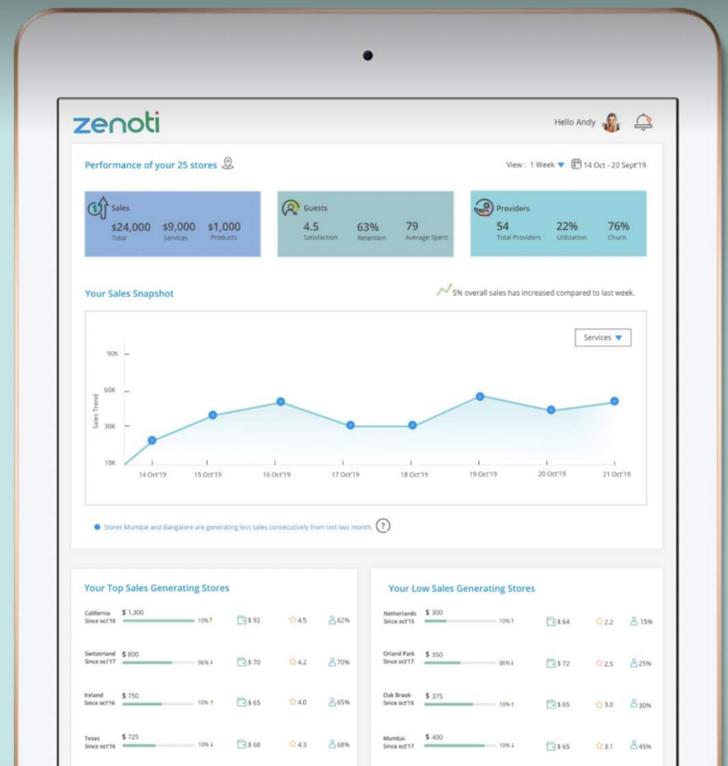


Zenoti Analytics Dashboard Revamp

Client Project At Divami Design Labs

User Research and Analysis/ Persona Creation/ Use Cases/
User Flow & Stories/ UI design/ Dev. constraints coordination



About Zenoti

Zenoti is a cloud-based business solution platform for Spas, Salons, and MedSpas of all sizes. Today, Zenoti is used by over 5,000 businesses in 32 countries across the globe. Customers are largely from the US, Australia, and New Zealand regions.

The Zenoti platform supports appointment scheduling, billing, marketing campaigns, inventory management, and employee management.

The Problem

Zenoti offers Analytics Express, which is essentially a set of dashboards around various elements of business, such as sales, traffic, guest feedback, etc to help business owners understand how they are doing with their business. Business owners can filter and drill down into data to understand root causes and get actionable insights.

However, **Analytics Express was not being adopted to its fullest potential by customers due to usability challenges.**

The Zenoti team spoke with its customers to understand the issues they faced with Analytics Express.

Following were some of the challenges gathered:

- Hard to discover features and capabilities.
- An overwhelming amount of info is presented in reports.
- Not knowing how to use the data and interpret the data.
- Lack of understanding of the metrics reported.
- Non-intuitive dashboards. Unable to navigate and arrive at root causes.
- Lots of tech jargon
- Usability issues (slow loading time, incomplete results are shown)

So the Zenoti team was looking to revamp this product to enable a great user experience.

My Role

- User Research and Analysis
- Persona Creation
- Use Cases
- User Flow & Stories
- UI design
- Dev. constraints coordination

