

**EVENT SALESFORCE APP SETUP WIZARD  
EVALUATION AND ENHANCEMENTS**

A PROJECT REPORT

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OF

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IN  
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I, Samra Ansar, Roll No – 2K21/MDID/12, student of M.Des (Interaction Design), hereby declare that the project Dissertation titled “Cvent - Salesforce App Wizard Evaluation And Enhancements” which is submitted by me to the Department of Design, Delhi Technological University, Delhi in partial fulfillment of the requirement for the award of the degree of Master of Design, is original and not copied from any source without proper citation. This work has not previously formed the basis for the award of any Degree, Diploma Associateship, Fellowship, or other similar title or recognition.

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**CERTIFICATE**

I hereby certify that the Project Dissertation titled “Cvent - Salesforce App Wizard Evaluation and Enhancements” which is submitted by Samra Ansar, Roll No: 2K21/MDID/12, Department of Design, Delhi Technological University, Delhi in partial fulfillment of the requirement for the award of the degree of Master of Design, is a record of the project work carried out by the students under my supervision. To the best of my knowledge this work has not been submitted in part or full for any Degree or Diploma to this University or elsewhere.

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## ABSTRACT

Events happen for a reason. The reason could range from celebrations, to announcements, to creating awareness for a certain cause. Corporate events aim to engage its customers and employees while also attracting the interest of potential clients [41]. They are a means to promote a product or service, communicate business strategy, reward or motivate staff, and celebrate achievements amongst others. Out of a business's budget, 14% is allocated to event expenses, amongst which B2B marketing budgets take the largest portion [42]. Events, conferences and trade shows are huge expenses of any business. Hence it is crucial for businesses to understand the impact events have on them in terms of business opportunities, sales and revenue growth [43]. In order to understand whether an event is an investment, or merely an expense, measuring the ROI and success of events becomes important.

The effort of Event organizers and planners for creating an engaging event can be evaluated with the help of data [44]. After an Event, a lot of data is generated. This data can help businesses understand the correlation between their events and sales, accelerate sales pipelines, build a better and complete profile of attendees, as well as prove the impact and ROI of the event [25]. Cvent with their offerings of a comprehensive suite of solutions and products across the entire Event lifecycle helps businesses and planners in planning and promoting their event, engaging the attendees during the event, and following-up with the data after the Event. Cvent also integrates with other systems and software offerings to create a wholesome and complete experience for their users with extra features and functionality of the Cvent platform.

In this attempt, Cvent has integrated with Salesforce to create the Cvent Salesforce App. Salesforce is a leading CRM platform which helps businesses to manage customer and prospect relationships with the help of data. Salesforce can help Cvent planners to store, track, collate and analyze event attendee data in one central location, and share it with the respective stakeholders. It also has various other features which can help increase the efficiency of businesses. Therefore, with the Cvent Salesforce App, Planners can share Event data between Cvent and Salesforce. They can view all the Cvent events scheduled for their organization, see past activities of attendees, and invite and register prospects directly from the app. This can help businesses by minimizing time to action on event leads and building better customer profile. With the help of the Cvent Salesforce App, businesses can Increase attendance to their

Events, Accelerate the sales pipelines, and most importantly measure the success and ROI of their events.

In order to start using the Cvent Salesforce App, Planners have to purchase the Cvent Salesforce App license, define business requirements and set up and configure their account. Amongst these steps, Account Set up in Cvent was done by the Cvent Administrator and Set up and configuration in salesforce was done by the Salesforce Administrators, using the Documentation on the Developer hub. This documentation had detailed information about the setup process, but was highly instructional with lots of data and nested tabs, which were difficult to understand and follow through for both the Administrators. The Setup process also had a lot of steps on the Salesforce Sides, so the Administrators had to switch tabs, understand the documentation and do the steps, going back and forth. Difficulty in completing the setups, made the admins reach out to the support teams. In order to reduce the dependency on Support teams and make the setup process simple and easier for the Salesforce Administrators, The Cvent Salesforce App Setup Wizard was deployed. The wizard simplified the setup process by converting complicated tasks into smaller and manageable ones, with important information and descriptions. The aim was to make the setup process easier and simpler for Administrators to be self-sufficient and reduce dependencies. This thesis project is evaluating the recently deployed Setup wizard and recommending design enhancements. The project has been completed over a period of 13 weeks, following the Design Thinking methodology of Understanding the Product and Problem space with the help of Primary and Secondary Research, followed by Defining the User cases and areas of opportunities, followed by Ideations, brainstorming and Creation of Low to high fidelity prototypes, and ending with Testing.

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# CHAPTER 1 INTRODUCTION

## 1.1 EVENTS

Social gathering, parties, meetings, conferences, weddings, concerts, exhibitions, meet-ups and so on are terms we come across often in today's time. The one umbrella term which covers them all is the term Event. As per the Britannica Dictionary, an event can be defined as "something (especially something important or notable) that happens" and "a planned occasion or activity". Events create an opportunity for human interaction. They aid in celebration, innovation, creativity, knowledge sharing, experience diversity and cultural variation, while also catering to the sole purpose of the Event occurrence or agenda.

History books and articles are proof that Events have been in existence for centuries now. The very first events known to mankind were the Elaborate and Lavish meetings hosted by Cleopatra, the active ruler of the Ptolemaic Kingdom of Egypt. With limited communication, messages were hand delivered over periods of weeks, sometimes months, with help and assistance from her servants and free laborers. The tradition of events continued ever since, with Elaborate Events with themes and famous musicians being hosted by the Medieval French Royalty. The event management and planning responsibilities were taken by the rich aristocratic women, then. With the industrial revolution, the power of hosting and organizing events shifted from the rich and royals, to the common man. [1] The scope of event planning boomed with the invention of the steam engine which eased the task of transportation, travel and communication.

Events, as one thinks of it, were always conducted in-person. In- person events are a great way of communication and relationship-building. But the Event Industry came to a halt as the Covid-19 pandemic hit the world. This situation gave rise to the idea of Virtual Events. As the industry adapted to what came before it, technological advancements were utilized to bring

forward a new type of events. Virtual events enabled conferences and meetings to be held, streamed and broadcasted remotely. It had its own benefits by being flexible, providing detailed analytics, reducing travel costs and being eco-friendly. The approach after the pandemic, was combining the idea of in-person and virtual events, and thus Hybrid events came into existence. Hybrid events allow attendees to experience events as per their convenience, thus reaping the benefits of both [2].

Events can be organized for innumerable purposes and at various scales. The classification of events ranges from “Planned and Unplanned” events to “Sponsored and unsponsored events”. Looking at the broad level classification, Events can be based on Size and Types. On the basis of size and scale, events can be categorized into Mega Events (Enormous Events that affect Economies, like the FIFA World Cup), Hallmark Events (Events identified by the spirit of the town or city, like the La Tomatina festival in Spain), Major Events (Events capable of attracting media coverage, significant number of attendees and have economic benefits as well, like the IIFA Award shows), and Special Events (Events of a smaller scale at local or regional level, like a food festival) [3]. In terms of the purpose of Events, there are three broad categories, Private, Corporate and Charity Events. Private Events are mostly invitation only events which are not open to the general public and are not advertised. Birthday parties, weddings, Anniversary celebrations, private dinners, festival gatherings etc. are all examples of private events. Corporate events on the other hand focus on business and customers. The main purpose of such events is to communicate business strategy, promote a product or service, reward or motivate staff, and celebrate achievements amongst others. Lastly, Charity events focus on philanthropic work, such as raising funds, spreading awareness for a specific cause etc. [4] This paper is centered on Corporate Events, the planning, management and post event analysis of corporate events. As the frequency of events across the globe increases, the event industry is also booming and is expected to witness immense growth in the coming years [5]. Based on a report by Allied Market Research, the Global Event Industry is projected to have a significant growth and register a Compound Annual Growth Rate (CGAR) of 11.2% from 2021 to 2028. In 2019, the event industry was valued at \$1,135.4 billion. By 2028, it is expected to reach \$1,552.9 billion [6]

## **1.2 CVENT**

The success of any event depends on the planning and execution of that event. Event planning

is defined as the process of planning the details and logistics of an event. Event planning and management is a complex process, which becomes even more complex and overwhelming as the scale of the event increases. The many steps involved in the planning of an event cover budgeting, location, agenda, type of event, F&B, advertisement, marketing, attendee list, invites etc. Since it's not a one-person job, there are many stakeholders involved and the tasks and responsibilities of the various stages of the event cycle are divided amongst them. This also requires excellent coordination and communication, as teamwork plays an important role here.

Tapping into the Event planning and management sector, Cvent offers software solutions to planners which makes the process of planning streamlined and smooth. Cvent is a leading meetings, events, and hospitality technology company, offering a comprehensive suite of solutions that automate and simplify the entire event management process thus maximizing the impact of events [7]. The company provides software solutions for every type of corporate event, be it conferences, trade shows & exhibitions, workshops & training events, VIP & Leadership events, Roundtables & Summits or Networking events. The Cvent Event management software helps planners to automate the entire planning process. The products are divided into three main categories, Event marketing and management solutions, exchange solutions and Supplier and Venue Solutions. The project and this report focus on one of the products in the Event Marketing and management solutions section.

The different stages of an event life cycle at Cvent are planning, promoting, engaging and follow-up. There are different solutions and products which focus on each of the planning stages. These help the planner to find venues, manage speakers and exhibitors, create personalized websites, automate invites, streamline the on-site experience, create mobile apps, provide integrated and branded event experience, track expenditure, collect event information, capture attendee journey, collect feedback and data, integrate with other SaaS Solutions etc.

The successful completion of any event generates crucial event data which captures insights across the entire attendee journey. The planners can thus create better event reports and share them with stakeholders, understand the engagement of their attendees and get real time insights. Understanding and analyzing this data helps planners to gauge the success of their events, follow-up with leads, and build a more complete profile of their attendees. The captured

attendee data helps planners identify areas of improvement. Cvent with its integration with other software solutions, also offers planners the opportunity to integrate event and attendee data with CRM, marketing automation and other business systems. This accelerates follow-up with attendees, enhances lead conversion, generates a sales pipeline and proves the event ROI.

### **1.3 PROJECT BRIEF**

The brief for this project consisted of a brief overview of the project, expected deliverables, list of SMEs (Subject Matter Experts) and links to few resources.

The title of the project is:

**“Evaluate the Cvent-Salesforce app setup wizard and recommend future design enhancements”**

Based on the resources and project download given by the SME it was known that, The Cvent-Salesforce app is an integration between Cvent and Salesforce, which works on the salesforce platform. The app allows planners to sync data between the two platforms. It helps to generate and follow up on potential leads, drive more attendance to live events, enables sales teams to invite and follow up with prospects, enrich sales attribution and understand the contacts better with past history. It also allows marketing and sales executives to automate tasks and follow up based on event registrations, attendance, appointments, feedback, badge scans etc.

In order to use the Cvent Salesforce App, the app first needs to be set up and configured to establish the connection between Cvent and Salesforce. As a part of the recent enhancements to the app, a Setup Wizard was deployed to reduce the dependency on Support Teams and ease the process of setting up the App. The Wizard was not yet launched during the course of this project. The project studies the Cvent- Salesforce App setup and the newly deployed Wizard and aims to propose design enhancements that can add to the user experience of the App.

### **1.4 PROJECT METHODOLOGY**

The brief and the overview informed a very vague understanding of the product. Developing an understanding of the very basics was imperative to deep dive and understand the complexity of this project. The UX Design Thinking process was adapted for the project along with Lean

UX principles of MVP, Learning Loops and Exploration, Ideation and Rapid hypothesis validation. Lean UX is focused on gaining early feedback and creating quick iterations based on the feedback [8]. The project is driven by an intent to improve the existing product in terms of the User experience.

The Design process and Methodology followed throughout the project lifecycle is divided into four phases as mentioned below:

- Discover Phase
- Define Phase
- Ideate Phase
- Develop and Test

#### **1.4.1 Discover Phase**

In order to develop an understanding of the various aspects of Event planning and management, Cvent, Integrations, Salesforce, and the Cvent salesforce app setup wizard, a thorough literature review (secondary research) was done. This was done to set the base for the further working of the project.

The process of 5W's and 1H was used for each area of focus, which helped in understanding the business goals, Product Needs and goals deeply. The Initial discovery was done through the company's resources, Desk research from past meeting recordings, internet research, and self-exploration of the product.

- The literature review started with the very basics of what the event industry is and what is Cvent's role. This understanding was essential for working on a product which revolved around Events and was used at some point in the event lifecycle.
- Moving further, learning about what happens post an event and how the data is helpful to the planners was essential in understanding why integrations exist and what Cvent's Integration with salesforce does, from the business and the user's point of view.
- The next step was to understand the functionality of the product, Cvent Salesforce App. Self-exploration of the product and documentation of the current user flow and screen mapping was done. This helped to empathize with the users and understand the need for the product enhancements, gain insights and build a hypothesis for further research.

- Constant discussions and hypothesis validation with the SME were done at every stage to validate the understanding of the product and project, as a lot of technicalities were involved in the product.

Through the literature review and desk research, the need for Primary research was identified. The Setup wizard was not yet launched and no existing data on the user's experience related to the setup process existed.

- The method of Heuristic Evaluation, following Jakob Nielsen's 10 general principles for interaction design, was adopted for the evaluation of the existing product [9].

#### **1.4.2 Define Phase**

The insights from the Heuristic Evaluation and Self-discovery of the product shed light on some major UX limitations in the current product. In this phase of the UX design process, all the data and information were converged to identify actionable pain points which had the most impact on the user's journey and overall product experience.

- The Heuristic Evaluation findings were sorted using Affinity Mapping and were validated with the SME. These findings were then divided into UX limitations, Technical Limitations and Decisions made by the PM (Project Manager).
- The UX limitations were further sorted into areas of focus like Navigation, Feedback, visual design etc. through Affinity Mapping which helped in identifying which areas would have the most impact for an MVP.
- Since there was no persona for our user, a proto persona based on collected data and further research was created.
- A list of pain and pleasure points was devised, and impact analysis was done to identify the most impactful areas and a problem statement was created.

#### **1.4.3 Ideate Phase**

In this phase, Various design concept sketches using UX design principles were created catering to the identified impactful pain points. The process of quick feedback and quick iterations was used, to improve the designs with every iteration.



- The concept sketches were hand drawn paper prototypes. Upon feedback with the UX team and product designers, multiple iterations were done to explore more ideas.
- Mid-fidelity prototypes were created and Dot-voting and Hallway Testing was done to identify the most viable solution which could be sent for testing.

#### **1.4.4 Develop and Test Phase**

A high-fidelity prototype of the MVP based on the feedback and Dot-voting method was created for Concept Testing with the Project Manager, and other stakeholders of the Cvent Team.

- A series of questions for the concept testing focusing on the pain points and solution areas were created.
- The results and feedback from the concept testing will be used for further iterations in the future. The iterative process will continue till the most viable solution for implementation and development is created.

The time span for the project and the various design phases was three months, from Feb 2023 to April 2023. The details of the steps in each phase are mentioned in the following chapter.

## **CHAPTER 2 DESIGN PROCESS**

### **2.1 DISCOVER**

The Discovery phase sets a solid foundation for a digital product [10]. It involves understanding the users, understanding the problem to be solved and the opportunities, and establishing a shared vision for the product [11]. This phase was dedicated to exploring the business needs and product and problem space in depth. The goal was to have a strong understanding of:

- The Cvent Event Lifecycle
- The role of Salesforce as a CRM platform in the Event Lifecycle
- The business need of an integration of the two platforms (Cvent salesforce App)
- The working of this integration (Cvent salesforce App)
- The problem with the setup of this Integration app (Cvent Salesforce App Setup)
- The need for a Setup Wizard
- The User Personas
- Probable opportunity areas in the current product

The discovery was done by the means of literature reviews, desk research and primary research, along with discussions with the SME and project mentors. For the Secondary research, existing Internal Cvent documents, Company websites, past internal product videos and other internet sources such as articles and websites were referred.

### **2.1.1 Understanding Business Needs**

#### **Event Planning and the Event Lifecycle**

Event planning is the process of putting together an event. It is a part of the larger event management umbrella. Event management is the process of creating and maintaining an event, which spans from the very beginning of planning all the way to post-event strategizing [12] [13]. Planner is the business or company that is hosting the event for a certain purpose.

In Cvent, an event throughout its lifecycle, from planning till post-event strategizing can be broadly divided into four categories:

1. Building and planning the perfect Event
2. Promotion Across various channels before the Event
3. Execution and Managing Attendee Information and Communication during the Event
4. Measuring success to prove Event ROI post the event

The focus of this project and the product is on the last part of the Event lifecycle, which is Measuring success to prove Event ROI post the event.

#### **Defining the Business Value of Events**

Events offer an unparalleled opportunity for collaboration, education and networking for the attendees [14]. But Events are mostly considered to be an expense, rather than an investment to achieve a certain business goal. However, the ROI method of measurement of the value of an event is changing this perspective. The objective of any corporate event is to have a profit [15]. This profit may or may not be monetary, depending upon the purpose and agenda of the event. It can be showcased in terms of:

- Increased sales
- New leads generation
- Better understanding of customers
- Direct Marketing
- Revenue from registration and/or sponsorship
- Attendee count, feedback and satisfaction

Worldwide more than \$500 billion are spent on events every year. And about 21% of the corporate marketing budget is dedicated to Hosting, attending and exhibiting at events. This makes the measurement of event success imperative for business value. With the help of post

event analytics and ROI measurement tools, companies and businesses can figure out the role of meetings and events for the business strategy [15].

### **Post Event Data**

For a planner (business), an event is never really over, even though it may have come to end. During the Event, attendee interaction and engagement through various methods leads to the collection of a lot of quantitative and qualitative data. The bigger the event, the larger the data collected. So, Post event, a planner has a vast amount of collected data, which can be converted into actionable insights, which can in turn help measure the success of the event. This data can help a planner:

- Understand the attendees needs and interests across all major touch points of the attendees' journey
- Understand the correlation between Event and Sales pipeline
- Prove the impact of the event and event ROI
- Accelerate follow-up on the sales pipeline.

