• Introduction (5 mins)

First, thank you for taking time to join us today.

My name is [x]. I work with Bayer Crop Science to design and develop the tools that will enable the new global sales process. Right now, my job is to talk with sales reps like yourself so we can gauge your thoughts on the usability of these tools and make sure that we're enabling the best possible experience for users. So we'll be using your feedback from today's session to help validate and improve what we've been building.

A couple housekeeping points before we begin:

- This session will be recorded for later reference. The recording will only be used by me, and my team, so we can clarify notes and identify common patterns. Can you please confirm that I have your permission to record? [start recording]
- You'll be walking through prototypes, not a fully-functioning application, so the data you will be presented with is 100% fictitious.
- We're testing the design of the application, not you.
- That being said, nothing you say can offend us, and there are no right or wrong answers to any of our questions. We're just looking for your honest feedback.
- If you find something confusing, you're likely not alone, so don't be afraid to share your frustration. Please also share the things you do like.
- Please think out loud. The more your share, the more helpful your participation will be for everyone using these tools.
- Please feel free to interrupt me at any point if you have questions. Since I wouldn't normally be guiding you through the use of this application, I may not answer your questions right away. Also, there may be some questions that I may not be able to answer but I will be sure to follow up on those after our session.

Can you please take a couple minutes to introduce yourself and tell us your:

- Name
- Role
- Time and experience with Monsanto/Bayer
- Have you ever been involved with user testing before?

Thank you. Now, I'm going to provide a quick outline before we begin:

- Like I said earlier, we're using an interactive prototype with pre-defined clickable areas.
- I'll present each task, scenario, or goal verbally.
- Please respond verbally and think out loud before clicking. Your thought process is more valuable to me than your physical reactions.
- When you feel like you've completed a task, please indicate verbally that you are finished.
- If you are confused at any point, ask for help.
- If you want to abandon a task at any time, say so and we'll move on to the next task.
- Last, we know that you may be responsible for only some lines of business and brands. If the scenarios presented don't align to your current responsibilities, feel free to translate that to us.

Any questions?

Prototype & Task Completion (45 mins)

Scenario 1

To start, we're looking a year ahead—for the sake of this test—to our 2021 Sales Campaign. You've already identified your key accounts and set a preliminary forecast for each account at the Product Group/Product Brand level—this includes total corn seed sales units, total crop protection purchase value, etc.—before having a conversation with the Account so you can detail it at the product level. As an example activity, today, you'll be finalizing a 2021 Future Season Forecast for DEKALB Corn.

Question: **Before we continue, would you like me to repeat any of that?**

This is the Customer Plus mobile application. It's offline enabled so that you can use it in the field when wi-fi is unreliable or not available while engaging with your accounts, and everything we do here will communicate with our online tools. Take a minute to review this screen. Can you provide a quick overview description of what you see? **[Goal: To get general feedback on screen data and layout]**

Note: **Make sure to prompt for or point out the Future Season Forecast total at the top of the screen, defining the relationship of the individual products rolling up (if the user does not address it)**

After feedback: If you wanted to access more data on a product—DK641 specifically—how do you think you would do that? **[Goal: User suggests tapping on product card]** *Ask user to click card once they identify it

Scenario 2
Now that you've accessed more product data, take a second to review this screen and provide an overview of what you see. **[Goal: To validate that user has all of the expected data for a product]**

After feedback: If you wanted to return to the previous screen, how would you do that? **[Goal: To test affordance of back arrow]** *Ask user to click back arrow once they identify it

Scenario 3
During conversation with the account, they've decided to purchase a new product, so we need to add that to our forecast. Can you identify how you would add a new product? **[Goal: To test identification of the FAB]** *Ask user to click the FAB once they identify it

Scenario 4
The Floating Action Button you tapped has a few options. **Let's review them real quick and see if the one you need is here**. *Instruct user to click on Products option once identified

Scenario 5
And now we've accessed a list of products. Can you provide us with an overview of what you see on this screen? **[Goal: First impressions. Secondary goals: Identify search bar for long list and an understanding that these are corn products only]**

Follow up question: This is all seed data. What would you expect to see for crop protection?

