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Ally Hangartner: UX Design Portfolio

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Biglytics: An Ideal Demo Environment for the HubSpot Sales Team

Description:

Going back to 2010, there is evidence of efforts made to create an ideal demo enviroment for the HubSpot sales team. When I joined the team in early summer 2016, the foundation for the project had been set and they wanted to bring in a designer to help the vision come to life. The Biglytics project was/is a massive undertaking that requires web and graphic design, understanding the basics of inbound marketing, and creating collaborative partnerships across the company.

Project Goal:

The ongoing goal of the Biglytics project is to continue to provide a great demo environment for the sales team and keep the demo portal up to date and clean, as well as provide training materials on new features and additions.

Phases:

1

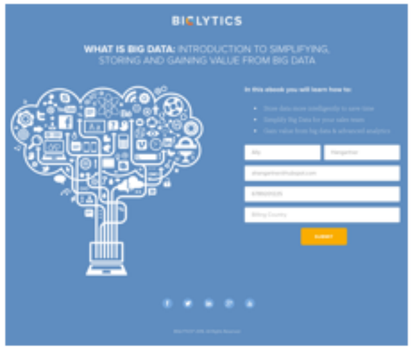
Phase 1 was focused on content creation. With a website built on the COS platform, the focus was to create demoable examples (customizable when possible) of the content tools (landing pages, emails, blog, etc). This also helped further develop the Biglytics company story.

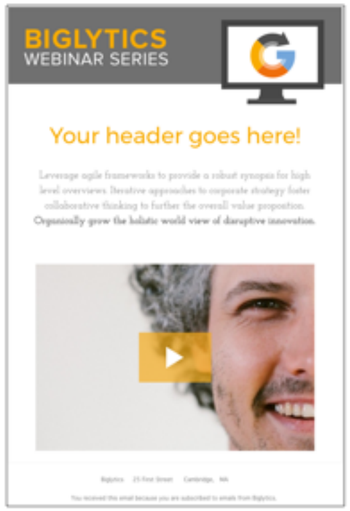
2

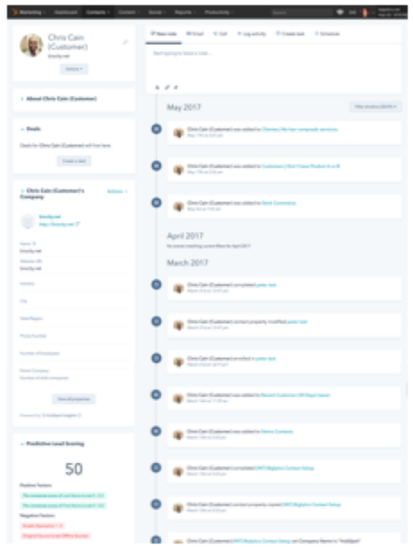
Phase 2 focused on providing data. One of HubSpot's most powerful features is the data and analytics you can gather throughout the tool set. In collaboration with product, we were able to inject fake data into the demo portal and create powerful use cases that had supporting data.

3

Phase 3 is an ongoing effort to create powerful, unified demo 'stories' that span multiple tools and connect HubSpot Sales, Marketing and CRM. This is a parellel effort to HubSpot's company-wide One HubSpot initiative to promote the Growth Stack.







Project Review:

It has been awesome to be part of a project that has had such a global impact. Ideally the project will continue to develop and grow in parallel with HubSpot and Biglytics will thrive well beyond my tenure.

