User Profiles

Distributor Champion

Publisher Champion

Internal User Advocate

Jill of All Trades
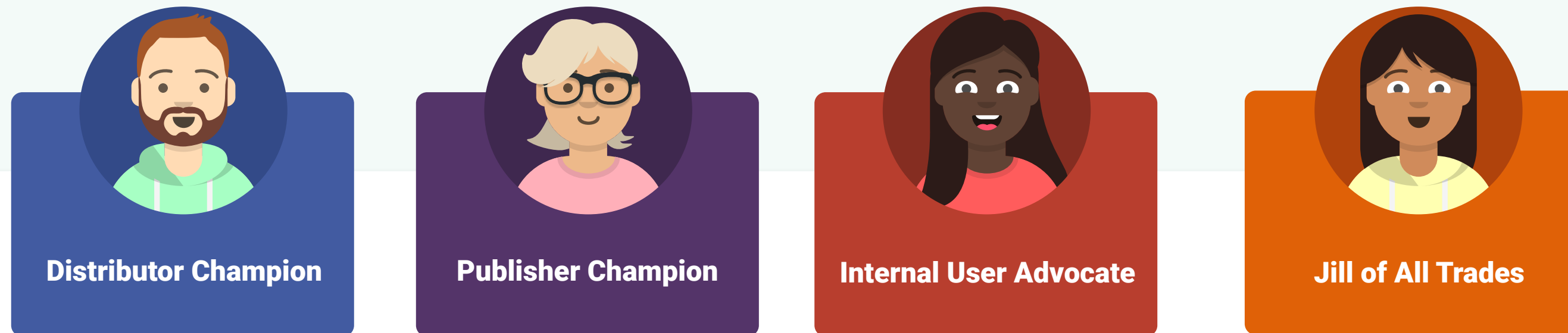
Four user personas were developed from the research and data collected during the user interviews and surveys. These personas represent the four main types of users, determined by their customers, and tasks they perform in Manage on a day-to-day basis.
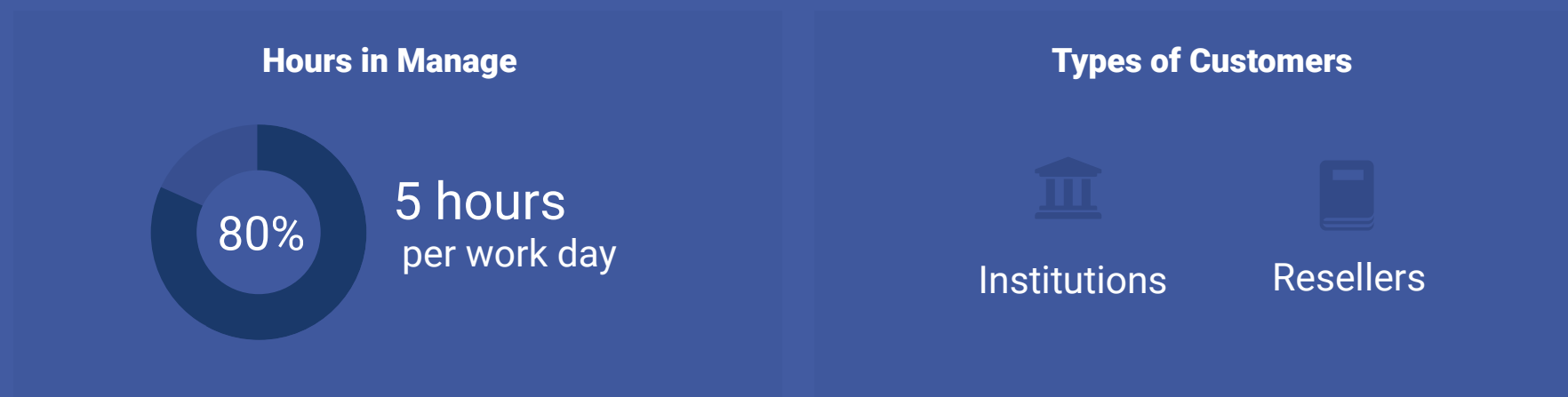
Distributor Champion

Job Title: Sr. Customer Success Manager

The Distribution Champion works every day with resellers or institutions. He has been working at VitalSource for over 3.5 years and spends most of his day using the Manage interface. He's concerned about the onboarding process after the new roll-out of updates for his customers.