After feedback: The product you'll be adding to your forecast is the first one, DK632. Can you identify how you would select that product? **[Goal: User identifies radio button check box]** *Ask user to check box after identification

After selection: Since this is the only product you'll be adding, how would you finalize the process of adding it? **[Goal: User identifies the Add Products button]** *Ask user to click the button once they identify it

Scenario 6
Great. You've added the product, but now you need to update the forecast number. The customer anticipates that they will purchase 625 units of the product. How would you enter that number? **[Goal: User identifies input field]** *Ask user to click the input field. Number will auto-populate.

After click: Now that you're finished forecasting corn products for this account, let's confirm that the total for all products rolled up to our overall Product Group/Product Brand forecast. **[Goal: User identifies relationship between forecast input fields and the total rollup card at top]**

After feedback: Now that you've completed the DEKALB Corn forecast for this account, let's switch over to Salesforce (the other prototype) for an overview of our total Corn Future Season Forecast.

Scenario 7
Ignoring the graph for now, can you provide a quick overview of what's being presented here? **[Goal: To get feedback on data of Forecasted Product Summary]**

After feedback: Completing and submitting a Future Season Forecast for each individual product helps Bayer better prep product supply for the next season. You're not completing a forecast for all accounts, so it's important to enter a forecast number that takes all of your Accounts into consideration: Meaning 100% of your territory. Let's update the Future Season Forecast for the last product to account for un-forecasted Accounts as well. (user clicks input). Do you feel like you're finished? **[Goal: To see if user notices field highlight and/or Cancel and Apply buttons to save changes. A/B testing with auto-save]** *Ask user to click Save button and confirm total rollup

Scenario 8
Great. Now that you've made the necessary changes, you're ready to submit it to your manager for review. Can you identify how to do that? **[Goal: User identifies Submit button]**

After feedback: Now your manager will review it and either approve the forecast or potentially request revisions. You can expect to hear back from them shortly, but otherwise that wraps up completing a Future Season Forecast.

Next, we're going to move into the future, roughly 4-6 months before the beginning of the 2021 Season. You received your Sales Territory target and you need to build an Account-level plan to reach that target. But, before we do that, I have a couple quick questions on the Future Season Forecasting process:

Post Future Season Forecasting questions:
- Did you find the tools to complete this portion of the Future Season Forecast user-friendly?
- Did you feel like there was any data missing that would be beneficial in selecting a product?
- What did you think about the Floating Action Button as a means to add a new product?

After questions: **If you just click on that success message at the bottom of the screen, it will take us to our next scenario**. *User enters the Account Planning prototype

Scenario 9
This is the Account Planning dashboard, a tool that exists in Salesforce online to aid in all planning activities. Like Future Season Forecasting, Account Plans will be defined for your most important accounts. You will have completed a Future Season Forecast for some of them, but for others this may be the first planning step. If you scroll to the bottom you'll see a full list of your accounts.

Direct user to Account List: From here you'll see that you've got a pretty lengthy list of accounts. **Take a second to review and let me know if you have any questions.**

After questions Do you see any features that might make it easier to find the Dean Weinman account? **[Goal: For user to identify the Search bar]**

When search bar is identified: Go ahead and click in the search field. (Results are returned) We went ahead and typed it out for you. Do you feel that gives you the ability to quickly find the accounts you're looking for? **[Goal: Direct feedback on mitigating long account lists]**

Follow up question: (if user doesn't address filter) Do you see any additional options for defining more specific search results?

Let's go ahead and select that account.

Scenario 10
Now we've reached an account profile. Go ahead and give us an overview of what you see, including the options you have for account planning activities for the account. **[Goal: To get feedback on Account profile and tab navigation options at a high level]**

From this screen, we'll begin building the Sales Plan for the account. Can you provide us with a quick overview ~~**of the screen you landed on**~~? **[Goal: To get first impressions on top-level Sales Plan data]**

After feedback: Right now we're seeing data at the Product Group level, but you'll actually start building your Sales Plan one level down, at the Product Brand level of DEKALB. This allows you the possibility to set a high-level target before detailing the Portfolio Offer at a more granular level. Let's start with Corn Seeds. Do you see a way to access the next level of that product hierarchy? **[Goal: User identifies the accordion icon to access Product Brand]**

