

Design Cycle One: Round One Interviews

Introduction

The goal of this research project was to help us identify what the characteristics of a Minimum Loveable Product (MLP) are, and which part of our target market would be most likely to appreciate it. The MLP should be the smallest version of the product that a specific group of people will find loveable, as per our current draft Product Strategy. It is possible that the current product is too small to be loved and will need to be expanded. The product team intend to take these findings and mix them with other product considerations to arrive at some MLP designs for further testing in round two. The overarching process is called “The Design Cycle”.

The research methodology involved extensive interviews with the entire sales and success team, as well as the engineering team, ensuring a holistic perspective on the ideal target market and the platform's functionality and usability. To give the engineering team additional context with the product, they were given a challenge of different tasks to perform using the app aimed at enhancing their familiarity and understanding with it. The engineers recorded their undertaking of the challenge to provide additional insight into their use of the app.

During the interviews, a wide range of questions were posed, covering the entirety of the product as well as specific features. These inquiries were carefully crafted, taking into consideration the valuable insights gathered from the feature requests board, complaints from customers and other relevant insights. By incorporating specific requests into our line of questioning, we sought to gather feedback and suggestions directly from the teams, providing an opportunity to address user needs and improve user experience.

Target Market

Based on the responses provided, it can be concluded that there are users who have a positive sentiment towards the platform, although none of them express love for it as it stands, indeed the set of people who even “like” it is small. Given that, we asked about the “promise of the product” instead.

- 1. Users who appreciate the ‘promise’ of the product:**

All sales and success mention that users like the concept or vision behind the platform. They believe in the potential value it offers but feel that the current experience or execution falls short of their expectations.

- 2. Preference for smaller to medium-sized brokers (1-5 Brokers):**

All sales and success mention that smaller brokers (1-5 brokers) are more likely to appreciate the app or have a positive experience with it. The goal is to provide a solution that eliminates the need for brokers to go to their internal marketing team (or ours) for each inquiry, thus saving time and resources. We do not expect small brokerages to have dedicated marketing/design staff. While any marketing team's input for branding and design continuity is valued, they may not be the primary users

of the platform, especially considering the remote work dynamics and the potential for faster client turnaround times. The real value lies in enabling brokers to have a direct impact on the visual aspects of their proposals and itineraries without extensive reliance on marketing personnel.

3. Tech-savvy users:

According to feedback from the sales and success teams, users who possess greater technological proficiency tend to have a better grasp of the platform's functionalities and utilize it more effectively. The current product is particularly well-suited for small team operations, where individuals often juggle multiple responsibilities. However, most of the market lacks such technological inclination and, in some cases, overestimates their own tech savviness. This finding highlights the need to address the platform's usability and user-friendliness to cater to a broader audience with varying levels of technical expertise.

4. Open to change:

According to the sales and success team, customers who are more flexible and open to new methods are more likely to embrace our platform. In contrast, larger organizations with established processes and existing solutions may be less inclined to try our product as a new workflow method. Most users mentioned by the sales and success team rely on tools like Canva, PowerPoint, and Word to create their content. These users, who do not have industry-specific solutions for document development, are more receptive to adopting our platform and are open to change. One salesperson estimated that 80% have not tried something as sophisticated as Canva, but this would need more investigation to be relied upon.

5. Little-to-no design experience:

Based on feedback from the sales and success teams, it has been observed that a significant portion of potential clients who show interest in our platform lack design experience. These users may not have a background or expertise in graphic design, visual aesthetics, or creative content creation. This can pose a challenge for them when it comes to developing visually appealing materials for their business.

6. Want to 'Create something':

Although these users are not design experts, they still aim to create visually appealing and well-researched documents. They understand the importance of content and are eager to add creative elements to their proposals. They value the flexibility to customize and go beyond standard templates, utilizing various texts, images, and layouts. Some customers often hire marketing professionals to compensate for their lack of design expertise. This reliance on design experts may contribute to brokers not fully appreciating the effort involved in creating content. Users who value creativity and customization appreciate the product. However, as a few salespeople pointed out, they like the idea of customisability, but have limited time and effort to put in to achieve it.

7. Captains as potential advocates:

A large cohort of those interviewed mention that captains, particularly those in small businesses or family-owned yachts, are keen to use the tool for creating itineraries or integrating it into their websites. The platform appeals to users who consider themselves "hustlers" and are motivated to make it work with limited resources and without extensive technology stacks or teams. They see the platform to level the

playing field and achieve professional-looking proposals without investing excessive time and money.

In summary, users appreciate the concept of the platform but feel it falls short of expectations. Smaller brokers (1-5 brokers) are most likely to find value in it. Technologically inclined users understand and use it better, though there may not be many who meet this criteria. Open-minded customers are more receptive. Most users lack design experience but still want visually appealing documents. Captains see it as a tool for creating itineraries.

Further comments:

The customer demographic for the platform has changed over time. Initially focused on mega yachts and larger firms, it has now expanded to include small independent brokers and even captains. The evolving customer base presents a challenge in finding the right middle ground to accommodate their varying needs.

Summary of service issues:

1. Limited User Engagement:

Sales and success staff have observed that users do not log in frequently or extensively use the platform. They perceive usage as occasional rather than integral to daily operations. This suggests that brokers, particularly during the high season, may be hesitant to invest significant time and could abandon the platform quickly if they encounter difficulties or fail to achieve immediate results.

