

The Process

In today's market, being able to make informed decisions about your business is a must in order to succeed. However, not everyone has a data scientist on staff who is capable of correctly interpreting mountains worth of data. It’s wonderful to have a large amount of data on your business, but what do you do with it? How do you use it? Are there trends/patterns? What is working vs not? Should we make changes to become more efficient or stay the course? Where do you even begin looking!?

We set out to build a tool that answers all of those questions and so much more.

Objective: Build a solution that allows merchants to leverage their business data in a simple, digestible, meaningful way and empowers them to make informed real-time decisions about their business.

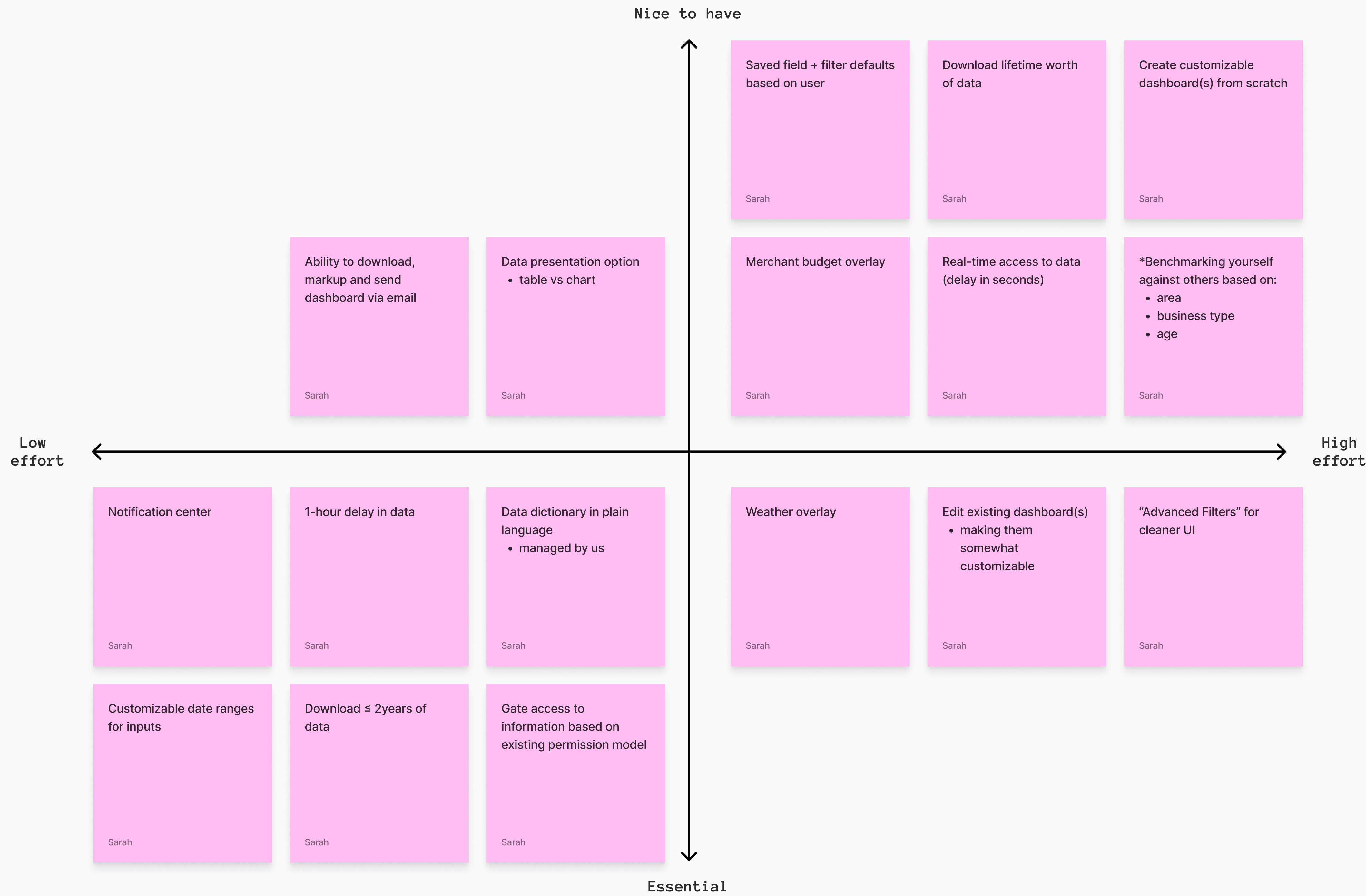
Personas

An exercise to map out and understand who the product will be used by and what they are trying to accomplish.

