

# Rokid

UX research - lead generation system  
Done by Reegine Lim

# Project Overview

## The problem:

Rokid struggled with a poor website user interface that affects the back-end inquiry filter process. Even though there is a high volume of potential business partners writing in on a daily basis, the inquiries were not attended to in a timely manner. After taking the time in conducting user research, here's what I found:

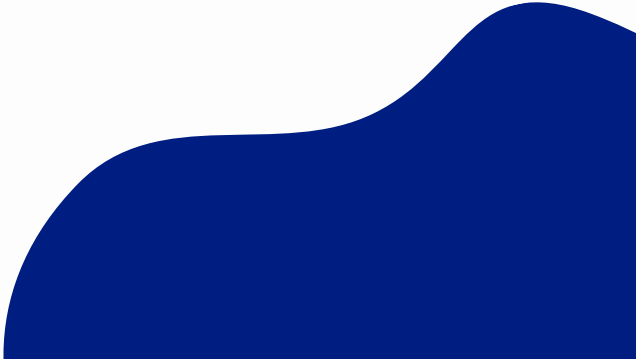
**Potential business partners did not feel appreciated when they approach the company, and the stakeholders are confused about the current inquiry processing flow.**

## The method:

- Site Inspection
- Comparative Analysis
- Stakeholder Interviews I
- Leads Management Analysis
- Stakeholder Interviews II
- Google Analytics
- Survey Questionnaire
- Solutions Design
- Wireframes I & II
- User Testing

## The Solution:

After conducting the research, I have designed a front-end inquiry flow to systemize the back-end lead filtering process, enhancing the overall user experience with the products & services the company offers.



The page features two large, dark blue abstract shapes. One is in the top right corner, and the other is in the bottom left corner, both with irregular, wavy edges. The text is centered in the white space between them.

# **Research Methods**

# #1 Site Inspection

## Overview:

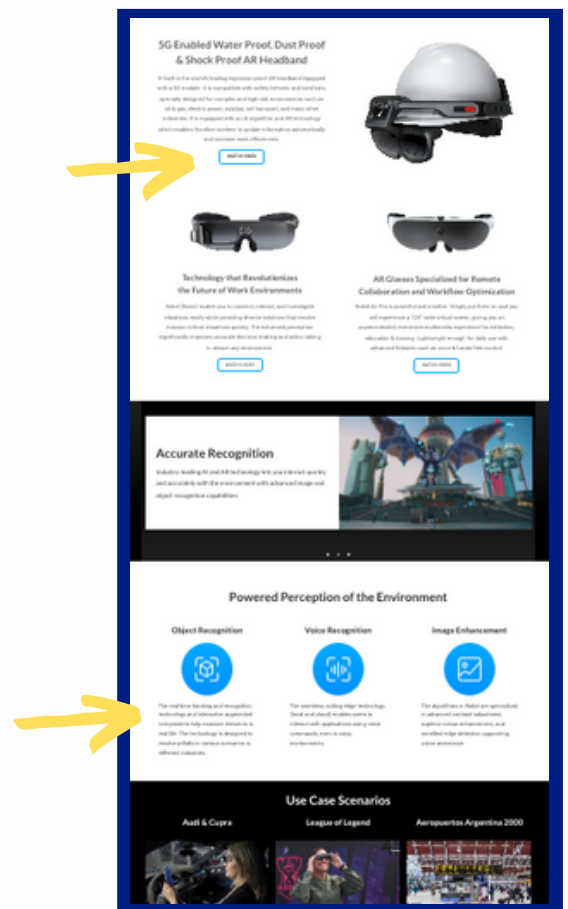
Just like any other B2B company, Rokid wishes to utilize its official website not only to deliver product information but also to generate qualified business leads. The company, however, failed to portray brand credibility on the official website and struggled to initiate customer interest in the products.

## Key findings:

- Poor content hierarchy
- Not a responsive Website
- CTAs did not drive business goals
- Too wordy (what's the selling point?)
- Missing images and contents
- Contact & Demo forms can be confusing

## Comments:

- Conducting a comparative analysis would be helpful in analyzing the missing content from the website.



# #2 Comparative Analysis

## Overview:

Since Rokid wishes to reconstruct the website interface, I thought it was crucial to perform a comparative analysis target on the two competitors - **Realwear & Vuzix** who are both key players in the Augmented Reality glasses industry. This is mainly to study what information is missing from the current website, and how can we work on brand credibility.

