

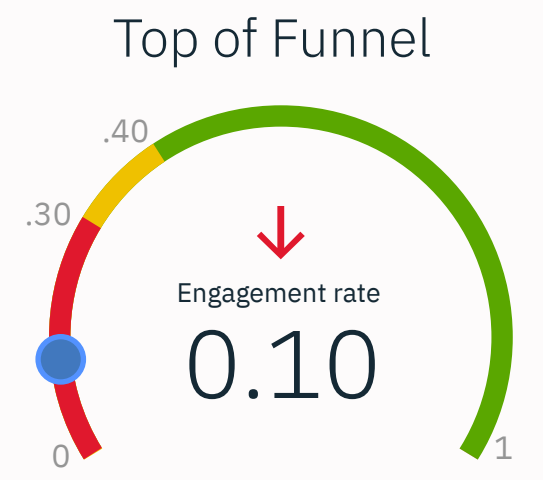
Digital Offering Funnel

Data as of MM/DD/YYYY

MM/DD/YY - MM/DD/YY

Digital Offering Funnel NPS

DIGITAL FUNNEL



Getting Started

Click the global filter icon to display the filter menu for the dashboard.



Click the local filter icon in sections that have additional filters available.



To remove a filter use the global or local filter menu or click the selected filter.



Bottom of Funnel



ORDERS AND YTY GROWTH WITHOUT RENEWALS

	Touchless (C)		Seller assist (B)		QTM (B)		3PM (X)		OUTBOUND (Z)	
	QTD orders	YtY Growth	QTD orders	YtY Growth	QTD orders	YtY Growth	QTD orders	YtY Growth	QTD orders	YtY Growth

Notes

PROJECT: Digital Offering Funnel
 DOCUMENT: Wireframes
 DATE: 2/24/2019
 FILE: DigitalOfferingFunnel_FunctionalAnnotations_v6.pdf
 AUTHOR: Melanie Klein - UX Architect - melanie@us.ibm.com

SCREEN

DIGITAL OFFERING FUNNEL - GETTING STARTED MODAL

- 1 GETTING STARTED MODAL**
 This modal will display the first time a user comes to the Digital Offering Funnel. To close the modal the user can click the "x" in the top right or click outside the modal.

This information will also be added to the Help box page.

Digital Offering Funnel

Data as of MM/DD/YYYY

5 ?

Home

2 MM/DD/YY - MM/DD/YY

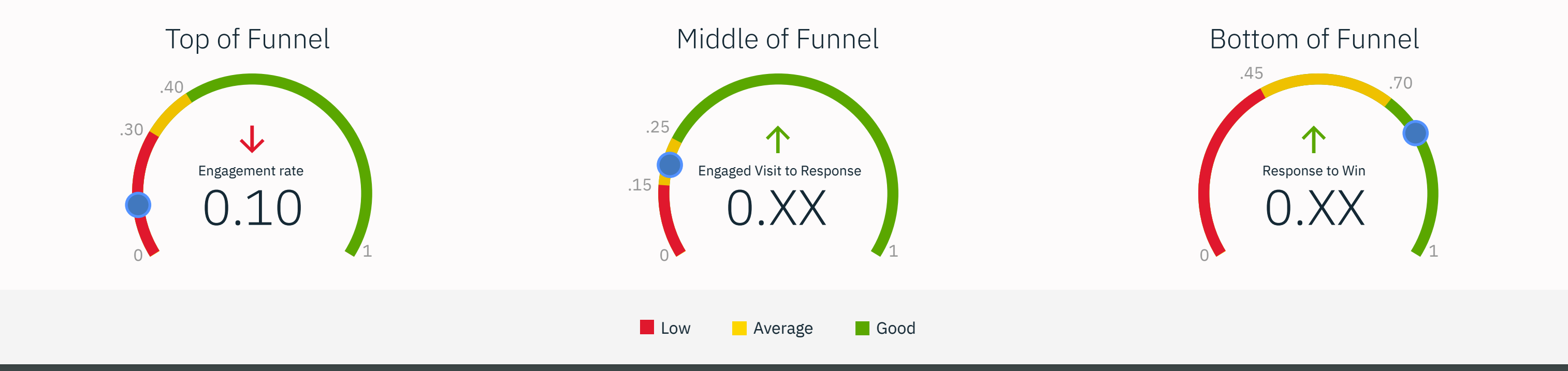
4

Reports

3 Digital Offering Funnel NPS

Education

DIGITAL FUNNEL 18



QTD ORDERS AND YTY GROWTH WITHOUT RENEWALS 1

	Touchless (C)		Seller assist (B)		QTM (B)		3PM (X)		OUTBOUND (Z)	
	QTD orders	YTY Growth	QTD orders	YTY Growth	QTD orders	YTY Growth	QTD orders	YTY Growth	QTD orders	YTY Growth
Conitive Solutions	1,234	123%	1,234	123%	1,234	123%	1,234	123%	1,234	123%
Hybrid Cloud	1,234	123%	1,234	123%	1,234	123%	1,234	123%	1,234	123%
Systems	1,234	-123%	1,234	-123%	1,234	-123%	1,234	-123%	1,234	-123%
W&CP	1,234	23%	1,234	23%	1,234	23%	1,234	23%	1,234	23%

