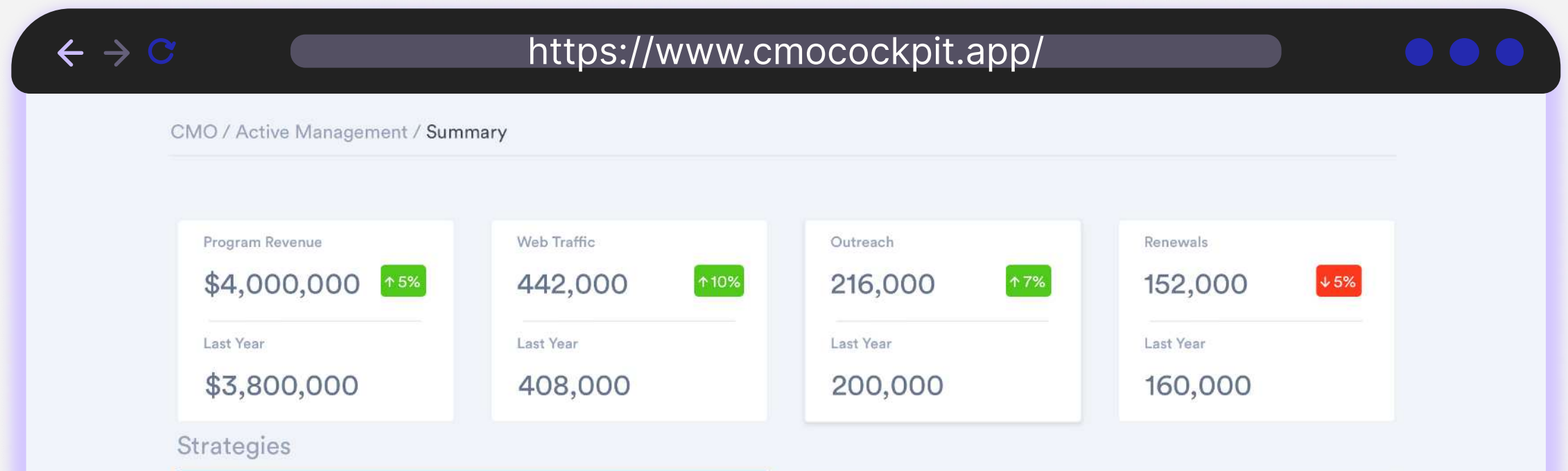


CASE STUDY #1

CMO Cockpit Web App



OVERVIEW

CMO Cockpit

My Role:

Interaction Design

UI Design

Prototyping

Wireframing

Web Development

Team:

Myself – **Design**

Business Analyst

Product Manager

Engineering Manager

Tools:

Figma

Sketch

Timeline:

3 months

OPPORTUNITY

what's the opportunity?

Chief Marketing Officers need an encompassing, holistic tool for complex decision making and analysis in a timely fashion.

the numbers on the board



38 percent of organizations report big data analytics as a high priority issue.



59 percent of businesses reported that outdated, inconsistent and/or irrelevant data is a key challenge for them.

SOLUTION

what's the solution?

The solution that is made is to build a enterprise level web application that can give executives the ability to view their organization at a high and low level.

CONSTRAINT

dealing with constraints



here's some constraints we had

- resources were limited.
- stakeholders were hard to get in contact with.
- certain members of the team have a small time window on the project.
- we did not consider the time it would take to be subject matter experts.
- success factors were somewhat ambiguous.

PRIMARY RESEARCH

Competitive Analysis

PRIMARY RESEARCH

competitive analysis



certain features
needed customer
support assistance



outdated



steep learning curve

PRIMARY RESEARCH

User Interviews

PRIMARY RESEARCH

user interviews

Interviews with over a dozen Business Analysts who have worked in the marketing field.

How long does it take to do a tradeoff analysis on a large, complex dataset?

What are current data visualizations tools do you use?

What is the biggest challenge you experience when doing an analysis?

PRIMARY RESEARCH

expert interviews

5 Directors

Over 30 Years of Experience Shared

Key Insights Gathered

Pain Points Identified

insights

 75% of experts surveyed felt that marketing analytics was the biggest way to gain a competitive advantage.

 50% of experts surveyed reported being able to use their analytics data to measure marketing performance effectively.

When viewing marketing analytics, there were three **common insights** directors wanted.

