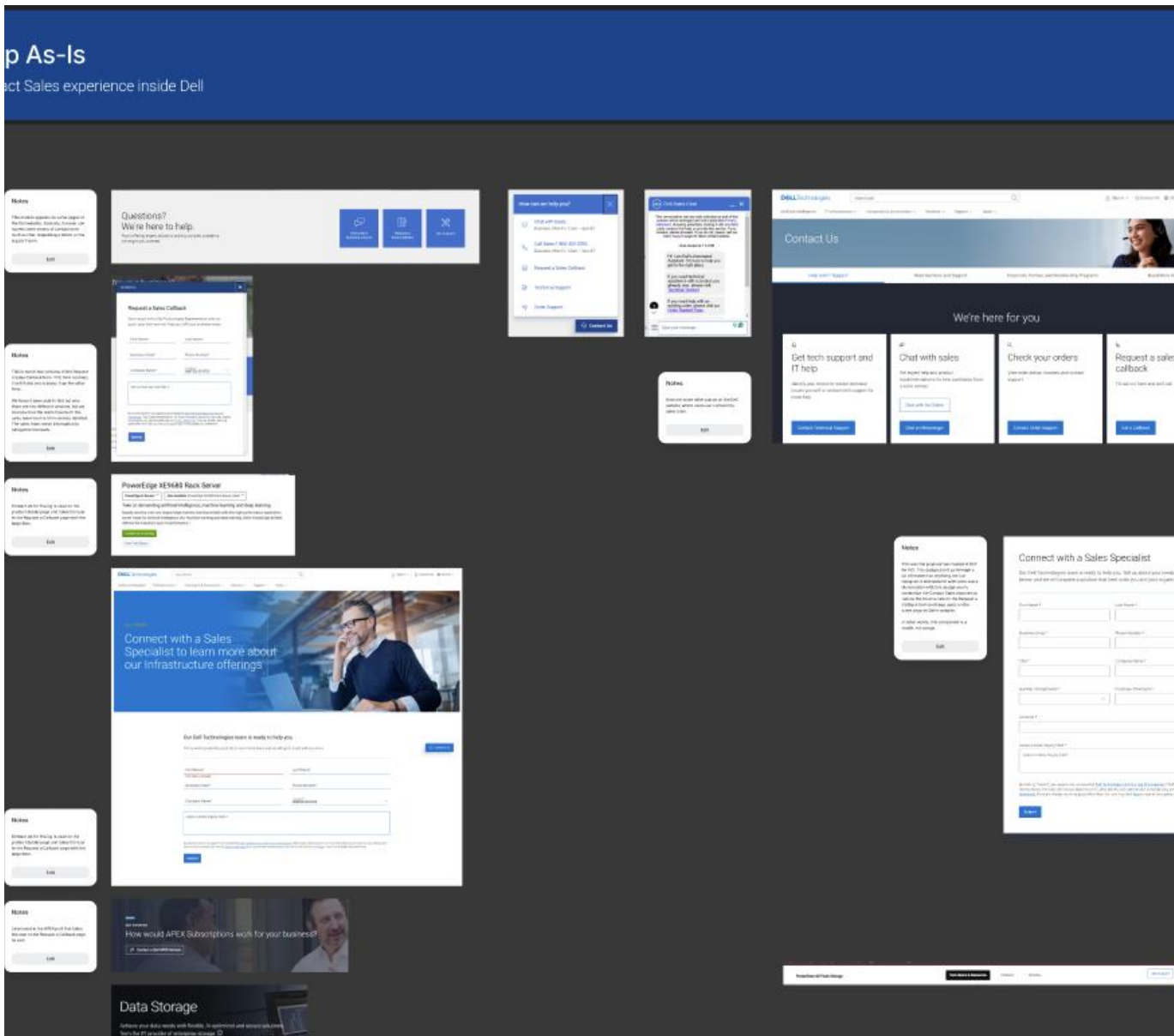


Project 03 • Dell

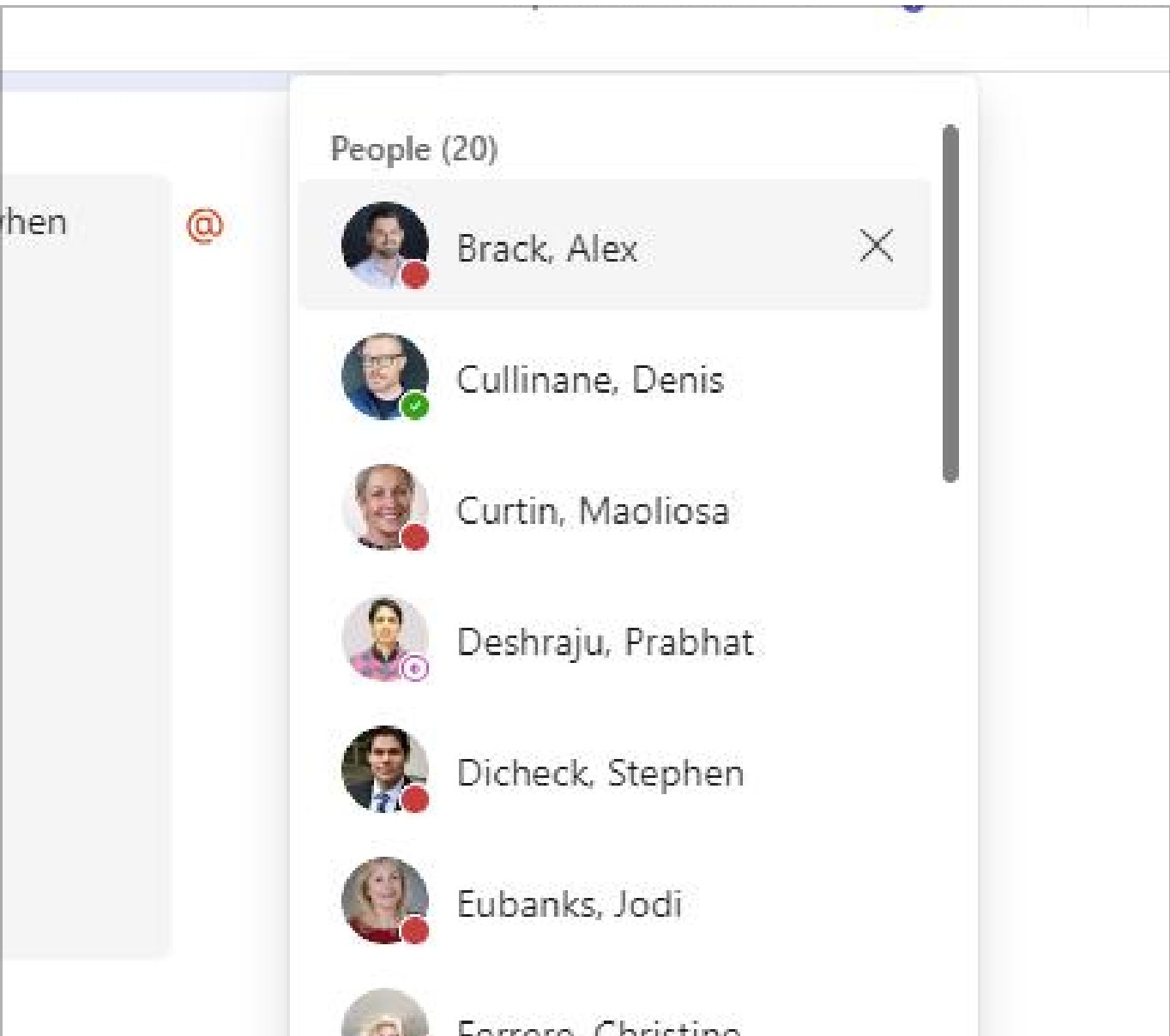
Contact Sales Experience

Discovery and Framing of the experience of contacting the Dell sales team to buy ISG products.

