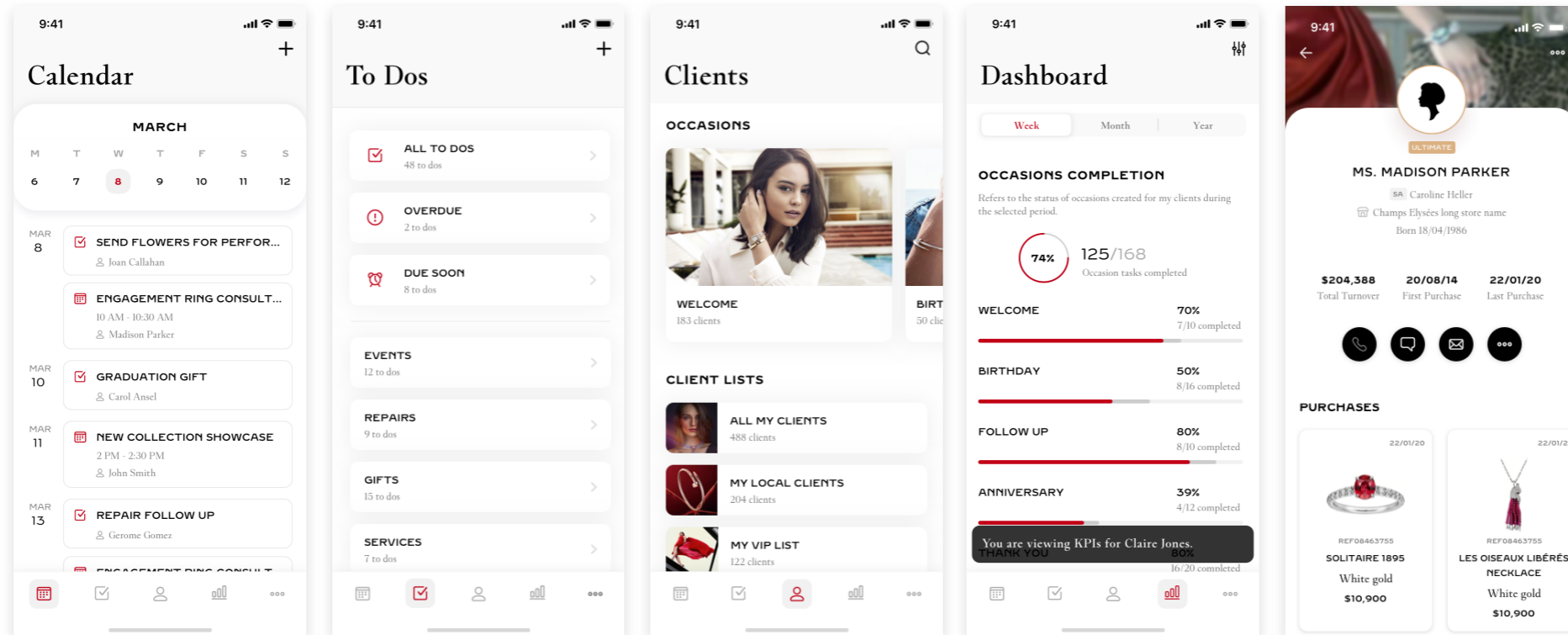# CASE STUDY

CARTIER CLIENTELING APP

BACKGROUND

THE PROJECT

My employer, Balink, is in the niche market of creating iOS apps that integrate with Salesforce. The most common type of app that we do centers around clienteling - advanced sales strategies centered around cultivating one-on-one relationships between sales advisors and clients. These apps allow sales advisors to access data on their clients while working on the sales floor, manage their agendas, track their performance KPIs, and more. We needed to create a clienteling app tailored to the needs and branding of Cartier.

MY ROLE

I was the sole UI/UX designer on the project. Because this was not Balink's first clienteling app, the general UX architecture was already established. **My task was to design brand-new UI that would marry Cartier's branding with iOS best practices and trends, and to customize the UX to Cartier's particular desires and needs, accommodating new feature requests into the existing app structure.** I participated in workshops with the client to propose mockups, collect feedback, and iterate.
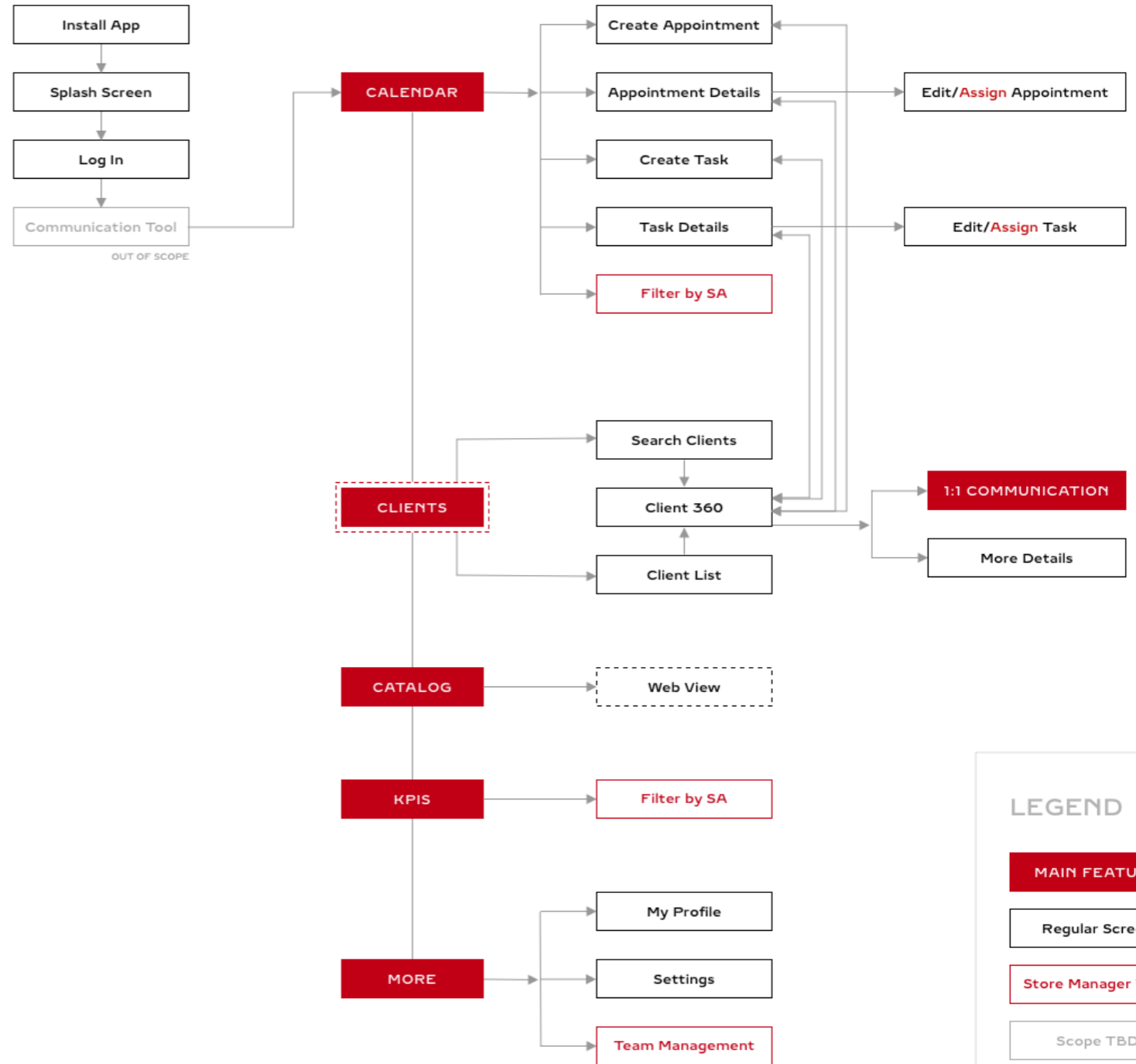
PROCESS

