

ACT! by Sage 2010: Delivering on Usability and Productivity

Easier than ever to learn, use, and do more!



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“Usability should be a major criterion for purchasing software and is an important component of total cost of ownership.”

Executive Summary

Usability should be a major criterion for purchasing software and is an important component of total cost of ownership. At Sage, usability is a cornerstone in creating the user experience of our products and productivity is the benefit to you. In the past year, Sage Global CRM Solutions has increased our efforts related to usability. We have implemented a progressive program of customer research involving hundreds of customers and partners. Through this research we've gained a better understanding of customer needs. From studying your use of earlier versions of ACT!, we learned that you wanted to more easily find what functions are in the product and that you needed ACT! to be easier to use so you can do more. As a result, one of our major goals for 2010 was to increase the focus on the overall user experience to make it even easier to learn, use, and do more with ACT!

To determine the effectiveness of ACT! 2010, we conducted benchmark usability tests. A comparative usability test showed that the learning curve of ACT! 2010 improved by 250%. Using an industry benchmark for ease of use based on the System Usability Scale (SUS), we found that ACT! 2010 scored higher than previous versions of ACT! and scored well above the industry average with a score higher than 79% of all other products rated. In addition, we found that ACT! 2010 is preferred over previous versions.

To determine the quality of the ACT! 2010 design compared to the competition, we conducted a Keystroke Level Modeling (KLM) study of ACT! and five competitors. KLM is an analysis technique where common user tasks are assessed by scoring the number of operations (e.g. “clicks & keystrokes”) thereby creating metrics to compare user productivity.

The results of the KLM study show that ACT! was rated number one in user productivity, while Microsoft® and Salesforce.com finished 5th and 6th respectively. Overall, ACT! was rated as most efficient with on average 17% higher productivity than competitors. Notably, the same tasks take 25% longer to complete in Microsoft Dynamics® CRM and 37% longer using Salesforce.com. With ACT!, it simply takes less time to get the same work done.

In order to prove and improve design quality, we've measured it. We know that usability and the quality of the user experience are vitally important. That's why we've made ACT! 2010 easier to learn and easier to use. Most importantly, with ACT! it's also easier to do more.

“We’ve made ACT! 2010 easier to learn and easier to use. Most importantly, with ACT! it’s also easier to do more.”

Introduction

In *CRM at the Speed of Light: Essential Customer Strategies for the 21st Century*, Paul Greenberg says usability “is perhaps the most important factor related to systems that you are going to install at your company. Usability needs to be considered a major design factor and is certainly a component of total cost of ownership.”¹ At Sage, we certainly agree. Usability is a cornerstone in creating the user experience of our products—and productivity is the impact.

The Usability Professionals Association offers a number of definitions of usability. One of the most incisive is the following: “Usability is a measurable characteristic, that is present to a greater or lesser degree, (and) that describes how effectively a user can interact with a product. It can also be thought of as how easy a product is to learn and how easy it is to use.”²

In the past year Sage CRM Solutions has increased our efforts related to usability. We’ve increased our focus on industry-leading customer-driven design methodologies and created a unified User Experience team with a mission of improving usability and designing compelling product experiences.

Furthermore, we’ve expanded our practice with numerous formal research techniques. Our work has included a progressive program of customer research. In addition to our traditional market research, during the development of ACT! 2010 we conducted ten usability studies involving hundreds of existing and prospective ACT! users. Users participating in these studies represent ACT! Certified Consultants, ACT! Administrators, and end users from the small business owner and sales professional communities. Through this research we’ve gained a better understanding of customer needs. From studying your use of earlier versions of ACT!, we learned that you wanted to more easily find what functions are in the product and that you needed ACT! to be easier to use so you can do more. So, one of our major goals for ACT! 2010 was to increase the design quality. That’s why we’ve made ACT! 2010 easier to learn and easier to use. Most importantly, with ACT! it’s also easier to do more.

This paper describes some of that work and the results you can expect to experience in ACT!.

¹ CRM at the Speed of Light: Essential Customer Strategies for the 21st Century, Paul Greenberg

² Jeff Axup, UserDesign
http://www.upassoc.org/usability_resources/about_usability/definitions.html
July 5, 2009

“Our goal was to make navigation as effortless as possible.”