FUNNEL PERFORMANCE KPIS AND RATES 3

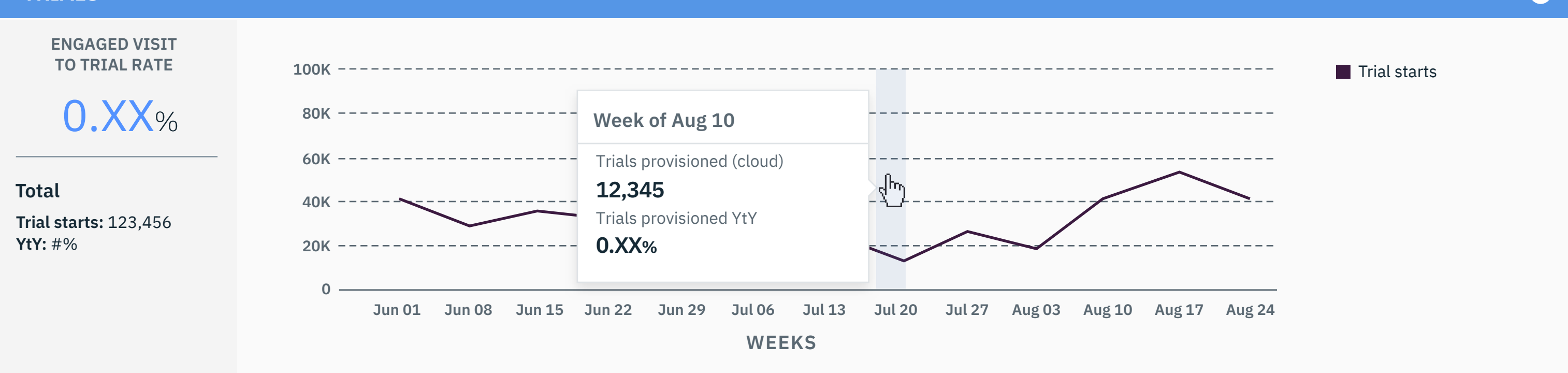
	Visits (YY)	Eng. Visits (YY)	Eng. Rate	Eng. Visit to Response Rate	Trial Start/YTY	Eng. Visit to Trial Start Rate	Trial Form Completion Rate	Response to Win Rate	Digital OI (Leads YY)	Digital OI (Wins YY)
Conitive Solutions	123%	123%	123%	123%	123%	123%	123%	123%	123%	123%
Hybrid Cloud	123%	123%	123%	123%	123%	123%	123%	123%	123%	123%
Systems	-123%	-123%	-123%	-123%	-123%	-123%	-123%	-123%	-123%	-123%
W&CP	23%	23%	23%	23%	23%	23%	23%	23%	23%	23%

All Product Pages 9

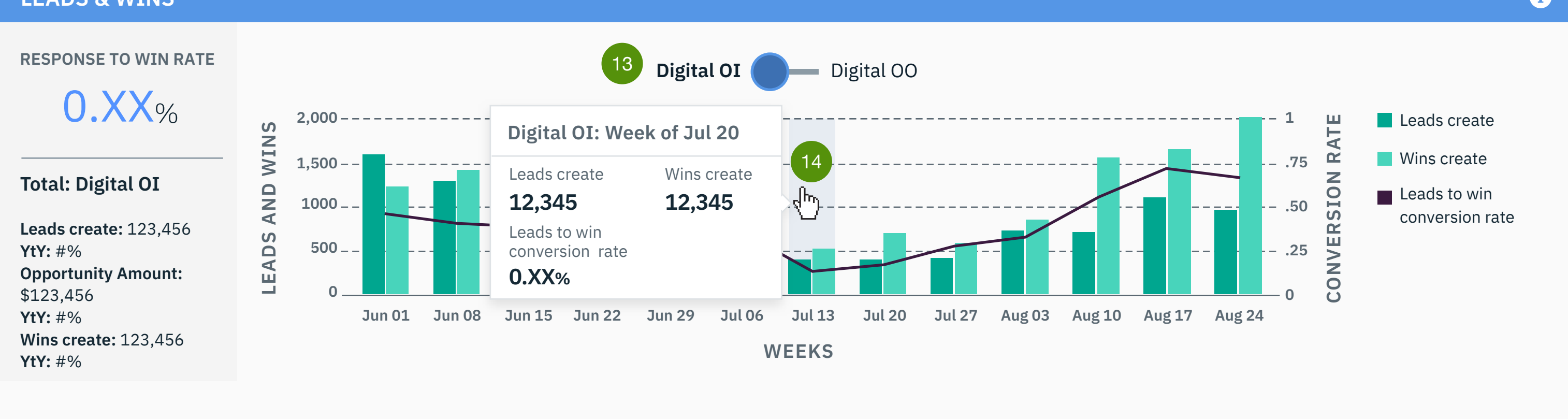
VISITS & RESPONSES 3



TRIALS 3



LEADS & WINS 3



ORDERS 3



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SCREEN DIGITAL OFFERING FUNNEL - DEFAULT

1 DATA AS OF MM/DD/YYYY
Last date current data was updated.

2 SELECTED GLOBAL FILTERS
This area shows the selected Global Filters using it as a title of the report. When the page first loads the default global filters are set to All and the date is the past 13 weeks. Filters that are set to "All" do not display. This is the same as the current funnel functionality.

