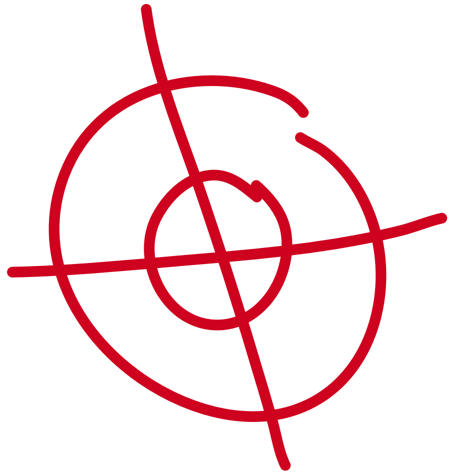
KWCommand Case Study

Chris Gareffa | UX/UI Designer



Introduction

My name is Chris Gareffa and I am a Market Center Tech Trainer / Labs Advisor. Currently, I work with some of the top MCs in the world in New Jersey. The objective of this case study was to survey agents on their Command usage and find any pain points it causes. All agents survey used Command 100% for compliance.

Role: UX Researcher / UI Designer **Time Frame:** 2 Weeks **Tools Used:** Figma / Adobe XD

Problem Statement

The problem I suspect is agents want a quicker way to do compliance in KWCommand. Currently, they are finding it a bit difficult or cumbersome to use. By eliminating steps in the current KWCommand iteration, it will save agents time and lessen stress.

The Research

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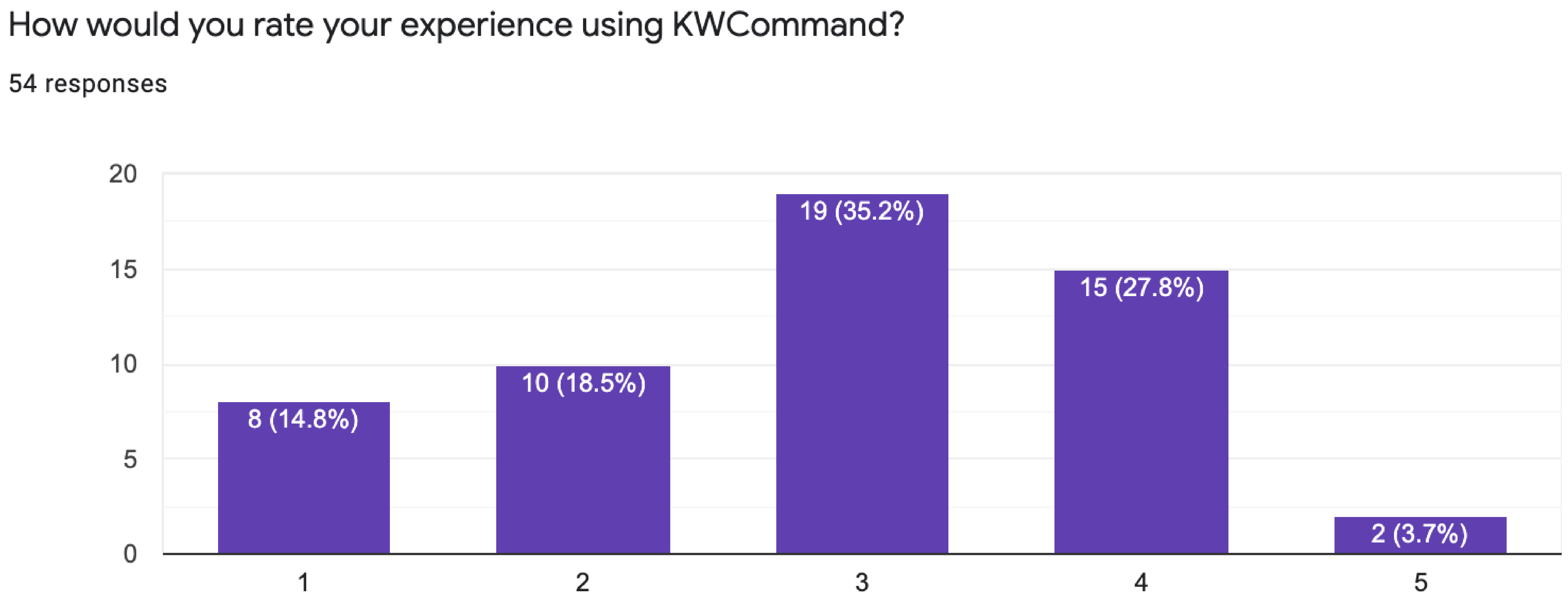
- A survey for the agents was provided via google forms to find out how the agents are using KWCommand for their compliance.
- Questions were asked in regards to the opportunities workflow and how easy or difficult it was for them to complete a transaction.
- The feedback from my survey was used to help come up with possible solutions to the agent pain points.