Balink works in agile and design sprints, as opposed to a linear design process. The project went something like this:

- I designed a POC to pitch the project with key screens in high fidelity

- The project manager and CTO defined the scope and MVP requirements with the client

- I established visual language for the app by learning about Cartier's branding, researching relevant trends, gathering shots for inspiration, trying things out directly on real screens, and ultimately compiling a design system

- We had one workshop on each main feature. In advance of each workshop, I designed the screens and sent a prototype via Invision, along with a video demo. At the workshop, I presented the design and collected feedback and clarification. After the workshop, I iterated accordingly.

- Development happened in parallel after each feature was established. I assisted developers with handoff and revised the designs based on technical requirements as they arose.

- I created a comprehensive user guide for the app.

APP MAP

Even though the UX was generally established for Balink's clienteling apps, every company wants a slightly different arrangement of features. **This is the app map I designed early on in the project to show Cartier what to expect.**

The architecture evolved as the project went on; for example, Cartier chose not to include their catalog inside the app, and instead to have a tab dedicated to task management.

Install App

Splash Screen

Log In

Communication Tool

OUT OF SCOPE

CALENDAR

Create Appointment

Appointment Details

Create Task

Task Details

Filter by SA

Edit/Assign Appointment

Edit/Assign Task

CLIENTS

Search Clients

Client 360

Client List

1:1 COMMUNICATION

More Details

CATALOG

Web View

KPIS

Filter by SA

MORE

My Profile

Settings

Team Management

LEGEND

MAIN FEATURE

Regular Screen

Store Manager View

Scope TBD

Requires Discussion

COLLECTING INSPIRATION

I invested a lot of time in the start of the project with researching UI directions on sites like Dribbble and Pinterest, as well as reviewing tons of iOS apps.

I collected examples based on some of the key types of elements I'd need to design: lists, cards, a calendar, a very detailed profile, and a dashboard, for example.
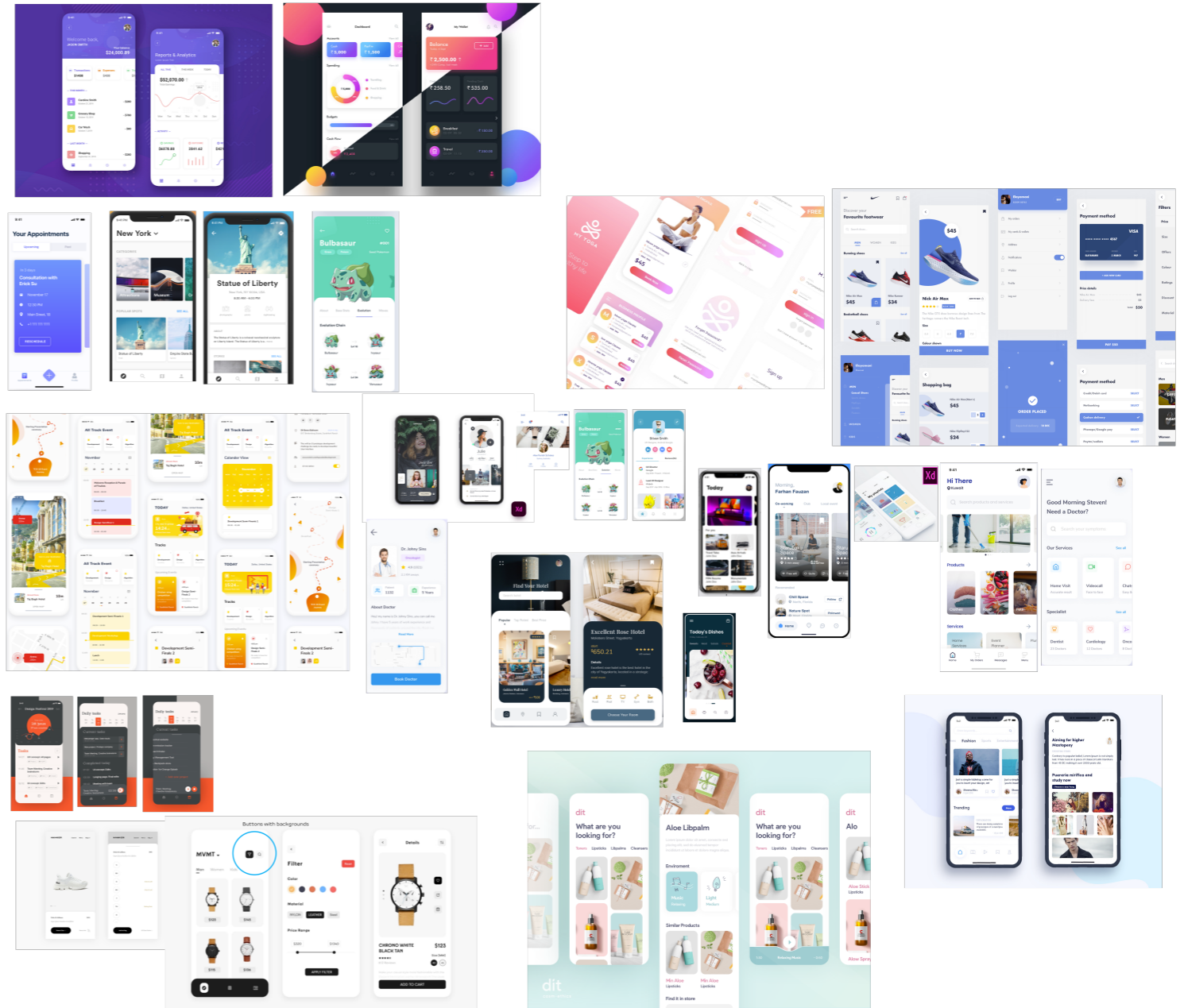
UI BRAINSTORM