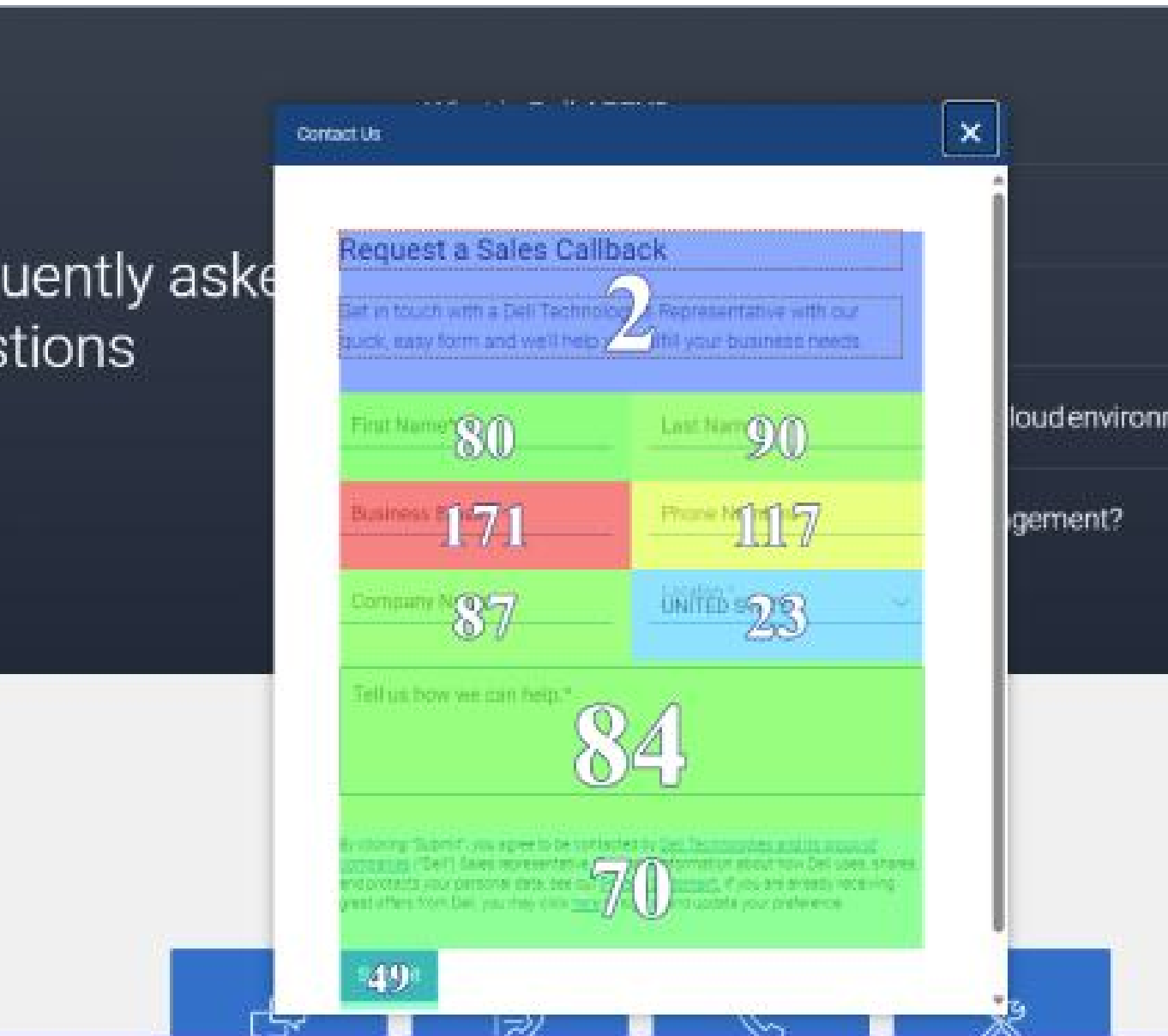
Discovery phase



Analyzed all the Contact Sales experiences at ISG



Talked to many stakeholders

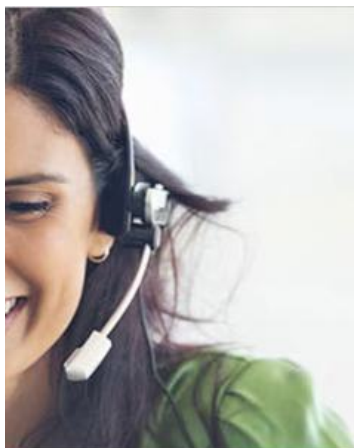


Metrics in Content Square

Problems statements

Business	Data & Technical	Design & Content
Low conversion rate on callback request forms (less than 15%).	Inability to track the origin of leads generated in each ISG journey.	Inconsistencies in the ISG contact sales experience due to the existence of multiple forms.
High bounce rate due to the size of the forms and mandatory fields.	Lack of data on the impact of ISG chat on lead/pipeline generation.	Need to modernize the look of the form to improve the customer experience.
Need to improve the quality of leads received by the sales team.	Non-sales-related submissions (~95%) diluting the SLA experience and consistency.	Define a standard for labels and CTAs in the contact sales journey.
Lack of initiatives focused exclusively on the contact sales experience in ISG.	There is no SLA (guaranteed response time) published on the forms due to the differences in the routing rules (RR4 and RR6).	Need to resolve inconsistencies among the various paths in ISG contact sales.
Need to increase the contact rate with the sales team.	Need to reduce the number of forms from 3 to 1.	Current form does not follow UX best practices

Our Goals



Solicitar o Contato de Especialista em Vendas

A nossa equipa Dell Technologies está aqui para ajudar

Fale-nos das suas necessidades no formulário abaixo e iremos preparar a solução mais adequada para si e para a sua organização.