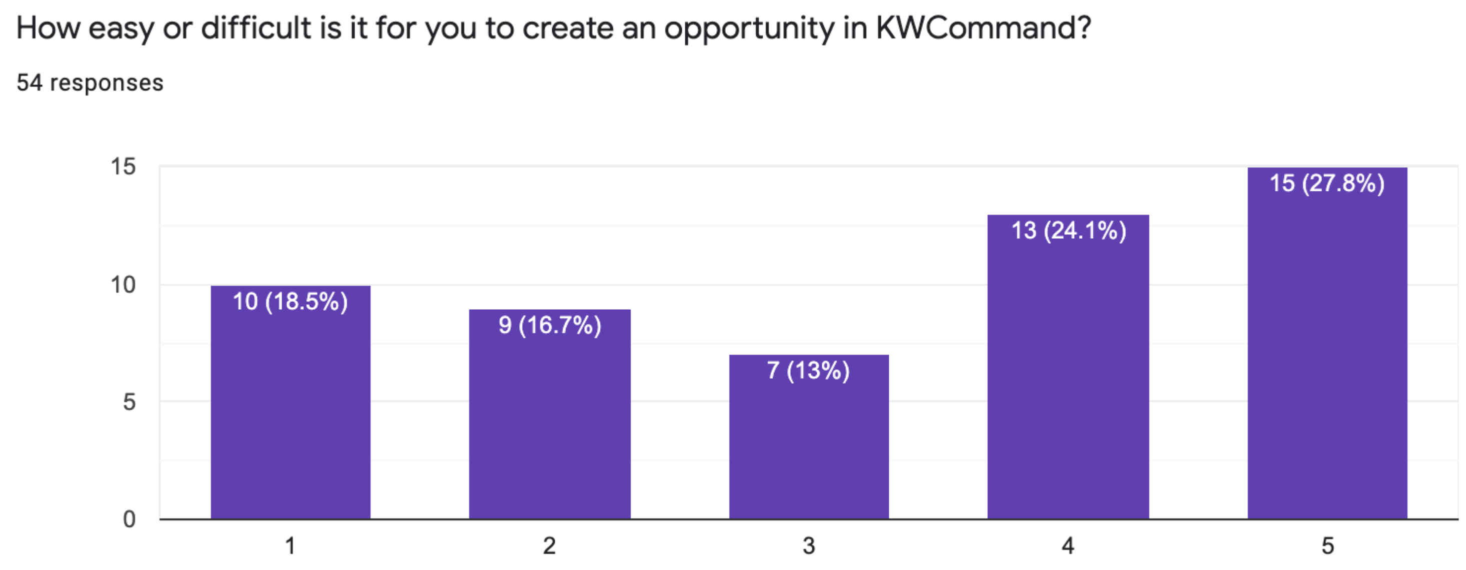
Survey Results

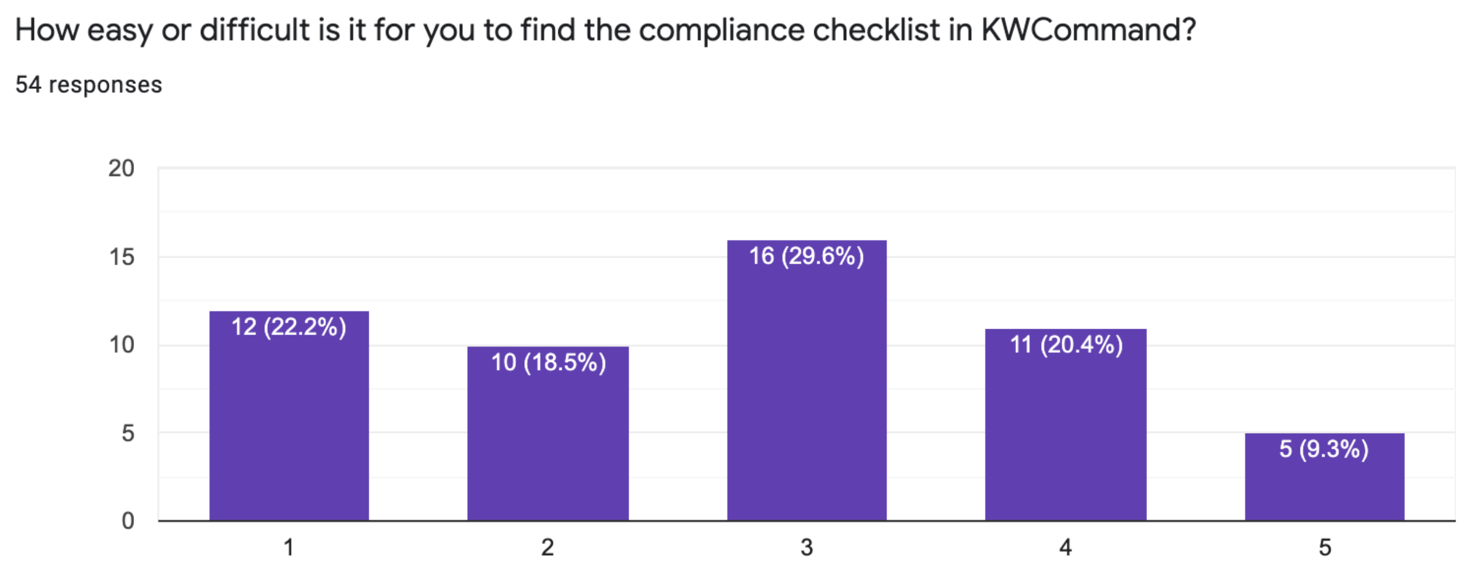
Survey Results - Command Experience



The first question I asked on my survey was to get actual data on how experienced the user was with Command. **The scale is based from 1-5, 1 for a beginner up to 5 for a power user.** The results we see are, in fact, the majority of surveyed agents are experienced in command or at least display a decent amount of skill in using it.