Proving Usability and Productivity

While creating ACT! 2010 we emphasized a number of usability and productivity related themes. Our first focus area was on navigation. Navigation is the act of finding your way around in a software product. Similar to navigating when traveling by car, there sometimes are easy paths and sometimes difficult paths depending on the route and the signs provided. Our goal was to make navigation as effortless as possible. We did this by creating simplified “context-driven” menus, by including a familiar “PC-style” navigation scheme to access views, and by augmenting the traditional top-of-screen toolbar with big “easy buttons” to allow instant recognition and access to the most frequently used functions. In addition, we added a persistent Lookup box, so you can search for information more quickly (Figure 1).

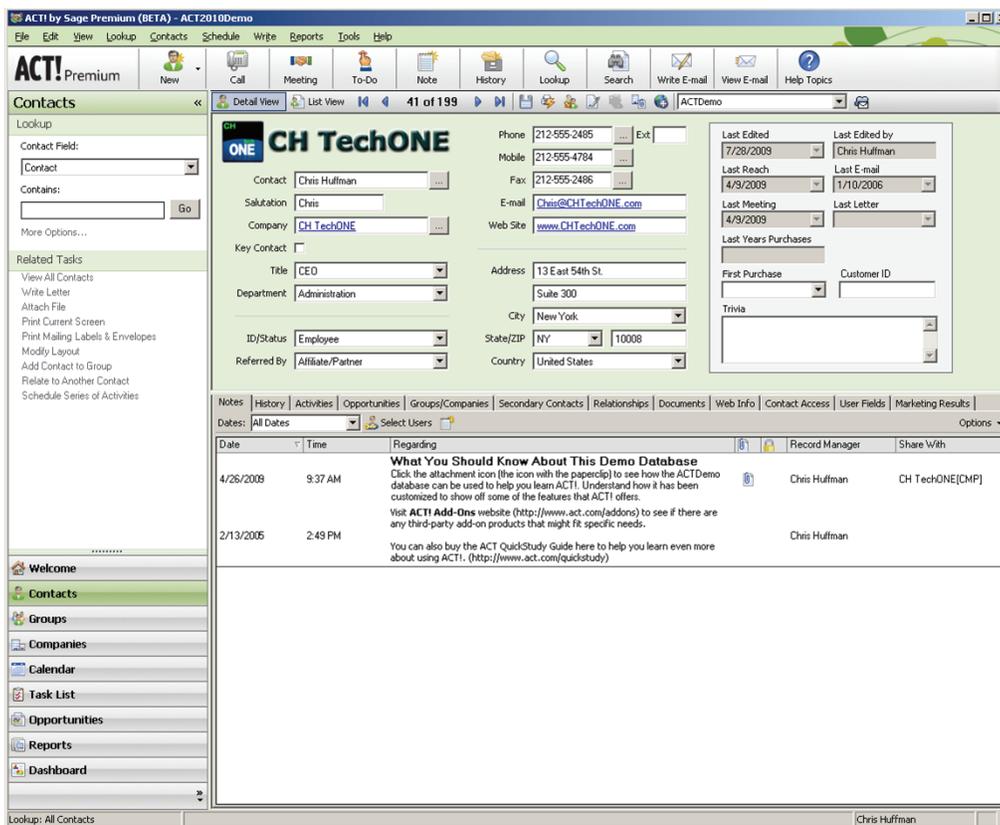


Figure 1: Contact Details Screen Showing New User Interface Elements

Second, we added a customizable Welcome page as a home base for users (Figure 2). This new screen is a navigational aid and a touchpoint for beginning ACT! users. It is also a place for all ACT! users to discover important features and how to use them. It exposes advanced features and provides assistance to experienced users who need to access infrequently used functionality. It also provides a view tailored specifically for Administrators.

“How do we prove usability and design quality? Quite simply, we have to measure it.”