3 TABS
Digital Offering Funnel and NPS are tabs.

4 GLOBAL FILTER ICON
This is the Global Filter icon. There should be a tooltip on rollover that says "Global Filters". Clicking this icon will open the global filter layer. This is a layer over the page - it does not push the page over. The global filters are for both the Digital Offering Funnel and NPS tabs.

5 UTILITY ICONS - HELP, EXPORT, FULLSCREEN
These 3 icons from left to right are Help, Export, and Fullscreen. The fullscreen (maximize) icon is pushed to the right so it's in the pearl wrapper. Each should have a tooltip with their label. Help - this will link to the current box file the live funnel help is linking to. David will update the file for the new funnel. <https://ibm.ent.box.com/s/kw2tam3q9r816zh6invf5h3rg5nclftb> Export - options should be same as current funnel - Excel, PDF, PPT, Image. Fullscreen - This will open the Digital Offering Funnel in it's own window and break it out of the pearl wrapper.

6 DIGITAL FUNNEL (SPEEDOMETER) SECTION
Each gauge shows decimals from 0 to 1. Arrows - the red/green arrows in the gauges will display if the date range is a quarter only and the arrows are a comparison of if we are up or down from the previous quarter. So the green up arrow will display if we are up from the previous quarter and the red arrow will display if we are down. David to define the following:
- data for top, middle, and bottom of funnel
- range data for what is red, yellow, and green for each (top, middle, and bottom are all different)

7 ORDERS AND YTY GROWTH WITHOUT RENEWALS
This table is displaying the default data before any filters are selected (except date). The default data is showing just the Business Units and their totals. See the "Digital Offering Funnel - QTD Orders and Funnel Performance Tables" Annotations page for this table after filters are selected.

8 FUNNEL PERFORMANCE KPIS AND RATES
This table is displaying the default data before any filters are selected (except date). See the "Digital Offering Funnel - QTD Orders and Funnel Performance Tables" Annotations page for this table after filters are selected.

9 VISITS & RESPONSES - SELECTED LOCAL FILTERS
This is the only section on the page for now that has local filters which are additional filters from the global ones as they are only specific to this section. "All product pages" is the default selected local filter. The local filters will have the same rollover with the strikethrough line and the x indicating click to remove the filter. Since the product page filter is a radio button where one or the other (Primary product page) must be selected, clicking the filter would just select the other option and display it there.

10 NUMBERS/CONVERSION RATE - CHART SLIDER
This slider functionality is a way to switch from the "Numbers" chart to the "Conversion rates" chart which are two different charts that display in the same area. Numbers is the default chart to display and the chart the slider is on should be bolded to show it's selected. See "Digital Offering Funnel - Slider Charts" Annotations page for the Conversion rate chart.

11 LOCAL FILTER
This is the local filter icon for the Visits & Responses section. This icon should have a tooltip on rollover that says "Local Filters".
Note: Going forward other sections on the page will have local filters so the local filter icon will be added for their sections. If the local filters have more options then can be displayed in row they will wrap.

12 CHART ROLLOVER TOOLTIP AND HIGHLIGHTED WEEK
On rollover the x axis week will be highlighted by the light gray vertical bar spanning the total height of the chart. The tooltip will display showing the data for all lines represented in the chart for that week.

13 DIGITAL OI/DIGITAL OO - CHART SLIDER
Same slider functionality as note 10 above. Digital OI is the default chart to display. Switching the slider to Digital OO will display the Digital OO chart. See "Digital Offering Funnel - Slider Charts" Annotations page for the Digital OO chart.

14 CHART ROLLOVER TOOLTIP AND HIGHLIGHTED WEEK (bar and line chart)
Same functionality as note 12 above.

15 ORDERS AND YTY GROWTH WITHOUT RENEWALS - NUMBERS % AND NEGATIVE
Data in this table is all % so the percent sign should be next to each number. If a number is negative, the number should have a negative red minus sign in front of it.

16 FUNNEL PERFORMANCE KPIS AND RATES - NUMBERS % AND NEGATIVE
Same as note 15 above.

17 IBM PEARL LINK
This links back to the Pearl homepage and leaves the DBG Pearl wrapper.

18 i ICONS
These icons will be in the upper right of each section. When clicked they will display a tooltip with definitions for that section.

Notes

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SCREEN

DIGITAL OFFERING FUNNEL - i ICON TOOLTIPS

- 1 i ICON TOOLTIP**
This shows the tooltip that will be in the top right of each section with placeholder text.

