



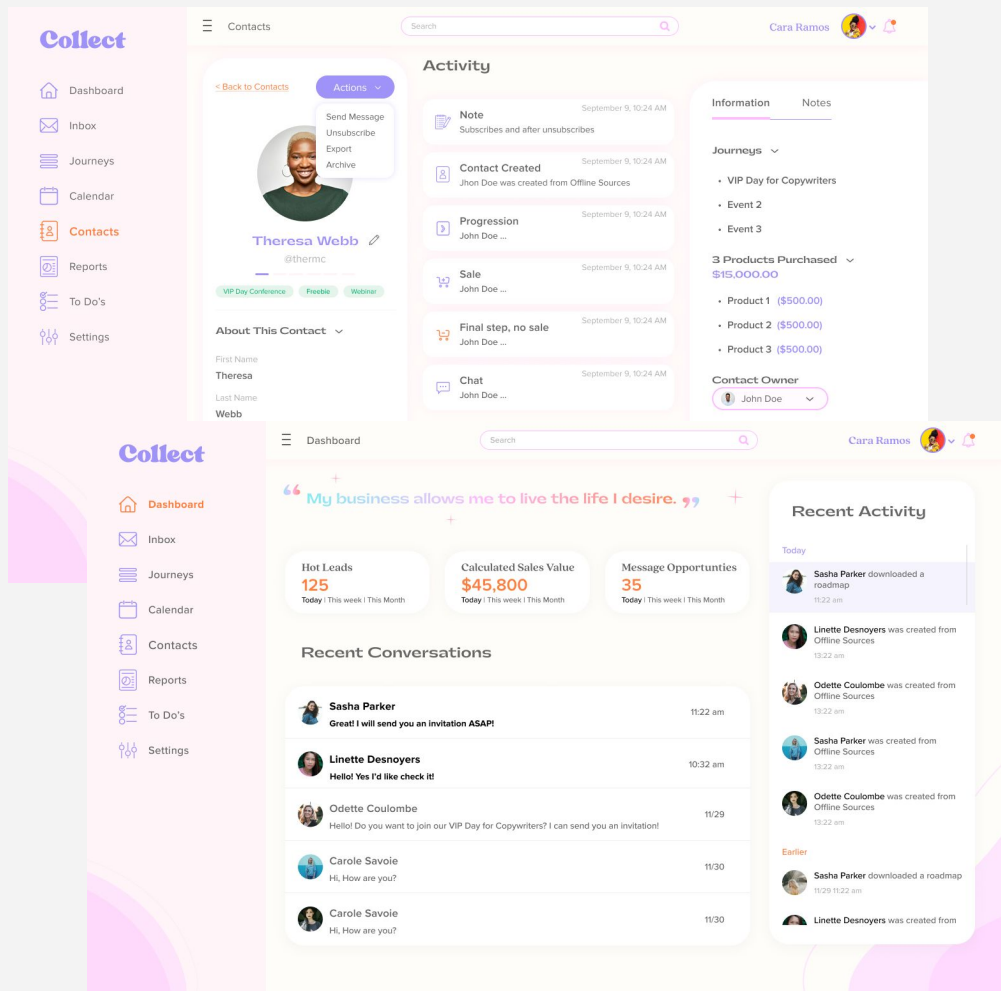
Collect CRM

How the client got 100+ lifetime license sales
without an MVP

the background

Collect is a CRM for social media content creators that provides a space to keep track of conversations and sales processes across different social media platforms.

The client approached us with the need to refine their concept before building out the web application.



Collect

Let's get started!

We'd love to learn more about you to better serve your needs.

What social media platform do you use?

Select one or multiple options.

- | | |
|--|--|
| <input checked="" type="checkbox"/> Facebook | <input type="checkbox"/> Instagram |
| <input type="checkbox"/> TikTok | <input checked="" type="checkbox"/> LinkedIn |

Next >

the challenge

Collect CRM needed to bring users' data from multiple social platforms and organize it in a way that would make sense to the users and match their established workflows.

the process

To help clients design the product that their customers loves, we followed our market-tested process:

Customer Interviews

Forcoda conducted 1-on-1 customer interviews to better understand users challenges, goals and the established processes that they used to sell on social media. We identified riskiest assumptions and verified that users have the need for product as well as desire and money to pay for it.

Competitor Research

We looked at the number of well-established sales CRMs and identified what worked well/what didn't work, and what best practices we could learn from them and apply to our design. Our goal was to keep CRM UI innovative yet familiar to the users for the maximum user adoption rate.

