Dialpad × Design

FEATURES FOR MODERN BUSINESS COMMUNICATIONS

Voice, Video, Messaging + Contacts and Company Directory + Integrations + Detailed Call History

AT YOUR DESK

AROUND THE WORKPLACE

ON THE GO

SERVICE STRUCTURED AROUND CUSTOMIZABILITY

Team Member and Company Settings + Help Center

01 ABOUT DIALPAD

What is Dialpad?

With Dialpad, companies are easily able to roll out deployments of business phone systems to their employees. Workers can then connect with their colleagues and clients on all their devices, no matter where they go, all with the help of company directories and integrations with popular business services.

"Connect Everyone, Work Everywhere."

SMALL BUSINESS OWNER

"We're usually on the go at the Flower Shop so all employees depend on their mobile devices to speak with clients and each other."

1-10 Employees

IT PROFESSIONAL

"Changing from a PBX system takes time, so I look for a phone system that can scale at low cost with valuable features for large companies."

100+ Employees

CHIEF TECHNICAL OFFICER

"I can make a real impact at my organization by quickly deploying shared technology at our growing international offices. "

Multinational

MODERN WORKER

"I'm either in the office or in a taxi or on a flight across the world— but when my important clients need me, I am there to answer their call."
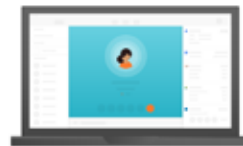
50+ Employees

ASSISTANT & RECEPTIONIST

"Calls are meant either for me or my boss. I need to know who is being reached so I can be in the right midnset when I pick up."
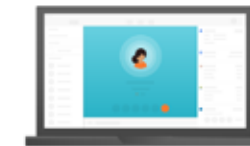
100+ Employees

DEPARTMENT OPERATOR

"We handle a very high call volume at the 24/7 Support Department, and my job involves answering and following up on these calls."

1000+ Employees

02 ABOUT DIALPAD

Who uses Dialpad?

User studies uncovered 6 key user groups.

Three make decisions regarding purchasing phone systems, and the other three are phone users with specific needs.

From VSB (Very Small Business) to Enterprise customers, Dialpad aims to satisfy the needs of all types of businesses.
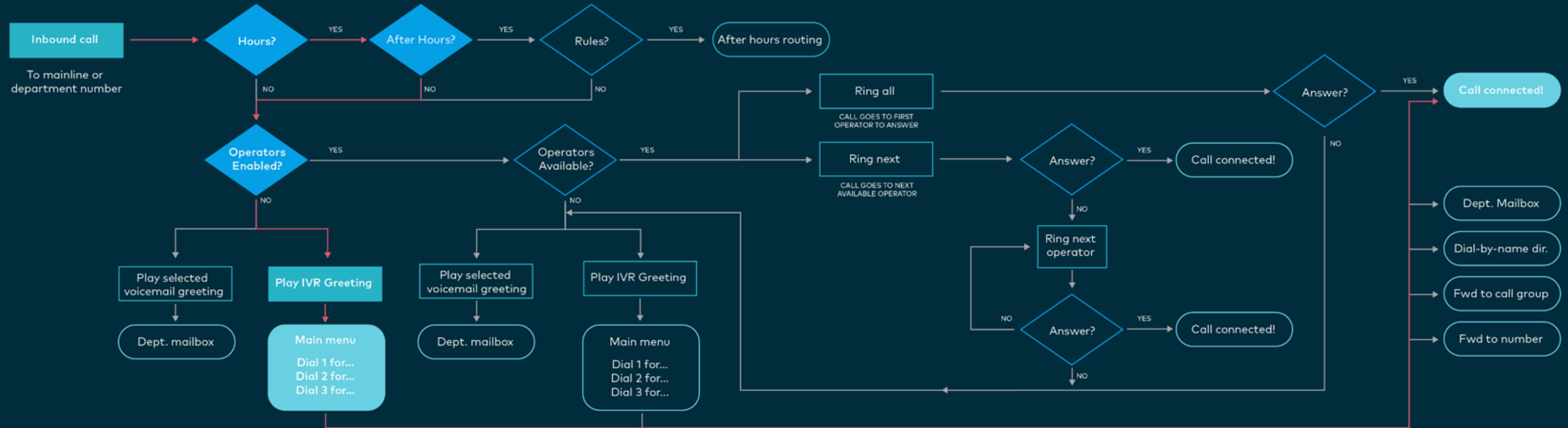
CALLERS ONLY HEAR THIS:

Ring! Ring! Ring!

"You've reached Peak Chocolates! **Press 1** for a list of store locations. **Press 0** to speak with an agent."

Dial 0

Operator: "Hello this is Joe at Peak Chocolates speaking, how may I help you today?"

BUT WE HELP BUSINESSES CONFIGURE ALL THIS:

Inbound call — To mainline or department number

Hours? — YES → After Hours? — YES → Rules? — YES → After hours routing

Hours? — NO

After Hours? — NO

Rules? — NO

Operators Enabled? — YES → Operators Available? — YES → Ring all (CALL GOES TO FIRST OPERATOR TO ANSWER) → Answer? — YES → Call connected!

Ring next (CALL GOES TO NEXT AVAILABLE OPERATOR) → Answer? — YES → Call connected!

Answer? — NO → Ring next operator → Answer? — YES → Call connected!

Answer? — NO

Operators Enabled? — NO → Play selected voicemail greeting → Dept. mailbox

Play IVR Greeting → Main menu: Dial 1 for... Dial 2 for... Dial 3 for...

Operators Available? — NO → Play selected voicemail greeting → Dept. mailbox

Play IVR Greeting → Main menu: Dial 1 for... Dial 2 for... Dial 3 for...

