

Workspaces and home pages: An enterprise-level information architecture project

Sarah Fierman

Role: Senior Content Designer

Team: Discovery & Navigation

Company: HubSpot

● Outline

1. Context
2. The problem
3. My approach
4. Proposal
5. Next steps
6. Results
7. Impact

Context

● Context: The big picture

As a content designer at HubSpot, I worked across several teams who were building automation and data tools that had connections to many parts of the product.

This gave me a unique vantage point where I could see how the structure of our data layer and our product navigation was impacting the customer experience.

I realized that we were putting a heavy burden on our customers to navigate through **menus of tools and data** and **understand how to connect them** in order to **discover value and grow better** with HubSpot.

- Context: The company



What's HubSpot?

HubSpot is a leading CRM platform that provides software and support to help businesses grow better. The platform includes marketing, sales, service, and website management products.

● Context: My role and partners

My role ★

Senior Content Designer in Operations Hub

I led discovery work, surfaced common problems, and crafted an initial proposal for how we could fix them.

Partner: Product Design Lead, Discovery & Navigation team 🤝

As I completed discovery, I collaborated with a product designer partner who was focused on product IA and navigation. Together, we crafted the initial proposal.

Partners: Multiple teams across the company 🤝

I managed multiple stakeholders from across the company, including product managers, product designers, product & design leadership.

For the testing portion of the work, I consulted with and supported a content designer on the Automation team.

The problem

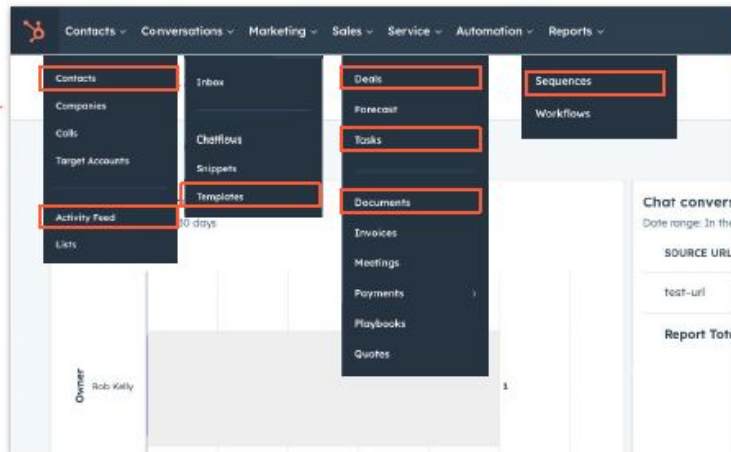
● The problem: Disconnected experiences

Disconnected experiences

Disparate tools throughout HubSpot make it difficult for customers to get their work done efficiently.

For example...

7 tools across
4 menus are used
to nurture a lead



● The problem: Lack of consistent education

Lack of consistent education

Without a narrative or opinion about how tools are connected or how they should be used, down-market customers struggle with **how to get started** and up-market customers struggle with **how to scale**.

The image shows a screenshot of the HubSpot automation interface. On the left is a dark navigation menu with the following items: Automation, Workflows, Sequences, Chatflows, and Surveys. The main area is divided into two panels. The left panel, titled 'Recent Conversation', shows options to 'Start from scratch', 'Start with a pre-made sequence', 'Event follow-up', and 'Product or Service Request'. The right panel, titled 'Create workflow', shows options for 'Contact based', 'Company based', 'Deal based', 'Event based', and 'Quote based'. A red handwritten note at the bottom left says 'Customers don't know when to use workflows vs. sequences.' Two red arrows point from the 'Sequences' menu item to the 'Start with a pre-made sequence' option in the 'Recent Conversation' panel, and from the 'Workflows' menu item to the 'Create workflow' panel.

Customers don't know when to use workflows vs. sequences.

● The problem: Missed upgrade opportunities

Missed upgrade opportunities

We rely heavily on upgrade modals and individual upgrade point solutions to carry the weight of upgrade narratives.