2. Insufficient Prompts and Messaging:

The absence of warning or error messages, tooltips, and contextual help throughout the platform leads to user errors and deviations from intended usage. Sales and success teams highlight the need for improved guidance and prompts to ensure users understand how to input data correctly and utilize the platform effectively. A user suggested implementing messages or progress bars that remind them of the tasks they need to complete or the sections they may have missed. Several respondents noted that clear indicators of what has been done and what still needs to be accomplished would improve the user experience.

3. Unclear Data Saving Process:

All sales and success personnel express uncertainty regarding the saving of data, particularly when distinguishing between saving data to an itinerary versus a proposal. This lack of understanding indicates a need for clearer explanations and user-friendly features related to data storage and organization. The potentially unclear rules around what is saved to a proposal or itinerary based on what environment you are editing in were discussed.

4. Complex and Non-Intuitive Steps:

Users frequently encounter challenges in completing tasks and report difficulty in remembering the necessary steps, even after successful onboarding. Simplifying the process with a guided wizard or walkthrough approach was discussed, especially for the itinerary editor and proposal editor, to enhance usability and prevent user frustration.

5. **Limited Support for Independent Learning:**

Users express a preference for self-paced learning materials instead of lengthy training sessions. The absence of a comprehensive knowledge base or product walkthroughs hinders independent learning, forcing users to rely heavily on the success team when they encounter obstacles. Providing robust resources for independent learning is crucial for user empowerment.

6. **Lack of User-Friendly Terminology:**

The platform has encountered challenges with vocabulary that appear confusing to users, particularly concerning the distinction between a "proposal" and an "itinerary." Different users have exhibited slightly varying interpretations of these terms, leading to potential misunderstandings. While some users perceive a proposal as a comprehensive collection of itineraries and yachts, the platform currently defines it solely as an itinerary. This disparity in understanding could result in users struggling to grasp the platform's intended structure and functionality. Additionally, the nomenclature used for the proposal builder in the dashboard has been inconsistent, making it difficult for users to discern the appropriate term for this tool. Clarifying and aligning the terminology, as well as addressing the proposal builder's naming conventions, would be crucial steps to enhance user comprehension and streamline their interactions with the platform. Some interviewees suggest renaming the proposal editor and implementing user-specific terminology to alleviate this issue and enhance clarity.

7. **Need for Quick Proposal Generation:**

The current platform primarily focuses on empowering users for full customization of proposals. However, most interviewees express a preference for a quick and easy template-based approach initially, followed by the option for further refinement and customization. Providing a streamlined method for generating proposals quickly is seen as valuable for user satisfaction and efficiency.

8. **Too much flexibility and choice:**

Users consistently express feelings of being overwhelmed by the abundance of choices available throughout the platform. This sentiment applies to various aspects of the user experience, spanning from design options to content customization and feature selections. The wide array of choices presented can be perceived as overwhelming and confusing, hindering users from effectively navigating and utilizing the platform to its full potential.

9. **Sales and success unaware of platform capabilities:**

During the interviews, several respondents acknowledged that they were unaware of certain features of the platform. This indicates a breakdown in the training and handover process between the product team and the sales and success team. Given that sales and success are the frontline representatives of the product, it can be inferred that many users who are currently using the platform may also be unaware of these features or many more features.

Interview results

Positive feedback:

1. **Positive feedback during the sales stage highlighting benefits:** During the sales stage, users have provided positive feedback highlighting various benefits of the platform. These benefits include ease of use, customization of content, and the ability to create a personalized look and feel. Users often have a "love at first sight" experience during demos, appreciating the platform's user-friendly interface and the flexibility it offers.
2. **Library of images and descriptions:** Users highly value the platform's library of images and descriptions. The availability of pre-selected images and detailed descriptions enhances the content creation process for users.
3. **Appreciation for design details:** Users have expressed appreciation for small embellishments and design details incorporated into the platform. Elements such as lines and dots are particularly mentioned as being well-received by users. The ability to add these design elements enhances the aesthetic appeal of the platform and adds to the overall user experience.
4. **Users who love the platform:** There is a segment of users who truly love the platform for its flexibility and customization options. These users value the ability to create and customize elements according to their specific needs. They find the platform easy to navigate and highly beneficial for their purposes, leading to a strong affinity towards the product.
5. **Positive feedback on the live map feature:** Users have expressed positive feedback regarding the platform's live map feature. They appreciate its functionality, allowing them to scroll through the entire world and navigate with ease. The overall design layout of the live map feature is also highlighted as a positive aspect that contributes to the positive user experience.

Specific feature issues and common requests

Onboarding

Incorporate branding setup and logos:

Several users have identified an opportunity to incorporate the setup of branding, logo, and company details during the sign-up process for Trips. This would allow users to establish their brand identity and customize their company information right from the beginning. By integrating these branding elements early on, users can streamline the onboarding process and ensure a cohesive and personalized experience from the start.

User settings(non-existed)

These following points outline common requests among those interviewed.

Subscription management:

Admins should have the ability to oversee subscriptions, manage billing information, and track payment details. This function would ensure smooth and efficient management of subscriptions and financial transactions, with reporting around credit usage.

Reporting and analytics:

Admins should have access to comprehensive reporting and analytics tools that provide

insights into system usage, performance, and other relevant metrics. This function would enable admins to make data-driven decisions and identify areas for improvement.