*What **happened**?*

*What is **likely** to happen?*

*What **should** be done?*

PRIMARY RESEARCH

Loretta Brown / 49 / CMO



Frustrations

- She has been asked to find and reallocate a budget for a product that's been significantly outperforming expectations due to covid-19.
- How can she get these results in time for her next meeting with executives?
- She is struggling to understand how changing her budget affects her outcomes.

act as a reminder

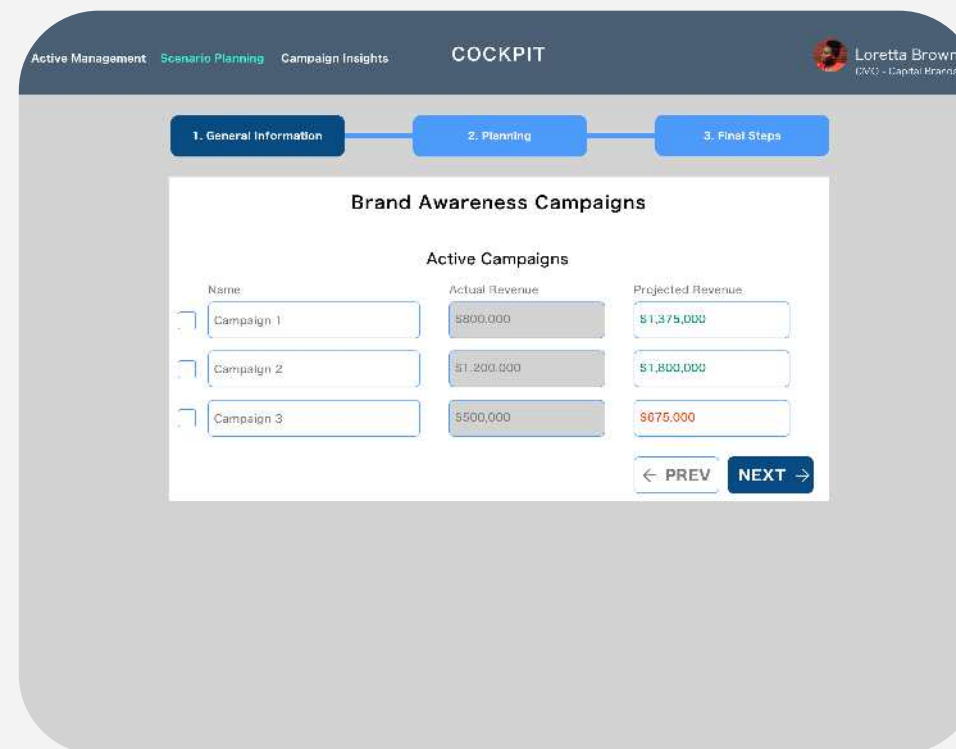
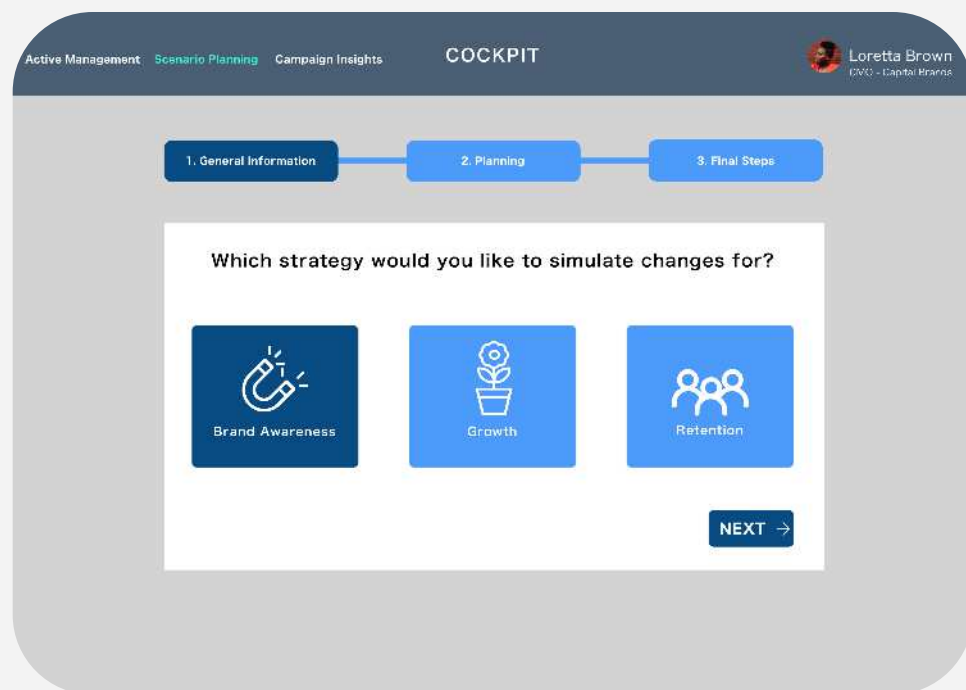
We want to be able to provide executives with a pulse check on their organization and insight into performance at a glance.