I tried out UI directions for the app using the Clients main tab screen as an example. I varied components like cards, search, the tab bar, tabs, and headers.
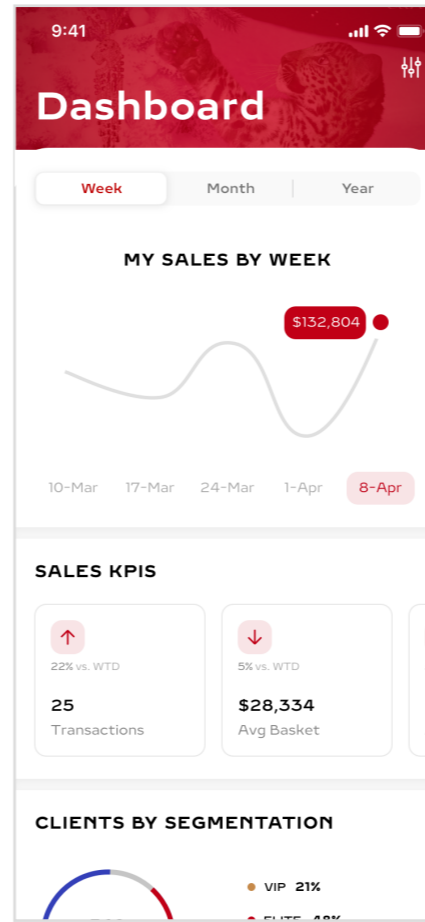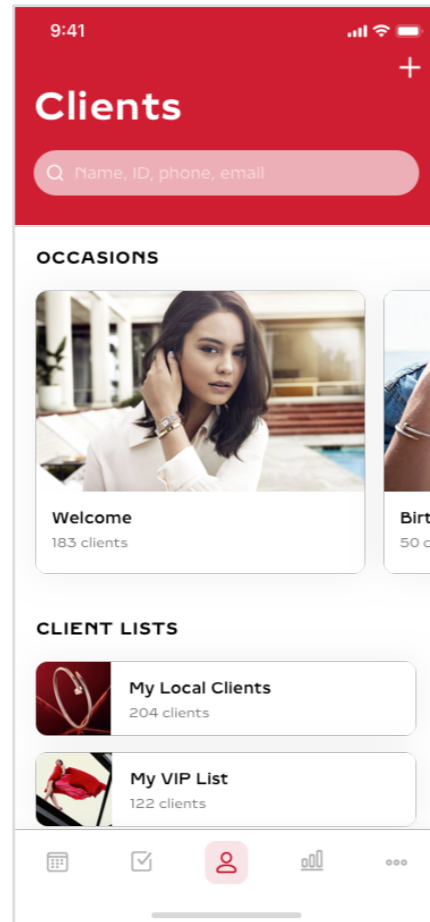
I was looking to determine some key component styles that I could use consistently through the app to carry a sense of unity and make the design feel very intentional.
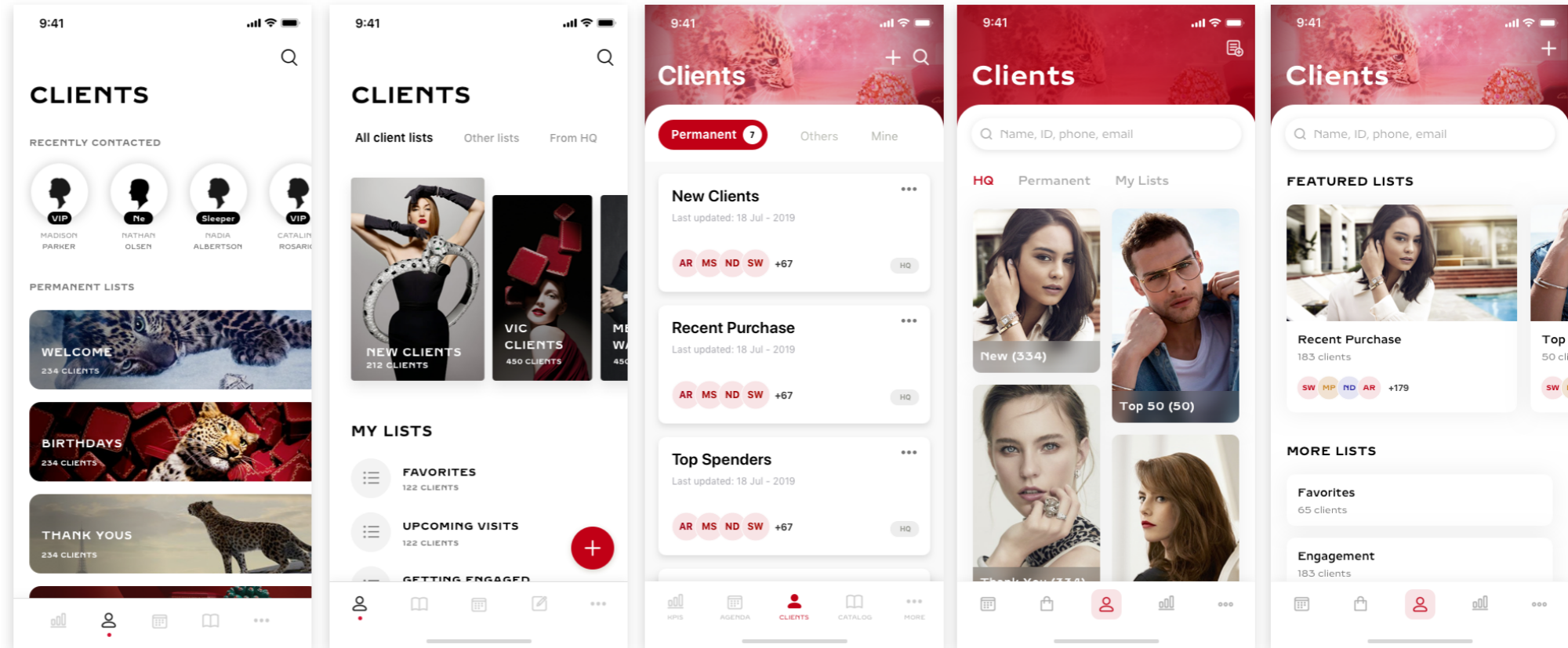
FIRST DRAFT OF UI