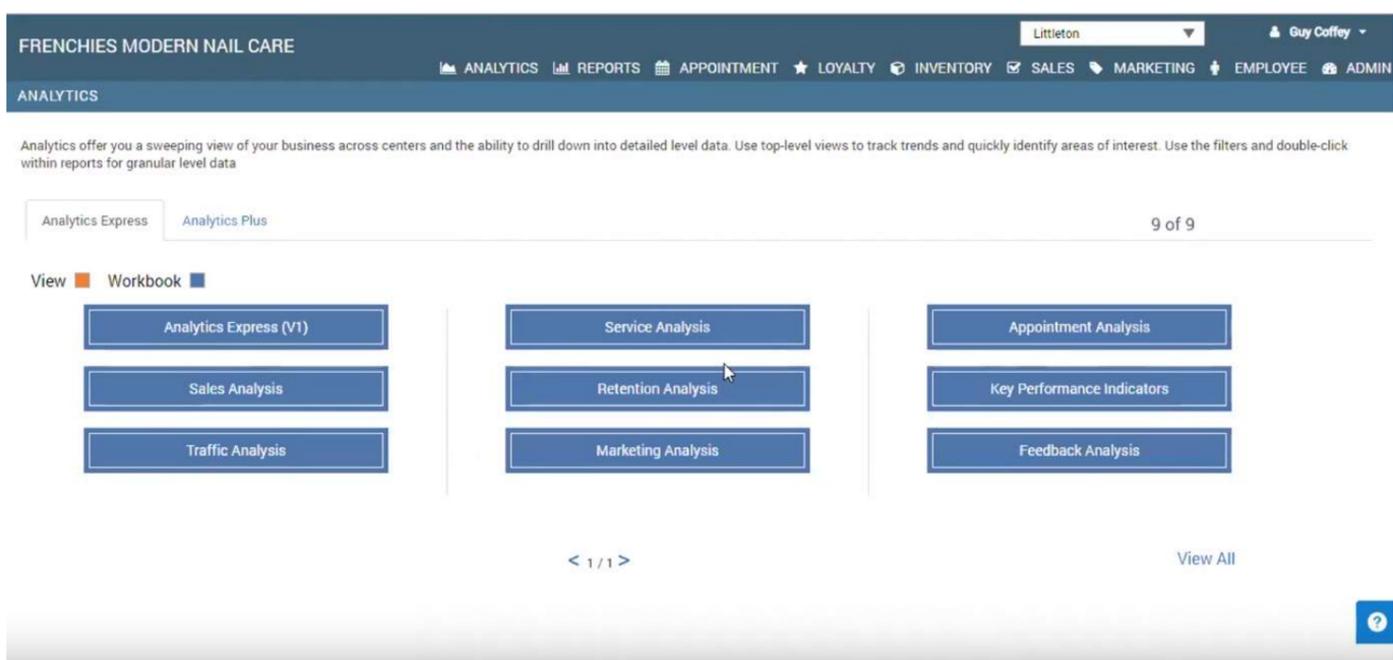
I was the primary UX Designer and also did the UI explorations.

Scope

As a **Proof-Of-Concept**, Zenoti asked us to redesign the master dashboard for the enterprise version of the Analytics Express. If the POC was successful, Zenoti would entrust us with redesigning the entire product.

The Challenge

- Redesign the dashboard to be **intuitive**. The old dashboard shown below was dull and unintuitive.
- Identify and **present the most important KPIs** for the owner. Owners **should be able to quickly get an insight into where they are doing well vs where they need to focus and improve upon**. They shouldn't have to dive deeper.
- Redesign the **graphs to be comprehensible** to the business users who aren't necessarily tech-savvy.
- Work with the Zenoti team to **make sure the design can be supported in Tableau** and is quick to load.



old dashboard

RESEARCH

User Research

Since a majority of the customers were based in the US, I scheduled calls, talked to a few salon owners in the US, and read articles and stories of salon owners in the US. My aim was to gather insights about the users as well as the problems they face running a salon. This is necessary to understand what information is most crucial to them.

So who is the user?



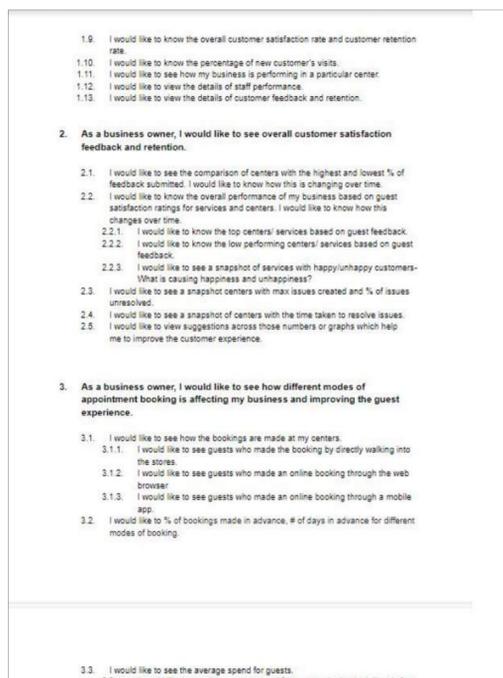
Amy, 41 years old, Salon owner/Entrepreneur