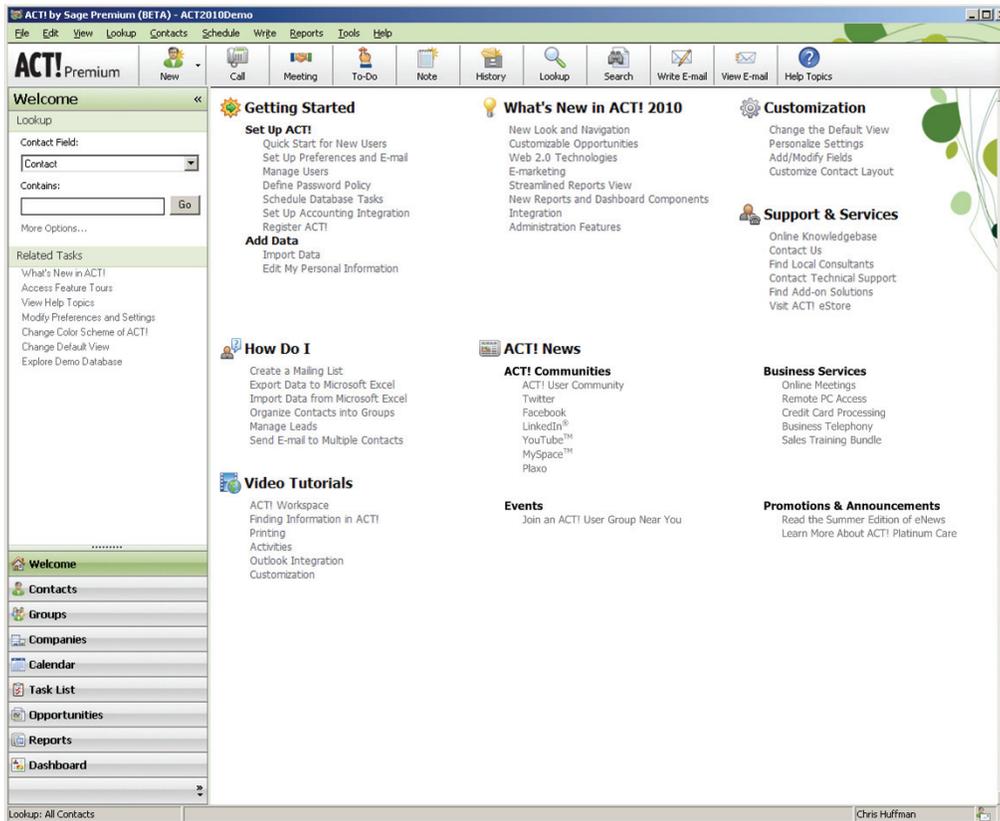


Figure 2: The New Welcome Page

In addition to our other themes, we improved the graphic design of ACT! and adopted the new Sage visual identity. We made visual design choices to help improve ease of reading as well as aesthetics. These improvements have prompted comments from customers such as “It’s easy on the eyes and there’s continuity throughout the screens.”³

Our ACT! 2010 usability objectives included being the best ACT! ever and being better than the competition. But, how do we *prove* usability and design quality? Quite simply, we have to measure it.

We conducted a number of research studies during the formative periods of development. Most of that work was qualitative in nature and each round of research led to design improvements. However, to measure and validate our program of work, we partnered on two additional studies with Measuring Usability, LLC, a respected consultancy and industry leader in quantifying usability. Their involvement provided an independent and objective complement to our User Experience staff. They provided tactical support for implementation of best practices, delivered unbiased analysis, and gave us additional statistical expertise.

Summative Usability Testing

To determine the quality of the design compared to our last release, we conducted a Summative Usability Test of ACT! 2010 during the Alpha stage of development. Usability tests are research studies where users are observed performing common tasks with software then interviewed about their experience and opinions. Summative usability tests are specialized quantitative usability tests that require statistical analysis and produce a set of metrics describing various characteristics of usability.

³ Verbatim from customer during ACT! by Sage 2010 usability testing, February 2009

“ACT! 2010 is 2.6 times more learnable than previous editions, or an improvement of about 250%.”

Such testing gives us objective benchmarks based on direct observational feedback from real users and allows us to make improved design decisions based on empirical data.

For this study, we conducted two summative usability tests with a balanced mix of Sales Professionals and Small Business Owners recruited by a third-party market research firm. For purposes of direct comparison, we tested a set of tasks on both ACT! 2009 and ACT! 2010. This approach gave us baseline measures and a validation of the new design. In addition, we tested new features and functions in ACT! 2010 to get user feedback and to improve the designs.

Keystroke Level Modeling

To determine the effectiveness of the ACT! 2010 design compared to competitive products, we conducted a Keystroke Level Modeling (KLM) study. Keystroke Level Modeling is a proven technique for measuring productivity. It is an analytic technique where common user tasks are assessed by scoring the number of operations (i.e. steps) physically required to complete each task (such as clicks and keystrokes). As part of the analysis, each user action is also assigned a standard time. For example, clicking on a button with a mouse takes 230 milliseconds and moving your hand from the mouse to the keyboard takes 360 milliseconds. The time per operation is taken from averages of trials of experienced users and has been standardized for use in industry. Thus, with the KLM technique, a research team can accurately, objectively, and quantitatively assess tasks across many products to compare measures of user efficiency and productivity.

