Pipelines Project Proposal

Problem: Contact Pipelines and Lead Reports have areas that could be improved to allow for greater usability, scalability of data, accurate reporting of data, and easy access to that data. The big takeaways from my interviews with stakeholders can be summarized in 5 questions:

1. *How might we show specific touchpoints as far as where a lead came from?*
2. *How might we make segmentation more robust in contacts and mirror what they have from leads?*
3. *How might we improve the UX/UI of the Pipelines Page for easier use?*
4. *How might we track lead times?*
5. *How might we make large amounts of data more scalable and easier to manage?*

Because of these impediments, many features are being underutilized (example: creating lead time reports), data is misinterpreted (example: conversion percentages in the pipeline stages), important data is missing (example: lead time), data visualization is hard to interpret (example: lead reports) and large amounts of data become quickly hard to handle.

By addressing these issues, clients will have more control and confidence in their data and be able to easily track the progress of their contacts in the pipeline.

Stakeholders: *[Redacted]*

User Story: As a staff member for school admissions I want to obtain key pipeline metrics so that I can determine the performance of my campaigns without needing the help of Akero staff.

Examples:

As-is Scenario: Client views Pipeline, They cannot find average time in pipeline, Conversion rates do not line up with expectations, They cannot find common overall conversion rate metrics (like Inquiry to Admit Conv. and Inquiry to Enrolled Conv.).

Client tries to make a report, They have a hard time finding the button to do so if they are a new user, They cannot segment data in lead time reports, Charts are difficult to read, Table is long and hard to understand, Won/lost is not as specific as they'd like, They cannot easily find a way to download their data, print their chart, or find help.

Ideal Scenario: Client views Pipeline, They can quickly find key metrics like the average time in each pipeline stage and conversion rates, They can customize their conversion rates to take ownership of their data.

Client tries to make a report, They can create a new report quickly, Charts are easy to read and customizable, data can be segmented for scalability, Pipelines are automatically labled in the charts, Key metrics like Mean and Median for contacts in a

pipeline are automatically calculated, Help, print, and download are in intuitive places in the UI.

Suggested Solutions: See numbered labels on Pipeline Mockup.

1. ~~(Optional) Chat Box: Shows only some of the time. Not something to focus on now, but I'll add this to the backlog.~~
2. ~~*Segments Button: [Removed – already in progress on another backlog item. No need to worry about this one]*~~

Contacts Pipeline Dashboard

3. Overall Inquiry to Admit Rate: What is the percentage of accepted students/total inquiries?
4. Pipeline Stage Banner: Various changes
    a. Add average time in each stage. Calculate total time a contact is in each stage, add all of them together, and divide by the total number of contacts in that stage.
    b. Reformat calculations (See Excel Sheet and Suggested Solution #5)
5. Edit Pipeline: Add Custom Pipeline Conversion
    a. Is it possible to allow clients to adjust the pipeline conversion rate based on the custom stages they make?
    b. Dropdown menus include a list of the pipelines they have uploaded as well as mathematical operators. If an operator is selected, another dropdown menu will appear so that the client can creat their own conversion formulas. They can do this indefinitely.

Engagement Reports

6. Create Report Button: We can keep the plus sign at the bottom of this page but it's not being used very much. I suggest we add a Create Report button at the top of the page to see if we get more hits on this feature.
    a. (Optional) 6a: We may want to reword these. Not something for dev to worry about currently but I wanted to put it on the radar.
7. Add Segments to Lead Time Report: Will help with scalability of the data if we can filter the reports by specific segments.

Lead Time Report

8. Line Graph: A line graph allows us to superimpose data on top of each other. In addition when combined with #10, we can click stages to add or remove them from the graph for readability. This output will change depending on the segments a user would choose in #7, allowing for scalability of data.
9. Download CSV/ Print chart: Before, this information (along with the help tab which I will cover in #11) was hidden in a banner which would only appear if people moved their mouse to the top of the page.
10. Updated pipeline banner: Before, we had "Won and Lost". This banner imports the pipeline names to the graph and each stage maintains the current functionality we have of being toggled on and off.

    a. 10a: The table hear is updated with the pipeline data and includes mean and median time in each stage in the pipeline. This output will change depending on the segments a user would choose in #7, allowing for scalability of data.
11. Help button: The help/chat button is moved from the hidden banner off to the side of the page for easier access.

Key Deliverables:

- Engineering, please fill this out depending on what of the above suggested solutions are feasible. In order of impact from highest to lowest:
    - 3, 4, 5
    - 7, 8, 9, 10
    - 6, 11
    - Optional items.