Answer? — NO → Dept. Mailbox / Dial-by-name dir. / Fwd to call group / Fwd to number
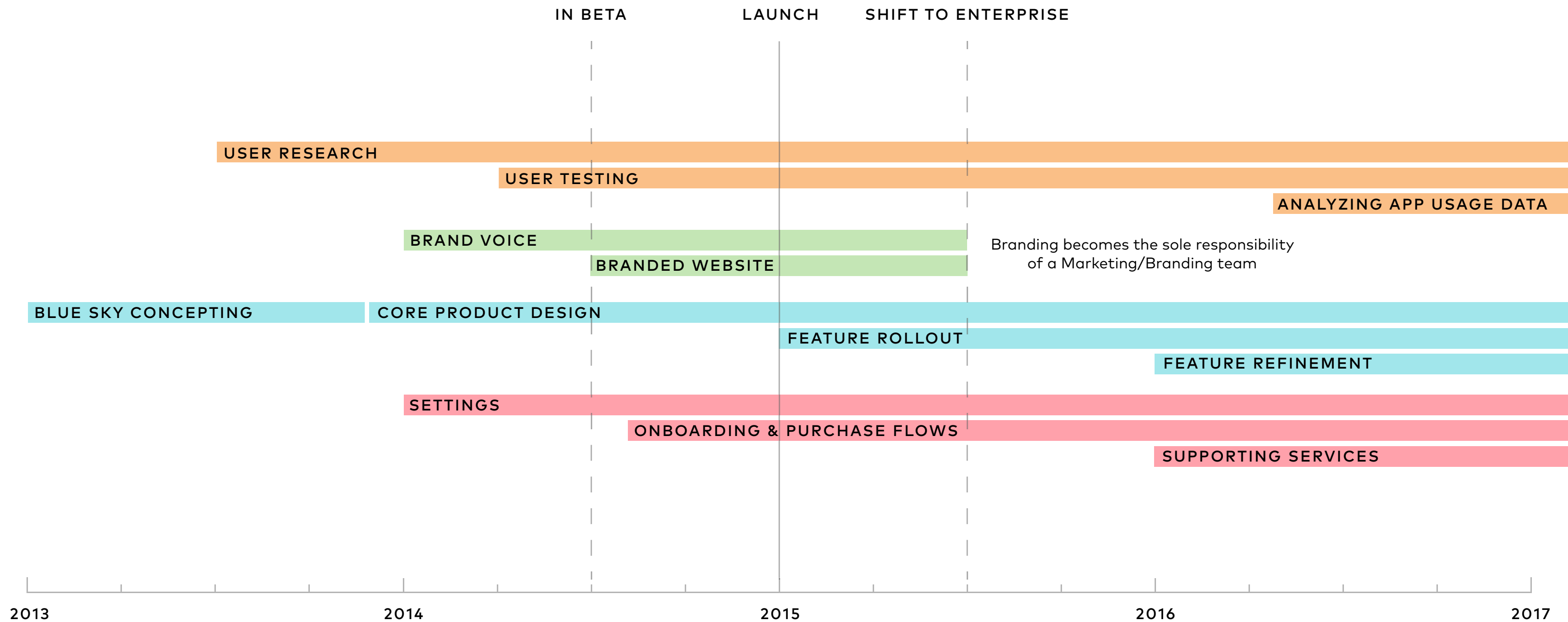
03 ABOUT DIALPAD

We Make Call Routing Easy

A core aspect of Dialpad's service is the extensive customizability given to company admins. Product designers must then package it all in a user friendly UI.

Dialpad allows admins to set up groups (such as Departments, Call Centers, and Executive-Assistant pairings) which can direct calls to one number and forward them to a list of operators.

IN BETA | LAUNCH | SHIFT TO ENTERPRISE

USER RESEARCH

USER TESTING

ANALYZING APP USAGE DATA

BRAND VOICE

BRANDED WEBSITE

Branding becomes the sole responsibility of a Marketing/Branding team

BLUE SKY CONCEPTING

CORE PRODUCT DESIGN

FEATURE ROLLOUT

FEATURE REFINEMENT

SETTINGS

ONBOARDING & PURCHASE FLOWS

SUPPORTING SERVICES

2013 | 2014 | 2015 | 2016 | 2017

How Product Design Roles Evolved

Dialpad is currently in its fourth year since initial concept work first began. During this time, the role of product designers has evolved to meet the changing goals of the organization.

The list of responsibilities is incremental, but with more features and feature revisions also come more effective methods of user research.

