



DHP CUSTOMER INTERVIEWS

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CDW.COM

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TESTING OVERVIEW + RESEARCH GOALS

Goals

Validate usage and behavior for the new Dragon homepage experience.

1. Prioritize improvements and features for DHP
2. Determine friction and pain points with the new experience including navigation

Approach

Testing consisted of 9 remote video interviews using CAB research participants across different segments and roles.

Users were asked about general feedback and overall reception of the DHP and individual widgets.

- Current account center access frequency, and activities
- Combination of Task Analysis and Usability questions were used.
- Action Items, Orders, Quotes, IT Assets, Navigation were all specifically discussed



KEY INSIGHTS

Action Items

- Automation
- See more and do more on this page

Orders

- Tracking, statuses and invoicing
- Prefer to stay on this page

Quotes

- In communication with AM
- Usually familiar with quote

IT Assets

- Some confusion
- Hardware Ad

Personalization

- Reorder widgets
- Resize widgets/Resize info

General

- Happy with look and feel
- Mixed density feedback

“

If I'm already looking at it [orders] why can't I just look at the rest?

”



Detailed Findings

ACTION ITEMS WIDGET



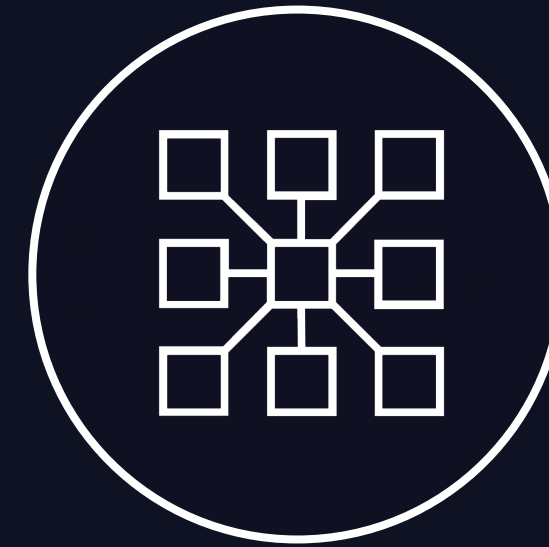
Automation

- All users expected cards to automatically move after action
- Also, that it would be closer to a one click experience vs deep linking.



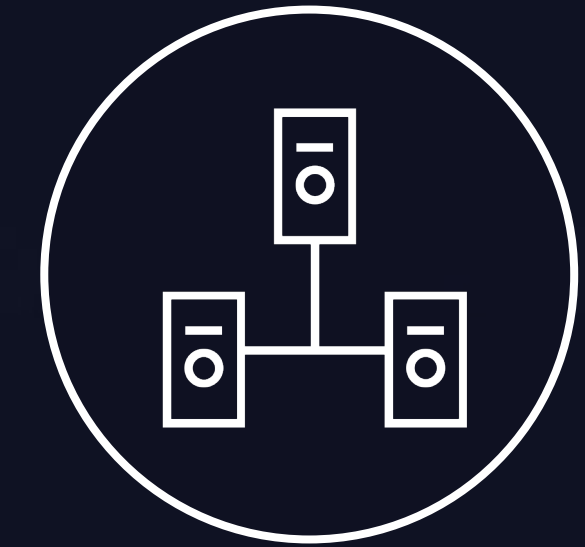
Stay on page

- Users wanted more info
- More dense or larger widget



New action items

- Start a return
- Renewals
- Share a task with others



Manual marking

- Most users were easily and quickly able to mark items complete manually
- Some did think that it was similar to the CTA. Not only moving it to different file bin