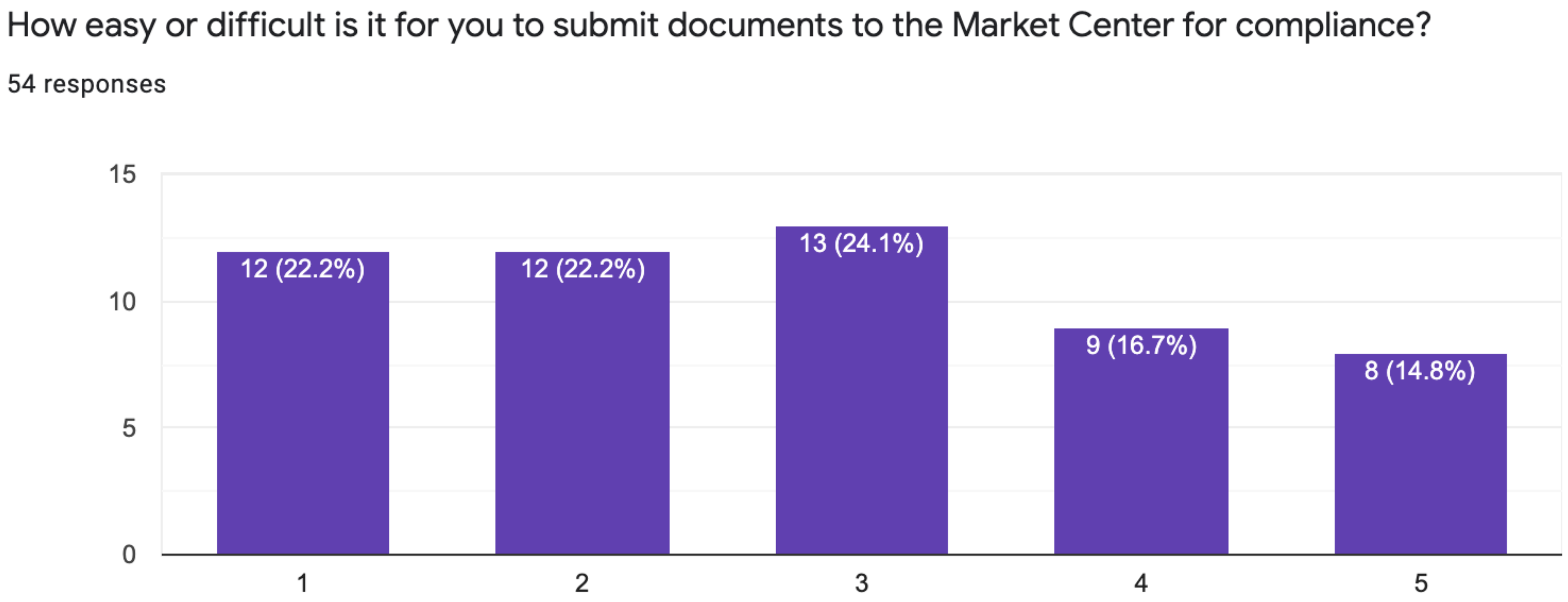
Survey Results - Compliance





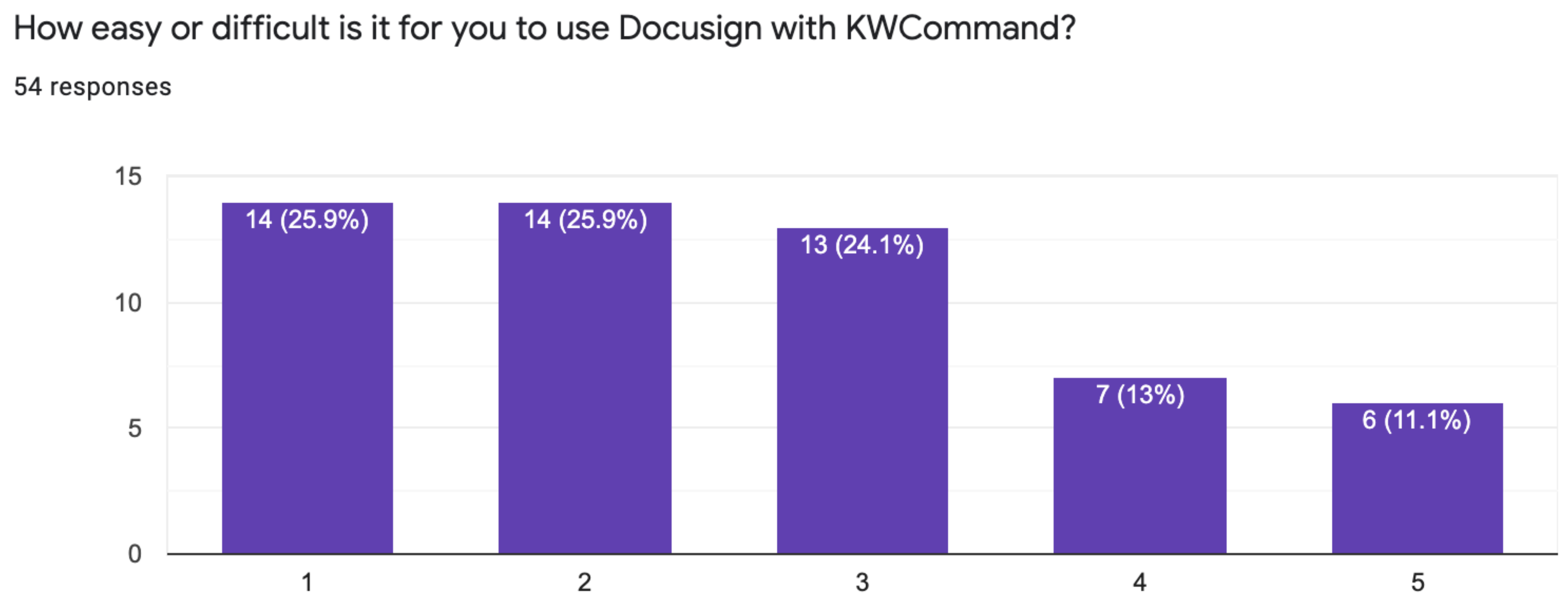
Using the same scale (1 = harder, 5 = easiest), I asked agents about their usage with opportunities and compliance checklists. We can see that while creating the opportunity was generally easier, finding the compliance checklist was mixed across the board.

Survey Results - Compliance Submission



The results were more towards being harder here. Written feedback is agents would like the documents to automatically sync to their form checklist once completed in a signing agent like docusign. There was also some confusion on finding specific checklists, since each checklist includes different docs to submit.

Survey Results - Docusign



Using the same scale (1 = harder, 5 = easiest), I asked agents about their usage with Docusign. This was skewed more towards harder, as we can see. The written feedback was more about Command's workflow to docusign vs. usability of docusign. All of the surveyed agents are 100% in Docusign now as we transitioned out of Dotloop.

Affinity Mapping

With Affinity mapping done, I was able to get better insights into the pain points agents were facing. There was an overwhelming amount of feedback in regards to the workflow of Command. Many of which were ‘too many steps.’ There was also a good amount of feedback providing ideas, and a marginal amount of feedback about DocuSign specifically.

Affinity Mapping Results

Workflow

I am very familiar with Command & Docusign. There are Way too many clicks to accomplish anything.

WAY too many steps & required fields. Way too many pages. Doesn't work for teams. Not easy to just go in and edit a contract.

There are so many steps and very hard to find signed documents and keep organized

You can only upload one document from your computer at a time, and you have to go through a cumbersome uploading and naming process (addendum, agreement, etc...) for each document.

Doesn't populate so great- can't see my forms in dousing till they are in command - a lot of double work between 2 platforms

Too many steps. Two platforms is cumbersome. Tom much data entry.

Waaaayyyyyyy too many tabs and screens! Everything seems to take twice as long to process. Can't rename files - really annoying and can only upload files from computer one at a time.

Having to load documents for each stage of compliance from docusign to command. Seems like double work. And you can't email documents to an opportunity like you could do with dotloop.

Hearing my transaction coordinator constantly complain that it is not user friendly, too many steps. In fact, I will forward this survey to her. For myself, I will not use it because the app doesn't support efficently running my business the way dotloop does.

Toggling back and forth between company and docusign, having to add documents from docusign into command, docusign / command not being mobile friendly!!!

Takes too much time - too many steps back and forth

Too many steps.Still seems like glitches happen.

Less steps to complete a transaction would be ideal. Also, difficult to make changes once a client has signed a form. Every time you have to resend something to a client you have to create another Envelope. Too time consuming. A send button on the forms you want to send would be so much easier.

Not having to download and reload all documents from docusign back into Command

Too many steps to create an opportunity. Too mnay required fields b4 u know for sure (under contract). Compliance lists do not always give thrle required documents as I see it...for instance, no informed consent, etc

Ideas

Less steps. A way to see clear progress steps or a static checklist from screen to screen. More auto populating fields would help too.

My assistant Jackie does a lot too, so I am going to make sure she does this as well. But did I mention there are too many steps??? I want direct one click access to my deals. One suggestion - in opportunities, can they be listed in the most recently used order?

Have the e-signature within Command. I know the programs speak to each other but too much back and forth, clicking tabs, documents are stored in both DocuSign and Command. We did 75 transactions last year - it's already so time-consuming for me, not a good use of my time.

I would love to see a change when creating a contact, I would like it if once you entered the contact basic information, you were then taken to the more detailed section so that you can populate the neighborhood information, create smart plans, saved searches, and other details more seamlessly.

When adding documents from my computer into Command, you can only add 1 at a time. It would be easier and efficient if you could add multiple documents all at once and have them show up individually into the folder I chose.

