



# **BASF SalesX**

## Heuristic & Competitive Review

DRAFT January 2021

 **BASF**  
We create chemistry

# Seven Characteristics of Portals

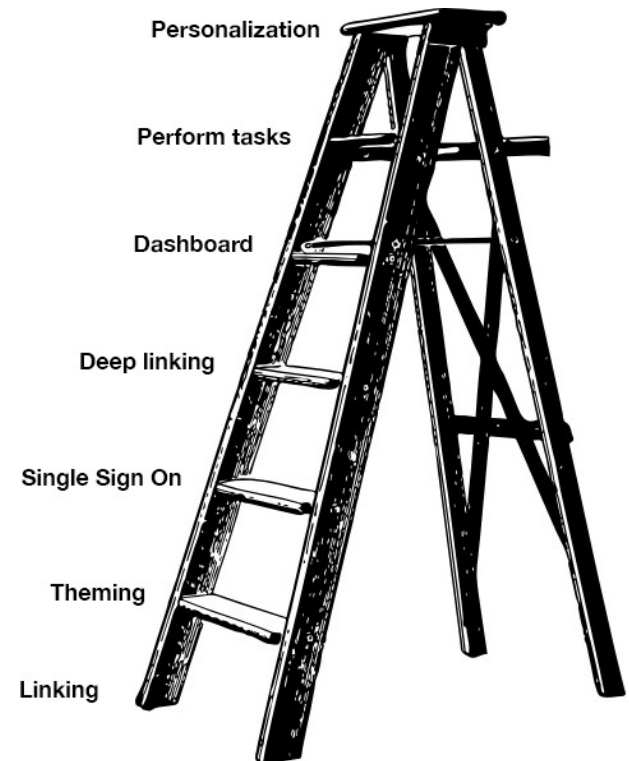
The seven characteristics of portals

**Personal Portals:** The portal as hub, providing links to other services like information or systems that users rely on for task completion.

**Corporate Portals:** An articulated personalized experience nestled within a flexible design system that creates a seamless experience along with other design resources and concise information architecture.

**Portals & Micro Services:** Providing convenient services like SSO to link users to other services within the portal will allow users the freedom to access their data quickly and efficiently. Don't make me think.

**Deep linking:** if Single Sign On (SSO) is in place users can be guided to specific modules within the portal, instead of arriving on a general dashboard thereby re-engaging with their workflow(s) immediately.



# Seven Characteristics of Portals

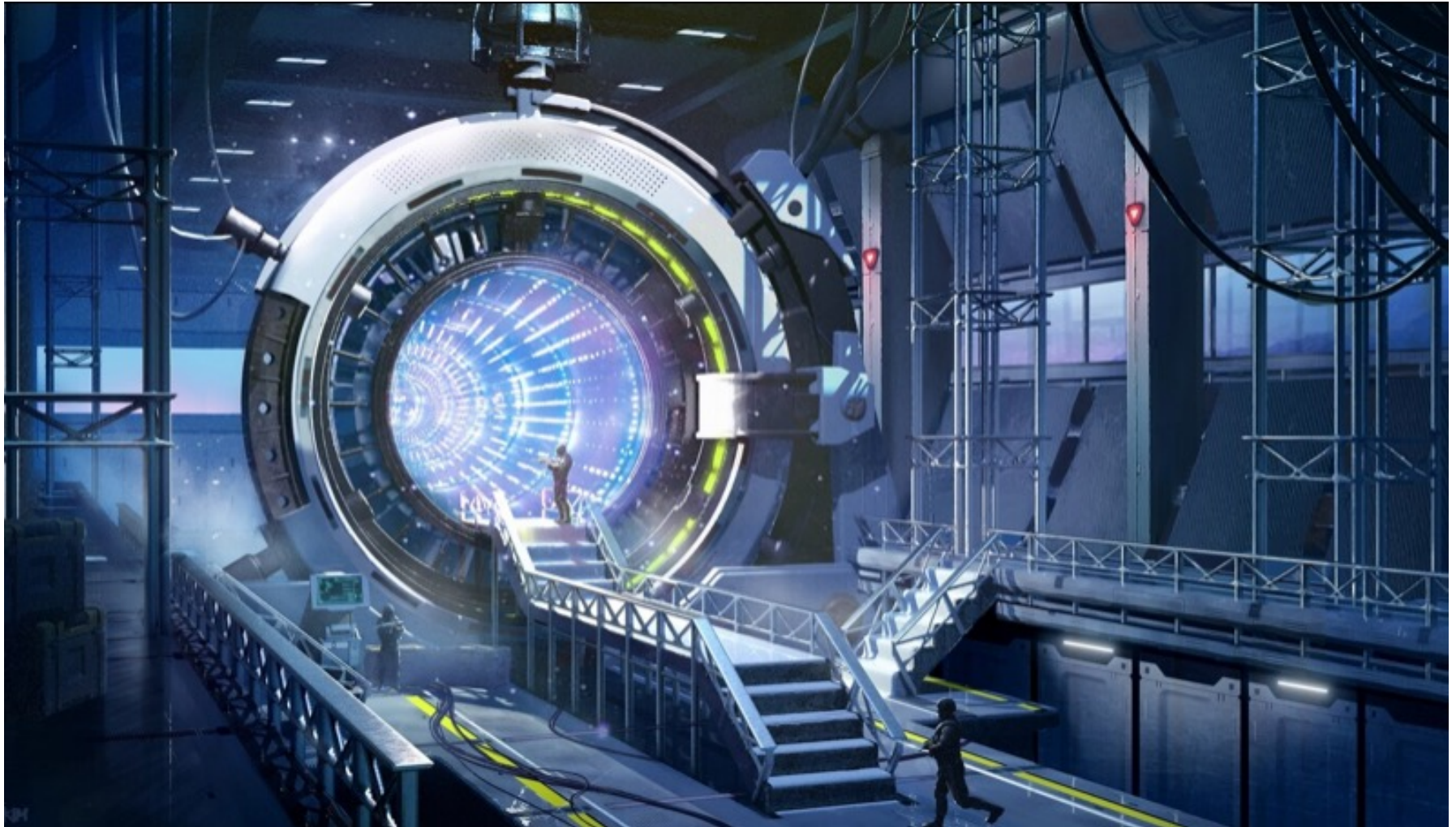
The seven characteristics of portals cont.

**Dashboard:** the next level of integration is aggregating crucial data points from all modules within the portal to provide a 'snapshot' of what tasks need to be completed next.

**Perform tasks:** one step further is allowing the user to perform tasks within other systems through the portal. If users can read and write within the portal, they should also be allowed to perform tasks without accessing the backend services.

**Personalization:** if you know exactly what your users need, you can offer them the right modules at the right time. This greatly enhances their overall portal experience and task completion.

# Not That Kind of Portal



# What are Portals made of anyway?

## The Eight Cs of Portal Design

### Content

Stuff that is organized for access & assimilation.

### Channels

How people interact with the portal.

### Correlation

Sifting through content to see what is useful.

### Customization

Adapting the portal to meet individual needs.

### Connectivity

How the portal gains access to the content.

### Context

That which surrounds and gives meaning to the content.

### Collaboration

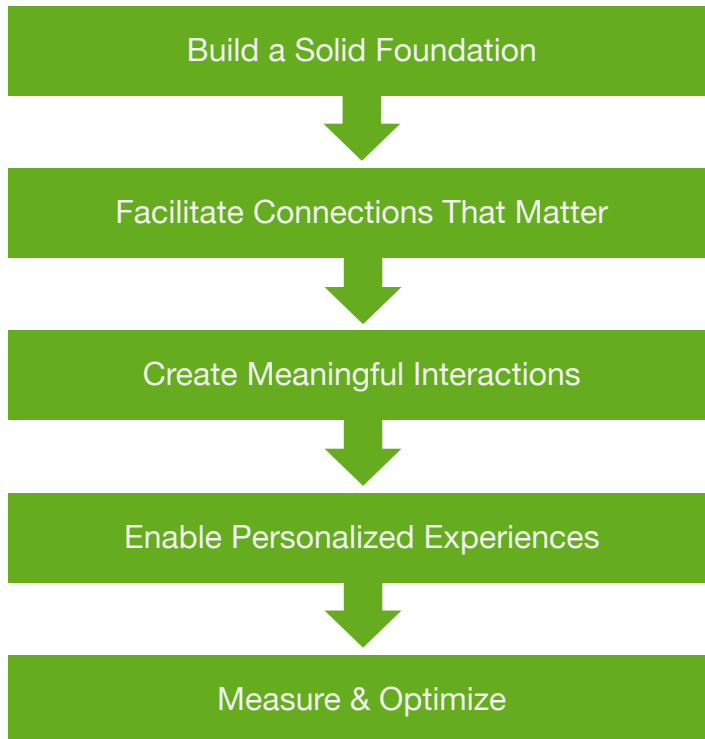
How the portal helps people interact with people.

### Communities

Associations of people with common needs.

# Foundational Principals

A solid foundation for the best-in-class portal CX



- Portal hygiene and human factors - usability, accessibility, speed/performance, maintenance, etc.
- Expand and improve the ways in which to connect to different audiences together thereby allowing Sales X to extend its reach.
- Expand and improve the ways to connect educational resources, sales programs, tools and resources together for all users to increase customer/user satisfaction.
- Targeted content and experiences to increase engagement and CRM opportunities.
- Gain a deeper knowledge of portal behavior and usage.

# Heuristic Analysis Categories

Categories used to Evaluate the Sales X Portal

## Visibility of portal status

The sense of control can be evoked by providing information about the system status

## Match between portal & real world

Users presume how the system could work based on their experience with other systems that are similar.

## User control & freedom

The portal should have a clearly marked exit mechanism, that provides users with an easy way to reset.

## Consistency of language & labels

A comprehensible portal should never confuse users by using different words, visuals, or actions for the same concepts.

## Error prevention

Mistakes are often caused by a user's incorrect mental model of how a portal works.

## Recognition rather than recall

Recognition is what happens when users easily recognize an object that they're familiar with. It is a very shallow form of retrieval from memory and it doesn't require any work.

## Flexibility & efficiency of use

A good user interface should offer the same set of functionality to both inexperienced and experienced users.