SEARCH, CALL, MESSAGE

CALL HISTORY

CONTACT DIRECTORY
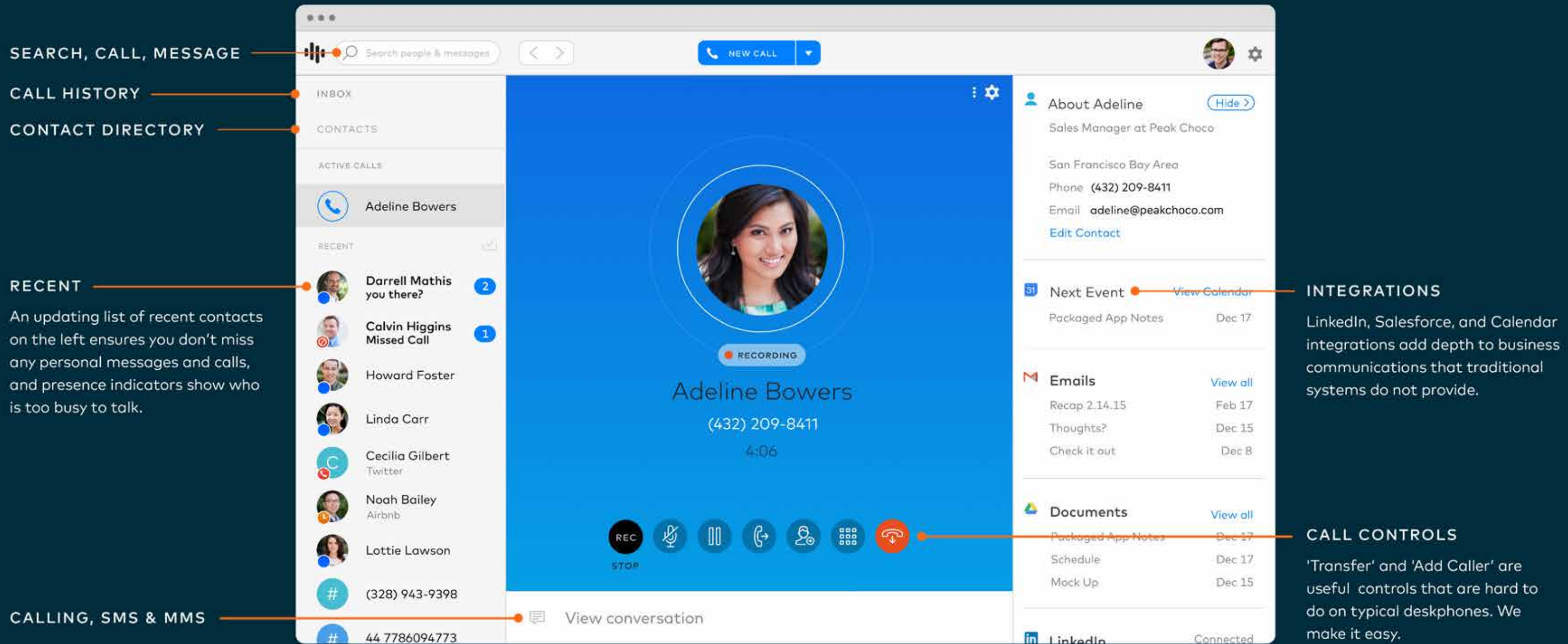
RECENT

An updating list of recent contacts on the left ensures you don't miss any personal messages and calls, and presence indicators show who is too busy to talk.

CALLING, SMS & MMS

INTEGRATIONS

LinkedIn, Salesforce, and Calendar integrations add depth to business communications that traditional systems do not provide.

CALL CONTROLS

'Transfer' and 'Add Caller' are useful controls that are hard to do on typical deskphones. We make it easy.
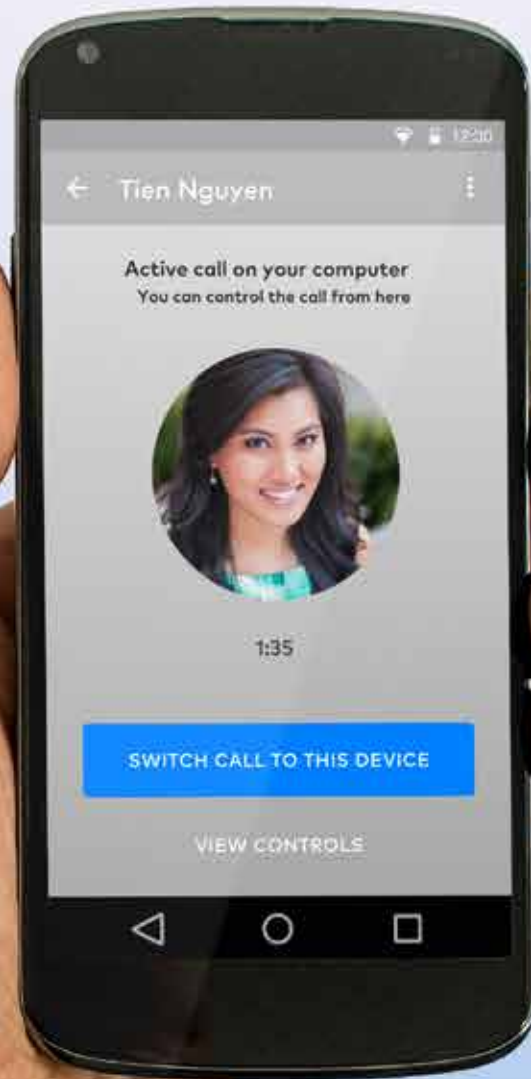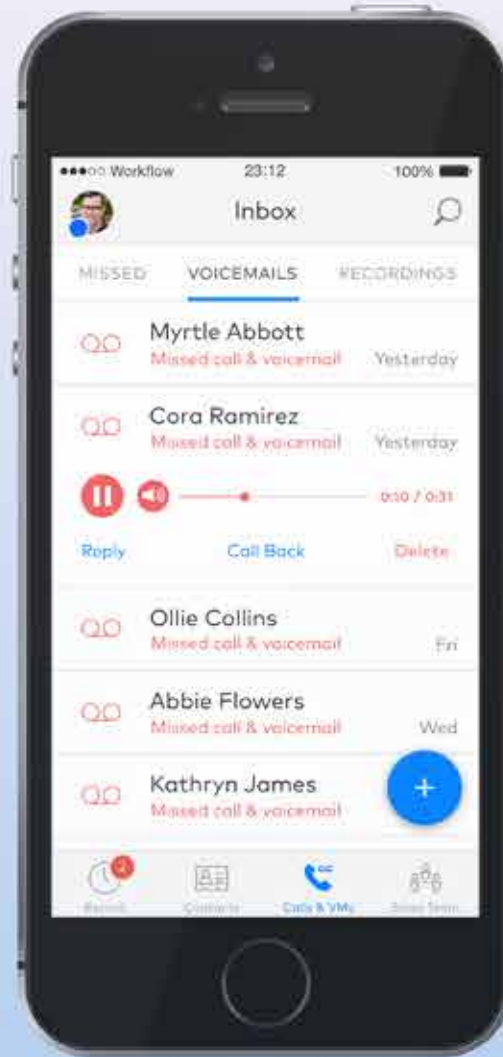
05 APP DESIGN

Desktop for Mac and Windows

Dialpad enables business people to make and receive calls from any device. The desktop app is central to the experience, allowing people to make and receive calls text messages from their work computer.