Easy to Learn

One of the critical concepts we were assessing in the Summative Usability Test was the level of learnability, which is to say that we were attempting to measure the “learning curve” of the product.

To test the learning curve, we selected common tasks to be repeated, then randomly assigned one to each user. We next measured how well users were able to perform the repeated task on their second trial in comparison to their first trial. The “learnability” task was performed at the beginning of each session and again at the end, with a number of additional tasks in between so as not to skew the results.

In principle, once someone has completed a task the first time they will be more efficient at it the second time. Based on benchmark data, we anticipated users would perform tasks an average of 19 seconds faster the second time. However, what we found was an average reduction in task time of 69 seconds. This reduction demonstrates that ACT! 2010 is 2.6 times more learnable than previous editions, or an improvement of about 250% (Figure 3).

“Experienced users will be substantially more productive with ACT! 2010 and new users will be able to very quickly learn and become productive with the product.”



Figure 3: Demonstration of Improved Learnability

Given that study participants were all experienced with earlier versions of ACT!, we would have expected a bias in performance with the older product. Users reported an average of about 2000 hours of experience with the legacy design over an average of over four years of use. Given that the new design is sufficiently different, we might expect it would take an investment of at least as many months to have equal performance using ACT! 2010. However, the data shows that not only is the learning curve substantially improved for ACT! 2010, but actual task performance on the second trial in ACT! 2010 was statistically equal to performance with the previous ACT! user interface. In other words, within a matter of minutes of using ACT! 2010, users performed just as well as they had with a product they had been using for over four years.

This result means that after spending additional time with the new product, experienced users will be substantially more productive with ACT! 2010 and new users will be able to very quickly learn and become productive with the product.

“Against industry benchmarks...ACT! 2010 demonstrated 58% better than average usability based on percentile rankings and scores higher than 79% of all other products.”

Easy to Use

ACT! has been known as a leader in usability for many years. For example, ACT! is routinely lauded for ease of use. AMR Research Alert summed up the sentiment by saying “I am still amazed that not one (competitor) has been able to replicate the ease, simplicity, and grace of ACT!”⁴ More recently, one of the many strengths of ACT! 2009 as cited by Gartner was ACT!’s “ease of use and simplicity.”⁵

While we’re flattered to routinely receive praise for usability, we still try to improve ease of use with each release. As part of the Summative Usability Test for ACT! 2010, participants were given a survey at the end of the interview and asked to rate their overall experience with the software. The survey used was the System Usability Scale (SUS), a ten-question survey which is a widely-used industry standard questionnaire. It provides an overall usability score on a familiar 100 point scale, which makes it easy to understand and communicate the results.⁶

An additional benefit of using the SUS is that a sufficient number of publicly available scores from over 200 software products and websites exists to use as a comparison versus industry benchmarks.⁷