## Aesthetic & minimalist design

Minimalism has applications in art, music, and literature. It helps users to quickly access important information and come to the result quickly

## Help users with errors

To prevent user frustrations, we should put as much effort into designing error experiences as we do the rest of the portal CX.

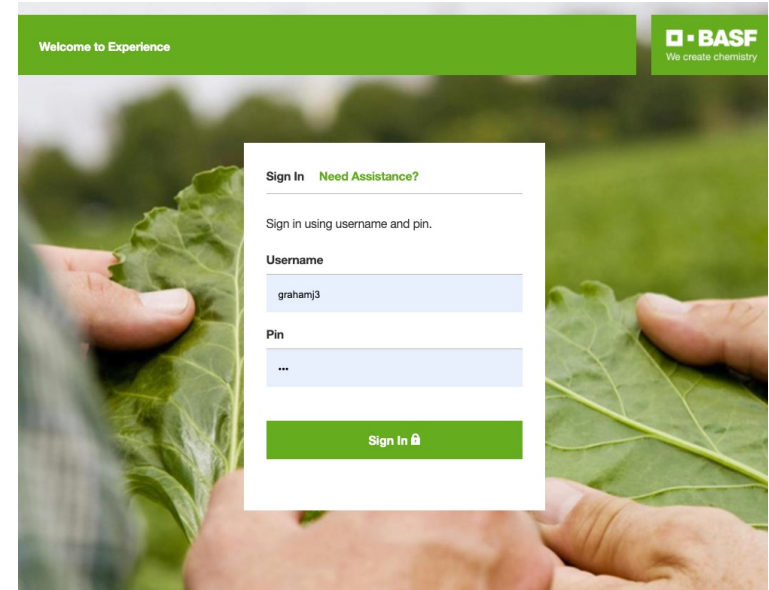
## Help & documentation

Documentation & help should be well structured, written in a human language, and minimalist. The goal is to keep users moving forward with task completion.

# Heuristic Evaluation Executive Summary

## Recommendations

- Gain a deeper knowledge of portal behavior and usage. Continue to ideate upon information architecture to meet user needs more succinctly.
- Implement SSO to secure and personalize the portal experience across modules and external systems.
- Recommend targeting content and experiences to increase engagement, portal use, and TBD opportunities.
- Expand and improve ways to connect programs, tools and resources together within the portal to increase customer/user satisfaction.
- Review portal hygiene and human factors performance & maintenance.
- Conduct a WCAG 2.1 AA Accessibility Audit.
- Consider utilizing 3<sup>rd</sup> party plugins like ag-Grid or similar, to provide a more flexible and personalized data management experience.
- Rely on proven UX/UI/CX methods and conventions instead of trying to reinvent the wheel. It's not working.
- Expand the existing design system to include more common interface interactions and standardize these throughout the portal modules for a consistent CX.
- Create and integrate a course module into Sales X along with a certification program.



# Heuristic Evaluation

## Login & Authentication

The screenshot shows the BASF login interface. At the top, there is a green header with the text "Welcome to Experience" on the left and the BASF logo "BASF We create chemistry" on the right. The main content area features a background image of hands holding a green leaf. Two white login forms are overlaid on this background. The first form, titled "Sign In Need Assistance?", prompts the user to "Sign in using username and pin." It contains a "Username" input field with a placeholder "Username" and a dropdown arrow, and a "Pin" input field with a placeholder "Pin". Below these fields is a green "Sign In" button with a lock icon. The second form, also titled "Sign In Need Assistance?", prompts the user to "Please enter the security code sent to your BASF email account." It contains a "Security Code" input field with a placeholder "Security Code" and a dropdown arrow. Below this field is another green "Sign In" button with a lock icon.

The esoteric login mechanism consisting of both, pin and security code input fields does not conform with best-in-class authentication. It is less secure pin and security codes don't change dynamically.

In addition, the use of the lock iconography on the 'Sign In' button is wrong. The button should be an unlocked icon, as the user is logging in and UNLOCKING access, not locking Sales X.

# Heuristic Evaluation

The safer alternative & convenient: Two-factored authentication



Two-factor authentication system is recommended for multiple services to increase security. After you login with your username and password, The system confirms your identity using one of the following methods:

1. Sending a push notification to the Mobile app on your smartphone that you acknowledge to confirm your identity.
2. Requiring a passcode: that you requested via the Authentication prompt, that you generated on your Duo Mobile app.
3. Or that is displayed on a hardware token.

# Heuristic Evaluation

Where's the Dashboard?

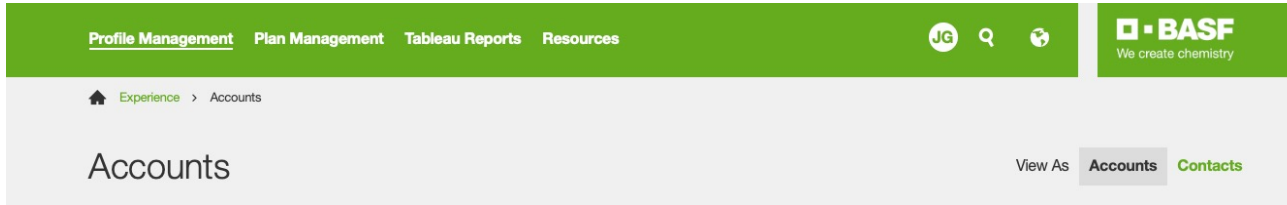
The screenshot shows the BASF Profile Management interface. The top navigation bar includes 'Profile Management', 'Plan Management', 'Tableau Reports', and 'Resources'. The user is logged in as 'JG'. The main content area is titled 'Accounts' and has tabs for 'View As', 'Accounts', and 'Contacts'. Below the tabs are filters for 'Recent', 'Bookmarks', and 'A-Z'. The main table lists accounts with columns for 'Account', 'Physical Address', and 'Primary Contact'. Each row includes a search box, account details, physical address, primary contact name and role, and a 'Goto Section' link.

Account	Physical Address	Primary Contact	
<input type="text" value="Search"/> <b>CHS Inc - Quinter</b> Quinter, KS - Operating Unit BASF ID 414388	<input type="text" value="Search"/> 7225 County Road Z Quinter, KS 67752 <a href="#">Navigate to</a>	<input type="text" value="Search"/> <b>Hargitt, Brett</b> Associate	<a href="#">Goto Section</a>
<b>Aeschliman Aero</b> Tribune, KS - Operating Unit BASF ID 301959	2433 Road 13 Tribune, KS 67879 <a href="#">Navigate to</a>	<b>Aeschilman, Arlie Wayne</b> Owner	<a href="#">Goto Section</a>
<b>Almena Agri Services Inc</b> Almena, KS - Operating Unit BASF ID 232403	7932 Road 10 E Almena, KS 67622 <a href="#">Navigate to</a>	<b>2updated, 2updated</b> Associate	<a href="#">Goto Section</a>
<b>Nutrien AG Solutions</b> La Crosse, KS - Outlet BASF ID 6373913	2468 Avenue C La Crosse, KS 67548 <a href="#">Navigate to</a>		<a href="#">Goto Section</a>
<b>Mid-State Farmers Co-Op Inc</b> Otis, KS - Operating Unit BASF ID 278857	106 S 3rd St Otis, KS 67565 <a href="#">Navigate to</a>		<a href="#">Goto Section</a>
<b>CHS Inc - Tribune</b> Tribune, KS - Outlet BASF ID 500244	1607 Hwy 27 Tribune, KS 67879 <a href="#">Navigate to</a>	<b>David, Smith</b> Associate	<a href="#">Goto Section</a>

As a user Grahamj3, I land on the Profile Management screen. Why? Wouldn't it be more advantageous for Sales X to take Grahamj3 to his personalized dashboard and present him with an overview of Newsroom features, modules, tasks that he needs access to?

# Heuristic Evaluation

Global Navigation: Bucking UX trends to the detriment of users



Currently, the global navigation seems a bit of a mixed proposition. By placing user preferences and utilities together, it muddies wayfinding and calls into question established UX best practices.



For example, Corteva and MyBayer respectively do a much better job of calling out the breath and scope of the available categories and both do a great job of segmenting user and account preferences.



Going forward, Sales X should consider similar such IA and use of nomenclature.



# Heuristic Evaluation

Custom tables versus 3<sup>rd</sup> party solution specific to meet user's needs

**Account** ▾

Search

- **CHS Inc - Quinter**  
 Quinter, KS - Operating Unit  
 BASF ID 414388
- **Aeschliman Aero**  
 Tribune, KS - Operating Unit  
 BASF ID 301959
- **Almena Agri Services Inc**  
 Almena, KS - Operating Unit  
 BASF ID 232403

**Physical Address** ▾

Search

- 7225 County Road Z  
 Quinter, KS 67752  
Navigate to
- 2433 Road 13  
 Tribune, KS 67879  
Navigate to
- 7932 Road 10 E  
 Almena, KS 67622  
Navigate to

**Primary Contact**

Overview  
 Contacts  
 Hierarchy  
 Marketing Attributes  
 Activity  
 Sales Insights  
 BR Incentive Plan  
 Claim

Goto Section
Goto Section
Goto Section

The current in-house solution does not meet user needs fully and seems rather obtuse and difficult to use. Links and actions are scattered about and the awkward labels do not immediately make it clear how to use the grid.

For example, why is there an overlay used to show the “Goto section?” It is the wrong UI behavior and muddies wayfinding.

In addition, the current grid is flat and does not facilitate the type of personalization or UI flexibility most users have come to expect.

