

We want to improve the Leads page on the ICOM portal by creating a new layout that showcases more information than the current format allows.

Please respond thoughtfully and thoroughly to help the design team build a scalable leads page. These answers may directly affect, not only our internal teams but also, our clients using the portal.

**Start**

press **Enter** ↵

🕒 Takes X minutes

1 → Please provide your name, team, and position.\*

*Description (optional)*

Type your answer here...

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The first set of questions is based on the display of information within the Leads page.

*Description (optional)*

**Continue**

press **Enter** ↵

2 → How often do you use the leads page?\*

*Description (optional)*

A Every day

B Every few days

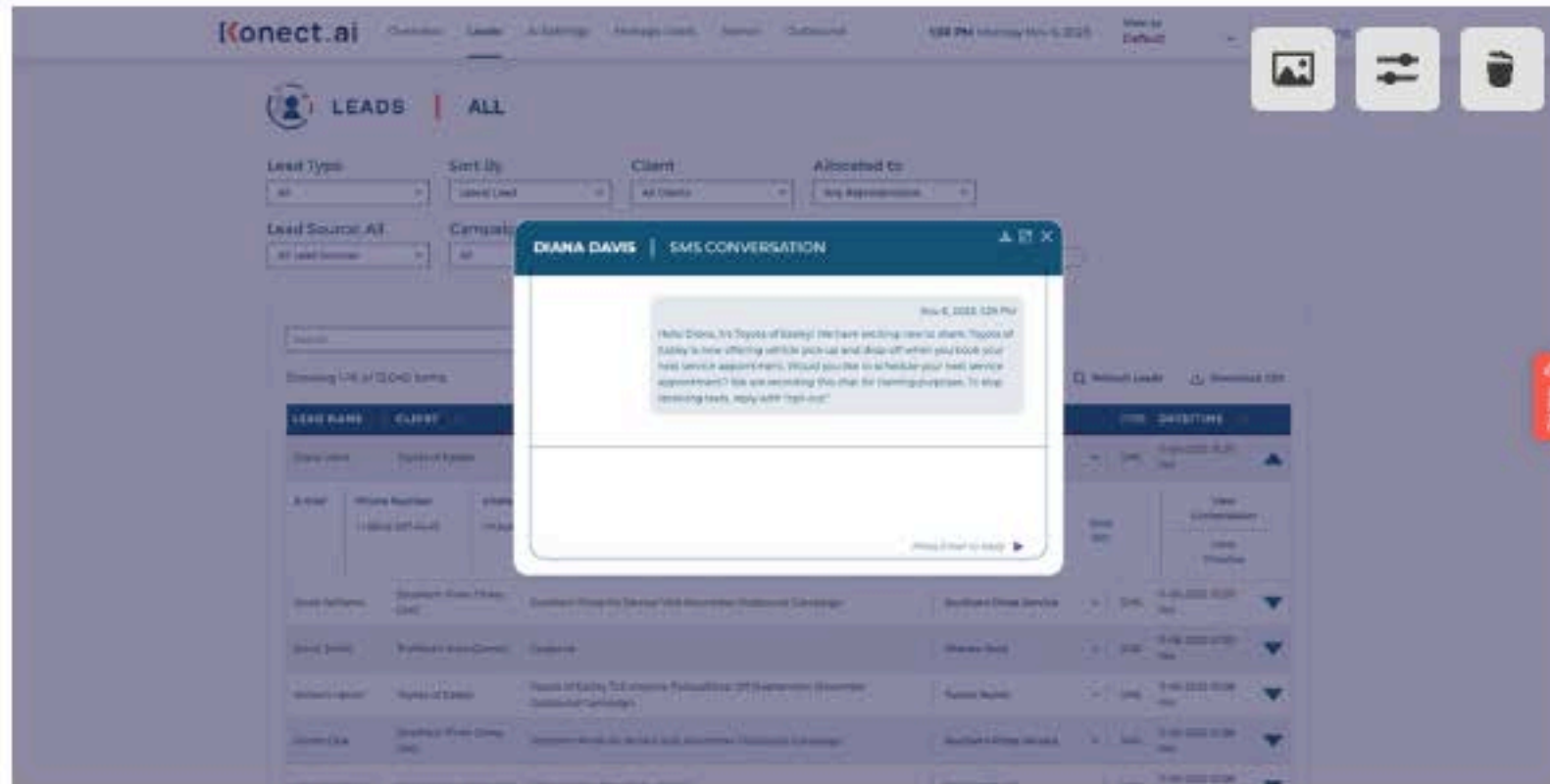
C At least once a week

D Very rarely

[Add choice](#)