Manage Insights

Hours in Manage

80%

5 hours per work day

Types of Customers

Institutions

Resellers

Common Actions in Manage

- [x] **Activity Log**
- [ ] Advanced Search
- [x] **Basic Search**
- [ ] Bulk Search
- [ ] Bulk Create
- [ ] Bulk Update
- [x] **Code Report**
- [ ] Create Bookshelf User

- [x] **Create System Users**
- [ ] Create Codes
- [ ] Create Company
- [ ] Create Imprint
- [x] **Custom Pricing**
- [x] **Demos and Rentals**
- [x] **Distribution Requests**
- [ ] Distribution Sets

- [x] **Engagement Dashboard**
- [x] **General Billing**
- [x] **Help Desk**
- [ ] Intermediate Search
- [x] **Maintenance Routines**
- [ ] Packages
- [ ] Playlists
- [x] **Reporter**

- [ ] Sales Rights Data
- [x] **Search Codes**
- [x] **Search Content**
- [x] **Search Bookshelf Users**
- [x] **Search System Users**
- [ ] View System Stats
- [x] **Other: Cancel Codes, Distribution Sets**

Less Common Actions: Activity log, Packages, Create Company, Cancel Codes, Distribution Sets

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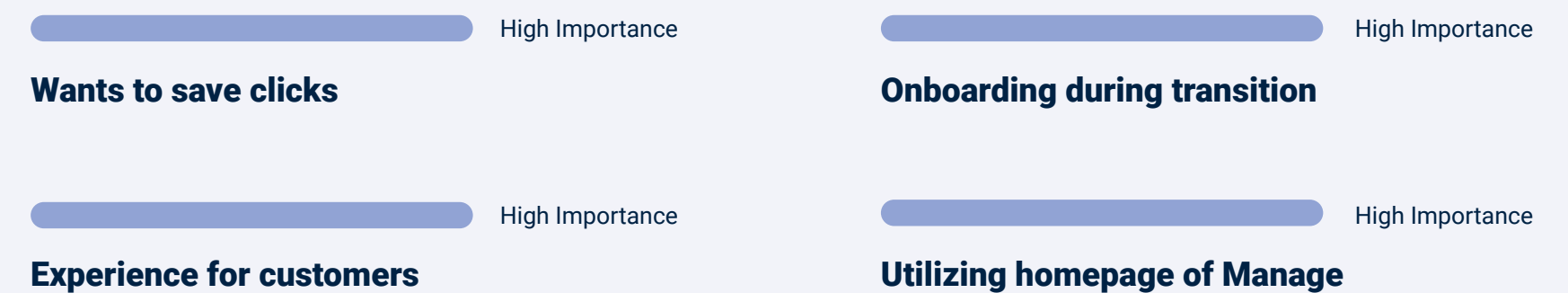# Distributor Champion Takeaways

Current Painpoints

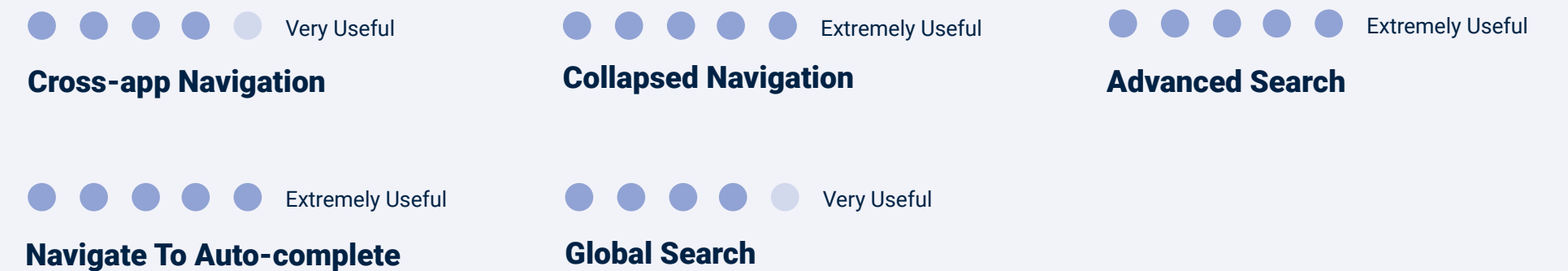*"Having to click five or six times to perform a function"*

"There's no one place to search for something"

