

Case Study

Enterprise solution for cannabis retailers

Nicole Dupré / December 2023

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About Treez

- Technology and insights to the cannabis industry
- 2016, launch POS solution.
- Expanded to Insights (Analytics) and Payments.
- Serving 500+ stores across 12 states, capturing 15% of the market.
- Integrated with 275+ partners (loyalty, e-commerce, fintech, etc.).
- Market shift: From small "mom & pop" shops to larger operators.



Context

HMW

How might we simplify and enhance our software's user experience to seamlessly support retailers as they grow from small to large-scale operations?

My role

Summary

In my role as the company's first designer, I was tasked to define a comprehensive UX framework, develop a robust Design System, and enhance the user experience for a multi-store, multi-state enterprise platform.

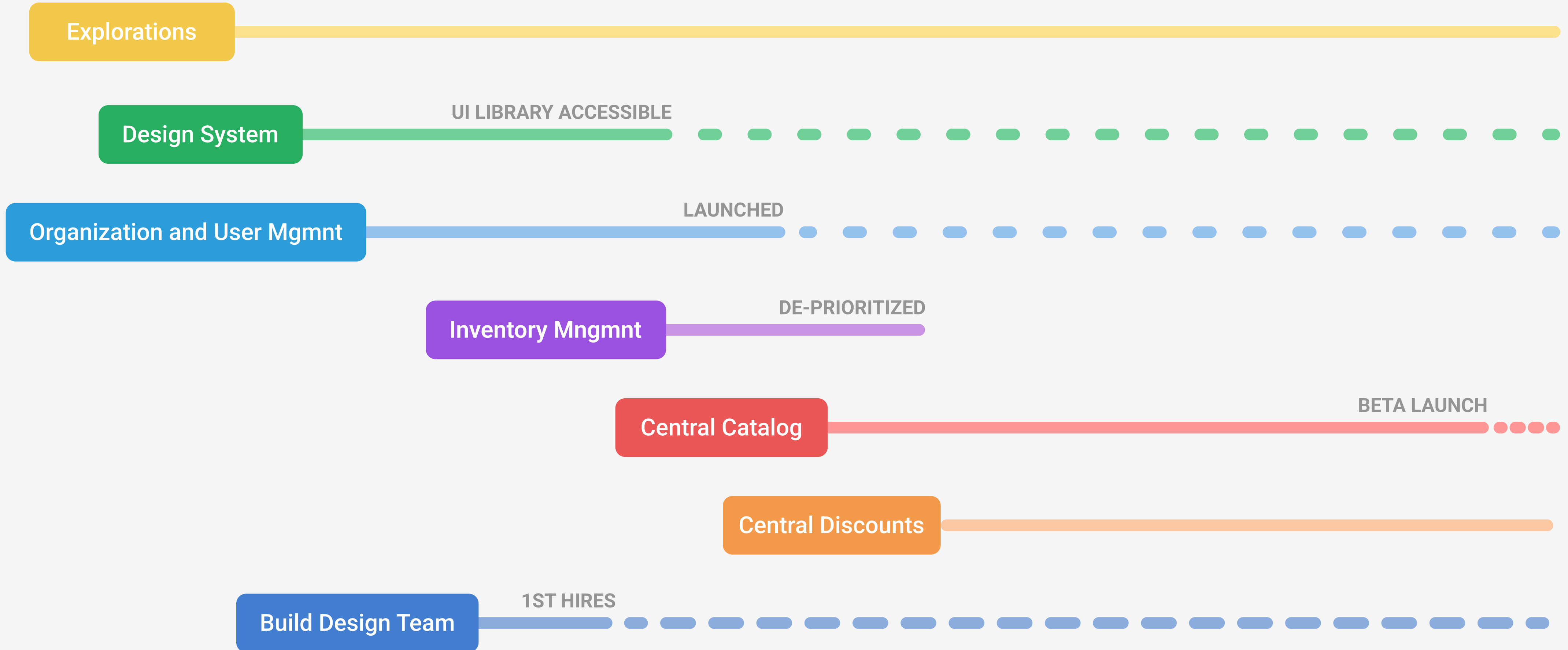


My role

Jan '22

Jan '23

Oct '23



Central Catalog

Project Summary

Aligning to one of the business priorities to scale the product to target ICP of multi-store operators, Central catalog was identified as a key feature that deeply hurts at our customers at a data label, operational efficiency and profitability.