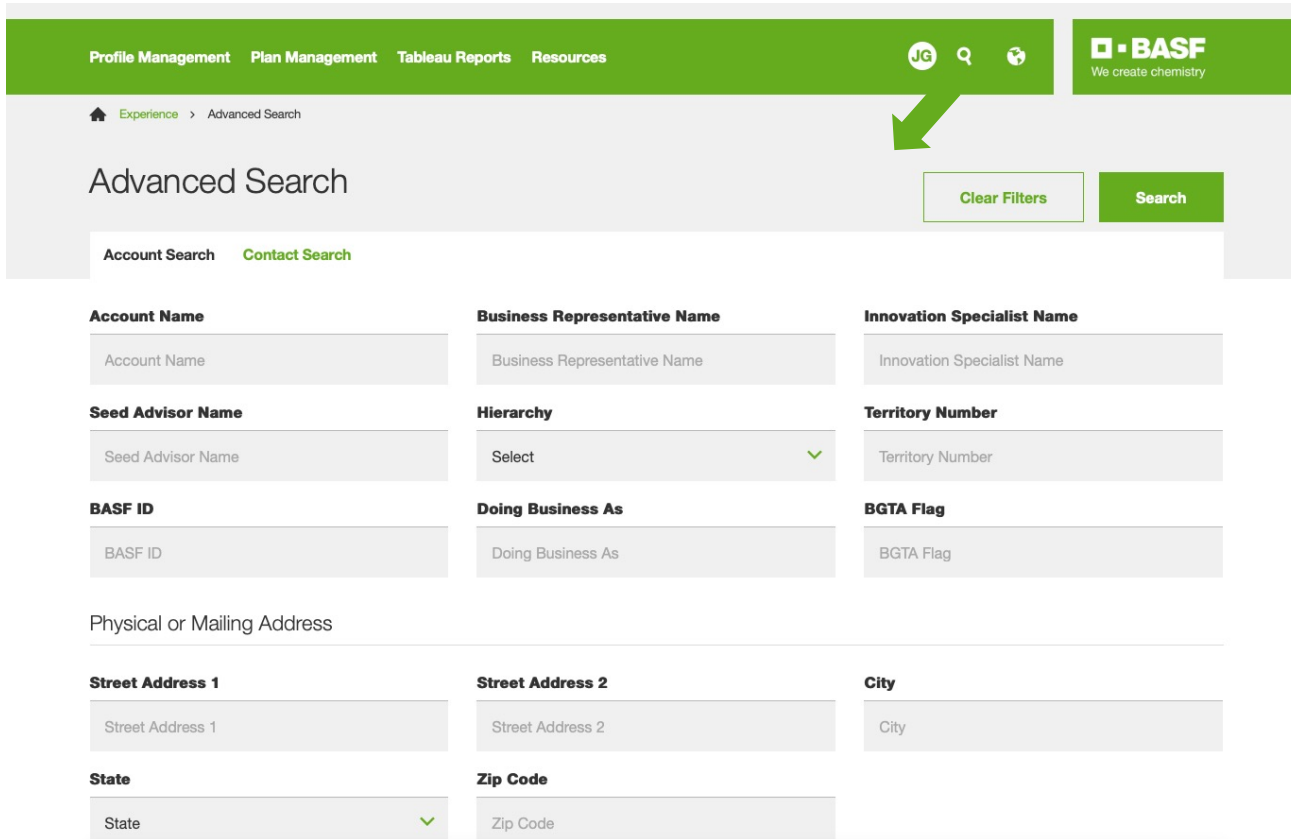
By comparison, ag-Grids provides the flexibility and best-in-class grids that facilitate, rather than hinder task completion and data visualization.

Participant							Game of Choice	Performance >
Name	Language	Country	Game Name	Bank Balance	Rating			
<input type="checkbox"/> Tony Smith	English	Ireland	Chess	\$2,397	★★			
<input type="checkbox"/> Andrew Connell	Swedish	Sweden	Bul	\$12,749	★★★			
<input type="checkbox"/> Kevin Flanagan	Spanish	Uruguay	Rithmomachy	\$95,078				
<input type="checkbox"/> Bricker McGee	French	France	Kalah	\$65,506				
<input type="checkbox"/> Dimple Unalkat	Portuguese	Portugal	Game of the Generals	\$85,310	★★			
<input type="checkbox"/> Gil Lopes	Spanish	Colombia	Hare and Hounds	\$75,701	★★			
<input type="checkbox"/> Sophie Beckha...	English	Ireland	Sugoroku	\$66,706				
<input type="checkbox"/> Isabelle Black	French	France	Nine Men's Morris	\$15,749	★★★			
<input type="checkbox"/> Emily Braxton	Maltese	Malta	Blockade	\$4,057	★★★★★			

Rows: 100

# Heuristic Evaluation

Site search or account search? Prioritize features and locate them appropriately



The screenshot shows the BASF Advanced Search interface. The top navigation bar includes links for Profile Management, Plan Management, Tableau Reports, and Resources. The search bar contains a search icon, a user icon (JG), and a world icon. The main content area is titled "Advanced Search" and includes tabs for Account Search and Contact Search. Below the tabs are several search filters arranged in a grid:

Account Name	Business Representative Name	Innovation Specialist Name
Account Name	Business Representative Name	Innovation Specialist Name
Seed Advisor Name	Hierarchy	Territory Number
Seed Advisor Name	Select	Territory Number
BASF ID	Doing Business As	BGTA Flag
BASF ID	Doing Business As	BGTA Flag

Physical or Mailing Address

Street Address 1	Street Address 2	City
Street Address 1	Street Address 2	City
State	Zip Code	
State	Zip Code	

Adding to the disarray within the global navigation are unexpected utility behaviors. For example, the search icon triggers the advance search page, instead of opening a search box. Also, the user icon (initials) and world icons are non-operational.

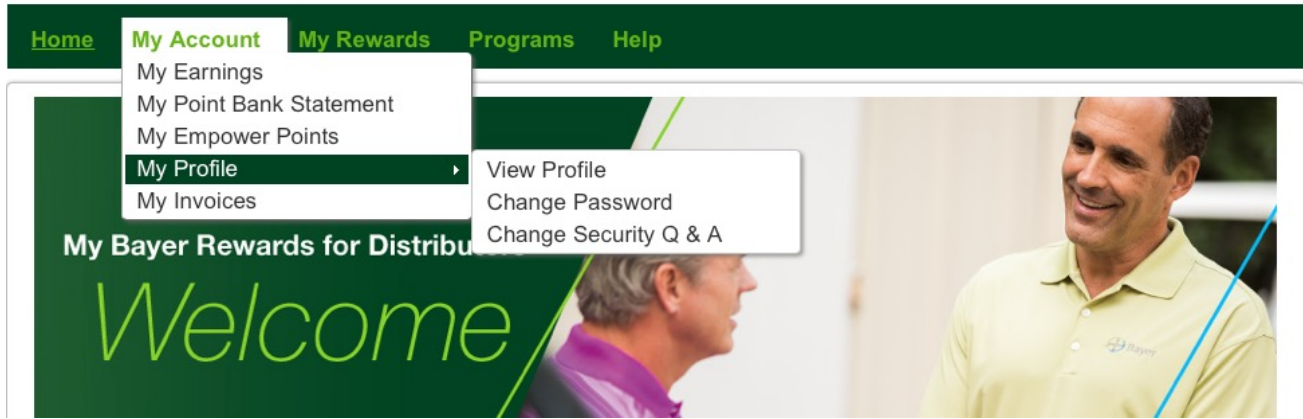
# Heuristic Evaluation

Where features live among your competitor's portals



Note the system action when the user clicks on the search icon in the global navigation of the Corteva global navigation.

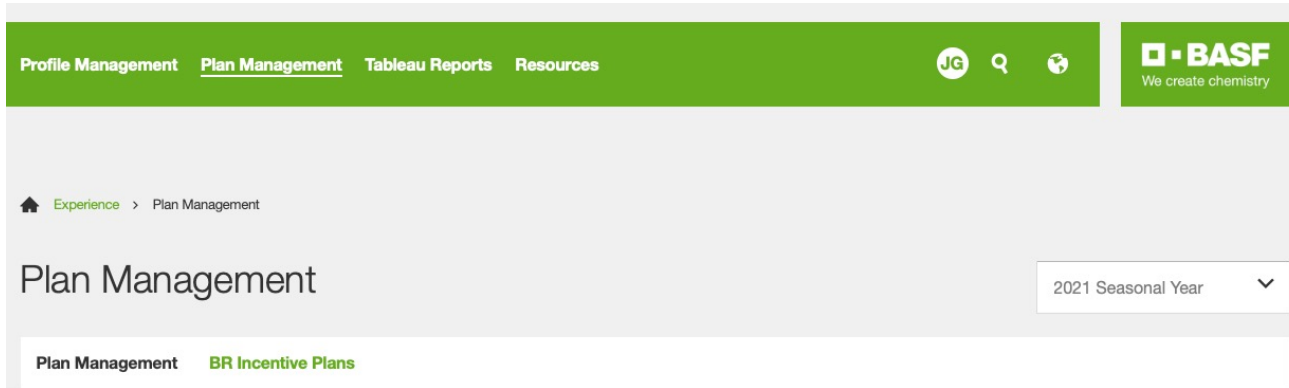
## MyBAYERewards



Also, note how far down on the IA hierarchy 'View Profile' is on the MyBayer portal. Following established UX/UI best practices and navigational groupings will help Sales X meet users needs and expectations.

# Heuristic Evaluation

Plan Management: Give me more feedback



Pact Plan

↓ Download Pact Plan

## SWOT Analysis

Identify the Strengths, Weaknesses, Opportunities & Threats facing your business this year.

✓ Complete



## Market Trends

Identify trends you are you seeing in the market this year.

✓ Complete



## Risks & Contingencies

Identify areas you're targeting for overall improvement and safety of your team this year.

In-Progress



## Sales Goals

Set and track sales goals for accounts and products.



More information regarding Plan Management would go along way in establishing what these modules are for. While most MBAs know what a SWOT analysis is, what remains unclear is context of how these modules benefit a user's workflow?

Also, if this page is to serve as a progress indicator, we suggest switching to a table format to better convey what remains to be done, what's required, and respective module deadlines.

Also consider providing more useful tools tips. Maybe annotated module descriptions?

# Heuristic Evaluation

Plan Management: Why is this not on the dashboard?

The screenshot shows a dashboard titled "Plan Management" for the "2021 Seasonal Year". It features a breadcrumb trail "Plan Management > BR Incentive Plans" and a "Plans" tab. A prominent green button labeled "Add Account Plan" is visible. Below this is a section for "Accrual Exposure Summary" which contains a large, empty circular chart. At the bottom, there is a table with columns for "Overall Exposure", "CRs", "Brand Support", "Account Support", "Brand Support & Account Support Only", and "Account Plans Overall". A legend at the bottom left identifies categories like "Brand Support - CPP", "Brand Support - ST", "Account Support", and "CRs". A status legend at the bottom right includes "Draft", "Submitted", "Approved", and "Rejected".