Nome*	Sobrenome*
E-mail comercial*	Número de telefone*
Cargo	Nome da empresa*
Número de funcionários*	Período da compra
Local * RDACII	

Modernization and Standardization

Define a standard for labels and CTAs in the Contact Sales journey and modernize the form's appearance.

11,262

Employees

18,042

▼

Company Name

Purchase Timeframe

2,833

▼

Inquiry here.*

22,512

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Impact business metrics

Increase the contact rate with the sales team, improve the quality of the leads, reduce the bounce rate on the callback page and increase the percentage of clicks on the send button.

16 submissions, routed to the Online Concierge

Form Submissions and Lead Quality:

Approx. 5% of total sales callback form submissions are for non-sales related inquiries such as tech support, order support, or payment issues. There is an opportunity to both increase the submission rate and improve lead quality by routing CSB vs Commercial:

Lack of data on the lead/pipeline generation impacts the ability to track CSB reps.

It's a named account CSB reps provide visitors with a callback number, resulting in lost tracking.

Resolve technical and data limitations

Reduce the number of forms from 3 to 1, identify the source URL of leads and work with the data team to track metrics more easily.

Ideation Phase

Did a research into good UX practices for forms

As a result, I noticed several usability problems with the current form that needed to be corrected. Some examples:

- Opt for a 1-column form instead of a multi-column form
- Depending on the size, prioritize multi-steps in the form
- Group questions to make them easier to fill in
- Present progress indicators
- Use clear CTAs
- Feedback upon submission

Our Dell Technologies team is ready to help you

Tell us about your needs in the form below, and we will prepare a solution th organization.

