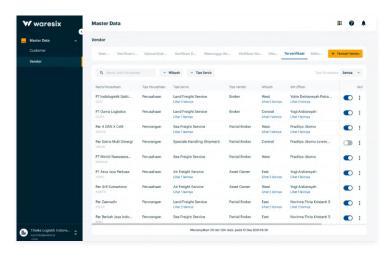
Responsibilities:

- User research
- Design evaluation
- Competitor audit
- High-fidelity prototyping

Design evaluation

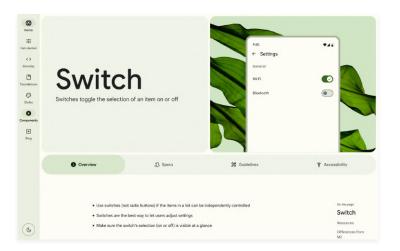
We evaluated how
designers utilized toggles in
their projects,
understanding the context
and role of the toggle in
each design.

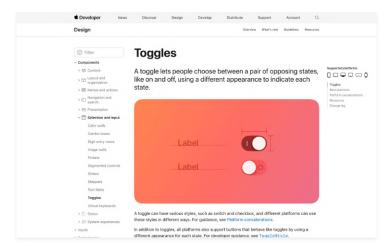




Competitive audit

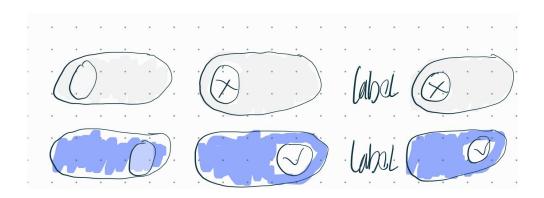
We studied other design systems (Google Material, Apple Human Interface) to understand the purpose, design, and guidelines for toggles.





Rapid sketching

Based on our design
evaluation and competitor
audit, we sketched
improvements for the
toggle component.



Expert review

We conducted expert reviews with other designers, identifying usability issues to address.

Usability testing findings

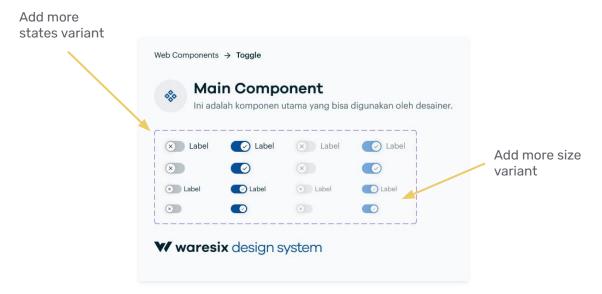
- 1 Remove variant without an icon.
- 2 Write component specifications.
- 3 Write comprehensive component guidelines.

High-fidelity prototype

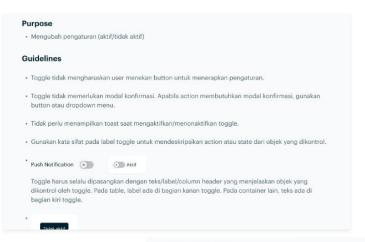
Incorporating stakeholder feedback, we enhanced the visual design of the toggle component, wrote the component specifications, and developed guidelines. We added icons by default to aid users with color vision deficiencies.



Added more component states (disabled, selected-disabled, hover, focus, press) and size variants for both desktop and mobile.



Created detailed guidelines covering an overview, purpose, best practices, usage examples, and placement.





Expert Review

We conducted expert reviews with engineers and product managers, who supported the improvements but suggested further adjustments.

Expert review findings

1 Adjust the component to align with the Ant Design library used by engineers.

Accessibility considerations

1

Used icons to help colorblind users distinguish between component states.

2

Added a variant with a label for user clarity.

3

Incorporated various states in the toggle to assist users with disabilities, such as screen readers.

Takeaways



Impact:

Standardizing toggle component usage and integrating accessibility best practices improved usability and ensured a more inclusive experience within the Waresix ecosystem.



What I learned:

Leveraging insights from team members and other companies' design systems accelerates the evolution of our design system.

Next steps

1

Evaluate and improve guidelines for other components.

2

Test the engineering development process.

3

Evaluate system accessibility comprehensively.

Let's connect!



Exploring remarkable challenges and opportunities? Let's collaborate and build something great!

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