

Mobile Touchpoints

for users
 for UX and/or tech team
 another system's responsibility

I want to...	Frequency (per month)	Mobile Probability 0.0 - 1.0	Drivers	Info Context	Personas				Notes
					FSM	Controller	Operations	Admin	
Delegate my pricing work	0.30	0.30	I'm leaving I've already left & I forgot to do this	list of valid delegates valid forms/scopes of delegation		delegate	delegate		Easy to forget to do till you're on the road, so great for mobile. Do we want this to include things like time limits? It's very easy to forget and leave it off after you return.
Approve / Deny	2.36	0.20	The customer agreed to our proposal	List of scenarios that can be awarded	apply		triage capture approve		This one's a no-brainer. If you get the word, no matter where you are, you can convey it to the system and get the downstream ball rolling.
Analyze deviations from standard pricing	1.00	0.20	???	???		visualize filter search			On mobile, we're just talking one or two summary visualizations. They can do detailed reporting when they're at their laptops. This is just to spot significant deviations while away. What framework(s) are we using and/or contemplating for graphing?
Analyze requests for assistance	1.00	0.20	???	???		visualize filter search			See "Analyze deviations..." touchpoint. All of the same points apply. Quick summary visualization to spot problems while on the road.
Learn to use mobile pricing workbench	0.70	0.20	I just started with Cisco pricing I need to use a new feature I forgot how to do something	Tool overview High-level workflows Detailed procedures links to related pricing help topics	search suggest tour	search suggest tour		tour	May be unnecessary, if we can stick to an all-affordance diet on the mobile design. If needed, it's a simple 2-4 page slideshow.
Present pricing comparison	4.00	0.10	I've got a planned presentation I'm fielding an add-hoc request	Agreed-upon KPIs for 2-n chosen scenarios	collect compare search filter master/detail	collect compare search filter master/detail			Remember, will be shown to customers frequently to illustrate tradeoffs. Spend time on visual design for this feature. Consider graph at top level on mobile.
Provide pricing assistance	0.24	0.05	I was asked by an FSM I decided to	scenario summary & details why does FSM think I'll agree? Other info regarding this deal (code)	apply discuss	approve compare master/detail triage discuss			Note history access. Can exchange get bigger than two notes, one each? Rapid scenario comparisons. Work on triage algorithm from assisting controller perspective. This might be useful on mobile to approve the easy ones, only.
Construct pricing scenario	6.65	0.02	I'm responding to an RFP I'm responding to an informal request Client is unhappy with the last proposal	Customer's financial needs/desires fast scenario-tweak feedback	master/detail search filter disclose	master/detail triage search filter disclose			Key is keeping it all on one screen, with appropriate progressive disclosure that preserves nav-context. Not mobile-appropriate.
Construct BOM for customer	6.11	0.02	I'm responding to an RFP I'm responding to an informal request Client is unhappy with the last proposal	Customer's technical needs Cisco's "catalog" running cost totals & sub totals Any other math / indicators needed?	shopping cart search filter suggest template	shopping cart search filter suggest template			Seems as foolish as "Construct a pricing scenario" as a mobile touchpoint.
Double check my scenario	3.39	0.02	I'm planning on a presentation I like to check my work as I go	Feedback, with positional context, on non-compliance Possible remedies for non-compliant points	apply discuss	triage approve discuss			This is currently called "finalize". Since it can be finalized n times, it's a dishonest term. Needs a real name, but it's more like "check compliance" than it is "finalize". It's something you'd typically do after an edit session. If we're not editing scenarios on mobile, this is unnecessary.
Create a standard scenario	2.00	0.02	I want to save time over doing it from scratch I want to enforce standards	previous templates list visualization of / guidance for, visibility levels	template suggest	template suggest			If we're not doing "Construct a pricing scenario" on mobile, this seems foolish, too.
Update rates	1.00	0.02	It's time to do so (monthly)	new rates				search	Really straightforward. We can make it easier to use with simple, standard UX mechanisms. Remember, this is the tiniest user cohort. No need to provide mobile version of Admin functions.
Update scenario rules	1.00	0.02	A relevant policy changed A new policy was added A policy was retired	current set of scenario rules new policies				search	Really straightforward. We can make it easier to use with simple, standard UX mechanisms. Remember, this is the tiniest user cohort. No need to provide mobile version of Admin functions.
Manual reprice	1.00	0.01	I was asked by Operations	Provided scenario details		triage master/detail	apply		Manual Reprice needs a better, more descriptive name. It's not a manual reprice at all. It's a temporary data-entry work-around. As such, mobile is an inappropriate data-entry tool.
Construct & share a formal proposal	0.94	0.00	Operations told me it's a go	scenario overview scenario details	search master/detail				Nice opportunities here. You could generate & email a customer proposal, or share in other ways. How do we alert the user that a scenario is a go?