But for all of the above-mentioned actions to happen, the attendee data collected post the event has to be shared with the respective stakeholders. These stakeholders are the Sales, Marketing, Finance and Decision-making teams of the planner's organization. The stakeholders are also required to share data and information amongst themselves as well, as data silos are not beneficial for smooth functioning of any business [17]. The collected data in its current state is unsorted, complicated and isolated, consisting of thousands of emails, spreadsheets, documents etc., all prone to human error. It is very difficult to comprehend and sort this data for an event of the corporate scale. Manual sorting of this magnitude of data can be extremely time consuming and can take up to a few months. By the time the sorted data is shared with the stakeholders, it can be outdated and of not much use. Therefore, for actions to be taken on the data collected during an event, the data needs to be sorted, cleansed and collated and shared with the relevant stakeholders at the earliest possible.

### **Understanding the Business need of Cvent Integrations**

Any business or organization needs different software that offer different functionalities and areas of expertise. Since one software solution cannot meet every need of a business or organization as a user, Integrations come into existence as they bridge the gap between different software solutions that any organization could need. HubSpot defines Integrations as

connections between software systems, which enables them to share data from one system to the other which provides the users with more features and options while using one software [19]. With the help of integrations, different business solutions and systems can connect to each other, and interact and share information [20]. As organizations grow and function, so do their business needs for new softwares. Integrations simplify an organization's software needs, by enabling them to enhance the software or system they are using and get added features and functionalities. For example, one can enhance the functionality of an old TV by connecting it with a Laptop with an HDMI cable to watch Netflix on TV, instead of purchasing a smart TV. These integrations are usually built on APIs (Application programming interfaces) [20].

Events will be able to serve critical business functions of educating and enhancing customer base, enhancing brand value, driving leads and generating revenue, much better and faster with the adoption of technological solutions or softwares [21]. The data collected during an event will remain in silos- cluttered, isolated and difficult to act upon, unless it is manually sorted, scanned, scrubbed and shared with stakeholders in time to act upon it. With the help of technology, this process can be made simple, fast and efficient, with no errors, so that planners, marketers and sales professionals can convert leads into customers.

A planner using the Cvent Event software can successfully plan, promote, engage and execute an event. However, when it comes to post event data sorting, sharing, analysis and sales actions, a CRM platform such as salesforce is required. If a planner were to use Salesforce and Cvent as different systems, it would have added an additional task of downloading data and information from one system and uploading it to the another. This is where the Cvent Integrations come and play a critical role in making Cvent a unified platform in which all softwares works together seamlessly.

Cvent, with the help of API and Webhooks options, can integrate with any web-based program and allow event data to flow seamlessly between Cvent and the critical SaaS solutions one uses every day. Therefore, any software solution or system, from marketing automation tools and expense tracking softwares, to CRM systems can be integrated with Cvent to ensure seamless data flow [21]. Fig 2.1 shows the CRM system that Cvent has integrated with. The planner can choose to use any of these available integrations.



Fig. 2.1 Cvent Integrations with Different CRM Systems [21]

Cvent Integrations makes events better for businesses by:

1. Helping businesses build complete profiles of their customers and prospects
2. Increasing and funneling follow-up by targeting the prospective leads
3. Accelerating revenue pipeline by improving customer and prospects engagement
4. Saving time and improving accuracy by eliminating manual data entry
5. Making measuring ROI, total cost and impact easy

This thesis studies Cvent's integration with Salesforce, called the Cvent Salesforce App, which provides seamless information exchange between the event management software and the CRM software.

### Understanding Salesforce

Salesforce is a CRM platform. CRM stands for Customer Relationship Management, which is a technology that manages a company's relationship with their customers and potential customers, in order to improve business relationships and foster business growth. With the help of CRM systems, planners (businesses) can stay connected to their customers (attendees) and improve profitability by streamlining workflow. CRM tools enable managing customer relationships across the entire customer lifecycle, from finding new customers through

marketing, winning customer's business through successful sales, to providing support and additional services through digital commerce and customer service interaction [16].

Salesforce helps businesses (planners) to use customer data to build long lasting customer relationships and grow their business, by helping them be efficient and effective. The Salesforce CRM software diminishes technology silos between departments and various stakeholders of a business.

Following are the six ways in which Salesforce as a CRM software benefits business:

- **Trustworthy Reporting:** Customer Data from any source is not useful unless its cleaned, sorted, analyzed and made actionable. With Salesforce, businesses can collate, tabulate and organize that data to make it more interpretable. Usable and actionable data helps in various other benefits as well, such as running reports which can help identify opportunities and depict how the business is dealing with its customers and leads.
- **Dashboards that visually showcase data:** Salesforces eradicates the task of manual effort of import and export of data via spreadsheets, its analysis and interpretation and then digitalization. It helps by creating customized dashboards, which showcase the metrics and most important information, for every individual in the organization.
- **More Personalized outreach with Automation:** Using the data about customers, market and the industry, Salesforce offers businesses to send out automated emails and communications to their customers.
- **Proactive Service:** The ability of CRM software to automate processes allows your company to boost productivity. Through this feature, teams receive insights and real-time data that increases productivity, hasten collaboration, and help teams concentrate on their most valuable tasks.
- **Efficiency enhanced with automation:** Automation reduces manual effort and thus adds to efficiency. For example, by harnessing the power of Artificial Intelligence in CRM softwares, Leads can be scored based on the marketing qualification, and qualified leads can be efficiently converted into sales. Also, chatbots and automated messages can tackle simple customer queries.
- **Simplified Collaboration:** Different teams like sales, marketing and customer service can work together seamlessly as the data and information is no longer in silos and is

shared with each team member of every team. The data consisting of conversations, interactions, notes and customer information is always up to date and can be referred to at any time [18].

There are a few terms specific to Salesforce, that will be mentioned in the following sections. These terms are mentioned below:

- **Lead:** An unqualified name of an individual or company
- **Account:** A company or organization that contains multiple contacts or opportunities
- **Contact:** An individual who has been qualified as a potential customer
- **Opportunity:** A lead that has committed to making a purchase from your company
- **Campaigns:** A Salesforce Campaign is a group of Leads and Contacts exposed to specific marketing communication(s).

## 2.1.2 Understanding Product Needs and Goals

### Introduction to Cvent Salesforce App

Cvent Salesforce App is an Integration between Cvent as an event management software and Salesforce as a CRM software. It is a managed app on Salesforce platform that will provide access to Cvent events and data. Cvent's Salesforce Integration enables every activity of an attendee to automatically reflect in Salesforce. This empowers the sales and marketing teams of the planner's organization or business to become key drivers of the event's success.

The Cvent Salesforce App can help businesses by:

- **Increasing Event attendance with the right Attendees:**

The app provides access to Cvent events directly on the salesforce platform through which the teams can invite and register the prospects and customers easily. There are various features in the App, one of which is Nominations. Nominations enable businesses to stay in control of the invitees by requiring an approval for certain events before any invitation or registration is sent. This helps to funnel the right kind of attendees of any event hosted by the business. As the most qualified attendees are invited, the business can convert more leads into sales, and thus grow. Planning Teams can also view the status of each attendee from a contact's record and can also modify and cancel any attendee's registration.



- **Accelerating Sales Pipelines:**

A Contacts (potential customers) journey at past events gives strong indications about their interest and willingness to buy. This rich and valuable data about Contacts can help the sales teams conduct more effective conversations with prospects and customers. Thus, when Salesforce campaigns are linked with Cvent events, the status of prospects and customers who are members of a particular Salesforce campaign is automatically updated. As a result, tasks are automatically created for time-sensitive follow ups which help in faster and more effective sales conversions.

- **Understanding Event Impact and ROI**

Every planner wants to know how successful the event they just hosted was and how it affected the business. With the Cvent Salesforce App, Planners can connect Cvent events to Salesforce opportunities, campaigns, activities and other reports. They can also show the successfully closed sales and new leads coming from events to all stakeholders, thus measuring the Event's impact and ROI. [22]

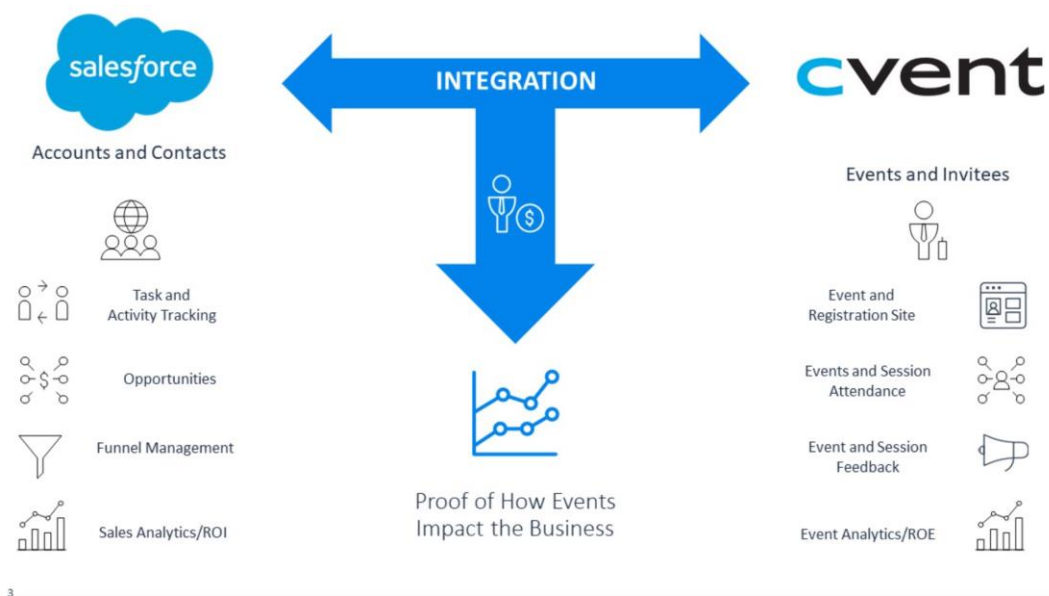


Fig. 2.2 Working of the Cvent Salesforce Integration (Source: Cvent)

Fig. 2.3., details the business story for the Cvent Salesforce App which led to the feature development of this app. Business stories can be defined as manifestations of business goals for documentation purposes which can be referred to focus on the end goals [23].

## Business Stories

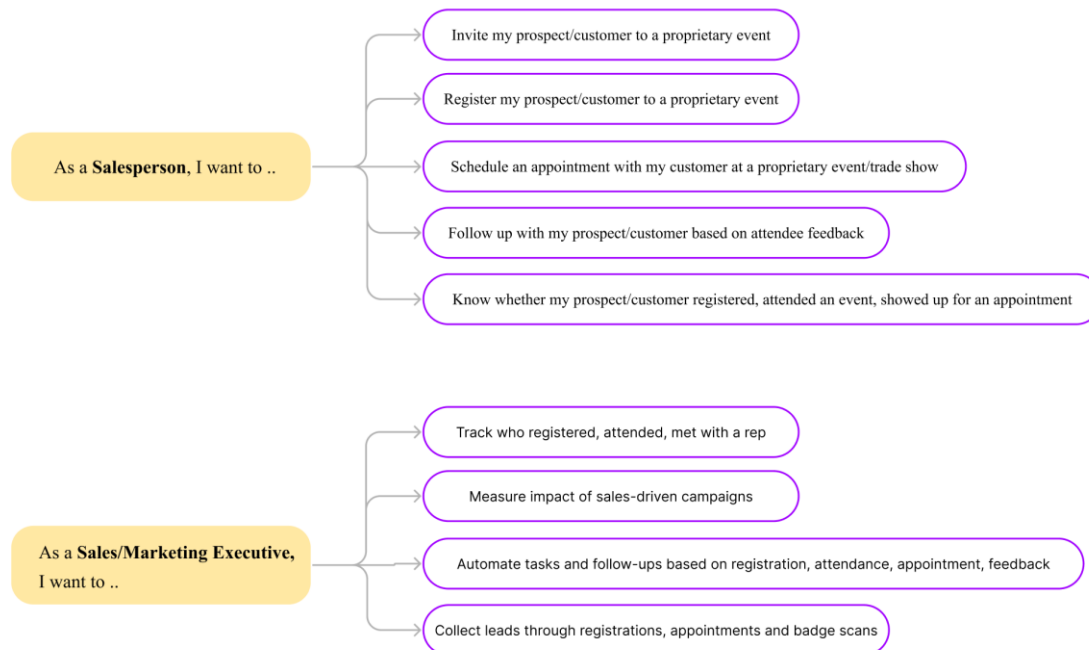


Fig. 2.3 Business Stories for the Salesforce and Cvent

The Cvent salesforce App license purchased by the planner defines the availability of the various features they can have access to. There are 3 types of licenses available: Data, Standard and Premium. The planner can select the one which aligns with their business needs. The various features of the app are mentioned in Fig 2.4.



Fig. 2.4 Features of the Cvent Salesforce App

### Personas using the Cvent Salesforce App

The Cvent salesforce app is used by different teams and individuals of an organization. These are: Sales Users, Salesforce Admin, Event Planner and Sales/ Marketing Ops. The tasks and features available to these personas are mentioned below:

#### Sales User:

- View upcoming Cvent events

- Register on behalf of client/prospect
- Invite for an event
- Nominate for an event
- Set up appointments for events hosting or attending (trade shows)
- View attendee journey for past events

#### Admin:

- Install and configure the Cvent Events app in Salesforce org
- Connect Salesforce and Cvent account and define field mappings to match the two systems
- Define event visibility based on sales user profile
- Setup nomination approval process
- Define data retention and sync frequencies

#### Event Planner:

- For individual events, define permissions for sales users to be able to view an event, send invitations, allow registrations, require nominations

#### Sales/Marketing Ops:

- Define workflows to manage campaigns, create opportunities and tasks based on Cvent data – registration, attendance, feedback, badge scans
- Sync Cvent event and session data to Salesforce campaigns or custom objects, to consolidate all organizational events (including non-Cvent events)
- View reports on the data synced from Cvent [25].

### **The Working of the App**

Cvent salesforce App is native on the Salesforce platform and has to be configured and set up before the Sales, Marketing and other teams can start using it. This is done in five levels:

1. Purchasing the App license
2. Defining Business requirements
3. Setup in Cvent by the Cvent Administrator
4. Configuration in Salesforce by the Salesforce Administrator
5. Using the Cvent Salesforce App

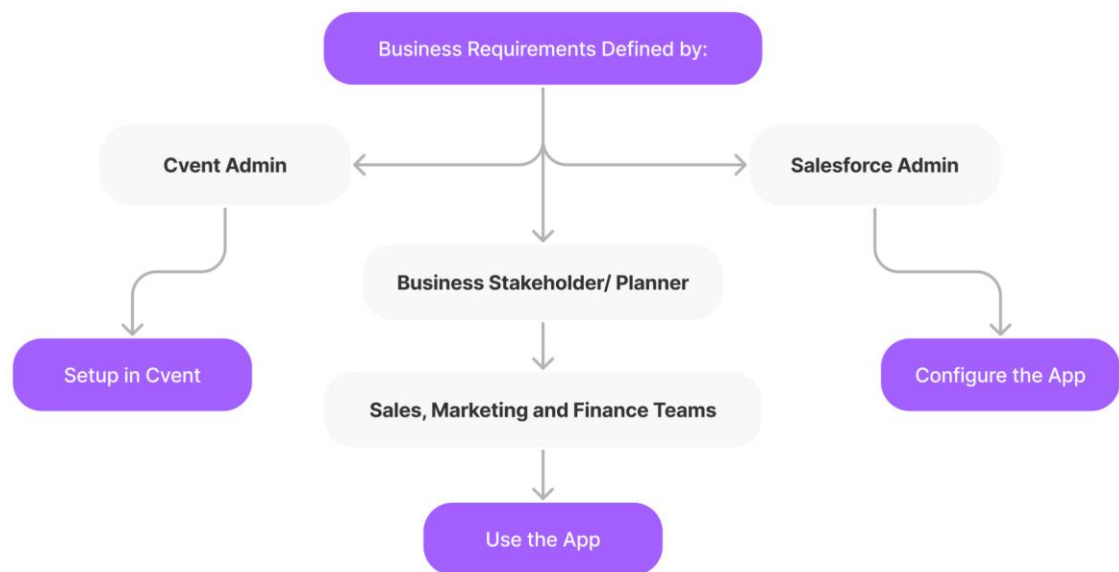


Fig. 2.5 Working of the Cvent Salesforce App

### Purchase the App license

The App license for the Cvent Salesforce App can be purchased from the Salesforce or Cvent App exchange.

### Define Business requirements

Cvent Salesforce App offers full customization capabilities that can be set by the business stakeholders. After purchasing the App license and before setting up and configuring the app, these business requirements need to be defined by the Business Stakeholders, Cvent Administrator and Salesforce Administrator (Fig. 2.5). These business requirements form the steps of the setup process will be detailed in the sections ahead.

### Setup in Cvent

Once the business requirements are defined, the App needs to be set up and enabled on the Cvent Event Software by the Cvent Administrator. This step is extremely important as it forms the initial stepping stone for the App. The Cvent Administrator has to refer to the documentation on the Developer hub for the setup guide. The Setup on the Cvent App has the following steps:

1. Enabling the App: The admin has to enable the Cvent Salesforce App for the planner's account

2. User Permissions: Cvent Admin has to define which users can create and update the app configuration in Cvent
3. Create Configuration: The admin has to create a configuration which will allow the planner to connect their Cvent Account to their Cvent Salesforce App.
4. Generate an Access Token: Upon creation of the configuration, the admin has to generate an access token which will help establish the Connection between Cvent and Salesforce. The Cvent Admin needs to share this Access token with the Salesforce admin for this to happen.
5. Event Setup: Here, the Cvent admin defines what all actions can be taken on the Salesforce app for a particular configuration. These include, allowing an event with this configuration to be synced to salesforce, Nomination settings, Invitation Settings, Customize email sender preferences and Registration settings.