"My clients still struggle with the UI after I've explained it multiple times"
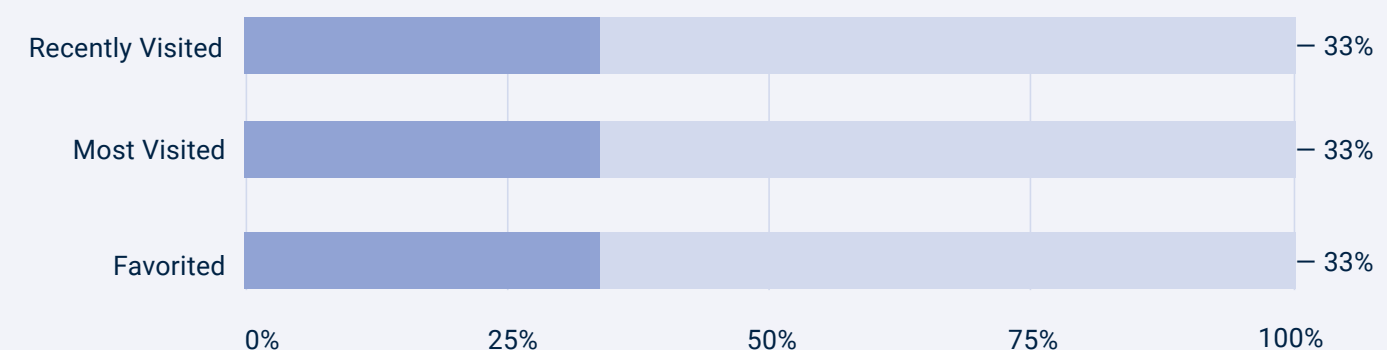
Experience Goals

High Importance
Wants to save clicks

High Importance
Onboarding during transition

High Importance
Experience for customers

High Importance
Utilizing homepage of Manage

Usefulness of Functionalities

Very Useful
Cross-app Navigation

Extremely Useful
Collapsed Navigation

Extremely Useful
Advanced Search

Extremely Useful
Navigate To Auto-complete

Very Useful
Global Search

Customization

Which preference option is the most useful?

|	
Recently Visited	— 33%
Most Visited	— 33%
Favorited	— 33%

0%   25%   50%   75%   100%

Publisher Champion

Job Title: Customer Success Manager

The Publisher Champion works every day with publishers who are also Manage users. She has been working at VitalSource for 2-3 years and spends most of her workday using the Manage interface. She wants the homepage to be more useful in a general theme of saving clicks while working.

Manage Insights
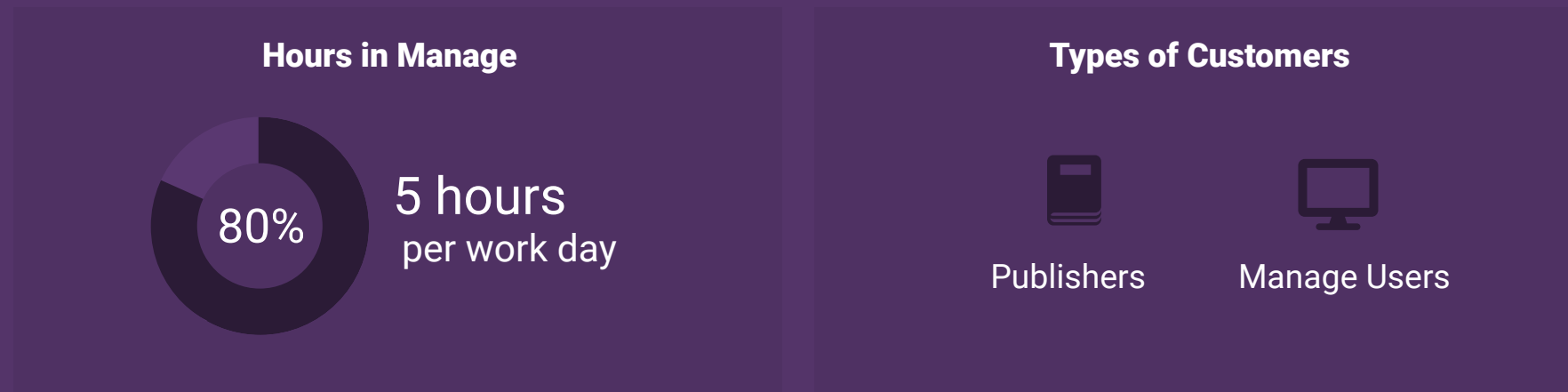
Hours in Manage

80%

5 hours per work day

Types of Customers

Publishers

Manage Users

Common Actions in Manage

- ☑ Activity Log
- ☑ Advanced Search
- ☑ Basic Search
- ☑ Bulk Search
- ☑ Bulk Create
- ☑ Bulk Update
- ☑ Code Report
- ☑ Create Bookshelf User