Many aspects of the service, such as Department and Call Center capabilities, are optimized for the desktop app.
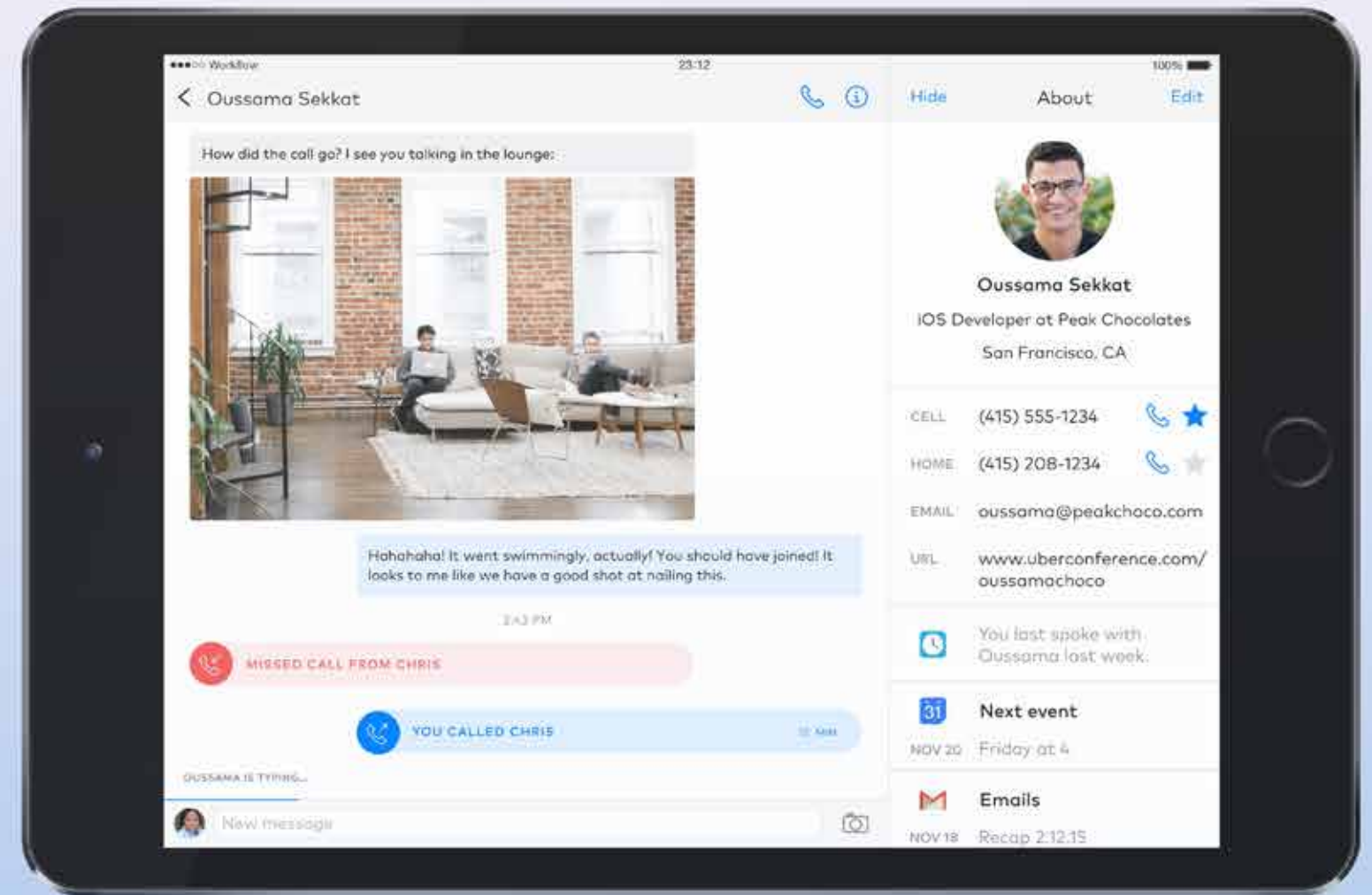
06 APP DESIGN

Mobile Phone and Tablet

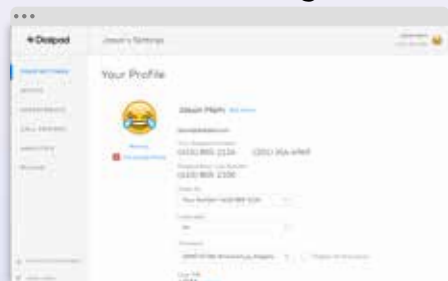The mobile apps allow people to take their phone calls with them.

Even if a phone call was started on a different device, users can simply tap

a 'Take This Call' button on any app to magically switch the call to the new device, with all the same features included on the desktop app.

Your Settings

Manage Team
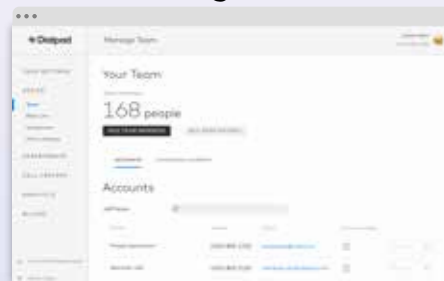
Main Line Settings
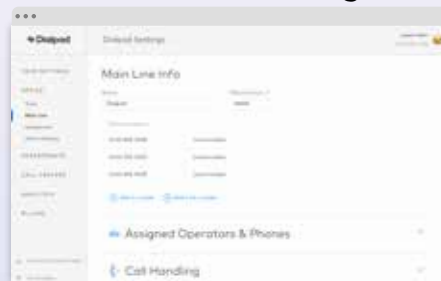
Manage Phones