#### Configuration And Setup in Salesforce

After the setup in Cvent, The App needs to be set up and configured in Salesforce by the Salesforce Administrator. Following are the steps that need to be done by the Salesforce Administrator:

1. Enable Integrations: Enabling event integrations is required to allow and manage event and event participation data on salesforce.
2. Authorize Metadata API: For some features to be activated on the app, Metadata Access is required.
3. Connect with Cvent: This helps establish the connection between Salesforce and Cvent Accounts. The Access token generated by the Cvent Admin is used by the Salesforce Admin in this step.
4. Retrieve Custom Fields: There are data fields in events and registrations that are customized by your organization to track and manage events. By allowing custom fields to be retrieved, the data from these Cvent custom fields is retrieved from Cvent into Salesforce during syncs.
5. Select Cvent Custom fields: Here, the Cvent custom fields which need to be retrieved by the Salesforce admin as per event requirements are selected.
6. Sync Event Data: This step enables manual sync for data between Cvent and Salesforce.
7. Set Event Visibility: Setting up event visibility helps to configure an event filter which defines which sales users can see which events.

8. Set up Attendees: The steps under this section help in defining how attendee data will be mapped and synced between the two platforms.
  - Set up Field Matching: In this step, the admin chooses which fields to use for matching Salesforce records with Cvent contacts. Eg: First Name, Email, Company etc.
  - Set Matching Rules: Once matching criteria is set, matching rules have to be defined, that means, defining the condition requirements as to what action will be taken in salesforce for different types of matching (no match, a single match, or multiple matches)
  - Set up field mapping: Here, mapping is defined to update salesforce contacts, leads and person accounts. This means defining that if any field for contact Salesforce or Cvent is updated, how will that update be reflected.
  - Sync Attendee data: This will sync the attendees from your Cvent events that are associated with the connected access token
9. Automate Data Refresh: Once the events and attendees have been set up successfully, you can now create scheduled jobs to manage data in the app automatically. The data refresh schedules allow adding and updating data. The purge schedules allow deleting the data

### Use The Cvent Salesforce App

Once setup and configuration are complete the App can be used to view event data in salesforce and carry out all the necessary actions by the different teams and stakeholders.

### **The Interaction Areas**

#### Documentation

The step-by-step detailed information of the entire Installation, setup, configuration and updating process is explained in the developer hub Documentation. This documentation is referred to by the Cvent and Salesforce Administrator while they setup and configure the App on both the platforms. It works as a user guide for the App setup. But this documentation is:

- Text heavy
- Unsorted
- Complicated
- Difficult to understand and comprehend.

## App Setup Steps

The Steps and action that need to be taken by the Cvent and Salesforce Admin were not on one screen in both these apps. The admins using both the platforms are required to switch from one screen to the other, while referring to the documentation. This means that the admins, look at a particular step in the documentation, go back to the app, click, scroll, switch tabs and screens, find the particular section and fill in the data and, refer to the documentation again, get back on the app, do the step and then back to the documentation.

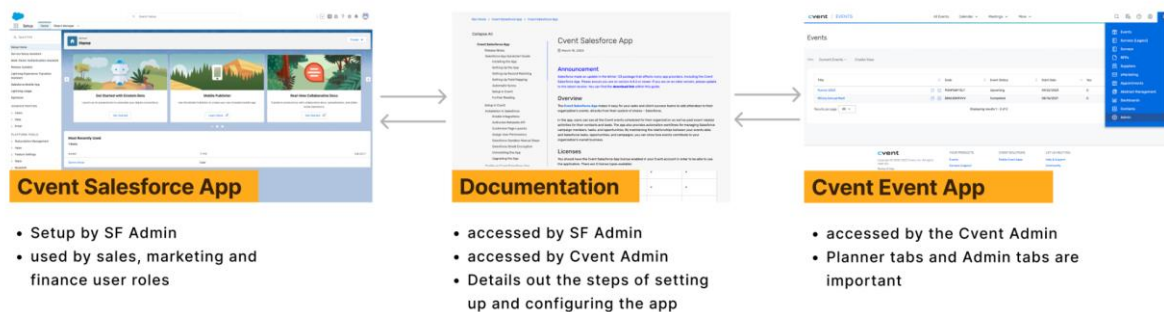


Fig. 2.6 Interaction with the Documentation

## **The Problem with the Setup Process in Salesforce - Need for a Wizard**

1. In case of the Cvent Salesforce App, the steps and task were not sequenced in a particular order which made it difficult for the Salesforce Administrator to complete the Setup process.
2. The complicated and unsorted documentation didn't make the job easier as well. It was not easy to understand which increased the cognitive load on the Salesforce Admin.
3. As the Salesforce admin could not complete the setup and faced problems and difficulties which interrupted the task flow, they reached out to the Support Teams.
4. As a result, the support teams got a lot of questions and queries which increased their workload tremendously.

## User Story

*“As a SF Admin/SF user with Cvent Event Admin permission, I want to more easily configure the Cvent Salesforce App on my own and without assistance from Cvent.”*



## What is a Wizard?

A wizard consists of a series of steps a user is required to complete in order to accomplish a goal [26]. It is an interface design pattern that breaks down a difficult process into smaller doable steps that makes it easier to achieve a particular goal. The user can enter data one at a time in each view and proceed to the next step until completion [27].



Fig. 2.7 Windows 95 Setup Wizard (“Back in time: Windows 95 installation! – Dautti” 2016)

Setup wizards have historically been used with traditional desktop software applications or new hardware installation. The pattern was popularized by Windows 95 (Fig 2.7.) [26]

A wizard is beneficial in the following ways:

1. Simplifies task, Splits complex task into smaller sequential steps
2. Reduces a little burden of the user
3. Makes the process less overwhelming for the user by showing relevant and less information
4. Reduce chances of mistakes

## Cvent Salesforce App Setup Wizard- Introduction and Goals

A setup wizard was introduced in the App, owing to the problems faced by the Salesforce Admins and therefore, Support teams, due to lack of clarity, confusion and cognitive load as a result of the difficult setup process.

The goal of the Cvent Salesforce App Setup wizard was to:

- Simplify the setup process for the user
- Give information about the steps: what they are? What do they mean? And why are they important?
- Enable users to look at their progress
- Allow users to drop out of the process and continue it later
- Give an indication of the approximate time it would take
- Reduce the dependency on the Documentation
- Reduce the load on the Support teams

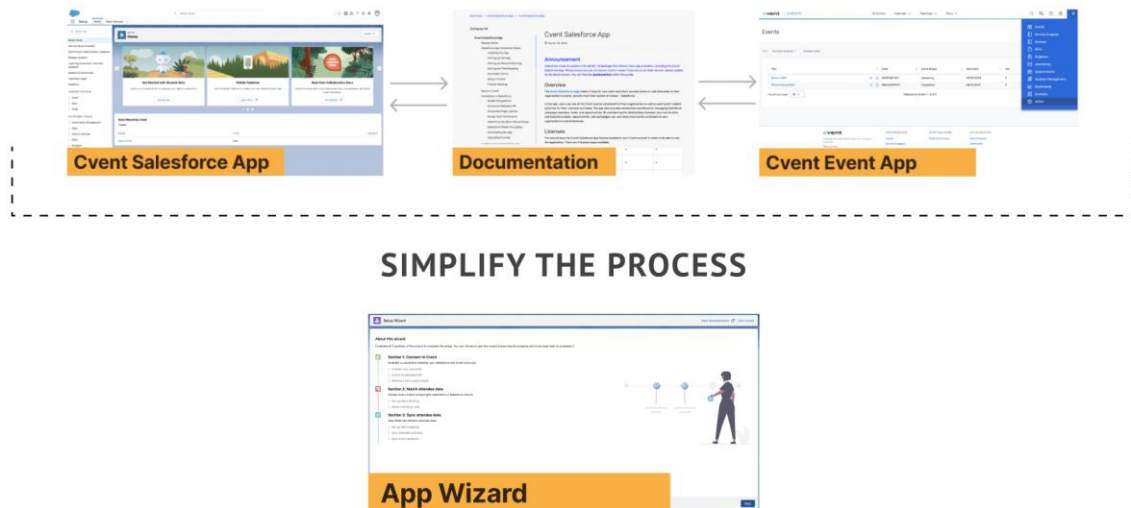


Fig. 2.8 How the App Setup Wizard makes a difference to the old setup Process

During the course of this project, the Wizard was in its development phase and was not yet launched on the App. As a result of which there were no user insights available. Since there was no data on how the wizard was working and how much of a difference was it making, Primary research was conducted to evaluate the wizard. Before primary research, the user journeys were studied and documented using screen mapping methods.

### 2.1.3 Understanding Product Functionality- Cvent Salesforce App Setup Wizard

After understanding the need and goals of the Setup Wizard and why it was introduced, it was important to Deep dive into the functionality of the Wizard. The intent was to analyze and

understand the difference that the proposed wizard was actually making. The wizard divided the set-up process into 3 sections and each section had 3-4 steps. (Fig 2.9)

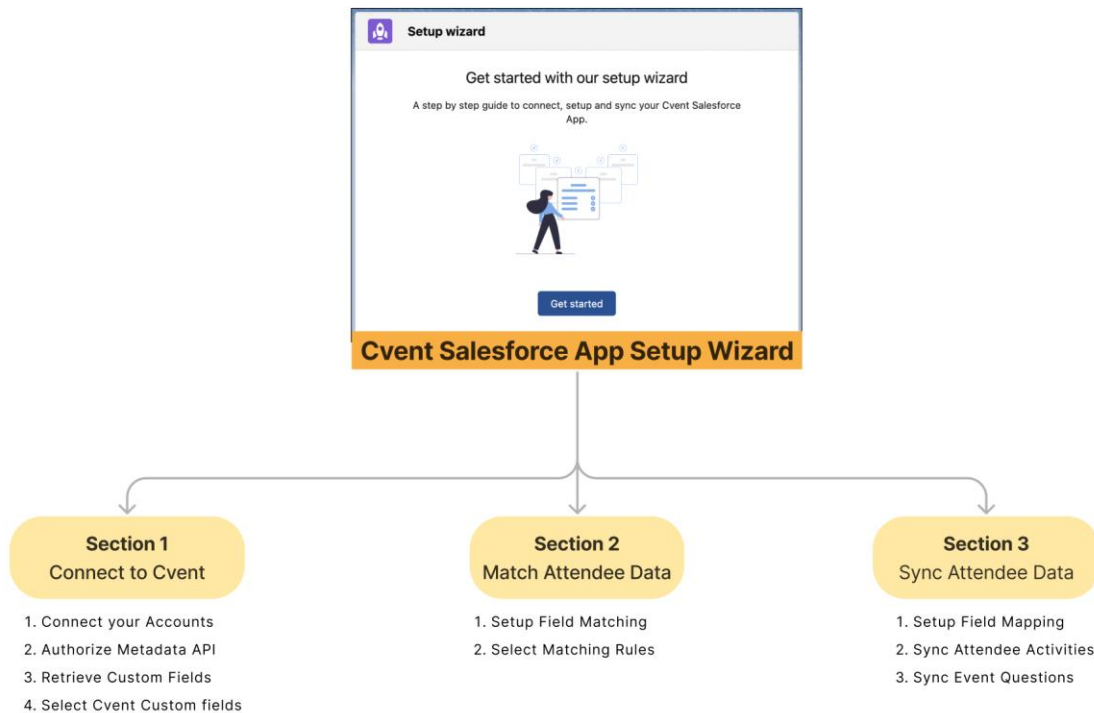


Fig. 2.9 Sections and Steps in the Wizard

The User Journeys using the old process and the new wizard were studied to help understand the impact of the wizard. The two user journeys were:

1. Setting up the Cvent Salesforce App using the Documentation
2. Setting up and Configuring the App using the Wizard on Salesforce

### **Understanding User journeys through Screen Mapping**

The discovery phase continued with an attempt to deep dive into the details of the steps, their working and the flow. The idea was to step into the shoes of the User, that is the Salesforce Admin or someone with Admin like Permissions.

#### **Step 1: Setting up the Cvent Salesforce App using the Documentation**

The exact process of setting up the Cvent Salesforce App on the Salesforce and Cvent side while referring to the documentation was followed (Fig 2.10).



Fig. 2.10 Screen mapping of setup of Setup process on Cvent and Salesforce side using documentation

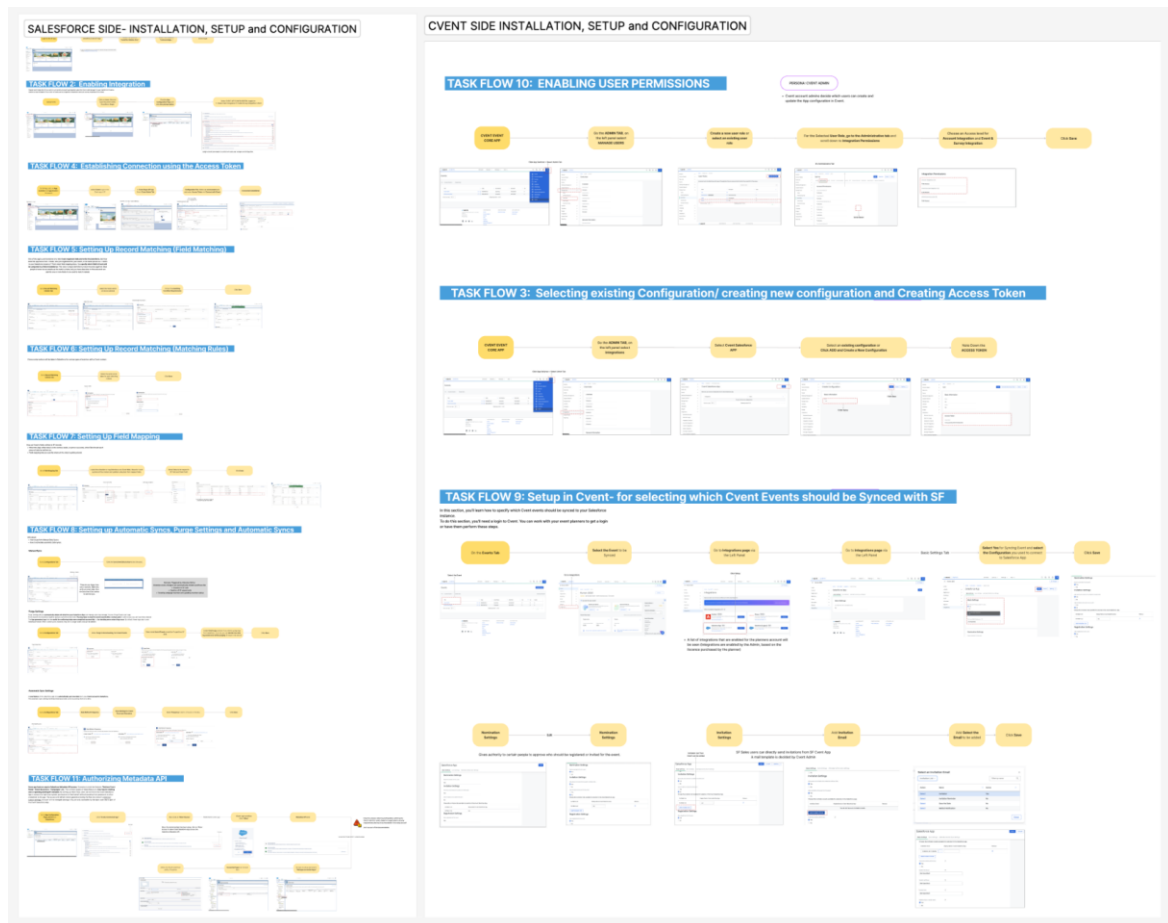


Fig. 2.11 Screen mapping (Zoomed In)

## Step 2: Setting up and Configuring the App using the Wizard on Salesforce

After this, the app setup and configuration were done on the Salesforce side using the Wizard, stepping into the shoes of the Salesforce Admin (Fig. 2.11).