- ☑ Create System Users
- ☑ Create Codes
- ☐ Create Company
- ☑ Create Imprint
- ☑ Custom Pricing
- ☑ Demos and Rentals
- ☑ Distribution Requests
- ☐ Distribution Sets

- ☑ Engagement Dashboard
- ☑ General Billing
- ☐ Help Desk
- ☐ Intermediate Search
- ☐ Maintenance Routines
- ☑ Packages
- ☑ Playlists
- ☑ Reporter

- ☑ Sales Rights Data
- ☑ Search Codes
- ☑ Search Content
- ☑ Search Bookshelf Users
- ☑ Search System Users
- ☐ View System Stats
- ☑ Other: Intermediate Search

Less Common Actions: Intermediate Search, Maintenance Routines, Imprints, Machines, Term/Courses, Activity
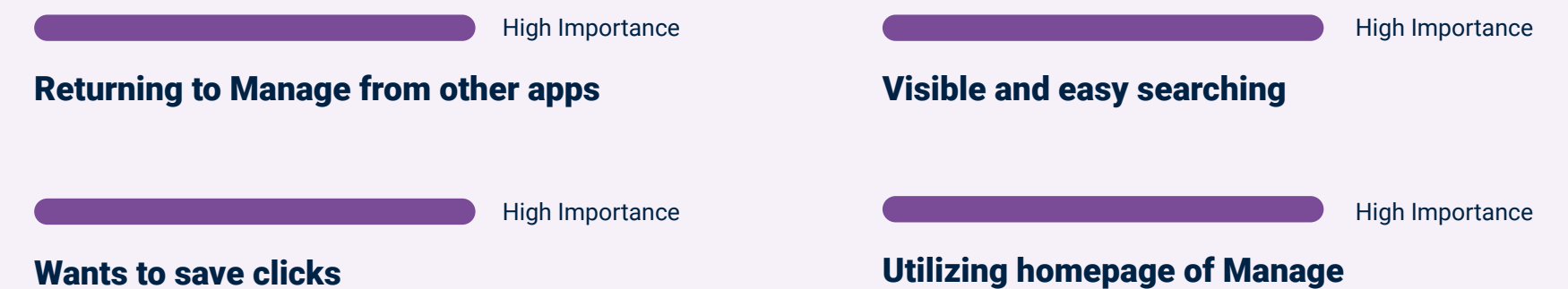
Publisher Champion Takeaways

Current Painpoints

"Everything is so siloed, I have to have tons of tabs open at once"

"I hate that I have to click extra times to do a search, it's pretty ridiculous"
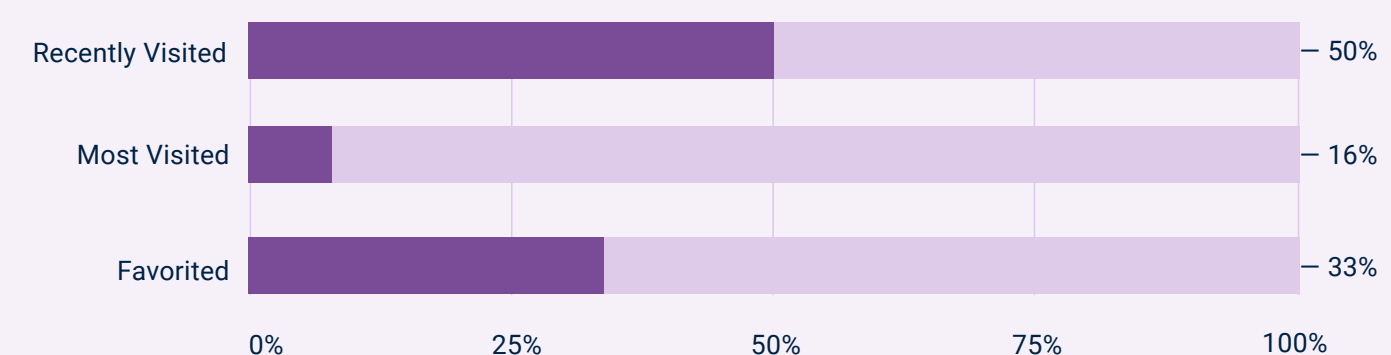
"I wish the homepage was more usable"

Experience Goals

High Importance
Returning to Manage from other apps

High Importance
Visible and easy searching

High Importance
Wants to save clicks

High Importance
Utilizing homepage of Manage

Usefulness of Functionalities

Very Useful
Cross-app Navigation

Very Useful
Global Search

Very Useful
Advanced Search

Very Useful
Navigate To Auto-complete

Extremely Useful
Collapsed Navigation

Customization

Which preference option is the most useful?