There are numerous graphs and tables within Plan Management and other modules that should be aggregated to a dashboard providing an overview to users when they return or login for the first time. In addition to providing a valuable snapshot a dashboard is also one large dynamic CTA, allowing users to dive deeper into new or saved workflows.

# Heuristic Evaluation

Table complexity: I want to customize my data view

Plan Details

Show Filters

Account	Enrollment	Status	Updated	2020			2021			Est Incentives 0	
				EDI	EDI	POS	EDI	POS	EDI	POS	
<b>CHS Inc</b> Quinter, KS - Outlet BASF ID 7227950	Account Support	APPROVED	11/17/2020	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	Brand Support	DRAFT	11/12/2020	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>CHS Inc</b> Bristol, CO - Outlet BASF ID 518130	Brand Support	DRAFT	11/13/2020	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
<b>CHS Inc</b> Wakeeney, KS - Operating Unit BASF ID 298586	Competitive Response	SUBMITTED	12/08/2020	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
> <b>CHS Inc - Quinter</b> Quinter, KS - Operating Unit BASF ID 414388	Account Support	SUBMITTED	12/03/2020	\$705.86K	\$0	\$0	\$0	\$0	\$0	\$0	
	Brand Support	DRAFT	12/08/2020	\$297.27K	\$0	\$0	\$0	\$0	\$0	\$0	
	Competitive Response	SUBMITTED	12/03/2020	\$318.55K	\$0	\$0	\$0	\$0	\$0	\$0	
> <b>Cma Distributors Inc</b> Oberlin, KS - Operating Unit BASF ID 344698	Account Support	DRAFT	12/17/2020	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
> <b>Golden Belt Cooperative Assn</b> Ellis, KS - Operating Unit BASF ID 295504	Account Support	SUBMITTED	12/18/2020	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
> <b>Mid-State Farmers Co-Op Inc</b> Otis, KS - Operating Unit BASF ID 278857	Account Support	DRAFT	11/12/2020	\$288.19K	\$9.70K	\$0	\$0	\$0	\$0	\$0	
	Brand Support	DRAFT	11/12/2020	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
	Competitive Response	DRAFT	11/12/2020	\$219.14K	\$0	\$0	\$0	\$0	\$0	\$0	

10 per page ▼

The flat and rigid table does little to provide the type of personalized data visualization users have come to expect. As previously noted, we recommend looking at 3<sup>rd</sup> party solutions like ag-Grid and others.

# Heuristic Evaluation

Plan Management: Make downloads contextual

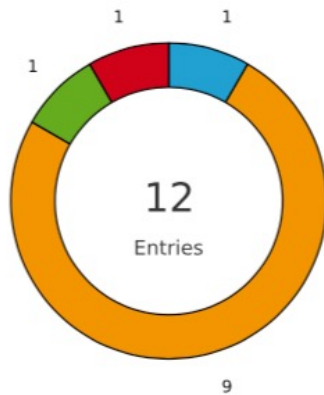
## 2021 Territory Business Plan

JAMES GRAHAM



### SWOT Analysis

● COMPLETE



#### Strength

Some strength

#### Weakness

test 1

test 2

test 3

test 4

test 6

Downloads, like this completed territory business plan (or work in progress), would be ideal candidates for the portal dashboard page. Users could simply login (SSO), download the required materials, and be on their way.

# Heuristic Evaluation

## Plan Management: Sales Goals

- SWOT Analysis
- Market Trends
- Risks & Contingencies
- Sales Goals
- Innovation Specialist Pact Plan
- Seed Advisor Pact Plan

Season Total Sales YTD Sales

Add a Sales Goal

### 2021 Product Sales

**\$130.70K**  
2021 Sales

**\$9.410M**  
2020 Sales

Show sales table | Territory Budget \$90.00K | Goal \$12.70K  
Edit

Herbicide	Fungicide	Insecticide	Seed Treatment
2021 Planned <b>\$130.70K</b>	2021 Planned <b>\$0</b>	2021 Planned <b>\$0</b>	2021 Planned <b>\$0</b>
2020 Sales <b>\$9.080M</b>	2020 Sales <b>\$71.02K</b>	2020 Sales <b>\$2.85K</b>	2020 Sales <b>\$255.48K</b>

Accounts Products

Barker Farm Services Inc  
Goodland, KS - Operating Unit  
BASF ID 415612

\$12.70K



Mark Section as Complete

The data visualization piece for Seasonal Total Sales initially seems good. However, it is not immediately clear (or possible) to adjust projections and project different scenarios. This, in effect means that users are limited to how much flexibility they have in working with statistics.

# Heuristic Evaluation

## Plan Management: Tableau Reports

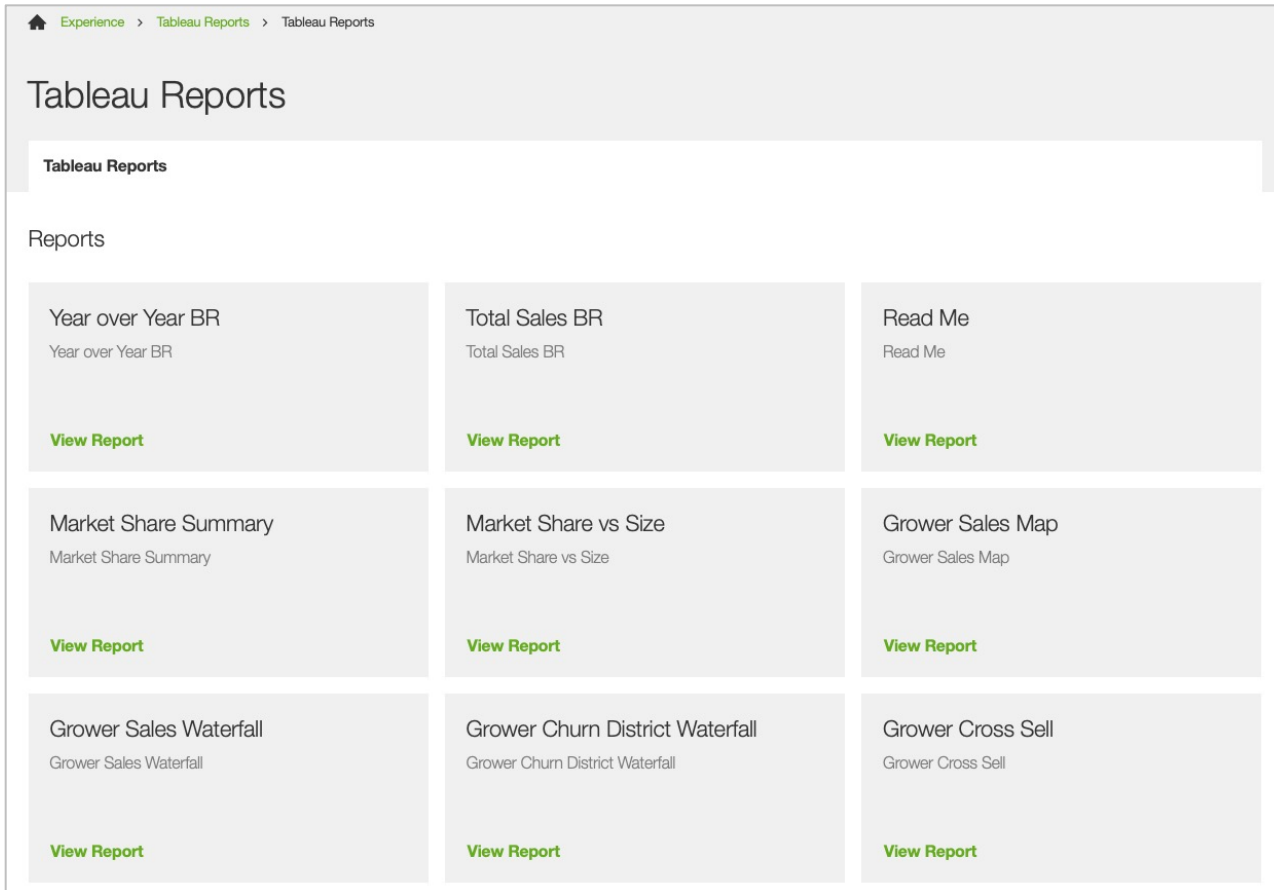
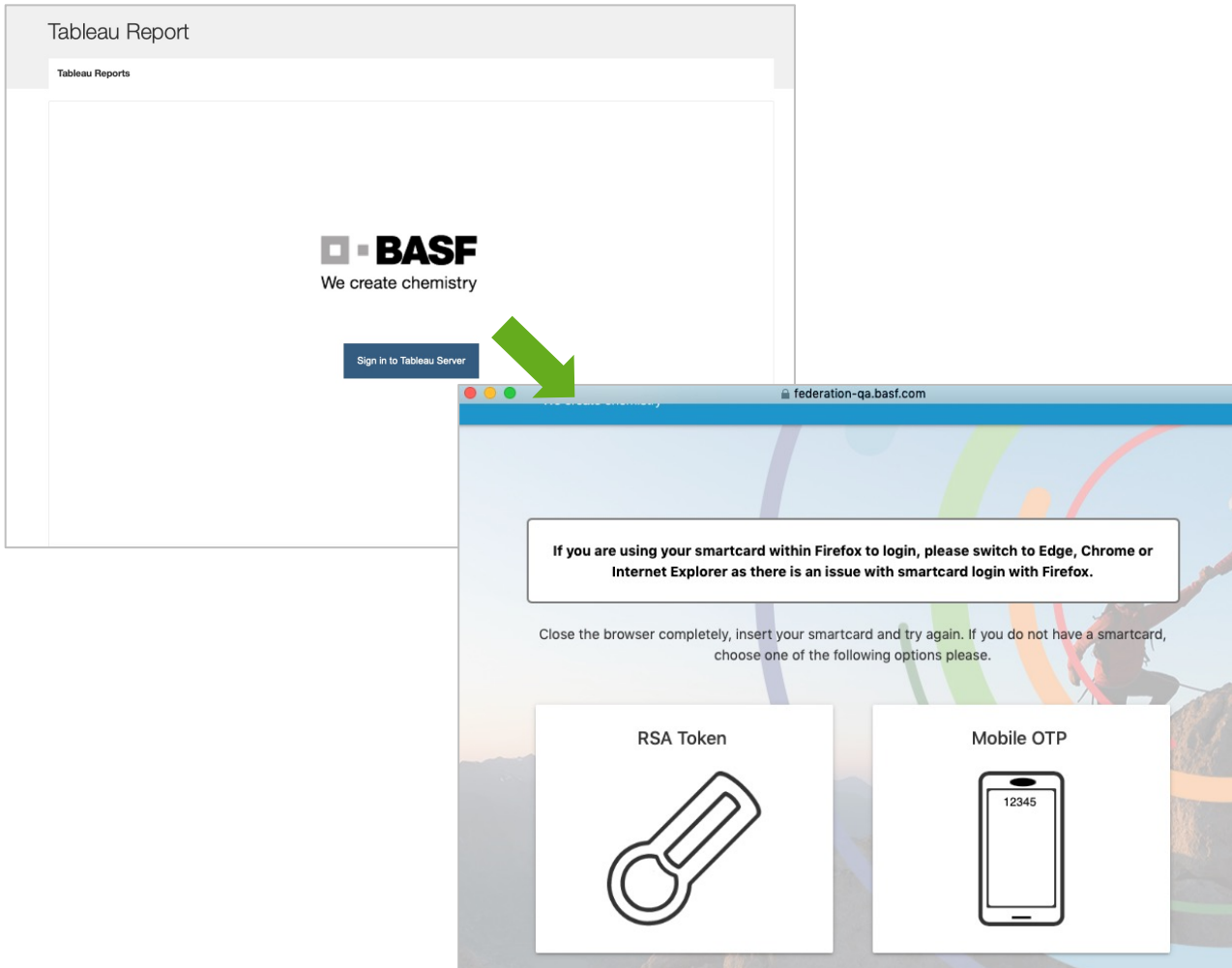