Tier	Phase	User needs	Owner	Director of Ops	GM	Taproom Manager	Finance	Marketing
		MAIN DASHBOARD						
-	1	How much money are we making today, this week, this month, this quarter and this year?	✓	✓				
\$	1	How am I doing against year to date goals?	✓	✓				
-	1	How am I doing against compared to last period/year?	✓	✓				
-	1	Are we looking healthy today/ this week/month in the taproom?	✓	✓	✓			
-	1	What am I spending on labor?	✓	✓	✓			
\$	1	How am I doing against others in the industry?	✓	✓				
-	1	What are my best selling items?	✓	✓	✓			

2x2 Matrix - defining functionality scope

A card sorting exercise: take all requested functionality and place it within the matrix. MVP should include all “essential” + “low effort” cards. Time and resourcing will determine if additional cards can be completed within the defined deadline.



The Process (continued)

Research/Documentation

Before initial design begins, research current industry trends/instances of what we’re trying to accomplish. This, paired with any documented feedback we may have on the intended feature, can be used to back design decisions later on.

Types of pay gates:

Page level

Something that blocks an entire page; uses placeholder to promote upgrade to get content/free trial (when applicable); the intent is to get people to upgrade

- “Upgrade” brings you to a page to set up method of payment
- “Learn More” brings you to a documentation page a bout feature

Feature specific

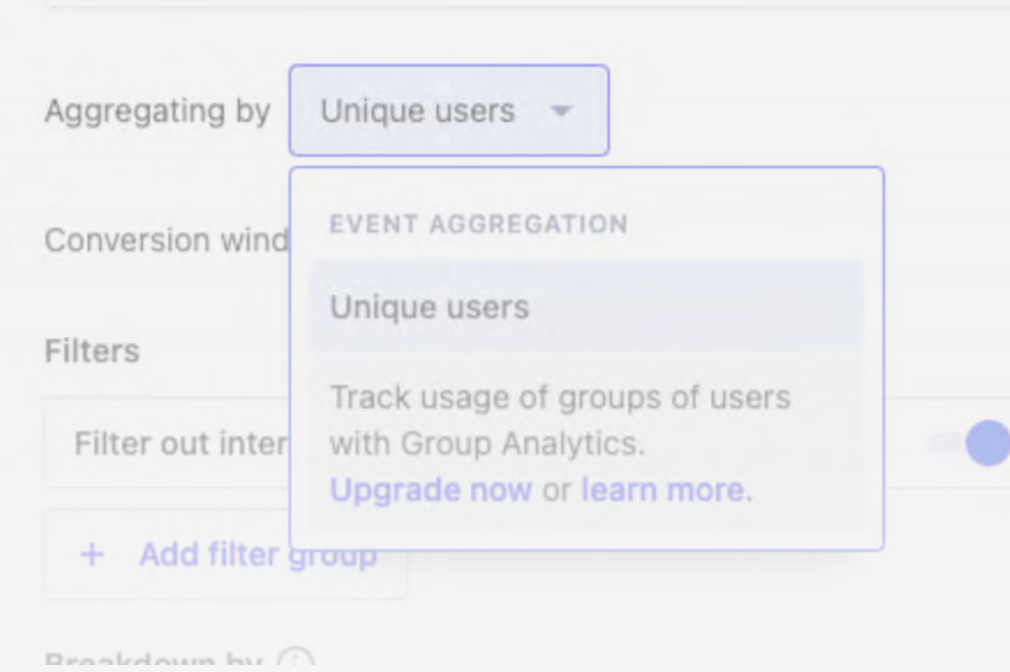
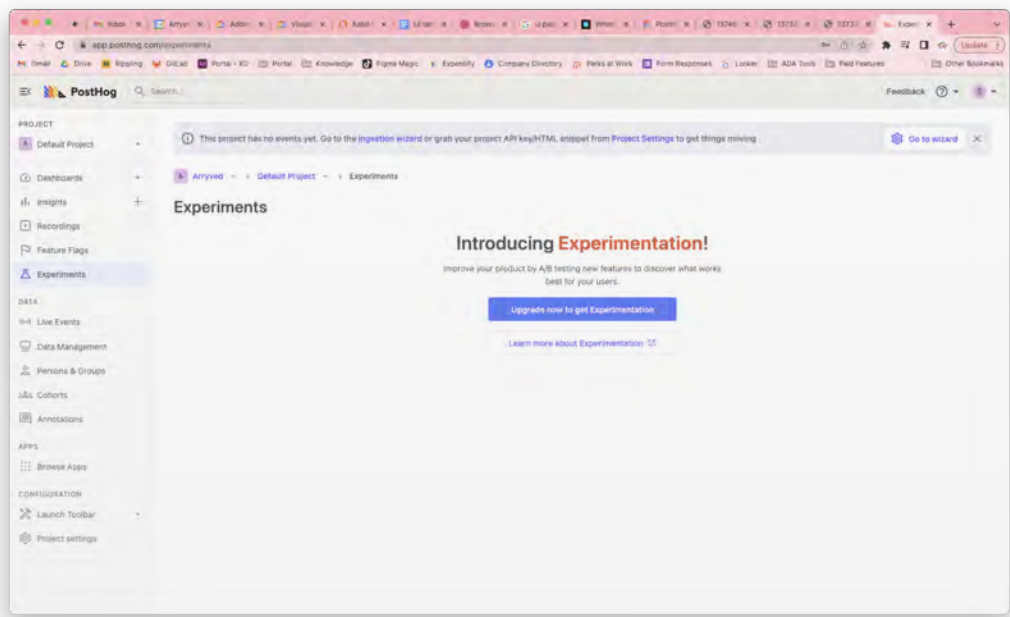
If a list of features are available with 1 or 2 behind the pay gate we should represent this somehow; this is informational while being minimally intrusive