The screenshot shows the HubSpot interface for a Microsoft Dynamics 365 integration. The main panel displays sync health metrics: 347 records are 'IN SYNC' and 49 are 'FAILING TO SYNC'. A modal window titled 'Go beyond data sync' is overlaid on the right, featuring the heading 'Format your data' and a description: 'Automatically fix name and date properties, format phone numbers, add time intervals to a date and much more with Operations Hub Professional.' Below this, there is a link 'Get data quality automation' and a progress indicator '1/2'. A red arrow points from a 'Go beyond data sync...' button at the bottom of the interface to the modal window.

● The problem: Many teams solving the same problem

Several teams across the company were trying to solve these problems in their specific product area.

The solutions they tried were introducing new and inconsistent patterns, to varying degrees of success.

These problems are being **solved in different ways** across HubSpot

... by 10 different teams!

- Data Quality
- Content Intelligence
- Prospecting
- Marketing Orchestration
- Commerce
- Help Desk
- Automation
- Reporting dashboard
- Partner experience
- Calling
- Discovery

My approach

● My approach: Breaking it down

1. Gather information from teams
2. Audit competitor experiences
3. Craft a proposal and get buy-in

● My approach: Gather information

In UX and product Slack channels I put out a call for information from teams trying to solve common problems.

I sent this form to the product manager and product designer on each team.

Questions about [name of space]

Hi, [name] 🙋

I'm gathering information about how we talk about different types of spaces around the app and the problems these spaces are meant to solve. This work supports the navigation team as we put in place new navigation and scale experiences across the app.

Some of the answers to these questions were previously documented in [this questionnaire](#), but there are some added questions we're hoping to answer at this point while also confirming that these answers are up-to-date.

Please return this completed questionnaire to me!

Contact: [Sarah Fierman](#)
Senior Content Designer

Question	Brief explanation
What's now in production, what's the vision, and what do you need this space to accomplish in the future? Are there any big near-term changes coming soon or plans to rethink this space?	
Have you finalized the name of this space, or is that in the works? If so, what is the customer-facing name?	
Who is the target audience for this space?	
What's the task, or the specific actions, that these customers can carry out in this space?	

What specific customer pain points or and problems does this space aim to address? Is there a business goal this space aims to address?

Can you give usage metrics? For example:

- Frequency of unique page visits
- Frequency of returning customers
- Task completion frequency

Or, any studies that have been done to define the problem space?

What type of information or data is being used or surfaced in this space? Does this space contain any reports or analytics?

Are there any notifications being sent out from this space? How does this space surface broader types of information?

In which pricing tiers is the space available? Are there more advanced choices available to higher tiers?

Are there permission considerations or technical requirements that define who can use this space?

Where does this space now live / or where will it live in the product? Please, include a screenshot (or two) of the space, if possible.

My approach: Analyze feedback from teams

Then, I consolidated all the feedback in a spreadsheet and looked for themes.

These teams across the product were validating what I had seen in my own areas through the customer feedback they surfaced.