Scenario 11
With this new level displayed, can you briefly describe the relationship you see between the Product Brand data for DEKALB and the Corn Seeds Product Group? **[Goal: To validate understanding of data roll up]**

After feedback: During your last check-in with the customer you noted that you need to update your Sales Plan number for DEKALB to 4,850 units. How would you make that change? **[Goal: Validate understanding/affordance of input fields]** Go ahead and click there to make the change and describe to us what happens. **[Goal: To get verbal feedback on auto-save vs. click-to-save preference]** *Ask user to click Save button

Follow-up question: You encountered saving in two different ways. Did you prefer one over the other?

After saving: You can see that once the data is saved, the total at the Product Group level updates, and then rolls up to the total Sales Plan. You're done adjusting your Corn Seeds Sales Plan, so we can go ahead and close the Corn Seeds row. **[User taps arrow to close]**

Scenario 12
Next, let's take a look at updating the Sales Plan for Fungicides

Now we could stop here and call it a day, but you also have the opportunity to plan at a more granular level, the detailed Portfolio Offer. How would you go about accessing the individual *products* in your Sales Plan for DEKALB? **[Goal: User identifies Edit Products Plan button]** *Ask user to click Edit Products Plan button

Scenario 13
Can you provide us with a high-level overview of what you're seeing here? **[Goal: To get first impressions on Products Plan screen and how it relates to previous screen]**

After feedback: You're not actually going to update anything at this level. But you do want to take a look at calendarizing your Sales Plan for the first product, DK641. Can you identify a way to access that? **[Goal: User identifies Calendarize button]** *Ask user to click Calendarize button

Scenario 14
Can you describe this screen for us? **[Goal: To get first impressions on Sales Plan by Month screen]**

After feedback: And let's actually pause here because I have some questions specific to this screen, as well as the Sales Planning process. First, if you wanted to calendarize additional DEKALB products, **do you see a way to do that**? **[Goal: Looking for user preference of using picklist or back arrow to return to previous screen]** And if you wanted to return to **the previous screen that contained** your full list of DEKALB products? **[Goal: Identification of back arrow in app versus back arrow in browser navigation] What** if you wanted to exit the Products Plan screen **and return to planning at the Product Brand level**? **[Goal: Identification of X to close "modal"]**

Post Sales Plan Questions:

- Are you currently using an Excel spreadsheet or similar tool to do your Sales Planning today? What do you think about the Account-focused and multi-level input approach compared to that?
- What about the value in calendarizing versus only managing at the Product level?
- When editing the Sales Plan target at the Product Brand level: Is volume enough? Would you want to be able to toggle currency as well?

At this point we should have returned to the Sales Plan screen displaying Product Groups, but questions may have caused them to move around. If needed, instruct user back to this screen.

Scenario 15
To finalize your Account Planning activities for this account, you're going to allocate the resources needed to close the sale, related to the desired customer experience, by updating the Resource Plan. What you may know as Market Funding or Marketing Programs are herein referred to as Engagement Programs that you can select, or may be automatically selected by Marketing, to enroll your accounts in programs. Can you identify an option for navigating to resource assignment? **[Goal: Test understanding of Resource Plan navigation]** *Ask user to click Resource Plan tab

Scenario 16
Great. Now that you've navigated to the Resource Plan section, can you identify where you would manage and enroll the account in Engagement Programs? **[Goal: Test understanding of Account Engagements sub tab]** *Ask user to click Account Engagements sub tab

Scenario 17
Can you provide us with an overview of this screen? **[Goal: Top level screen feedback]**

After feedback: Can you identify a way to enroll the account in a new program? **[Goal: User identifies the Add Engagement Program button]** *Ask user to click the Add Engagement Program button

Scenario 18
The first thing we want to do is select the program. How would you do that? **[Goal: User identifies the Select pick list]** Let's click that button.

After feedback: We went ahead and highlighted the program we'll be adding today. Go ahead and select that one.

Scenario 19
You'll see that your program selection came with a lot of pre-populated data related to the Engagement Program. Can you give us an overview of what you see? **[Goal: To get feedback on all data related to a program and Add Program modal]**

After feedback: There's a lot here, and you'll notice that we're not seeing everything displayed in the window. Let's click on the scrollbar to the right of the modal window to scroll down and see the rest. (User clicks scroll bar).