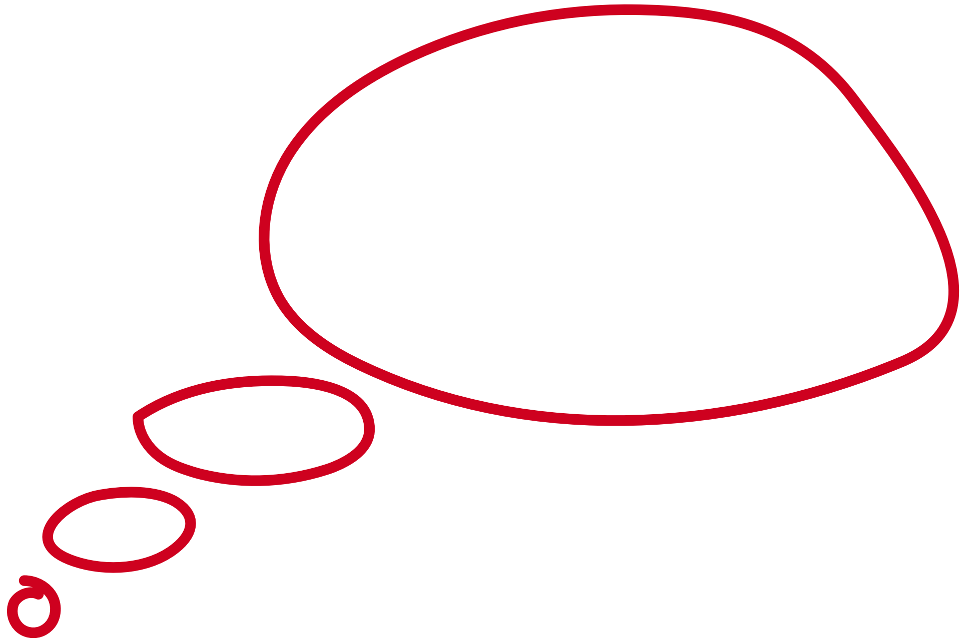
I would love the ability to delete placeholders in Command for 'Optional' or 'Conditional' items (e.g., 'Receiving Referral Outside KW Form') that I don't use or need. Just clogs up the screen with unused info.

Linking a room from docusign to an opportunity in Command after the fact. Most listings have a listing fee which should be paid back to the listing agents and there is no easy way to add that when making a commission request

DocuSign

when forms have to be changed, the editing is difficult, or having to find a whole new form and make another envelope (that is Docusign...) Actually, the opportunities are pretty easy and compliance is all color coded so that is not that difficult either.

Can't do a copy from document and transfer to another opportunity. In dotloop was very easy and simple'



Research Takaways

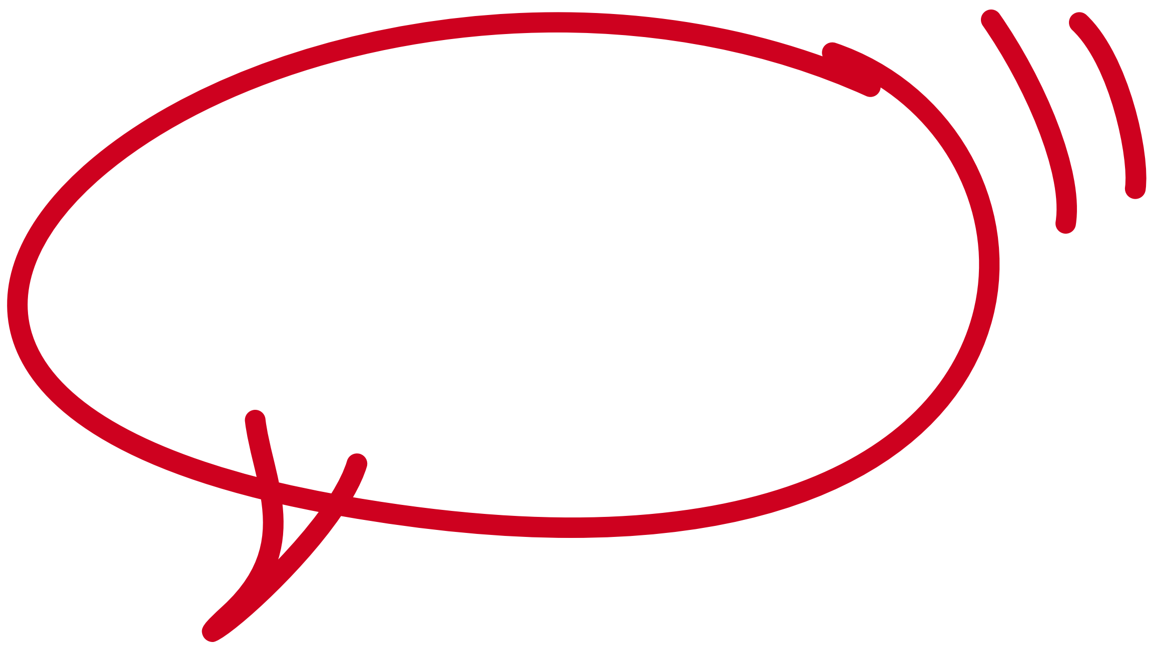
- While majority of the agents surveyed where experienced users, there were some pain points in creating opportunities / finding compliance checklists within Command.
- 'Too many steps' was a common theme in user feedback.
- Most written feedback was more so about the Command workflow vs. docusign usability for compliance.

