RepIQ Filters Workflow UI/UX Suggestions

Instructional Text

Add context to the workflow: It isn't exactly clear which Ideal Customer Profile the user is building once they have gotten into the ICP workflow. Providing better instructional and headline text along the way would help the user understand what is happening a little better.

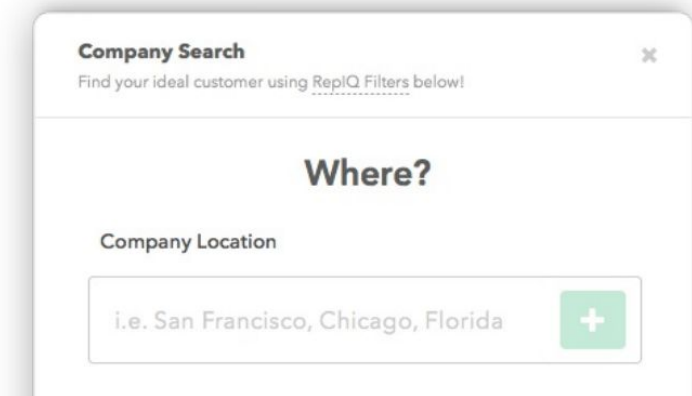|	
Company Search Once the user has selected the type of customer they are seeking, they are reassured of the type along the way with "Company Search" in the modal header. See **Fig 1.1** **People Search** In addition to the Company Search, display same "People Search" header text for proper context. See **Fig 1.2** *The subheader to the modal window provides instructional text along with some informational text hidden behind the "RepIQ Filters" tooltip. The text within this could include the available filters for the type of customer search, or just a quick synopsis of the functionality of the filters.*	**Fig 1.1** **Fig 1.2**
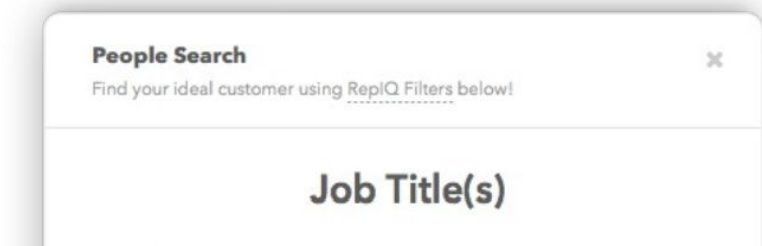
Fork in the Road

Fork in the Road There has been feedback that the ICP workflow is a little confusing and the user isn't sure what they are providing filter information for. To alleviate this confusion, present the user with the clear option to choose what they are looking for - People or Companies. See **Fig 2.1** Presenting the fork in the road with only two clear options for the user, no matter where the "RepIQ Filters" button is clicked, will help communicate to the user what they are going to be working towards when beginning the ICP workflow.	**Fig 2.1** RepIQ Filters Search ✕ **What are you looking for?** Companies People
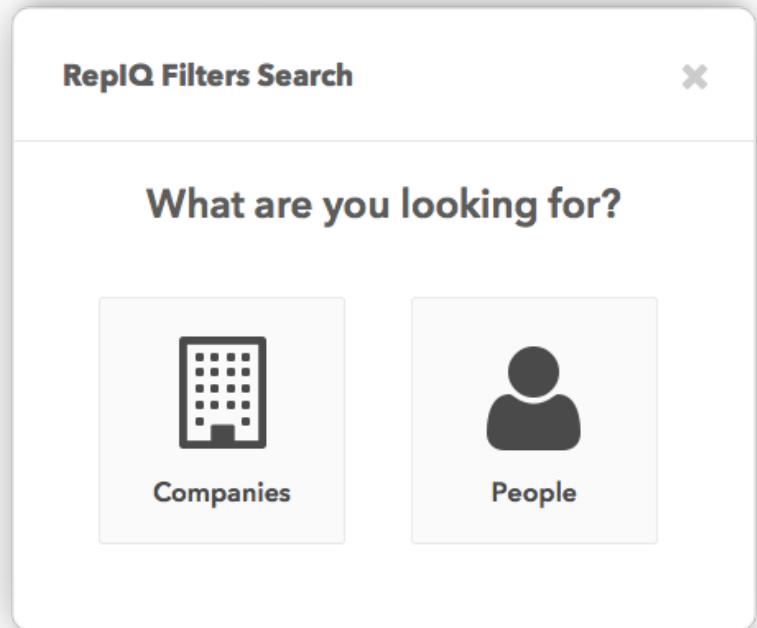
ICP Workflow