3 → Is the overlay that opens when viewing conversations on the Leads page disruptive to your workflow?\*

*Description (optional)*



Y Yes

N No

4 → How important is it for you to see a complete list of leads that meet your specific filters on a scale of 1 to 10?\*

1 = I don't need to see all of the leads at the same time. I am usually looking for a single lead.

10 = Being able to see all leads will help me move through my workflow faster



	10 Twilio Call Status Test	Twilio Testing	Website	HK Twilio Rep 3	Jun 26, 2023				
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1	2	3	4	5	6	7	8	9	10
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5 → Is there anything more you would like to say about seeing the leads based on your filtered selection?\*

For example: Is there information more important than the ones shown by default? Would you like to see this same information, but in a different layout?

Type	Lead name ↑↓	Client ↑↓	Lead identifier ↑↓	Allocated to	Date/Time ↑↓
	10 Twilio Call Status Test	Twilio Testing	Website	HK Twilio Rep 3	Jun 26, 2023 4:21pm

Type your answer here...

Shift ⌘ + Enter ↵ to make a line break

OK ✓

press **Enter** ↵

6 → On a scale of 1-10, how important is it to be able to see all the relevant information of a single lead?\*

1 = it's not important

10 = It's extremely important

The screenshot displays a CRM lead record for '10 Twilio Call Status Test'. The record is assigned to 'HK Twilio Rep 3' and dated 'Jun 26, 2023 4:21pm'. The lead identifier is 'Website'. The interface is divided into several sections: 'E-mail' (harjinderk@konect.ai), 'Interested in' (2022 Mitsubishi Outlander SR), 'To' (+1 (604) 316-1472), and 'Call sentiment' (Positive). The 'Phone number' is +1 (604) 316-1472, and the 'From' number is +1 (236) 788-7766. The 'Recording status' is 'Completed' and the 'Call status' is 'Not answered'. The 'Call summary' contains placeholder text. On the right, there are action buttons: 'Bot conversation', 'View timeline', 'Notes', 'Download recording', and 'Stop bot'. An 'Include convo in demo' dropdown is set to 'Select package'.

1 2 3 4 5 6 7 8 9 10

7 → What are your thoughts on merging the SMS and Timeline features in the individual leads' information?\*

*Description (optional)*

Client ↓↑	Lead Identifier ↓↑	Allocated to	Date/time ↓↑
Telnyx Rose	Facebook	<input type="text"/>	11-29-2023 2:17 PM
Phone number +1 (281) 918-3083	Interested in mercedes	Include convo in demo <input type="text" value="Select a package"/>	<div style="border: 2px solid red; padding: 5px;"><a href="#">Bot conversation</a> <a href="#">View timeline</a> <a href="#">Notes</a> <a href="#">Stop bot</a></div>

Type your answer here...

8 → Is there anything more you would like to say about viewing detailed information on a single lead?

*Description (optional)*

Type your answer here...

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Shift ⬆ + Enter ↵ to make a line break



press **Enter** ↵

You're almost done 🎉 the second set of questions is based on the filtering options within the Leads page!

