Sales Dashboard Study

Google LLC | October 2022

Study Overview

Project Motivation

- The UX team was tasked with supporting the revamp/re-launch of the sales compensation reporting experience for Google Cloud sellers. Survey data over the past 2 years showed clear signals that sellers were dissatisfied with the compensation dashboard, but the product team had yet to speak to any users face-to-face to clarify key pain points.

Objective

- Gain a deeper understanding of the needs, motivations, and pain points of sales compensation dashboard users within Google Cloud

- Consider opportunities for a new compensation dashboard experience (new UI)

Stakeholders: UX Design, Product Manager, SW Engineering, Business Analyst
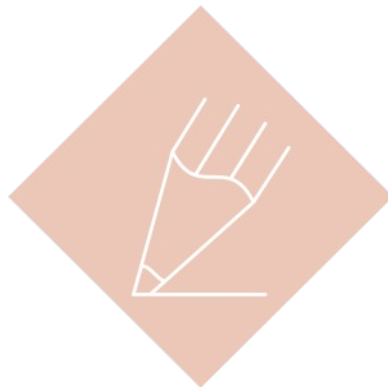
Discover Issue

I utilized the **Double Diamond** framework. This was a **foundational study** in the discovery phase, used to help the product team understand key user problems.

1. Discover Issue   2. Define Issue   3. Develop Solution   4. Deliver Solution

Approach

- **Method**: 60 minute contextual inquiry with internal participants on the Google Cloud sales team

- **Participants**: N=13 Sales users
  - 6 Field Sales Reps (FSR)
  - 5 Customer Engineers (CE)
  - 1 Partner Development Manager (PDM)*
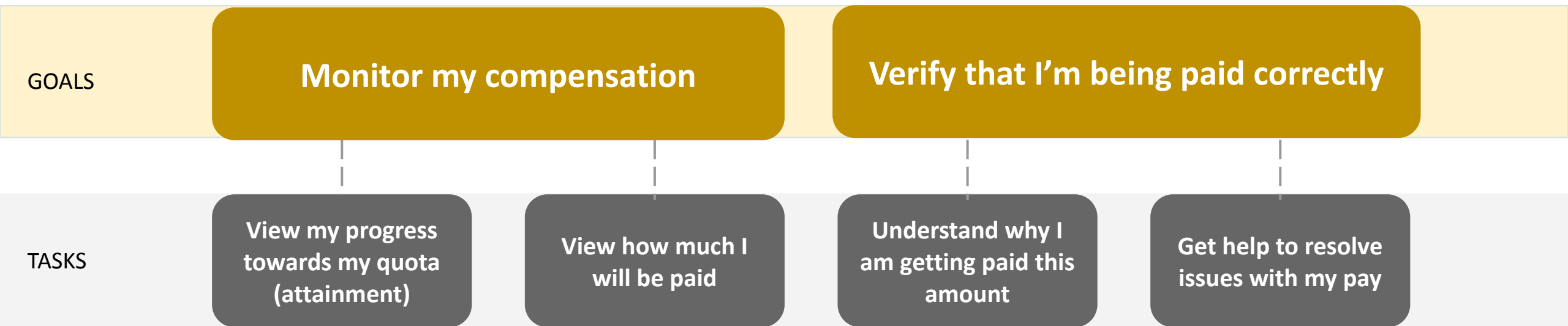 - 1 Sales Specialist*

Low representation due to participant cancellations. Future research to dive deeper into the needs of these roles.

Critical User Journeys

This study identified the following critical user journeys:

As a Google Cloud employee who receives a sales bonus (FSR, CE, Sales Specialist, PDM), I want to…

GOALS	Monitor my compensation	Verify that I'm being paid correctly

TASKS	View my progress towards my quota (attainment)	View how much I will be paid	Understand why I am getting paid this amount	Get help to resolve issues with my pay

Pain Points

Tasks involving the current sales dashboard	Supported?
View my progress towards my quota (attainment)	**Partially**
View how much I will be paid	**Partially**
Understand why I am getting paid this amount	**No**

Pain Points

Tasks involving the current dashboard	Supported?
View how much I will be paid	**Partially**

While the overall payout number is available in the existing compensation experience, a couple of participants were **unaware that a payout dashboard existed,** since the landing page defaults to an attainment (progress towards quota) dashboard. They must use a dropdown (with limited discoverability) to navigate to the payout dashboard.

> "Many people at the beginning of this year, didn't realize there were two dashboards. They thought that they were having to calculate their payments themselves"
> -Customer Engineer

Pain Points

Tasks involving the current dashboard	Supported?
View my progress towards my quota (attainment)	**Partially**
Understand why I am getting paid this amount	**No**

Participants expressed desire to see additional details for attainment
While high-level attainment values are discoverable, many participants shared that they couldn't see attainment at the level of detail desired. This impacted their ability to understand their pay, which involves drilling down into a detailed breakdown to see which deals have been accounted for.

"[Current tool] has the total amount of attainment but limited details on what contributes to that total amount.. If a deal misses, finding out why it misses is complicated" -Partner Development Manager

Pain Points

Tasks involving the current dashboard	Supported?
Understand why I am getting paid this amount	**No**

Limited visibility into 'Data Freshness'
Participants were unclear about whether the current experience made an error in calculating pay or simply needed time to provide updated data.

"[Current experience is] missing a date for data freshness..So if I go to compare this number to another system that we're using, there's the chance for the numbers to be out of sync based upon when the data was last refreshed..I don't have visibility into that" -Customer Engineer

Pain Points

Tasks involving the current dashboard	Supported?
Understand why I am getting paid this amount	**No**

Participants felt that they were missing key historical data needed to understand payout.
This typically involved getting a closer look into why retroactive changes were applied to an account.

"One time I came in and my payment changed and there was no 'why'..I raised a ticket..it was hard to understand why this happened..I didn't know where to go and it was up to me to figure out why...then I had to go to reports for the source of truth because the dashboard was not correct" **-Customer Engineer**

Pain Points

Tasks involving the current dashboard	Supported?
Understand why I am getting paid this amount	**No**

Data needed for validation is dispersed across multiple tools
Most participants cross-checked the existing data with other Cloud sales tools, which was time-consuming and involved going back and forth to validate payout. Cross-checking is complicated because the different tools provide different levels of detail. There is often a mismatch between the data provided by these tools which contributes to lack of trust.

"I go to [Tool#1] to cross check the information at [the sales compensation tool]..this is more involved if I want to get into individual products.. At [Tool#1] I go to Account lookup which has more granular numbers..at [sales compensation tool] it's a carved up number" - Sales Specialist

Opportunities

Pain Points 🚧

Limited discoverability for payment dashboard

Missing key details behind dashboard calculations & data freshness

Data needed to understand pay is dispersed across several tools

Opportunities 💡

Update layout to increase visibility of payout data

Provide more details for dashboard values

Create a 1 stop shop for attainment and payout data

Key Takeaways

KEY TASKS

Cloud sales users expect to be able to view attainment, view payout, and understand payout in their compensation dashboard.

PAIN POINTS

The following pain points reduce user ability to complete key tasks: **limited discoverability for payment dashboard**, **missing details** behind payment and attainment calculations, important **data dispersed across several tools**.

OPPORTUNITIES

Show component and payout details on one dashboard that leads with high-level summaries and provides users **with the flexibility to drill into the details** they care about. Link this dashboard to other relevant tools to increase user understanding and trust of the data.

FUTURE WORK

Use foundational findings to develop design concepts and follow-up with design research; Conduct future research to learn more about the experience of Sales Specialists and Partner Development Managers.