1

QTD ORDERS AND YTY GROWTH WITHOUT RENEWALS

i

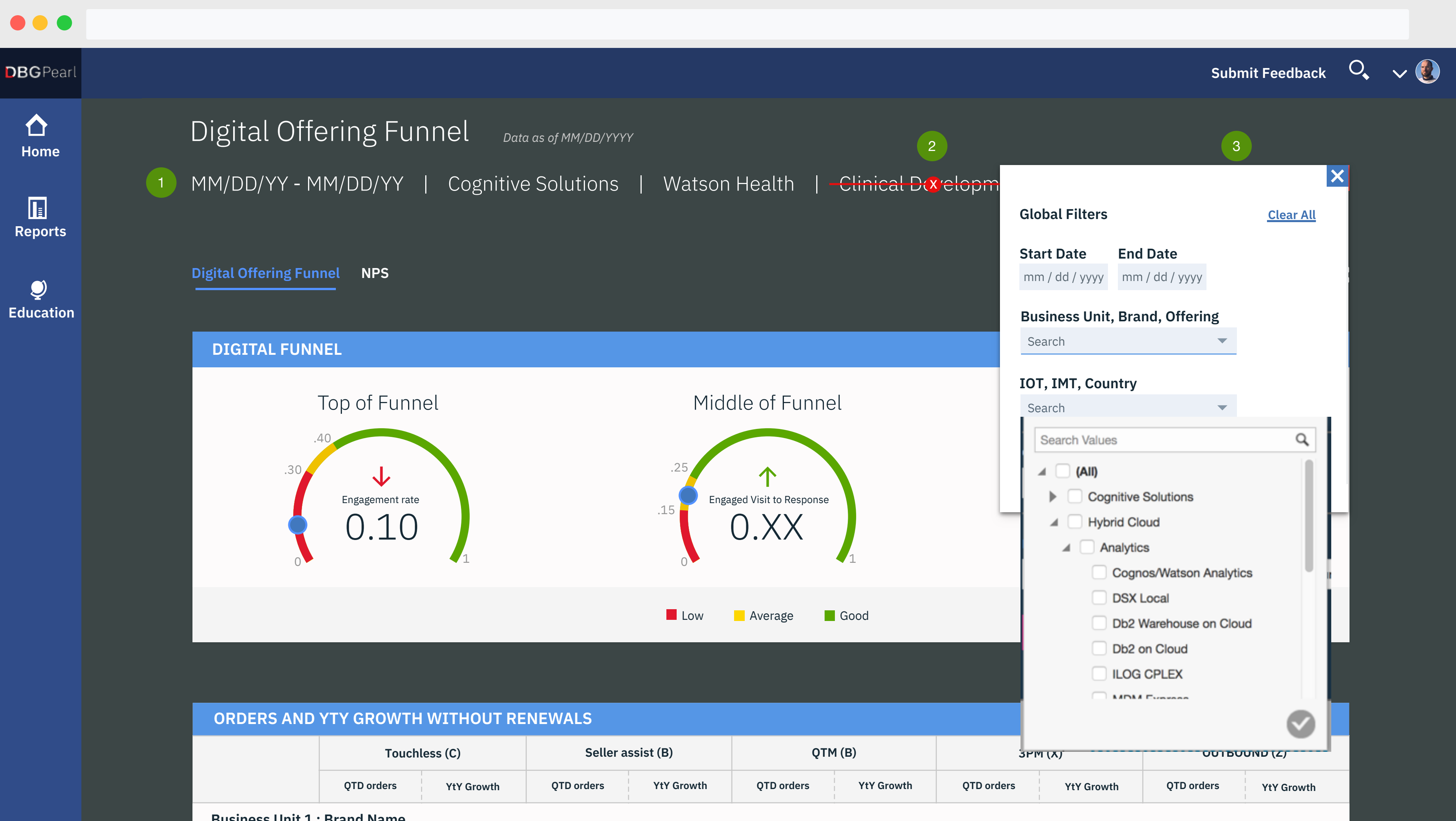
	Touchless (C)		Seller assist (B)		QTM (B)		3P
	QTD orders	YtY Growth	QTD orders	YtY Growth	QTD orders	YtY Growth	QTD orders
Conitive Solutions	1,234	123%	1,234	123%	1,234	123%	1,234
Hybrid Cloud	1,234	123%	1,234	123%	1,234	123%	1,234
Systems	1,234	-123%	1,234	-123%	1,234	-123%	1,234
W&CP	1,234	23%	1,234	23%	1,234	23%	1,234

Lorem ipsum

Absolutely no pressure. You are just a whisper floating across a mountain. In nature, dead trees are just as normal as live trees. Now we'll take the almighty fan brush.

Lorem ipsum

Even trees need a friend. We all need friends. Let's have a nice tree right here. You can get away with a lot.