BoH - Back of the house squad

Product Owner (1)

Product Manager (1)

Eng Manager (1)

Back end /Front end (9)

Q&A team (3)

Marketing Manager (1)

Delivery Manager (1)

Executive sponsor (1)

Implementation Manager (1)

Customer success Manager (1)

UX/Product Design (2)

Discovery & Definition

Research Findings

Challenges in product card creation

Currently, it takes approximately 2-3 minutes to create a single product card. Most often, we depend on the brands to supply the necessary information and assets. We find it particularly challenging to obtain complete data from smaller brands.

Search is key feature

Operators carry thousands of SKU's, each time they purchase and receive items they need to associate it with a product card. Normally searching by Brand, Category, Subcategory and Name.

Operational redundancy

If an operator with 10 stores stocks a product in each location, they must create a separate entry for that product in every store. Additionally, if the product has different variants, each variant must also be created as an individual product in each store

No easy way to quickly identify dupes

Effective catalog maintenance requires time spent on identifying and eliminating duplicate entries to ensure data accuracy and completeness.

Data quality

Data quality is crucial to ensure we have high-performing product cards that provide necessary information to our consumers and staff, aiding in sales conversion. It's also essential for maintaining compliance in my stores.



BIO

Caroline runs a **multi-store cannabis retail chain** and is in charge of creating, organizing, and maintaining the product catalog. The information around products managed here is consumed by budtenders at the POS, consumers on their eCommerce website, Weedmaps, data in AskTreez, as well as other integrations and data consumers.

She often takes product data and images from distributors / brands and copies the data into her product shells within their organization catalog. For an advanced operator, product data will live in an ERP and be brought into Treez via an integration.

INTEREST

- Know what tasks to do for the day
Knowing popular brands and best sellers
- Organized menus and collections
- Product card performance related with sales
- Suggestions for potential collections or product lines
- Brand updates

NEEDS & GOALS

- An easy way to manage information on hundreds of products
- Educating budtenders on new products and brands
- Know how many duplicates exist
- Anticipate what are my action steps
- Keep my data clean
- Manage products in one place, one tool

PAIN POINTS

- No idea how many duplicates exist
- Repetitive actions
- Hard to keep up with so many product shells
- Managing product duplicates is time-consuming and a manual process
- Inconsistent in-store and ecom experience
- No clue which products lack images, descriptions, etc.

Caroline Catalog Manager

Location: Phoenix, Arizona

Age: 33 years old

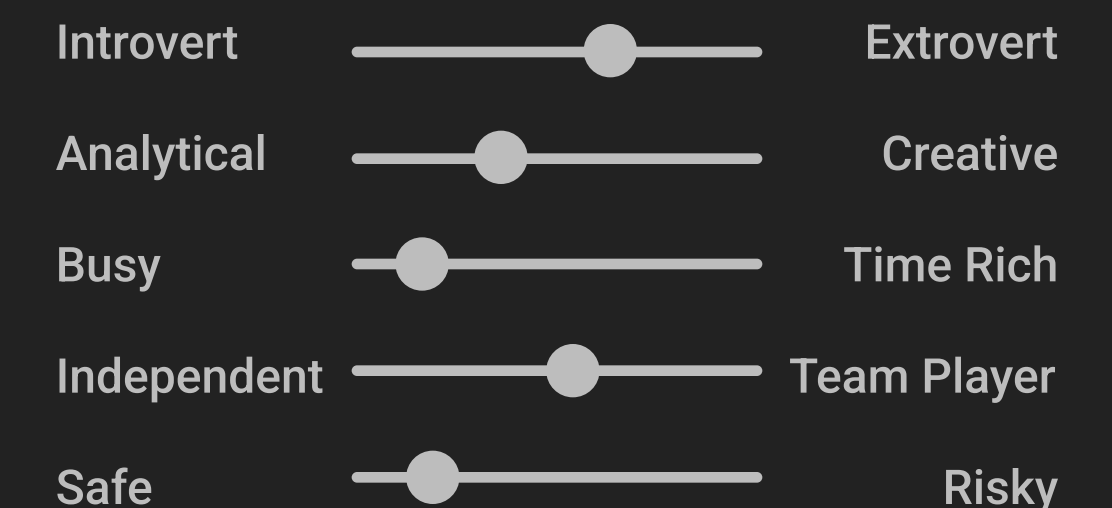
Education: Bachelor degree

Module: Product Management

Primary Device: Desktop

“ I need a way to easily create and maintain product shells to keep my budtender’s educated and up to date about our offer and keep inventory stocked with hot products I know consumers will love.”