Office Settings
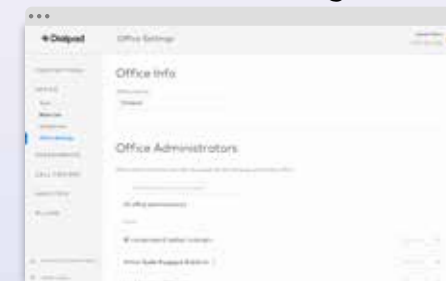
Company Website
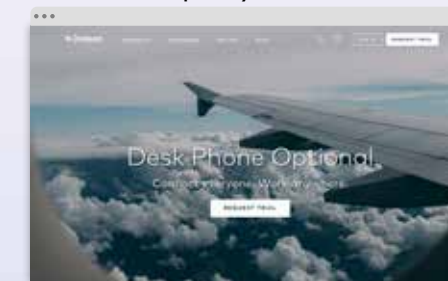
Company Settings
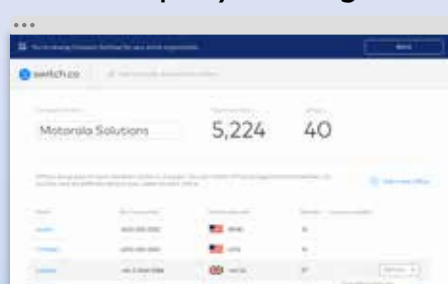
Department Settings
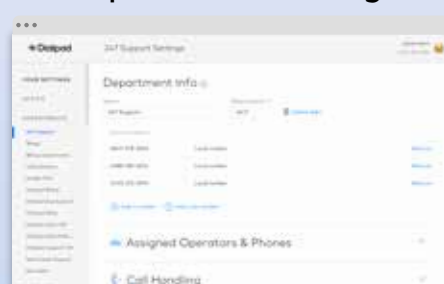
Call Center Settings
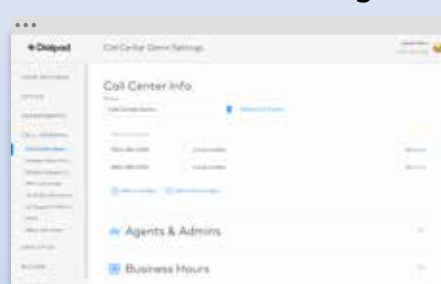
Analytics
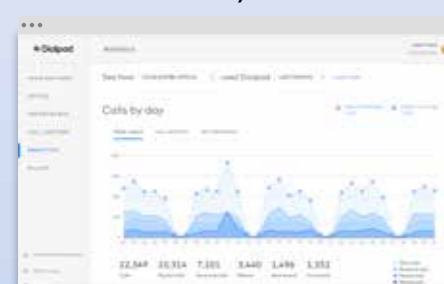
Billing

Blog

Call Credits
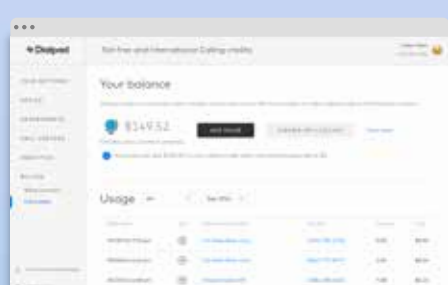
Signup

Help Center

Status Page
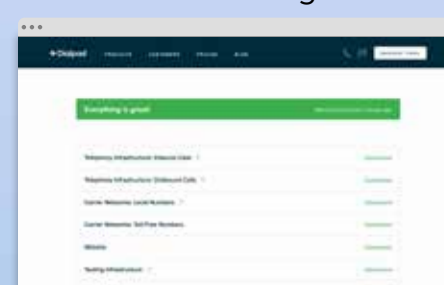
Deskphone Purchase Flow

07 SUPPORTING SERVICES

Web Resources and Settings

The power of Dialpad lies under the hood— so it's no surprise that Settings Design is a key component of UX work.

Companies should be able to route their calls in any way they would like, purchase and configure phones for their employees, manage multiple offices at a large organization, view detailed analytics for all employees, and more.
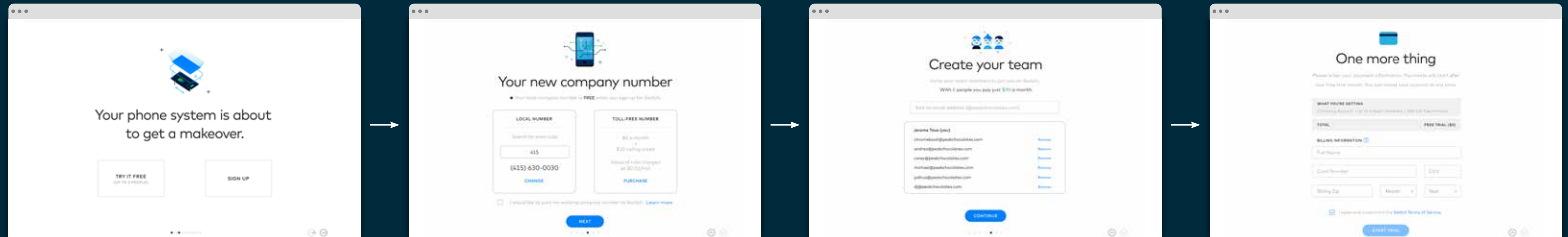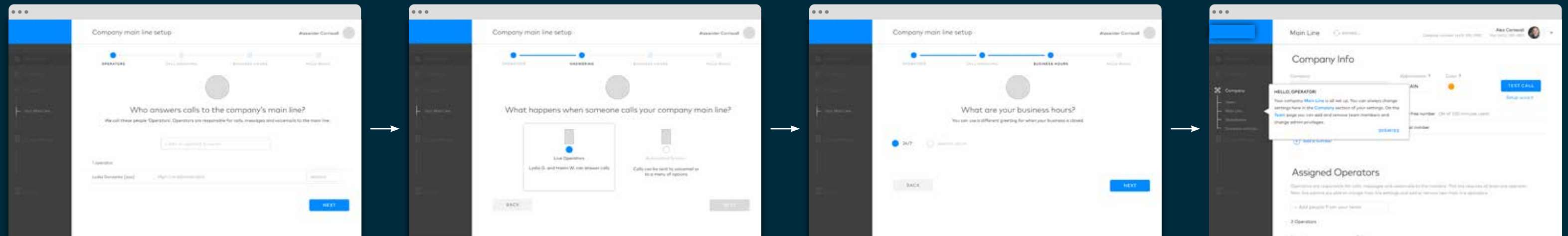
08 SUPPORTING SERVICES

Signup and Onboarding

Dialpad aims to stand out from its competitors by making setup easy.