System configuration and customization:

Admins should have the ability to configure and customize various aspects of the system, such as layout, branding, settings, and integrations, personal details and more. This function allows admins to tailor the system to their specific requirements and enhance the user experience.

Dashboard

Initial impression:

A variety of users have expressed that their initial impression of the platform is overwhelming. They believe it is due to the multitude of tiles and information presented on the dashboard when they first log into the platform. Clear sections, a clear indication of what to do next, or onboarding steps they need to achieve, would make it more user-friendly and help brokers feel more at home.

Lack of pagination:

A user mentioned issues with the dashboard and the lack of infinite scrolling or proper pagination. Adjustments to this experience would elevate the overall experience of the platform.

Trending itineraries:

One respondent expressed an idea to show “trending” or “hot” itineraries that are being used the most in the platform by users. This will likely be more dynamic once we have a larger pool of users regularly using our platform.

Inconsistent Display of Recent Items:

Most users expressed frustration that recent items they were editing were not displayed in the top left-hand corner of the dashboard as expected. They anticipated that the most recent itinerary or proposal would appear in that location.

Customizable Sorting and Filtering Options:

Users expressed a desire to have the ability to choose how they sort and filter their dashboard. They would like more control over organizing and accessing their data based on their specific preferences and needs.

Additional Dashboard Features:

Several users requested the inclusion of dashboard widgets, analytics, and notifications to enhance their user experience. They desired features such as credit usage notifications, alerts when a customer opens a sent proposal, insights on high performing proposals, and more. These additions would provide users with valuable information and enhance their engagement with the platform.

Users Perceived the Cart as Disabled:

Users found that the cart in the proposal builder had a visually misleading appearance, which made it seem disabled or inactive. The lack of clear visual cues or indicators caused users to question its functionality and led to the misconception that it was not a functional element of the platform. This issue was particularly evident during customer onboarding, as users frequently overlooked the cart's presence on the right side of the screen. The invisibility of

the cart created difficulties for users in understanding its purpose and utilizing its features effectively.

Confusing Terminology for the 'Proposal Builder':

Users expressed confusion regarding the terminology used for the 'Proposal Builder,' which later was referred to as the "Cart." The chosen terminology was not immediately intuitive or clear to users, requiring additional prompts or explanations to help them understand its purpose within the platform. Users felt the need for clearer and more straightforward terminology that accurately reflects the functionality of the tool.

Dragging Cards in the Cart:

Users expressed dissatisfaction with the process of dragging cards into the cart, considering it to be time-consuming. They preferred a more efficient method, specifically using the plus symbol directly on the card itself to add it to the cart. This alternative approach provided a faster and more convenient way for users to select and include items.

Reordering Items in the Cart:

Users generally did not have an issue with rearranging items within the cart through dragging. However, they initially struggled to understand the purpose and benefits of this functionality. The significance of reordering items within the cart was not immediately apparent to users when they first encountered it, requiring further clarification and guidance for a better understanding.

Usage of Proposal Name Field:

Users rarely utilized the proposal name field located at the top of the cart. Furthermore, they found the inconsistency in the appearance of internal and external names to be confusing. Users recommended the adoption of a unified approach, suggesting the use of a single name field for both proposals and itineraries. This simplification would enhance the naming process and eliminate confusion regarding the display of names within the dashboard and throughout itineraries and proposals.

Proposal and itinerary cards:

Users provided valuable feedback regarding various aspects of the cards in the platform. One common concern was that the cards appeared too similar, too small, negatively impacting readability and scan-ability. Users expected a click on the card to open the corresponding item in the editor, but this action instead opened the dashboard preview. To enhance usability, users suggested that the cards clearly display the number of days and locations in the itinerary. They also raised questions about the necessity of certain items on the card and recommended refining the content to be more relevant. Another point of feedback was the custom purple corner, which users found too subtle. They suggested that the purple corner should specifically indicate Ankor itineraries, not their custom ones. Users emphasized the need for a larger preview of the content within the cards, enabling them to better evaluate and understand the itinerary details. They also expressed interest in having a timestamp displayed on the card, indicating the last edit made, allowing for easier tracking of changes. Interestingly, all users preferred using the plus button to add the card to the cart, indicating their preferred method of selection. Additionally, some users expressed the desire to send the itinerary directly from the card, streamlining the sharing process. One user specifically requested the option to choose an "Asana-style" card design for their proposals or itineraries, suggesting a stacked horizontal strip format as an alternative to the current card design.

Expanded preview cards:

Feedback was gathered from users regarding the expanded card view in the platform.

Clicking on a card in the dashboard and expanding it provides some information, but brokers are unsure of what to do next. Some users expressed that they found the preview unnecessary and seldom used it during their workflow. On the other hand, some users suggested that the expanded card should include the map for better visualization of the itinerary and found it helpful. Another user preference was to display the name of the itinerary instead of just the first and last locations. Users also desired a more intuitive way to add items to the card, as the current process was not as straightforward. One area of confusion was when the expanded card was open, users found it unclear which card was being viewed. To enhance the experience, one user proposed an alternative design featuring a hover and modal pop-out. Additionally, users expressed interest in the ability to send the itinerary directly from the expanded view for greater convenience. One user mentions that the preview offers a working overview of the contents of the card but raises concerns about limited screen space.