Remove Job Title Filter from Company Search

There has been feedback that the Job Title filter is confusing when performing a company search. Including a person-specific filter such as 'job title' within the Company Search workflow causes user confusion. Reinforcing the idea of the fork in the road workflow by directing the user in one direction or another, the user will know specifically whether they are looking for a person or a company. If a user discovers a company, it also gives them access to contacts instead of restricting to certain job titles. With the possibility of obscure job titles, this allows the user to still reach out to the matching company even if they don't have the job title that exactly matches the criteria.
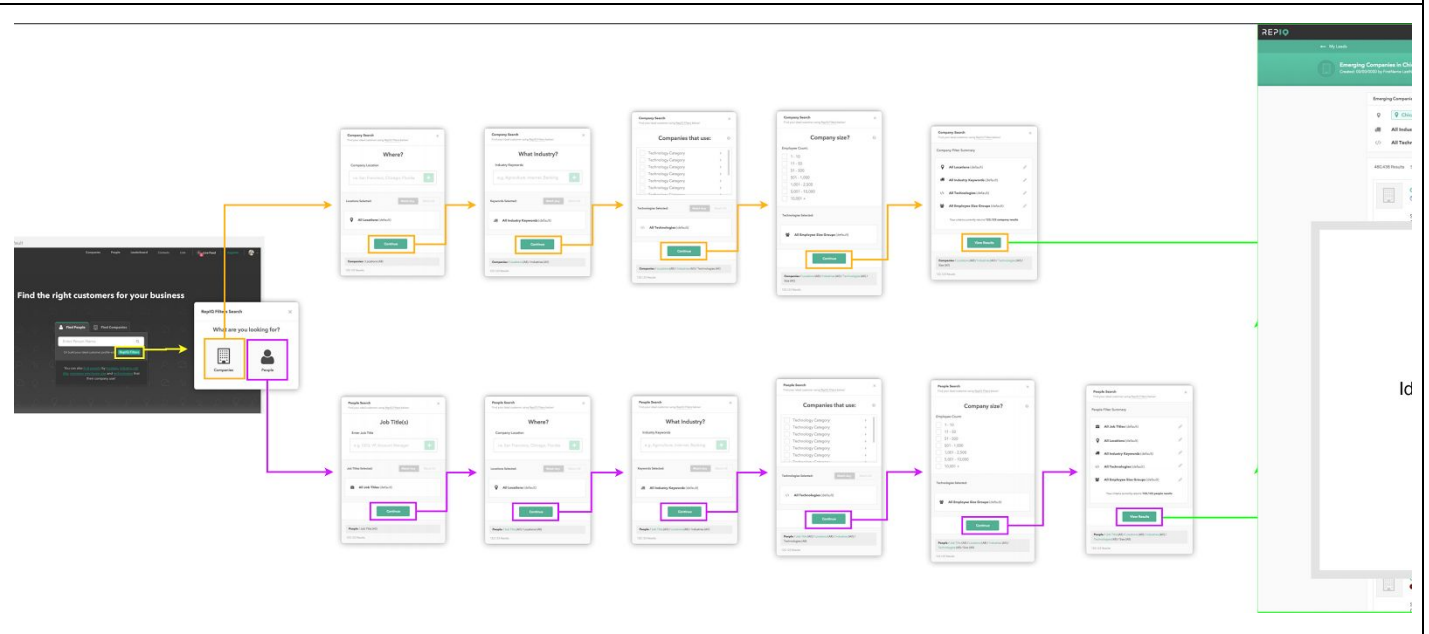
ICP Workflow
RepIQ Filters Button → Companies or People?

