

UX Brief - Tagging Contacts

We also have a version of this template with explanations for the sections [here](#).

Goal of the Project

~~The goal of this project is to allow tagging contacts in HN-Connect so we can segment contacts.~~

The goal of this project is to get data in place for segmentation in HN-Connect.

"Segmentation = 100% of people in groups. Divide the whole into parts that add up to 100%."

Frame the Problem

✓ [What, Why, Who and Where](#)

What

- The problem is people are using the name field to keep track of segments (i.e. Nancy - Lead, John - Pres. Team, etc..)
- The problem is the system currently doesn't support tagging people
- The problem is filtering on contacts pages is very slow.
- The problem is filtering on contacts pages is limiting.
- The problem is we can't target specific content in journeys
- The problem is we don't know how to segment contacts

Why

- It is a problem because it is unrealistic to ask users to do this. It is time consuming and unnecessary.
- It is a problem because we didn't include it in the first release.
- It is a problem because the system performance is not good.
- It is a problem because we don't have a lot of filtering options currently
- It is a problem because journey takers may not get the best content for them personally
- It is a problem because without proper segmentation, we will lose out on potential sales because people aren't engaged.

Who

- Distributors with large organizations have this problem
- People who currently use weird naming conventions (i.e. Nancy - Lead, John - Pres. Team, etc..) have this problem
- Distributors that have contacts that don't fill out wellness profiles or other questionnaires have this problem (i.e. people that use things like Google docs to craft their own wellness profiles outside of myHerbalife/GoHerbalife).

Where

- The problem arises when I have to use weird naming conventions for contacts.
- The problem arises in contacts list where I don't have sufficient segmentation
- The problem arises when trying to put contacts in the journey that best suits their needs.
- The problem arises when trying to utilize Einstein for better predictions, since the system doesn't have all important data available to it.
- The problem arises when distributors don't use wellness profile or other questionnaires to obtain customer goals, but don't have a way to enter them in to the system.

Predispositions

✓ [What do we know, not know and assumptions](#)

What do we know?

- We have 3 initial tags for segmentation:
 - Healthy Weight
 - Look Good/Get Fit

- Wellness
- These 3 need to be implemented by Honors (March)
- These 3, only one can be selected at a time
- Need to manually enter the goal if contact doesn't
- Need to have only one in a category can be selected
- Need to have multiple in a category can be selected
- Need to be able to change selection in the categories where only one can be selected.
- Need to be able to deselect a tag category where only one can be selected.
- Need to be able to add and remove tags in categories that allow more than one tag to be selected
- Clearly display active tags
- tags need to be searchable
- Need "Corporate Tags"
- Need "Custom Tags"

What do we not know?

- What is the character limit for tags?
- Will we allow special characters?
- What is the development effort?
- What is the timeline for the full version?
- Should smart tagging be the primary mechanism for segmentation?
- Should existing fields be "corporate tags"?
- Should there be a way to clean up contacts that use the weird name segmentation?
- Should I be allowed to bulk tag contacts?

What are your assumptions about the project?

- Tags are sorted by system vs custom
- Tagging is the best way to get eyes on groups of people
- Best approach is segment first systematically
- Filters and tags compliment each other
- Fields we have already should be "corporate tags"
- Corporate tags can be smart. Auto tag a contact because they met XX criteria
- A filter is anything you can see in columns in a table
- Tag is anything that exists in the system
- Allows filtering when filters aren't available.

Who are the users?