PERSONALIZATION



MINIMIZE

- Accordion treatment was well received



Reorder

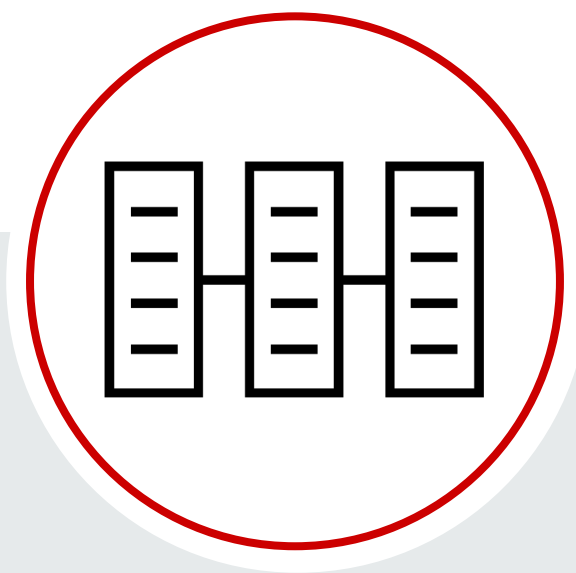
- Users would like to reorder widgets to better suit their needs



Resize

- Resize widgets
- Change density of info in widgets

ORDERS WIDGET



Order Management

- Tracking
- Statuses
- Invoices
- Cancel
- Edit
- Share



Sorting & Filtering

- Change time period
- Previously ordered products
- Filter in widget



Stay on page

- Do more within this widget on this page



Difficulty

- Wasn't immediately clear
- Infographics
- Confusion between sections

QUOTES WIDGET



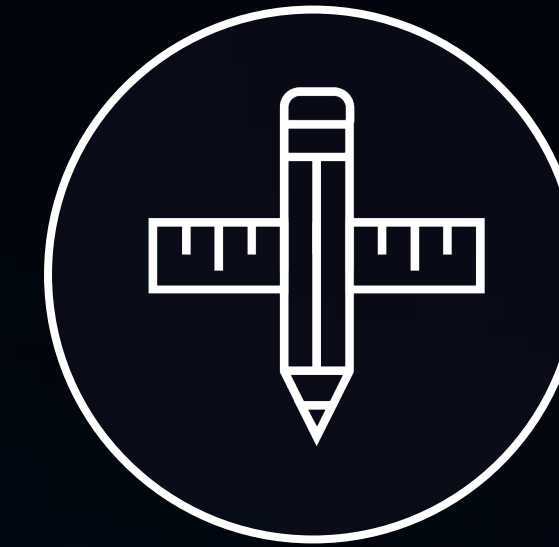
Account Manager

- Usually in communication with AM
- Familiar with active quote



Quotes Management

- Stock status
- Edit
- Share
- Quote expiry



Imagery

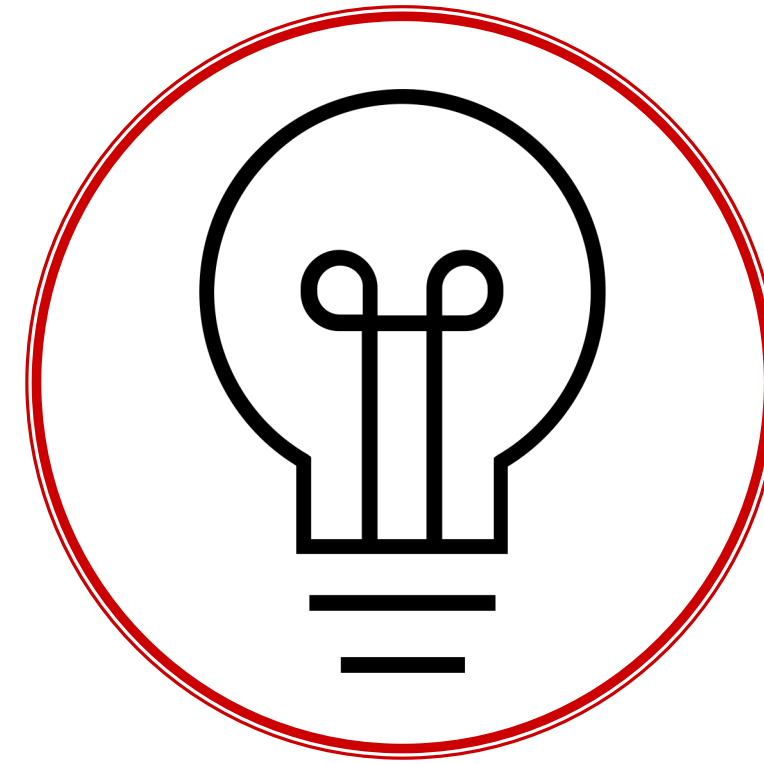
- Most users mentioned it would not be helpful