With internal feedback from my company, **I zeroed in on a design direction and designed some more screens** to give the client a sense of where it was going.

I had to make some adjustments due to feedback from developers on the feasibility. Certain screens couldn't support a picture in the header, for example, or rounded corners over the header, so I adapted accordingly.

DESIGN SYSTEM

Cartier is updating all their branding, so they sent me their plans for their new design system. **The challenge was, the design system Cartier sent me was for web. The clienteling app's UI would require many more icons, more colors, more text styles, and iOS-oriented components.**

On the right is a sample of the design system I proposed to them with the aim of **finding the balance between using Cartier's existing branding and expanding it to meet the needs of a data-packed iOS app.**

COLORS

#C10016
Highlight color, headers, link text, segmentation: elite

#000000
Text, icons, primary buttons

#767676
Secondary text, segmentation: inactive

#AAAAAA
Tertiary text, inactive icons

#E8E8E8
Outlines

#F9F9F9
Backgrounds
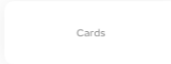
#F8E4E6
Highlight background
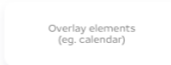
#39901D
Success
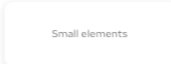
#333FB8
Segmentation: new

#C68A4A
Segmentation: VIP

SHADOWS

Cards

Overlay elements
(eg. calendar)

Small elements

Reverse Shadow
(eg. tab bar)

TYPOGRAPHY

Brilliant Cut Pro / Fancy Cut Pro

LargeTitle
Headers for main tabs
Brilliant Cut Bold 34pt

Title 1
Modal title
Brilliant Cut Bold 28pt

HEADLINE
Section titles, internal screen headers
Brilliant Cut Bold 15pt, .5 letter spacing, all caps

Subhead
Label for cells, card titles, search
Brilliant Cut Regular 14pt

Body
Appointments, tasks, notes
Fancy Cut Regular 16pt, .5 letter spacing

Callout
Secondary details, product materials
Fancy Cut Regular 13pt

Footnote
Card details, calendar dates
Brilliant Cut Regular 12pt

Caption 1
Details on appts, tasks, notes
Brilliant Cut Regular 11pt

Caption 2
Chart labels, dates
Brilliant Cut Regular 9pt

Link text
Link text
Brilliant Cut Medium 11pt

SEGMENTATION
Segmentation labels
Brilliant Cut Medium 9pt, all caps

ICONOGRAPHY

BUTTONS AND CONTROLS

PRIMARY

SECONDARY

Label   Label

PLACEHOLDERS

Find Clients
Please search clients by name, ID, phone number, or email address.

MODALS AND TOAST NOTIFICATIONS

Connection Timeout
Oops! Please refresh your connection to access the app.

GOT IT

You have shared **2 products** with **Madison.**
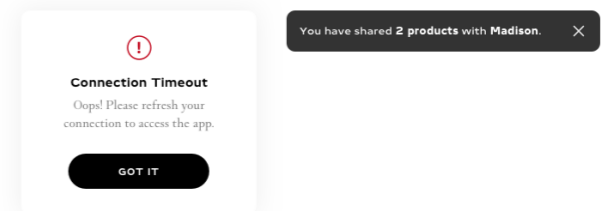
DESIGN SYSTEM CHANGES

Cartier's branding team told us about several rules of their new design system which hadn't been clear based on the web-oriented samples I had access to. Implementing these rules would require **significant redesign of the UI**, and some challenged iOS best practices.