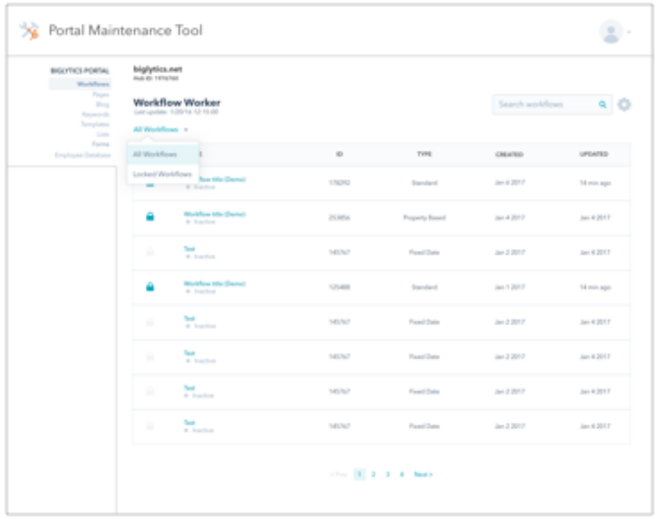
Custodian: *Portal Maintenance Tool*

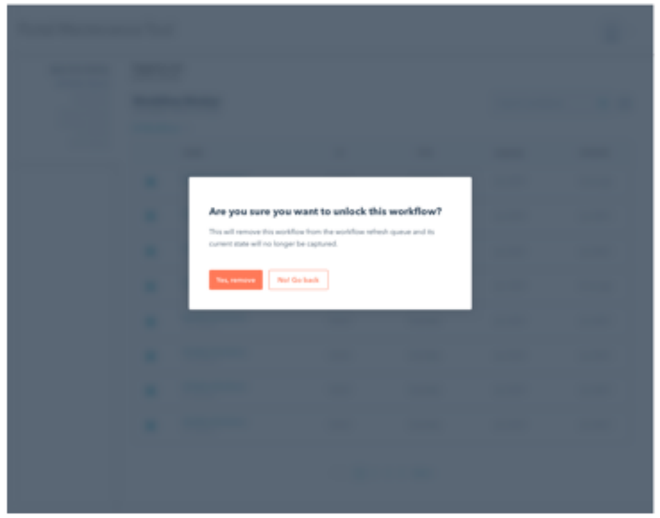
Description:

Custodian, an internal-facing application utilizing HubSpot's API endpoints, monitors demo portal(s) activity across the different HubSpot tools. The application deletes sales rep-created content after 24 hours of inactivity and reverts any changes made to 'pinned' content. 'Pinned' content refers to any material that the Sales Demo Resource Team has created within the demo portal(s) for wide-spread rep use and wants to maintain in a specific state.

Project Goal:

The goal of the application is to decrease the amount of manual effort required to maintain a clean demo environment for for the sales team as well as give the Sales Demo Resource Team confidence that any content they create for demos will be maintained.



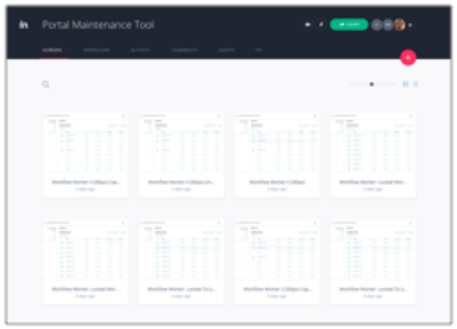


Process:

1

Our team got together to develop a problem statement and begin to sketch out a few initial ideas for the application.

2



Invision prototype of our MVP was created and tested amongst our team (end users). Iterations were made and the prototype was re-tested.

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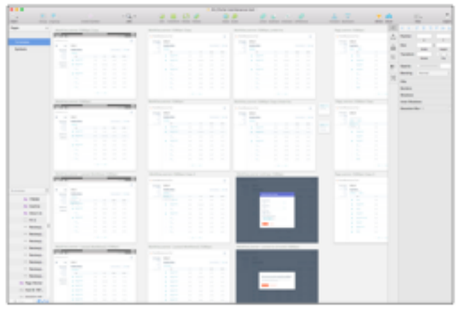

A contract developer was hired to build the application. We had several meetings with the developer to communicate our vision and continually collaborated over Slack to execute on that vision.