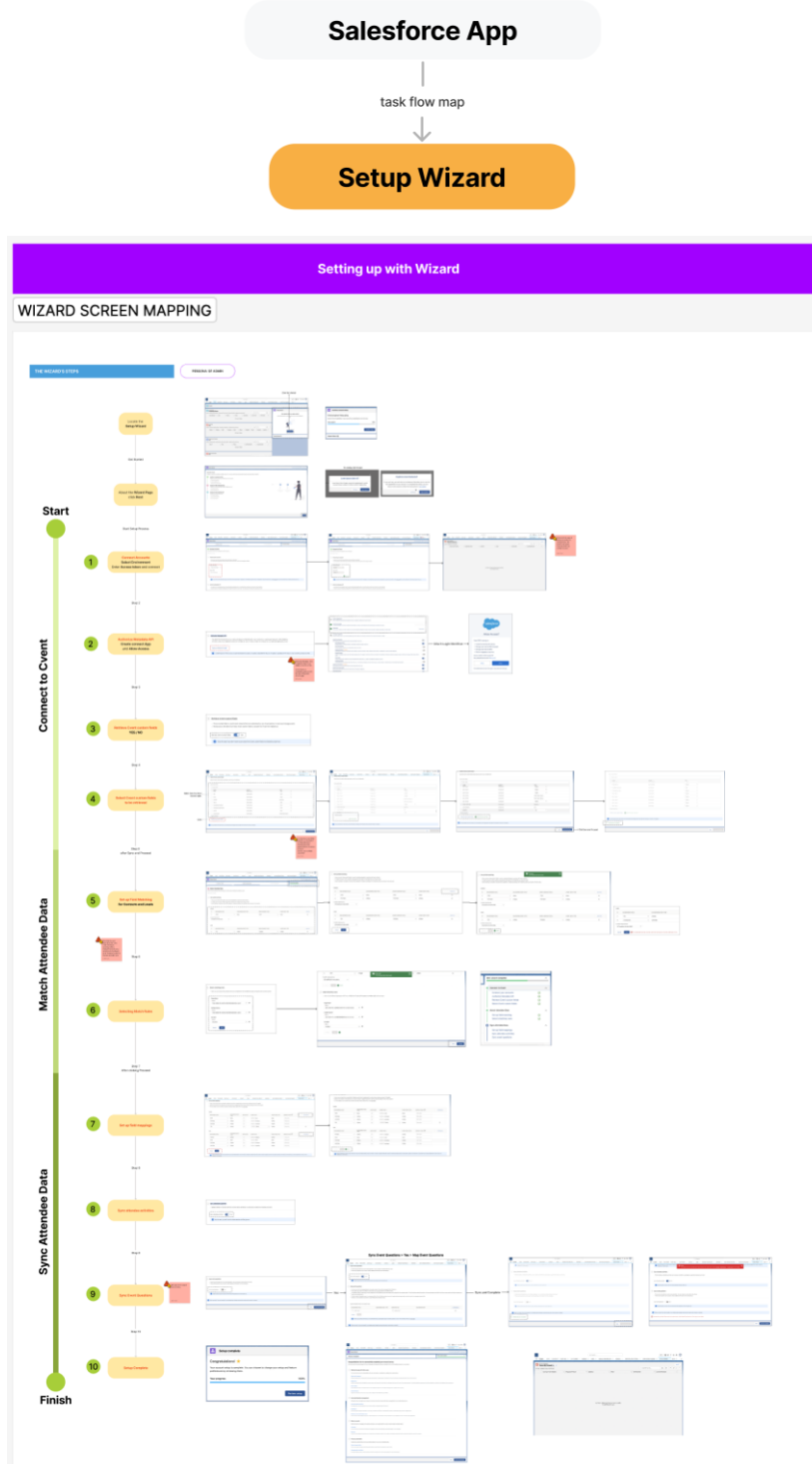


Fig. 2.12 Setup in Salesforce Using the Wizard

### Step 3: Analysis and Documentation

Setting up the apps using both the old process and new wizard, gave a lot of insights and understanding of the process, and generated immense empathy for the user (Salesforce Admin). With the analysis of the Screen mapping, it was noted that the setup process is divided into 3 major sections

1. Pre-requisites in Salesforce
2. Pre-requisites in Cvent (Set up in Cvent)
3. Setup in Salesforce

Fig 2.13. shows the Prerequisites in Salesforce and Pre-requisites in Cvent (Set up in Cvent).

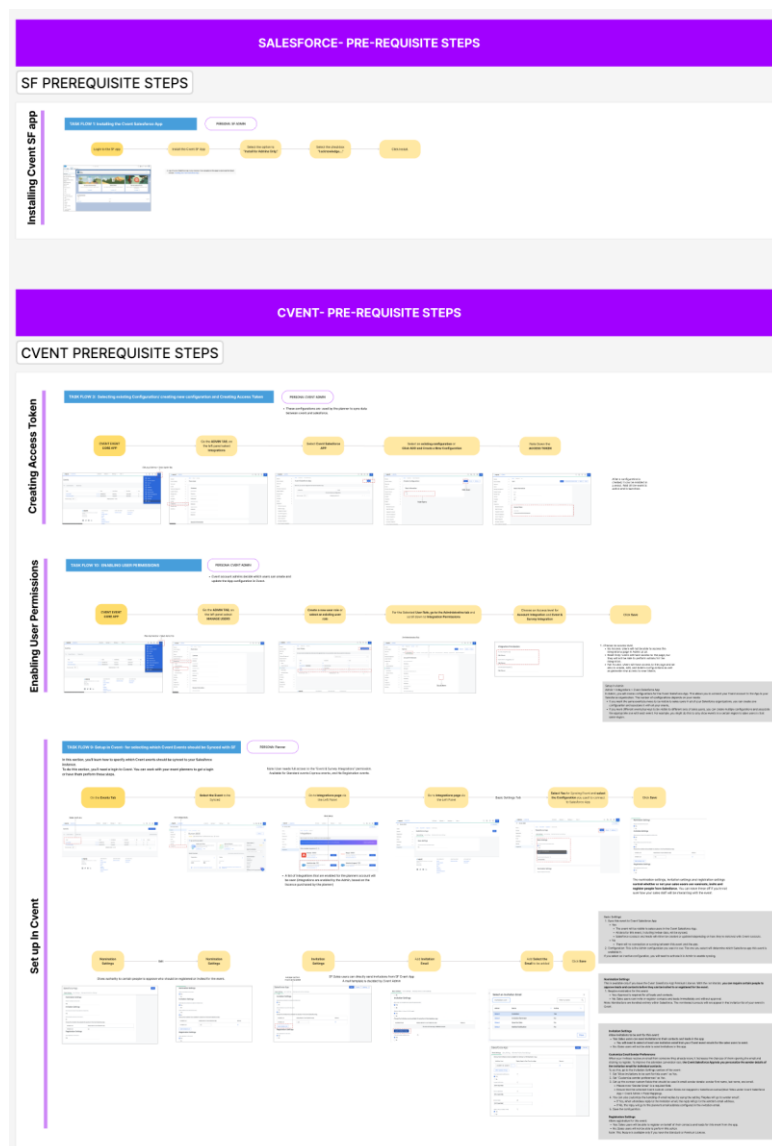


Fig. 2.13 Dividing into Pre-requisites on Cvent and Salesforce Side

The comparison of the setup with and without wizard can be seen in Fig 2.14.

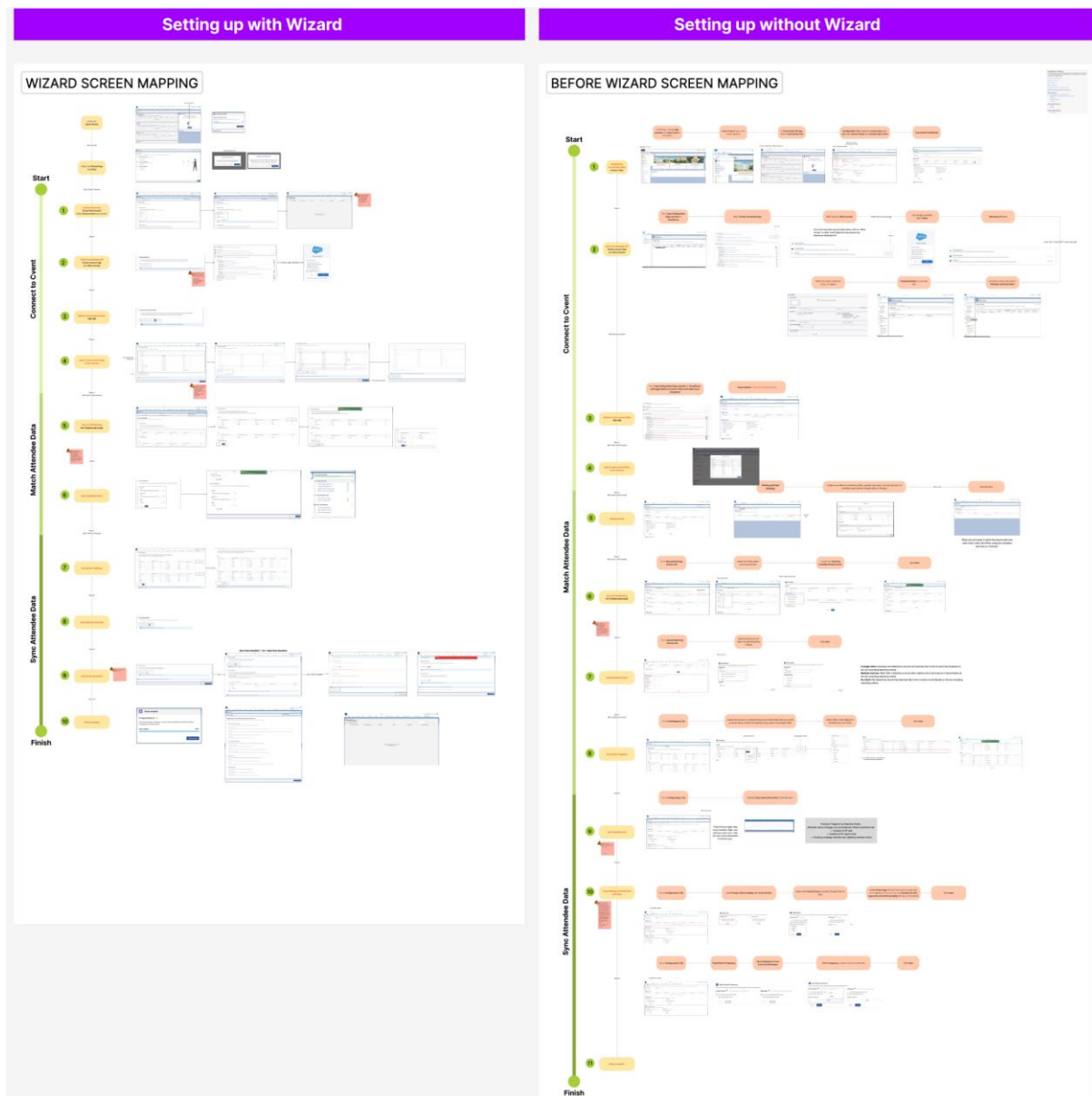


Fig. 2.14 Comparison of the Step with and without the Setup Wizard

### Findings

The Wizard significantly reduced the amount of time and effort required to set up the app using the old process. The user journey using the wizard was simpler and less cumbersome. While undergoing the screen mapping method, a couple of points were noted, which were then validated with the SME. For example, the wizard was missing a few steps which were there in the old process. This was because the wizard incorporated only the most important steps required to set up the app. These findings are mentioned below (Fig 2.15.)

**INSIGHTS: SCREEN MAPPING**

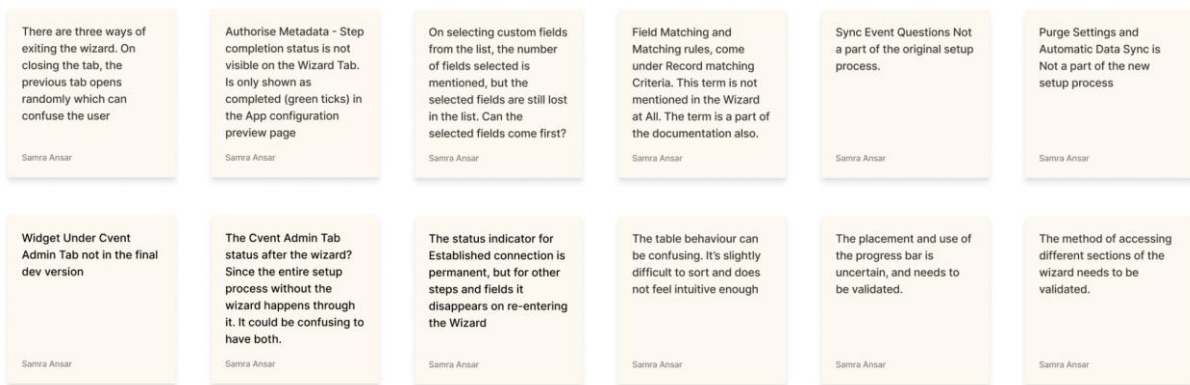


Fig. 2.15 Insights from the Screen mapping

These insights were discussed and validated with the SME’s to be divided into Tech limitations, UX limitations, and Decisions made by the PM (Fig 2.16.). The insights were worked upon later in the design process.

**INSIGHTS: SCREEN MAPPING**

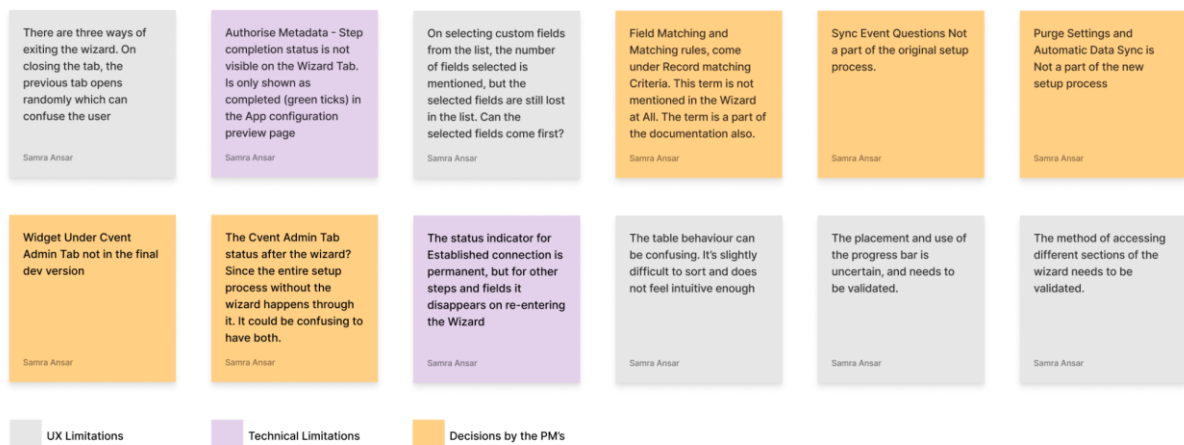


Fig. 2.16 Insights from the Screen mapping- Segregated

**2.1.4 Primary Research**

The Cvent Salesforce App setup wizard has not been launched yet, and was in the development phase. As a result, there was no data available on the user’s experience and feedback of the wizard. Therefore, the method of heuristic evaluation was adopted to identify the usability issues and opportunity areas for improvement and enhancements.



## Heuristic Evaluation

Heuristic Evaluation is a method where experts evaluate a digital product on the basis of certain set heuristics or rules of thumb to measure the usability of interfaces [28]. Heuristic Evaluation is sometimes referred to as “Expert Evaluation” as well [29]. Therefore, the Skills, experience and knowledge of the evaluators has a major role to play in this method. Since it is highly likely that one expert won't be able to identify every usability issue, it is typically carried out by a team of experts. On the other hand, a group of experts has a tendency to examine an interface from different perspectives and therefore are more likely to recognize a wider range of potential improvement areas.

This is a great tool that helps in evaluating a product to minimize usability problems at a much lesser consumption of resources [30]. Heuristic Evaluation helps in identifying usability issues which are directly related to the efficiency of a product. Learnability, discoverability, memorability, adaptability, user happiness, and error handling are all examples of "usability" quality components. The UX of a product is significantly enhanced when these components are provided at a high quality [30]. The effectiveness of the heuristics has been evaluated for general user interfaces by Nielsen & Molich, who reported that 60% of observed user problems could be identified by expert inspection using heuristics [31]. Another test conducted by Jeff Sauro from ‘Measuring U’ concluded that heuristic evaluation can uncover 30-50% of all usability issues including the most severe ones [32].

### Methodology

For evaluating the Cvent Salesforce App setup wizard, Jakob Nielsen’s “10 Usability Heuristics for User Interface Design” were used (Nielsen, 2020). These heuristics are mentioned in Table 2.1.

Heuristic No:	Nielsen’s Heuristic	Meaning
H1	<b>Visibility of system status</b>	always keep users informed, appropriate feedback within a reasonable amount of time.
H2	<b>Match between system and the real world</b>	speak the users' language. Use words, phrases, and concepts familiar to the user, making information appear in a natural and logical order.

H3	<b>User control and freedom</b>	Users often perform actions by mistake. They need a clearly marked "emergency exit" to leave the unwanted action.
H4	<b>Consistency &amp; Standards</b>	Follow platform and industry conventions.
H5	<b>Error Prevention</b>	Eliminate error-prone conditions, or check for them and present users with a confirmation option before they commit to the action.
H6	<b>Recognition rather than recall</b>	Information required to use the design (e.g., field labels or menu items) should be visible or easily retrievable when needed.
H7	<b>Flexibility and Efficiency of Use</b>	Design can cater to both inexperienced and experienced users. Allow users to tailor frequent actions.
H8	<b>Aesthetic and minimal design</b>	Interfaces should not contain information which is irrelevant or rarely needed.
H9	<b>Help users recognise, diagnose and recover from errors</b>	Error messages should be expressed in plain language (no error codes), precisely indicate the problem, and constructively suggest a solution.
H10	<b>Help and documentation</b>	provide documentation to help users understand how to complete their tasks.

Table 2.1 10 usability heuristics for user interface design developed by Nielsen

There were two approaches on how the Heuristic Evaluation could be conducted (Fig 2.17). Approach 1, seemed to be rather limiting in terms of the number of tasks, time and exposure to the product. Approach 2, even though it had a smaller number of experts, allowed individual exploration, review and feedback. Hence, the heuristic evaluation was conducted with the second approach.

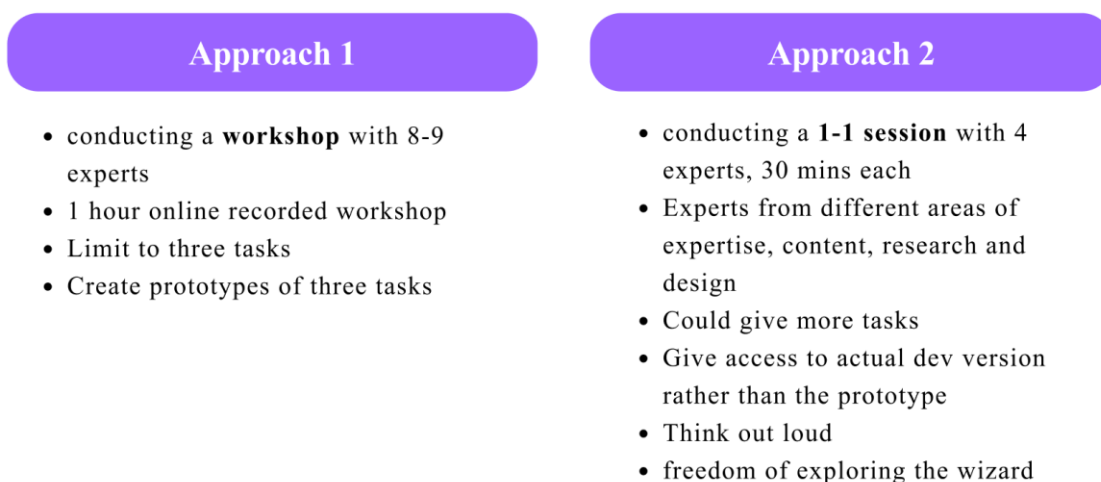


Fig. 2.17 Approaches for Heuristic Evaluation

The Evaluation has the following steps:

1. It started a short brief of the product as the evaluators doing the heuristic evaluation were looking at the product for the first time. The brief included information about the product and the methodology of conducting the evaluation.
2. Once the session started, the experts did the steps and the moderators answered any queries that they had.
3. The moderators silently observed the participants as they explored the product, which gave a lot of information and insights about the product experience and usability.
4. At the end of the session, the moderators thanked the evaluators for their valuable time and effort.