*Description (optional)*

**Continue**

press **Enter** ↵

9 → Within the leads page, which filters do you consider the most important out of the ones currently available?\*

1 = most important

7 = least important

Drag and drop to rank options

Sort by ⋮

Client ⋮

Allocated to ⋮

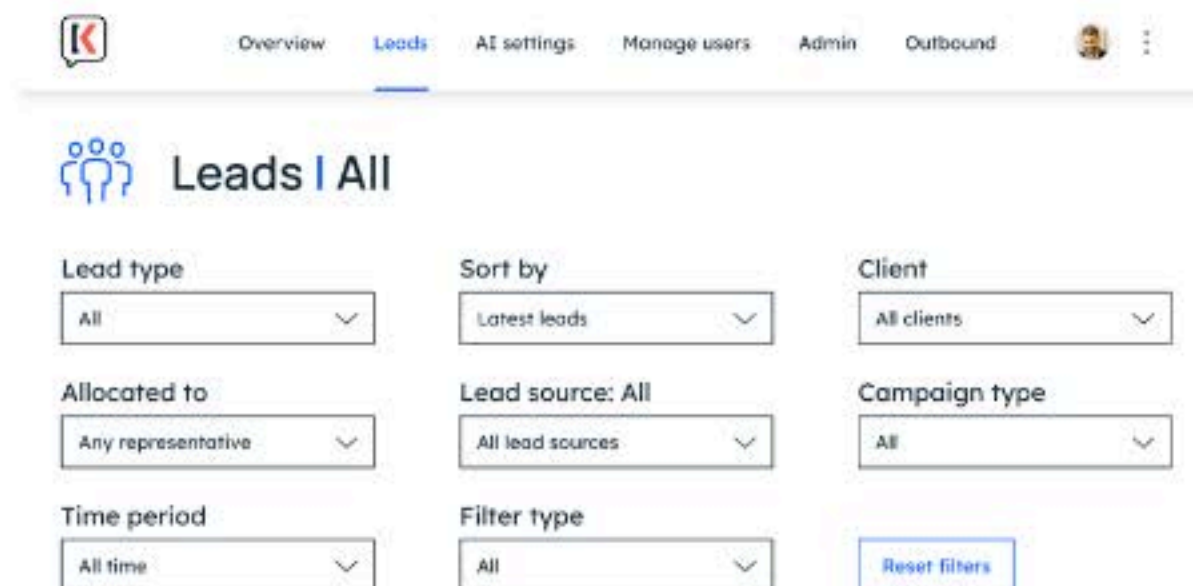
Lead source ⋮

Campaign type ⋮

Time period ⋮

Filter type ⋮

[Add choice](#)



The screenshot shows a CRM interface with a navigation bar at the top containing 'Overview', 'Leads', 'AI settings', 'Manage users', 'Admin', and 'Outbound'. The 'Leads' tab is active. Below the navigation bar, there is a header 'Leads | All' with a group icon. The main area contains several filter sections: 'Lead type' (All), 'Sort by' (Latest leads), 'Client' (All clients), 'Allocated to' (Any representative), 'Lead source: All' (All lead sources), 'Campaign type' (All), 'Time period' (All time), and 'Filter type' (All). A 'Reset filters' button is located at the bottom right of the filter area.

10 → Do you want to choose which filters are visible on the leads page or do you prefer all filters to be shown at once?\*

*Description (optional)*



Leads | All

Lead type All	Sort by Latest leads	Client All clients	Allocated to Any representative	Lead source: All All lead sources
Campaign type All	Time period All time	Filter type All	<a href="#">Reset filters</a>	

Yes

No

11 → Do you want more filtering or sorting options for leads? Or do you have any suggestions for changes to the current filters?\*

Please explain how the filter or sorting may pull up expected results.

Type your answer here...

Shift ⬆ + Enter ↵ to make a line break



press **Enter** ↵

12 → Is there a specific style or brand in mind that you would like the leads page to follow?\*

Feel free to include any links! You can always message links to us later if you come across them.

Type your answer here...