Source document	Questions about data quality comment center Data quality team	Questions about Commerce O2 Payments Management team	Questions about the Prospecting tool SAPO - Rep Efficiency team	Questions about Marketing home Marketing Orchestration team	Questions about Automation front door Automation management team	Questions about HubSpot partners dashboard Partner experience team
Team name	Data quality	Payments Management	SAPO - Rep Efficiency	Marketing Orchestration	Automation management	Partner experience
Contact	PM: Cara Jarosiewicz, PD: Alex Smith	PM: Joe Parr, PD: Julia Gon	PM: Glen Comal, PD: Andre Lora, CD: Laura Johnson	PM: Shay Redmond, PD: Montaq Dawach	PM: Claire Ila, PD: Kiana Hightgate	BSA: Opaid Estabani, PD: Fares Scott
Status	Answers received	Answers received	Answers received	Answers received	Answers received	Answers received
Notes	Information shared in HubSpot Home Page Stakeholder Conversations in July/Aug up-to-date . Necessary work is pending for up to 9/27/2024 .	Information shared in HubSpot Home Page Stakeholder Conversations in July/Aug up-to-date . Necessary work is pending for up to 9/27/2024 .	Information shared in HubSpot Home Page Stakeholder Conversations in July/Aug up-to-date . Necessary work is pending for up to 9/27/2024 .	Information shared in HubSpot Home Page Stakeholder Conversations in July/Aug up-to-date . This work is planned to kick off in Q4 of 2024 .	Information shared in HubSpot Home Page Stakeholder Conversations in July/Aug up-to-date . This work is planned to kick off in Q4 of 2024 .	Information shared in HubSpot Home Page Stakeholder Conversations in July/Aug up-to-date . This work is planned to kick off in Q4 of 2024 .
Answers	<p>Data Quality Comment Center Inquiry - what is now in production and what do you need this space to accomplish in the future? Are there any big merchant changes coming soon or plans to retire this space?</p> <p>The vision is to continue to add more metrics and insight into data quality that reflects an area of HubSpot. This would be the place to monitor and take action on any data quality issues including AI-powered metrics and clearance suggestions. We will continue to add many out of the box trends and visuals, but ideally this will be configurable for teams to monitor what they care most about in the future. Additionally (validation needed), I could see this space being a great growth lever for all hubs that have a sales vision and can show data quality/health metrics that would be added with additional feature sets.</p> <p>Beyond data quality's current ownership, there has been interest in data workspaces or a more closely connected experience that brings together key data management teams. For example the data model overview, data settings and data quality. This is still in research and we are working towards answering some of the key open questions through the work here. Scaled Data Ownership: Plans and Strategy 2/2024.</p> <p>There are no big merchant changes that would change the experience/navigation that exists today.</p> <p>Overview of our focus areas in 2024: Data Quality, Views and Reports.</p>	<p>Nothing in production today and at the moment, the vision is dependent on current research we're planning to run in Q3 2024. See Commerce Research Plan, Concepting the Commerce Dashboard.</p> <p>One of the areas we're exploring in this research is whether a dedicated space for revenue areas to bring together the different pieces of commerce. The general hypothesis may be valuable to merchants. This space would allow merchants to have a side-view for managing their list: overview revenue, billed payments, upcoming subscription renewals, etc. Additionally, we believe that the space could be useful for showcasing any accounting workflows, create your first invoice).</p>	<p>We're now in private beta.</p> <p>Read about our work on our Weblog.</p>	<p>The Marketing Home feature never made it out to customers, a rough alpha version was tested as part of the July 2021 campaign product iterations but we were unable to dedicate the time or focus to make it a fully featured implementation. This is the original announcement on the HubSpot Community for the feature that shows merchant awareness and an overall overview of the solution: Display of the Marketing Hub - HubSpot Community.</p>	<p>We currently have nothing in research, in development, or in production for Front Door as we intentionally planned to research/validate a 2.0 strategy. Depending on the outcome of the research/iteration, we may be adding another automation-type that could be included in Front Door (in addition to existing automation-types like Sequences, Chatflows, etc).</p> <p>Problems</p> <p>"Automation" is not solely synonymous with Workflow. People do things that make manual processes less manual (e.g. email add-on for data formatting, A.I.).</p> <p>-> Intentional Research Report</p> <p>Automation in HubSpot goes beyond just workflows.</p> <p>In fact, there are many more flavors of automation such as Sequences (to help reps efficiently engage leads), Boon (to help teams scale their responses), Pathwork (to help customers get a pulse on their customer experience), Lead Scoring (to help marketers identify the best leads to nurture and handoff to Sales), and Sync (to integrate data between systems, automatically). Plus, with a robust CRM Architecture, the number of tools with automated functionality seem endless.