Requests for yacht features:

Users wish the platform had yacht specific features, as it is seen as a deal-breaker for a significant cohort of potential customers. Features requested include 'Create your own yacht' module, a yacht database, and yacht specific sections for a proposal. When asked about the percentage cohort of possible clients that will only join the platform with a yacht's module, the average amounted to 20-30% of the total customers although there were several outliers. These customers are focused on yacht-related services and require yachts as a central aspect of their daily business operations. However, some interviewees have raised concerns about the potential negative impact of introducing an uncuration yacht database. They believe that it could harm the Ankor brand and lead to additional customer issues on top of the existing ones.

Itinerary editor

Difference between itinerary editor and proposal editor:

Users, particularly smaller brokers, struggle the most with understanding and differentiating between the itinerary and proposal editor in the platform.

Lack of understand on how image libraries work:

Users express a lack of understanding regarding how images work within the platform, particularly in the context of the proposal editor and the overview section of the itinerary editor. They require further testing and investigation to identify the specific issues or expected results related to image functionality.

Error Correction:

Users may accidentally make mistakes or unintended changes while editing their proposals or itineraries. Having an Undo button allows them to quickly revert those changes and restore the previous state. It provides a sense of reassurance and helps users correct errors without the need for manual rework.

Control on expansion and contraction of map and content pane:

A respondent expressed the need for greater control over the screen size and layout, particularly when using a large screen. This suggests that the current interface may not effectively utilize the available screen space, potentially leading to suboptimal user experience. The respondent suggested that providing users with options to customize the display and adapt it to their preferences would enhance their overall usability and satisfaction.

Should the itinerary editor be merged with the proposal editor?

The decision of whether to merge the itinerary editor and proposal editor is complex, and

there is no clear consensus. While it is technically feasible to combine them, further deliberation is required. Some participants prefer separating the process into two exercises. They prefer creating the route and location details first and then working on the design and look like a separate step. While it may make sense to combine them currently, as the proposal evolves to include multiple object types and additional functionalities, keeping them separate may become more logical. Users suggested a smoother transition between the itinerary editor and the proposal editor, allowing for direct access without having to go back to the homepage. The user proposed a more seamless workflow where they can transition directly from editing the itinerary to working on the proposal.

The overview section:

Users find the absence of an auto-populated overview photo during itinerary creation and the image loading issue in the proposal stage to be confusing. They also face challenges in understanding the logical order of tasks within the platform. Despite receiving instructions and demonstrations, some users struggle to follow the correct sequence of actions and may mistakenly input location descriptions in the wrong section. This highlights the need for clearer labelling and user interface improvements to differentiate between the location description and the actual overview section, ensuring a smoother and more intuitive user experience.

Naming convention of locations:

One user explained that sometimes captains use different names for locations, which can create confusion for customers trying to find those places in the system. The inconsistency in naming, including spelling variations and different conventions, makes it challenging for customers to locate the desired locations. One suggestion was to have a “also known as” field for a location.

Hidden fields for day overview:

Users have noticed that certain fields in the itinerary editor, such as the day overview and overview descriptions, appear hidden or overlooked. As a result, users may forget to include this important information in their itineraries, leading to blank spaces in their proposals. The current design, particularly evident in day cards, is primarily optimized to accommodate content for all data fields. However, user behaviour has shown that some users either forget to input certain information or choose not to include it, resulting in suboptimal results. To address this issue and enhance user experience, introducing a new design or reevaluating the existing design becomes crucial. The new approach should be tailored to optimize for both scenarios: situations where users provide complete content and cases where users leave certain fields blank. By creating a more flexible and adaptive design, the platform can better accommodate various user preferences and ensure that the proposal editor remains user-friendly and efficient, regardless of the level of information inputted by the user.

Users prefer to use Ankor location information:

Users choose Ankor locations primarily for three reasons: time efficiency, access to high-quality imagery, and the difficulty of finding comparable alternatives. Ankor's comprehensive database of locations saves users valuable time by providing a wide range of options in one place. Additionally, the platform's curated collection of high-quality images enhances the visual appeal of their proposals and itineraries. Lastly, users find it challenging to source equivalent locations with the same level of accuracy and reliability outside of Ankor's platform.

Issues with day buckets:

Users must manually update day titles day buckets within the itinerary editor if they move the

order around. An automated renaming function was suggested by most users and a day picker which could link with a weather widget for itineraries. User must also manually add day buckets to their itineraries. Assisting users with a day picker would alleviate this manual process.

Separate place for creating location:

Most users expressed a preference for a combined workflow where they can create both locations and routes together. They believe that while developing an itinerary to send to a customer, it is difficult to determine in advance which locations they want to create. By combining the creation of locations and routes, users can update and verify information as needed before sending the itinerary. This eliminates the need to recreate or edit existing location information separately. Additionally, users find a combined workflow more intuitive as it aligns with the purpose and context of their itinerary creation process.

Preview of itinerary:

Over half of those interviewed said they prefer to see a preview of their proposal as they are building it, as it helps them visualize the result and make necessary adjustments. On the other hand, just under half the respondents expressed a preference for creating the design and adding route or itinerary details as a separate exercise.