Signup was designed to have fewer steps than the rest of the competition, and design can further aid company admins and other users through wizards, bots, and prioritizing the right content. As designers, it is our job to advocate for users and make improvements when possible.

PROBLEM:

The original design did not scale to match an growing enterprise feature set, so we did more user interviews and product research
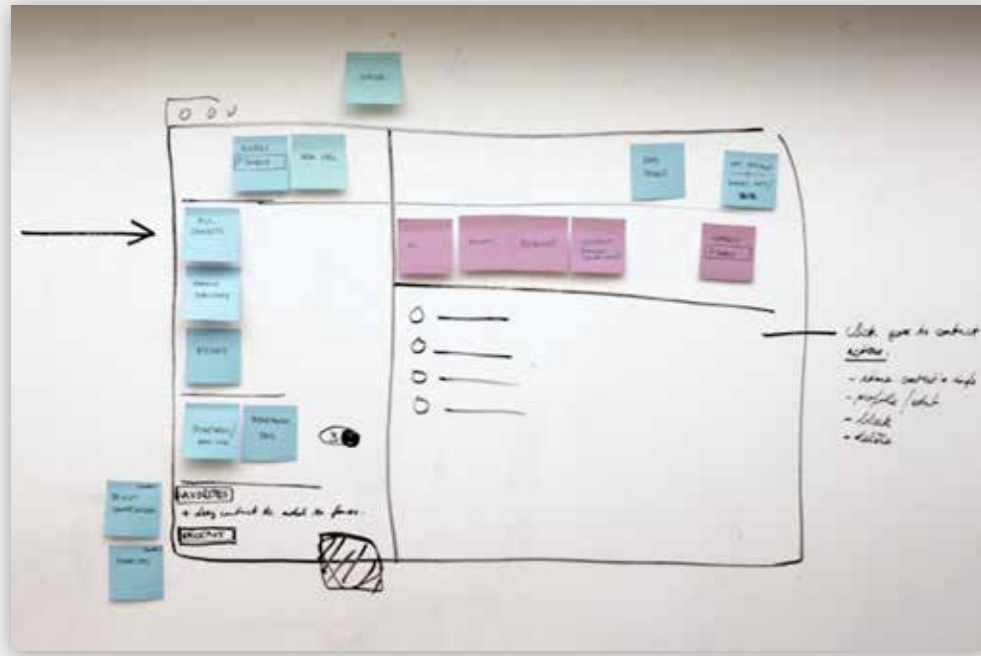
SKETCH:

After mapping out requested features onto a whiteboard, we moved from the existing multi-window framework to a wider inbox style
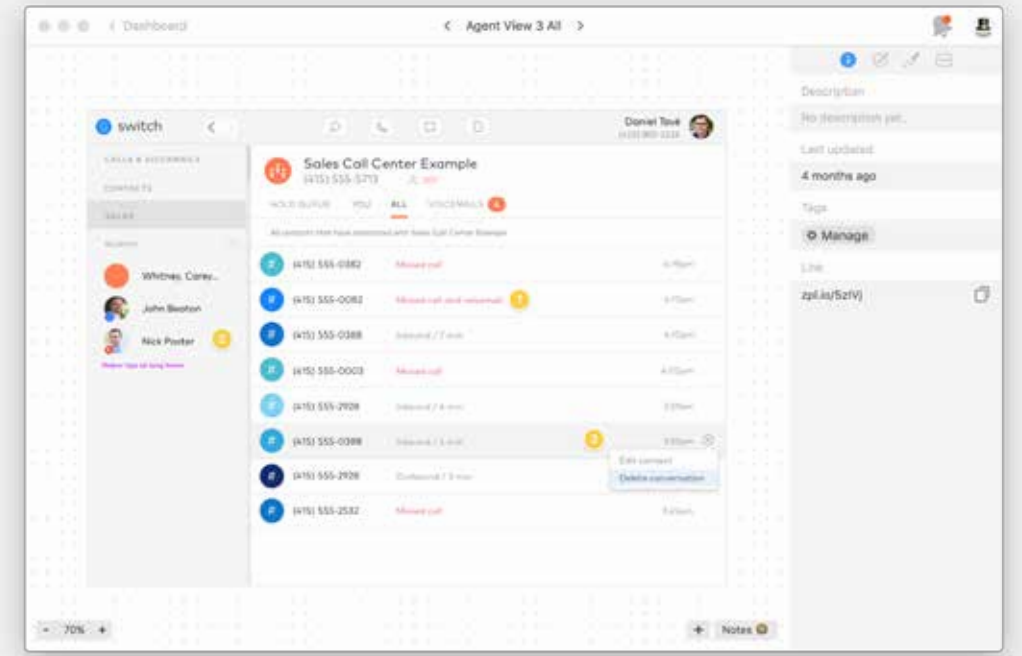
HAND-OFF:

This redesign meant creating new visual design guidelines and providing engineers with detailed UX and interaction specs

? → RESEARCH → DISCUSS! → SKETCH → DISCUSS! → HAND-OFF → ✓

09 SOLVING PROBLEMS

Designing for Scalability

Not long after product launch, the focus of the company shifted from small businesses to enterprise, meaning the app had to transform from a simple business calling app with a small footprint into a framework that could match the growing customizability and complexity of an enterprise phone service.