Dashboard

engagebay

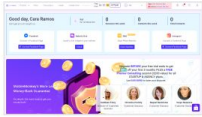


Dashboard of engagebay is clean. They use a good color combination purple and white.

User can reach almost any information just scrolling down, but not every time it works good.

Menu bar is located on a top of the screen. It's works but not good enough (better to use left sidebar). Menu is clear and intuitive.

mobilemonkey



Dashboard of mobilemonkey is not clean with many different elements on the screen which is confusing. Colors and all design looks bad.

User can't reach all information fast.

Menu bar is located on a top of the screen and doesn't work well and not intuitive, so users spend long time to find the function they want.

outplayhq



Dashboard of outplayhq is clear and have all that user needs on one screen.

User can search all information fast by scrolling down or make a click on left side menu bar.

Menu bar is visible, located on the left side, so user can reach any part of app in one or couple of clicks.

dubsado



Dashboard of dubsado is pretty clear but looks a little outdated. In one screen user can find all information they need.

User can reach any information just by scrolling down.

Menu bar is located on the left side which makes it easy for user to reach pages.

Search

engagebay



Search is located on a top bar and it's easy to find it. Also it's easy to work with.

mobilemonkey



This application has no search.

outplayhq



Search is located on the bottom of the left menu. Not easy to find it. Poor UX.

dubsado



Search is located on the top menu bar and everytime opened, so user can search anything anytime. Great UX.

Support

engagebay



Support is located on the left side of the screen and it's an error notification. The support button is not visible and easy for users time to find it.

mobilemonkey



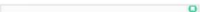
Support button is located in the right part of the screen but it is hard to find it because of all graphics on the screen with the same colors.

outplayhq



Support button is located on the left side of the screen on the menu bar. Its not color makes it visible and easy to find.

dubsado



Support button is located on the right side of the screen and have a green color which is the same color as another elements of the screen have. But position of the button makes it not very visible.

Tasks

COLLECT COMPETITOR BENCHMARKS

Characteristics	engagebay	mobilemonkey	outplayhq	dubsado	chattfuel	manychat
Easy to use	Good	Bad	Excellent	Good	Good	Excellent
Menu bar	Good	Good	Good	Good	Good	Good
Clear Dashboard	Good	Good	Good	Good	Good	Good
Modern design	Good	Good	Good	Good	Good	Good
Good UX	Good	Good	Good	Good	Good	Good
Usability	Good	Good	Good	Good	Good	Good
Load time	Good	Good	Good	Good	Good	Good
Mobile device support	Good	Good	Good	Good	Good	Good
Sharing information	Good	Good	Good	Good	Good	Good
Images	Good	Good	Good	Good	Good	Good
Filters	Good	Good	Good	Good	Good	Good
Calendar	Good	Good	Good	Good	Good	Good
Search	Good	Good	Good	Good	Good	Good
Onboarding	Good	Good	Good	Good	Good	Good
Journey	Good	Good	Good	Good	Good	Good
Tasks	Good	Good	Good	Good	Good	Good
Contacts	Good	Good	Good	Good	Good	Good
Reports	Good	Good	Good	Good	Good	Good
Inbox	Good	Good	Good	Good	Good	Good
User account	Good	Good	Good	Good	Good	Good