DESIGN PROCESS

Proposed Solutions

proposed solutions

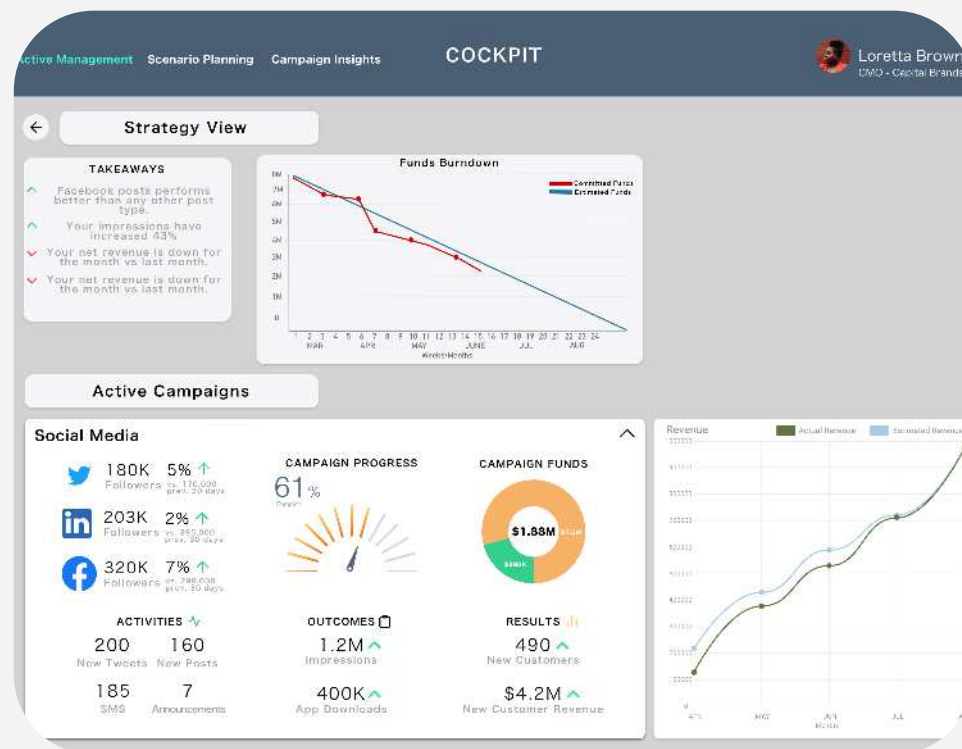
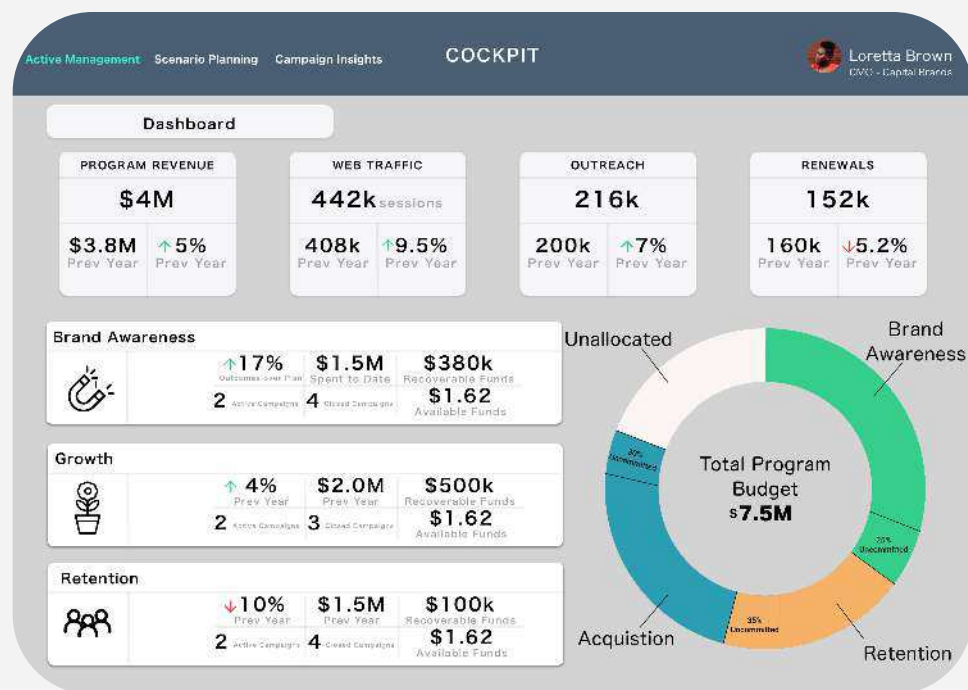
At first, we were too focused on the simulation aspect.