Personality



Discovery & Definition

If Caroline needs to create products...

- Across **10 stores**
- Carries **1,000 products** per store
- Each product has **3 variants**
- Takes **3 minutes on average** to create each variant as separate products

90,000 min. / 1,500 hrs. / 187.5 days

Discovery & Definition

Focus of this workstream

Project objective

Reduce the amount of **time that takes**
to add a product across locations.

Product goals

Streamline the creation and eliminate redundancy

Consider the creation of a centralized catalog where the data model considers 1 card used by all stores.

Support to gather quality data/create selling product cards

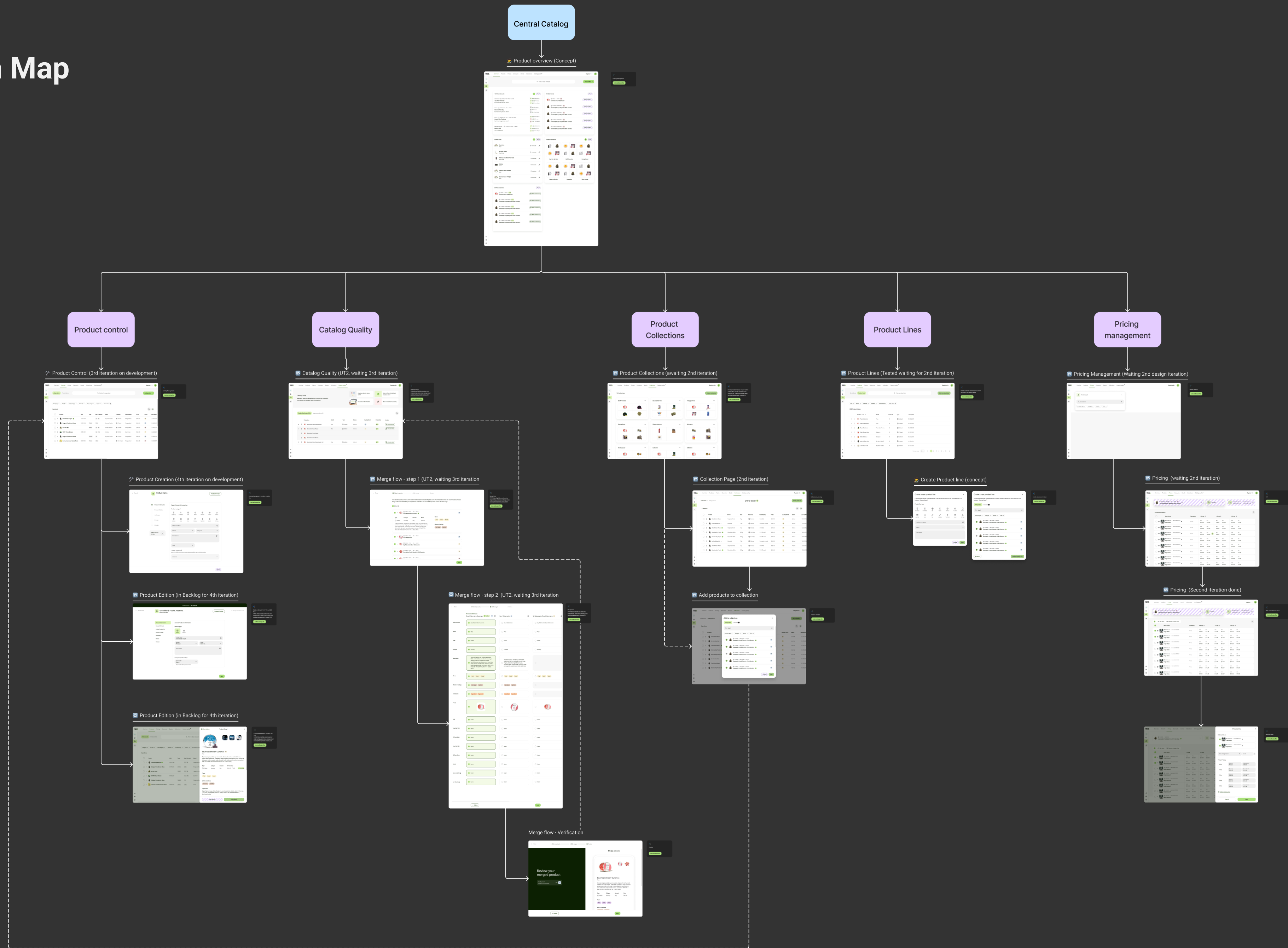
Present the form in a user friendly way, taking in consideration cognitive load, information aid, visual signifiers/gamification

