Plans & Drips
Research Compilation

Research Plan

Exploratory research sessions with external users

- Discovery (10-15 Participants) - Who did NOT use plans/drips
- Discovery (10-15 Participants) - Who currently use plans/drips

Formative research sessions with external users

- Initial Prototype (8-10 Participants)
- Iterative Prototypes (8-10 Participants) per iteration, at least 15 iterations total

Formative research sessions with internal users

- "Almost" final iterations of prototype
- Qualitative and quantitative feedback

Summative research sessions

- Beta testing (2 - 4 weeks)

Initial Discovery - Pain Points

- The learning curve for plans and drips kept users from adopting it
- Required time investment for said learning curve also not tenable
- Build-up/countdown is confusing, even with training
- Searching for a particular template is tedious
- Prefer to copy from template versus build from scratch
- Difficult to identify the general outline of any given plan or drip

Global Simplicity

- Combined the concept of drips and plans into one interface
- Created a wizard format for creating templates
- Presented options and content incrementally to minimize cognitive load
- Combined the concept of To Do's and Reminders
- Settings moved to the end of the setup process
- Easier to understand options for settings

Search Page

- Clearer organization of templates
- Easy filtering and color-coded categories
- Card view and previews for at-a-glance information
- Emphasized process for editing templates vs creating new ones

Template Types

Provided template types based on user scenarios
- Sequence Campaign
- Calendar (Date Based) Campaign
- Checklist

Blank Template	**Blank Checklist Temp...**	**Blank Calendar Templ...**
🔒 ◯	🔒 ◯	🔒 ◯
0 DAY CAMPAIGN	0 CHECKLIST ITEM	0 CALENDAR ITEM
CINC	CINC	CINC
0 Reminders **0** Emails **0** Texts		**0** Reminders **0** Emails **0** Texts
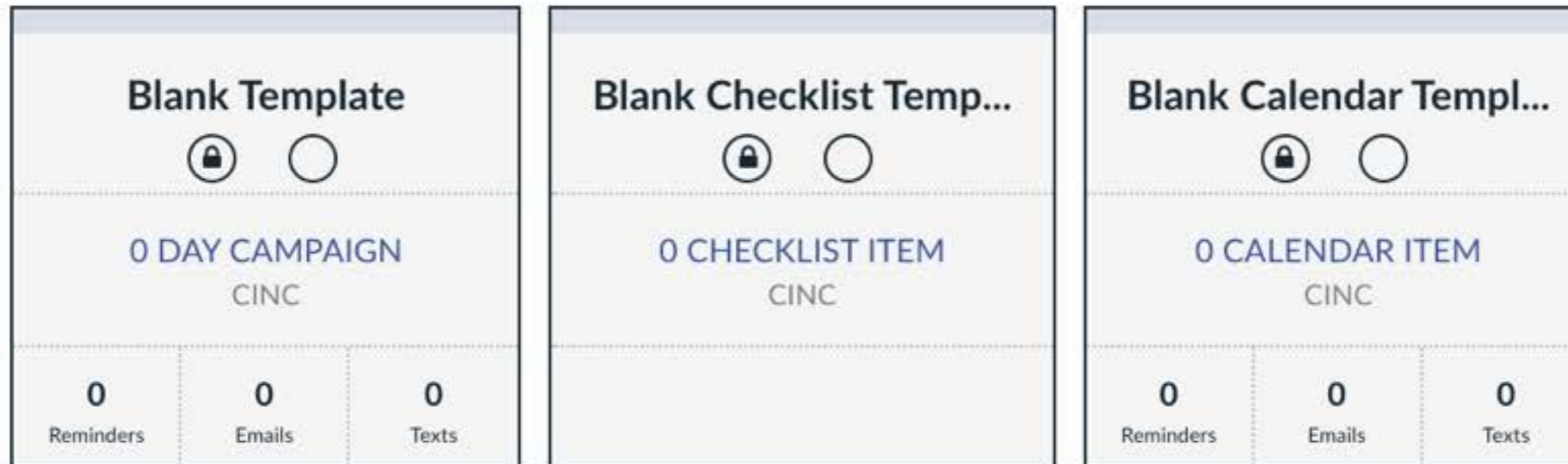
Checklist

- Ability to create checklists
- Created a "due in X days/weeks" instead of "due on"
- Simplified reordering

Checklist - 2 Items		
I am the first item on this checklist Yay	Woot	Due in 4 Days
I am the second item on this checklist Hooray	Aw yeah	Due in 5 Days
	ADD CHECKLIST ITEM	

Sequence AutoTracks

- Presented steps in a day format to quickly grasp scope of AutoTrack
- Simplified approach to editing/deleting steps
- Organized step row to outline relevant details
- Easy way to add and reorder steps
- Easy way to add and rename days
- Adjustable lead types