IT ASSETS WIDGET



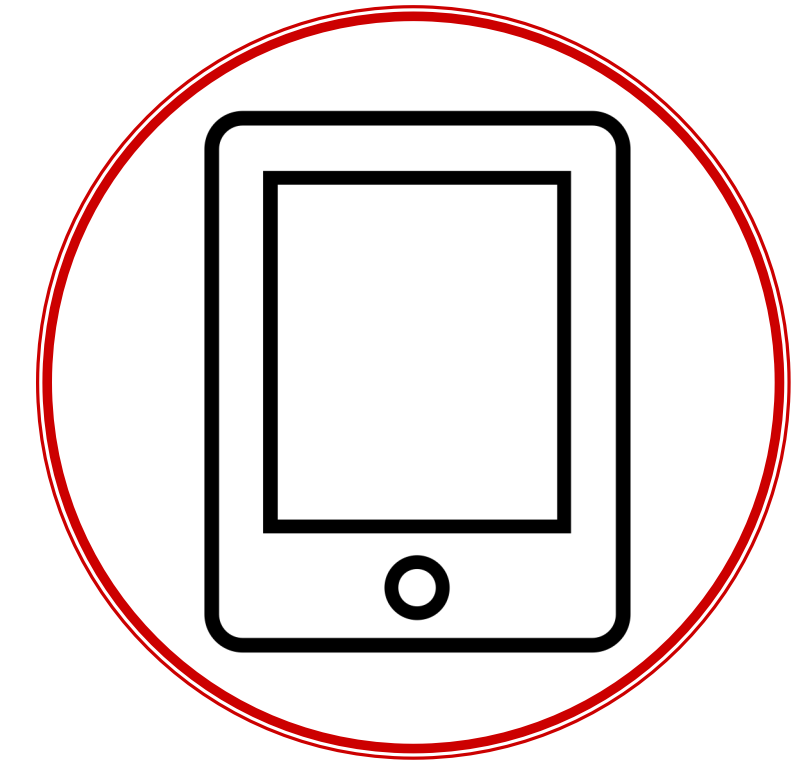
Confusion

- What belongs in widget
- What an “IT Asset” is
- Cloud or regular subscriptions