There were three members during the evaluation session: The Expert and two moderators (A product design intern and a research intern). The session was recorded for later referencing and analysis. It had defined 3 scenarios and 5 tasks which the user was required to try and complete as a Salesforce admin, and evaluate the usability and experience of. The experts were requested to “Think Out Loud” and freely explore the platform after doing the defined tasks in Table 2.2 below.

SCENARIO 1: You are an Admin (administrator) familiar with salesforce and you need to setup an account of a client on Cvent org using the setup wizard. This wizard has been introduced to you for the 1st time.		
Task no:	Description	Focus Area
Task 1	You need to check the wizard once before you start using it so you enter the wizard and then exit out of it.	Navigation
Task 2	Now you have to set up an account. For the Evaluation we will directly get to step 3, which is retrieving the Cvent custom fields and selecting which custom fields do you want to retrieve as a SF Admin.	Efficiency and errors
Task 3	You have completed a few steps of the setup process and want to check the status of your progress. How will you check it?	Progress and Navigation
SCENARIO 2: You are nearing the end of the setup process		
Task 4	You need to set up field mapping for your Cvent salesforce account, which essentially enables the system to sync the selected fields across Cvent and salesforce.	Efficiency and errors

SCENARIO 2: Now let's say you have completed the setup process but you need to change some fields in a particular section.		
Task 5	Task 5: You are now on section 1 of the setup process and need to navigate yourself to section 3.	Navigation

Table 2.2 Scenarios and Task defined for Heuristic Evaluation

The heuristics were to be rated as per the severity level of violation. The severity of a usability problem is a combination of three factors:

- The frequency with which the problem occurs: Is it common or rare?
- The impact of the problem if it occurs: Will it be easy or difficult for the users to overcome?
- The persistence of the problem: Is it a one-time problem that users can overcome once they know about it or will users repeatedly be bothered by the problem?

The rankings of severity and their meanings are explained in table 2.3.

The following 0 to 4 rating scale can be used to rate the severity of usability problems:	
Rating	Definition
0	I don't agree this is a usability problem at all
1	Cosmetic problem only: need not be fixed unless extra time is available on project
2	Minor usability problem: fixing this should be given low priority
3	Major usability problem: important to fix, so should be given high priority
4	Usability catastrophe: imperative to fix this before product can be released

Table 2.3 Severity of Usability Problems

### Findings

Heuristic Evaluation led to insightful data and findings which were missed in the self-explanatory Screen Mapping method. It brought a lot of usability and experiential issues to light, which would deteriorate the workability of the Wizard. Fig 2.17 shows the summary of findings. The analysis and sorting of these findings to identify potential opportunity areas for improvement are in the next phase, Define.

## Summary of Findings

Participants expressed their opinions about the usability of Setup wizard on the basis of the interaction with the prototype.

### 1. The toggle for Retrieve Cvent custom fields is confusing to use. **USABILITY CATASTROPHE**

All the participants felt that the toggle provided was on since the beginning. They were hesitant to change it. All of them had to turn it on and off again to check how it functions because of "no" written on the opposite direction which made the participants feel confused.

> [View Image - Toggle](#)

### 2. Changes in progress bar even before Information syncing is complete **USABILITY CATASTROPHE**

Once the user syncs a section its greyed out and progress bar is static and non clickable, but incase the user skips to another section even before sync they could still see the progress bar which is clickable. The participants felt it was misleading as they do not know if the information is synced.

### 3. Participants cannot locate "Quit wizard" CTA **MAJOR USABILITY PROBLEM**

3 out of 4 participants chose home to exit the wizard instead of quit wizard. They expressed that home was their primary option to exit the wizard as they could not find any other way to exit. The participant that located quit option suggested to highlight it.

### 4. The CTA "Retrieve cvent custom fields" was skipped before the next step. **MAJOR USABILITY PROBLEM**

To retrieve the fields a secondary CTA is provided on the bottom left of the fields but the participants skips it as he/she is able to see another CTA on the bottom right to sync and proceed. All the participants felt that the secondary CTA was positioned wrong and could be easily neglected. It was suggested by participants to change the position of it.

> [View Image - Progress bar](#)

### 5. Progress bar not intuitive enough for the users. **MAJOR USABILITY PROBLEM**

All Participants navigated using the sections tab as the incomplete sections were greyed out on top tabs. Only half of them identified the progress bar existing after browsing through the page but none of them opened it to use it for navigation. They felt that the bar did not feel like it would have information for navigation within it.

> [View Image - Custom fields CTA](#)

### 6. CTA can be repositioned. **MAJOR USABILITY PROBLEM**

The CTA of field matching seems to be only for section 2 is what all participants felt. Once there are more fields and participants need to scroll the CTA is lost in the bottom and they don't know if the changes are saved for the section 1.

Fig. 2.17 Summary of Findings from Heuristic Evaluation

## 2.2 DEFINE

The aim of this phase is to synthesize the observations and findings from the discovery phase and convert them into an actionable problem statement based on which solutions can be ideated in the Ideate phase. Define Phase is a converging phase as per the double diamond method, where all the data and information are analyzed to converge and define the pain points and probable opportunities.

In this project, the next few sections of the define phase will focus on:

- Defining the user proto persona
- Analyzing the findings of the heuristic evaluation
- Creating affinity mapping for the findings
- Identifying pain and pleasure points
- Analyzing the impact of the pain points and identifying the most important ones
- Defining Use cases and scope
- Creating a problem Statement
- HMW

### 2.2.1 Proto Persona

One of the fundamentals of user experience or customer experience is to “Know the User”. The Cvent Salesforce App was native on the Salesforce platform. Due to which, there was no persona created for the wizard. In order to develop a better understanding of and empathy for the user for whom the wizard was being created and enhanced, it was necessary to create a proto persona based on information available on various internet and internal sources. Connecting and interacting with the user was not on the table as only customer facing teams can do that. Therefore, creating a proto persona was important to have vision of the user.

A persona summarizes the characteristics of specific user groups of a system or product. They are simple visual tales that are based on research and contain insights that reveal real priorities, user’s wants and preferences that have a direct impact on outcomes. It is based on real users who have been interviewed and observed in their natural settings. A Proto-persona on the other hand, is essentially a hypothesis about the users as personas and profiles need facts to be

grounded in order to function [34]. A Proto-persona is mostly utilized for agile development and is useful for brainstorming. All team members who might not be familiar with actual users can see a shadow of them thanks to proto-personas [35].

Fig 2.18 shows the proto persona of the User (Salesforce Admin) who sets up and configures the Cvent salesforce App on the Salesforce platform.



Max

Salesforce Administrator/  
User with Admin like Permissions

Goals & Needs

- Installing, setting up and configuring the Cvent Salesforce App easily
- Completing the steps of setting up the App without needing support and assistance
- Making changes to the field inputs in any step and having the changes tracked, after successfully setting up the app once.
- Having knowledge of Updates/changes in set up fields if more than one admin is working on it
- Having knowledge on mandatory and non-mandatory steps

Responsibilities

- supporting users, managing data, maintaining security standards, and delivering actionable analytics.
- Maintain the platform
- Make it as easy as possible for users of any technical level to use Salesforce
- Stay current on the platform's new tools, capabilities, and updates

Challenges

- Confusion regarding the set up process and not finding answers in time
- Wastage of time and effort, in understanding and completing the steps
- Dependency on support teams leads to delay and loss of time
- Going through the unsorted documentation adds up to the frustration
- Doing all this while coordinating with the stakeholders for requirements necessary for the setup

Influences

- Interacting and coordinating with stakeholders and various other teams and factoring in their requirements
- Can be of any educational background but is trained and qualified as a Salesforce Admin
- Needs to keep up with the new releases, updates, and changes in the platform, and educate the team about it too
- Has dependencies on Cvent admin for permissions

Details

<b>Age</b>	40
<b>Location</b>	United States
<b>Company Size</b>	Variable (TBD)

Collaborates with

- Cvent Admin
- Planner
- Planner's Sales team
- Planner's Marketing team
- Planner's Finance team

BIO

As a Salesforce Admin, I have deep knowledge of all things Salesforce and I enable the Business I am working with to get the most out of Salesforce technology. I have undertaken a training course and cleared a [Salesforce Certified Administrator exam](#). I understand how to make the platform work to the meet my companies goals. **Some organisations may employ just one admin; some employ many people in this role.** I work to solve business problems by setting up the Salesforce platform to meet business needs. This includes building, configuring, and automating technology solutions to deliver business value. I assign user roles and permissions of the platform to the other teams like sales, marketing and finance, while also educating the other departments, including sales, marketing, customer service, and more, on how to use our platform most effectively.

Being up to date on updates and changes in the salesforce platform are important for me, in order to make the most out the salesforce platform.

Fig. 2.18 Proto Persona of Salesforce Administrator

This user can either be a Salesforce Administrator, or someone who has Admin like Permissions.

### 1. A Salesforce System Administrator

- Is responsible for building, developing, and maintaining an organization's Salesforce org

- They are typically within the IT role within a company, though sometimes can be sales and/or marketing operations people.
- They have all of the permissions to do anything/everything as it relates to managing the salesforce account

## 2. Salesforce User with the Cvent - Event Admin permission set:

- They have been delegated the configuration and management of the Cvent Salesforce App by Salesforce Admin
- They are only related to the Cvent Salesforce App and have been assigned the Cvent - Event Admin permission only.
- They do not contain Salesforce account permissions to make the types of changes the app needs to view/consume all Cvent data

### 2.2.2. Analysis of Research Findings

During the Discover phase, heuristic evaluation was conducted as a method of primary research. In this phase, the findings from the heuristic evaluation were analyzed to identify opportunity areas.

### Findings

The experience and feedback of all four evaluators was documented as shown in Fig 2.19.

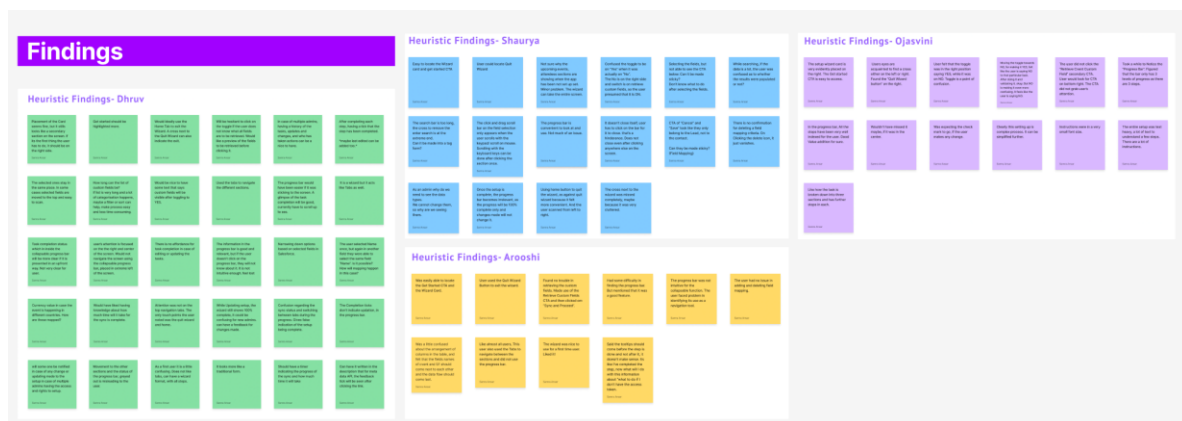


Fig. 2.19 Documentation of Findings from Heuristic Evaluation



They consisted of experiences, problems, reviews, observations, questions and feedback about different areas of the product. To sort findings about each area of focus together, affinity mapping was done Fig 2.20



Fig. 2.20 Affinity Mapping to sort Findings

Some of the High-level findings were:

1. Issues with quitting the wizard using the quit wizard button. All participants used different ways to quit the wizard.

2. Users preferred home to quit over quit option. But for the participants that used home to quit it the progress was saved. It doesn't quit the wizard but changes tabs.
3. Users faced issues with the toggle button's UI. Confused with the rest state of the toggle.
4. The users faced difficulty in scrolling through the table and wished there was a scroll bar available.
5. The CTA of the Cvent custom field in the bottom was neglected and not used by any participant. It's a secondary CTA but it's not visible at all which led to the missing of an important step.
6. The selected fields don't collect at the top and one needs to scroll through them all the way to deselect or check them.
7. Progress bar was neglected by half of the users. The users felt that it was just a progress bar and the dropdown wasn't intuitive.
8. One of the users mentioned that the progress bar could be a learnable feature. Another mentioned that it's a good way now that they know how it functions.
9. The user is confusing the Save and Cancel CTA to be there only for the second set of fields.
10. For the fixed fields in field mapping, first name, last name, company and email, the Cvent fields are fixed but the salesforce fields were editable and the input has a cross, which made the step prone to errors.
11. One user found that the font size overall was too small and the setup was too text heavy. Feedback text was smaller than other fonts.
12. While the setup was syncing the users wished there was a progress indicator stating syncing progress and estimated time for completion.

All the findings were discussed with the Mentors and SME's to segregate the findings into: UX limitations, Technical Limitations and Decisions by the PMs. Apart from the Heuristic Findings, there were some hypotheses made during product explorations. These hypotheses were also discussed with the SME (Fig. 2.21), and opportunity areas were identified.

Description	Screenshot	SME comments
<p>There are three ways of exiting the wizard. On closing the tab, the previous tab opens randomly which can confuse the user</p> <p>Sarina Azeem</p>		<p>OK</p> <p>Sarina Azeem</p>
<p>Authorize Metadata - Step completed status is not visible on the Wizard Tab. It only shows as completed (green ticks) in the App configuration previous page</p> <p>Sarina Azeem</p>		<p>The Salesforce App has two environments. This means that there are Pages that can be customized and tracked by Cvent and Pages which are managed by Salesforce that cannot be customized and cannot be tracked by Cvent.</p> <p>Hence Metadata API page is one such page which cannot be tracked by Cvent. So whether the user has completed metadata API process or not, this status cannot be tracked by Cvent and the indicator of this cannot be shown as the other steps.</p> <p>This is a Technical Limitation that tracking everything is not possible.</p> <p>Sarina Azeem</p> <p>Sarina Azeem</p>
<p>on selecting custom fields from the list, the number of fields selected is mentioned, but the selected fields are still lost to the list. Can the selected fields come first?</p> <p>Sarina Azeem</p>		<p>This can be explored and can be taken as a use case.</p> <p>Can have something like a show selected fields check box</p> <p>Sarina Azeem</p>
<p>The value of the selected field and of the title bar is the name. During scrolling it might get confusing as the two get mixed up</p> <p>Sarina Azeem</p>		<p>This can be explored and can be taken as a use case</p> <p>Sarina Azeem</p>
<p>The sorting of columns is unclear. It's not visible on all columns at the same time. The table behaviour can be made better. Sorting by type doesn't work</p> <p>Sarina Azeem</p>		<p>This is because sorting can only happen for one column and one kind of data at a time. If the sorting is happening in Object, then it cannot happen in name simultaneously.</p> <p>Sarina Azeem</p>
<p>Hovering on the deselect doesn't inform the function.</p> <p>Sarina Azeem</p>		<p>This can be explored and can be taken as a use case</p> <p>Sarina Azeem</p>
<p>after completion of the setup, the setup complete card stays on the homepage. Consider removing? The wizard tab can also be made field to enter wizard again.</p> <p>Sarina Azeem</p>		<p>Irrespective of the TAB, the Card has to remain because the admin might want to review it. The review or updates might happen in case of new versions, change in requirements etc. The content can maybe be changed?</p> <p>Sarina Azeem</p>
<p>when logged out while in the wizard, logging in or re-entering brings back to the set up complete next steps page. The two CTA at the bottom both say back. It made me confused.</p> <p>Sarina Azeem</p>		<p>Will use the collaborative progress bar for navigation</p> <p>LX review- Review setup should ideally bring the user back to the section 1. The user should not be brought to the next steps page. In this case, however, the Back CTA content can be changed to "Back to Wizard".</p> <p>Sarina Azeem</p>
<p>There are no information text on section 2. Have they been missed or this section doesn't require them</p> <p>Sarina Azeem</p>		<p>This section does not require information text, Maybe that is why it has not been provided. Talk to Arun once?</p> <p>Sarina Azeem</p>
<p>Information Text in section 3 mentions the same info as the step description in the beginning.</p> <p>Sarina Azeem</p>		<p>Because this is important for that particular step. Talk to Arun Maybe?</p> <p>Sarina Azeem</p>
<p>Are you sure you want to leave? only comes when the user exits the wizard using quit wizard. And does not come using the cross and home tab button.</p> <p>Sarina Azeem</p>		<p>This should pop up irrespective of how the user is leaving the wizard. Can be added.</p> <p>Sarina Azeem</p>

Fig. 2.21 Hypotheses Discussion with SME

### 2.2.3. Identification of Pain and Pleasure Points

The findings and analysis highlighted a lot of pain points. Pain points incur a cost to users which could be an increased interaction cost and cognitive load [36]. With usability issues such as these the user could lose trust and confidence, and resort to help which could lead to a delay

in time. A non-satisfactory user could also lose trust in the company. Hence it is extremely important to reduce usability issues and pain points that the user might experience. This would not only increase satisfaction, but also make the process more efficient and effective [37].