Day 1 ▼
Edit Day
Add Step
Remove Day

EMAIL

1. Select Lead Type
☐ Everyone
☑ Buyer
☑ Seller
☑ Buyer & Seller
☐ Recruit

Day 1 ▼

| TEXT | ✎ Send immediately after AutoTrack is applied | Text: Hi [FIRSTNAME], thanks for reaching out. Just curious, are you only looking in [F... |
| EMAIL | ✎ Send 10 minutes after previous step is completed | Subject: Properties in [FAVORITE CITY] |

Day 2 ▼

| TEXT | ✎ Send at 8:30 AM | Text: Hey [FIRSTNAME], did you get the listings I sent over to you recently? May have ... |
| EMAIL | ✎ Send at 10:00 AM | Subject: What did you think of the listings? |

Day 4 ▼

| TEXT | ✎ Send at 8:00 AM | Text: Hi [FIRSTNAME], Just wondering... Did I drop the ball? I haven't heard back from ... |

⊕ ADD STEP

⊕ ADD NEW DAY

Scheduling Options

- Ability to create contingencies among reminders (blocking reminders)
- Ability to trigger "next" task based on whether the previous task was completed
- Option to send communications at a specific time, or specified timeframe

Set as a blocking reminder

Set Schedule

✓ Send after Previous Step is Completed

	Hours	Minutes	
Send message	00	: 10	after the previous step is completed.

Set Schedule

○ Send after Previous Step is Completed

✓ **Send at Specific Time**

Set Specific Time

10 : 00

AM | PM

TEXT — Send immediately after AutoTrack is applied

EMAIL — Send 10 minutes after previous step is completed

Scheduling Options (cont'd)

- Clear validation to indicate conflicts in scheduled communication
- Option to exclude communication on weekends and holidays
- Adjustable communication windows

Calendar AutoTracks

- Option to create holiday based campaigns
- Option to send communication "x" days before or after a given holiday
- Ability to create holiday campaigns based on year
- US and Canadian holidays available
- Ability to select lead type
- Able to add custom dates

1. Select Lead Type
- ☐ Everyone
- ☑ Buyer
- ☑ Seller
- ☑ Buyer & Seller
- ☐ Recruit

Set Specific Time:

`07` : `00`

AM   PM

Send `00` day(s) ✓ before the selected day.
after

CINC - Holidays
🔓 ◯

12 CALENDAR ITEMS
CINC

0	12	0
Reminders	Emails	Texts

CINC - Canada Holida...
🔓 ◯

14 CALENDAR ITEMS
CINC

0	14	0
Reminders	Emails	Texts

Custom Dates or Fields

Choose Date

Custom Field ⌄

Settings

- Appended to the end of the workflow instead of the beginning
- Clearer presentation of start and stop triggers
- Ability to restart current AutoTrack or daisy-chain others
- Simplified method of editing permissions for other agents

Review AutoTrack

- AutoTrack content preview
- Outlines applied settings
- Preview of all steps in the AutoTrack

Saved Successfully

Publish This AutoTrack

Exit Wizard | Make Another AutoTrack

I'm the best test.
● General

1	2	0	0
DAY CAMPAIGN	REMINDERS	EMAILS	TEXTS

- You set **everyone** as your lead type and communication will occur from **8am - 5pm, Monday - Sunday**.

- Your **START** triggers are:
  - When the label **Buyer Nurture** is applied
  - When the **Lead pipeline** is set to **Contacted**

- Your **STOP** trigger is:
  - When the **lead replies** to a communication

- This AutoTrack template is **editable by 0 team members** and **private** to other team members.

Day 1

REMINDER	Send immediately after AutoTrack is applied	Remind Buyer's Agent : yeah
REMINDER	Send 36 minutes after previous step is completed	Remind Buyer's Agent : dsfasdfsd

Overview Page

- At-a-glance callouts to indicate total, active and paused AutoTracks
- Card views with high-level details of AutoTracks: Status, Leads, Touches and Steps
- Ability to drill down and access list of leads applied to a given AutoTrack
- Functionality to change status of an AutoTrack, depending on permission levels
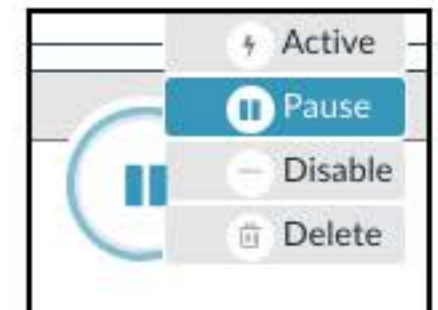- Filtering options by category

Lead Details Page

- Presentation of AutoTrack mimics the design on the template builder
- Collapsed View (Header) - High level details (Name, status, progress bar, applied date)
- Expanded View - Presents contents of the AutoTrack with limited editable areas
- Each step details the scheduling information, assigned to, previews and timestamps
- AutoTracks tab to separate existing campaign with new ones
- Use of iconography to indicate the status of any given step

That's it!
Launch MVP
...and commence summative testing :)