Recently Visited	— 50%
Most Visited	— 16%
Favorited	— 33%

0%   25%   50%   75%   100%

Internal User Advocate

Job Title: Customer Operations Analyst

The Internal Manage User Advocate works with Vitalsource Customer Success Teams as support for billing their customers. She has been working at VitalSource for over 3.5 years and spends all of their work day using Manage. She's very familiar with the Manage interface and has taught herself shortcuts to save time.

Manage Insights

Hours in Manage

100% — 8+ hours per work day

Types of Customers

Institutions | Distributors | Internal Manage Users

Common Actions in Manage

☑ **Activity Log**	☐ Create System Users	☐ Engagement Dashboard	☐ Sales Rights Data
☑ **Advanced Search**	☐ Create Codes	☑ **General Billing**	☑ **Search Codes**
☑ **Basic Search**	☐ Create Company	☐ Help Desk	☑ **Search Content**
☐ Bulk Search	☐ Create Imprint	☑ **Intermediate Search**	☑ **Search Bookshelf Users**
☐ Bulk Create	☐ Custom Pricing	☐ Maintenance Routines	☑ **Search System Users**
☐ Bulk Update	☐ Demos and Rentals	☑ **Packages**	☐ View System Stats
☑ **Code Report**	☐ Distribution Requests	☑ **Playlists**	☑ **Other: Custom Price Distributor Report**
☐ Create Bookshelf User	☐ Distribution Sets	☑ **Reporter**	

Less Common Actions: Intermediate Search, Advanced Search

Internal User Advocate

Current Painpoints

"I love the new quick links on the homepage, but wish they came with me"

"We need release notes somewhere, our customers need release notes too"

"I wish we could see associated parent/child companies with codes"
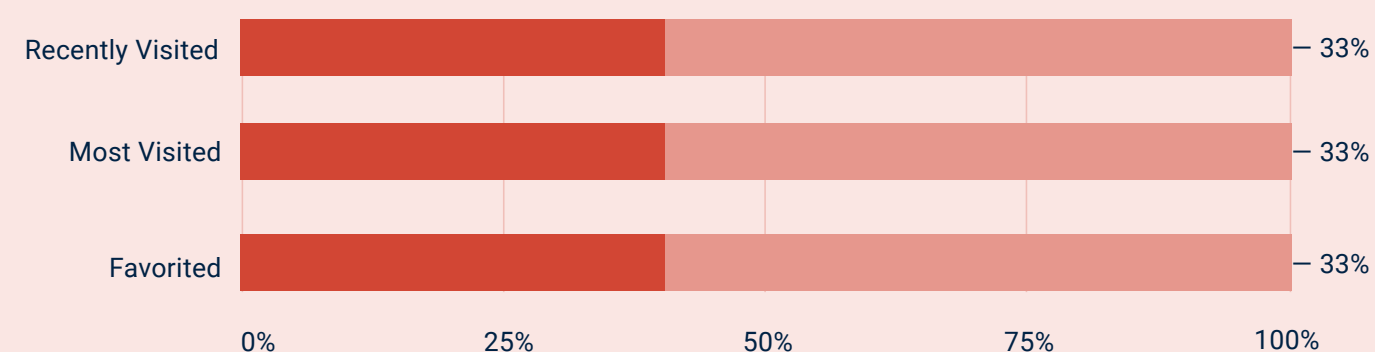
Experience Goals

Release notes — High Importance

Having room for error in search — High Importance

Wants to save clicks — High Importance

Utilizing homepage of Manage — Mid Importance

Usefulness of Functionalities

Cross-app Navigation — Extremely Useful

Global Search — Extremely Useful

Advanced Search — Extremely Useful

Navigate To Auto-complete — Extremely Useful

Collapsed Navigation — Extremely Useful

Customization

Which preference option is the most useful?