Tableau reports were sadly inaccessible with the provided credentials. However, we do suggest utilizing a table format for the Tableau Reports landing page allowing users to scan reports by most recent, subject, author, file size, and keywords.

The illustrated box grid matrix does a poor job of how highlighting the content and forces users to have to dig for data.

# Heuristic Evaluation

## Tableau Reports: Behind lock & key

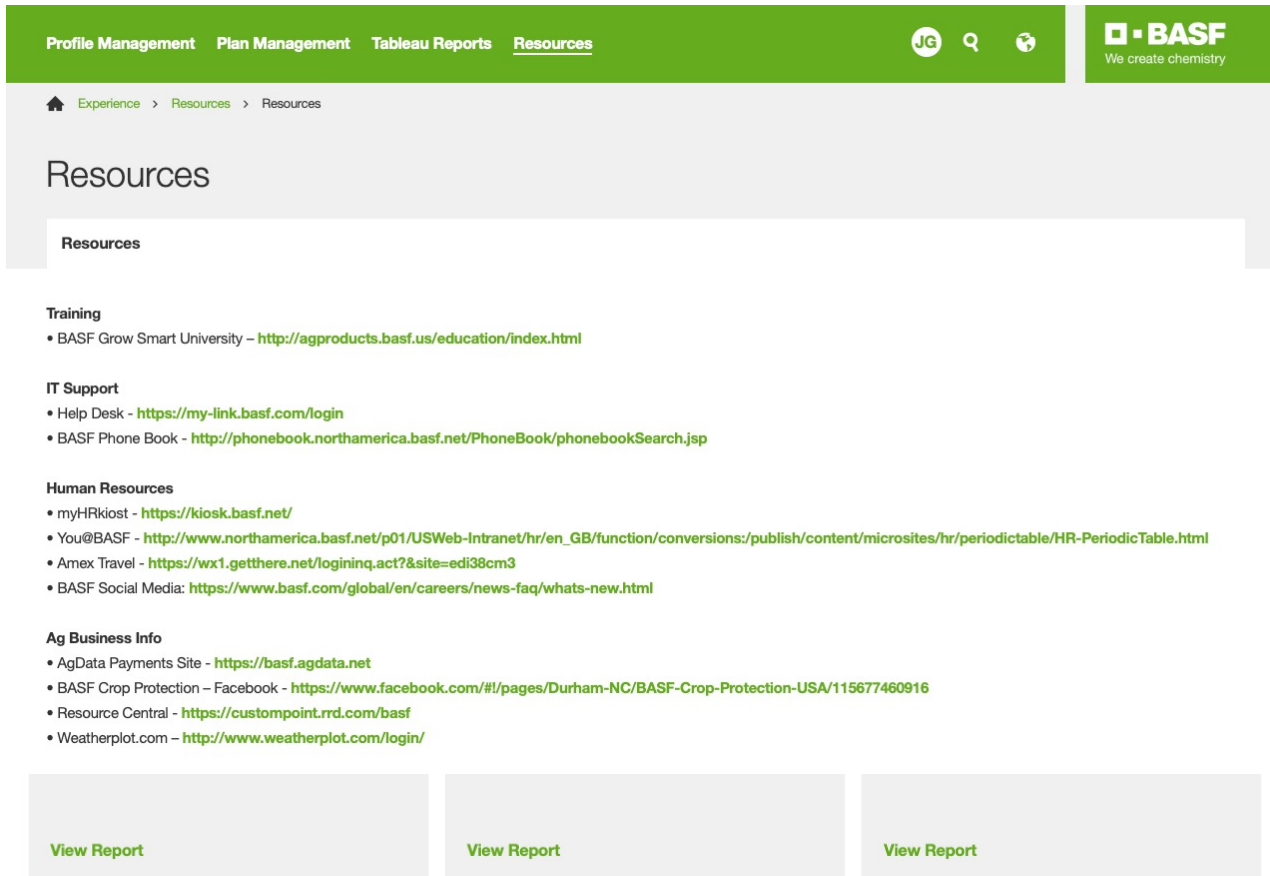


Again, SSO and providing all out access to areas like like Tableau Reports should be seamless.

If users do not have access to items (like Tableau reports) these modules should be hidden until they do. This would minimize cognitive dissonance and distrust.

# Heuristic Evaluation

Resources: Seed Advisor Pact Plan



A survey of the links revealed that over 90% of the links on the page do not work.

Furthermore, why show the URL? There is simply no need to show the entire URL address. A simple link should be sufficient, along with better descriptions.

Furthermore, new iconography should accompany each link that opens a new page or takes users out of the portal.






# Heuristic Evaluation

Contacts: Adding a contact process

[Overview](#) [Contacts](#) [Hierarchy](#) [Marketing Attributes](#) [Activity](#) [Sales Insights](#) [BR Incentive Plan](#)

Show archived contacts

[+ Add Contact](#)

Contact	Preferred Phone	Preferred Email	
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	
 <b>Aeschilman, Arie Wayne</b> <span>PRIMARY</span> Owner	316-376-2195	email@testest.com	<a href="#">Add Activity</a>
 <b>Carretero, Marcos</b> Associate		test@test.com	<a href="#">Add Activity</a>
 <b>Smith, Peter</b> Associate	555-555-5555	test@basf.com	<a href="#">Add Activity</a>
 <b>tester, test</b> Owner		test@test.com	<a href="#">Add Activity</a>
 <b>Testerrrr, Testttt</b> Associate		test@test.com	<a href="#">Add Activity</a>

As part of the evaluation, a few processes were tested to understand the UX components and intentions of the design.

In this instance, we added a contact to the rudimentary table.

# Heuristic Evaluation

## Contacts: Adding a contact process

Add a Contact for

**Aeschliman Aero**  
Tribune, KS - Operating Unit

1 of 3: Basic Information

**Last Name\***

Last Name

**First Name\***

First Name

**Role\***

Select

**Contact Title\***

Contact Title

**Is this contact also an influencer?\***

Yes  No

**First Name\***

First Name

**Role\***

Select

**Contact Title\***

Contact Title

**Is this contact also an influencer?\***

Yes  No

**Is this a primary contact for this account?\***

Yes  No

**Save & Continue** Cancel

2 of 3: Methods of Contact

3 of 3: Contact Preferences & Social

**Aeschliman Aero**  
Tribune, KS - Operating Unit

1 of 3: Basic Information

2 of 3: Methods of Contact

Please provide at least one method of contact, either an email address, a phone number or a physical/mailling address.

**Email** Phone Address

**Work Email**

ia\_email@host.com  Set as preferred email

**Personal Email**

ia\_email@host.com  Set as preferred email

**Save & Continue** Cancel

3 of 3: Contact Preferences & Social

Adding contact information utilizing a modal with accordion enabled content sections is not the best user-centric solution.

Instead, we recommend utilizing an ag-Grid table, which would allow users to create a new line (similarly to Excel) and fill in the necessary fields. This would also dramatically shorten the time spent on editing contacts, as users could simply double-click on a data point and edit them inline.

2 of 3: Methods of Contact

3 of 3: Contact Preferences & Social

Websites & Social Profiles

**Company Website**

ia. https://www.company.com

**LinkedIn**

in LinkedIn Profile

**Twitter**

Twitter Profile

**Facebook**

f Facebook Profile

**Save** Cancel

# Heuristic Evaluation

## Messaging and Alerts

The screenshot shows a contact management interface. At the top, there are navigation tabs: Overview, Contacts, Hierarchy, Marketing Attributes, Activity, Sales Insights, and BR Incentive Plan. Below the tabs, there is a checkbox for 'Show archived contacts' and a green '+ Add Contact' button. The main content is a table with three columns: Contact, Preferred Phone, and Preferred Email. Each row represents a contact with their name, role, phone number, and email address, along with an 'Add Activity' link. Below the table, there is a black success message bar that says 'Success'. At the bottom, there is a 'Personal Email' form with a text input field containing 'ie. email@host.com', a checkbox for 'Set as preferred email', and a red error message: 'A preferred method of contact is required'. There are two buttons at the bottom: 'Save & Continue' and 'Cancel'.