You won't be editing or adding any additional personalized gifts today, but you do need to fill out the Cash Discount details. The first step is adding the desired discount amount. You'll be adding a total discount of $2,000. Can you go ahead and do that? (User clicks input field). And let's finalize the discount type as well (User clicks Discount Total field and selects Dollars)

After clicks: The last thing we're going to do is add a Condition that needs to be completed. This program requires that Farmer Customer sales must be reported for reconciliation. Let's click to add that (User clicks Condition field).

And we're done. Go ahead and click Add.

Scenario 20
Can you confirm on this screen that the Program was successfully added?

Great. Would you mind providing us with your overall feedback on the process of adding an Engagement Program?

After feedback: At this point you've completed the Account Planning activities you intended to. Completing Account Plans for all Accounts allows the sales campaign to begin. To make sure you're successfully managing *this* account, let's go ahead and schedule a Touchpoint to follow up with the customer when the selling season is underway. To do that, you'll return to the Customer Plus mobile application (switch to previous prototype)

Scenario 21
We use the term Touchpoint to refer to any interactions you'll be scheduling with your accounts. So, to finish up today, you'll be creating a new Touchpoint with Dean Weinman with some notes to aid in managing the account relationship. From this screen, how do you think you'd create a Touchpoint? **[Goal: User returns to FAB as single source of adding something]** *Ask user to click the FAB

Scenario 22
And do you see an option for Touchpoint? (User clicks Touchpoint option in FAB)

Scenario 23
To speed up the process, we went ahead and filled in some details for you. Can you provide us with a quick overview of this screen? **[Goal: To get feedback on Schedule Touchpoint screen and details]**

After feedback: You just enrolled your account in a new Engagement Program that had some Activities associated with it. To make sure you're addressing those activities, let's take a look at adding some to this Touchpoint for future reference in pre-call planning. Can you identify how to do that? **[Goal: User identifies the Select Activities button]** *Ask user to click Select Activities button

Scenario 24
You'll see that all of the Activities related to the Engagement Program you just added are available in the Open Activities list. Can you give us an overview of the data related to the Activities? **[Goal: User identifies program name, step, and due date]**

After feedback: You're scheduling your Touchpoint for February 10, and it looks like the first activity is due around that time, so let's add that Activity with the intent of completing it during your visit. How would you select and add that Activity? **[Goal: User identifies radio check box and Continue button]** *May need to prompt after box is checked to move on

Scenario 25
Before we wrap this up, let's add some notes just to make sure you don't forget anything you have planned. Notes are a good reference for pre-call planning. Go ahead and click the Notes field to add them, and then give us a quick rundown of this screen before we finalize scheduling it so we have a good overview of what we're expecting to do during this visit.

Follow up question: Are there any additional elements you would consider important to have visibility of when scheduling a Touchpoint to help you adequately prepare for an account interaction?

After feedback: Thank you. If everything looks correct, I think we can go ahead and get that Touchpoint scheduled **[Goal: User taps Schedule Touchpoint button]**

Scenario 26
And we're presented with a confirmation that our Touchpoint was successfully created.

Excellent! That concludes our prototype walkthrough for today. When we return for session 2, we'll use the Touchpoint we just scheduled as a starting point. Before we get into additional feedback and any questions you might have, I've got a few quantitative questions I'd like you to answer on a scale of Strongly Disagree, Disagree, Neutral, Agree, or Strongly Agree

Quant Feedback (2 mins)

- I feel that the user experience of the online Account Planning application is ideal
- I was provided with all of the data I needed to effectively execute a Sales Plan for my account
- I feel that the user experience of the Customer Plus mobile application is ideal
- I'm excited about adopting these tools for future use

Additional Comments and Questions (8 mins)

That concludes all of my questions. Thank you so much for your time. Do you have any questions for me or any additional feedback you'd like to provide?

Thanks again. Your feedback will be super helpful as we continue to build.

Notes:

The process of scheduling and completing Touchpoints will make me more effective in planning and executing future interactions with accounts -save this one for session 2.