Companies → Location → Industry → Technologies → Size → Summary → Results
People → Job Title → Location → Industry → Technologies → Size → Summary → Results

Fig 3.1 below shows the process for the user to get to the ICP Results page.

Design Tweaks

Form Labels & Placeholders

To prevent a chance of confusion, we should add appropriate labels and placeholders to the workflow.

Employee Count Filter

Add "employee count" to the Company Size filter. Someone could confuse what the numbers represent as it currently displays, so just covering our bases here. See **Fig 4.1**

Filter Summary

For a cleaner design and less text for the user to read, represent the edit buttons with iconography (with supplemental tooltip for accessibility). See **Fig 4.2**

Employee Size Icon

Update the Employee Size icon to the "users" icon. The current icon is the alternative to the currently used company icon, so this helps differentiate the two.
http://fontawesome.io/icon/users/
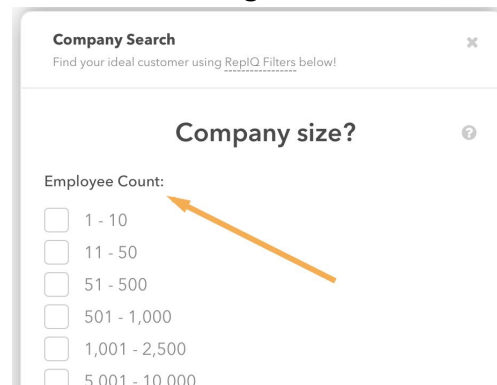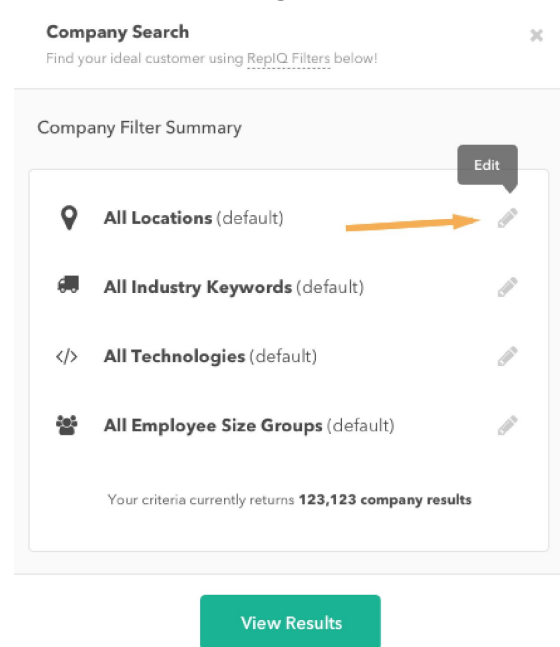
See **Fig 4.3**

Fig 4.1

Company Search
Find your ideal customer using RepIQ Filters below!

Company size?

Employee Count:
- [ ] 1 - 10
- [ ] 11 - 50
- [ ] 51 - 500
- [ ] 501 - 1,000
- [ ] 1,001 - 2,500
- [ ] 5.001 - 10.000

Fig 4.2

Company Search
Find your ideal customer using RepIQ Filters below!

Company Filter Summary

Edit

All Locations (default)

All Industry Keywords (default)

All Technologies (default)

All Employee Size Groups (default)

Your criteria currently returns **123,123 company results**

View Results

Fig 4.3

- [ ] 5,001 - 10,000
- [ ] 10,001 +

Company Sizes Selected:

All Employee Size Groups (default)