

## Podcast Script: Customization Design Tips

Welcome to this 60 second Sugar snippet. My name is Susie Williams and today we're going to talk about some best practices for designing your SugarCRM customizations. These tips focus more on ways to make sure your design meets your users' needs rather than on coding tips.

Since we had so much fun “counting down” tips in a previous podcast, let's bring back the Sugar Band to help us out again.

1. Make sure you develop, or at least test, your customizations on the same setup that your users will use. Most field sales reps have laptop computers, and their screen resolution will be different than what you see on a desktop machine. “Test drive” your work on a user's machine to make sure there are no issues with screen layout and to ensure that there are no clashes with hardware or software that is installed on the machine.
2. Spend a “day in the life” of a user to get a sense of how well your customizations meet his or her needs. Watch how your user works with the software. Use the time to identify what's working with your design and what areas you need to improve. You may find some best practices that you can share with the whole group, or identify some areas where more training needs to occur.
3. Keep an open communication line flowing from your users for suggestions and improvements. Often the best ideas come from those people who are using the software day in and day out. Set up an email alias for suggestions, but also make yourself available via regular meetings. Get invited to the sales team's meeting and present a tip of the day or give an update on a new feature. Ask for feedback and listen to the comments.
4. Plan to reassess your company's business needs on an annual basis. Companies change—they grow, they shrink, they merge, they evolve. The customizations that were imperative a year ago may not be so important today. It's a good practice to re-examine your customizations when you upgrade to the next major version of the software. You can decide to throw out modifications that don't make sense any more, and can scope and plan new modifications based on the software's new capabilities and your company's current needs.
5. Remember to design enhancements for all of your users, not just the ones who scream the loudest. Make sure you include improvements for managers and users, sales reps and marketing folks, whoever is using your software on a regular basis.

There are more tips to come, but for now, that's your 60 second Sugar snippet. Goodbye!