Issues with itinerary Map:

1. Users find the automatic expansion and contraction of the itinerary editor map and content panel to be disorienting and frustrating. They desire more control over the level of expansion or contraction of the content.
2. Users frequently lose track of locations within their routes and struggle to locate them on the map. This causes confusion and makes it difficult to maintain a clear overview of the itinerary.
3. Users encounter issues when trying to delete a custom pin on the map. The deletion process is not instantaneous as expected, leading to frustration and inefficiency.
4. Users describe the map as being slow and unresponsive, resulting in a laggy experience. They express a preference for faster map responses to ensure a smooth and efficient workflow. Users emphasize that a speedy experience is particularly important for quick and urgent proposals, while acknowledging the need for a more refined curation process for proposals of significant value.
5. A user has requested that the location cluster bubbles to be made to match the colours and branding of Ankor. They feel that the current design doesn't fit with the overall look of the platform. By aligning the cluster bubbles with the Ankor colour scheme, the visual experience will be more cohesive and professional.
6. In the itinerary editor, users have asked for a preview of the distance for the route lines, allowing them to have a clear understanding of the distances involved. Additionally, users could have the ability to edit the route lines according to their preferences.
7. One respondent recommended an enhancement to the user experience of the map by improving the location transitions to be smooth and seamless. This can be achieved by incorporating a map into the itinerary preview on the dashboard, where location names are displayed on the respective dots, making it easier for users to identify and visualize the itinerary.
8. Several users expressed the need to drag and move custom location pins, ensuring flexibility in arranging the itinerary. The customization options for the map route should be comprehensive, allowing users to adjust and visualize map links or paths between location pins. Simplifying the process of editing custom locations' latitude and longitude coordinates would also be beneficial was recommended.

9. All interviewees who completed the challenge expressed frustration towards the lack of auto labelling day buckets inside the itinerary editor. Recommendations to auto labelling the day buckets with mention to day pickers were made.
10. Several sales and success people mentioned the need for reconsideration to ensure efficient management of itineraries. They mentioned confusions with customers expecting updates made to the itinerary would be automatically reflected in the proposals or vice versa.

Location Lozenges:

Users have expressed their expectation for improved navigation within the itinerary editor. Specifically, when clicking on a location lozenge or a location pin on the map, users anticipate that the corresponding location information would zoom in on the map or open its location content in the content pane automatically. This feature would enhance the user experience by providing seamless access to relevant details.

Furthermore, users often encounter difficulties in maintaining their position while editing lengthy itineraries. Users have provided feedback regarding the clarity of the location lozenges in the platform. They report that the lozenges are not immediately perceived as clickable elements, causing confusion and potential navigation challenges. Users suggest improving the visual cues or indicators to make it more evident that the location lozenges can be clicked on for further interaction. Enhancing the visibility and intuitiveness of the clickable functionality would improve the user experience and facilitate easier navigation within the platform.

Map location pop ups:

Users have expressed their desire to have a more comprehensive preview of the location when interacting with the location pin pop-up. They would like to see additional information such as location images, and in the future, details about activities, points of interest, or restaurants associated with the location. This expanded preview would provide users with a more immersive and informative experience, allowing them to gather a better understanding of the location and its offerings before adding it to their itinerary route.

Proposals

Request for a embed proposal feature on website:

A few sales and success staff members have noted that customers have requested the ability to embed proposals on their websites. However, implementing this feature may pose challenges due to the current credit system, which is designed for one customer per proposal. To accommodate embedding proposals, a new type of crediting system or exclusive access for users on premium subscriptions may be necessary.

Embed feature:

The idea of adding a new section type to the proposal editor, particularly an embedded media/video section, is well-received. It is suggested to make it easier for users to change the dimensions of the embedded media by providing input fields with visual representation.

Business card:

Users have expressed confusion regarding the inconsistency in the editing experience within the platform. They find it strange that some fields allow them to edit text directly within the

field, while others require accessing a side editor to make changes. This inconsistency in the editing process can be confusing and disrupts the user workflow. Users prefer a more streamlined approach where they can make edits directly within the field without the need for additional side navigators. Simplifying the editing process and minimizing the reliance on side editors is highly desired for the proposal editor.

Space section:

A respondent has noted that certain sections use settings-based customisation, while others use style-based customisation. This approach is not consistent across sections, for example on the spacer section in the proposal editor using a style, when the variability is a size and nothing else.

Request for new section type “Client conversion” section:

During the feedback session regarding potential additions to the proposal builder, two respondents suggested the implementation of a dedicated "call to action" section, aimed at increasing user engagement and conversion rates among RA customers. This proposed section would enable users to book itineraries, as well as like or rate existing itineraries. By incorporating such a feature, the platform aims to drive more interactions and conversions among its customers.

Request for new section type “Make your own section”:

During the feedback session about potential additions to the proposal builder, two respondents suggested the incorporation of a "Create your own section" feature. They expressed the desire for a highly flexible section where users could add custom buttons, text, and graphics as they see fit. Both users believed that such a feature would significantly enhance the overall customer experience of using the app.

Requests for a weather widget:

Users have expressed a desire for a weather widget that would enable them to input a specific date and location through the itinerary editor and for it to display weather information. This widget would provide valuable insights into alternative itinerary options in case of unfavourable weather conditions for RA customers. Typically, users do not send multiple itineraries unless there is a possibility of bad weather that may require itinerary adjustments by the captain. The inclusion of this feature would likely be received as a delightful addition to the platform.

Content sourcing:

A large cohort of those interviewed said they used Chat GPT or other AI content writing tools to assist them to generate content where they did not have any. These tools could likely be integrated into our platform to assist users create documents faster.