Insights and Opportunities

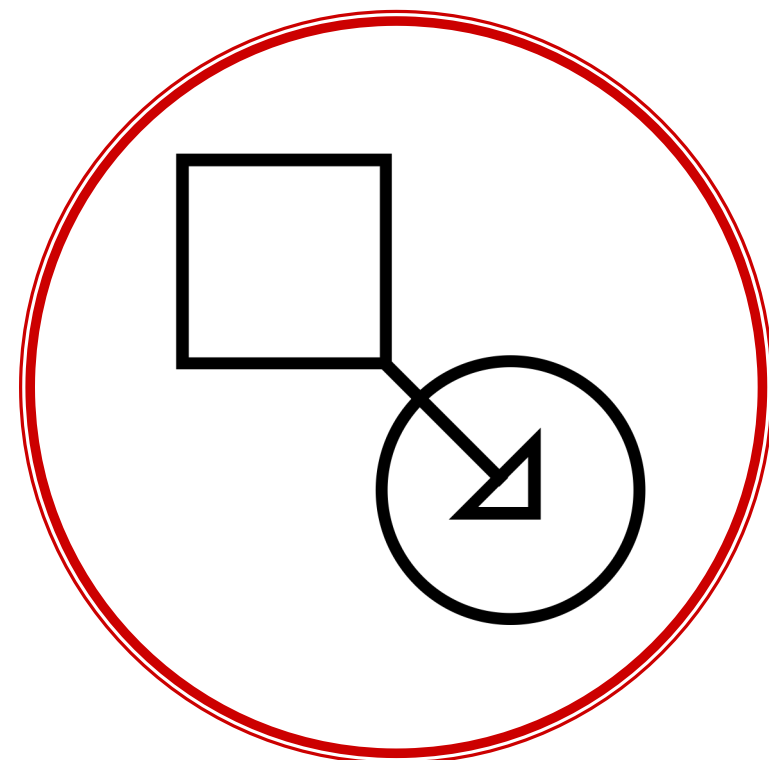
- Currently use spreadsheets for tagging
- Customize content
- Add non-CDW data
- Linking assets to service agreements



Hardware Assets

- Looked like an ad
- Separate from other assets

GENERAL AND NAVIGATION



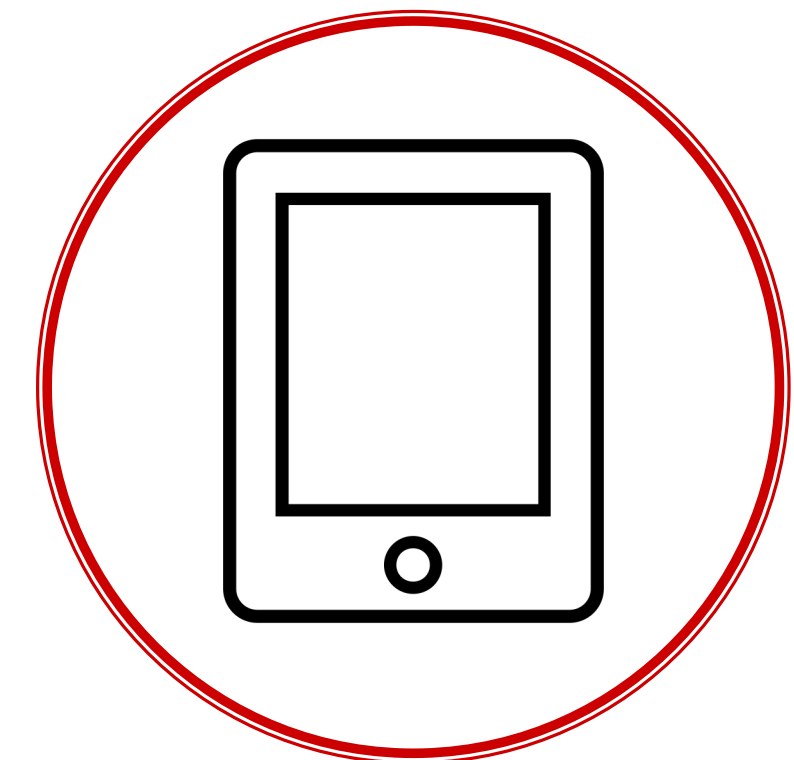
Positive reception

- Initial interactions were all positive
- Most users appreciate the general look and feel
- Most users commented on the subtle uses of color



Mixed density

- Users were mixed on density of widgets



Navigation mixed

- Most users found the left nav to be clear
- Some users were unsure where to find certain items



Recommendations



RECOMMENDATIONS

ACTION ITEMS

^ Action Items

Incomplete

Complete

Approval Needed

Purchase Approval Request

Review purchase to make updates

ORDER #

[3245678](#)

PURCHASED

02/01/2021

APPROVERS

3

PURCHASER

Matt Smith

Review

Quote Reminder

New Online Quote

View your recent quote request

QUOTE #

[1C42QNR](#)

CREATED

02/01/2021

EXPIRATION

03/01/2021

REQUESTED BY

Rachel Moore

Add to Cart

Quote Reminder

New Verified Price Quote

Prepared by your Account Manager

QUOTE #

[1C42QNR](#)

CREATED

02/01/2021

EXPIRATION

03/01/2021

REQUESTED BY

Matt Smith

Add to Cart

Incomplete tasks will be removed after 4 weeks.