- Their custom sans-serif font must only be used in all-caps. This was a challenge because iOS forbids all-caps page headers, and sans-serif title case is typically what's used for content like names and body text

- Red is only to be used on text and icons, not fill colors or overlays

- No pink may be used, including as a transparent version of their red

- They actually had secondary color palettes I could use for color-coded tags needed in the app - win!

Thankfully, **I had set up my Sketch file in a smart way based on symbols and styles, so implementing app-wide changes was actually quite fast to do. I created two options for them, adapting to their additional design requirements in different combinations of ways.** They made their selection, and we moved on.

FINAL UI SAMPLES: CLIENT LISTS AND PROFILE

Here are some samples of how the UI looked after adapting to Cartier's new design system rules.

Screen 1 — Clients

9:41

Clients

OCCASIONS

WELCOME
183 clients

BIRT...
50 clic...

CLIENT LISTS

ALL MY CLIENTS
488 clients

MY LOCAL CLIENTS
204 clients

MY VIP LIST
122 clients

Screen 2 — Generic Clients

9:41

GENERIC CLIENTS

Search for a client

AUDREY RENOLDS
TOP VIP
Last contacted 26/03/20
Last purchase 02/02/20

SANDRA CHANDLER
INITIATE JEWELLERY
Last contacted 26/03/20
Last purchase 02/02/20

CARL ANDOVER
ACCESS WATCHES
Last contacted 26/03/20
Last purchase 02/02/20

MADISON PARKER
ULTIMATE
Last contacted 26/03/20
Last purchase 02/02/20

COURTNEY LEVERTOV
VIP
Last contacted 26/03/20
Last purchase 02/02/20

PEDRO MENDEZ
LOYAL SUPER FREQUENT
Last contacted 26/03/20
Last purchase 02/02/20

Screen 3 — Profile

9:41

ULTIMATE

MS. MADISON PARKER

SA Caroline Heller

🏪 Champs Elysées long store name

Born 18/04/1986

$204,388   **20/08/14**   **22/01/20**
Total Turnover   First Purchase   Last Purchase

PURCHASES

22/01/20
REF08463755
SOLITAIRE 1895
White gold
$10,900

22/01/20
REF08463755
LES OISEAUX LIBÉRÉS NECKLACE
White gold
$10,900

Screen 4 — Calendar / Wishlist

9:41

MS. MADISON PARKER

CALENDAR

☑ **SEND FLOWERS FOR PERFORMANCE**
Due 20 Mar

📅 **SHOP FOR ENGAGEMENT RINGS**
22 Mar, 10 AM - 10:30 AM

View all   Add to Calendar

WISHLIST (6)

CLASH DE CARTIER RING   22/01/20
Added in store by Caroline Heller
REF0823847

TRINITY SUNGLASSES   22/01/20
Added by retail
REF0823847

View all   Add to Wishlist

INTERACTIONS

Screen 5 — Interactions / Notes

9:41

MS. MADISON PARKER

INTERACTIONS

📞 **PHONE CALL**   03/04/20
Caroline Heller

💼 **PURCHASE: $21,800**   22/01/20
Jeffrey Denson, New York - Madison Avenue

💬 **WHATSAPP**   20/01/20
Caroline Heller

View all

PERSONAL NOTES

DO NOT ASK ABOUT FAMILY; SENSITIVE...   02/09/16
Caroline Heller

View all   Add a note

OCCASIONS

BIRTHDAYS   DUE IN 5 DAYS
Birth date 27/04/87   ● OPEN

FINAL UI SAMPLES: CALENDAR AND TASKS

Screen 1: Calendar

9:41

Calendar

+

MARCH

M	T	W	T	F	S	S
6	7	8	9	10	11	12

MAR 8 — ☑ SEND FLOWERS FOR PERFOR...
👤 Joan Callahan

📅 ENGAGEMENT RING CONSULT...
10 AM - 10:30 AM
👤 Madison Parker

MAR 10 — ☑ GRADUATION GIFT
👤 Carol Ansel

MAR 11 — 📅 NEW COLLECTION SHOWCASE
2 PM - 2:30 PM
👤 John Smith

MAR 13 — ☑ REPAIR FOLLOW UP
👤 Gerome Gomez

ENGAGEMENT RING CONSULT...

Screen 2: Engagement ring consultation

9:41

✕   EDIT

Engagement ring consultation

STARTS	WED, 8 MAR AT 10:00 AM
ENDS	WED, 8 MAR AT 11:00 AM
CLIENT	MADISON PARKER
NOTES	

Interested in a sapphire diamond combination

DELETE

Screen 3: To Dos

9:41

To Dos

+

☑ **ALL TO DOS**
48 to dos 〉

⊙ **OVERDUE**
2 to dos 〉

⏰ **DUE SOON**
8 to dos 〉

EVENTS
12 to dos 〉

REPAIRS
9 to dos 〉

GIFTS
15 to dos 〉

SERVICES
7 to dos 〉

Screen 4: Due Soon

9:41

←   **DUE SOON**

○ SEND FLOWERS FOR PERFORMANCE   TODAY
👤 Joan Callahan

○ CHECK IN ABOUT REPAIR   10-MAR
👤 Carol Ansel

○ REMIND TO BRING WATCH TO APPT   13-MAR
👤 Gerome Gomez

○ FOLLOW UP WITH THOMAS   13-MAR
👤 Thomas Hunter

○ REACH OUT TO CASSIE   15-MAR
👤 Cassie Karni

○ ORGANIZE WINDOW DISPLAY   8-MAR

○ CONGRATULATE TAYLOR   13-MAR
👤 Taylor Lindsay

○ REACH OUT TO NORENE   15-MAR
👤 Norene Gibilsi

SHOW COMPLETED TO DOS

Screen 5: Send flowers for performance

9:41

✕   EDIT

Send flowers for performance

DUE	WED, 8 MAR
CLIENT	JOAN CALLAHAN
SA	CAROLINE HELLER
TYPE	GIFT
GIFT	FLOWERS
NOTES	

No notes

DELETE   **COMPLETE**

FINAL UI SAMPLES: DASHBOARD

Screen 1:

9:41

Dashboard

Week | Month | Year

OCCASIONS COMPLETION

Refers to the status of occasions created for my clients during the selected period.