## What's missing?

- White paper
- Education post
- E-commerce
- Partnership highlights
- Real-life use case & data
- Product instructional videos
- Webinar announcement
- Conference and events highlight

## Comments:

- Do we have enough marketing materials or human resources to take ownership of the things that are missing from the website?
- Do we have enough resources in generating new content such as educational videos, unboxing videos, etc?
- Is it feasible to add what's missing above to the website?
- Who are the key players in this situation?
- What are their expectations in this?

# #3 Stakeholder Interviews I

## Overview:

Re-designing the website should not be an issue here, but we need to find out what works best for the internal teams. I decided to talk to the teammates whom I think have direct involvement with the website content, leads quality, and product.

## Key findings:

- Do not have marketing materials translated into English
- Do not have enough human resources to keep up with public relations management
- The company need resources in hiring third-party in order to create marketing materials
- Teams wish to automatize the acquired leads from the website to CRM and MailChimp

## Comments:

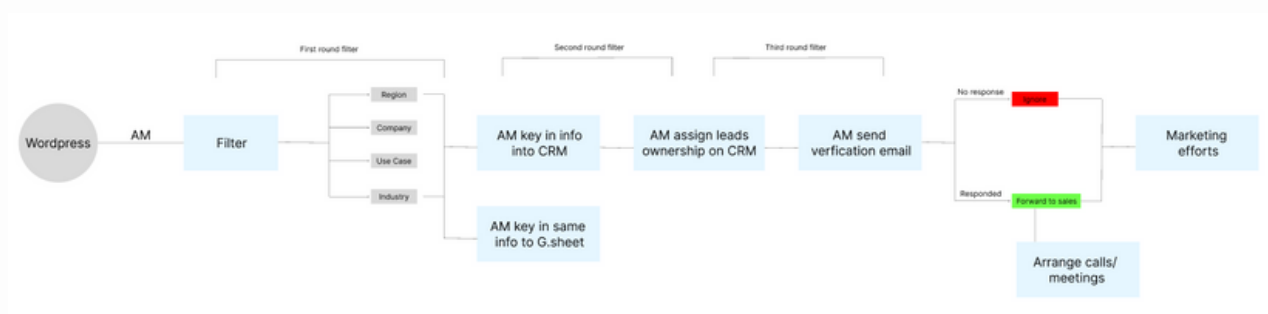
- Since **human resources and money resources are the main issues** here, I figured it would be best if I can understand what the account manager deals with on daily basis before jumping into the design solutions.
- I volunteered myself managing the existing client's account and filter the incoming leads.

# #4 Leads Management

## Overview:

I volunteered myself assist the account manager in managing the leads mainly to study the leads filtering pattern and how it affects the company's overall revenue. I also need to find out what's missing, and how can I automate the internal lead generation system to optimize the leads quality.

## Key findings:



## Comments:

- There's **no automation** at all when it comes to lead filtering, and the current system is basically all done manually.
- **Manually filtering** the leads would potentially lead to some issues due to unavoidable human errors.
- What errors occurred previously and how it affect the company?
- I need to go back to the stakeholders and ask them for further clarification.

# #5 Stakeholder Interviews II

## Overview:

I revert back to the stakeholders who have first-hand involvement in lead allocations. I wanted to drill down the internal issues before I proceed with redesigning the website interface. My questions revolved around their experience with the company, what they think about the products, and what's missing in what they are doing.

## Key findings - stakeholders:

- **Account executive** - Manually filtering leads info ↑ Human errors ↑  
Complaints receives ←
- **Sales lead** - Poor lead management = Extra unqualified leads =  
Resources wastage
- **Engineer lead** - Lack of human resources = Lack of efficiencies

## Key findings - client's complaints:

- Clients did not receive follow-ups from the company
- Clients needed extra assistance in product operations
- Clients felt neglected by the company representatives
- Clients did not get what they requested earlier

## Conclusion:

- Based on what I learnt from the stakeholder, I've concluded that potential clients did not feel appreciated when they approach the company, **while ...** the internal teams are confused about the current inquiry processing flow.



# #6 Google Analytics

## Overview:

Before making a decision on the design solutions, I decided to integrate Google Analytics into the current website to study the traffic pattern to validate the stakeholder's interview key findings.

## Key findings:

- The demo page traffic drives only less than **5%** conversion (page traffic VS demo booked).
- The contact page traffic drives only less than **8.5%** conversion (page traffic VS inquiry received).
- The average engagement time (per user) is roughly **1.15 minutes**.

## Comments:

- But wait... I figured I should also look into the user's perspective, including their preferred way of reaching out to the representatives, the devices they use, etc.