- 1. Make automation a priority
- 2. Density view options (cozy + compact)
- 3. Make expandable widgets and content
- 4. Add more item types to Action Items

“ Don't want to have to manually mark as complete. ”

“ I would like to expand. I would like initially small view and then a button to do expandable view. ”

“ Would color change as it gets older? ”

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RECOMMENDATIONS

ORDERS + QUOTES

^ Orders

View All Orders →

My Orders

Company Orders

Last 6 Months

Orders Completed

8

Open

16

Items Backordered

16

Canceled

24

Need Your Approval

16

ORDER #	PO #	PURCHASED	STATUS	PURCHASER		
1C42QNR	165350	11/30/2021	All Items Shipped	Edward Kang	View Order	...
2D31QND	165349	10/28/2021	All Items Shipped	Edward Kang	Track Order	...
2V24ADR	165348	10/26/2021	Some Items Shipped	Edward Kang	Track Order	...
3A21DNC	165347	9/31/2021	Item(s) Backordered	Edward Kang	Track Order	...
4C22HA2	165346	9/24/2021	All Items Shipped	Edward Kang	Track Order	...
1Q24ANR	165348	9/3/2021	Canceled	Edward Kang	Track Order	...

Create a Bulk Order →

- 1. Improved tracking + status experience
- 2. Add menu options: Invoices, Edit, Cancel, Share
- 3. Filtering and Sorting
- 4. Density view options (cozy + compact)
- 5. Make expandable widgets and content

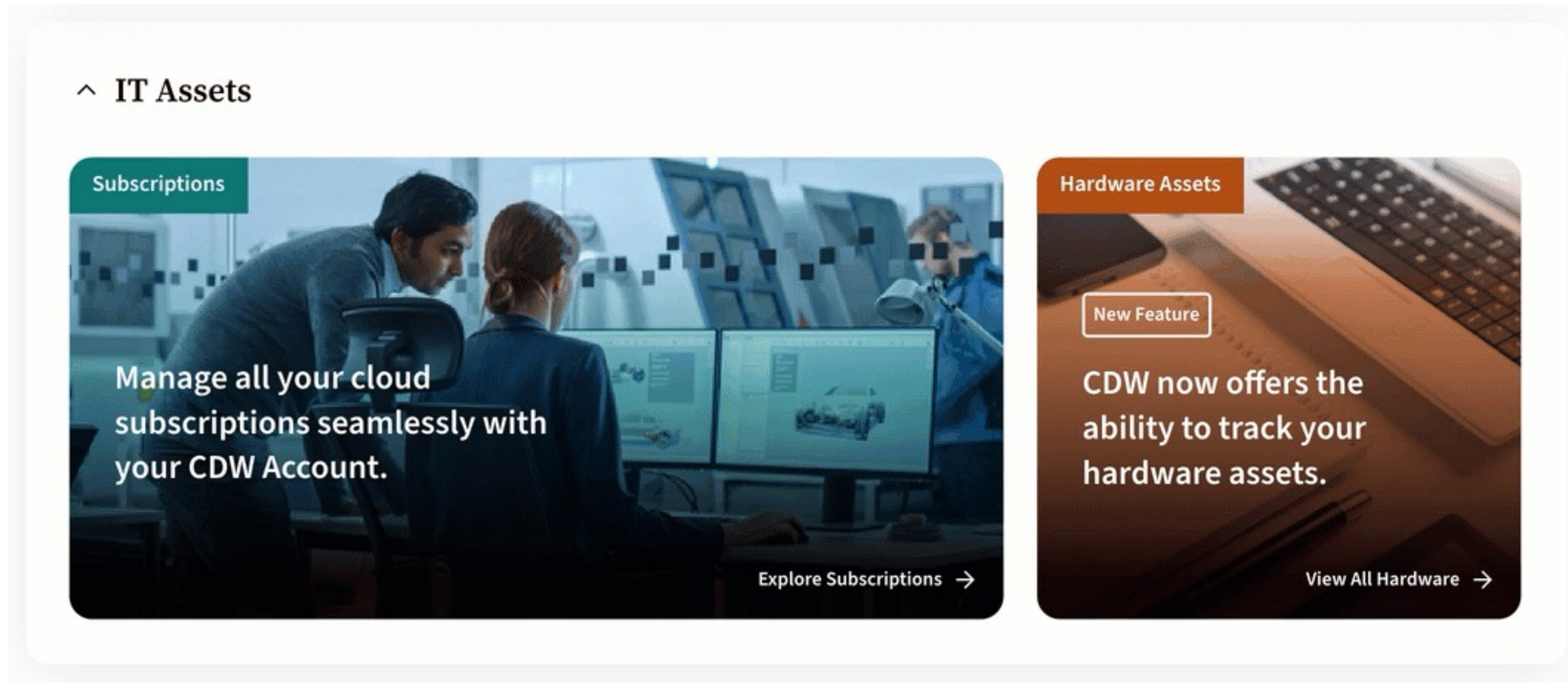
“ if I'm already looking at it, why can't I just look at the rest? ”