Workflows and user experience that are complicated are also prone to error. Such workflows can increase interaction cost as the user now has to take additional steps to fix the error. Complicated interfaces also increase the need to call for assistance which also adds to the overall interaction cost. Some pain points also incur a time cost, which essentially means that the user has to wait for a long time for the process to be completed. It might get even more frustrating for the user when they are unaware of the estimated time that it could take. Salesforce Cvent App Wizard had pain points in all these areas.

The pain points identified from the analysis of the heuristic evaluation are enlisted below:

1. Placement of the Wizard makes it seem secondary on the screen
2. The quit wizard link was only used once, rest all the times the user used the home button to exit the wizard
3. Toggle switches are confusing, the user misinterpreted the meaning and state of the action, leading to skipping an important step
4. Users missed the Retrieve Cvent Custom Field CTA, as it is a secondary CTA and didn't grab the user's attention
5. The current system doesn't provide flexibility in scrolling inside the step
6. The search field is too long
7. The selected fields do not populate together/ stick together. Finding the selected fields and making any change to those is a problem.
8. The system doesn't acknowledge changes being made to any step. No success message for already completed steps and any update made, when the user is revisiting the wizard
9. The information texts come after the task, what will the user do with information about the task when they have already done it.
10. Table behavior of the Field mapping- default & mandatory fields have an option of being editable in Salesforce.
11. Table behavior of the Field mapping- the table enlists all fields with varying data types for every selected field. The user has to manually search or read through the entire list

to find the field they are looking for. (Data Types need to be same across Cvent and SF)

12. Confusion regarding the sync status and switching between tabs during the progress. Gives false indication of the setup being complete.
13. Font size in the entire wizard is very small and even smaller for success and information messages. The interface is text heavy
14. The progress bar is placed in a corner and doesn't draw users' attention
15. The user did not realize that the progress bar is clickable as a collapsible unit and can be used to track steps and navigate through them
16. The progress bar doesn't collapse back itself or on clicking anywhere on the screen. It also gets lost when the user scrolls down. Doesn't provide the functionality of navigating through sections, only navigates through steps
17. No information on how long it will take for the sync to happen.
18. The wizard does mention the minutes taken to complete steps but doesn't take into account the syncing time. Which adds up to the overall setting up time only
19. The color of the selected field and of the title bar is the name. during scrolling it might get confusing as the two get mixed up
20. "Are you sure you want to leave" only comes when the user exits the wizard using quit wizard. And does not come using the cross and home tab button.
21. when logged out while in the wizard, logging in or re-entering brings back to the set up complete next steps page. The two CTA at the bottom both say back. It made the user confused.
22. After completion of the setup, the setup complete card stays on the homepage. The wizard tab can also be made fixed to enter wizard again.
23. Not sure why the upcoming events, attendees' sections are showing when the app has not been set up yet. The wizard can take the entire screen.

The heuristic analysis also highlighted some pleasure points which are enlisted below:

1. It was easy to locate the Wizard card and get started CTA
2. In the progress bar, All the steps have been very well indexed for the user. Good Value addition for sure.
3. The progress bar was a good feature
4. Like how the task is broken down into three sections and has further steps in each.

- The wizard was nice to use for a first-time user. Liked it!

### 2.2.4. Categorization of Pain Points

The identified pain points were a long list of usability issues and UX limitations which deprived the user of a smooth and easy experience of setting up the Cvent Salesforce App. These pain points belonged to different categories as per the focus area they are affecting (Fig 2.22)

These categories are:

- Visual Design
- Interaction Level
- Feedback
- Navigation
- Productivity / Time and effort
- Error possibilities
- Information Hierarchy



Fig. 2.22 Categorization of Pain Points

### 2.2.5. Impact Analysis

All pain points affect the user at different levels during a product experience. Some pain points are minor, whereas the others are usability catastrophes. In order to identify which pain points, need to be tackled and resolved on priority, impact analysis of the pain points is important.

The impact analysis of the identified pain points was done using the Impact-Effort Matrix. This is a 2D visual that plots relative user value against implementation complexity [38]. The resulting matrix captures the relative effort necessary to implement candidate features and their impact on the users. It can be subdivided into four quadrants:

1. Quick wins include low-effort, high-impact items that are worth pursuing.
2. Big bets include high-effort, high-value items; they should be carefully planned and prototyped, and, if executed, are likely to be differentiators against competitors.
3. Money pit includes low-impact, high-effort items that are not worth the business investment; there are better places to spend time and resources.
4. Fill-ins comprise low-effort, low-impact items that may be easy to implement but may not be worth the effort as their value is minimal [38].

The impact of the pain points was analyzed as in Fig. 2.23 below.

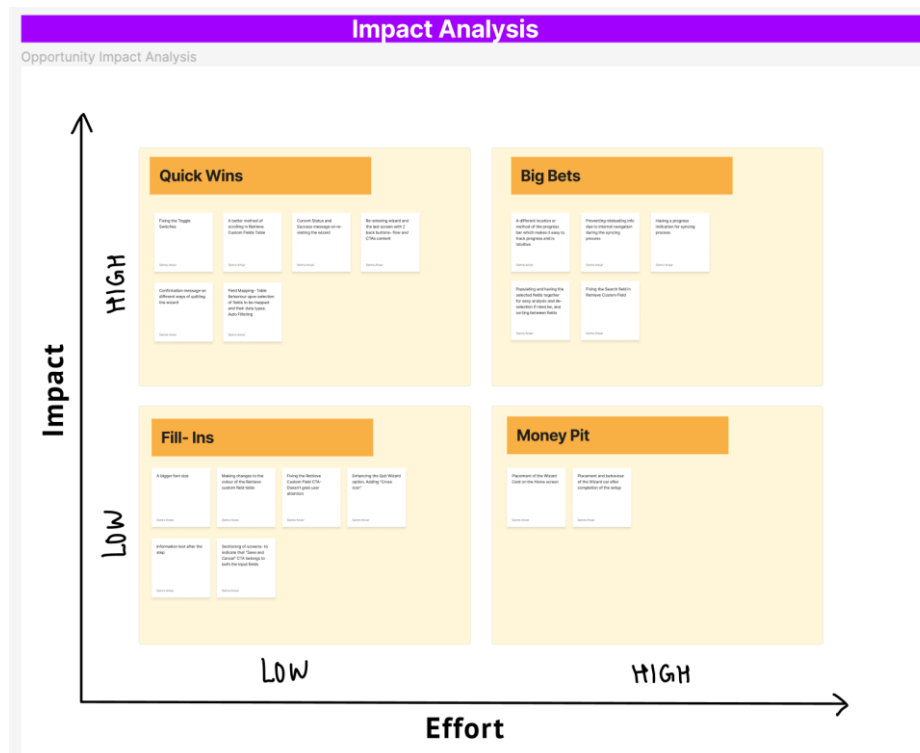


Fig. 2.23 Impact Analysis of Findings

The most significant and impactful pain points, that were now areas of opportunity are:

1. Toggle Switches Behavior
2. Retrieve Custom Field Table Behavior- Search Bar, Sorting, Scrolling, Selection and Deselection. And saving. (Max scope)
3. Field Mapping Table Behavior- Auto field population based on data type, sectioning of the step
4. Progress bar- placement and functioning. (Max scope)
5. Feedback- Current Status and Success message on re-visiting the wizard. Know when editing is in progress.
6. Navigation- Home screen to Wizard to Home screen. Re-entering the wizard screen.

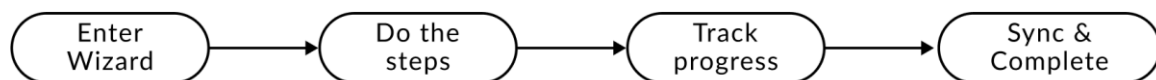
### 2.2.6. Defining Use Cases and MVP

The user who are interacting with and using the Cvent Salesforce App Wizard, can broadly be divided into:

1. First time user who wants to set up the Cvent Salesforce App
2. First time user who wants to update the Cvent Salesforce App
3. A recurrent user who wants to update the Cvent Salesforce App

The task flow of the wizard at a very high level is shown in Fig 2.24.

#### First time User



#### Regular User/ New Admin

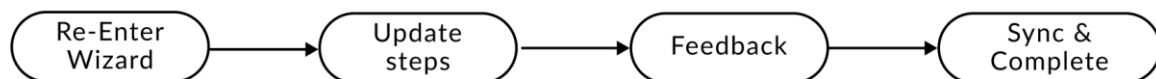


Fig. 2.24 High Level task flow for Admins

Therefore, In each of the three use cases, a minimum viable product should:

1. Make it Easy for the user to Navigate the app



- Enter and exit the wizard
  - Internal Navigation of the Wizard
2. Add value, effectiveness and efficiency while completing the steps
    - Reduce Scope of Error
    - Increase productivity
    - Give quick and accurate system feedback to the user
    - Reduce the Interaction Cost
    - Provide information in the easy-to-understand sequence
  3. Make it easy for the user to track progress
    - The visuals should display accurate information
    - System feedback should be quick
    - Visuals should be clean and noticeable
  4. Have an intuitive and informative syncing process
    - The interface should be displaying progress tracking for syncing process
    - The user should be informed of the current state of the wizard

### **2.2.7. User story & Problem Statement**

User Story:

*“As a SF Admin/SF user with Cvent Event Admin permission, I want to more easily configure the Cvent Salesforce App on my own and without assistance from Cvent.”*

Problem Statement:

*“The new setup wizard simplifies the old setup process. The user’s however, face difficulty in key interaction areas, which reduces the effectiveness and efficiency of the wizard”*

**So, how might we increase Efficiency and Effectiveness, of the wizard?**

## 2.3 IDEATE

The Ideate Phase focuses on brainstorming, and creating solutions to resolve the pain points that were identified in the Define Phase. The step started with brainstorming and concept sketches for each of the opportunity areas. Constant referencing to UX principles was also done to make sure the concepts fall in line with usability standards. Since the Cvent Salesforce App is native to the Salesforce platform, it was important to also reference the Design System of Salesforce, The Salesforce lightning design system (SLDS). This was crucial to have consistency and follow standards across all products. It would also later benefit the developer while converting prototypes into code.

### 2.3.1. Paper prototypes/ sketches

The ideate phase began with a paper and pen, and screenshots of the opportunity areas, i.e., high level pain points. Design Recommendations for designing setup wizards was also studied before jumping into solution design.

Following are some of the recommendations for Designing Usable Wizards:

- Wizards should be used for novice users or infrequent processes (e.g., configuration or setup)
- A clear mental model of the process should be communicated by highlighting the current step, and displaying a list or a diagram of the steps involved. Setting the right expectations by informing the user about the steps (how many) and the process is important
- A clear sequential order of the steps should be enforced so that users are not able to pick a step before completing the steps preceding it.
- For navigating to the next and previous steps, buttons with descriptive labeling should be included.
- The users should be allowed to save state and exit the wizard midway. They should be able resume the process at a later time.
- Users should be able to access all the information that they need to set up in the wizard itself. Depending on the other sources of information should be avoided.
- In a window next to the wizard, Help and explanations should appear. Descriptions of any terms or fields in the wizard should be viewable next to the wizard.

- The user's previous selections can become the wizard's defaults for subsequent uses. From one wizard use to the next, it will be advantageous if the user system remembers their selections and input values [46].

Paper prototypes explored the various methods of tracking progress, feature enhancements for better table behaviors, Toggle behaviors and other options. Different areas of opportunity were looked at, and probable solutions were sketched, looking at placements of buttons, search bars, Drop downs etc. Content design and button labels were also focused on.

The paper prototypes created are shown below Fig. 2.25.

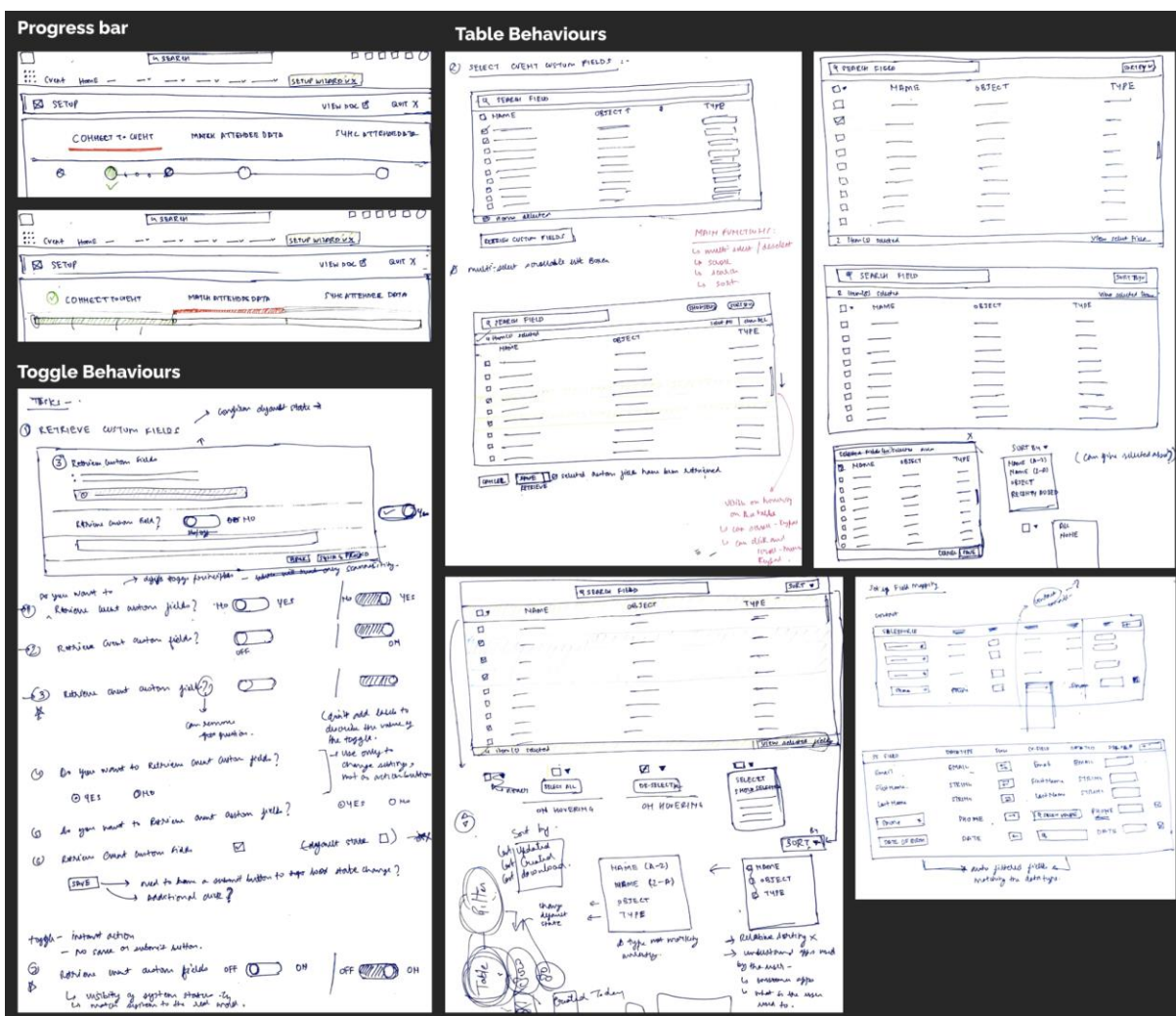


Fig. 2.25 Paper Prototypes

Best Design does not happen in silos. UX design is all about iterations, and iterations require feedback. Early feedback helps in quick rectification. Hence during the entire ideation phase early feedback was taken, and iterations were done.

### 2.3.2. Wireframes

Wireframe turns abstract ideas into something tangible [39]. After feedback was taken on the paper prototypes, further iterations were done. These were converted into Mid fidelity prototypes or wireframes, to get a better understanding of the information placement, features placement and the interface. There were about 2-5 design solution options for each of the opportunity areas.

