BANZAI PIPELINE

BRINGING NUMBERS TO LIFE

L7.2

View this pdf page-by-page with your "left" and "right" arrow keys versus with your "up" and "down" arrow keys.

This best simulates the scenario sequences and animated transitions.
Banzai Pipeline
The Sales Game
John Armitage, Geff Gilligan, Hamilton Meyer
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Rendered in the environment of SAP’s UXNext Team’s UX3 Design Language
Game Mechanics Applied to CRM Sales

Games:

Have a Graphically Rich and Responsive User Interface
Provide Clear and Relevant Purpose, Goals, Status, and Feedback
Thrive with Collaboration and Competition
Leverage Physical Metaphors Where Meaningful
Are Highly Personalized to Users
The Sales Game Premise

Sales is the business activity most closely resembling a game. In fact the cyclical sales quota and pipeline metaphor already leverage real-life metaphors to depict status and progress in a more meaningful way.

The Sales Game focuses on the Pipeline Management use case scenario. For context, the scenario takes place within an overall sales automation application rendered with the UX3 Concept Car environment.

The game element depicted is called the Banzai Pipeline. This is a hybrid game/analytic for visualizing and acting upon an enterprise sales pipeline, from the complete rollup to an individual sales rep.

The Pipeline leverages UX3 concepts of unique spaces dedicated to different work modes, and the collaborative features of Streamwork. However, its primary examples of game mechanics are in its forms of visualization and interaction design, primarily by using the Pipeline metaphor in a non-literal manner, i.e. no need to depict any “pipes”.
The Banzai Pipeline is an interactive visualization for sales people to check the status of their deals in various stages. Targeting the use case of a sales team managing their pipeline — the metaphor used to describe the set of deals in various stages of progress — it uses a collaborative “gameboard” visualization.

Here we see a comparison of current deals in each of five pipeline stages, in orange, compared to the previous year, in blue, and the goal, in green. Our user, Melinda, manages a sales team, and this is her view of the overall team’s performance. Her staff, and her position in the larger sales org, are shown in the hierarchy on the left.
We can see that we are losing many deals from the Qualification stage to the Analysis stage, to a point well under the goal, and that this can cause underperformance later on in the cycle.
She looks at dropped deals in the Analysis phase and sees that the problem is that they are losing deals in this phase, versus for example not having enough deals coming into the phase.
Melinda decides to take up this issue with her team. She returns to her original view and decides to create a new Streamwork Activity to help find a solution.
She converts the relevant deals into a working matrix by dragging them onto the canvas, and asks the team to re-calibrate them to create a more accurate forecast.
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This participant can also open the Deal Inspector which contains all system data about this object, plus related items.
Over time, the team asynchronously drags and drops their own deals to the cells best representing the deals’ overall prospects. They do this within the Streamwork Activity.

The pipeline becomes smaller due to the growing pessimism about closing deals.
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The pipeline becomes smaller due to the growing pessimism about closing future deals.
As Host, Melinda can commit these data changes to the pipeline database.
A new Streamwork Activity opens and she invites Rod to participate.
Melinda annotates his quarterly goals by dragging several deals to the phases where she proposes they should reside by quarter's end.

The arrows here would actually display to convey the changes she had made.
Rod sees her proposal and reacts that he will need more resources to do this, and proceeds to inspect his deals to determine the details.
He moves the selected deals out onto the surface to be rendered as a table.
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Rod asks for internal and external consultants to help him reach his goal. Melinda ups the ante then agrees.
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He uses the Price Configurator to create the different options. The sale is a software product that would involve costs in multiple categories.
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He then commits his changes to the deal proposal.
The Mobile Pipeline

The most game-like element in the Banzai Pipeline is the gameboard view, that renders deals as poker-chip-like tokens. This is easily rendered on a mobile device.
In the mobile version, the same model is used.
Users edit their deal status on the gameboard with gestures.
This is the deal inspector.
Users can also model their bonus compensation by manipulating variables such as closing date and price.
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