</p> <p>It's great that we're offering customers a compo of options, but it's also a double-edged sword. In fact, identifying the best tool to use is an overwhelming decision for new customers and beginner automators, especially when the tools themselves are designed to spread across HubSpot, advanced to learn and do not immediately clear when to use which (or how to add even worse for that matter).</p> <p>Without a "front door," it's up to customers to familiarize themselves with all the disconnected automation tools that are available and identify which will meet their needs. This leads to slow adoption or never activating at all, as evidenced by the Adoption On Research and a related video. To further contextualize that advice that the majority of new adopters contributed their apprehensions to wanting to discover what was possible first and then plan for the future.</p> <p>"About" customers have not used any automated external assets within the first 6 months after purchasing Marketing Pro. This data is surprising because we know intuitively that using Workflows for automated lead nurturing is a big reason why customers buy Marketing Pro.</p> <p>-> Adoption On Research</p> <p>The Intentional Research further illuminated how decision fatigue plagued users throughout the planning phase. Making too many decisions related to automation is a barrier to overcome and the sooner we can win it, the better because customers are looking to automate more of their processes and at the same time, have low confidence that their existing automation tools are best suited for the tasks at hand.</p> <p>So, how might we help customers identify the right type of automation based on their needs, skillset, and comfort-level to save them from doing it manually on their own?</p>	<p>Finalized. It's called Tier under partner tool drop down.</p>
Have you finalized the name of this space, or is that in the works? If so, what is the customer-facing name?	data quality (in app) data quality comment center (loom / marketing)	We have not finalized a name for the space. Current working title is "Revenue Manager".	The customer-facing name is Prospecting. See more context in the JG Navigation Brief .	No. Conversations were had about the role of the name "Marketing Home" to the Hub-aligned of that name. It should then be a Service Home, Data Home, etc. We agreed that the name "Marketing Home" doesn't scale well.	No name is finalized. We are not married to any customer-facing name and are open to suggestions. We're just being referring to a Front Door internally.	Finalized. It's called Tier under partner tool drop down.
Who is the target audience for this space? What's the task, or the specific actions, that these customers can carry out in this space?	Operations Manager, Admin	The target user for this space are managers/operators responsible for revenue collection.	Target audience (Sales) non-representative for prospecting activities: sourcing, engaging and qualifying leads. Primarily B2B sales in the midmarket with <100 reps.	I see two user types utilizing the marketing home experience with customer-facing views that match their user needs: 1) Marketing manager - see a high level overview of their teams work, approval requests, campaign goals and performance. A specific action: Summary page 2) Manager - see what leads are due, see what other team members have worked on (activity feed), see individual campaign performance and campaign goals.	The hypothesized high-level outcome of Front Door is to inspire, educate and guide the user about automation tools that are available and identify which will meet their needs. This leads to slow adoption or never activating at all, as evidenced by the Adoption On Research and a related video . To further contextualize that advice that the majority of new adopters contributed their apprehensions to wanting to discover what was possible first and then plan for the future. <p>"About" customers have not used any automated external assets within the first 6 months after purchasing Marketing Pro. This data is surprising because we know intuitively that using Workflows for automated lead nurturing is a big reason why customers buy Marketing Pro.</p> <p>The Intentional Research further illuminated how decision fatigue plagued users throughout the planning phase. Making too many decisions related to automation is a barrier to overcome and the sooner we can win it, the better because customers are looking to automate more of their processes and at the same time, have low confidence that their existing automation tools are best suited for the tasks at hand.</p> <p>So, how might we help customers identify the right type of automation based on their needs, skillset, and comfort-level to save them from doing it manually on their own?</p>	HubSpot Solution Partners Be to action-driven. Provide Partners with data and transparency on how they are progressing within the program. Showing the client and product the breakdown, high growth-market clients, deal types, ensuring the client has paid in and the overall look preferred country of the Partner.