Exploring Solutions

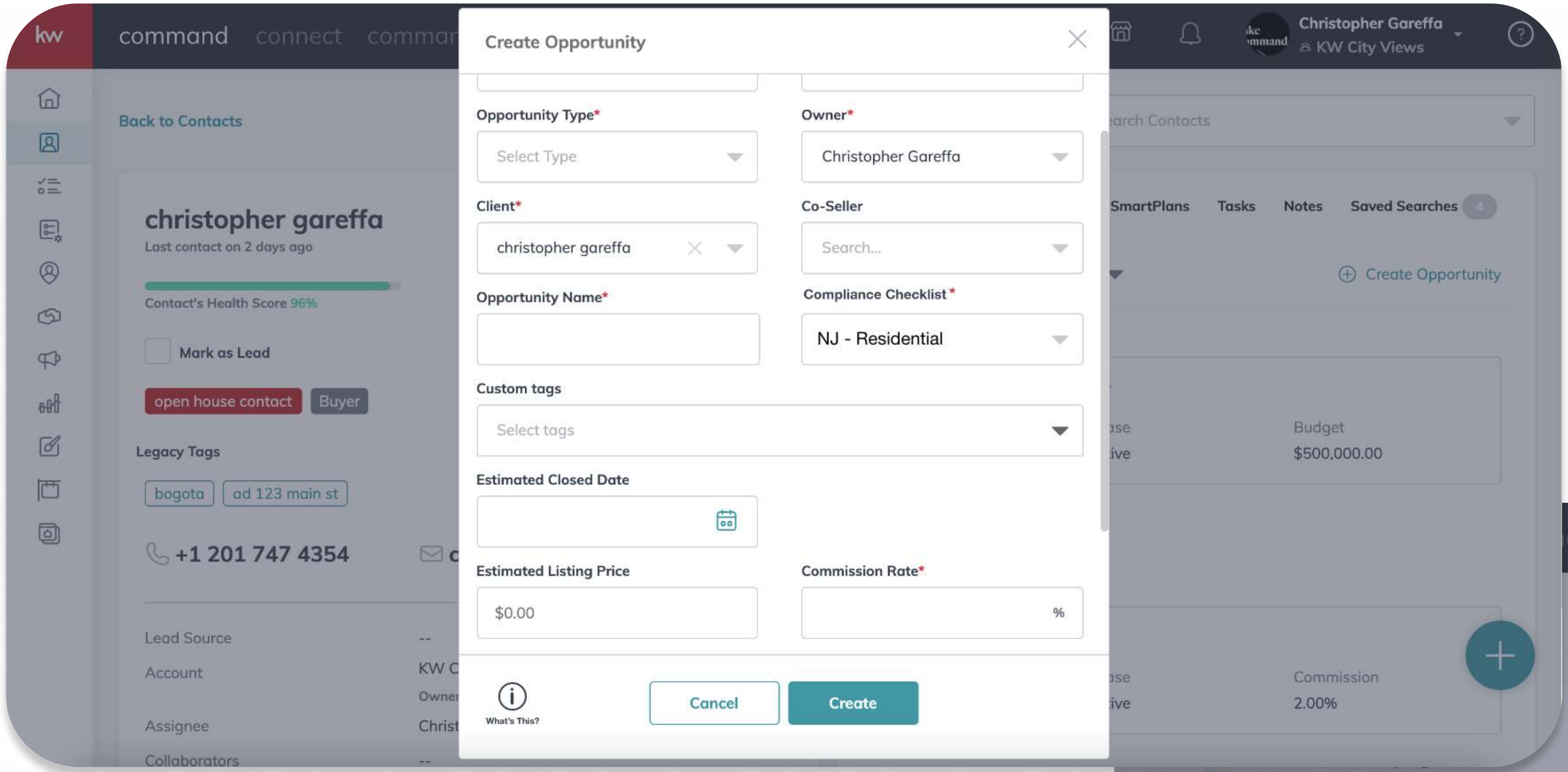
Exploring Solutions

I started to work out some ideas and priorities for each based around the feedback from agents provided in the survey. The main solutions are around the command workflow.

- **Tweaking the main user flow with some UI changes.** Don't fix what wasn't broken, but improve upon it? This was my approach as I went down the design process and wound up being the solution explored here.
- **Updates to user flow from DocuSign back to Command.** Another idea from feedback was improving the checklist to work better with rooms. IE: making the file names easier to see (extended dropdown menu width, sort by filters, etc).