# #7 Survey Questionnaires

## Overview:

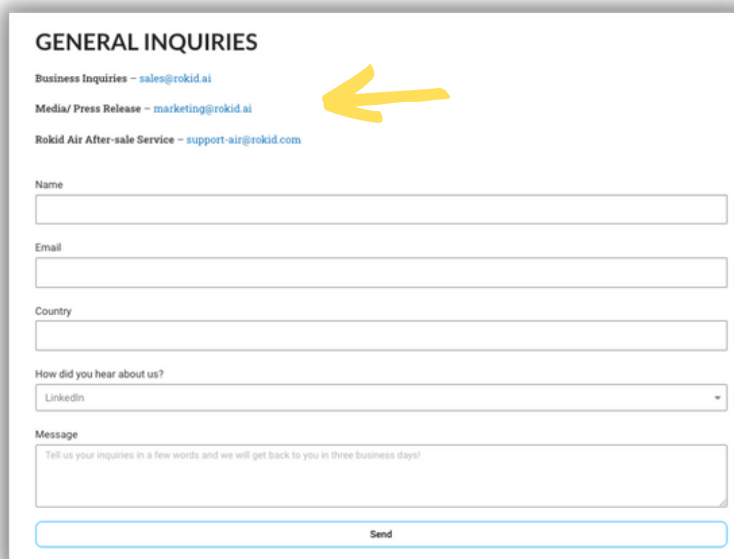
Having a sense of understanding of users' expectations helps me figure out what works best for the users. I decided to work closely with the marketing team in providing more insights into the client's persona, to help me to be more accurate when it comes to targeting the right audience for the survey questionnaires. This is to make sure the acquired insights are valuable and unbiased.

## Key findings:

- **54%** of surveyees prefer booking a demo if they **want to learn more about the products**, while **36%** prefer writing in via the contact page.
- **81%** of surveyees **want to follow up with the sales representatives** via email, **12%** via phone calls, and **7%** with Zoom calls or Google Meet.
- **92%** of surveyees would **rather go to the contact form to write down their inquiries** even though they noticed specific email addresses for their needs are provided on the same page.

## Question:

- How do I translate the research findings to Design opportunities?



The screenshot shows a contact form titled "GENERAL INQUIRIES". At the top, there are three email addresses: "Business Inquiries - sales@rokid.ai", "Media/ Press Release - marketing@rokid.ai", and "Rokid Air After-sale Service - support-air@rokid.com". A yellow arrow points to these addresses. Below the email addresses are input fields for "Name", "Email", and "Country". There is a dropdown menu for "How did you hear about us?" with "LinkedIn" selected. A "Message" field contains the text "Tell us your inquiries in a few words and we will get back to you in three business days!". At the bottom, there is a "Send" button.

# #8 Findings Translation

## Overview:

To make it easier for me to understand the research findings, I came out with a diagram addressing the customer & stakeholders' pain points.