“ ...like to see products previously ordered with information about supply ie. In stock, backordered ”

“ Like the option to modify quotes ”

RECOMMENDATIONS

IT ASSETS



“ I would expect if I click in 30 days. it would pop up and show me what those two items are. Same thing with 90 days or 60 days. ”

1. Fix confusion – Education opportunity
2. Surface more hardware asset info
3. Add tracking of non-CDW assets
4. Customize views
5. Density options (cozy + compact)
6. Make expanding widgets and content

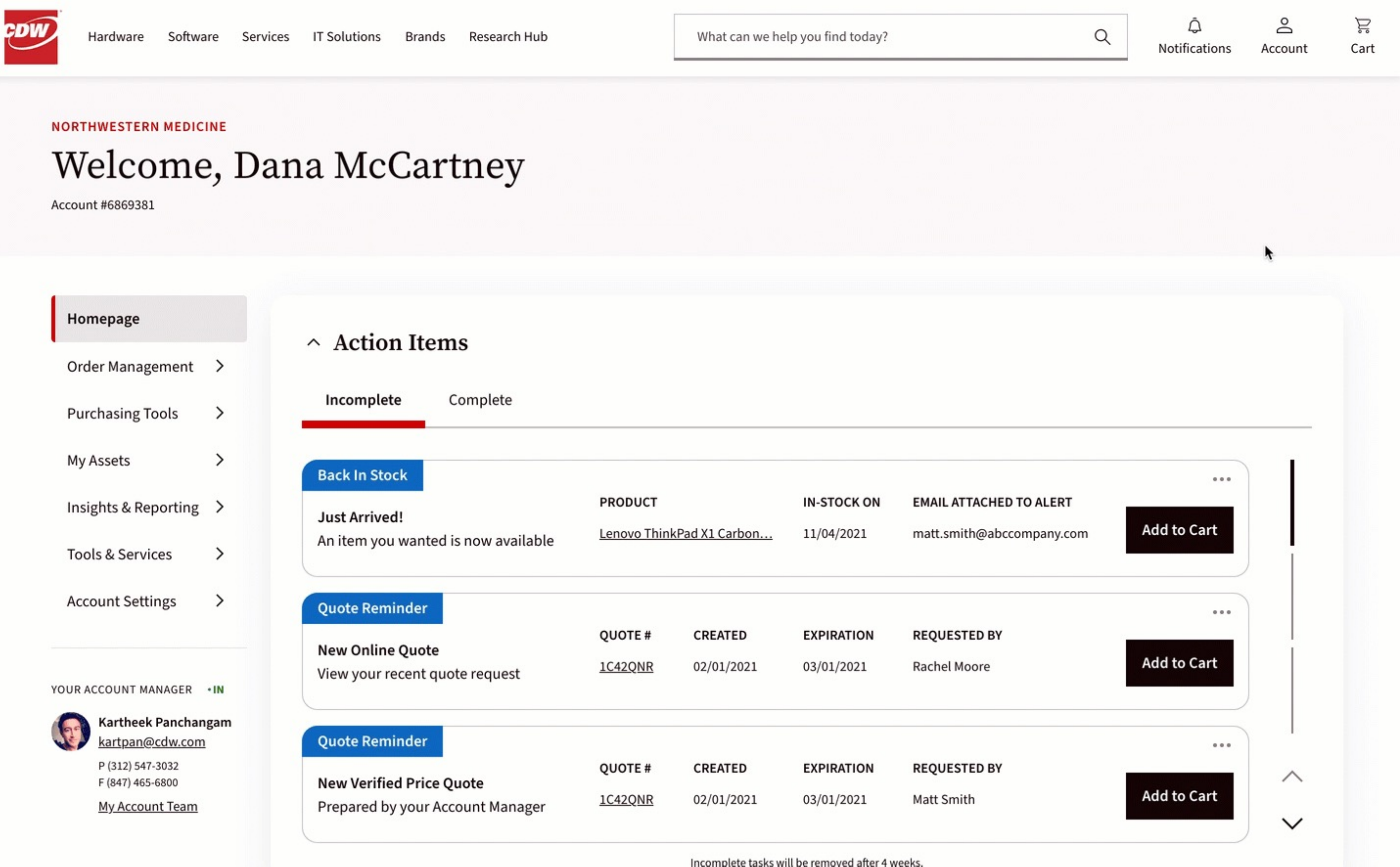
“ I'm not sure what I'm getting with this. ”

“ Was not immediately clear that cloud subscriptions were included in IT Assets. ”



RECOMMENDATIONS

GENERAL



- 1. Widget placement personalization
- 2. Density view options (cozy + compact)
- 3. Make expandable widgets and content
- 4. On right track in page layout

“ I like having the screen-used. I don't like having white space. ”

“ if I could expand get a full list view. I would like that here. ”