● My approach: Audit competitor experiences

Competitor analysis of page types

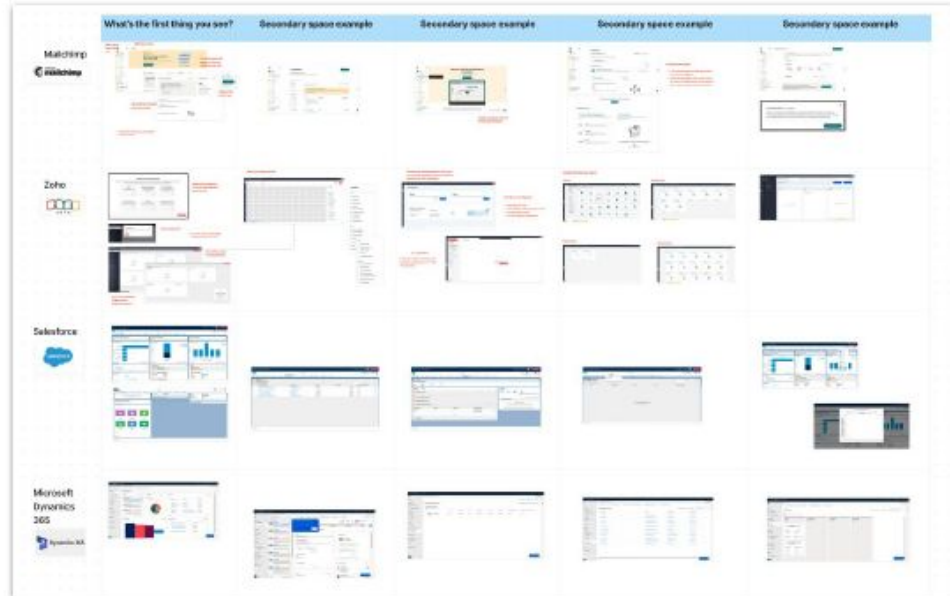
Competitors reviewed

- Mailchimp
- Zoho
- Salesforce
- Microsoft Dynamics 365

Findings

- Each of these apps are using a combination of “home base” page types to consolidate info around a specific tool, job task, or set of features
- Approaches varied for up-market and down-market competitors: customers grow with the product

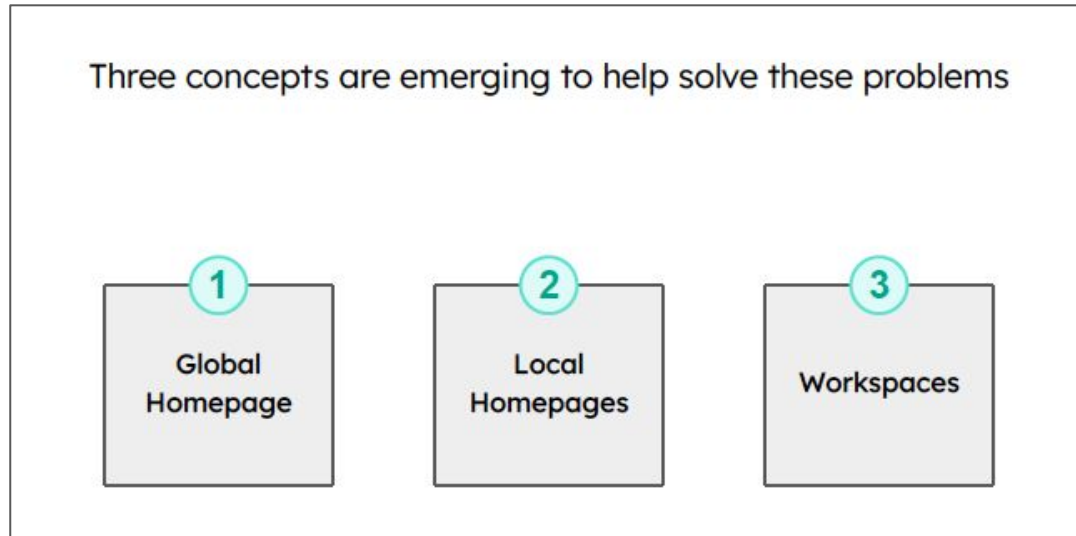
[Read the full analysis](#)



Proposal

● Proposal: Page types

Based on problem analysis, information gathered from teams, and the competitive audit, I started to outline three page types.