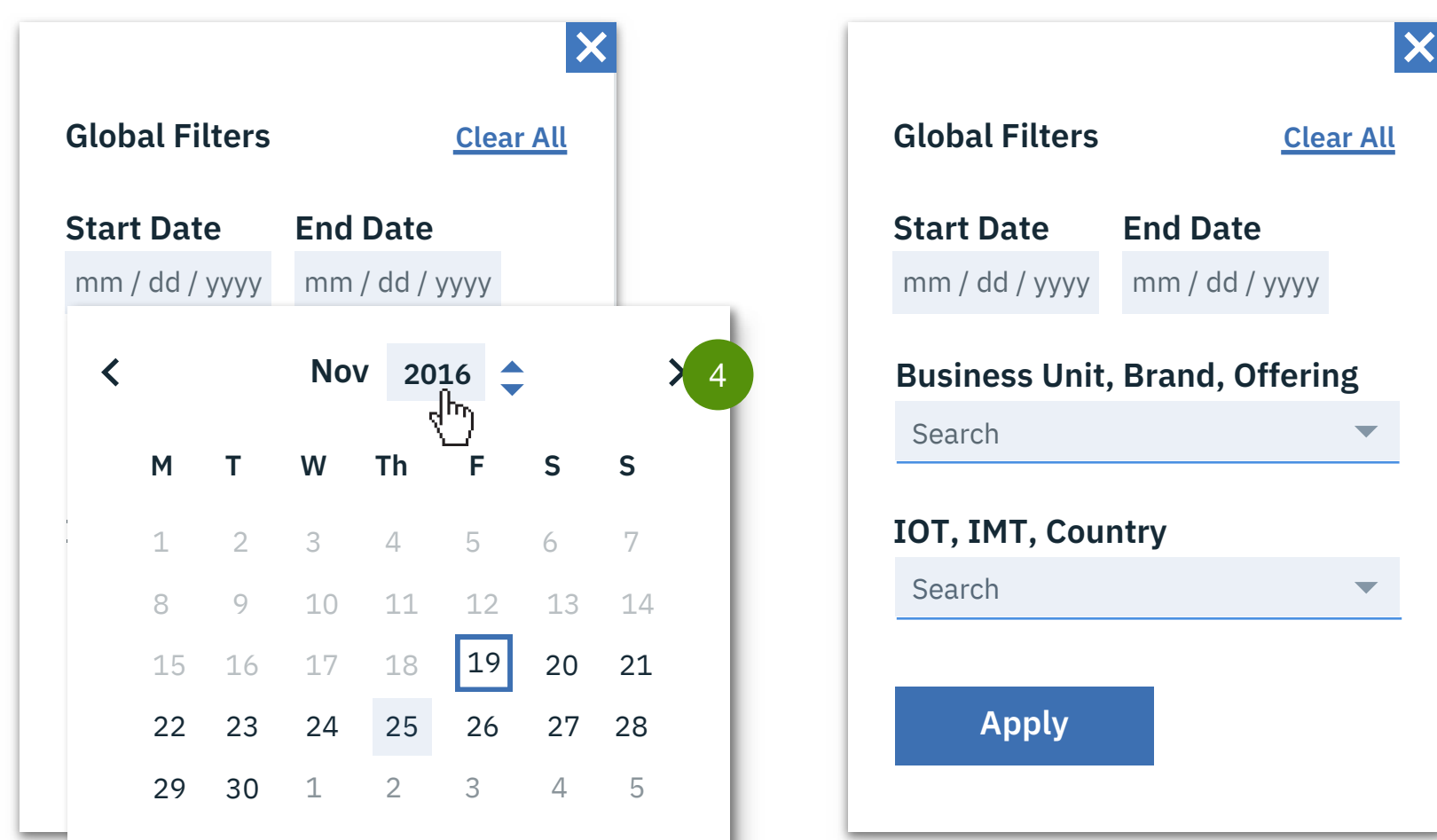


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SCREEN
 DIGITAL OFFERING FUNNEL - GLOBAL FILTERS

- 1 **SELECTED GLOBAL FILTERS**
 As each global filter is selected it will display in this area divided by the |. This line will wrap if all the selections cannot fit on one line.
- 2 **ROLLOVER CLOSE**
 Rolling over each selected global filter will display a crossed out X over the filter. Clicking this will remove that filter and set it back to All.
Date - if the user rolls over the date and clicks to close it, the Global Filters menu should open with the previous selected Start Date and End Date autofilled so the user can enter a new date range.
- 3 **GLOBAL FILTER MENU OVERLAY**
 This menu will display in a layer over the page when the red global filter icon is clicked.
X - clicking the X will close the menu. Clicking outside of the menu will also close the menu
Clear All - will clear all the selected filters and return all to their default state.
Start Date and End Date - the default date will be autofilled with Start Date being 13 weeks prior to today's date which is the End Date. Double check this with David. Clicking in either of these fields will display the carbon calendar functionality. This will be detailed below. These two fields must always be filled out so if the user tries to leave it blank the dates should automatically go back to the default dates.
Business Unit, Brand, Offering, Geo (IOT), and Market (IMT) - clicking in each dropdown will display the list of options depending on what other filters have been selected. The default option for all these filters is All. All will be the first option listed. Typing into the Search area of each dropdown can also search for the typed entry. As the user selects filters all the other filters will reload and display options related to the selected filters (i.e. if the user goes directly to the Offering filter and selects "DSX Local" which is the Brand:Analytics and the Business Unit: Hybrid Cloud" then those filters will reload with that brand and business unit selected. The same if multiple items are selected.
Apply - clicking this button will close the global filters menu and reload the page to show the data for the selected filters.