Image pool:

Users have expressed their desire for an image library that offers generic images for categories like "beach," "bar," and "restaurants" when they lack specific location images. While specific location images may not be applicable in all cases, users believe that having a collection of generic images would be valuable. This feature would allow them to visually represent various categories or themes in their proposals or itineraries, enhancing the overall presentation. When referring to a specific location, users prefer using images directly from that location. One user suggests incorporating metadata or references in the image pool to facilitate the selection of appropriate images. Additionally, users face challenges in finding suitable photos for remote or water-based locations, particularly for activities like floating, swimming, or diving. Addressing these gaps in imagery would contribute to creating more engaging visuals for those areas.

Preview of proposal:

Based on user interviews, it was found that a significant number of users considered the preview watermark on the preview page to be unnecessary, and in fact, it detracted from the overall preview screen experience. Users expressed that a simple banner would have served the purpose more effectively.

Feature request Image adjustments and filters:

The majority of those interviewed acknowledges the impact that well-chosen photos can have on the overall quality of an itinerary. Customers appreciate visually appealing images that evoke a desired experience and contribute to the overall presentation and attractiveness of the itinerary. Images play an important part of closing deals for customers and are the items that are fixated on the most.

Requests for a paginated pdf function:

According to the feedback provided by the sales and success teams, there is a consistent demand for a PDF function during onboarding calls or sales demos. This specific request stems from clients who anticipate being offline or in areas with limited internet connectivity during their itinerary. These high-profile clients have expressed a strong preference for PDF documents, as they have concerns about clicking on links that could compromise their privacy or potentially lead to fraudulent activities. The desire for a PDF function highlights the need to provide a reliable and secure offline option for accessing and sharing information, catering to the specific requirements and concerns of these esteemed clients. Roughly 50% to 75% of the one to five broker market has expressed a requirement for PDF functionality, indicating its importance as a core requirement for a significant portion of the target audience. There is limited evidence for a strong desire for printing and pagination.

Navigation between the various itineraries while inside the proposal editor:

Users have expressed that navigating between different itineraries within the proposal editor is not intuitive in its current implementation. The linear display of all itineraries does not necessarily align with how customers perceive them. To improve this, users have suggested several enhancements. They recommend incorporating a navigation bar or submenu specifically designed for navigating between itineraries or other content like sections. Clear page breakage or scroll separation can also help differentiate between each itinerary. Additionally, users find it confusing that the long-paginated view of all itineraries is lost after clicking on a specific itinerary in the top navigation bar. This lack of consistency creates confusion and hinders smooth navigation. A user made a comment that part of the reason.

Adding, removing, and editing itinerary information:

The consensus among those interviewed is a dissatisfaction with the existing workflow for editing, removing, and adding itinerary or yacht information to their proposals. The current process is seen as cumbersome and complex, lacking the desired efficiency and user-friendly experience. There is a strong demand for a cleaner and simpler approach to updating content within the proposals. Streamlining the workflow and providing a more intuitive and seamless editing experience is considered essential by all respondents. Adding a new section can be a bit challenging because the blue action icon that allows adding a section only appears when hovering over the space between sections. This may not be immediately intuitive for users, but once they become familiar with it, the process becomes easier.

Auto calculating distances for day cards and map:

Several users have requested the feature of an automatic calculation of distances and travel

times between locations, based on yacht speed for proposals. This feature would save time and improve convenience.

Requests for a 'Link history' feature:

Most sales and success team members have expressed a strong desire for a "History" feature that would display the previous links generated for a proposal along with a timestamp. This feature would provide valuable visibility and tracking of the proposal's history, allowing users to easily reference and review past versions of the proposal. The inclusion of timestamps would further enhance the usability of this feature, enabling users to track the timeline of changes made to the proposal and facilitating better collaboration and communication within the team.

Requests for a zoom function for the viewpoint:

An interviewee suggests that if the proposal viewport was smaller, it would allow for the start of the next section to be visible, drawing the eye down and potentially improving the user experience. They express the desire to be able to see the whole screen without obstructions, as it would make more sense and improve the user experience.

A simple naming field for proposals:

Users have expressed the need for a simple and straightforward naming field for a proposal. This feature allows users to assign clear and concise names to their proposals, facilitating easy identification and management. By providing a dedicated naming field within the proposal management system, users can quickly label their proposals with descriptive titles, streamlining workflow and improving efficiency.

Request for font editing feature:

Users have expressed their desire to have a font editing feature can be added to the text editing panel within the proposal editor. This enhancement grants users more control over the appearance of their proposals. The font size editing feature enables users to adjust the text size, ensuring readability and visual appeal. Additionally, the font style editing feature empowers users to choose from various styles such as bold, italic, or underline, allowing for emphasis and creativity in the presentation of proposal content. These font customization options enhance the overall visual impact and effectiveness of the proposals.

Request for a 'Quick compare' table of contents:

Several users mentioned the desire for a table feature to provide an overview of the yachts or itineraries included in a proposal. They suggested incorporating a quick compare function that highlights important features of each yacht or itinerary in a visually appealing table format. This feature would enhance the overall look and feel of the proposal while allowing users to easily compare and assess the key attributes of different options.