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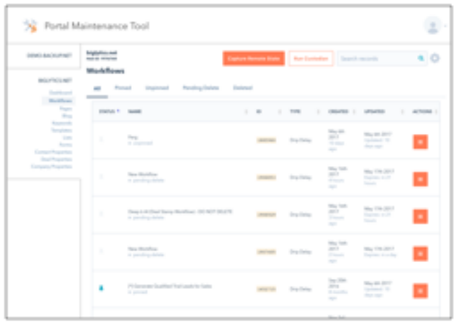

V1 of the application went live in two demo portals and worked effectively to protect team resources as well as delete dummy content produced by the sales team.

Project Review:

The application runs well and takes a large load off the Sales Demo Resource Team in regards to manual effort. However, as a HubSpot designer dabbling with the SpaceSword UI kit and trying to learn the ins and outs of collaborating with a developer, the project was a bit disappointing. Because our developer was an external contractor we were unable to build on the HubSpot stack or use HubSpot resources. In my opinion this results in a hacked-together project that does meet my design standard.

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Optimizing Sales Communication

Description:

Sales organizations are often made up of strong personalities that don't always play nice with other departments. Being a non-sales person in the sales world, I saw a lot of assumptions being made about what would be best for the sales team without ever truly understanding the sales persona at HubSpot. I challenged my team to rethink sales communication starting with truly understanding what the sales team wanted and then building a process informed by that understanding. Our first test of this revamped communication is a webinar series that communicates new product updates/features to the sales team.

Project Goal:

Our success metrics are the sales team's perceived value of our communication, goal being a value add of at least 7/10, as well as interaction with our materials (webinar attendance, email open rates, document tracking).

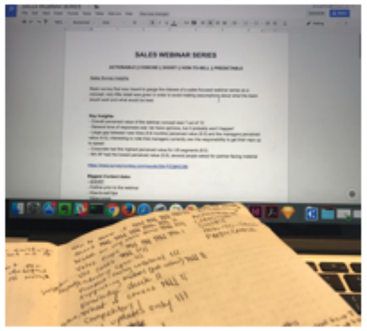
Process:

1 CONCEPT DEVELOPMENT

A survey was sent out to the sales team and sales leadership. The questions were purposely open-ended to leave lots of room for opinions and interpretation (almost killed my co-workers to not be more specific!) and the results were analyzed and a concept vision was developed.

2 PREPARATION & CONTENT DEVELOPMENT

Guided by the new concept vision, our team collaborated with marketing, product marketing, and sales managers to develop content that would be applicable to the sales team and in a framework that was easily repeatable.



3 EXECUTION

The message was delivered to the sales team via webinar by a respected 'sales voice' in the sales organization. Participation was monitored by our production team.

4 FOLLOW-UP

Post-webinar, we followed up with a recap of the content in a PDF format that doubled as alternative form of communication for reps who prefer documentation over live webinars. A recorded of the webinar was also made available for company-use.

Project Review:

In our intial webinar feedback survey, over 60% of our target audience reported a 10/10 for webinar format and a 10/10 for value add. Several sales reps applauded how well our format matched their needs. These results were tremendous and lay a great precedent for future communication.

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Exploring the Demo Black Box

Description:

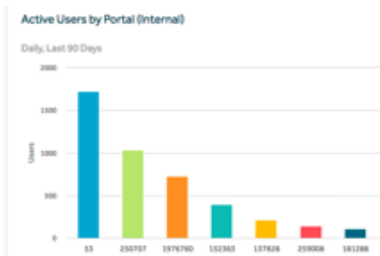
Exploring the Demo Black Box is a series of research projects intended to shed light on the HubSpot product demo as previously there has been little to no research done on how sales reps demo the HubSpot product. With a company shift to a hollistic, multi-faceted product in late 2016, it became more important to maximize the hour-long demo and provide insights into how to ideally navigate the HubSpot tool suite to best show value to prospects.

Project Goal:

The intital goal of the project was to simply understand where and how reps were demoing and use this as a base line to begin to study how reps made connections across tools and where there were opportunities to improve or build off the current demo experience.