- 4 **START DATE AND END DATE CALENDAR**
***Please see Carbon website for complete calendar functionality - <http://www.carbondesignsystem.com/components/date-picker/code>.**
 Clicking in either field will display the calendar for the user to select a date. The date already in the field is outlined in blue and there is a rollover light blue highlight for all items in the calendar. Also rolling over the year displays up and down carots to the right to move to the previous or next year. The user can also directly type in the year.
- 5 **DROPDOWN MULTISELECT FILTER - WITH SEARCH**
***Please see Carbon website for dropdown style and functionality - <http://www.carbondesignsystem.com/components/dropdown/code> - Filter Dropdown component.**

"All" is the first and default option for each dropdown. User can select multiple options and deselect by clicking an option that is checked.
Search - the user can also directly type in a search term and select their option(s) from there.
 **See carbon website url above for search not found and searching and selecting multiple options.

TBD light blue highlight rollover for each option - talk to Michael.
 TBD the vertical height of the dropdown before a scroll is needed.



Digital Offering Funnel

Data as of MM/DD/YYYY

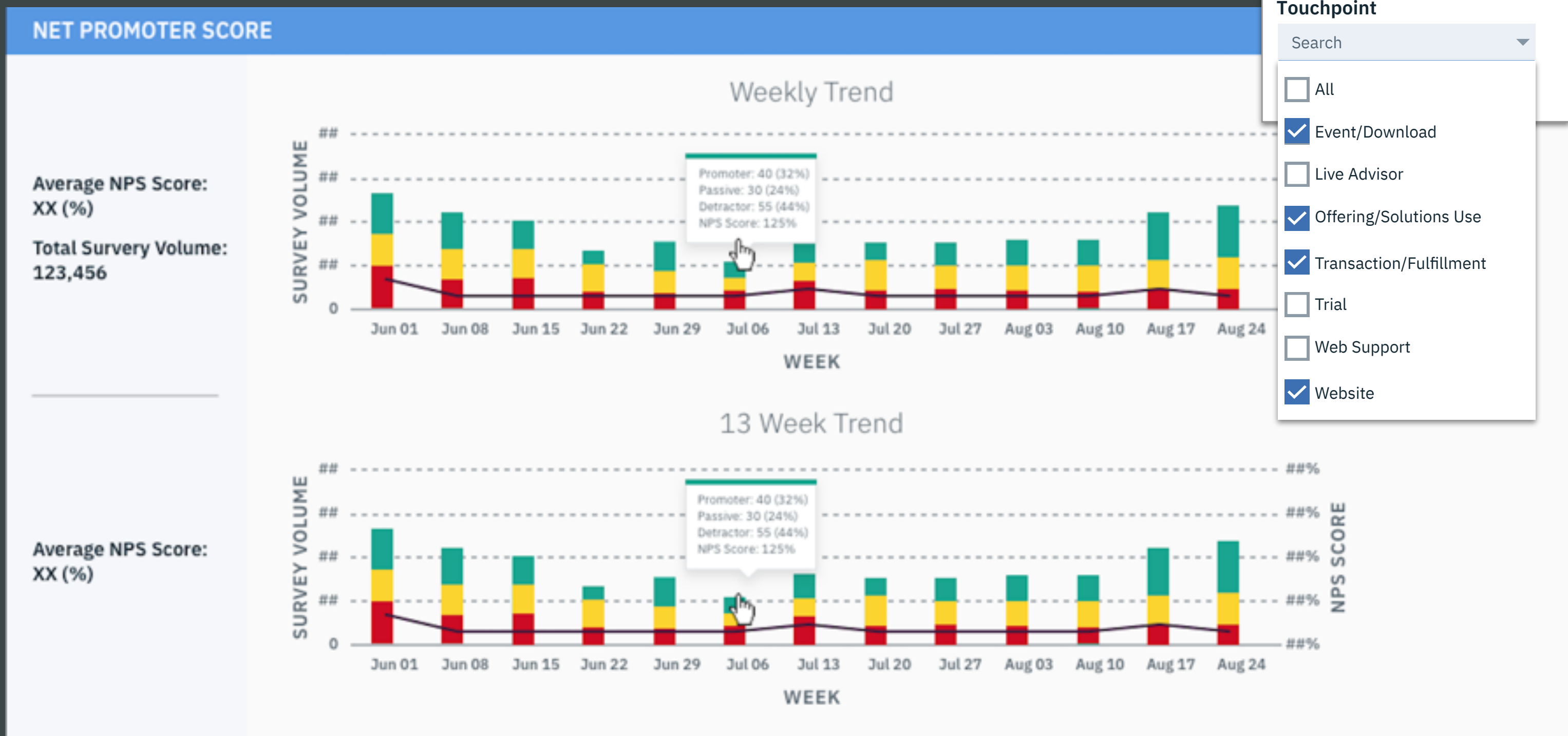


2 MM/DD/YY - MM/DD/YY | Cognitive Solutions | Watson Health | Clinical Development | EU(Benelux)



Digital Offering Funnel NPS 1

4 Event/Download | ~~Offering/Solutions Use~~ 6 | Transaction/Fulfillment | Website



Notes

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SCREEN

DIGITAL OFFERING FUNNEL - NPS

- 1 DEFAULT PAGE**
The default data for this page is "Touchpoint"
- 1 NPS TAB**
NPS tab is selected.
- 2 GLOBAL FILTERS**
The global filters are the same for both tabs - Digital Offering Funnel and NPS.
- 3 GLOBAL FILTER**
Functions the same as on the Digital Offering Funnel tab. Filter changes made to global filters apply to both tabs.