74% — **125/168** Occasion tasks completed

WELCOME — **70%** — 7/10 completed

BIRTHDAY — **50%** — 8/16 completed

FOLLOW UP — **80%** — 8/10 completed

ANNIVERSARY — **39%** — 4/12 completed

You are viewing KPIs for Claire Jones.

THANK YOU — **80%** — 16/20 completed

Screen 2:

9:41

DASHBOARD

Week | Month | Year

INTERACTIONS BY SEGMENTATION

488 total interactions

- 20 ULTIMATE **4%**
- 10 TOP VIP **2%**
- 15 VIP **3%**
- 20 LOYAL OCCASIONAL **4%**
- 29 LOYAL SUPER FREQUENT **6%**
- 20 NEW RISING STAR **4%**
- 40 EXISTING RISING STAR **8%**
- 38 ACCESS WATCHES **8%**
- 73 ACCESS ACCESSORIES **15%**
- 68 ACCESS BIJOUX **14%**
- 97 INITIATE JEWELLERY **20%**
- 58 INITIATE WATCHES **12%**

DATA CAPTURE RATE

Refers to what portion of clients provided contact information during this period, broken down by type.

PHONE NUMBER — **327 CLIENTS** — 66%

You are viewing KPIs for Claire Jones. 41 CLIENTS
70%

Screen 3:

9:41

DASHBOARD

Week | Month | Year

DATA CAPTURE RATE

Refers to what portion of clients provided contact information during this period, broken down by type.

PHONE NUMBER — **327 CLIENTS** — 66%

EMAIL ADDRESS — **341 CLIENTS** — 70%

CHAT ID — **263 CLIENTS** — 53%

RESIDENTIAL ADDRESS — **390 CLIENTS** — 80%

AT LEAST ONE CHANNEL — **439 CLIENTS** — 90%

OCCASIONS ROI

Reflects the difference in average turnover in clients who were reached for each occasion compared to clients who were not reached for the same occasion.

You are viewing KPIs for Claire Jones.
+80%

Screen 4:

9:41

DASHBOARD

Week | Month | Year

OCCASIONS ROI

Reflects the difference in average turnover in clients who were reached for each occasion compared to clients who were not reached for the same occasion.

+100%
+80%
+60%
+40%
+20%
0

WELCOME | BIRTHDAY | FOLLOW UP | ANNIV. | THANK YOU

10 Appointments — **87** Products Shared

You are viewing KPIs for Claire Jones.
PROFILES CREATED — 12 Profiles

Screen 5:

9:41

✕ **FILTER BY SA** APPLY

🔍 Search an SA

🏪 **MY STORE** (16)

👤 **ME**

👤 **CLAIRE JONES** ✓

👤 **DAVID ALTERMAN**

👤 **ERIC MILLER**

👤 **GENEVIEVE CAROL**

👤 **HARRY PETERS**

👤 **ISABELLA SANTORINI**

👤 JESSICA BENDER

NEW UX FLOW: SHARING A PRODUCT

One new flow I had to design was sharing a product. **The UX solution here was complicated by technical limitations:** the catalog was housed outside the app in a website, so when you click "share product" there, it drops you into the clienteling app without context. Also, sharing behavior differs based on the limitations of each communication channel. Third, the development would rely on default iOS sharing, which could not know which communication channels (for example, email, Whatsapp, WeChat, etc) were available for this client.

THE CHALLENGES

- Give context to the user so it's clear they're in a continuation of a flow they began outside the app.

- Help the user avoid selecting the wrong client, easily caused by duplicate names or mixing clients up.

- Inform the user which communication channels are available for this client, and make sure they select a legitimate one from the iOS sharing module, which cannot show which apps the client has.

- Guide the user through the behavior of each channel, which differs due to each chatting app's technical limitations regarding sharing pictures and text.