## Key findings:



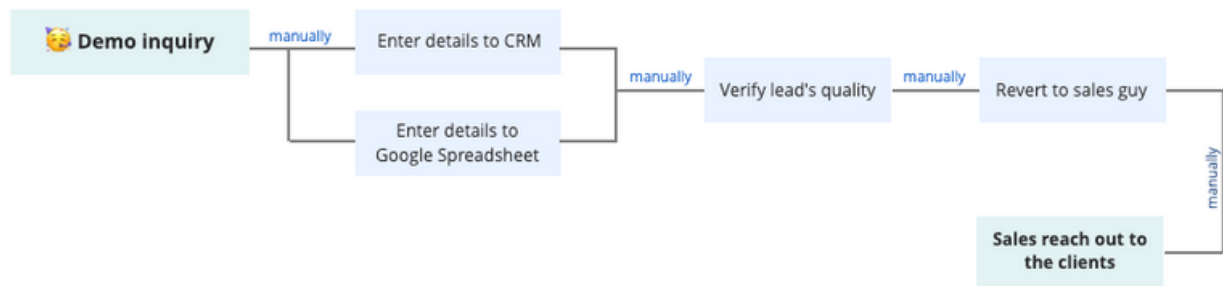
# #9 Design Solutions

## Prompt:

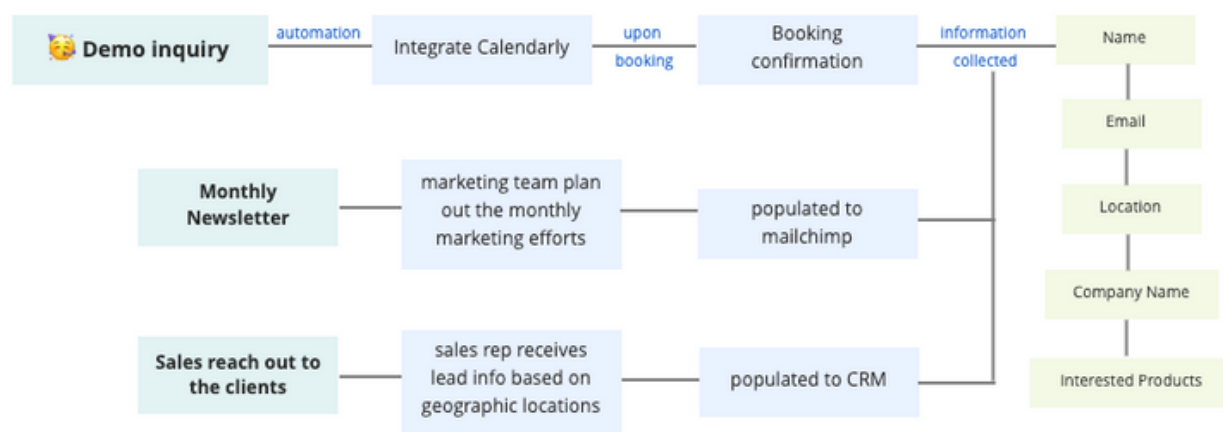
How can I design an experience that encourages potential customers to book a demo via the website, while making it accessible for the stakeholders when it comes to lead management?

## Solution:

Previous lead management flow without automation:



New lead management flow with automation:



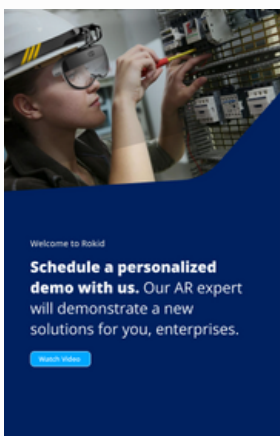
# #10 Wireframes I

## Overview:

I designed a solution that gives potential customers a better experience when they book a demo with us while easing the stakeholder's pain points of not having automation when it comes to lead management.

## Solution:

Integrate calendar feature to optimize the lead management flow



Pick a desired date & time

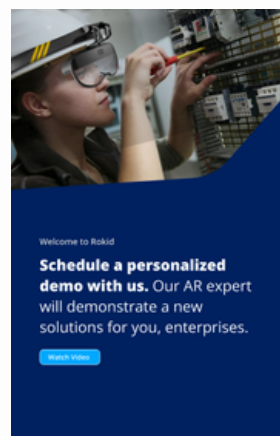
**Select preferred date**

< 2022 April >

Sun	Mon	Tue	Wed	Thur	Fri	Sat	Sun
	1	2	3	4	5	6	7
8	9	10	11	12	13	14	15
16	17	18	19	21	22	23	24
25	26	27	28	29	30	31	

**Available time slot (gmt+1)**

9:30 AM	10:00 AM	10:30 AM
11:00 AM	11:30 AM	2:00 PM
2:30 PM	3:30 PM	6:30 PM



Enter your personal information

**You have chosen**  
Date: 27th April, 2022 at 3:30 PM GMT+1

**Enter your personal information**

Your name \*  
Feblian Misch Alexandre

Your work email \*  
f.misch@petronas.com

Your company \*  
Petronas

Your region \*  
▼

Next



Choose your interested products

**You have chosen**  
Date: 27th April, 2022 at 3:30 PM GMT+1

**To personalize your demo (optional)**

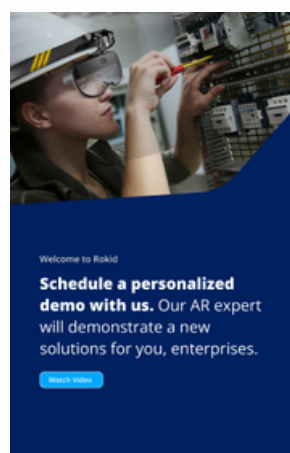
Your industry  
Oil & Gas

Your interest/interest  
Improve efficiencies at work

Interested products  
 X-Craft  Glass2  Air Pro

Type your message  
Would love to see how your products help with heavy industries like oil & gas. Thank you!