Contact	Preferred Phone	Preferred Email	
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	
<b>Aeschilman, Arlie Wayne</b> Owner	316-376-2195	email@testtest.com	<a href="#">Add Activity</a>
<b>Bob, Bill</b> <span>PRIMARY</span> Associate		email@host.com	<a href="#">Add Activity</a>
<b>Carretero, Marcos</b> Associate		test@test.com	<a href="#">Add Activity</a>
<b>Smith, Peter</b> Associate	555-555-5555	test@basf.com	<a href="#">Add Activity</a>
<b>tester, test</b> Owner		test@test.com	<a href="#">Add Activity</a>
<b>Testerrrr, Testttt</b> Associate		test@test.com	<a href="#">Add Activity</a>

**Success**

**Personal Email**

**Set as preferred email**

A preferred method of contact is required

**Save & Continue** **Cancel**

The successful task completion message that appears below the table upon successfully adding a users is too far down on the page hierarchy and nearly disappears below the fold at 1280x800.

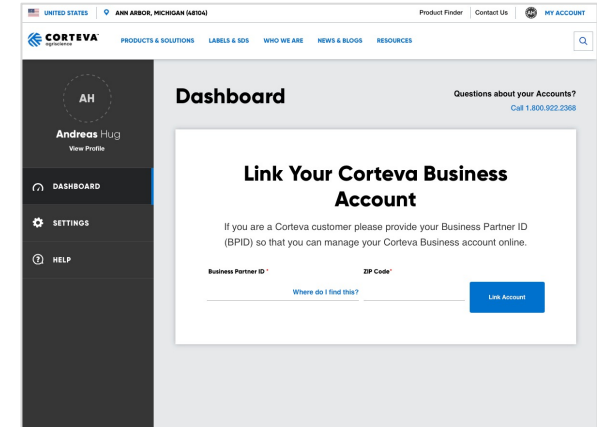
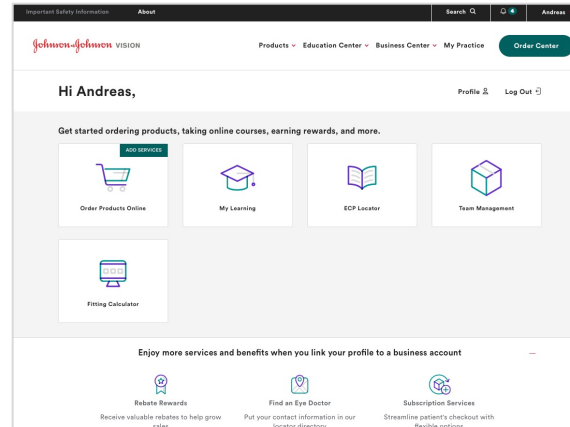
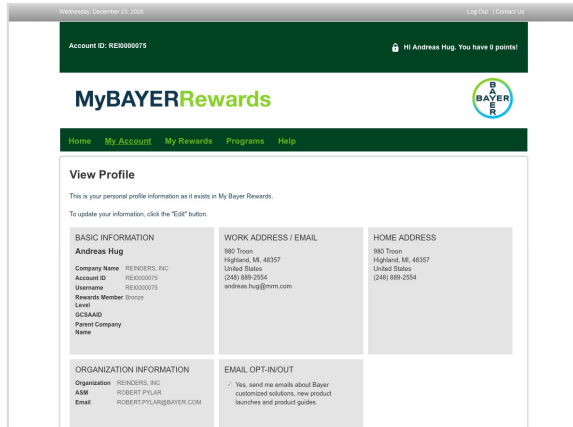
Here, again, it would be best to follow established best practices of providing task specific messaging immediately below the global footer but above the table in question.

Another issue is the input hint text for the Personal Email text field and others does not meet the basic color contrast accessibility requirements.

Finally, the red required text is too small to be noticed by most users and would be best visualized as an alert tool tip.

# Competitive & Landscape Analysis

Reviewing portal design from the inside out



## MyBayer Rewards Portal

Bayer is one of the world's major players in crop science. Today, Bayer's agro division boasts more than 35 research sites and 175 breeding sites globally. Bayer announced US\$60 billion plans to purchase Monsanto. That deal was approved in 2018 on the condition Bayer sells its seed and herbicide businesses to BASF.

## J&J Vision

Johnson & Johnson Vision is a subsidiary of Johnson & Johnson and its services include intraocular lenses, laser vision correction systems, phacoemulsification systems, viscoelastic, microkeratomes and related products used in cataract and refractive surgery.

## Corteva Agriscience

After their merger, DowDuPont pursued a separation into three independent, publicly traded companies: an agriculture, a materials science, and a specialty products company. The agriculture business now known as Corteva Agriscience, unites Dow and DuPont's seed and crop protection unit, with an approximate revenue of \$16 billion.

# Competitive & Landscape Analysis Summary

Analyzed the Sales X portal, two competitors, and one landscape portal, with a focus on the overall impact of their dashboards, information architecture, navigation strategies and standout modules and features.

## What We Found:

- All competitors offer a targeted dashboard consisting of account access, programs, & tools.
- Creating a portal account is verified through two-factored authentication.
- All competitors had similar utilities and global navigation schemas which provided a level of continuity.
- Successful portals all have a robust course or certification module in place.
- Simplify access & processes allowing users to edit / add / delete profile account information.
- Dedicated search capabilities for modules like invoice look-up increases findability and user satisfaction.
- In the case of MyBayer rewards program value proposition is explicit. Sales X needs to make a case for itself.
- All portals reviewed offer either FAQs, help, or other meaningful resources to facilitate self-services and keep users working.



# Competitive & Landscape Analysis Summary


How everyone stacks up.

	Corteva	J&J Vision	MyBayer	Sales X
User Preferences	•	•	•	•
Product Catalogs	•	•	•	
Rich Content	•	•		
eCommerce	•	•		
Site Search	•	•	•	
Tools for Users		•		•
Authentication	•	•	•	•
Product Support		•		•
Social Integration	•	•	•	
Community	•	•	•	
Help	•	•	•	
Courses		•		
Certifications	•	•		
Chat	•	•		

# Competitive Analysis Corteva Agriscience

## Login & Authentication

UNITED STATES | ANN ARBOR, MICHIGAN (48104) | Product Finder | Contact Us | LOG IN / SIGNUP

 PRODUCTS & SOLUTIONS | LABELS & SDS | WHO WE ARE | NEWS & BLOGS | RESOURCES

Signing up for access to the Corteva Agriscience portal was seamless and included features like the dynamic location finder and succinct instructions about how to set up an account.



Welcome to Corteva.us! Create an account to access your TruChoice program account information.

- If you are a current customer, after you create your account, you will be prompted to link your Business Partner ID #.
- If you already have created an account on Pioneer.com, your Corteva.us username and password will be the same as your Pioneer information.
- If you are a retailer, please visit [truchoiceonline.com](http://truchoiceonline.com) to access your TruChoice program information.
- Contact Technical Support at 1-800-858-7686 for assistance with login challenges, username/password issues or other technical difficulties.
- Contact TruChoice Support at 1-800-922-2368 for all other TruChoice account specific questions.

Email Address \*

Password \*

[Forgot your password?](#)

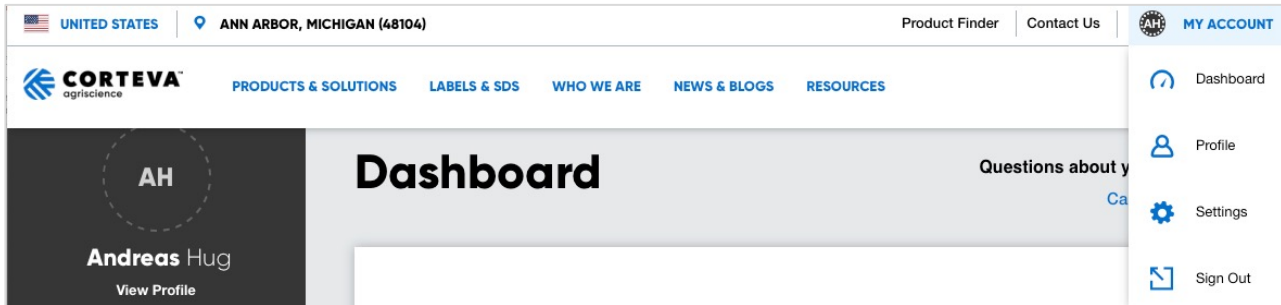
SIGN IN

Don't have an account?

[SIGN UP NOW](#)

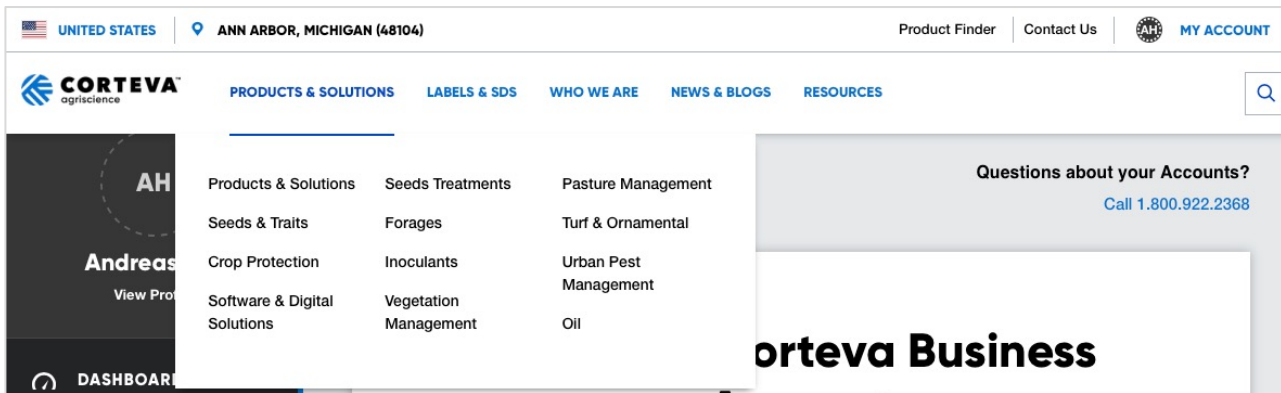
# Competitive Analysis Corteva Agriscience

## Dashboard Utilities & Global Navigation



Once logged into the portal, it was very intuitive to get oriented as they have personalized dashboard page, clear utility eyebrow navigation, global navigation, and easily accessible profile section.