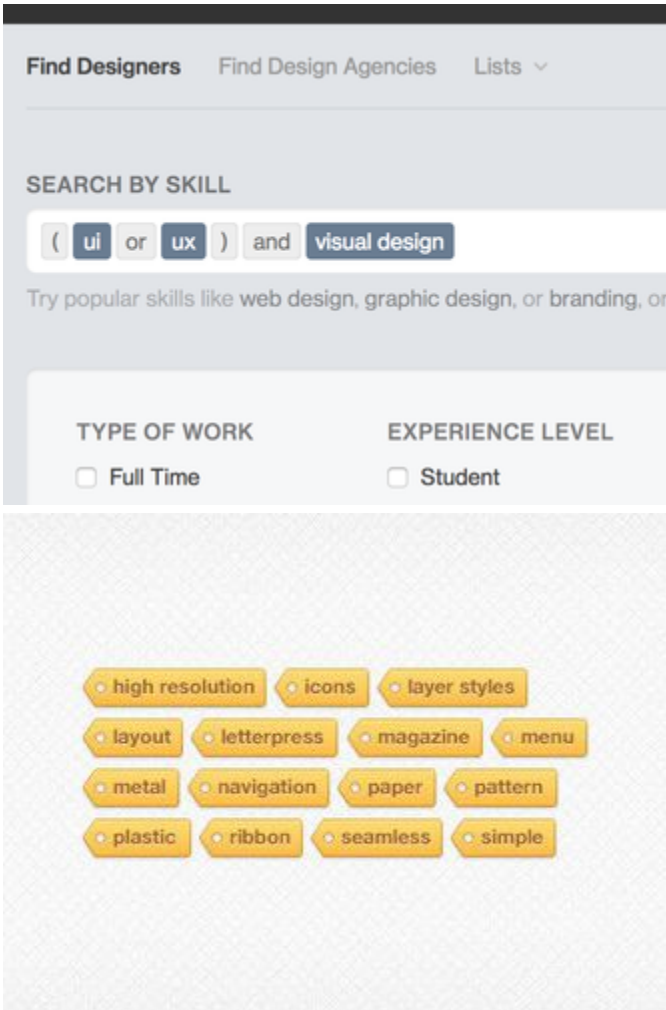
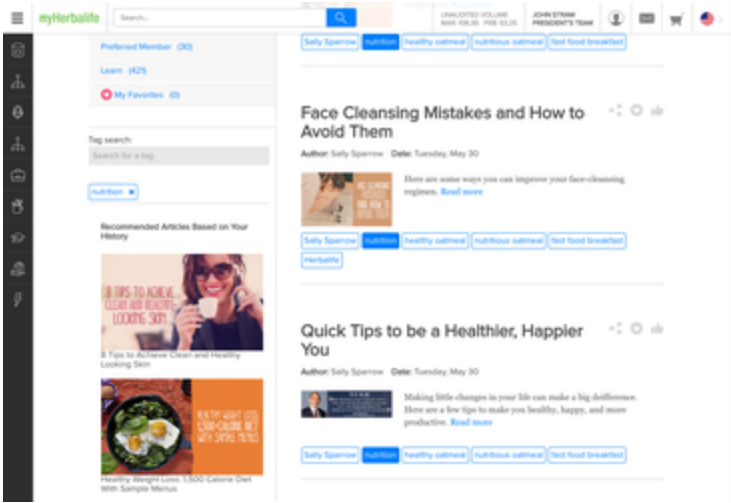
- Personas:
 - Randy
 - Sandra
 - Jennifer
 - Alexis
- Distributors with large organizations have this problem
- People who currently use weird naming conventions (i.e. Nancy - Lead, John - Pres. Team, etc..) have this problem
- Distributors that have contacts that don't fill out wellness profiles or other questionnaires have this problem (i.e. people that use things like Google docs to craft their own wellness profiles outside of myHerbalife/GoHerbalife).

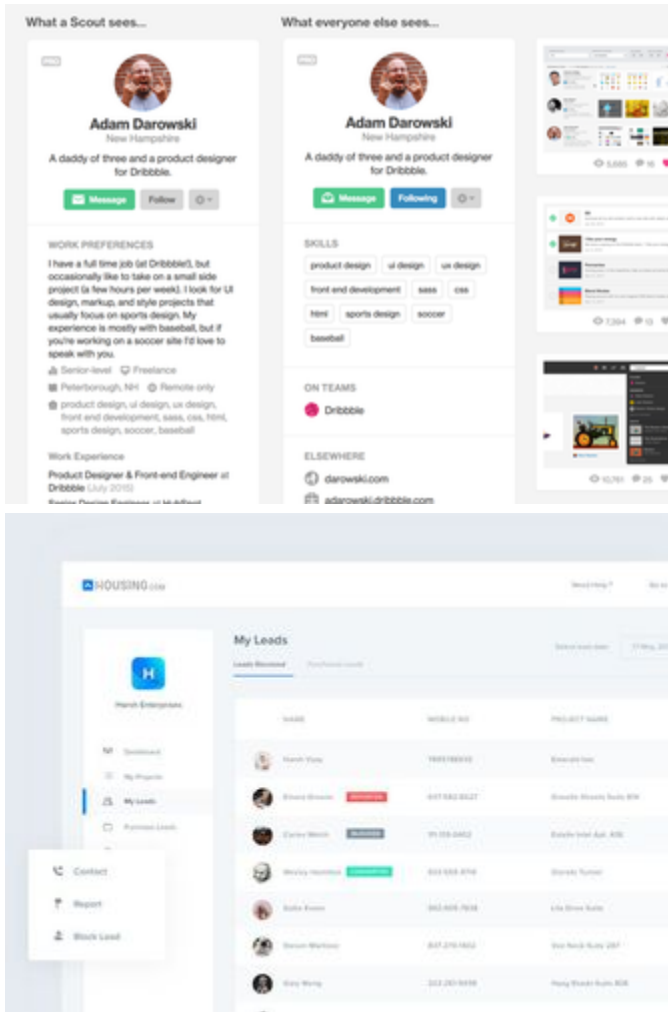
What are your assumptions about the users?