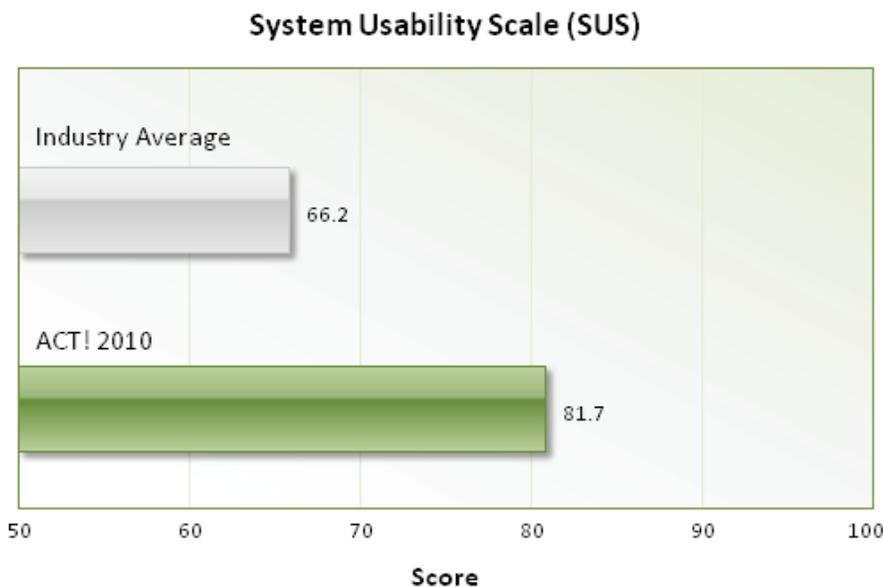


Figure 4: Ease of Use as Measured by System Usability Scale (SUS) Scores

The previous version of ACT! set a high bar for usability, which makes it difficult to improve. But, the results of the SUS survey show that ACT! 2010 scored even higher than ACT! 2009. In addition, we surveyed current ACT! users and found that ACT! 2010 is preferred over previous versions.

Against industry benchmarks, using the publicly available SUS data, we show that ACT!’s score of 81.7 compares favorably to an industry average score of 66.2 (Figure 4). Furthermore, ACT! 2010 demonstrated 58% better than average usability based on percentile rankings and scores higher than 79% of all other products.

4 AMR Research Alert, “ACT! 6.0, New and Improved,” August 30, 2002

5 Gartner Research, Publication Date: 15 July 2008, ID Number: G00159067 Magic Quadrant for Sales Force Automation – Robert P. Desisto

6 Brooke, J. (1996) SUS: a “quick and dirty” usability scale. In P.W. Jordan, B. Thomas, B.A. Weerdmeester & A.L. McClelland (eds.) Usability Evaluation in Industry. London: Taylor and Francis.

7 Bangor, A., Kortum, P. T., Miller, J. T.: An Empirical Evaluation of the System Usability Scale International Journal of Human-Computer Interaction. 24, 574—594 (2008)

ACT! by Sage

“The same tasks take 25% longer to complete in Microsoft Dynamics CRM and 37% longer in Salesforce.com. By using ACT!, it simply takes less time to get the same work done.”

Easy to Do More

To gauge the quality of ACT! compared to competitive products we analyzed the Keystroke Level Modeling (KLM) data. This study reinforced our productivity findings from the usability test.

At Sage, we have a large volume of “task-centric” data and feedback from ACT! customers. To conduct the KLM study, we selected a set of known common tasks that users perform with contact management and CRM software. These are typical tasks that are performed frequently and are critical to users. We analyzed the top eleven tasks in terms of “clicks and keystrokes,” but determined that only seven tasks were fully supported by all products in the study.

Therefore, to get a fair comparison, we used data from these common tasks:

- Find information about last meeting with a contact
- Create a new contact
- Search for all contacts in a specific area
- Schedule a call
- Record notes about a contact/customer meeting
- View your work week calendar
- Mark an activity complete and schedule follow-up

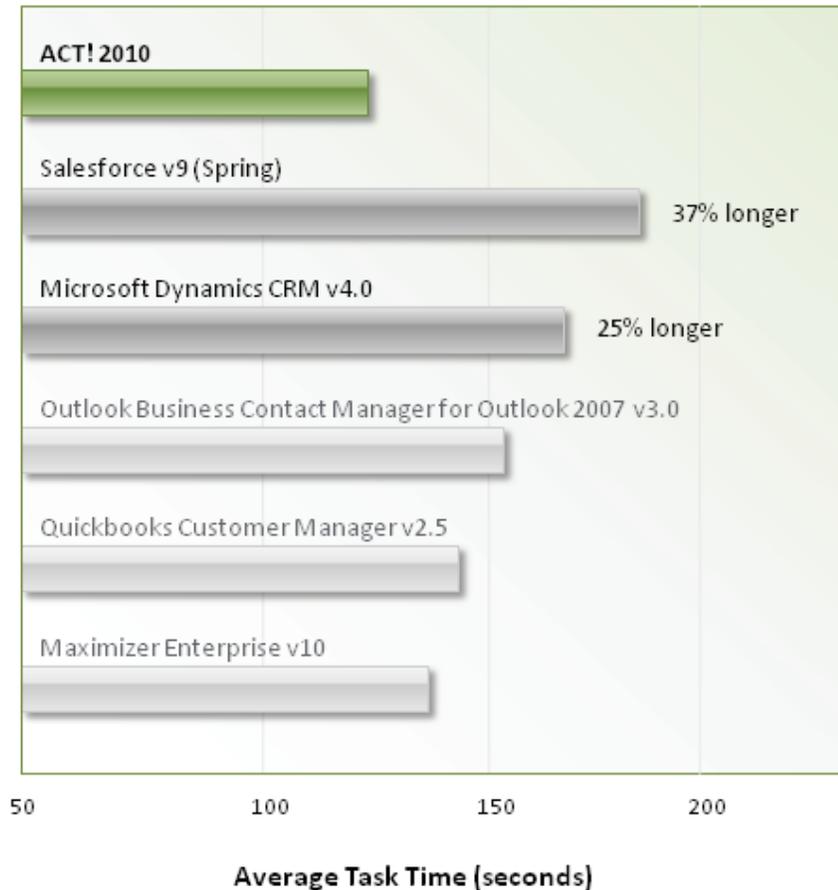
The analysis used the number of operations and time required to complete each task as metrics to compare user productivity. For this study, ACT! 2010 for Windows® was compared to the following products:

