

Jigsaw Customer Research Debrief

7/30/2010

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USEREXPERIENCE

salesforce



Interview Details

Interview Dates

6/25/2010 - 7/13/201

Objective

Mostly focusing on *search*:

- Understand the needs and pain points of current JDF customers.
- Understand how sales people uses other tools than JDF for data management and their pain points.

Participants

- 3 externals: Inside Sales and Sales Ops Manager. Director of Business Intelligence & admin. AE.
- 3 internals: 2 EBRs and 1 SR

Materials

[Interview Questions and Notes](#)



Use cases we heard for *search*

- Adding new contacts for cold calling
- Develop new contacts to create opportunities
- Follow up with leads that have shown interest on the website
- Get as much information as possible about the lead to forward to the AE or EBR



A light blue, stylized cloud shape is centered on a solid, darker blue background. The cloud has a soft, gradient-like appearance with a white-to-light-blue gradient. The text "Pain Points" is written in a bold, black, sans-serif font, centered within the cloud.

Pain Points

Jigsaw.com login fail

All users failed to login to jigsaw.com on their first try. Login credentials were incorrect.



Please Log In Again

Your email address and/or password could not be found. Please try again.

Please log in to continue

Email

Password

Keep me logged in | [Forgot your password?](#)

Log In





Jigsaw fields on layout

When asked users were confused or didn't understand the different sync status fields on the layout.

▼ Jigsaw

Sync Status   Up To Date

Duplicate  None Found

Update Status  Unlocked

Graveyard

Jigsaw Sync Activity

Sync Status Backend |



Custom links on layout

Custom links went unnoticed.

Most of them are not used, users didn't realize the shortcuts.

Custom Links	Update Lead/Contact from Hoovers	CS Territory Map	BlackTab on NA
	Update Lead/Company from Hoovers	FS Territory Map	Black Tab on EMEA
	More Hoover's Information and Tools	vCard	Black Tab on AP
	Signup this Lead - Professional Edition	SIC Code - Industry Mapping Reference	Update from ZoomInfo
	Signup this Lead - Contact Manager	Create Partner Lead	View Company Profile
	Google		Qual Notes in Japanese
	Create "Left Voicemail" Task		
	Create Genius E-mail		
	Genius History		
	Launch Genius Tracker		












Search results

No easy way to filter the **dupes** and **graveyarded** records.
Users don't want to see the **records older than 6 months**.
Also, they don't want to see the company if it has **0 contacts**.

*"I wouldn't be buying the same name again, why would I, doesn't make sense."
(Makeash Subramaniam - AppAssure)*

Customize Columns Show 1 - 25 of 22,404 Page 1 | 2 | 3 | 4 | 5 ... | 897 Next>

Filters: Max # of results:

<input type="checkbox"/> Title ▾	G Name	Company	Country	City	Zip
<input type="checkbox"/> York Information Tec...	Nunez, Steven	ICAP Plc.	USA	Jersey City	07310-1401
<input type="checkbox"/> Worldwide Informatio...	 Olavarria, Enrique	Atmel Corporation	USA	San Jose	95131-1034
<input type="checkbox"/> Windows Systems Mana...	 Ceck, Sherry	Montana State University	USA	Bozeman	59717-3240
<input type="checkbox"/> Windows Systems Admi...	 Hart, Ray	Monster Technologies Worldwide, Inc.	USA	New York	10017-6711
<input type="checkbox"/> Windows System Engin...	 Endahl, James	FICO	USA	Minneapolis	55402-3232
<input type="checkbox"/> Window Server System...	 Hahn, Jacob	Montana State University	USA	Bozeman	59717-2440
<input type="checkbox"/> Window Industry Tech...	 Greenzweig, John	H.B. Fuller Company	USA	Saint Paul	55110-5146
<input type="checkbox"/> Weekend DATA CENTER ...	 Grant, Norman	Visiting Nurse Service of New York	USA	New York	10001-1810
<input type="checkbox"/> Webmaster and Assist...	George, Mrs. Christi...	University of West Alabama	USA	Livingston	35470
<input type="checkbox"/> Warehouse Informatio...	 McDonald, Wanda	Fayetteville State University	USA	Fayetteville	28301-4252
<input type="checkbox"/> Warehouse Informatio...	Hults, Joe	ABC Fine Wine	USA	Orlando	32824-7904
<input type="checkbox"/> Videoconference Netw...	 Rodger, Albert	Morrisville State College - State University of New York	USA	Morrisville	13408-0901

Can't find local addresses

No support for local addresses, reason not to use auto-update.

"No sales happen at the HQ level." (Len Scaffidi - Tooling U)

Search Search Limit to items I own

Scope: All Objects | [Advanced Search](#)

[Accounts \(25+\)](#) | [Leads \(25+\)](#) | [Cases \(2\)](#) | [Tasks and Events \(1\)](#)

Accounts [25+] [My Columns](#)

◀ Previous Page (1-25) [Next Page](#) ▶


Action	Account Name	Account Site	Phone	Owner Alias
Edit	General Electric - Aerospace - Cardiff, Waless, UK		+44.1443841041	Scaffidi
Edit	General Electric - Chesapeake		+1.757.485.2666	Scaffidi
Edit	General Electric - Energy - Atlanta		(770) 859-6000	Scaffidi
Edit	General Electric - Simpsonville, SC		+1.864.228.9036	Scaffidi
Edit	General Electric - Healthcare - Madison, WI		(608) 221-1551	Scaffidi
Edit	General Electric - Water and Process Technologies - Trevoze, PA		(215) 355-3300	Scaffidi
Edit	General Electric - Aerospace - KY		(270) 825-6456	Scaffidi
Edit	General Electric - Aerospace - Stuart, FL		(561) 286-9300 NO NUMBER	Scaffidi
Edit	General Electric - CBL Schenectady		315-391-9794	Scaffidi



Search categories

Industry and **title** categories are not working well.
The results are mis labeled.