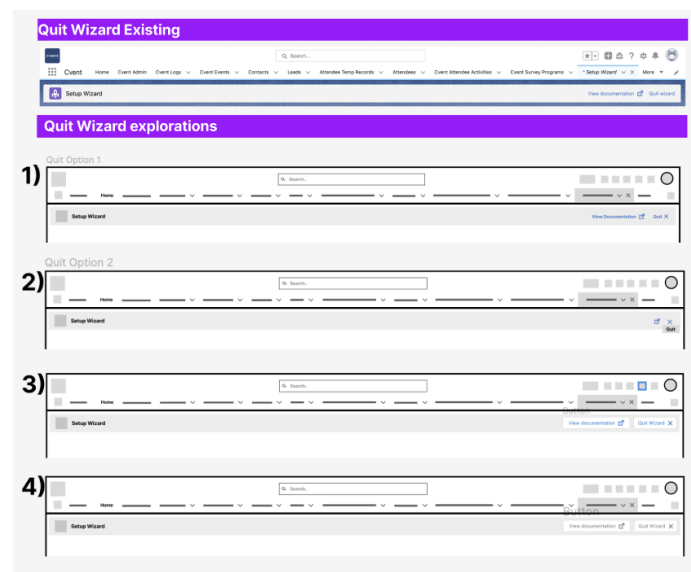


Fig. 2.26 Mid-fidelity explorations for Navigation (Quitting the Wizard)

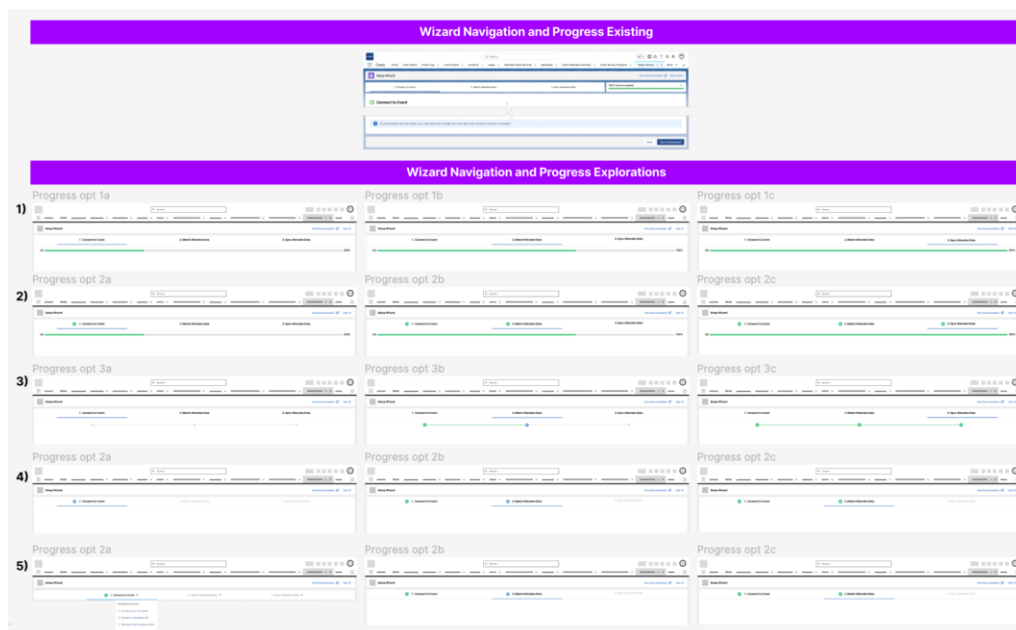


Fig. 2.26 Mid-fidelity explorations for Navigation and progress

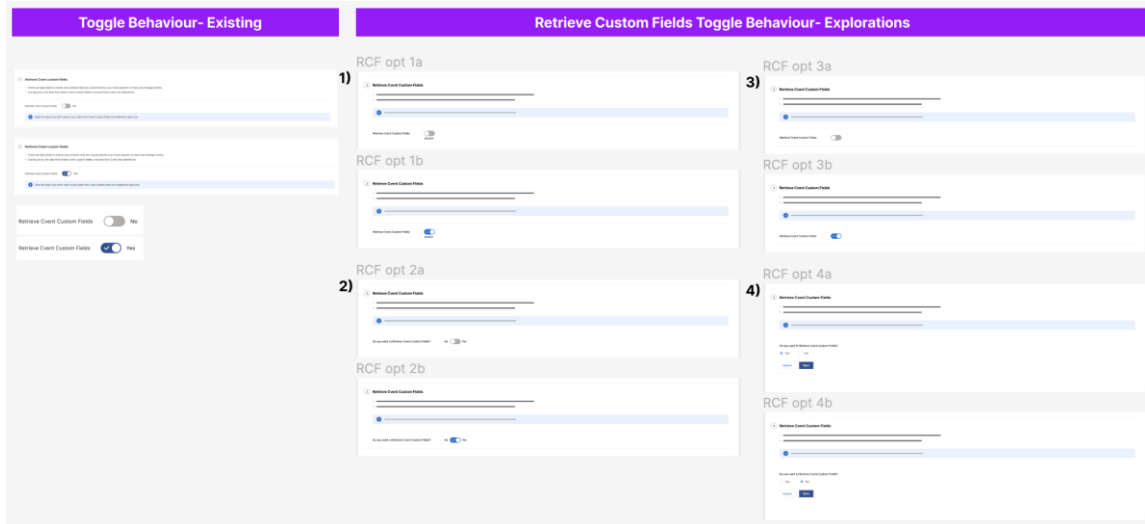


Fig. 2.27 Mid-fidelity explorations for Toggle Behavior

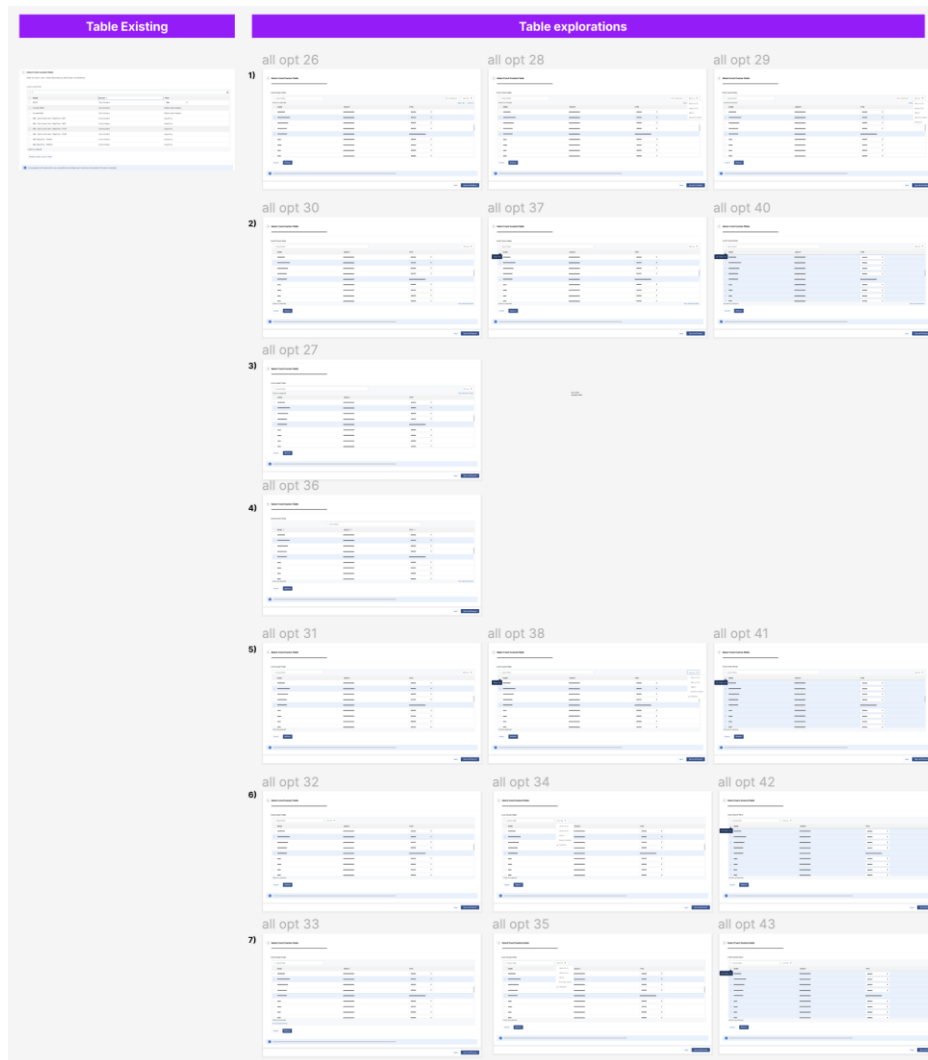


Fig. 2.28 Mid-fidelity explorations for Table Behaviors

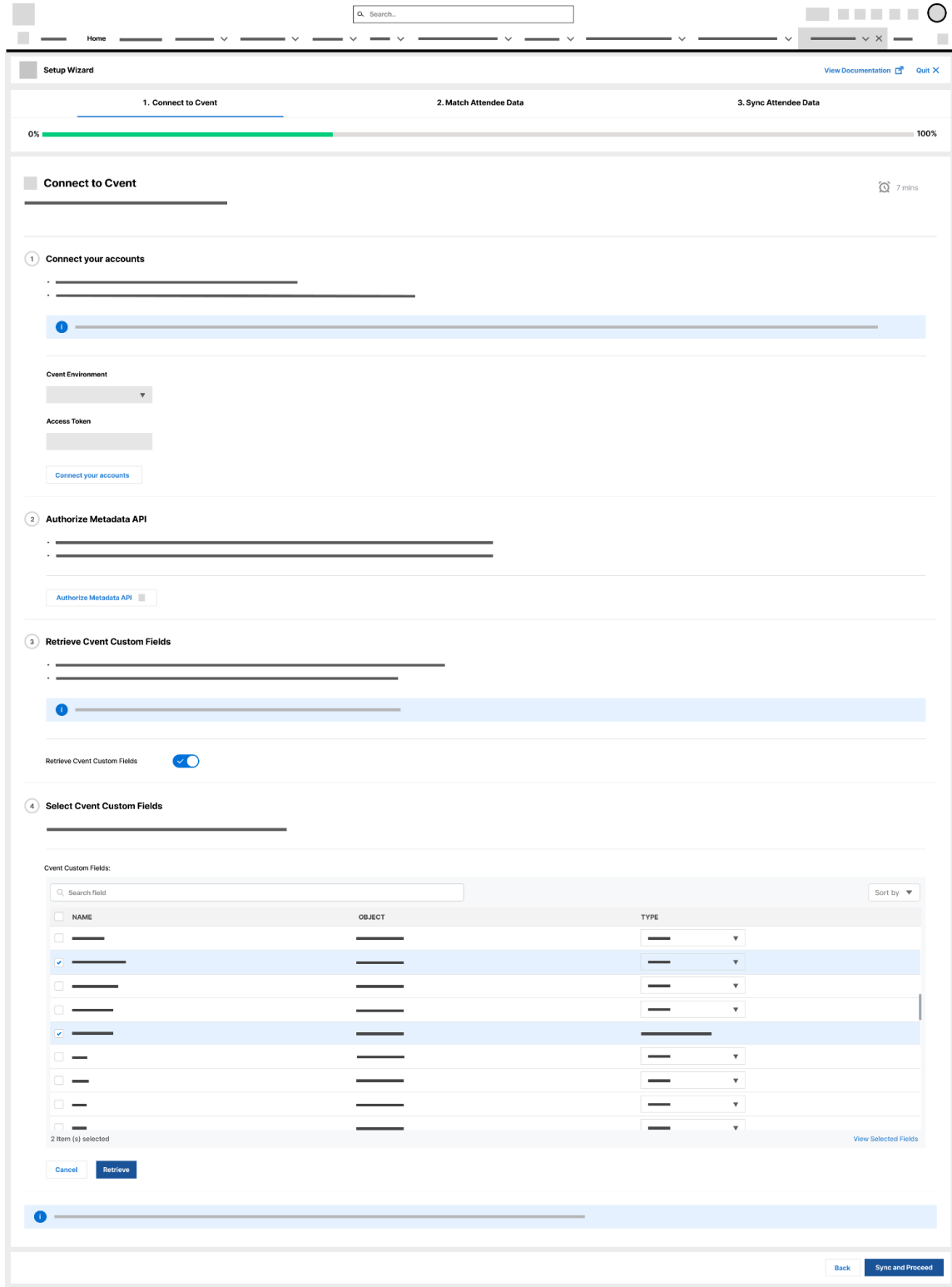


Fig. 2.29 Section 1- Mid fidelity Screen

There were other areas of exploration as well, the images of which have not been included in this report

### 2.3.3. Dot voting/ Hallway Testing

Since there were multiple design options solving each pain point, dot voting/ hallway testing was done to identify the most viable solution. Dot voting is a simple tool used to democratically prioritize items or make decisions in a group setting. It is an easy, straightforward way to narrow down alternatives and converge to a set of concepts or ideas. [40]

#### Methodology

Dot voting was done in both online and offline format. There were 5 participants, each from the UX team. They were all product designers. The sessions were 30 mins long and recorded sessions.

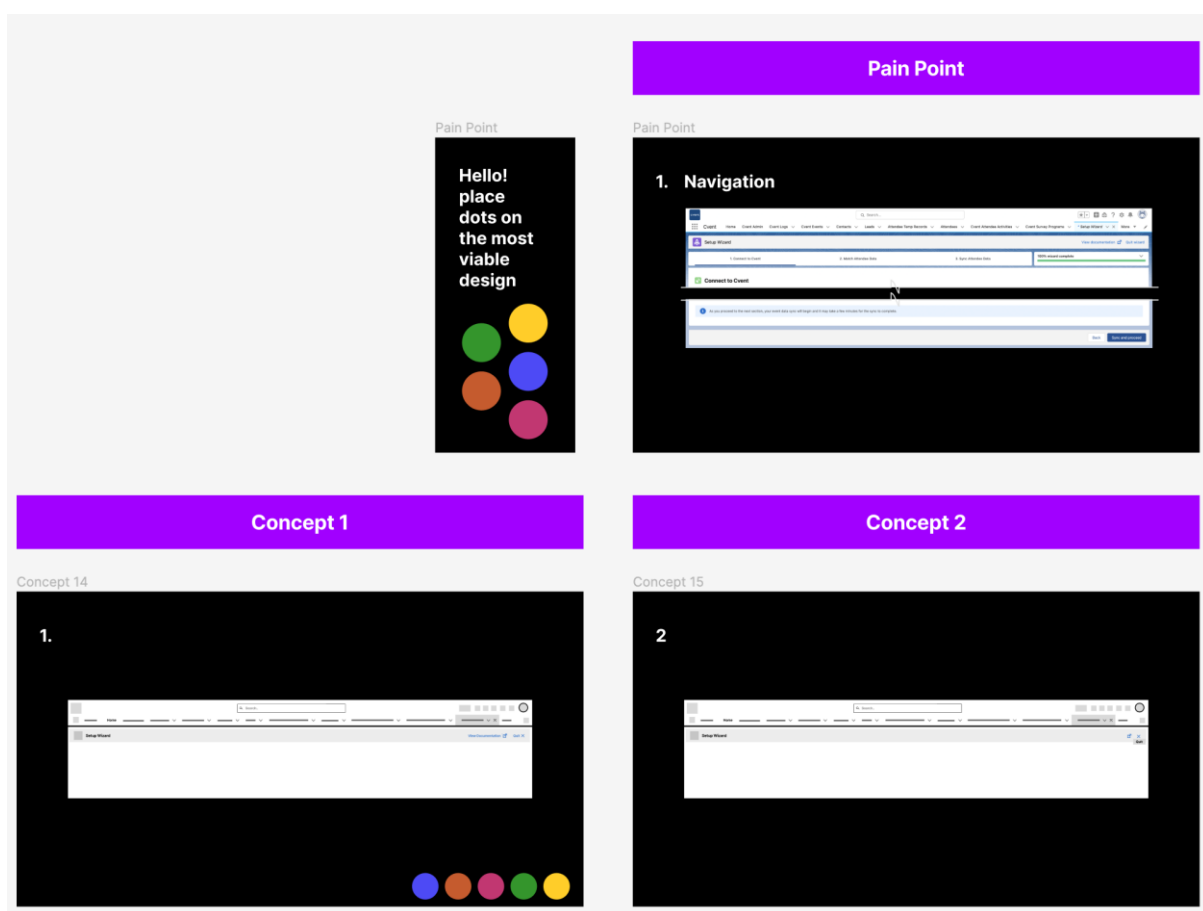


Fig. 2.30 Dot Voting Process

The session along with helping select the most viable design also gave a lot of feedback and insights, which were then incorporated into the final product.

## 2.4 DEVELOP

In this stage the designs created during the ideation phase were developed as a high-fidelity prototype incorporating the feedback and post further iterations. The Salesforce lightning design system (SLDS) was used. Section 1 of the wizard with design enhancements can be seen in Fig. 2.31.

**Connect to Cvent**

Let's connect and then sync your Salesforce and Cvent accounts.  
7 mins approximately

**1 Connect Your Accounts**

- Select your Cvent environment and enter the access token to get started.
- Your Cvent admin should provide the access token and create a test event in Cvent with the integration enabled.

If you don't have the access token, login to your Cvent account and go to Admin > Integrations > Cvent Salesforce App and choose a configuration to copy the access token. Or, share [this guide](#) with your Cvent administrator to help them generate one for you.

**Cvent Environment**  
Cvent US

**Access Token**  
Ap47\*\*\*\*\*

Connect your accounts Connected

**2 Authorize Metadata API**

- This allows the Cvent Salesforce App to access the Salesforce Metadata API on your behalf without revealing your password or other credentials.
- Authorize access to the Salesforce Metadata API to enable the features in the next step. This will allow you to activate other app features as well.

[Authorize metadata API](#)

**3 Retrieve Cvent Custom Fields**

- There are data fields in events and contacts that are customized by your Cvent planner to track and manage events.
- During syncs, the data from these Cvent custom fields is synced from Cvent into Salesforce.

Skip this step if you don't want to sync data from Cvent custom fields into Salesforce right now.

**Retrieve Cvent Custom Fields**  Enabled

**4 Select Cvent Custom Fields**

Select the Cvent custom fields whose data you want to sync into Salesforce.

**Cvent custom fields:**

NAME ↑	SUBJECT ↑	TYPE ↑
<input type="checkbox"/> ONE LINE	Cvent Contact	Text
<input checked="" type="checkbox"/> Comment Box	Cvent Contact	Picklist
<input checked="" type="checkbox"/> Single Answer	Cvent Contact	Text
<input type="checkbox"/> Sync	Cvent Contact	Text
<input checked="" type="checkbox"/> Trista	Cvent Contact	Picklist (Multi-Select)
<input type="checkbox"/> Personalised First Name	Cvent Contact	Text
<input type="checkbox"/> Test 10	Cvent Event	Picklist
<input type="checkbox"/> Personalised Email Address	Cvent Contact	Text
<input type="checkbox"/> Air Photo	Cvent Contact	Text

3 item(s) selected

[Cancel](#) [Retrieve Custom Fields](#)

As you proceed to the next section, your event data sync will begin and it may take a few minutes for the sync to complete.