DESIGN PROCESS

new direction

descriptive, predictive, and prescriptive



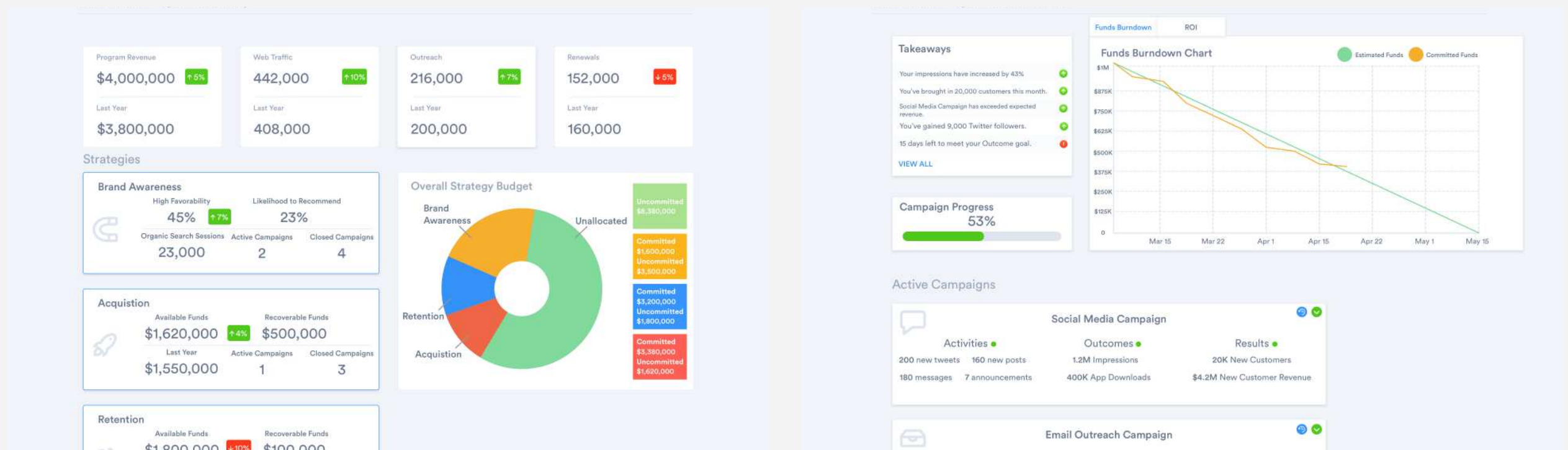
END RESULT

Final Solution

END RESULT

here's what happened

The final solution was high fidelity interactive prototype.



<https://www.sketch.com/s/805c1878-b801-477e-92f3-494e1b6bcccc>

END RESULT

more screens

CMO / Scenario Planning / Campaign Management

Total Unallocated Funds
\$365,000

Total Allocated Funds
\$1,235,000

Revenue at Risk
5.5%

Days left for Campaign
14 days

Campaigns

Social Media Campaign

Email Outreach Campaign

Campaign #3

Campaign #4

Campaign #5

VIEW ALL

Takeaways

The budget for the Social Media Campaign has been increased by 50%

Social Media Campaign has brought in the most customers.

Campaign #3 has ended and did meet estimated revenue.

Campaign #4 has the most unallocated funds: \$350,000

Campaign #5 budget has been slashed by 50%

Campaign Optimizations

Campaign Details

Social Media Campaign

\$4,200,000

Actual Revenue

\$4,200,000

Schedule

12/28/19 - 3/28/20

Budget

\$1,200,000

Estimated Revenue

\$2,700,000

Unallocated

\$350,000

Estimated ROI

125%

Dollars Tied to Activites

\$50,000

Activities

200 new messages
160 new posts

Results

1.2M Impressions

Campaign Details

Email Outreach Campaign

\$675,000

Actual Revenue

\$675,000

Schedule

12/28/19 - 3/28/20

Budget

\$400,000

Estimated Revenue

\$550,000

Unallocated

\$15,000

Estimated ROI

37.50%

Dollars Tied to Activites

\$55,000

Activities

12.2k emails sent
10.3k newsletter created

Results

83.3% Click Rate
23.6% Open Rate

Outcome

20.3k new subscribers
\$675K New Customer Revenue

Campaign Details

Social Media Campaign

\$4,200,000

Actual Revenue

\$4,200,000

Schedule

12/28/19 - 3/28/20

Budget

\$1,200,000

Estimated Revenue

\$2,700,000

Unallocated

\$350,000

Estimated ROI

125%

Dollars Tied to Activites

\$50,000

Activities

200 new messages
160 new posts

Results

1.2M Impressions
400K App Downloads

Outcome

790 New Customers
\$4.2M New Customer Revenue

final impact

🔥 Reduces manual reporting time by up to 70%

🔥 “Great for in-house marketers managing campaigns on multiple platforms or ad agencies managing campaigns for several clients.”

lessons learned

- Balance business needs with user outcomes
- Pitching & 'selling' succinctly are critical DESIGN skills.
- Always question everything & be intentional.