Potential Customer

Dialpad Customer

1. Brand Awareness

2. Consider and Evaluate

3. Decide, Try and Buy

4. Getting Set Up (Onboarding)

5. Short-term retention

6. Long-term Retention

CUSTOMER ACTIONS & EMOTIONS

1.1 Noticing the brand and sparking interest

Blog posts, social media, targeted emails, trade shows

1.2 Perceiving Dialpad as a strong player in the industry

Website, trade shows, press, case studies

☹ *Skepticism; we're a new player in the game.*

1.3 Suggesting Dialpad to IT or company admin

Website, Dialpad brand perception/ reputation

☹ *Worry! "It is risky endorsing a new company"*

2.1 Comparing with existing solutions and other vendors

Website, landing pages, calls and demos with sales reps, webinars, promo videos

2.2 Sharing resources with company decision-makers

Website, case studies, datasheets, spreadsheets, ebooks

☹ *Overwhelmed. "I've received so many datasheets but they are hard to keep track of."*

❓ *Make a resources page on the Dialpad website that is easy to find, search & share*

2.3 Learning how Dialpad can improve the way they work

Promo videos, pitch decks, proposals, and demos, calls and emails with sales reps

☺ *Feeling supported.*

❓ *Uses cost/time-heavy resources; what are more effective ways of educating?*

3.1 Looking at some use cases

Case studies, testimonials

3.2 Inquiring about change management

Sales pitch video, system reqs datasheet, case studies

☹ *Worry! Doubt!*

❓ *Neatly package Admin Help resources just for people moving from other services*

3.3 Needing that last bit of convincing

ROI calculator, calling rates guide, Help center pages

☺ *Excited! "These resources show that my company will save money!"*

❓ *The Help Center can be a great place for potential leads to research product features!*

4.1 Looking for help with company setup

Help from sales reps, user setup guides (slides), onboarding emails, implementation tips (slides), quick setup datasheet, Dialpad IT kit

☹ *Intimidated. "Can I set this up by myself?"*

❓ *Beef up the Help Center with thorough, searchable guides (not slideshows) so sales reps don't need to help*

4.2 Looking for help with employee set up

Onboarding emails, in-app walkthroughs

☹ *Irritated. "People come to me for help."*

❓ *Write clearer onboarding emails for employee setup*
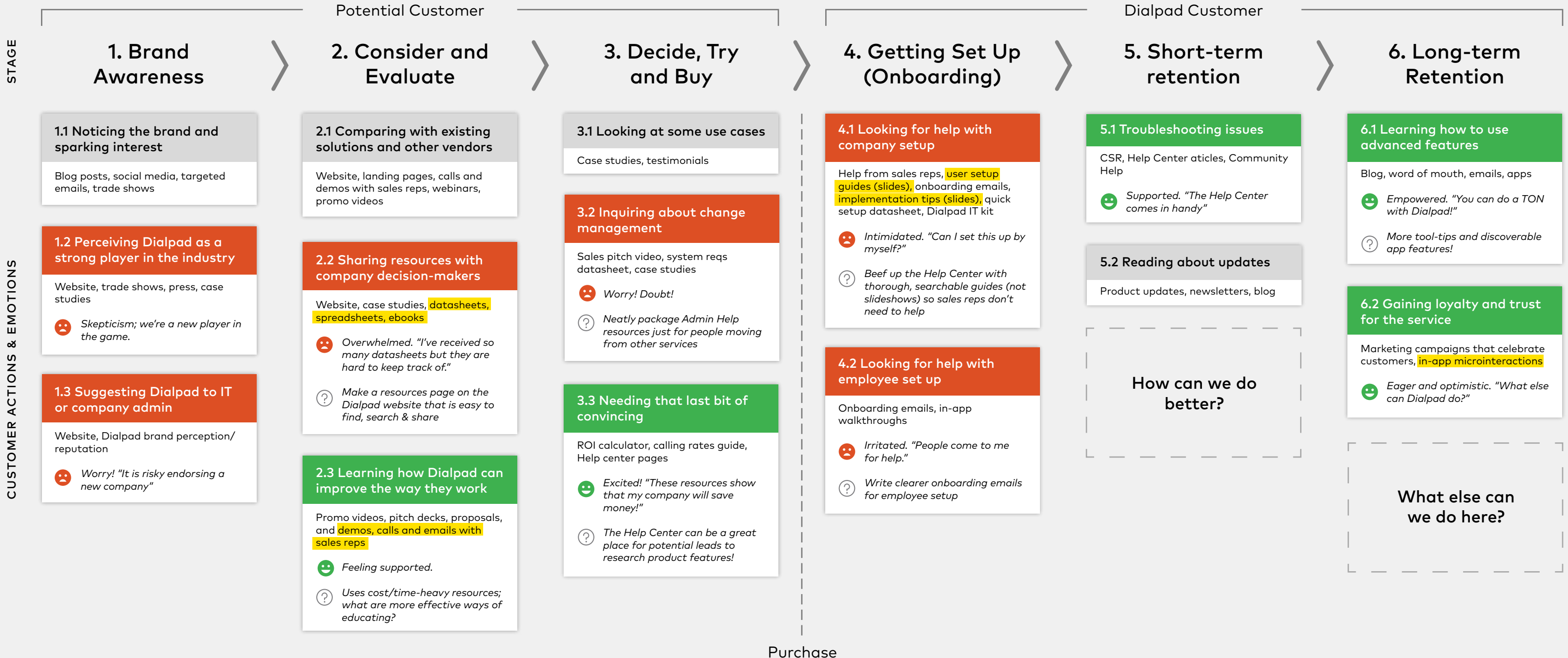
5.1 Troubleshooting issues

CSR, Help Center aticles, Community Help

☺ *Supported. "The Help Center comes in handy"*

5.2 Reading about updates

Product updates, newsletters, blog

How can we do better?