- 4 NET PROMOTER SCORE - SELECTED LOCAL FILTERS**
This is where the selected local filters will display. "All" does not display.
- 5 LOCAL FILTER - WITH SEARCH**
Default option is "All". Touchpoint multiselect dropdown is the only local filter for now but more will be added shortly.
- 6 ROLLOVER CLOSE**
Same as global filter rollover and click to close. See "Digital Offering Funnel - Global filters" page for description.

All Product P ages 2

VISITS & RESPONSES

ENGAGEMENT RATE

0.XX%

Total

Visits: 123,456

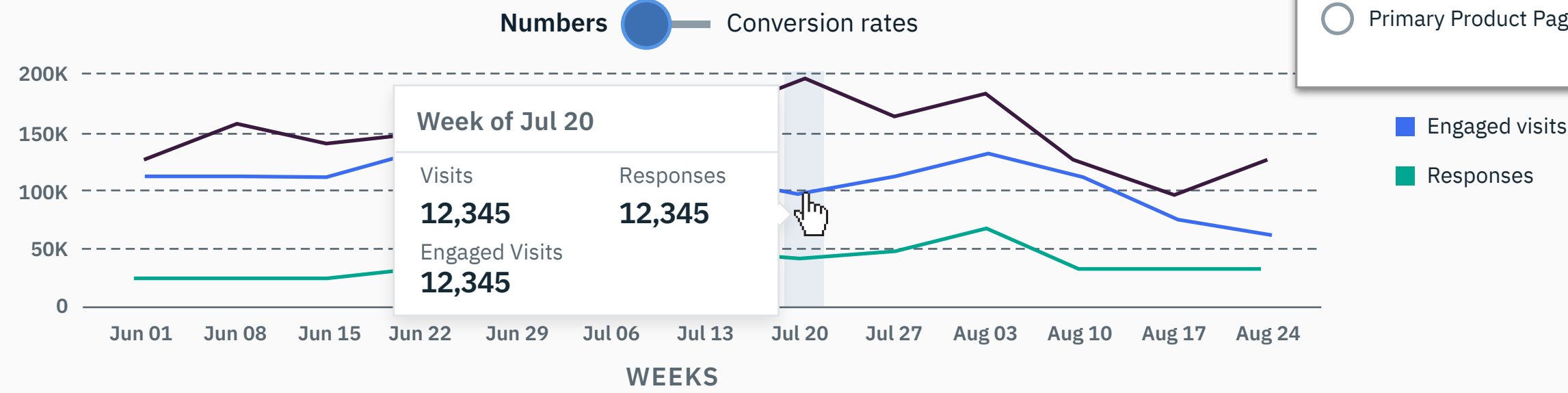
YtY: #%

Engaged vists: 123,456

YtY: #%

Responses: 123,456

YtY: #%



Product Pages 3

All Product Pages

Primary Product Page(s)

Notes

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SCREEN

DIGITAL OFFERING FUNNEL - LOCAL FILTERS

1 LOCAL FILTER MENU

Clicking the local filter icon will display a menu of local filters only for this section of the page. As of now the product page filter is the only local one but more will be added in future iterations. "All Product Pages" is the default.

2 VISITS & RESPONSES - SELECTED LOCAL FILTERS

See "Digital Offering Funnel - Default" Annotations page for description.

3 LOCAL FILTER MENU

This menu will display when the local filter icon is clicked on. As of now Product Pages is the only filter but more will be added shortly.

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SCREEN

DIGITAL OFFERING FUNNEL - QTD ORDERS AND FUNNEL PERFORMANCE TABLES

Note: Ignore the green “+” symbol in front of some of the numbers. We will not be including that.

1 ORDERS AND YTY GROWTH WITHOUT RENEWALS

This table is showing filter results if more than one Business Unit or Brand is selected. A header row with the Business Unit: Brand will display above each group of Offering rows within that Business Unit/Brand. This block of grouped rows will be repeated for each different Business Unit and Brand.

