CD&M Mobile App Question List

THE USER:

1. What does a sales rep do for CDM?
   What are your goals/metrics for the year?
   What are the day-to-day mechanics?

   -Face-to-Face contact, build client relationships. VP's hold the highest level of the relationship.

2. Who are the users and how will they use it?
   What is the first task needed?
   What do you need from this app?

   -The users are at all levels. Administrative up to VP level
   -Information at your fingertips

3. What are the primary/secondary/tertiary tasks?

   -Primary is to give the at a glance information to the sales rep.
   -Have the most up to date information

4.What constitutes value? What do they need to show?

   Something that has the core hot points for the week.

5.What do you want to show to the client first?

   We would want to share video with the client. Not necessarily share it via the mobile device we are using but share it via email.

CONTENT:

6. What's the first thing you want to see?
A possibility that a blurb can be placed at the top of the page as the user opens it. IT could be a value statement that gives everyone the overarching statement for the week or for the month. Either way the first thing the team sees is a statement, and then a dashboard with hotlinks.

Where are the **cocktail points** coming from?
   How often are they updated?

   -Access points of information.
   -Cocktail points come from various areas that has already been written. Cocktails points are typically typed meeting notes that are captured every Wednesday and shared the following Monday via email.

7. What do you want to see in your **calendar** view?
   Is it part of the dashboard?
   Where is the data from?

   The calendar information can be apart of the dashboard. The calendar hosts a list of series of events that the sales team would attend or should know about when talking with a client.

8. What is a **briefing book**? What's in it?

The briefing book contains photos of major key players in the industry. In additional it has key points about the person. Typically this is used for high-level executives.

8a. The briefing book should be expanded to more than just clients, it should be industry executives.

9. What level of visibility do you need for **contacts**?
Local or global to view?

A global view from the s-link would be helpful. Name, email, address, as the musts, but the conversation around what's specifically needed can happen once we document it.

9a. The contacts should contain birthdays, information on kids.

10.How do you use **MediaSilo, Affliate, S-Link**?
What is relevant in terms of content?

The sales team doesn't use media silo a lot. The sales team uses affiliate and s-link the most.

TECHNOLOGY:

11. What does a client meeting look like?
Does information need to be displayed from the app?

A meeting can take place anywhere. It can happen while you're in an elevator and would like to cease the opportunity to talk to a potential client or someone you already have a relationship with but is in the same place as you.

12. What are the benchmarks in the industry?
What other industries? Anything else he has seen? (competitive analysis)

Disney and fox both have apps that function the way this app has been tasked to function. It's a tremendous help for them in talking with clients and having a robust tool that keeps them all speaking the same language. Disney is known for being very precise in the language they speak and share with the public.

13.What does the mobile landscape look like? Iphone/android/BB
-Iphone is the most used mobile device.

How tech savvy is the work force?

70% of the sales team is on Iphone. The technology is well adapted within the group.

14. Does the client want Archival?

14a. The archival should be of the cocktail points and one-three months is substantial for archival.

15. CD&M Design should be consistent with the CD&M circles.