



University of Wisconsin-Madison

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Project Report

Developing a Sales Workspace Design for CUNA Mutual

Project Sponsor
CUNA Mutual Group

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Executive Summary

The objective of this project was to help the CUNA Mutual Group (CMG) determine how to better support its field sales staff by providing an intranet access point designed to address the specific needs and usage patterns of the sales team. CUNA Mutual's existing intranet site is a heavily utilized resource containing information critical to the sales functions. However, it was obvious to the management team that the site was not optimally organized – critical content was made available via 'link farms', or intranet pages containing large numbers of links to related content, sorted alphabetically by name of the resource.

The student team was asked to perform a needs assessment based on two independent field sales roles – sales managers and Account Relationship Managers (ARM). Employees in these positions performed distinct tasks and were therefore likely to value different intranet content and display different usage patterns. Once the usage patterns and requirements of the two roles were gathered, the student team would design a separate intranet workspace for each.

Four interviews were conducted to establish a baseline understanding of usage patterns. The first two interviews were held with members of CMG headquarters staff. These individuals were in positions which either provided intranet content to the field or supported the field personnel directly. From these initial interviews the student team was able to garner initial impressions regarding critical content and areas which were problematic for the sales staff. The next step included interviewing a sales manager and an ARM via teleconference. These interviews addressed some of the issues that were raised by the initial interviewees but were intentionally open ended in an attempt to discern not only what existing content was critical, but what new functionality might be provided to improve their productivity.

The interviews provided the information necessary to create a survey instrument which was circulated to a wider sales audience. The survey consisted of 24 questions pertaining to background information, critical content determination, usage frequency, information delivery preferences, search capabilities and possible future enhancements. The questions were either multiple choice or free text. 42 members of the sales team were invited to participate. The response rate was 90% (38 respondents), due in part to an incentive program instituted by CMG.

Survey data was then broken down into roles and analyzed. A correlation analysis which compared the answers provided by the two roles was run. This analysis indicated that the differences between the usage patterns and desired functionality between the two roles were not statistically significant. Therefore, the student team proceeded to design a single workspace targeted for both sales managers and ARMs. The design was based on results which indicated that users strongly desired the ability to customize content, to keep track of the content that was referenced frequently, improved search capabilities, automatic delivery of communications and a means to track progress towards individual, division and corporate sales goals.

A workspace mock up was created that incorporated the design points indicated by the survey data. This workspace design was presented to the internal CMG project team, enhanced and then presented via teleconference to the members of the field sales team who participated in the survey. Feedback from this teleconference was subsequently incorporated to create the final proposed intranet workspace design.

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