6.1 Learning how to use advanced features

Blog, word of mouth, emails, apps

☺ *Empowered. "You can do a TON with Dialpad!"*

❓ *More tool-tips and discoverable app features!*

6.2 Gaining loyalty and trust for the service

Marketing campaigns that celebrate customers, in-app microinteractions

☺ *Eager and optimistic. "What else can Dialpad do?"*

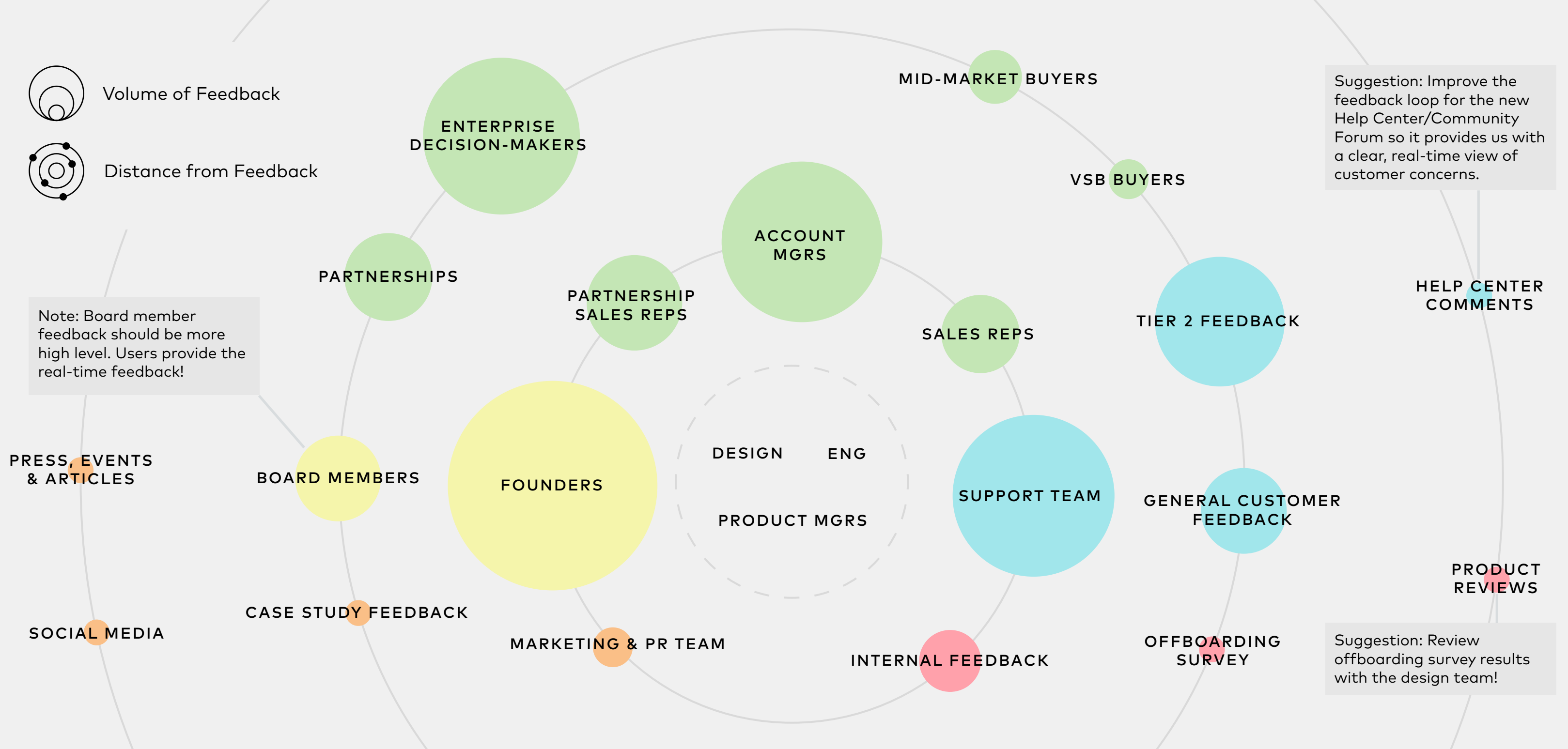What else can we do here?

Purchase

10 SOLVING PROBLEMS

Customer Journey

The Dialpad customer journey follows the typical sales or marketing funnel while intentionally poking holes in the way we currently create and organize customer resources. The UX team organized a workship across various teams (marketing, product, sales, design) to brainstorm possible solutions for the problems we found.

Legend:
- Volume of Feedback
- Distance from Feedback

MID-MARKET BUYERS

ENTERPRISE DECISION-MAKERS

VSB BUYERS

Suggestion: Improve the feedback loop for the new Help Center/Community Forum so it provides us with a clear, real-time view of customer concerns.

PARTNERSHIPS

ACCOUNT MGRS

PARTNERSHIP SALES REPS

HELP CENTER COMMENTS

Note: Board member feedback should be more high level. Users provide the real-time feedback!

SALES REPS

TIER 2 FEEDBACK

DESIGN   ENG

PRESS, EVENTS & ARTICLES

BOARD MEMBERS

FOUNDERS

PRODUCT MGRS

SUPPORT TEAM

GENERAL CUSTOMER FEEDBACK

PRODUCT REVIEWS

CASE STUDY FEEDBACK

SOCIAL MEDIA

MARKETING & PR TEAM

INTERNAL FEEDBACK

OFFBOARDING SURVEY

Suggestion: Review offboarding survey results with the design team!

11 SOLVING PROBLEMS

Stakeholder Map

Having an understanding of where feedback comes from allows an organization to approach feature requests with more clarity.

This map explains where feedback often comes from, and why.

Design x Dialpad

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