● Proposal: Local homepages

Local homepages are focused on a **specific job task or function**

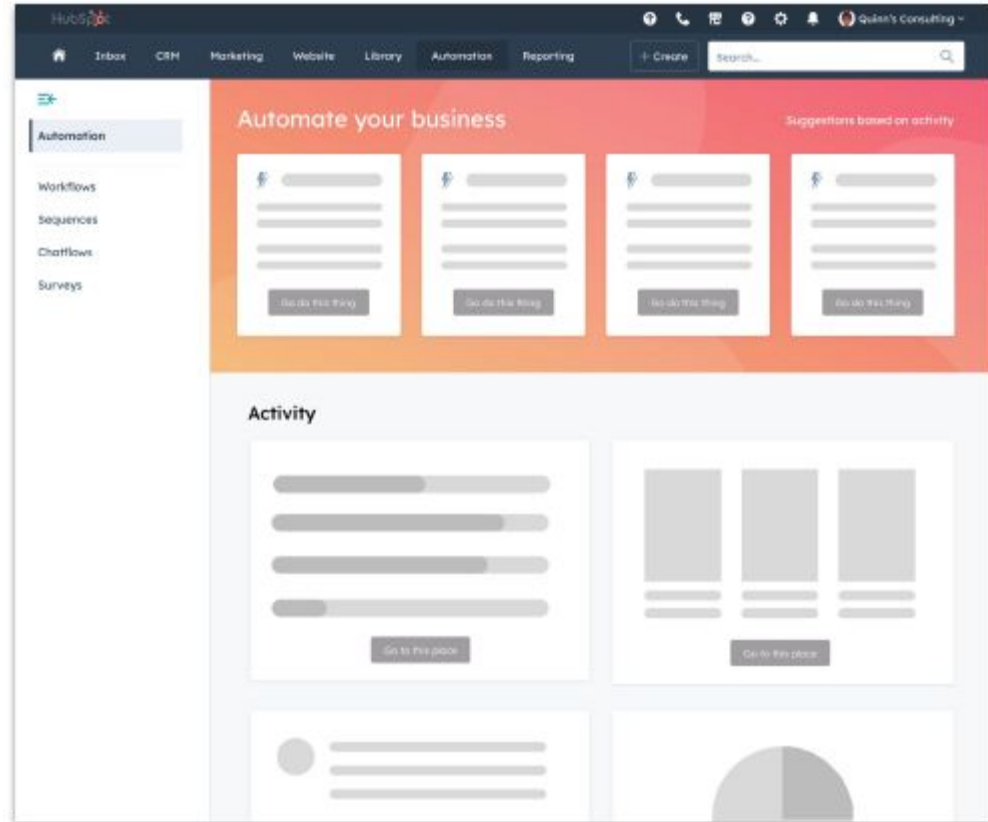
They're a place to deepen knowledge about a product area and learn about solutions

A place to “talk to customers” by providing account-based recommendations for next steps, new features, and upgrades

There can be multiple

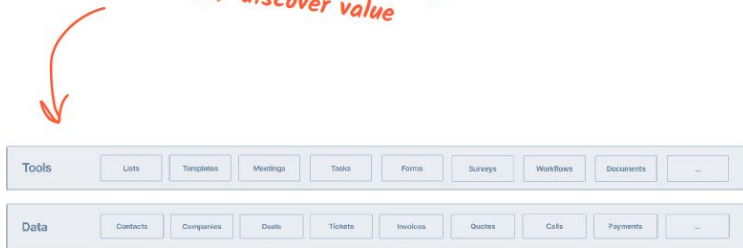
Goals

- Help the customer realize an increasing amount of value from a key category of HubSpot.
- Customers will harness the power of HubSpot earlier (faster time to activation)
- Customers will use more of HubSpot as their business scales (increased adoption)
- Reduced perception of complexity (increased CSAT)

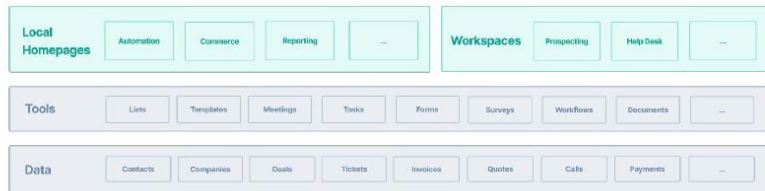


● Proposal: In the discovery model

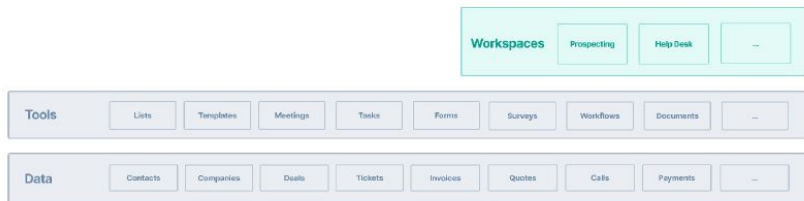
Today, our customers rely heavily on tools and data to (1) complete repetitive tasks quickly and (2) discover value