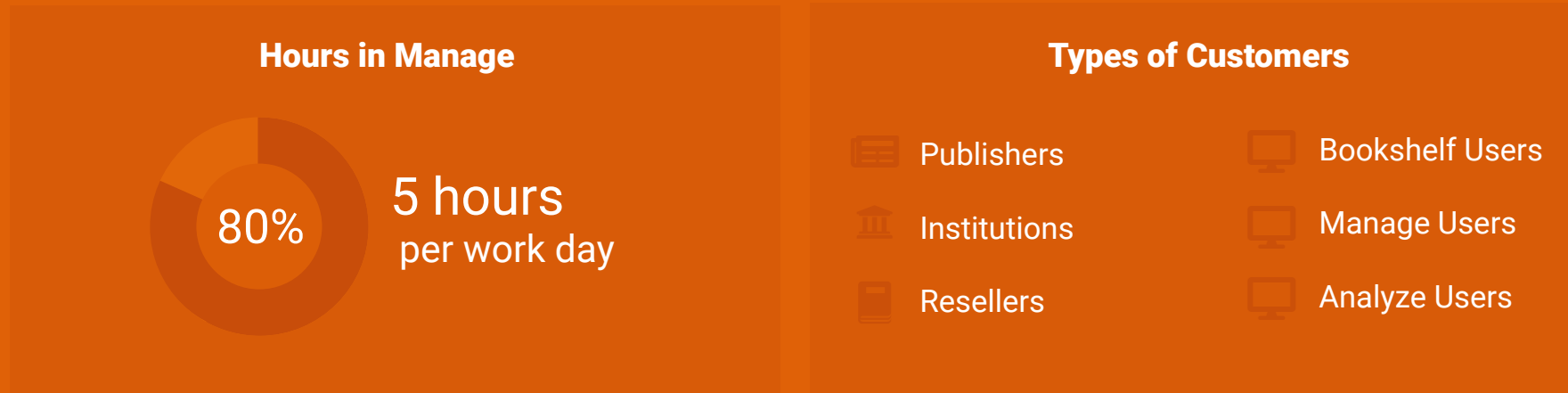|	
Recently Visited	33%
Most Visited	33%
Favorited	33%

0% 25% 50% 75% 100%

Jill of All Trades

Job Title: Customer Success Manager / Business System Analyst

The Jill of All Trades works every day with many different types of clients: publishers, institutions, resellers, bookshelf users, manage users and analyze users. She has been working at VitalSource for about 4 years and spends around half of her day using the Manage interface. She wears many hats and performs a lot of different tasks.

Manage Insights

Hours in Manage

80%

5 hours per work day

Types of Customers

- Publishers
- Institutions
- Resellers
- Bookshelf Users
- Manage Users
- Analyze Users

Common Actions in Manage

- ☑ Activity Log
- ☑ Advanced Search
- ☑ Basic Search
- ☑ Bulk Search
- ☑ Bulk Create
- ☑ Bulk Update
- ☑ Code Report
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- ☑ Playlists
- ☑ Reporter

- ☑ Sales Rights Data
- ☑ Search Codes
- ☑ Search Content
- ☑ Search Bookshelf Users
- ☑ Search System Users
- ☐ View System Stats
- ☑ **Other: Custom Pricing Reports, Activity Log**

Less Common Actions: Wholesale Matrix, Libraries, Machines, Publisher Reports
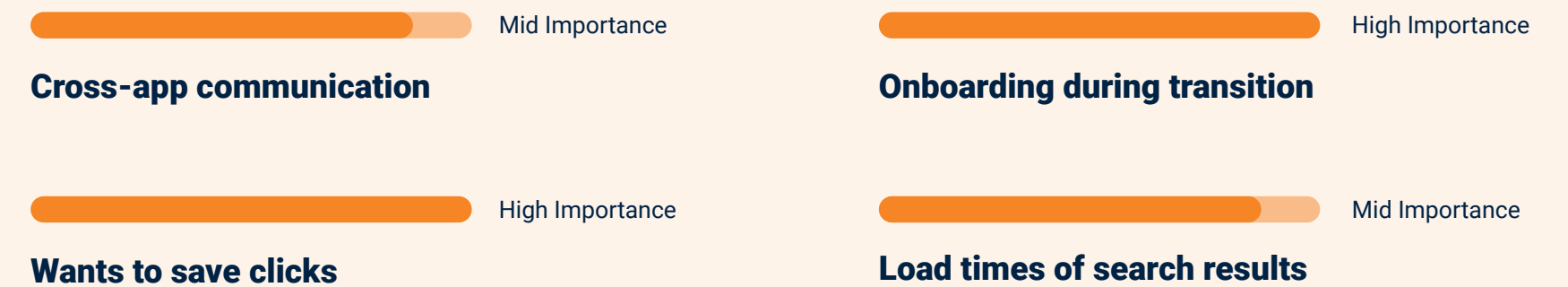
Jill of All Trades Takeaways