- Not technologically advanced
- Seeking to constantly improve salon experience for the clients at her salon
- Eager to grow the business
- Facing tough competition from other salons

The top pain points:

- Managing and motivating staff
- Acquiring new clients
- Retaining old clients
- Needs better understanding of the salon's cash flow

Use Cases



To get a better understanding of the **user requirements and goals**, I wrote down all the use cases (as seen in the snippet on the left)

View the complete use case document [here](#)

User Journey

I then mapped out the users' steps to see **how I could simplify their journey to reach the most important goals**, addressing the user's pain points (ref. persona)

This helped me **arrive at the following high-level KPIs** that were needed to reach the user goals and tackle the pain points:

- Overall Sales: Services+ Products
- Location-based sales (top 5, bottom 5)
- Customer Retention %
- No. of visitors (overall, per hour)
- No. of new customers
- Overall and Avg rating/feedback

All these would require daily, weekly, and monthly views.

DESIGN

Wireframing

Based on these studies, I had an understanding of what the high-level KPIs were and set out to construct wireframes.

At this phase of the design process, **early user feedback was crucial** to eliminate pain points and enhance usability and existing features.

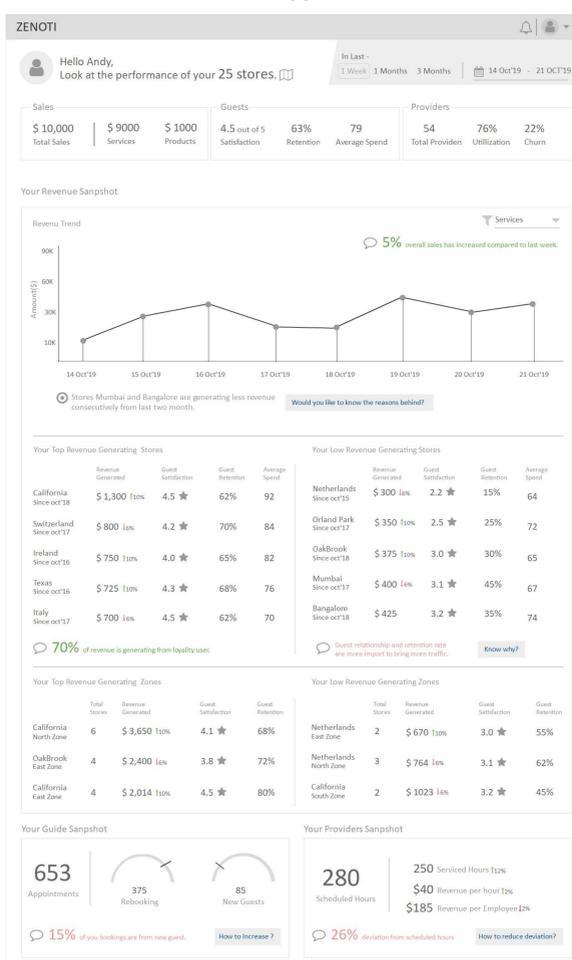
A few solutions implemented:

- Using more graphs to show information visually, to reduce information overload
- Giving the user cues and alerts to make sure they are not lost and have full transparency in navigation
- Going with a more approachable and empathizing tone in terms of UX writing