First Name*

Last Name*

Business Email*

Phone Number*

Job Title

Company Name*

Number of Employees*

▼

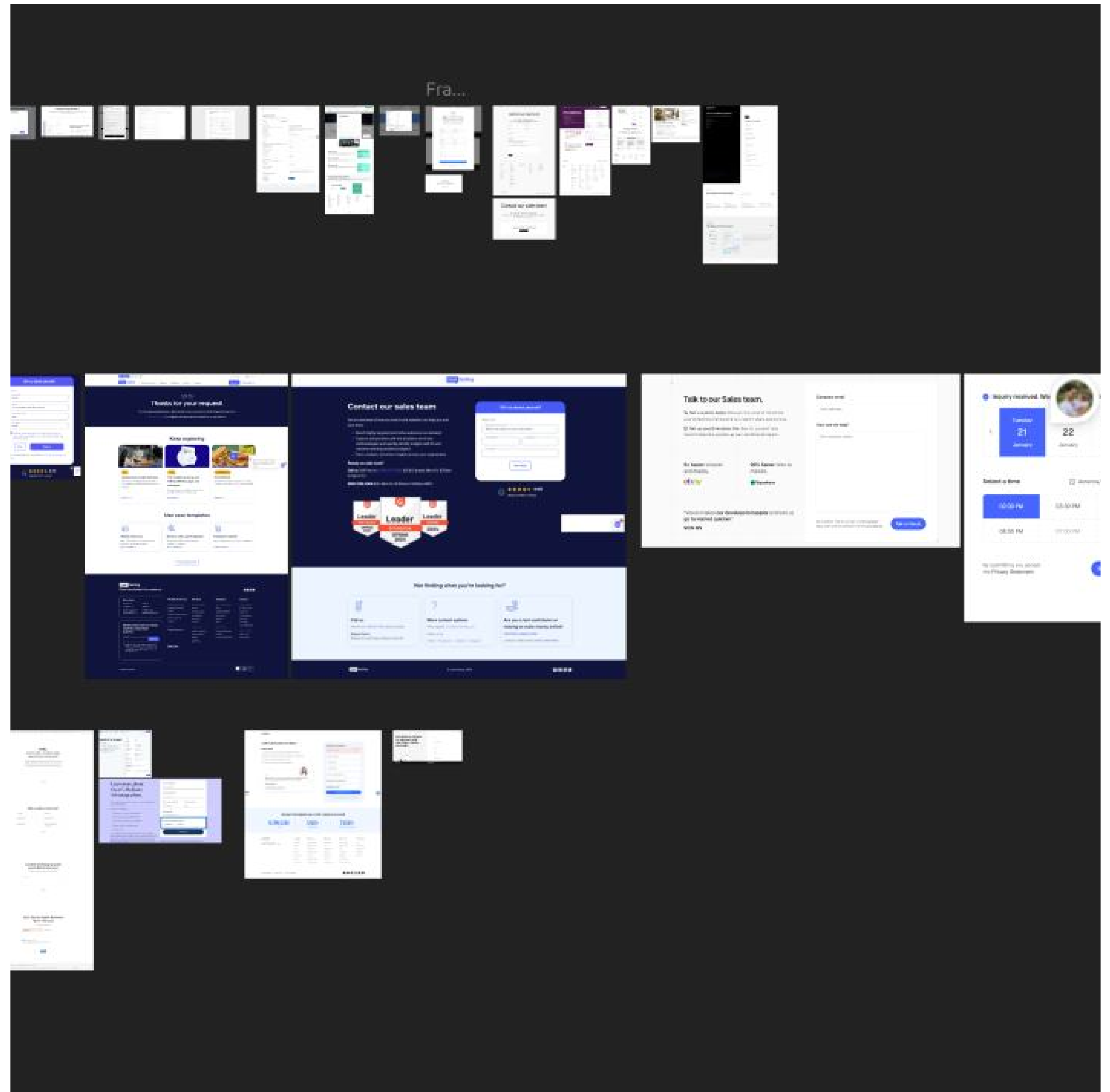
Purchase Timefram

Location *

UNITED STATES

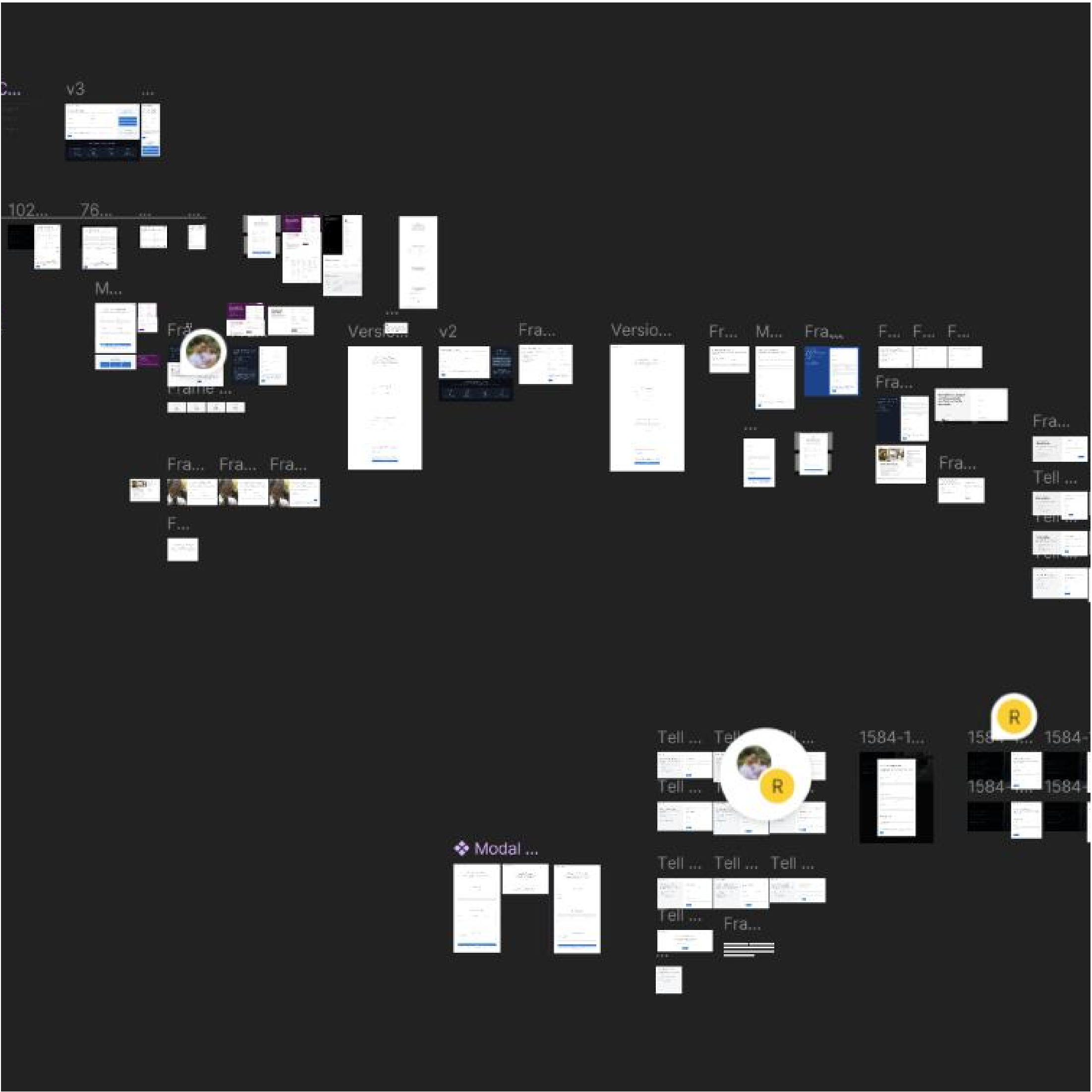
Research into visual references in companies from different industries

Before starting the ideation, I researched numerous websites to understand the patterns in the contact sales pages and forms on other sites.