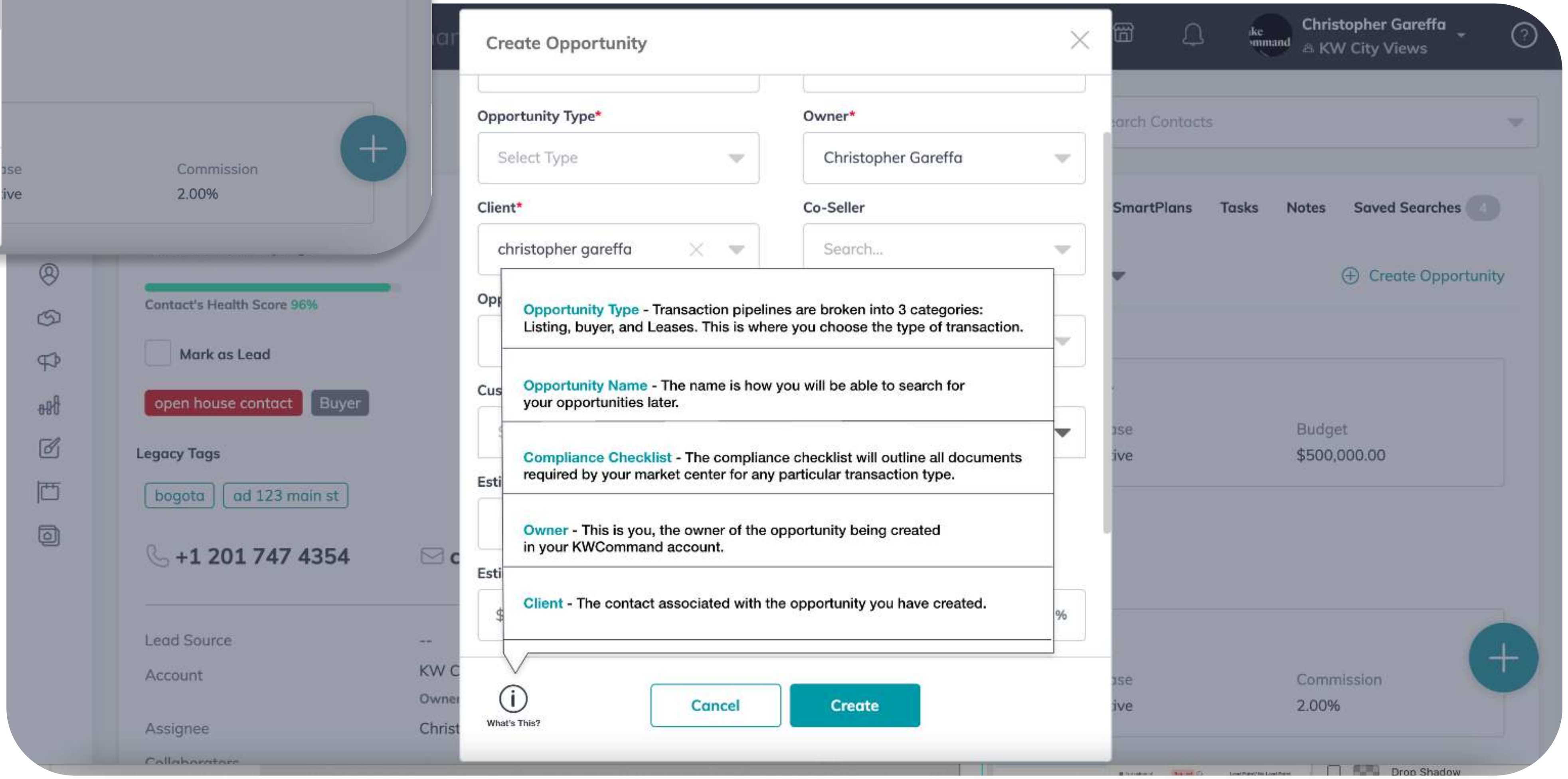


Mocking Up Changes

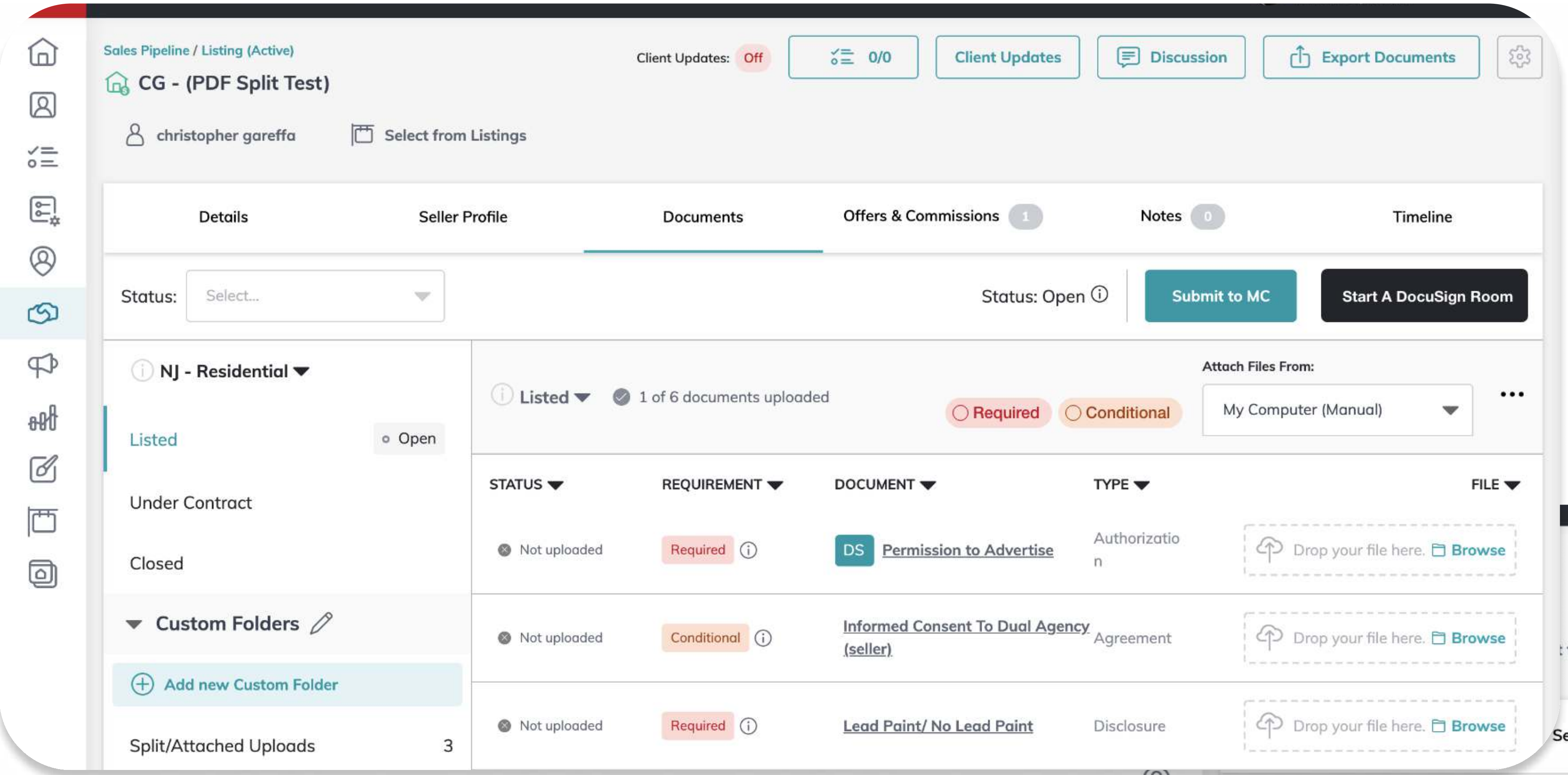


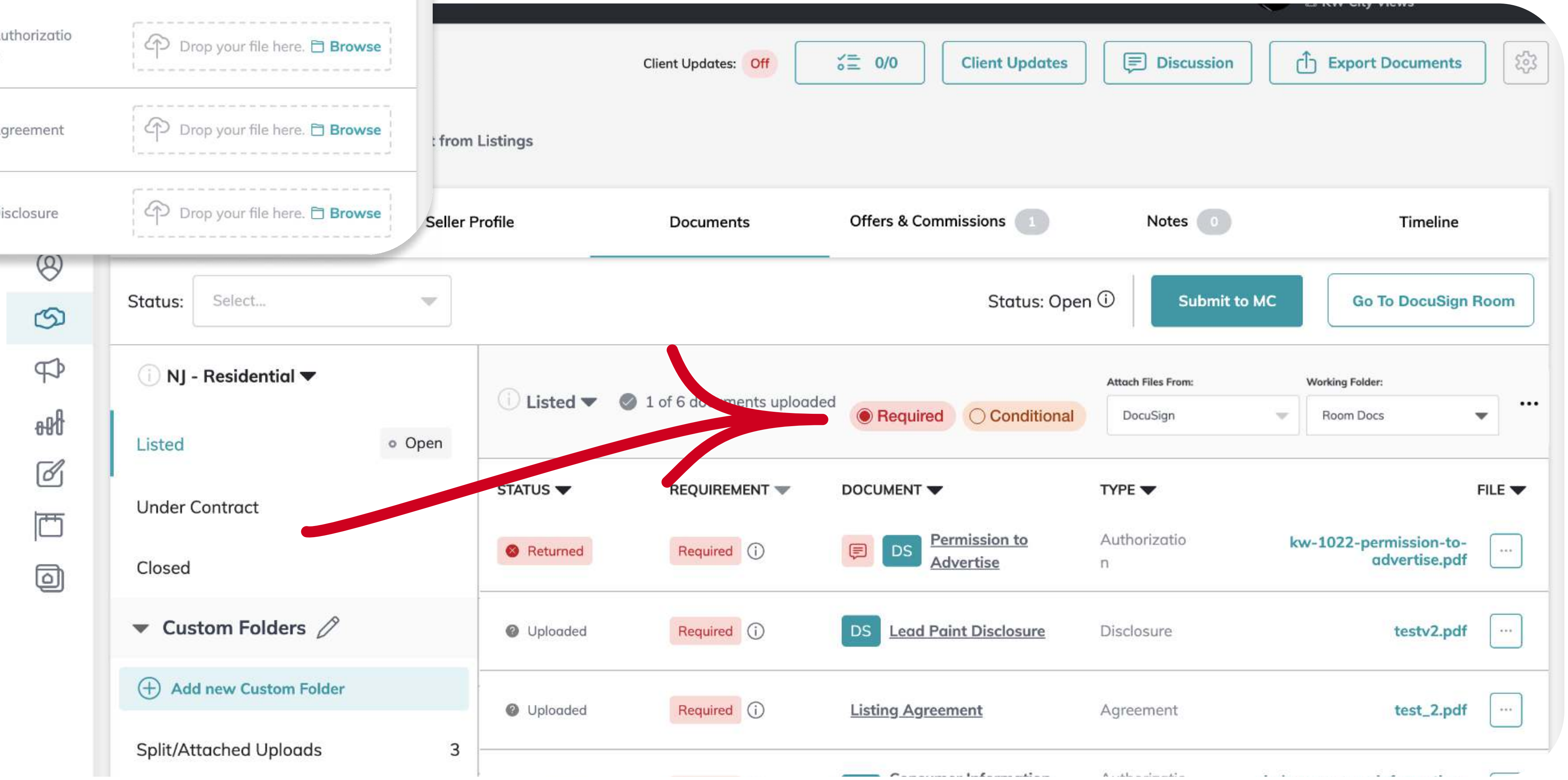
My first tweak here was to include a dropdown menu for the checklist right from the opportunity creation card screen.