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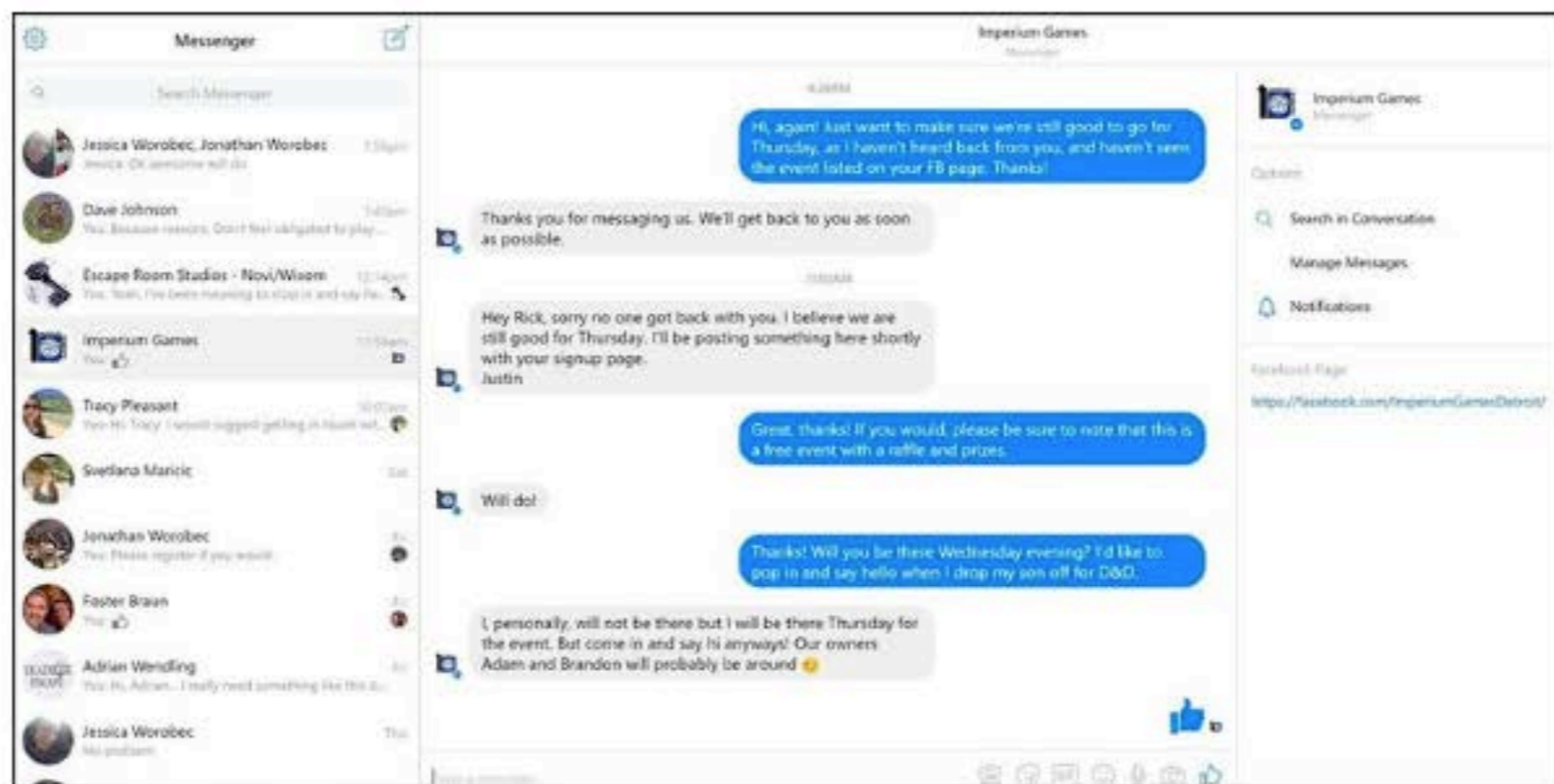
Shift ⬆ + Enter ↵ to make a line break



press **Enter** ↵

- 13 → If you use Facebook messenger, please describe your experience with the layout of Facebook Messenger and share your thoughts on how user-friendly it is.

If you don't use facebook messenger, feel free to skip this question.



Type your answer here...

Shift ⬆ + Enter ↵ to make a line break

OK ✓

press Enter ↵

14 → Lastly, would you be open to communicating with the Vancouver Design team for further questions or inquiries?\*

Agreeing means that we might contact you during our design process to clarify any recommendations you have replied within this survey (which is a good thing!). This will be done through Slack messages.

Y Yes

N No