- In the case of WeChat, WhatsApp, and KakaoTalk, provide a way for the user to rely on a text template even though those apps don't allow them to directly share images and text together,
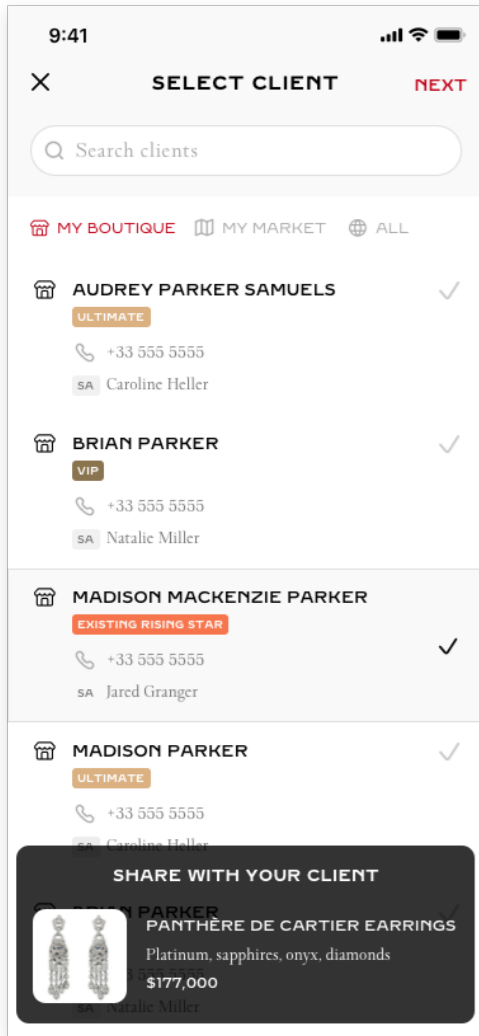
Select a client with search. A modal **reminds the user that they're sharing** with a client and shows the selected product.
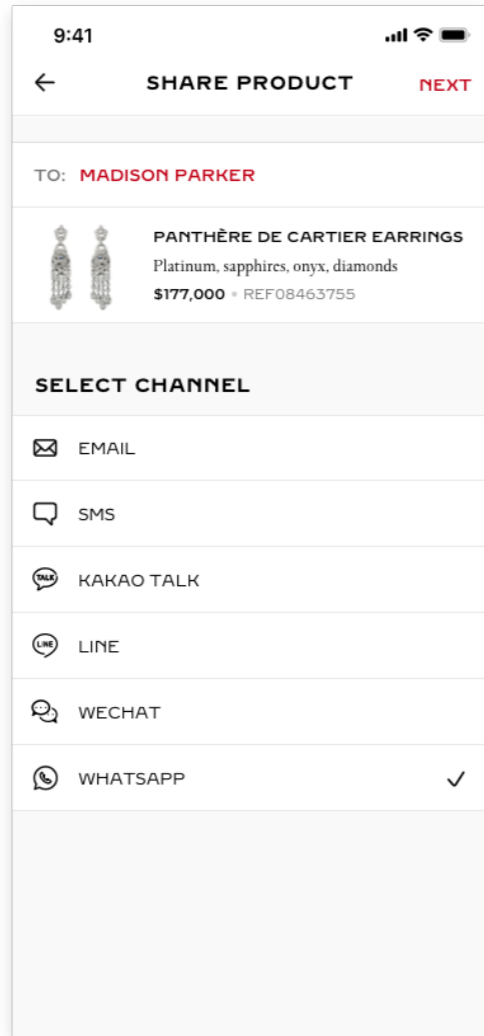
Selected client is linked so **the user can check the client profile is correct. Only her available channels** appear below.
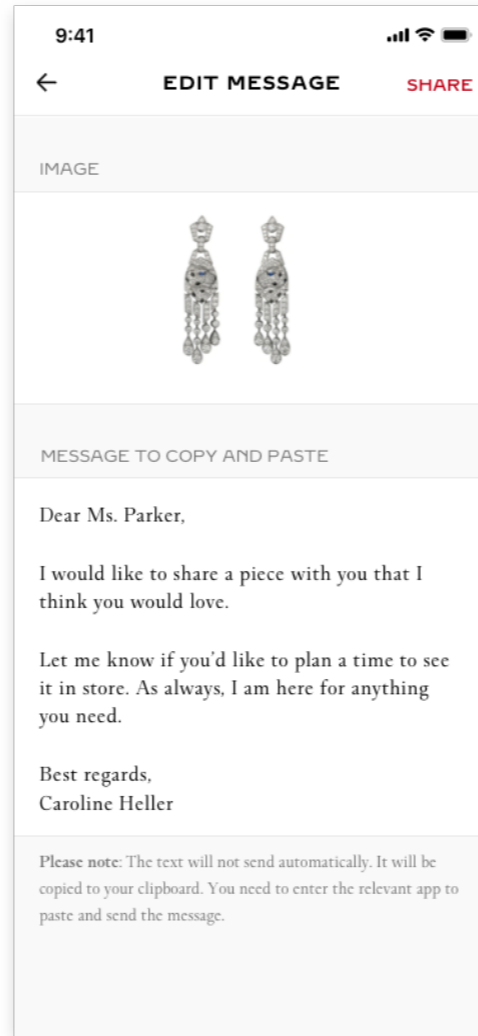
Edit message screen differs by channel. Because Whatsapp only allows sharing a picture without text, **the user can see a template message, edit it, and then it gets pasted to the clipboard.** Help text explains that it will not send automatically but rather should be pasted.
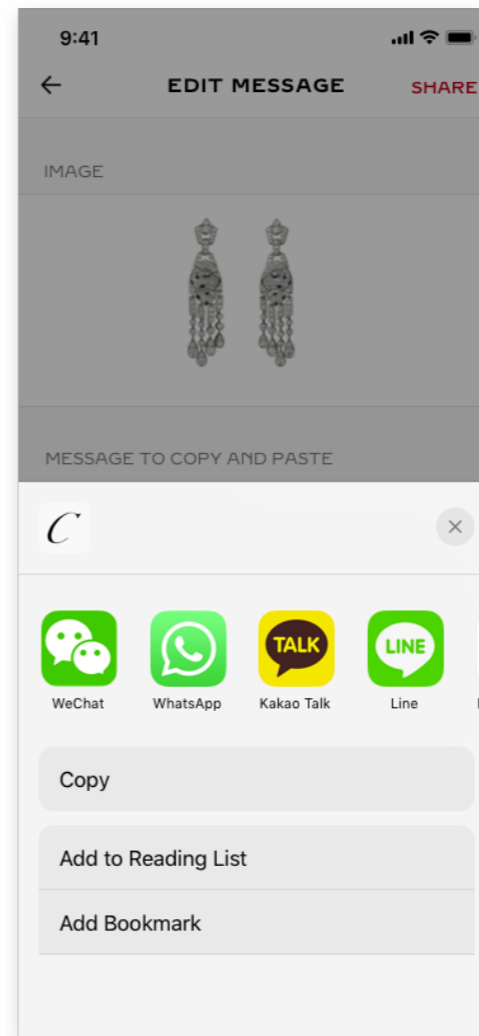
User again selects the channel chosen before from the iOS sharing options. The fact of selecting the channel twice is not ideal, but it's worth it to show the user which channels are available and prepare the image and text according to the channel they are going to use.
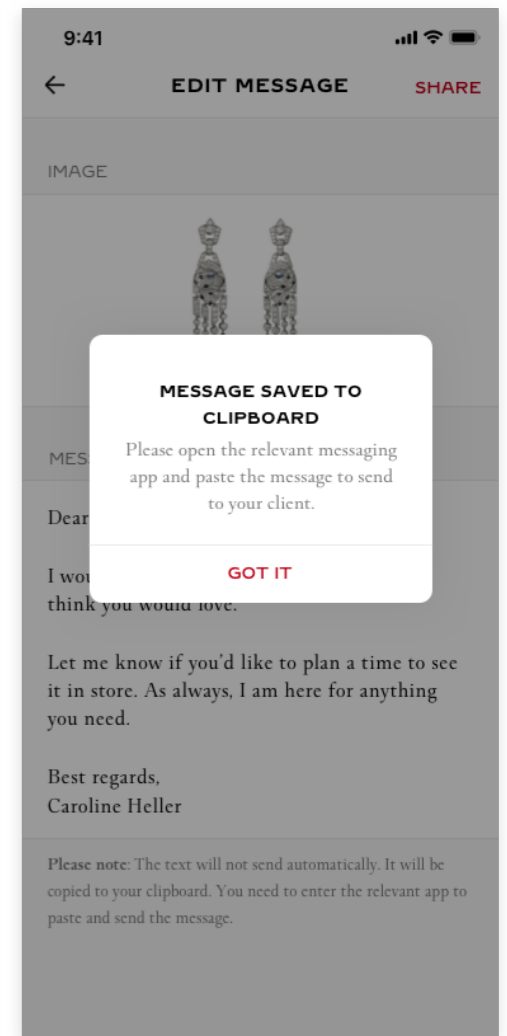
In the case of WhatsApp, WeChat, and KakaoTalk, through which we cannot share both an image and text, **a notification reminds the user that the message is saved to the clipboard** and they must go into the relevant app to send the message to the client.