[Back](#) [Sync and proceed](#)

Fig. 2.31 Section 1 with Design Enhancements



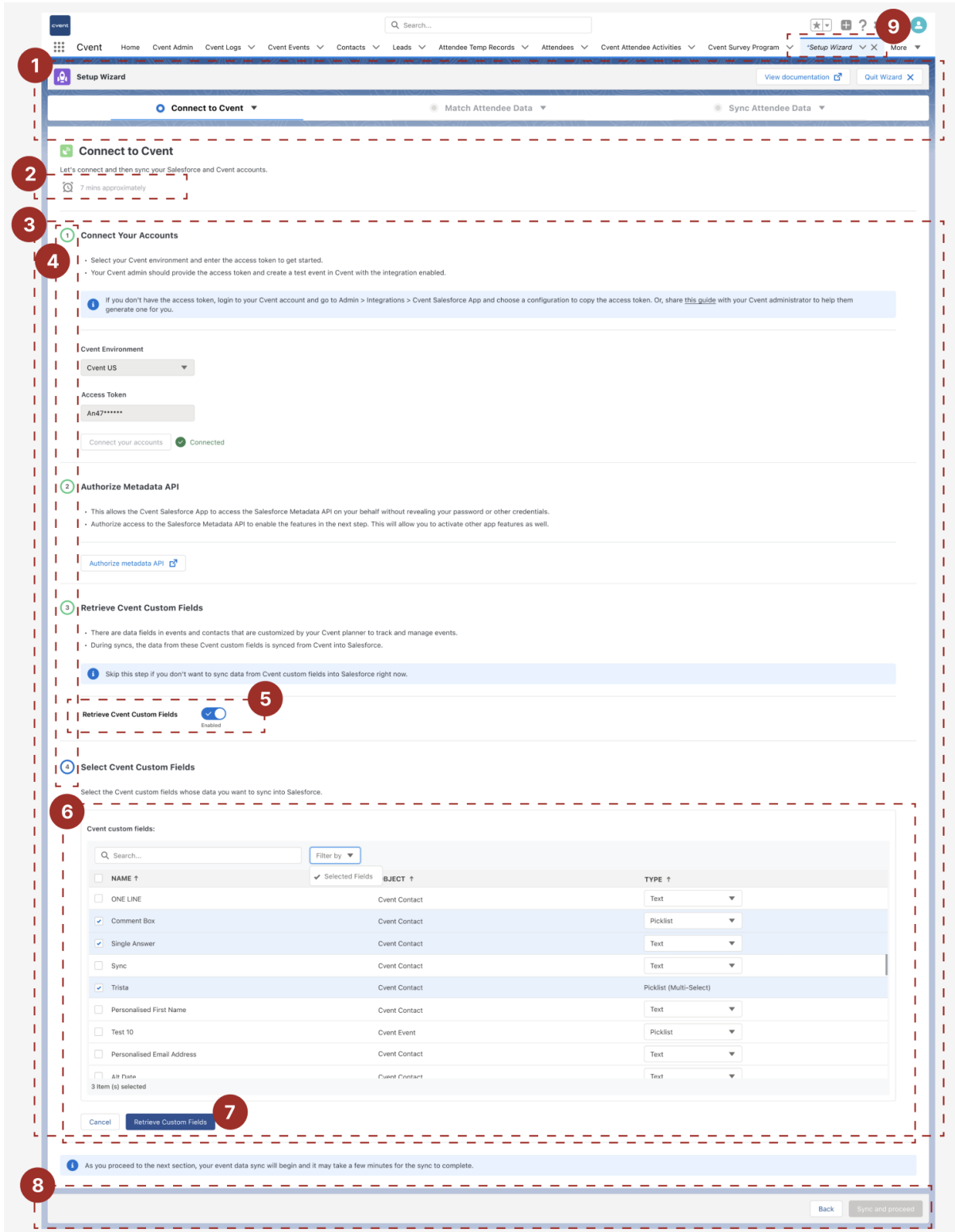


Fig. 2.32 Section 1 with Design Enhancements and explanations

**Enhancements and Recommendations:**

Fig. 2.32 shows the screen of section 1 with all areas of design enhancements marked. The details are as follows.

### 1. Navigation and Progress

- The header with Setup Wizard mentioned had links to quit the wizard and to go to the documentation. Those links have been converted into more visible, attention grabbing and intuitive buttons, so that the user does not feel lost or confused when they want to quit the wizard.
- Under the headers, the internal navigation bar along with the progress bar has been given a major uplift. The progress bar has been removed which gives more real estate to the tabs as progress updates (the green ticks) and drop downs have been added to the tabs itself. The drop down allowing internal navigation was added as it was appreciated in the current design. Along with this, visual hierarchy was added to the navigation bar, with a bigger text size.
- The progress bar in the current design is placed at the top right corner. Due to technical limitations, it can only track section progress and not the step-by-step progress. So, it shows progress as 0- 33 - 66 and 100. Moreover, once the setup is complete, it stays there showing 100 percent progress, which is confusing. Therefore, section wise progress has been added on the tabs itself. It also shows the current state of a section. Blue icon indicates that the section is being worked on, green indicates the section has been completed and grey indicates that the section is currently disabled, and will be enabled when the previous section is completed.

### 2. Text Reduction

In the general information section of the sections, icons have been added as an attempt to reduce the written text.

### 3. Information Hierarchy

- In the current experience, the steps title is followed by a description of the step, followed by the task to be done and then information text related to it. The question arises that what will a user do with an information text, once they have already completed the task. It is therefore recommended to rearrange the information in a manner that the step title is followed by the step description, then the information text and then the task to be done. Also, in some steps, information texts have the exact same information as the description text, so those have been removed.

#### 4. Step Progress

Currently, step by step progress tracking is not possible due to technical limitations, However, if it is at some point possible it can be shown as color variations on the step numbers itself. As in the tabs, green indicates the step has been done, Blue indicates that the user is on that step, and grey indicates that the user has not yet reached that step.

#### 5. Toggle Behavior

In the current experience, toggles switches are used at a lot of places. The UI of these switches confuses the user, as a NO is written on the right. The NO made the users hesitant to click on the toggle. The recommendation here, is firstly to have a more intuitive and informative toggle switch so that the user is making an informed decision. Here enabled and disabled has been mentioned under the toggle.

#### 6. Table Behavior

The retrieve Custom fields table, had a long search bar, and the cross appeared in one corner, posing a usability issue. The selected fields were highlighted in the same color as the table header and there was no way of reviewing the selected fields together. Therefore, as a recommendation, the length of the search bar was reduced. The color of the selected fields was changed so that they stand out and a filter was added to view the selected fields together as required as an additional feature.

#### 7. Task sequencing- Retrieve Custom Fields CTA

The retrieve Custom fields tables appear once the toggle is switched on. Here the user selects the fields and retrieves them. The Secondary CTA at the bottom of this table was missed by the Users, as they directly clicked on the CTA on the Footer. The Secondary CTA has been changed into a primary CTA, so that it is not missed.

#### 8. Task sequencing- Footer CTA

It is recommended to disable The Footer CTA until the user has completed the step. The same has been applied to the other sections as well. This encourages the user to follow the step chronology, thus reducing errors.

## 9. Setup Wizard Tab

The Setup wizard tab on the main page navigation, when closed, does not notify the user that they are quitting the wizard. This is just another method in which the user can exit the wizard, however in the current experience the user is not asked to confirm whether they want to continue or exit the wizard. This could lead to errors and subsequently a bad experience for the user. Hence it is recommended to have a modal appear upon clicking on the cross to close the tab as well.

The screenshot displays the 'Setup Wizard' interface for 'Match Attendee Data'. The main content area is divided into two sections:

**1. Set Up Field Matching**

Here, you can choose which fields to use for matching Salesforce records with Cvent contacts. To match fields, set the condition requirements and logic for the fields that you choose to add. Once matching is complete, records will be updated or created according to the matching rules you choose in the next step.

**Contacts**

#	SALESFORCE FIELD	SALESFORCE DATA TYPE	CVENT CONTACT FIELD	CVENT DATA TYPE
1	First Name	STRING	First Name	STRING
2	Last Name	STRING	Last Name	STRING
3	Email	EMAIL	Email	EMAIL

Condition Requirements: Custom Condition is Met. Condition Logic: 1 AND (2 OR 3)

**Leads**

#	SALESFORCE FIELD	SALESFORCE DATA TYPE	CVENT CONTACT FIELD	CVENT DATA TYPE
1	First Name	STRING	First Name	STRING
2	Last Name	STRING	Last Name	STRING
3	Email	EMAIL	Email	EMAIL

Condition Requirements: All Conditions Are Met (AND)

**2. Select Matching Rules**

Here, you can choose what actions will occur in Salesforce for the different types of matches with a Cvent contact.

**Single Match**

Action: Update the matched Salesforce record

**Multiple Matches**

Action: Only update the matched related record

**No Match**

Action: No Action

Fig. 2.33 Section 2 with Design Enhancements

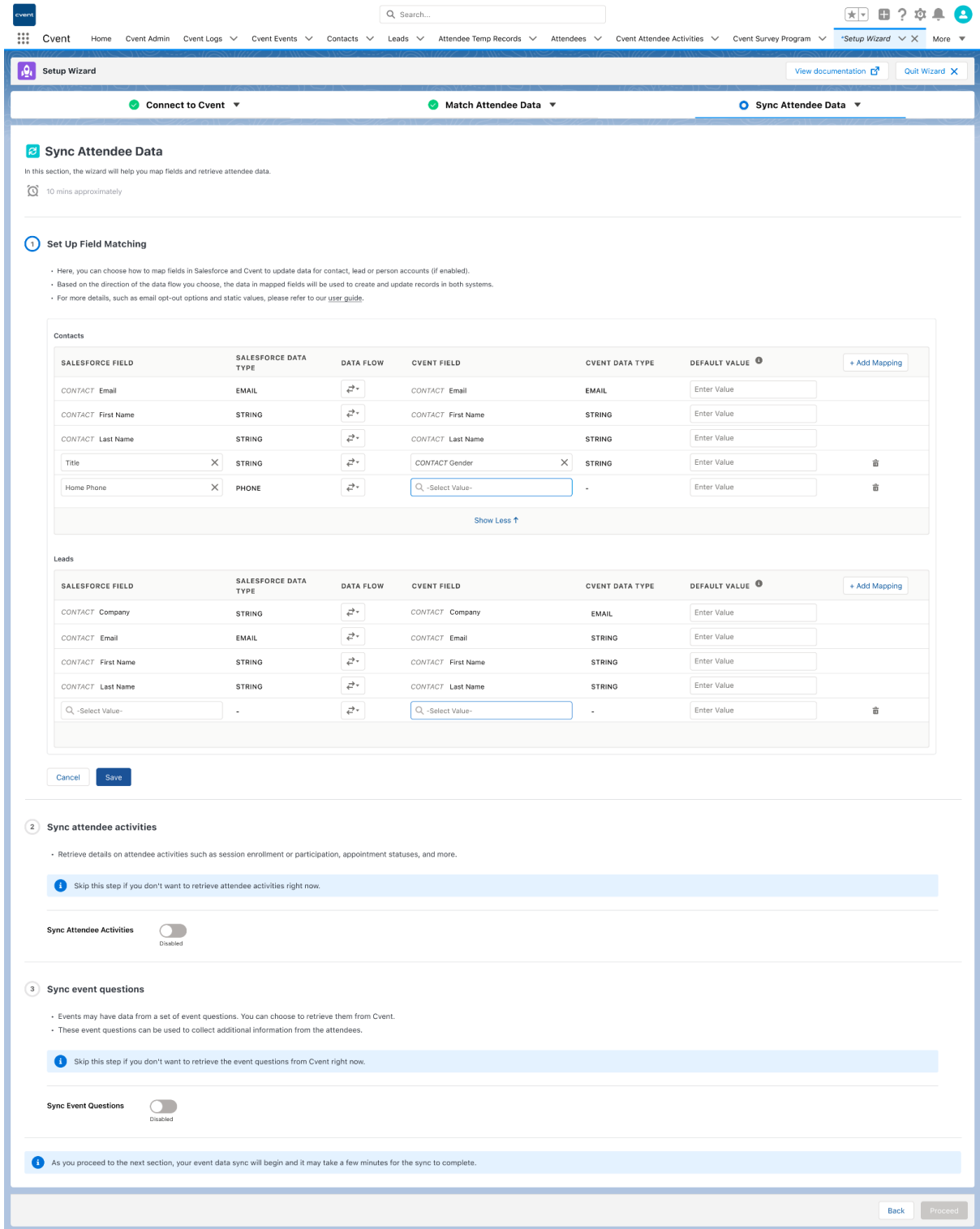


Fig. 2.34 Section 3 with Design Enhancements

The screens of the other sections are shown in Fig. 2.33 and Fig. 2.34. All the design enhancements mentioned above have been applied to the other sections as well.

## 2.5 TEST

The designs created throughout the duration of this thesis are in the process of being tested with the stakeholders belonging to the Product teams, App Support, Client Success and Sales engineering teams. A lot of test dry runs were conducted with the members of the UX India team by the researcher to check the flow of this testing process.

A moderator guide focusing on what aspects of the design are to be tested with the participants along with the way to take the session forward has been created

### Moderator Guide

#### Welcome ( 45 min )

Today you will be looking and interacting with few new screens of the new setup wizard in SF. There are few screens designed on the basis of research conducted a while ago, and these are going to be static screens | they do not have full functionality, but your feedback will provide us with invaluable insights on how to take these designs forward.

- You'll interact with a work-in-progress design concept and I will be asking you questions along the way.
- Share what you like or dislike. There are **no right or wrong answers**.
- You will not hurt our feelings by giving us open and honest feedback.

*Start recording...*

#### Section 1: Feedback on screens

Setting Context:

Ok, let me present you the screens and to begin with I would like you to imagine you are SF admin who is setting up the client account. There are 3 steps in setup wizard you are on the 1st section which has subsections in it. I would like you to take a look closer to identify what sub section (steps) you are at , **what is your progress?**

**PROBE** if yes or no mentioned by respondent:

1. Yes - How did you identify it?
2. What do you feel about the highlighted area ?
3. What does the color code mean to you? Does it imply anything ?
4. No - Can you take a look closer to each section ? I would like you to try and identify Anything that is distinguishing them ?
5. What do you think feel about them ?
6. Do you have any suggestions that we can use to improve them?

Q2- Great { acknowledge }! Ok so now if I tell you to quit the wizard can you tell me how would you do it ?

**PROBE** if yes or no mentioned by respondent:

1. Yes - Great, how did you spot the quit option, what helped you ?
2. No - Take a look at the top right, What you think about it?
3. What can make it better?

Fig. 2.35 Part of the Moderator Guide

The findings and insights from the testing will be incorporated into the designs with iterations and more feedback.

## **CHAPTER 3 CONCLUSION**

### **3.1 IMPLEMENTATION ROADMAP**

The first version of the Cvent Salesforce App setup wizard has been launched to the new users of the Cvent Salesforce App in March beginning. Since then, there have not been a lot of users engaging with the wizard. As a result, getting the actual user's feedback on the current experience has been a struggle. This project and thesis have focused on improving the user experience of the Setup wizard based on UX standards, Usability studies and Evaluation. The enhancements and recommendations of this project have the potential to make a significant impact on the experience of the wizard. As a part of the roadmap ahead, the final designs will be presented to a team of Product designers, Content designs and User researchers for their feedback and insights. The results from the concept testing will also be incorporated to make the product experience efficient for the Salesforce Admins, by making them self-sufficient and reducing any kind of dependencies. Upon subsequent iterations and feedback sessions, Designs will also be presented to the Product Managers and Developers for their view, feedback and thoughts. The idea is to understand the product and designs from feasibility and time stand point as well.

The implementation may or may not consist of all recommendations and enhancements. So, the process ahead will be to document the entire project for easy access and reference to all stakeholders. Based on the actual user's feedback and the research of this project, further versions of wizard can be created and implemented, keeping the user and their experience at the center point.

## 3.2 CONCLUSION

Events are important for the marketing of a product, celebrating employees and achievements, getting new customer base and leads etc. Measuring the impact of these events is equally important as events involve lots of efforts, finances and planning for any business or planner. While Cvent is a one stop solution for all event planning and management requirements, The Cvent Salesforce App is one source of truth of all event insights, ROI and success measurement for businesses. Measuring ROI and impact of events not only benefits the business in gauging success but also lays the foundation of improvement across all areas of an event, product and customer experience. With the help of the Cvent Salesforce App, planners can utilize the various features and functionalities to get valuable and actionable insights on all events and attendee activities to help serve the customers and clients better. Introduction of the App setup wizard to simplify the Setup and configuration process of the Cvent Salesforce App, will reduce time, effort and dependencies for the admins, which in turn will help business by improving workflows.

The Setup wizard, as explored in the discovery phase of this project, has tremendously simplified the old setup process. It has successfully reduced the time and effort required by the Salesforce Administrator to set up the app, while also making it easier to understand, with all required and necessary information in one place. This is one step towards making the Salesforce Admin self-sufficient and reducing any dependencies on Cvent and support teams. The research conducted during the project emphasized on evaluating the first rolled out version of the Cvent Salesforce App Setup Wizard, native to the salesforce Platform. Pertaining to the challenges along the way and the adoption of the heuristic evaluation of the wizard gave valuable insights on the shortcomings of the wizard. It highlighted the usability issues and UX limitations that could be a hindrance to a great experience of the wizard. Most of the findings of the research were related to errors probability, mis-interpretations of UI elements, Navigation and inconsistencies with information structuring.

As one of the challenges was to work with the available resources and no actual users, the findings and hence recommendations are mostly focused on reducing usability issues and making the wizard experience rich and efficient. While defining the problem statement and scope for the project, some findings which required more effort and time, or more technical



knowledge were left untouched. These however, can be picked up at a later stage as they do impact the experience of the Wizard. Another challenge of the project was to work with technical limitations and limited technical knowledge. This had an effect on the exploration of feature enhancements as there were feasibility and implementation issues on the back end. The project has successfully inculcated the ability to work with constraints and limitations.

Looking back, the intent and aim of this project was-

*“To enhance the current experience of the wizard by resolving usability issues and providing features that add value to the setup process for the admins by making them self-sufficient.”*

The design thinking process followed in the project to create the end product based on the research findings and quick and early feedback has helped achieve the intent to an extent. The recommendations for enhancements provided towards the end of the thesis, aim to reduce any usability issues, add features of the ease of the users, and make the existing UI components, CTA's and buttons more intuitive and informative in order to reduce any scope of errors and increase productivity. The project could have an increased impact with the actual user's feedback and experience of the new Wizard.

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