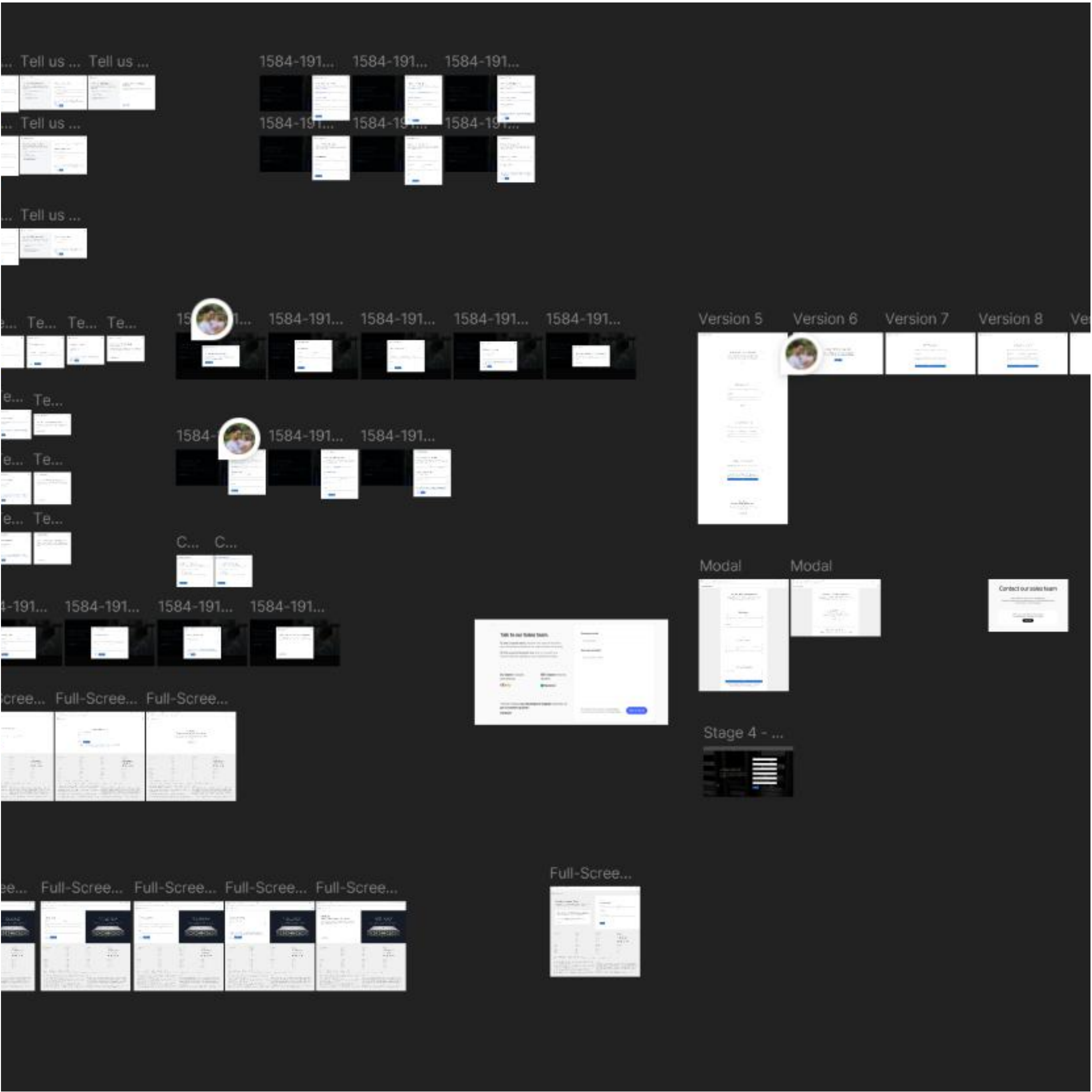
More than 15 designed versions

I tested different visual concepts and components to find the best design solutions for the contact sales journey.