- Users will stop using weird naming conventions
- Users will want a way to transfer/consolidate weird naming convention contacts
- Users won't have to add people manually to journeys as much ince the segmentation will be more accurate
- Users will like the automation
- Users will want to add their own tags to better fit their business
- Users are not marketing professionals.
- They don't want to have to interpret fields, they want Herbalife to tell them what is important
- Users will want Herbalife to constantly evaluate effectiveness of tagging, and enhance it based on insights.

Inspiration

▼ [Images of inspiration](#)





Insights

∨ Questions, research and viability

What did we learn?

- HN-Connect smart tags initial release driven off current HN-Connect insights
 - Not responding to journey
 - Completed a journey
 - Einstein predictions
 - not likely to continue in business
 - somewhat likely to continue business
 - likely to continue business
 - recently purchased

Does more research need to happen?

- Add additional research we need here

Is this still a viable project?

- Generally, a yes or no will suffice.

What is potentially challenging?

- Add potential challenges here

Are there any gaps?

- Add potential gaps here

Drawings

Feature 1039: Allow Users to Tag Contacts in HN-Connect Contact Page

User Feature 1039 in TFS

- User Story 2719: Add Custom Tags (MVP)
- User Story 2729: Search by Tags (MVP)
- User Story 2724: View Contacts by Tag (MVP)
- User Story 2728: Auto-Complete for Tags
- User Story 2725: View All Available Tags

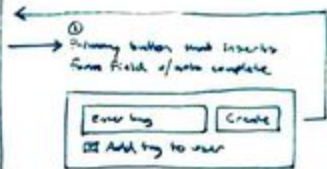
Whiteboard Drawing



Refined Drawing

15-27.9 : Add Tags to Contact

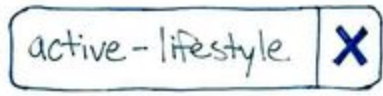
Contact Detail Page (mobile)



① Primary button that inserts into field of note complete.
 ② Submission triggers success/failure notification, inline directly above "Tags" content block.

Case 1

Anatomy of a Tag: When on contact's profile page.



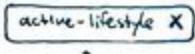
* Margins / Padding should mirror other articles tags.

← Tag name is linked to a Contact's list w/ what tag "pre-searched"

* X removes tag from contact or contact list refinement.

Case 2

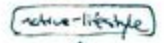
Anatomy of a Tag: When attached to a search box



↑ only removes tag

Case 3

Anatomy of a Tag: When placed anywhere else on site



↑ only links to a Contact's list w/ tag pre-searched

US-2724: View Contracts by Tag + US-2729: Search by Tag
 + US-2728: Auto Complete for Tags

Contracts Main Page (mobile)

Auto-complete dropdown showing long tags truncated and system vs. custom tags. "Herbalife-02" is a system tag

Initial state of auto complete dropdown when user has not yet created a tag.

Once the user types a tag into the search bar and hits "Enter" or "Search" button, then the tag is added to the list of tags currently filtering the list.

U5-2725 View All Available Tags

+ New page w/ all tags listed

Desktop



Prototypes

Contacts: <http://design.hrbl.net/DesignPrototypes/hn-connect/contacts.html>

Contact Profile: <http://design.hrbl.net/DesignPrototypes/hn-connect/contact-detail.html>