Current Painpoints
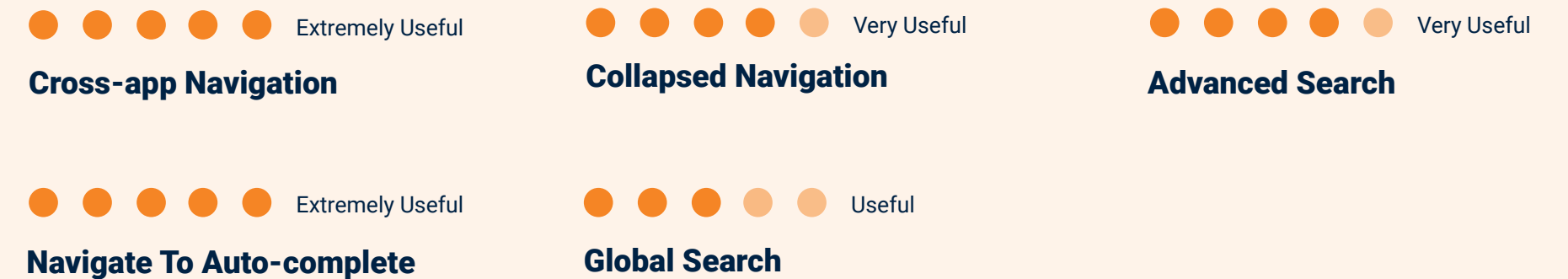
"A lot of people don't know where things are in Manage"

"I don't want to wait 3 hours for search results"

"Most days I have 20 windows of Manage open with search results"
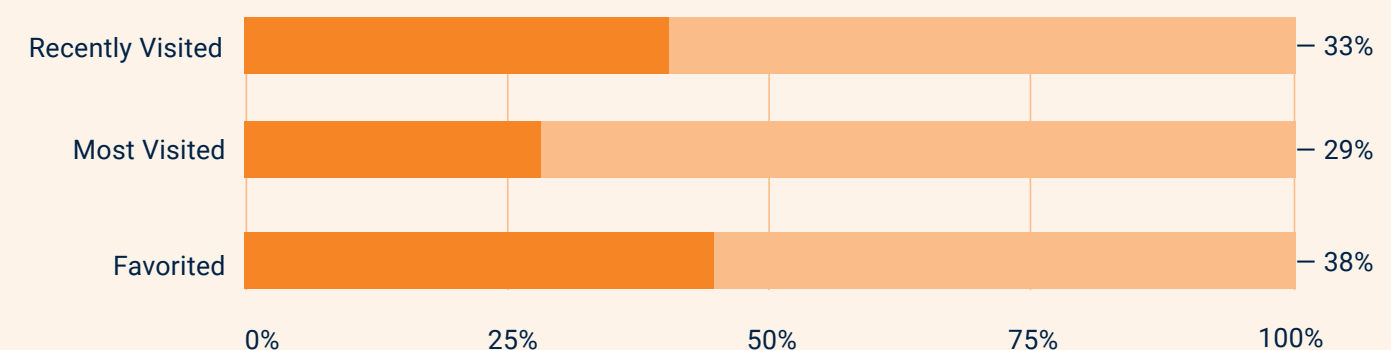
Experience Goals

Cross-app communication — Mid Importance

Onboarding during transition — High Importance

Wants to save clicks — High Importance

Load times of search results — Mid Importance

Usefulness of Functionalities

Cross-app Navigation — Extremely Useful

Collapsed Navigation — Very Useful

Advanced Search — Very Useful

Navigate To Auto-complete — Extremely Useful

Global Search — Useful

Customization

Which preference option is the most useful?