Improvements and more designs for existing sections over more section types:

Users have expressed a strong preference for a wider range of section designs and customization options within the existing set of sections, rather than simply adding more section types. They believe that having more layouts within each section would offer greater flexibility and enable them to create more unique and visually appealing proposals. Specifically, users emphasize the importance of having at least three distinct layouts for each section to consider ideal. They also mention the desire for specific design elements, such as galleries for showcasing crew information and other relevant content. In addition to design options, users highlight the need for improved copywriting and the inclusion of high-quality, visually appealing images to enhance the overall presentation of their proposals.

Editing colours, fonts, logo, and profile information:

The process of setting up company branding elements like the logo, colours, fonts, and profile image is relatively easy when users have the necessary information but upon reflection mention that the features are a little hidden for novice users. Providing clearer instructions for inputting and applying this information across different sections is advised. Most users prefer a user settings page outside of the proposal editor for easier access, but they also want the option to access these settings within the editor with some enhancements. Users find it confusing that these settings are scattered across different tabs instead of being grouped together under a unified "settings" umbrella. A more centralized and uniform editing process is desired to streamline the experience. One user mentions that some of this content could be pulled from HubSpot.

Which colours affect which sections:

Many customers have enquired about what colours affect which sections in the proposal editor. One suggested improvement is to enhance clarity regarding which elements in the proposal editor are affected by specific colours. The multiple options for selecting colours could be enhanced with a preview feature that allows brokers to see how colour changes impact a sample itinerary layout. Additionally, users expressed interest in having the ability to choose which colours are applied to each item, providing a higher level of customization. Templates could still have default settings, but users should be able to override these settings to achieve their desired colour schemes.

Editing sections within proposals:

The overall sentiment expressed by those interviewed was that the method of editing a section in the platform was relatively straightforward. However, users shared suggestions to enhance the editing process. One common suggestion was to have an actions panel that remained visible on the screen, following the user as they scrolled through different sections. This would always provide easy access to editing options. Additionally, a few interviewees specifically expressed dissatisfaction with the fact that the editing pane for a new section did not automatically appear when it was added to a proposal. This lack of automatic visibility hindered their workflow and caused frustration.

Duplicating a section:

A few users voiced their dissatisfaction with the current behaviour when duplicating a section within a proposal. They found it frustrating that the content from the original section did not carry over to the duplicated section. This lack of content duplication created an additional step for users, requiring them to manually re-enter the content in each duplicated section and choose the specific style or settings manually. Users suggested that the duplication process should include the ability to replicate the content, style, and settings as well, streamlining the editing process and saving time.

Adding and removing a new section:

Users found the process of adding and removing a new section in a proposal to be intuitive and straightforward. They appreciated the ease with which they could add new sections to their proposals. Some users suggested enhancements to further improve the process. They recommended the implementation of a side panel that displays all sections, providing convenient insertion points for adding new sections and options for deleting sections. This approach would provide users with a clear overview of their proposal structure and simplify the management of sections within the platform.

Moving sections up or down:

An annoyance mentioned is that when trying to move sections up or down, sometimes it doesn't always move as intended or take the interviewee with it.

An interviewee mentions that when pressing the "up" button, they sometimes expect to press it again to go back to the same spot but instead a different pop-up appears. This behaviour can be confusing and could benefit from improvement.

Share proposal via WhatsApp and email:

Users have expressed their desire for a convenient way to share proposals with others via popular communication channels such as WhatsApp and email.

Request for 'Collage' section:

Three separate users have expressed a desire for more flexibility and customization options in the proposal editor, particularly when it comes to creating sections with photos and text. They mention wanting a blank section that can add any button or section type to it.

Saving proposal preferences:

Saving proposal preferences in Trips is generally considered easy and straightforward, but there are some areas that can be improved. One suggestion is to have the edit menu and section menus more pronounced and visible to make it clearer for users. The concept of a 'Team templating system' was discussed. Saving settings in the proposal editor may not be intuitive for users, as they often forget the process.

Changing content in a proposal:

When it comes to changing details of an itinerary that is part of a proposal, there is some confusion about whether the changes are saved in the itinerary for future use. It is suggested to provide a clear option for users to decide whether they want to apply changes to the original itinerary or taking the option away to edit content inside the proposal editor were discussed. Many users highlight the frustration of losing progress or having to start over when adding a proposal or itinerary.

Library of templates as a starting point:

Most sales and success interviewees have expressed the need to create quick and simple proposals that are aesthetically pleasing. To provide users with a comprehensive and efficient proposal creation experience, the inclusion of a library of templates could serve as a valuable starting point.

Minimisation of repetitive tasks:

The consensus is that building a proposal is a time-consuming process. Users suggest automating certain tasks to streamline the workflow and save time. For example, adding disclaimers or footing information across all itineraries could be simplified by implementing a "footings" sticky section that appears along all itineraries. Additionally, users express the need to minimize manual entry of route distances and other repetitive tasks. They prefer to focus on customizing the proposal rather than spending time on mundane tasks.

Quick sharable proposal building experience:

Most sales expressed a need to have a past track 'build and share' method for RA's generating content for their customers. A discussion around a method for a quick sharable proposal building experience is a crucial aspect of any efficient proposal management platform. By prioritizing this feature, users can experience a streamlined and hassle-free process when creating and sharing proposals.