- QuickBooks® Customer Manager v2.5
- Maximizer Enterprise v10
- Microsoft Dynamics CRM v4.0
- Outlook® Business Contact Manager for Outlook 2007 v3.0
- Salesforce.com v9 (Spring)

The outcomes of the statistical analysis show that ACT! ranked 1st in user productivity, with the lowest number of operations (i.e. “clicks & keystrokes”) and least amount of time required to complete the common tasks. Meanwhile, Microsoft and Salesforce.com finished 5th and 6th respectively (Figure 5).

Overall, ACT! was rated as most efficient with an average of 17% higher productivity compared to competitors. Looking strictly at products “in class” (meaning Windows-based user experience versus browser-based user experience), ACT! showed an average of 10% higher productivity. Furthermore, the same tasks take 25% longer to complete in Microsoft Dynamics CRM and 37% longer using Salesforce.com. By using ACT!, it simply takes less time to get the same work done.

Time to Complete Tasks



“ACT! by Sage is the #1 selling Contact and Customer Manager in the world and it delivers on usability and productivity. Ask yourself, what would 10-37% higher productivity on work you do every day for sales and marketing be worth to your business?”

Figure 5: Lower Amount of Time to Complete Tasks Equals More Productivity

Conclusion

Paul Greenberg had it right in *CRM at the Speed of Light: Essential Customer Strategies for the 21st Century*. He said that “It is not just ease of use that determines usability, no matter how easy it is to qualify it that way. (Usability) also takes into account how quickly a system can be learned.”⁸ Usability and the quality of the user experience are vitally important. That’s why we made ACT! easier to learn and easier to use. That’s why we went to considerable effort in the design of ACT! 2010 to understand what tasks users perform frequently. We specifically targeted improvements in basic navigation, feature discoverability, and optimization. Using respected industry methods, we measured the overall usability of ACT! 2010 versus previous versions of ACT! and competing products. The results are conclusive, the usability of ACT! 2010 is industry leading.

Most importantly, with ACT! it’s easier to do more. When people work, they’re usually in a hurry. Time is almost always money. Studies have shown that by improving usability, large companies can demonstrate productivity gains of \$2-3 million per year.⁹ ACT! by Sage is the #1 selling Contact and Customer Manager in the world and it delivers on usability and productivity. Ask yourself, what would 10-37% higher productivity on work you do every day for sales and marketing be worth to your business?

8 CRM at the Speed of Light: Essential Customer Strategies for the 21st Century, Paul Greenberg

9 <http://www.useit.com/alertbox/intranet-usability.html>

Important Note: Review ACT! system requirements at www.act.com/2010systemreq. You must purchase one license of ACT! per user. Scalability varies based on hardware, size, and usage of your database. **Compatibility:** Due to new functionality available in ACT! 2010, we strongly recommend contacting your add-on product provider to confirm compatibility. Using versions of the add-on product that have not been confirmed compatible by the vendor may result in features behaving differently or not appearing within ACT! 2010. Visit www.actsolutions.com or contact your add-on product provider to help determine compatibility.

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About ACT!

ACT! by Sage is the #1 selling contact and customer manager in the world with 2.8 million users. It's designed so you can organize all the details of your customer relationships in one place for a complete view of the people you do business with. Improve your marketing effectiveness to attract new customers and get more from existing relationships. And, take action on your most qualified sales leads with total visibility and control of your pipeline. Because ACT! is easy to learn and use, you can be more productive right away. Continue working with your existing business solutions, like Microsoft Outlook, Word, Excel, and Lotus Notes, because they integrate with ACT!.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.