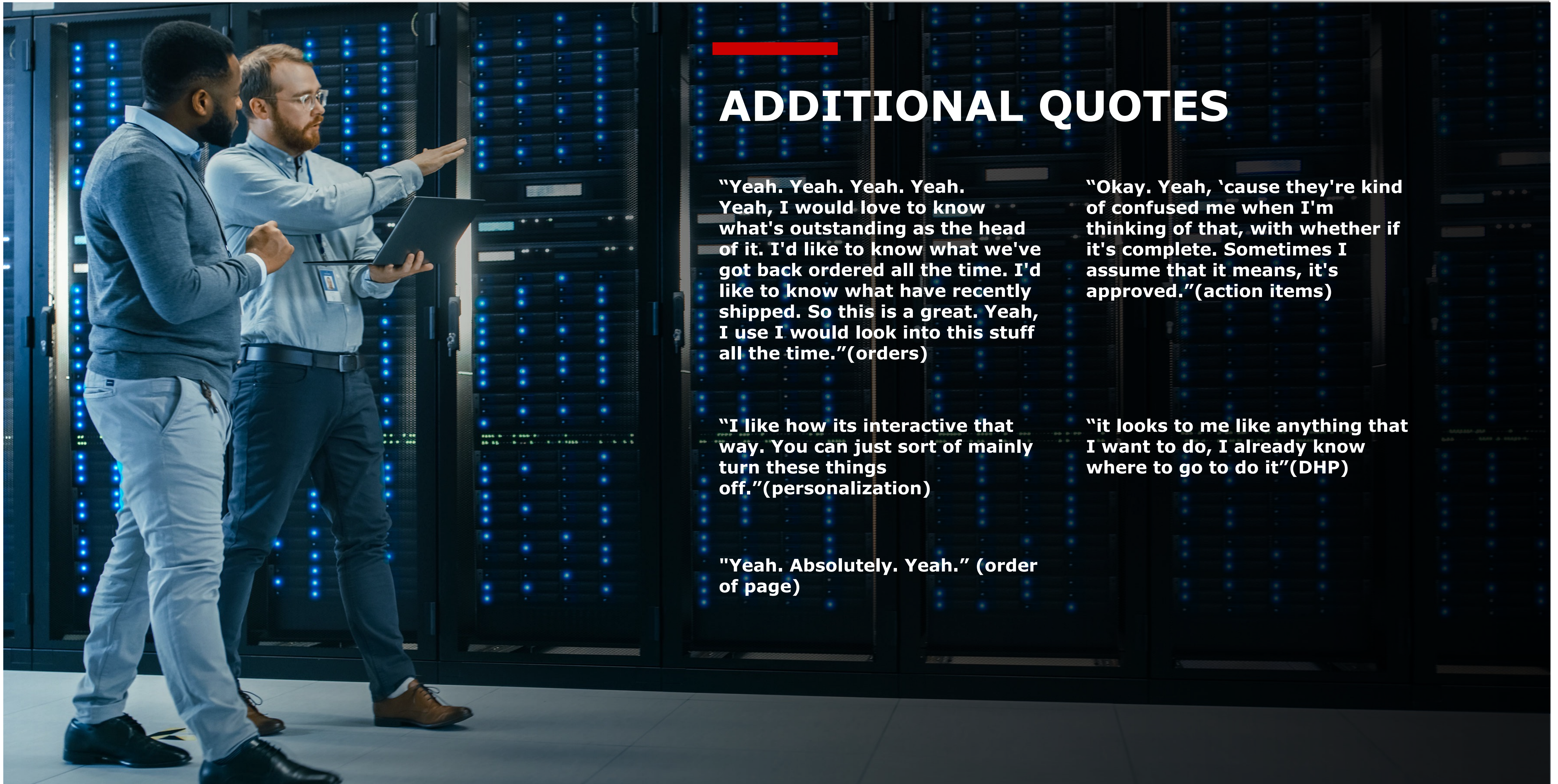
“ prefer orders on top ”



NEXT STEPS

Ongoing Discovery & Considerations

- Focused “Action Items” research: new items, new formatting
- IA Research
- Expand, reorder widgets research



ADDITIONAL QUOTES

"Yeah. Yeah. Yeah. Yeah. Yeah, I would love to know what's outstanding as the head of it. I'd like to know what we've got back ordered all the time. I'd like to know what have recently shipped. So this is a great. Yeah, I use I would look into this stuff all the time."(orders)

"Okay. Yeah, 'cause they're kind of confused me when I'm thinking of that, with whether if it's complete. Sometimes I assume that it means, it's approved."(action items)

"I like how its interactive that way. You can just sort of mainly turn these things off."(personalization)

"it looks to me like anything that I want to do, I already know where to go to do it"(DHP)

"Yeah. Absolutely. Yeah." (order of page)



APPENDIX

Monday, December 20, 2021

TEST PROMPT AND QUESTIONS

Dragon Homepage CAB research brief

DATA

Filterable Dragon Homepage user interview
compilation

Complete raw interview transcripts

C SPACE

C Space Insights presentation