Configured and automated content creation for missing fields:

The observation of users resorting to utilizing ChatGPT for generating content in areas where our platform lacked information raises the question of whether integrating an AI content writer would be beneficial. It is worth discussing whether incorporating such a feature into our platform is a prudent decision, as it could potentially minimize the need for users to seek content generation outside of our platform.

Requests for eat, play, do features:

A library of restaurants, activities, and points of interest for a proposal is a common request, suggesting that adding a separate section for activities could be popular. The general sentiment is that users prefer a smaller batch of curated content is more favourable than a larger batch of poorer content. Quality and reliability are considered more important factors for users, even if the quantity of information is limited. A smaller percentage of those interviewed, expressed they wanted access to search results like what google offers in addition to the curated content.

Desktop, tablet, and mobile editing:

Users of the platform expressed a strong desire to have the capability to preview and customize the content displayed for different device types. They emphasized the importance of ensuring that the content remains consistent and visually appealing across various devices, such as desktops, tablets, and mobile phones. The ability to preview and adjust content for different screen sizes and resolutions is crucial to provide an optimal user experience and accommodate the diverse range of devices used by their audience. By having this feature, users aim to create presentations and proposals that are tailored and well-suited to each device type, ultimately enhancing their communication and engagement with their clients or audience.

Spacing around sections:

Users expressed dissatisfaction with the spacing around sections. One user reportedly referred to the leading and spacing of the text as “tragic”. Another struggle mentioned is the difficulty of spacing out the copy to align with the image consistently. The participant expresses the need for a more efficient way to achieve this alignment, as it currently requires a significant amount of manual editing.

Charterer view top navigation section:

Users are seeking greater control over the images displayed in the charterer view top navigation bar for the various itineraries and yachts included in their proposals. Currently, the platform defaults to showing the hero image, but if a user hasn't selected a hero image, the navigation bar itinerary or yacht option remains empty. To improve this, users want a more customizable approach that allows them to designate specific images for the navigation bar, regardless of whether a hero image has been chosen. This customization would provide users with the flexibility to curate a visually appealing and cohesive presentation within the charterer view, ensuring a better representation of their proposals and yachts to clients or potential customers.

Map enhancements:

1. One of the changes requested is to automatically draw route lines between itinerary pins on the map, representing the distances and routes the charter will take while considering land and obstructions. These automated route lines should be able to adjust and navigate around obstacles, and users should have the option to edit them, including the ability to make the lines go over land if desired.
2. Respondents requested the addition of a double-click or double tap to zoom function for the map.

3. A respondent mentioned that the monochrome map section should have editable fields for customization.
4. Additionally, the distance of route lines between itineraries should be automatically calculated for map statistics.

Ankor Staff Administration System (Plank)

Administrator Roles and Permissions:

During the interviews, a small group of participants expressed a preference for a more granular approach to assignment and allocation of permissions and functionality. They proposed a system would empower Ankor administrators to define and assign precise roles and permissions to staff members, providing them with the ability to control the level of access and tasks everyone can perform within the system. They believe this feature would enhance security and ensure that staff members have appropriate privileges based on their responsibilities and requirements.

Managing users:

During the interviews, a few participants expressed a desire to have comprehensive user management capabilities through the Ankor staff administration system. They seek the ability to manage all aspects of user profiles, encompassing preferences, personal information, subscription details, and more. This includes the capability to modify user preferences based on their individual needs and update personal information as required. Users also emphasized the importance of efficiently managing subscription-related data, such as monitoring subscription status, updating subscription plans, and managing billing information.

Managing teams:

A few participants expressed a strong desire for the inclusion of organizations or teams within the Ankor platform. They highlighted the importance of team-specific content, such as proposals, itineraries, and more, to enhance collaboration and efficiency within the organization. Each team would have a distinct identity, resembling a company, complete with a unique name and an emblem, typically represented by a logo. This would allow teams to have a unified and professional appearance when interacting with clients and stakeholders.

Building curated restaurants, bars, points of interest and more:

Most participants expressed a strong need for Ankor staff to create and generate curated content for restaurants, bars, points of interest, historical locations, monuments, and more. Interviewees emphasized that providing the most valuable and up-to-date information is essential for the platform's success. They expressed the importance of having a reliable method to update and maintain this data to ensure that users can access relevant and accurate information while planning their itineraries and proposals. Ankor staff were eager for a user-friendly and efficient way to add, modify, and curate content for various locations, ensuring that users have access to the latest and most noteworthy places to visit.

Managing proposals

The interviews revealed that the current process for Ankor staff to create a proposal on behalf of a user is laborious. An improved and more streamlined approach was suggested, where Ankor staff members could directly make a proposal and push it to the user's account, eliminating the need for additional steps and password resets. Additionally, there were concerns raised about a security breach that allows Ankor staff members to share a proposal URL and access it from within another user's profile. This "bootstrap" approach to sharing proposals was acknowledged as risky and potentially compromising user data security.

Managing templates

Based on discussions and feedback from interviews, there is a clear need for a designated space within the Ankor platform where Ankor staff can create and push templates to users. Users expressed a desire for a more efficient and standardized approach to proposal creation. By having a centralized location for templates, Ankor staff can ensure consistency and provide users with ready-made formats that align with their specific needs. This feature could streamline the proposal-building process, saving time and effort for both staff and users. Additionally, the ability for Ankor staff to push templates directly to users enhances the platform's usability and flexibility, allowing users to access and utilize the templates effortlessly.