Schedule Demo



Add event to your calendar (reminder)

**We look forward to talk to you!**  
A calendar invitation has been sent to your email address at f.misch@petronas.com

**Your appointment**  
Date: 27th April, 2022 at 3:30 PM GMT+1

Add to Calendar

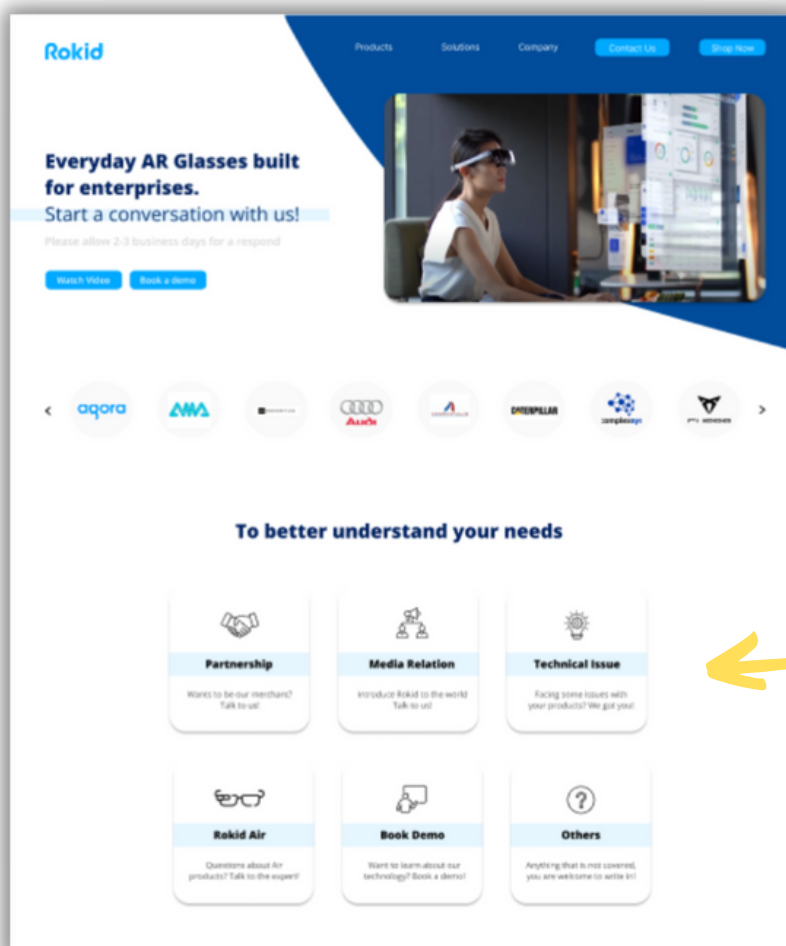
# #11 Wireframes II

## Overview:

In line with the integration of the calendar, I've also decided to look into the contact page which makes sure the stakeholders attend to their tasks in accordance with their priorities.

## Solution:

Instead of moving back & forth with the inquiry types, I designed a seamless experience for the potential customers by categorizing the inquiry types.



Now, the stakeholders can access to the inquiries they're supposed to attend without having the A.M. distributing the task manually.

# #12 User Testing

## Overview:

Although I update my progression on weekly basis with the stakeholders, I decided to launch proper user testing to understand if my design solution makes sense to them. Their feedback is highly valuable for me to iterate my design that aligns with the project goals.

## Key findings:

- Change the booking sequence on the demo page in order to achieve a higher level of efficiency.
- The first thing, when asking for a demo would be the region where the inquiry where the system will automatically push the inquiry to the right sales representatives.

We iterate from this:

1. Date & Time

2. Information

3. Preferences

4. Reminder

To this ↓

Since the leads are distributed based on different regions:

1. Region

2. Date & Time

3. Information

4. Preferences

Leads allocation  
based on region

Based on regional  
sales rep availability

5. Reminder

# #13 Reflections

## Ownership is crucial especially for start-ups

This was my first solo UX research project and it was a little draining at first because no one in the team seems to agree with what I wanted to do and they do not see the impact of user research. As persistent as I am, I decided to take up ownership of this project by writing project proposals, conducting secondary research, and even volunteering to assist the account manager just to justify the need of conducting thorough user research instead of jumping straight into web design. Eventually, I obtained a small portion of resources approved by my manager for me to continue my UX Research project. Although the journey can be rough, I am glad my persistence made it out there and I actually designed a solution that solves 80% of the lead generation system issues.

## If I have more time ...

My internship ended right after I finished conducting user testing with the stakeholders, which resulted in not having enough time to continue my design iteration on the issues that I've researched. If I have more time, I would love to continue looking into small details and further doing user testing not only with stakeholders but also the potential business partners.

I will also admit that when I first started the project I was only focused on the "bad" part and it distracted me from saving the good part for further iteration. If I have more time, I will definitely sort out the "good" ones and integrate them into my design solutions.



# Thank you!

Do you have any questions?

✦✦ Let's get connected ✦✦