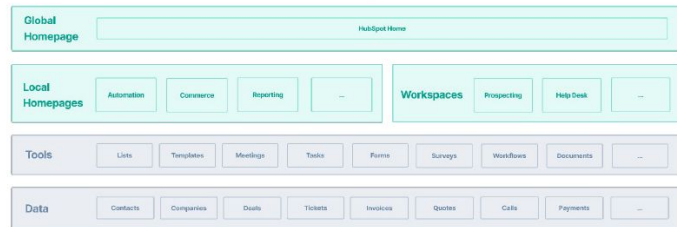
Local Homepages take pressure off of tools and data to discover value (at the feature set level)



Workspaces take pressure off of tools and data to complete repetitive tasks quickly



A Global homepage ALSO takes pressure off of tools and data to discover value (at the account level)



Next steps

● Next steps: Test our hypothesis

The global navigation team owned the home page. Some teams were already in progress validating the workspace model. We needed to focus on the local homepage question.

The Automation team was one of the teams proactively trying to solve problems of disconnection on their own. I partnered with another content designer on the Automation group to design a study and test our assumptions.

<p>Phase 1: Non-customer Surveys (full results)</p> <p>Purpose:</p> <ul style="list-style-type: none">• Understand what's most important to non-HubSpot users as it relates to automation and reporting use cases• Establish a baseline of data to build on for phase 2 of research• Find differences that may exist as it relates to skill savviness <p>Approach:</p> <ul style="list-style-type: none">• Surveyed 150 non-HubSpot automation and reporting participants using MUIQ<ul style="list-style-type: none">○ Users who self-identified as basic / intermediate users○ Users who self-identify as advanced users	<p>Phase 2: Customer co-design sessions</p> <p>Purpose:</p> <ul style="list-style-type: none">• Collect data and build on answer data from phase 1 research surveys with responses from HubSpot customers• Better understand what automation and reporting customer jobs/use cases are for their tools• Discover the types of information/content they would hope to see in a category-specific homepage <p>Approach:</p> <ul style="list-style-type: none">• Conducted 10 co-design sessions (5 automation, 5 reporting) with customers<ul style="list-style-type: none">○ Customers ranged from self-identified novices to experts in their feature category
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Results

● Results: Key differences between page types

What's the difference between page types?



Help me see...

Global home

- My most important **content, data, insights** from my **local homepages**
- Any **important product updates** and opportunities I need to know about

Local homepages

- **Shortcuts** to expedite my access to frequently-used tools and assets
- **Performance metrics** on my most important workflows, reports, campaigns, chatflows, etc.
- **Insights and recommendations** from HubSpot based on what it can see from my data
- **Alerts and notifications** about things I need to review

Workspaces

- **Actionable insights** that will help me know how to prioritize and execute today's work
- **Suggested activities** for the day with the added context I need to do my best work
- A place to **manage all of my category-related work** and see how my day, week, and even month could look

Results: Mock-up



● Results: Components recommendation

Key insights based on common areas of interest, like number of automations using a similar trigger, heavily-used assets, etc.

Prime visibility into what the team is working on. This could provide interesting metrics and insights for ops roles who need to see how teams are using HubSpot.

Automation shortcuts

Here are a few shortcuts to help you get started faster.

INSIGHT:
You have **34 workflows** using this email.
Don't forget to set up your customer portal



[Review this email](#)

INSIGHT:
This workflow hasn't had any enrollments in the last 30 days:
New customer onboarding



[Review this workflow](#)

DID YOU KNOW:
Your team created **13 new workflows** this week.



[Review workflows](#)



Manage your action sets [🔗](#)

Action set 1

Here's a description of the action set

Action set 3

Here's a description of the action set

Action set 2

Here's a description of the action set

Action set 4

Here's a description of the action set

[Show all automation tools ▾](#)

Concept only

Access to assets and components used when workflows are being created at scale. This could be a spot to tease action sets, filter sets (future), Create your own templates (future), etc.

Impact

● Impact: The highlights

💡 We socialized the decks in meetings and Slack channels across product and UX. We also started a dedicated Slack channel for teams interested in building a local homepages to collaborate and share findings. **This started a company-wide conversation about how we could create better alignment across experiences.**

👏 The work moving forward was officially sponsored by a VP in UX and officially assigned to the Growth and Discovery teams. Four teams across the company added local homepages work to their roadmaps. **Our recommendations for components would be further validated and implemented.**

🌟 Ultimately, **we brought life to the customer's voice while solving for a large business problem.**

Thank you for your time!