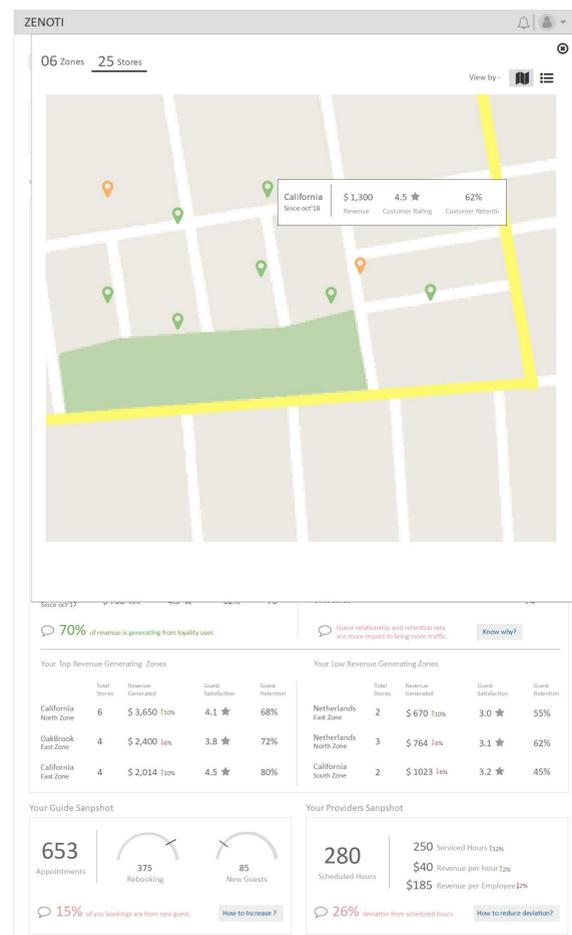
I presented the Zenoti team with **two options**:

1. one **with AI suggestions** (for giving the user better cues), and
2. one **without** (in case it wasn't possible to implement in tableau)

1. AI suggestions



2. Without AI suggestions



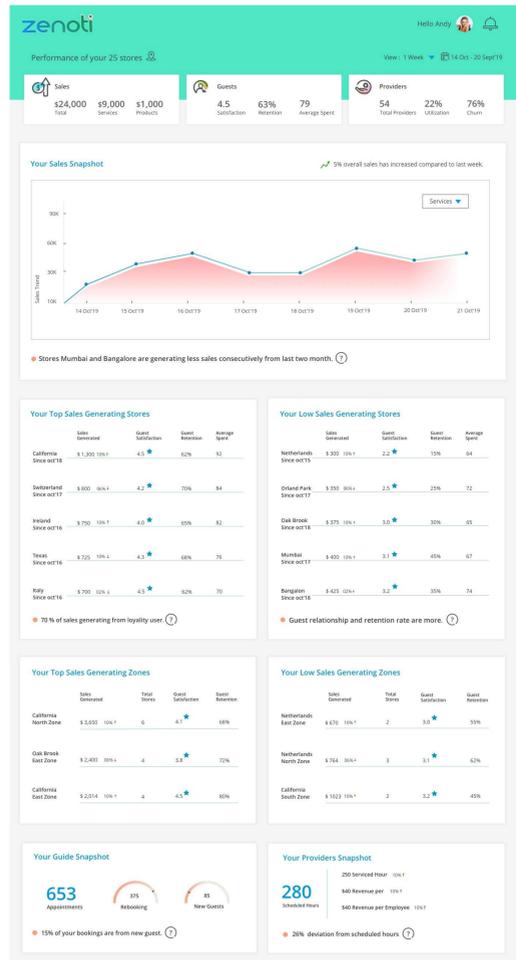
UI Design

After getting the wireframes approved by the client, I moved on to the UI.

Went with a clean minimal theme (since there was so much information, I did not want distractions) while sticking with the brand colors.

2 variations are shown below

Variation 1



Variation 2



 **Successful Proof Of Concept**

Project Acquired!

Takeaways

- The user is at the center of every product and this project pushed me to ensure I understand who my target audience is, their age bracket, the problems they might be facing, their lifestyle, and more.
- The importance of creating a persona and understanding and researching the persona you are designing for.
- Always check and collaborate with the developers to ensure an idea is feasible from a development perspective.