Excellent Good Satisfactory Poor Bad

Example of competitor research deliverables

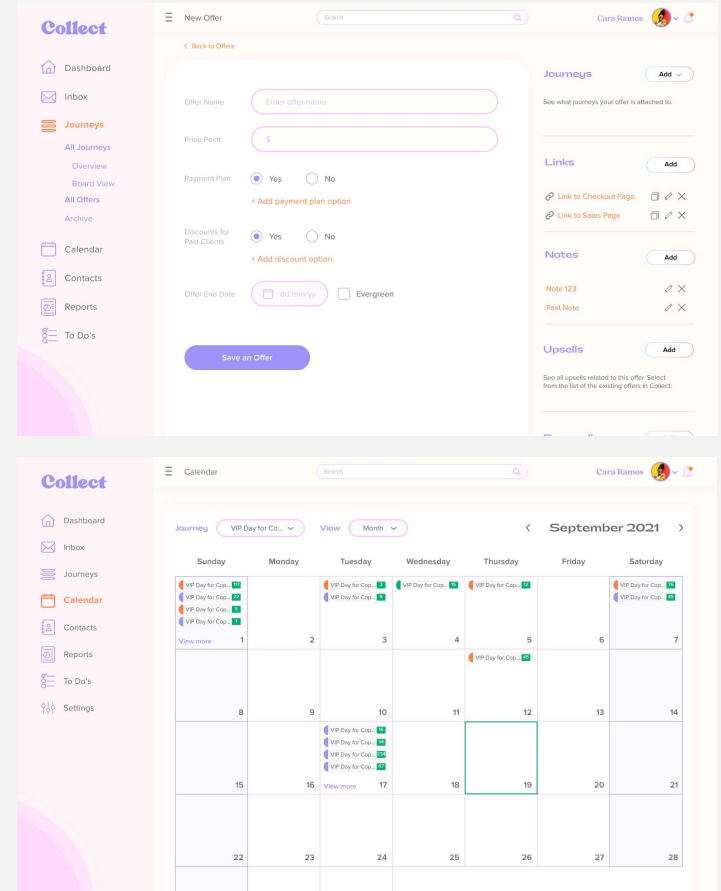
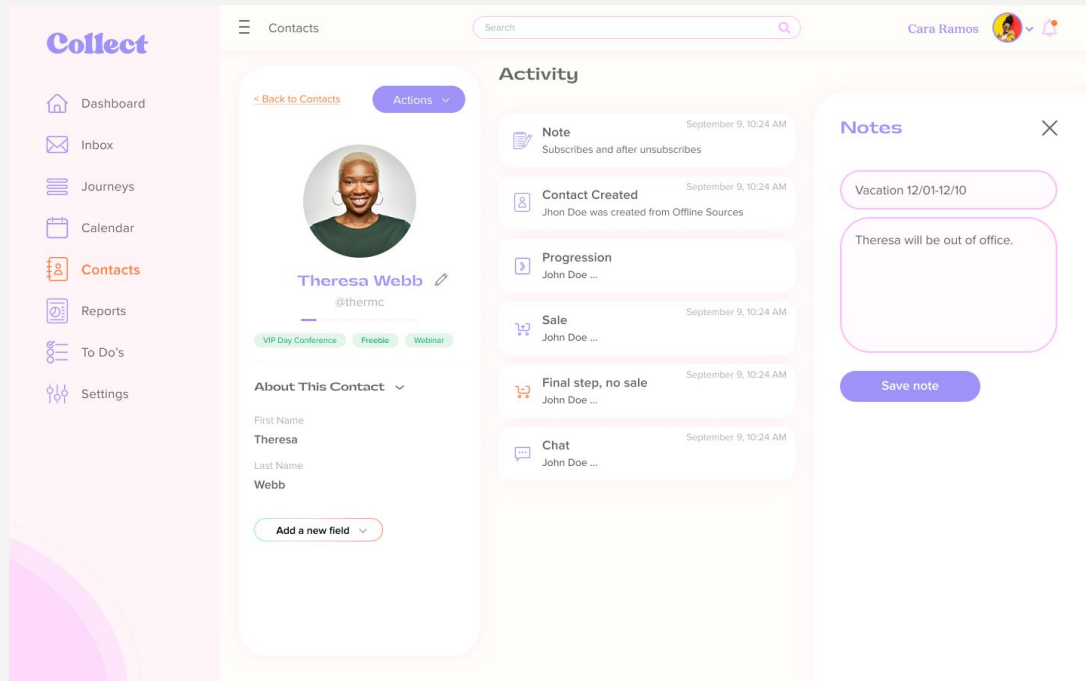
the process

UX/UI Design

Based on customer and market research insights, we created a product roadmap, wireframes, and broke down design deliverables into two-week sprints. This allowed us to move quickly through the list of features and deliver results to the customer without delay. At the end of each sprint, we produced a high-fidelity clickable prototype of new pages and features created in Figma.

User Testing

Once the design sprint was completed, we tested newly designed features with the users to receive immediate actionable feedback and further refine the designs.



Example of the screens

the process

Pre-Sales

Once the clickable prototype of Collect CRM was completed, client used it during their sales webinar to present a new product to their audience and sell the lifetime license to further validate the idea and solidify the concept.

Pre-sales webinar was a success! Client sold 100+ (over \$10,000) lifetime licenses and reinvest fund back into the product development.

the outcome

Collect CRM validated their product idea and got traction before their MVP was built.

The client is now finishing the work on their web application and adding the final touches before the official publish launch.