I added an info tooltip to the main opportunity creation card to help agents understand key terms.



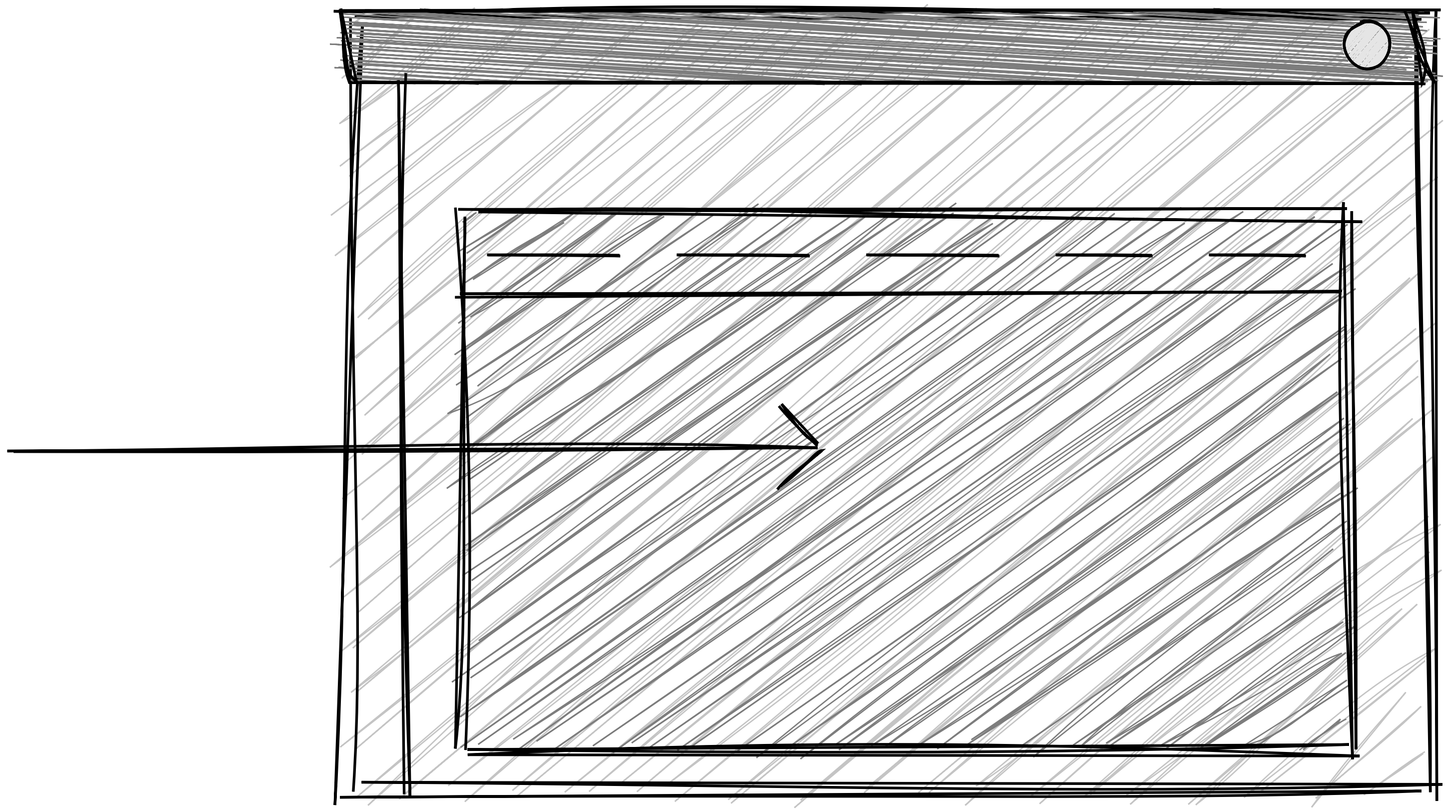
I changed the ‘Start A Transaction’ button to ‘Start A DocuSign Room’ to make it more apparent what it’s purpose is for.

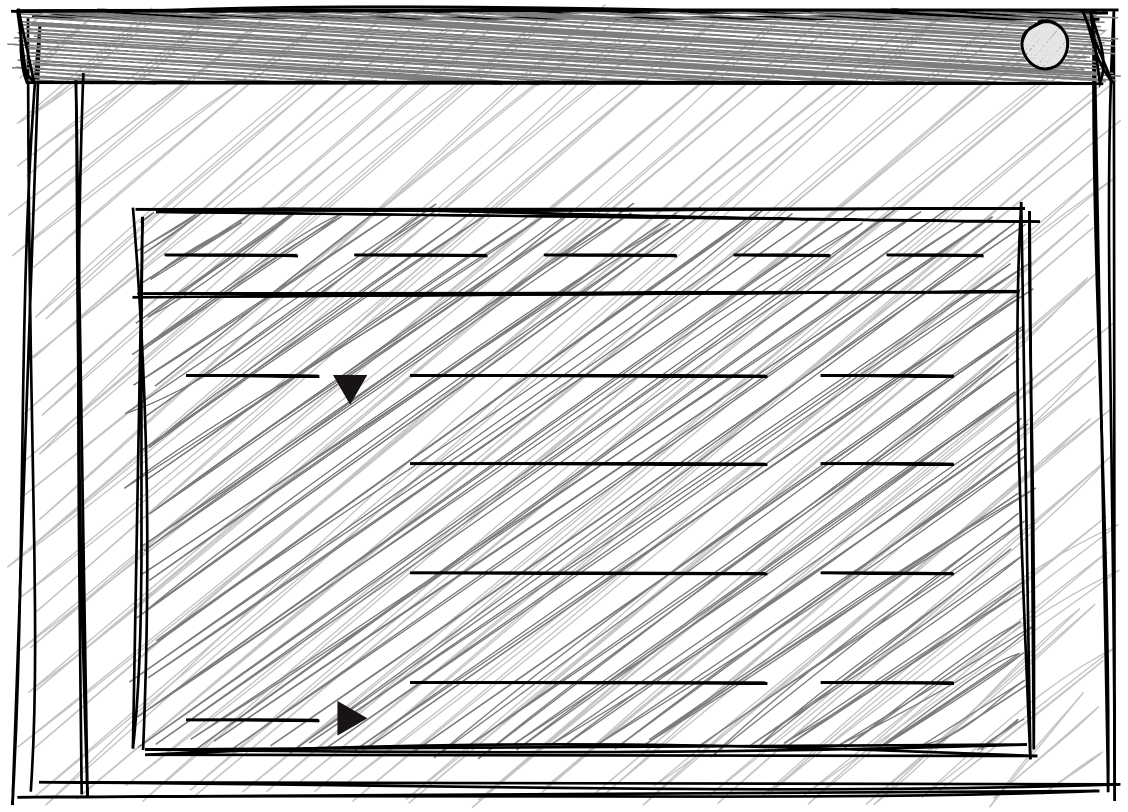




I added filters for required docs for easier filtering between required and optional forms. This type of feature was brought up on a lot of the feedback.