After more than 3 weeks designing and researching, I chose the 3 best versions

Three different concepts: Simple Modal with Multi-Step; Full-Screen Modal with Multi-Step; Full-Screen Modal with Scroll.



Hyperconverged Infrastructure



Connect with a Sales Specialist

Our Dell Technologies team is ready to help you. Click in **Get Started** to tell us about your needs in the form, and we will prepare a solution that best suits you and your organization. For technical questions, [contact the support team](#).

Get started →

Hyperconverged Infrastructure



Tell us about yourself.

First Name

Last Name

Business Email

Phone Number

Continue →

Version 1
Simple Modal with Multi-Step



Connect with a Sales Specialist

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- ✓ Get help from Dell experts to choose the best products
- ✓ Get price information
- ✓ Explore use cases for your team

 For technical questions and product queries, [please contact the support team.](#)

Tell us about yourself.



First Name

Last Name

Business Email

Phone Number

Continue →

Version 2
Full-Screen Modal
with Multi-Step



Connect with a Sales Specialist

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Tell us about yourself.

First Name

Last Name

Business Email

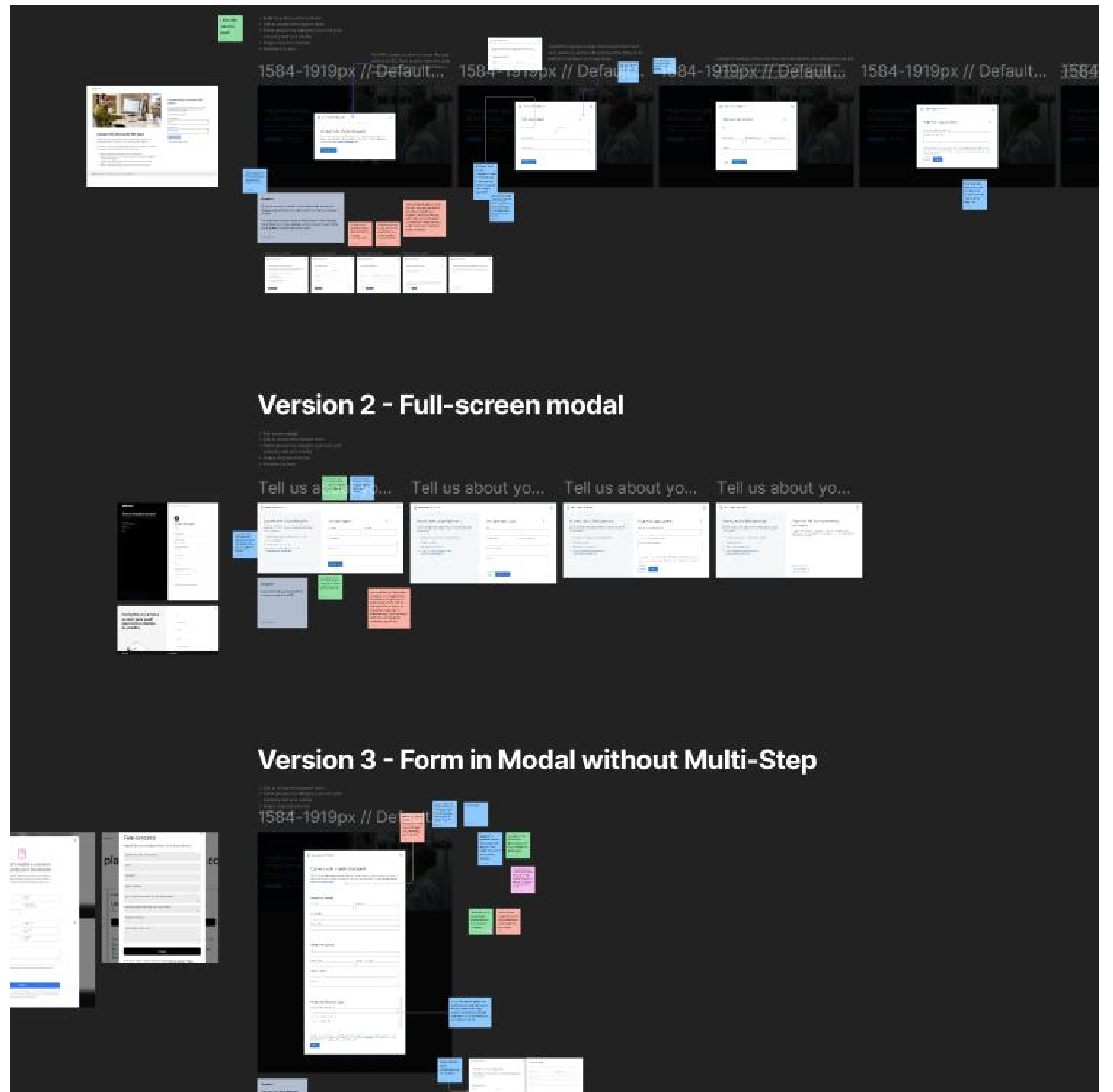
Phone Number

Tell us about company.