The global navigation categories and fly-out navigation were also easy to use and offered a good variety of both products, labels & SDS, and resources.



# Competitive Analysis Corteva Agriscience

## Easily Accessible User Preferences

The screenshot shows the user preferences page for Corteva Agriscience. The top navigation bar includes the location 'UNITED STATES' and 'JOHNSTON, IOWA (50131)', along with links for 'Product Finder', 'Contact Us', and 'MY ACCOUNT'. The main navigation menu features 'CORTEVA agriscience' and categories like 'PRODUCTS & SOLUTIONS', 'LABELS & SDS', 'WHO WE ARE', 'NEWS & BLOGS', and 'RESOURCES'. A search icon is also present.

The 'SETTINGS' section is active, showing options for 'HELP'. The 'Messages from Corteva' section is titled 'How would you like to hear from us?' and includes a checked checkbox for receiving marketing communications. Below this, there are three rows of communication preferences:

Method	Value	Action
Email	andreas.laszlo.hug@gmail.com	Edit
Text	(734) 604-0764	Edit
Phone	Add Phone	
Postal Mail	Add Address	

At the bottom, the 'Security' section includes a 'Change Password' link.

Within the profile section users are easily able to access settings and, among other things, choose their email and text preferences.

Providing additional preferences to users is a great way to enhance personalization efforts.

# Competitive Analysis Corteva Agriscience

Content Pages &

The screenshot displays the Corteva Agriscience website. At the top left is the Corteva Agriscience logo. A navigation menu is open, listing categories such as Products & Solutions, Seeds & Traits, Crop Protection, Software & Digital Solutions, Seeds Treatments, Forages, Inoculants, Vegetation Management, Pasture Management, Turf & Ornamental, Urban Pest Management, and Oil. A search icon is visible in the top right. Below the navigation is a large banner for 'Seed Treatments' with the headline 'Increase your potential. Every season. Introducing LumiGEN™ technologies.' The banner text states: 'Our rigorously tested, verified seed treatments help you establish healthy crops and improve yield with proven protection against early season threats.' Below the banner are three product cards: 1. DuPont™ Lumisena™ Fungicide: 'Protect soybeans against Phytophthora with a new class of chemistry and a new mode of action.' 2. DuPont™ Lumivia® Insecticide: 'Defend your corn against a broad spectrum of early season pests below and above ground.' 3. DuPont™ Dermacor® X-100: 'Higher rice yields start at the beginning of the season with early control of destructive pests.' Each card includes a 'Learn More About DuPont' link with an arrow icon.

Access to the products catalog allows users to conduct on the spot research and broaden their understanding of the company's offerings.

Viewing the portal as a one-stop shop and research center for a variety of user groups could potentially provide greater insights into what your most loyal customers are interested in.

# Landscape Analysis J&J Vision

## My Personalized Dashboard

The dashboard features a dark navigation bar with links for 'Important Safety Information', 'About', 'Search', a notification bell, and the user's name 'Andreas'. Below this is a white header with the 'Johnson & Johnson VISION' logo, navigation menus for 'Products', 'Education Center', 'Business Center', and 'My Practice', and a prominent 'Order Center' button. The main content area is personalized, starting with 'Hi Andreas,' and links to 'Profile' and 'Log Out'. A central message encourages users to 'Get started ordering products, taking online courses, earning rewards, and more.' This is followed by a grid of five service tiles: 'Order Products Online' (shopping cart icon), 'My Learning' (graduation cap icon), 'ECP Locator' (open book icon), 'Team Management' (cube icon), and 'Fitting Calculator' (computer monitor icon). A bottom section titled 'Enjoy more services and benefits when you link your profile to a business account' includes three more tiles: 'Rebate Rewards' (star icon), 'Find an Eye Doctor' (envelope icon), and 'Subscription Services' (refresh icon).

After logging into the portal, the user is provided with a very succinct set of features, including product ordering, education center, management, and tools. The use of iconography and the squares positioned in a grid view does a great job of highlighting drill-down opportunities.

The eyebrow navigation features everything we'd expect from portal architecture, including alerts and username with immediate access to profile management and preferences.

# Landscape Analysis J&J Vision

## Global Navigation & Utility Navigation

The screenshot displays the J&J Vision user interface. The top navigation bar includes links for 'Important Safety Information' and 'About'. The utility navigation bar features a search bar, a notification bell icon with a '4' badge, and a user profile dropdown menu labeled 'Andreas'. The main content area shows a personalized greeting 'Hi Andreas,' followed by a search bar and a notification center. The notification center lists four promotional assets with timestamps and a 'Read More' button. The user profile dropdown menu is expanded, showing options for 'Dashboard', 'Profile', 'Notification Center', 'My Learning', and 'Log Out'.

We thought that the notification center was a nice touch. In addition to providing featured news, it is also a great way to inform users of required tasks that need to be accomplished or reminders.

As noted on the previous page, the dropdown user utility navigation in the eyebrow provides a myriad customizable features and access points.

# Landscape Analysis J&J Vision

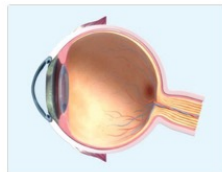
Homepage: CTAs & Resources



Similarly, to what was available on the Corteva portal, here we also have clearly organized resources detailing product information, practice building (for HCPs), and patient resources.

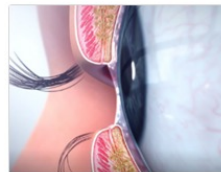
Addressing the needs of key user groups through targeted CTAs is a great way to keep users coming back and targeting content.

## Recommended Resources :



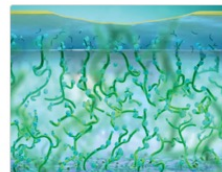
### Virtual Eye Model

Learn basic eye anatomy with this interactive models, view video tutorials of common refractive errors, and see how contact lenses can help give you clear vision.



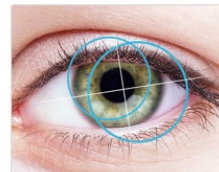
### Meibomian Gland Dysfunction (MGD)

MGD is a chronic and progressive condition<sup>1,2,3</sup>



### ACUVUE OASYS® 1-DAY Hydraluxe™ Technology

Technology that helps keep patients' eyes feeling moist so they can focus on their day, not their contacts.



### Eyelid Stabilized Design

Works naturally with the eyelids and harnesses the power of the blink to help keep the lens in the correct position—for consistent, clear, stable vision

# Landscape Analysis J&J Vision

Homepage: Indexed Mega Footer

## About

- About Us
- News & Media
- Grants
- State & Federal Advocacy
- Direct Ordering
- Discontinued Products
- Site Map
- Transparency

## Useful Links

- Contact Us
- Events
- FAQs
- Contact Lens Sales Policy
- Contact Lens Return Policy
- Diagnostic Contact Lens Policy
- Principal Investigator
- JNJVISIONPRO Website User Guide – Vision Care users

## Legal

- Privacy Policy
- California Compliance
- Important Safety Information
- Legal Policy
- Intellectual Property
- Cookie Policy

## Connect With Us



Careers

As with any homepage or dashboard, the global footer is another excellent area to aggregate (index) key categories of the portal experience.

In addition, it is also a common place to add a sticky chat bot and/or social media links in the form of icons.

© 2021 Johnson & Johnson Vision Care, Inc. and Johnson & Johnson Surgical Vision, Inc. All rights reserved. This site is published by Johnson & Johnson Vision Care, Inc. and Johnson & Johnson Surgical Vision, Inc., which are solely responsible for its content. PP2019MLT4132

Connected by Sight.™



We support the AdvaMed Code of Ethics on interacting with healthcare professionals.

# Landscape Analysis J&J Vision

## My Learning Center: Courses, Progress, and Completed

Home / Education Center / My Learning

### My Learning

Find new courses or quickly access saved, started, or completed Vision Care professional courses.

All In-Progress Completed

#### Find Learning Content

Filters

Content Type


- In-person Events
- Live Virtual Events
- On-Demand Library

Content Topic

- Astigmatism
- Examination Techniques
- Extended Wear
- Light Management
- Ocular Surface
- Patient Communication

Sort by:

Browse by Keyword:  [GO](#)



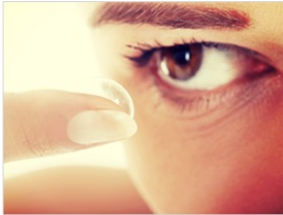
Vision Care Resources

#### ECPs Agree – ACUVUE® OASYS with Transitions™ can help address today's digital device dilemma

Facing an unprecedented increase in digital device usage among their patients, eye care professionals are having success leveraging the indoor benefits of the first-of-its-kind<sup>1</sup>, ACUVUE® OASYS with Transitions™.

Estimated reading time: 6 min

[View](#)



On-Demand Learnings

#### Advanced Training: Specialty Contact Lenses & Effective Conversations with Patients

A four-module course for team members who would like to expand their knowledge into more advanced contact lens topics such as multifocal, toric and patient education. \*Please open this training in Google Chrome\*

Duration: 0 min

[Begin Course](#)

Perhaps one of the best features of the J&J Vision site is the 'My Learning' section which is well organized and easy to use.

The use of the tab navigation is fully appropriate here as it allows the user to navigate quickly between in-progress and completed learning modules. The default tab features a robust filtering feature allowing users to filter course by content type and topic, among others.

Users are also able to sort by date and browse by keyword.

Finally, the course descriptions themselves, along with the noted duration and CTAS provide other key pieces of information to users.

# Landscape Analysis MyBayer

Homepage: Resource Management

Monday, December 28, 2020

username

password

SUBMIT

Not a My Bayer Rewards Member? [Register now](#) [Forgot username / password](#)

## MyBAYERRewards



HOME REWARD POINTS

Welcome  
to My Bayer Rewards



*Don't miss out*

Earn Reward Points all year long.

[learn more](#)

### Welcome to My Bayer Rewards

Earn rewards when you buy the products you love. Signing up is easy.