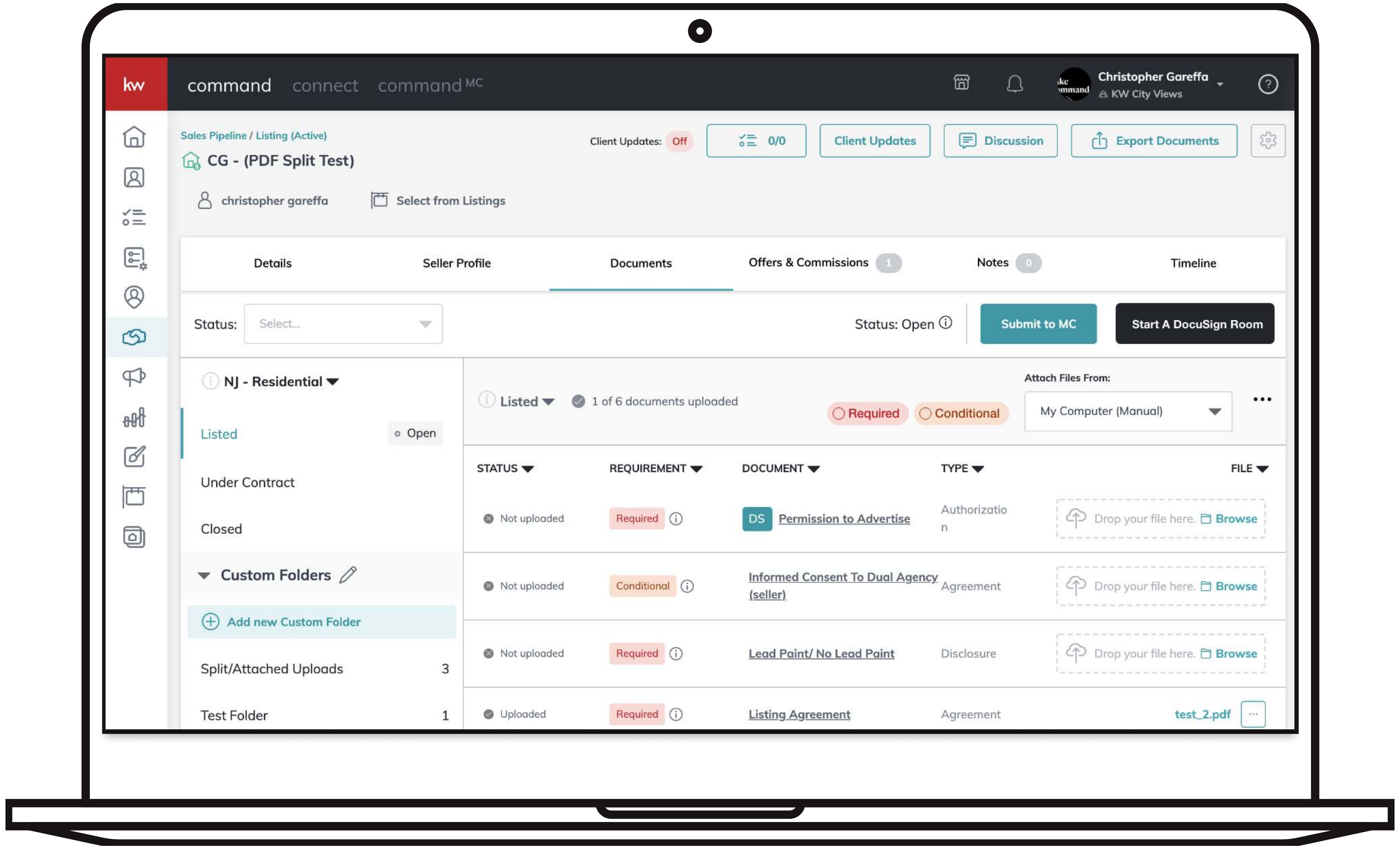
Wireframing For The Future





I am exploring additional changes to the workflow, which would include making the compliance checklists live under one collapsing menu vs. multiple screens as it currently stands.

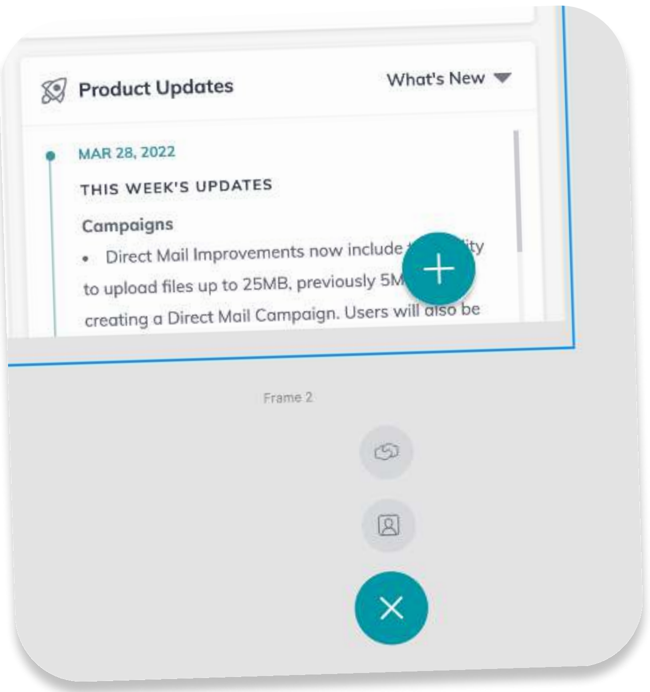
Prototype in Motion



Click to view interactive prototype

What's Next?

- Due to time constraints, I was not able to get to wireframing and building out certain updates to the UI. This included a shortcut button on the dashboard for creating contacts and opportunities.
- Explore alternate methods for the Command/ DocuSign workflow.
- Send out additional surveys or conduct in-person interviews to get more user feedback.



Thank You!