The header row does not need to display if only one Business Unit and Brand is selected.

2 VISITS & RESPONSES - SELECTED LOCAL FILTERS

Row display is the same functionality as in *note 1* above.

1

ORDERS AND YTY GROWTH WITHOUT RENEWALS



	Touchless (C)		Seller assist (B)		QTM (B)		3PM (X)		OUTBOUND (Z)	
	QTD orders	YtY Growth	QTD orders	YtY Growth	QTD orders	YtY Growth	QTD orders	YtY Growth	QTD orders	YtY Growth
Business Unit 1 : Brand Name										
Offering 1	1,234	+123%	1,234	+123%	1,234	+123%	1,234	+XXX%	1,234	-123%
Business Unit 2 : Brand Name										
Offering 2	1,234	+123%	1,234	+123%	1,234	+123%	1,234	+XXX%	1,234	-123%
Offering 3	1,234	+123%	1,234	+123%	1,234	+123%	1,234	+XXX%	1,234	-123%

2

FUNNEL PERFORMANCE KPIS AND RATES



	Visits (YtY)	Eng. Visits (YtY)	Eng. Rate	Eng. Visit to Response Rate	Trial Start/YtY	Eng. Visit to Trial Start Rate	Trial Form Completion Rate	Response to Win Rate	Digital OI (Leads YtY)	Digital OI (Wins YtY)
Business Unit 1: Brand Name										
Offering 1	1,234	+123%	1,234	+123%	1,234	+123%	1,234	+XXX%	1,234	-123%
Business Unit 2: Brand Name										
Offering 2	1,234	+123%	1,234	+123%	1,234	+123%	1,234	+XXX%	1,234	-123%
Offering 3	1,234	+123%	1,234	+123%	1,234	+123%	1,234	+XXX%	1,234	-123%

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SCREEN

DIGITAL OFFERING FUNNEL - SLIDER CHARTS

1 VISITS & RESPONSES - CONVERSION RATE CHART

This is showing the "Conversion rates" chart in the "Visits & Responses" area when the chart slider is moved to the Conversion rates side.

2 VISITS & RESPONSES - CHART SLIDER ON CONVERSION RATES

Chart slider is on the "Conversion rates" side and Conversion rates is bolded.

3 LEADS & WINS - DIGITAL OO CHARTS

This is showing the "Digital OO" chart in the "Leads & Wins" area when the chart slider is moved to the Digital OO side.

4 LEADS & WINS - CHART SLIDER ON DIGITAL OO

Chart slider is on the "Digital OO" side and Digital OO is bolded.

1

VISITS & RESPONSES

i

AVG. ENGAGEMENT RATE

0.XX%

Total

Visits: 123,456

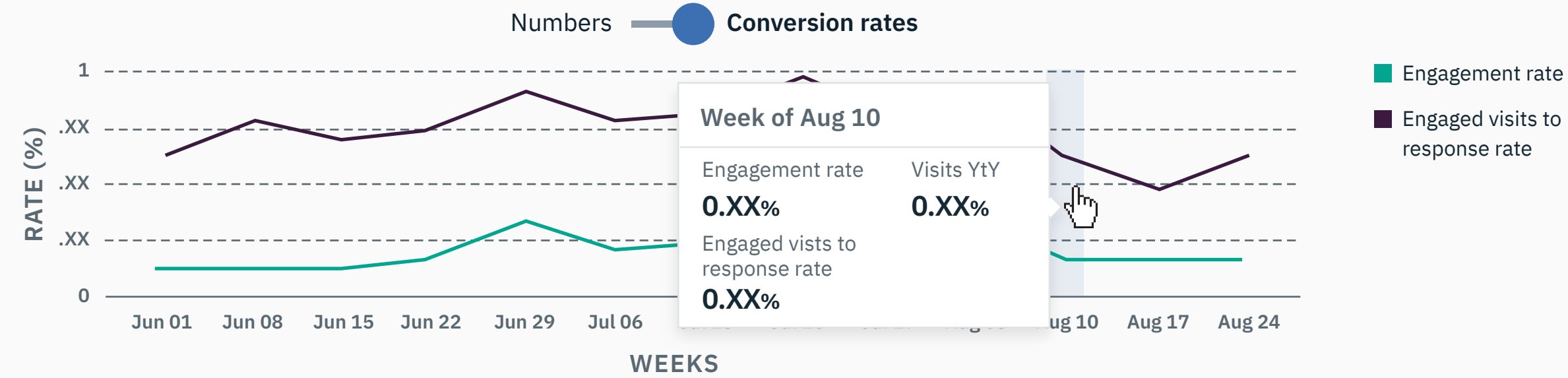
YtY: #%

Engaged vists: 123,456

YtY: #%

Responses: 123,456

YtY: #%



3

LEADS & WINS

i

RESPONSE TO WIN RATE

0.XX%

Total: Digital OI

Leads create: 123,456

YtY: #%

Opportunity Amount: \$123,456

YtY: #%

Wins create: 123,456

YtY: #%