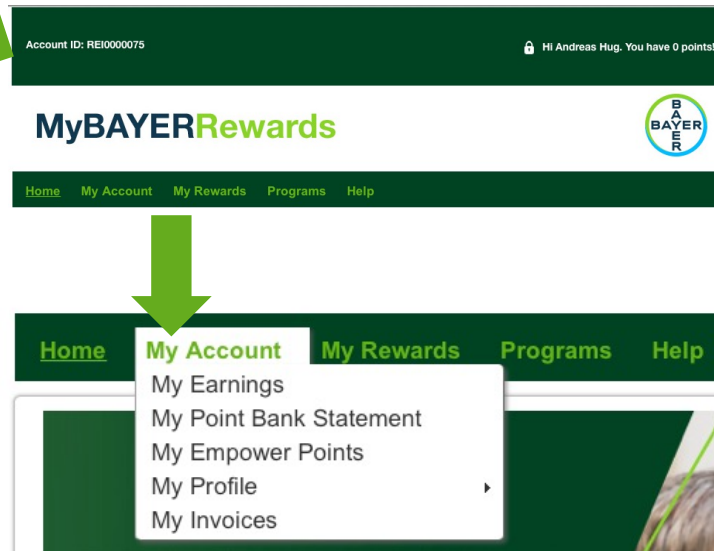
[Register Now](#)

[Member Benefits](#)

Prior to registering a MyBayer Rewards account, it was remarkable to note how seamless the overall design system implementation is and how easy it was to register for an account utilizing two-factored authentication. In addition, the registration landing page did a good job of demonstrating the value proposition for creating an account.

# Landscape Analysis MyBayer

## Homepage: Resource Management



The information hierarchy is explicit in the MyBayer global navigation and logically organized.

For starters, there is the date, logout, and 'Contact Us' links within the eyebrow navigation at the very top, followed by the portal name, logotype, and global navigation utilizing drop-down menu. This clearly defined hierarchy and groupings is something that meets user's expectations and offers a clear path forward.

# Landscape Analysis MyBayer

## View Profile: Editing Profile

### View Profile

This is your personal profile information as it exists in My Bayer Rewards.

To update your information, click the "Edit" button.

<b>BASIC INFORMATION</b> <b>Andreas Hug</b> Company Name REINDERS, INC Account ID REI0000075 Username REI0000075 Rewards Member Level Bronze GCSAAID Parent Company Name	<b>WORK ADDRESS / EMAIL</b> 980 Troon Highland, MI, 48357 United States (248) 889-2554 andreas.hug@mrm.com	<b>HOME ADDRESS</b> 980 Troon Highland, MI, 48357 United States (248) 889-2554
---	---	--

**Edit**

### View Profile


This is your personal profile information as it exists in My Bayer Rewards.

To update your information, click the "Edit" button.

<b>BASIC INFORMATION</b> <b>Andreas Hug</b> Company Name REINDERS, INC Account ID REI0000075 Username REI0000075 Rewards Member Level Bronze GCSAAID Parent Company Name	<b>WORK ADDRESS / EMAIL</b> Address Line 1 980 Troon Address Line 2 City/Town Highland State/Province/Region Michigan	<b>HOME ADDRESS</b> Address Line 1 980 Troon Address Line 2 City/Town Highland State/Province/Region Michigan
---	--	--

<b>ORGANIZATION INFORMATION</b> Organization REINDERS, INC ASM ROBERT PYLAR Email ROBERT.PYLAR@BAYER.COM	<b>EMAIL OPT-IN/OUT</b> <input checked="" type="checkbox"/> Yes, send me emails about Bayer customized solutions, new product launches and product guides.
---	---

**Save** **Cancel**



Edit Personal Profile data was exceptionally intuitive and easy to do. Users simply click on the "Edit" button and the editable fields appear as populated input fields. Users are then free to change the data and click 'Save.'

This editing behavior is also similar like most 3<sup>rd</sup> party grid plug-ins including ag-Grid which makes editing data far more succinct and intuitive.

# Landscape Analysis MyBayer

My Invoices: Search



[Home](#) [My Account](#) [My Rewards](#) [Programs](#) [Help](#)

## My Invoices


To view your invoices, enter an invoice date range and click 'Submit'.

Qualifying sales will be reported through electronic submission by the Distributor or Agent. Please allow 6-8 weeks from invoice date for sales to show up in your account.

**If an invoice is missing from your report, email the missing invoice, along with your My Bayer Rewards Account ID, to [mybayerrewards@one10marketing.com](mailto:mybayerrewards@one10marketing.com) and we will work with Bayer to verify invoices.**

Start Date \*   End Date \*  

---

 [@BayerGolf](#)

ALWAYS READ AND FOLLOW LABEL INSTRUCTIONS.  
Bayer Environmental Science, a Division of Bayer CropScience LP, 5000 CentreGreen Way, Suite 400, Cary, NC 27513. For additional product information, call toll-free 1-800-331-2867.  
<https://www.environmentalscience.bayer.us/>. Not all products are registered in all states. Bayer and the Bayer cross are registered trademarks of Bayer. ©2020 Bayer CropScience LP

[Privacy Policy](#) | [Terms & Conditions](#) | [Contact Us](#)  
© 2020 One10 LLC. All Rights Reserved.

Having dedicated search capabilities for features like invoice look-up increases user satisfaction in addition to being highly practical.

Sales X could potentially benefit from additional user research in determining what additional tools and resources users might find helpful in task completion.

# Landscape Analysis MyBayer

## Rewards: Down to Business

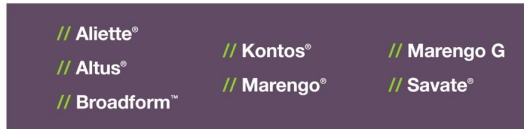


**Let's Grow! Rebate Program** An exclusive offer for Ornamental Growers.

It's easy to earn your rebate.

- Purchase \$15,000 or more of eligible products through Bayer authorized distributors and agents.
- Make your purchases between October 1, 2019 and September 30, 2020. The choice is yours!
- Earn a Base Rebate based on purchases of eligible products during program period.
- **NEW THIS YEAR!** Earn a Growth Rebate if you increase your eligible purchases by 15% over the prior year.
- Growers that qualify for the Growth Rebate will earn the Base Rebate + the Growth Rebate on all eligible purchases in the eligibility period\*.
- Rebate payment will be made directly to the grower before December 31, 2020.
- Get full program benefits without having to stock excess inventory.
- This exclusive offer is for My Bayer Rewards members only.

Eligible products

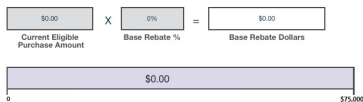


**Andreas Hug, watch your rebate grow.**

The more you buy, the more you can save.

Eligible Grower Purchases	Base Rebate	Growth Rebate	Total Potential Rebate
\$15,000 - \$24,999	2%	3%	5%
\$25,000 - \$74,999	4%	3%	7%
\$75,000 +	8%	2%	10%

[View my invoices](#)



**NEW THIS YEAR!**

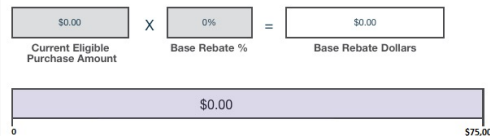
*If you qualify for the Base Rebate AND have purchased 15% or more product compared to reported purchases of eligible products in the prior year, you can earn a Growth Rebate, which is an additional 3%. Example: A grower that purchases \$50,000 and has increased purchases by 15% or more, will earn 7% on all eligible purchases in the period.*

\*Any product that is resold or transferred to a third party is not eligible for rebate.

The more you buy, the more you can save.

Eligible Grower Purchases	Base Rebate	Growth Rebate	Total Potential Rebate
\$15,000 - \$24,999	2%	3%	5%
\$25,000 - \$74,999	4%	3%	7%
\$75,000 +	8%	2%	10%

[View my invoices](#)



**NEW THIS YEAR!**

*If you qualify for the Base Rebate AND have purchased 15% or more product compared to reported purchases of eligible products in the prior year, you can earn a Growth Rebate, which is an additional 3%. Example: A grower that purchases \$50,000 and has increased purchases by 15% or more, will earn 7% on all eligible purchases in the period.*

\*Any product that is resold or transferred to a third party is not eligible for rebate.

As with most offers, we've learned to be leery of things that sound too good to be true. In the case of MyBayer rewards, the value proposition is spelled out explicitly and supported by simple graphs illustrating mathematical equations used in determining rewards (rebates).

Late breaking new years news has been added in green below and while not the best typographical choice (green italicized text) it does provide a good example.

# Landscape Analysis MyBayer

Homepage: Resource Management

## My Bayer Rewards FAQs

[General](#)  
[User Profile/Log In](#)  
[Account Activity](#)  
[Reward Points](#)  
[Reward Points Redemption](#)  
[Distributor Credits or Company Checks](#)  
[Technical](#)  
[Contact](#)

### General

#### What is My Bayer Rewards?

My Bayer Rewards is a program where members can earn Reward Points for eligible Bayer Turf & Ornamental purchases. Typical promotions include our annual Fall Solutions, various In-Season promotions and our year-long Reward Points program. Reward Points can be redeemed for a variety of items in our online catalog.

#### Is membership in My Bayer Rewards required to participate in ANY Bayer promotion?

Yes, membership in My Bayer Rewards is required for any company choosing to participate in ANY Bayer promotion administered through My Bayer Rewards (e.g., Fall Solutions promotion). Membership includes acceptance of the program Terms & Conditions.

#### Who can participate?

All Bayer Turf & Ornamental golf course superintendents, lawn care operators, and greenhouse nursery growers (Customers) can participate. In addition, Distributors and Distributor Sales Reps (DSRs) outside of Distributor-managed accounts are eligible to register and participate. Dealers (resellers) are not eligible.

#### What are the membership requirements?

Participants must provide contact information, business address and valid email address during registration (so we can contact you regarding your account activity) and accept the program Terms & Conditions.

[Return to the Top](#)

Unlike the Sales X implementation of FAQs, the MyBayer rewards portal lists FAQs by subject with an anchor point navigation on the top of the page well above the fold.

Providing users with a clear path to help and self services has been noted to increase user satisfaction while also making portals and websites easier to use and navigate.

Since Sales X does not have a sticky chat bot, it is particularly important to make sure users can find and get access to the resources they need.

---

**Thank You.**

**Questions?**