Users click on every name and look at the details.



Title

Company

Email

Industry

Select All | None

- Select-
- Agriculture & Mining
- Business Services
- Computers & Electronics
- Consumer Services
- Education
- Energy & Utilities



Other search problems

*"Jigsaw usefulness depends on region you're working in, sometimes doesn't have the data for your region"
(James Leigh - EBR)*

No accurate D-U-N-S number > need Hoovers for that

Westminster City Council

Westminster City Hall
64 Victoria Street
London, SW1H 0HY, England
United Kingdom ([Map](#))

Phone: +44-020-7641-6000

<http://www.westminster.gov.uk>

What has Hoover's
done for you lately?

Find Out Now

COMPANY RECORD TOOLS

- Download Company Data
- Build Custom Report
- Find Similar Companies
- View Quick Report
- Watch This Company

Print This Page

E-mail Link to This Page

LINE OF BUSINESS

City Council

KEY INFORMATION

D-U-N-S Number	229845206 Buy a D&B credit report.
Company Type	Private Headquarters
Year Of Founding or Change In Control	1963

Family Tree




Lead de-duping

Manual check for a dupe. Lots of accounts with the exact same name, time consuming to find the right one for the lead.

Can't "link" multiple leads from the same company to be managed together. Need to copy the same info multiple times.

Lead [Help for this Page](#)

 james sule - Search for Duplicates

Name james sule


Last Name sule

Company syntax

Email js@syntax.co.uk

Email Domain @syntax.co.uk

Phone 0207 307 5006

 Matching Leads

<input type="checkbox"/>	Name	Title	Phone	Company	Email	Number of Potential Users	Lead Status	Owner Alias	Last Activity	Created Date
<input type="checkbox"/>	james sule	Systems	0207 307 5006	syntax	js@syntax.co.uk		Open	abrat		13/07/2010
<input type="checkbox"/>	Ayman Al-Och	MD	00442073075000	Syntax Integration Limited	ayman@syntax.co.uk		Partner Interest	rcare	12/03/2004	11/03/2004
<input type="checkbox"/>	Tim parker	Director	020 7307 5008	syntax	tim.parker@syntax.co.uk		Archived - Non-responsive	ptobj	20/03/2009	10/03/2009

Import & Drip

Dripped leads need cleanup. New leads don't go through lead assignment rules.

Can't import directly from jigsaw: fields match conventions, additional fields need to be filled in before import.

Some use People Import, some excel.



A light blue, stylized cloud shape is centered on a solid, darker blue background. The cloud has a soft, gradient-like appearance with a white-to-light-blue gradient. In the center of the cloud, the text "Other tools" is written in a bold, black, sans-serif font.

Other tools

Used & mentioned


- Hoovers
- Onesource
- insideView
- LinkedIn
- iProfile
- company website
- google
- igoogle
- CompleteHouse.gov



Why they're used? What's missing in JDF?

- Cross check information
- Get other information: number of employees, D-U-N-S number, SIC code, end of fiscal year
- LinkedIn perceived as the most up-to-date because it's entered by the person
- Latest news
- Research information about the company





Summary & Recommendations

Full list of pain points

- Jigsaw.com login fail
- Jigsaw fields on layout is confusing
- Custom links on layout are clutter
- Don't want see duplicate, graveyarded and old records in search results
- No support for local addresses
- Unreliable search categories (results are mislabeled)
- Some regions are not well supported
- Lead de-duping is painful
- Importing is a long process
- Some important information (DUNS #, SIC code) are missing in jigsaw
- No news about the company
- Can't do research about the company



Recommendations

- **Jigsaw.com login fail**

Remove the need to login to the website.

- **Jigsaw fields on layout is confusing**

Remove the fields only admins need.

Don't make users interpret things, indicate only what they need to know: old/dupe/graveyard.

- **Custom links on layout went unnoticed**

Assume users don't customize their page layout, have the actions in context. ie:

Get more contacts button in the contacts related list.

Or make it dumb easy to customize.

- **Don't want duplicate, graveyarded and old records in search results**

Hide them by default on search results, add it as options on the filters pane.



Recommendations

- **No support for local addresses**

Add some fields to the account detail to better support the local addresses, and so it integrates well with jigsaw search and users can adopt them instead of creating their own naming conventions.

- **Unreliable search categories (results are mislabeled)**

Better matching, prevent mislabeling.

- **Some regions are not well supported**

- **Lead de-duping is painful**

Account lookup in Lead detail page.

Surface dupes on the detail page, to remove the need to check every time.

- **Importing is a long process**

Integrate other required fields in the importing flow.

Better admin tools for field mapping.



Recommendations

- **No news about the company**
- **Can't do research about the company**

Account detail page 2.0 > include news and research information about the company.



Thank You!

Questions?