USER GUIDE

Cartier required a comprehensive, step-by-step user guide in order to train their employees on using the app. I created a 50-page PDF that explains how to use each feature. Below is one example page.

USE CASE   STORE MANAGER FEATURE

I want to view KPIs for a particular SA.

1. On the dashboard, tap on the filter icon in the upper-right hand corner.

2. Select the SA whose KPIs you want to see. You can use the search bar to find someone quickly.

3. Tap **apply**.

4. Now, all the KPIs you see will be related to the SA you chose, as noted by the notification at the bottom of the screen.

To remove the filters, tap the filter icon again and select **my store.**

NOTE: By default, a store manager will view KPIs that are based on all the SAs in his store. You can select one SA at a time to view their individual KPIs; you cannot select multiple SAs.
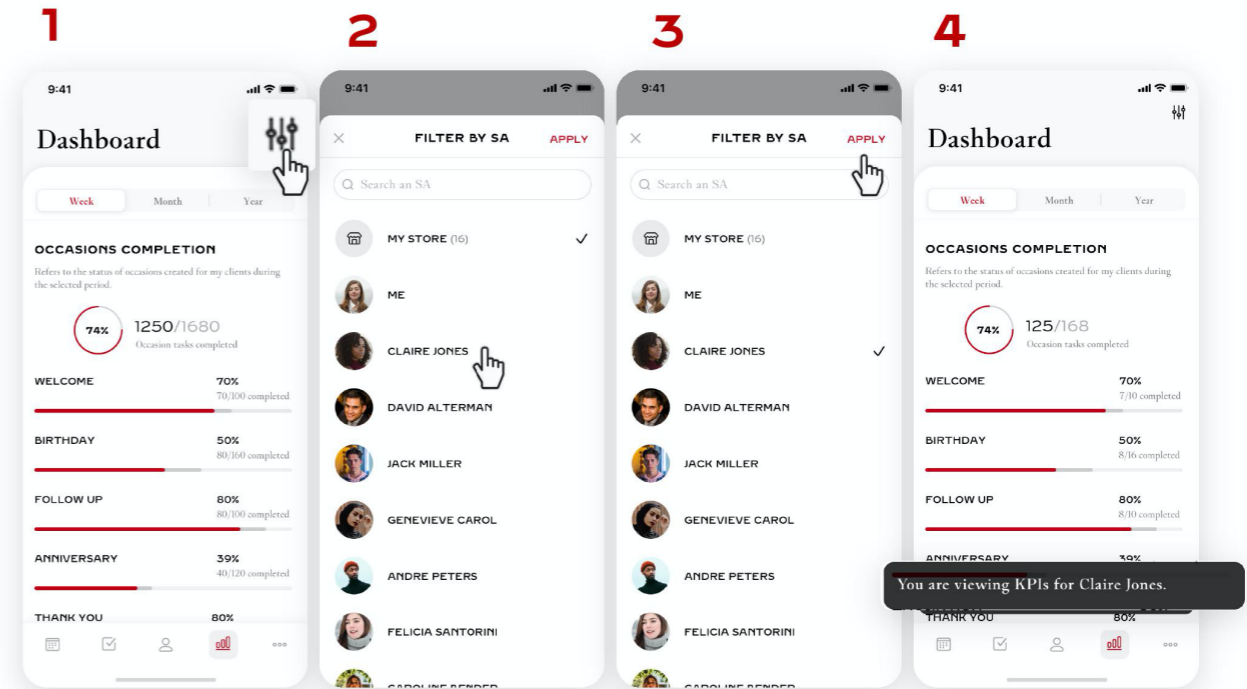
SUMMARY

FEEDBACK

Cartier's team is very satisfied with the design of the app. They feel it reflects their sales advisors' needs and their high-level brand. Once deployed, this app will increase their sales through the demonstrated effects of clienteling on brand loyalty, and they will be able to collect data they never could before in areas like contact with clients and task completion.

CURRENT STATUS

We are currently in the UAT phase of testing the app for QA before it will be deployed in several pilot stores around the world.

FUTURE DIRECTIONS

Certain functionality that Cartier hoped for could not be offered in the scope of the MVP due to added development time. In Phase 2, implementing these requests will add a lot of value to the user experience, such as allowing users to save email drafts, create their own communication templates, and create their own client lists. Our company unfortunately does not do usability testing, but we will get feedback from the pilot stores that could allow us to implement improvements in Phase 2.