Version 3
Full-Screen Modal
with Scroll

Lots of nice feedback on the design review

After that, I began to refine each version based on the feedback and other visual references I had researched.



Testing Phase

Some things we wanted to find out

Multi-Step vs One-Step with Scroll

Do users prefer to fill in a form in small steps or all at once by scrolling?

Simples Modal vs Full-Screen Modal

Do users prefer a generic modal or a modal that covers the whole page?

Link to the support team

How can you facilitate access to the support team?

We tested the 3 versions with 24 people from different audiences (SB, MB and Enterprise)

We carried out concept tests and compared the three versions to understand how each person interacted with the designs.

- Servers, Storage, Networking

ers
dom, Canada, Australia | Employed full-time (30 or more hours per week) | English | C

AB

Lucas013

★★★★★

Add to favorites

27 – Male – \$40,000 - \$59,999 – United States

0 notes 0 clips

Summarize this session

BA

Pluto90

★★★★★

Add to favorites

35 – Male – \$100,000 - \$124,999 – Canada

0 notes 0 clips

Summarize this session

AB

SurveyKing37

★★★★★

Add to favorites

42 – Male – \$150,000 - \$174,999 – United States

0 notes 0 clips

replaced 5460859C

BA

Multi-Step vs One-Step with Scroll

10 out of 12 participants said they preferred the multi-step version to the scroll version

“I like this prototype better than the first. I like how **everything is on one screen page and I didn't have to scroll.**”

[Link to watch](#) 

“**Liked the fact there is no scrolling** when filling out the form”

[Link to watch](#) 

“**Too much scrolling**, much prefer everything to be on one page without the scrolling”

[Link to watch](#) 

“**I disliked the scrolling feature.** All of the data that needs to be gathered could have been condensed onto a form, similar to the first prototype.”

[Link to watch](#)

“**I don't like scrolling down to fill out all the information.** I was a bit of a pain to do.”

[Link to watch](#)

“Did not like the UI, **had to scroll down within the same page do go to next section.** Lot of white space. All the 3 steps/sections could have been combined.”

[Link to watch](#)

Full-Screen Modal vs Pop-Up

10 out of 12 participants prefer a full-screen modal to a pop-up modal

Believes that the fuller screen allows for the inclusion of more information, which is not possible in a smaller popup screen, specifically mentioning the addition of testimonials.

[Link to watch](#) 

“I like pop-up modals in general because they don't interrupt your browsing flow, but in this context I preferred the first version, **where the info stayed constant on the left.**”

[Link to watch](#) 

Prefers option two over option one due to a reduced number of clicks required to proceed, indicating a more streamlined user experience.

[Link to watch](#) 

“**Short, and to the point form.** Just the right amount of info being collected, I don't feel that I'm having to enter too much info.”

[Link to watch](#) 

Prefers the second version of the form because it allows for quicker information entry with the form filled out on the right side, enhancing usability.

[Link to watch](#) 

“**It feels like the information on the screen has a better balance** - i.e. the market information in the grey box does not feel out of place using this layout”

[Link to watch](#) 

Details & Refinements

1



Hyperconverged Infrastructure



2

Contact our Sales Team

3

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Dell Technologies customers derive **significant value** from using Dell PowerFlex to support their IT and business operations. IDC calculates that these benefits generate an **average annual value** of US\$7.24 million per company, which would result in a **three-year ROI** of 276%.

[Download the white paper](#)

"Dell PowerFlex helped us accelerate optimization in several business areas with an IT infrastructure that supports future innovations and scalability."



1 of 2

5

1 of 2

Tell us about yourself.

First name *

Last name *

Job title *

Organization email address *

Phone number *

Continue

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1 of 2

2 of 2

Tell us about your organization.

Organization name *

Number of employees *

Purchase timeframe *

Location *

Message (optional)

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[Back](#)

[Send Request](#)



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9

Thank you! We received your request.

Our sales team will contact you by email or phone in [\[expected time, e.g., 2 business days\]](#). In the meantime, we invite you to explore other Dell products and solutions.

10

Close