1 Get Outta 53: Portal Usage

Providing Sales access to 53 (HubSpot's HubSpot) exposes us to multiple risks as a company. Therefore in collaboration with marketing ops, our team made a push to reduce sales access to 53 by creating a better demo enivorment in Biglytics.



2 Dissecting the Demo

This research project focused on parsing the actions that happen on sales demos. The goal was to answer questions like 'what tools get the most exposure in demos?' and 'what are common demo flows?'.

	Why Go Hubspot?	What is HubSpot?	Inbound Methodology	Case Study
Corporate				
Norseman Structures	0:00:00	0:00:00	0:00:00	0:00:00
Determine	0:03:00	0:00:00	0:00:00	0:00:00
Mid Market				
Logiq	0:06:00	0:00:00	0:00:00	0:00:00
Small Biz				
Wildbit	0:00:00	0:00:00	0:00:00	0:00:00
Scorm	0:00:00	0:00:00	0:00:00	0:14:05
Command.app	0:00:00	0:02:45	0:00:30	0:04:30
BYG Music	0:06:20	0:00:00	0:00:00	0:00:00
Brody Pro	0:00:00	0:00:00	0:04:25	0:00:00
Blend	0:00:00	0:00:00	0:00:00	0:00:00
Hackerbay	0:00:00	0:00:00	0:00:00	0:00:00
Laserax	0:00:00	0:00:00	0:00:45	0:02:55
Spotio	0:00:00	0:00:00	0:00:00	0:00:00
Ross	0:02:15	0:00:00	0:00:00	0:00:00

	53	Biglytics	727	Trial Portal
Ads	1	1		
Blog		7		3
Calendar	1			1
Call Queue	1			
Campaigns	1	1		
Companies	1			
Competitors				1
Contact Properties	2	1		
Contact Record	11			
CTA	1	2		2
CTA Analytics	1			
Dashboard	6	6		
Deals	1			
Design Manager		1		
Documents				
Email	1	7		1
Email Analytics	3	3		
Events				

3 Content Tool Usage Tracking

Since I manually deleted user content from the portal for a period of time, I tracked content creation across a group of tools over a month's sales cycle.

4 Tool Relationships

This was a deep-dive within the product to understand which tools 'talked' to each other and which did not. This began to shed light on why reps would avoid tools that could not connect to others and revealed several go-to tools for interconnectivty.

Project Review:

This project is still in its infancy and a little less guided than I would like it to be. The hope is that studying the general high-level behaviors and tendencies can begin to inform more in-depth studies of sales success metrics based on demo behavior.

Taskly: *A Project Management Applicaton*

Description:

The Taskly project was part of CareerFoundry's 8 month Intro to UX Design course. The project was meant to give a high-level overview of the UX process by including steps like user and industry research, developing a minimum viable product, sketching, wireframing and prototyping, usability testing, and visual design. Throughout the process conversations were had with a UX mentor who critqued and gave suggestions based on their own experience.

Project Goal:

As a class-long intro to user experience, the main goal of the Taskly project was to become familiar with the steps in the design process and gain apathy for specific user groups and apply that knowledge throughout an application development process.

1 Research and Information Architecture

Industry and competitor research was used to inform the creation of user personas and development of an minimum viable product (MVP). Using this research, site maps and task models were created for target personas.

2 User Flows and Wireframing

The MVP was further developed by mapping primary user flows and creating the wireframes for these flows and other key screens. Wireframes were initially drawn and then created digitally in Sketch.

3 Prototypes

Once the wireframes were complete, the screens were moved into Invision to create interactive prototypes. A series of user tests were done on the prototypes and modifications were made accordingly.

4 Visual Design

A UI kit was craated and applied to the different screens to develop the visual experience for the app. Goal was to create a light, organized feel.

Project Review:

This project was a great intro to all things UX. Going through the entire design process with continual reviews from a professional mentor resulted in a well thought out project that was informed by key user experience principles.