Inline

Replaces the area where the paid feature would appear; making these dismissible for users who don’t plan on upgrading to receive the feature is a good practice; this should be useful for broader group if shown to all

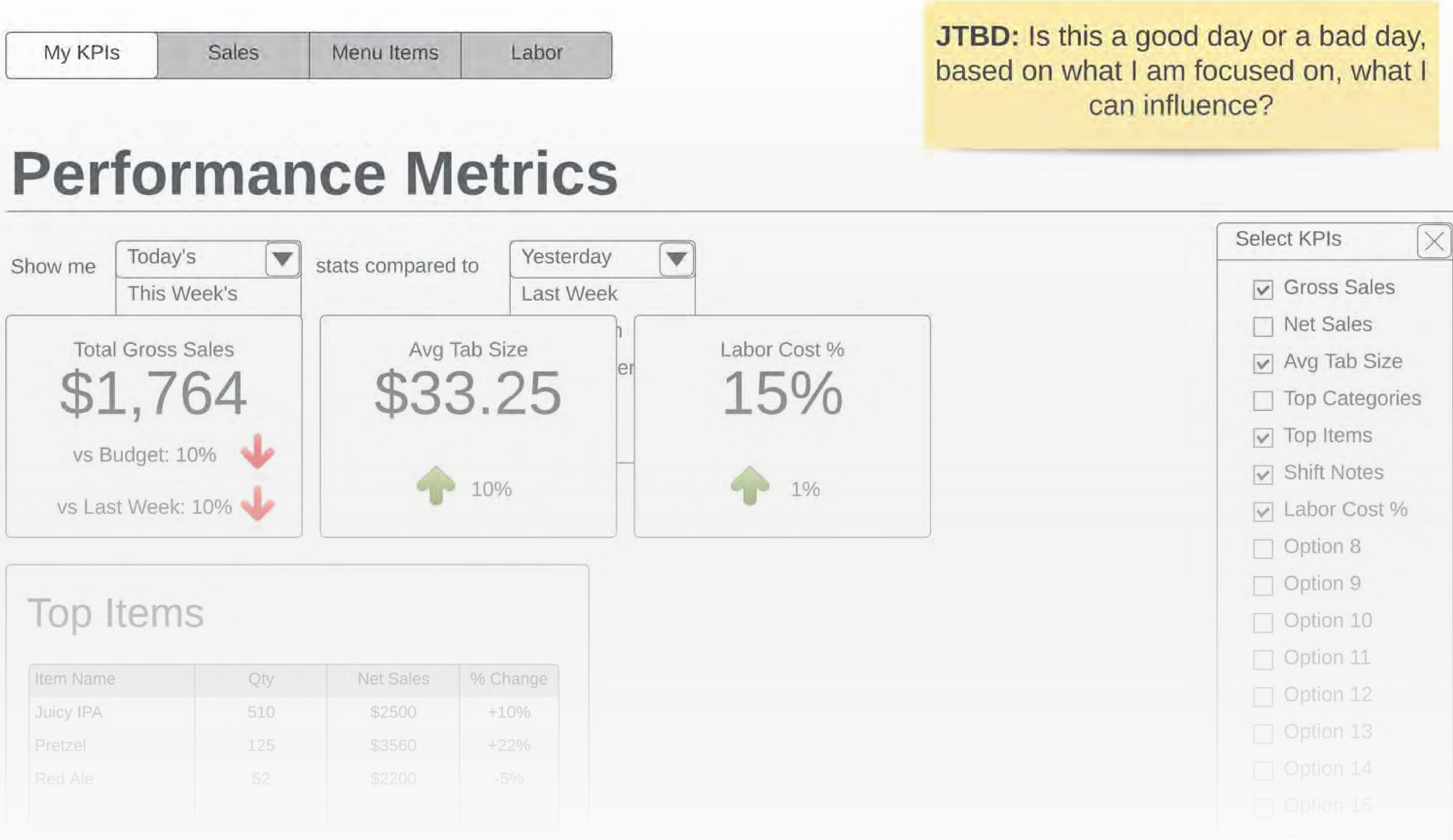
Other

Target specific users with feature info via different avenue (ie. email); this is meant to be informational without disrupting the workflow; this can also be for a small select audience depending on the feature being released



Wireframe

Kick off the design process with initial wireframing ideas.



The Process (continued)

Solution

Iterate on designs until all spec needs are met and we obtain approval from the Product Manager, ENG team and all other key stakeholders! Test our prototype with merchants and/or Alpha partners. We are now developer ready.