- Recently Visited — 33%
- Most Visited — 29%
- Favorited — 38%

0%   25%   50%   75%   100%

Usage Overview

Hours in Manage

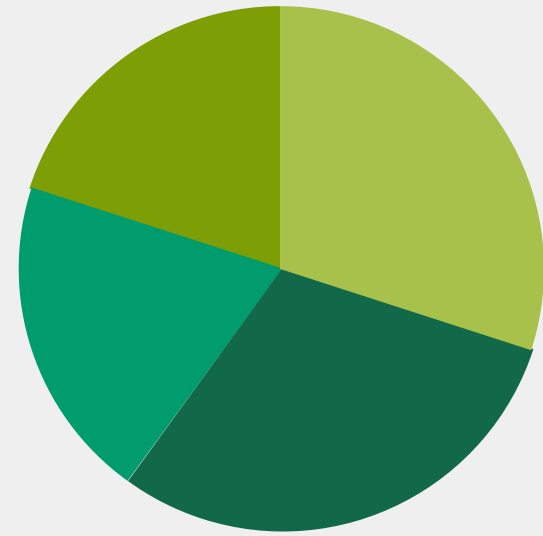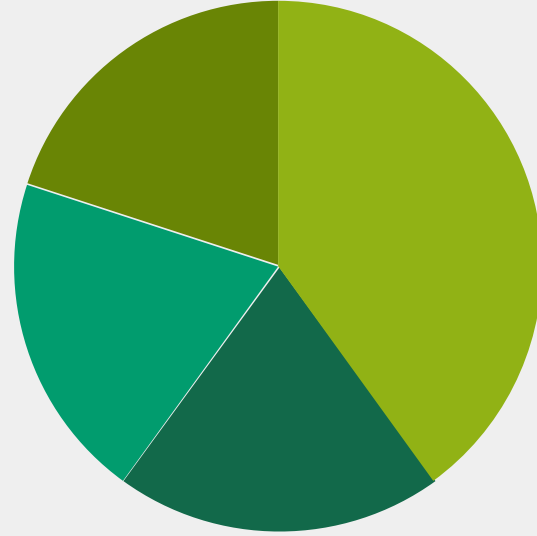|			
5 hours daily	5 hours daily	8+ hours daily	5 hours daily
Distributor Champion	Publisher Champion	Internal User Advocate	Jill of All Trades

Years using Manage

- 0-1 years
- 2-3 years
- 4-5 years
- 5+ years

Hours per day using Manage

- 0-2 hours
- 3-5 hours
- 6-7 hours
- 8+ hours

Customers

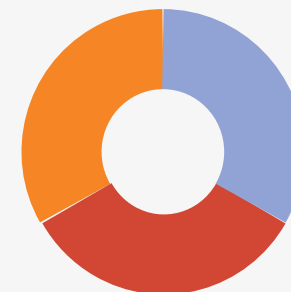|	
Publishers	60%
Institutions	50%
Resellers	40%
Bookshelf Users	30%
Manage Users	50%
Analyze Users	30%
Internal Manage Users	10%
Billing	10%
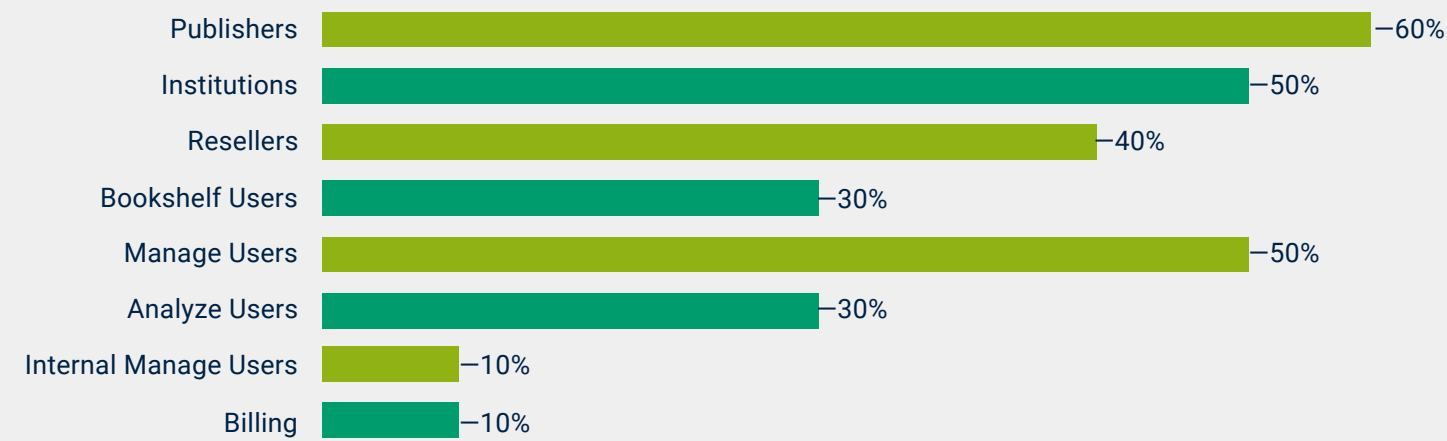
Experience Goals

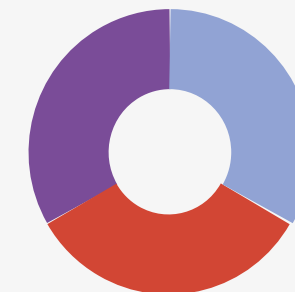## High Importance

Onboarding for users

Saving clicks

Cross-app communication

Load times on search results

Utilizing homepage

A forgiving search

Customization Preferences

Recently Visited	33%	50%	33%	33%
Most Visited	33%	16%	33%	29%
Favorited	33%	33%	33%	38%