Make visible the health/quality of the catalog

Help user clean and improve the data by reducing duplicates and low performing product cards

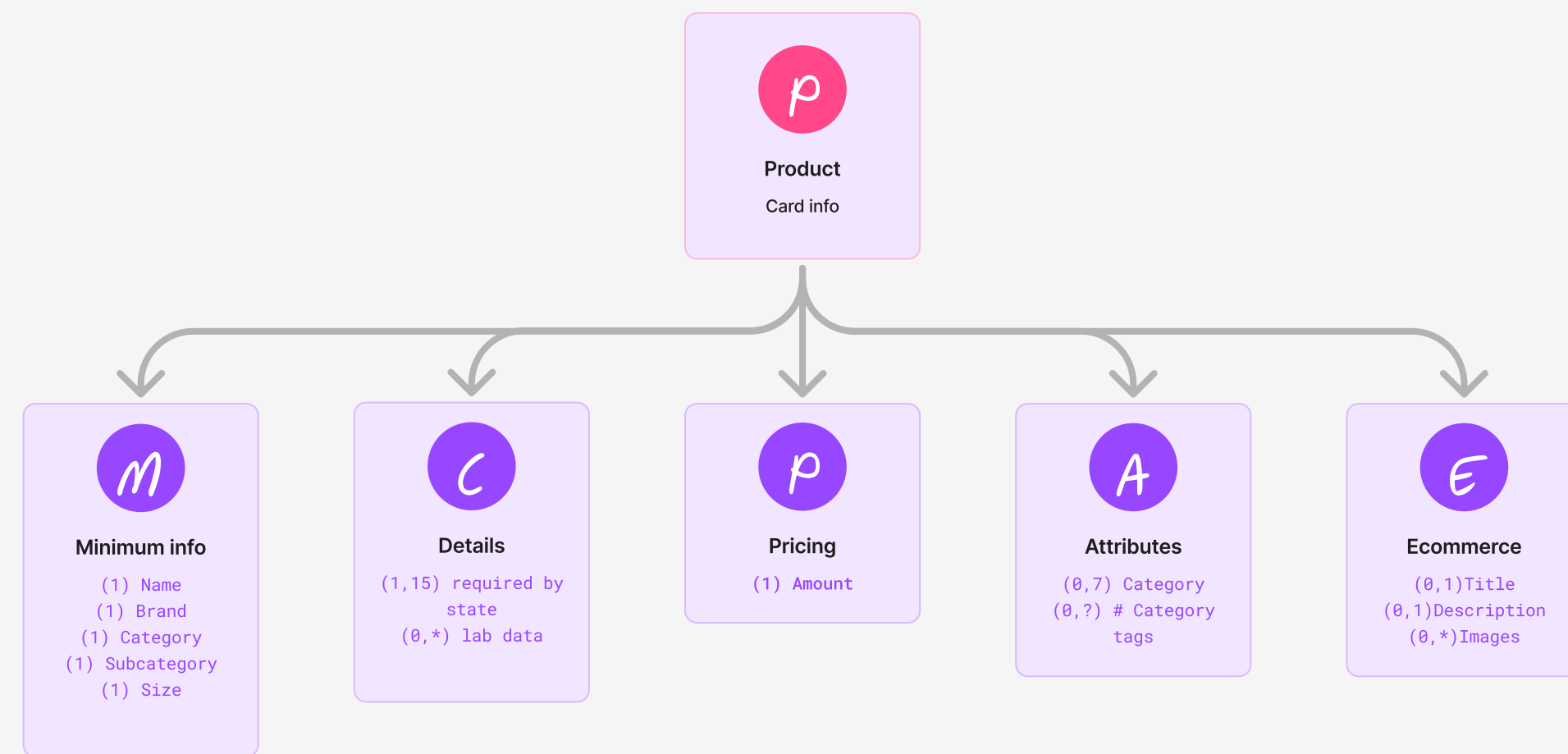
Ideation, prototyping and Testing

Navigation Map

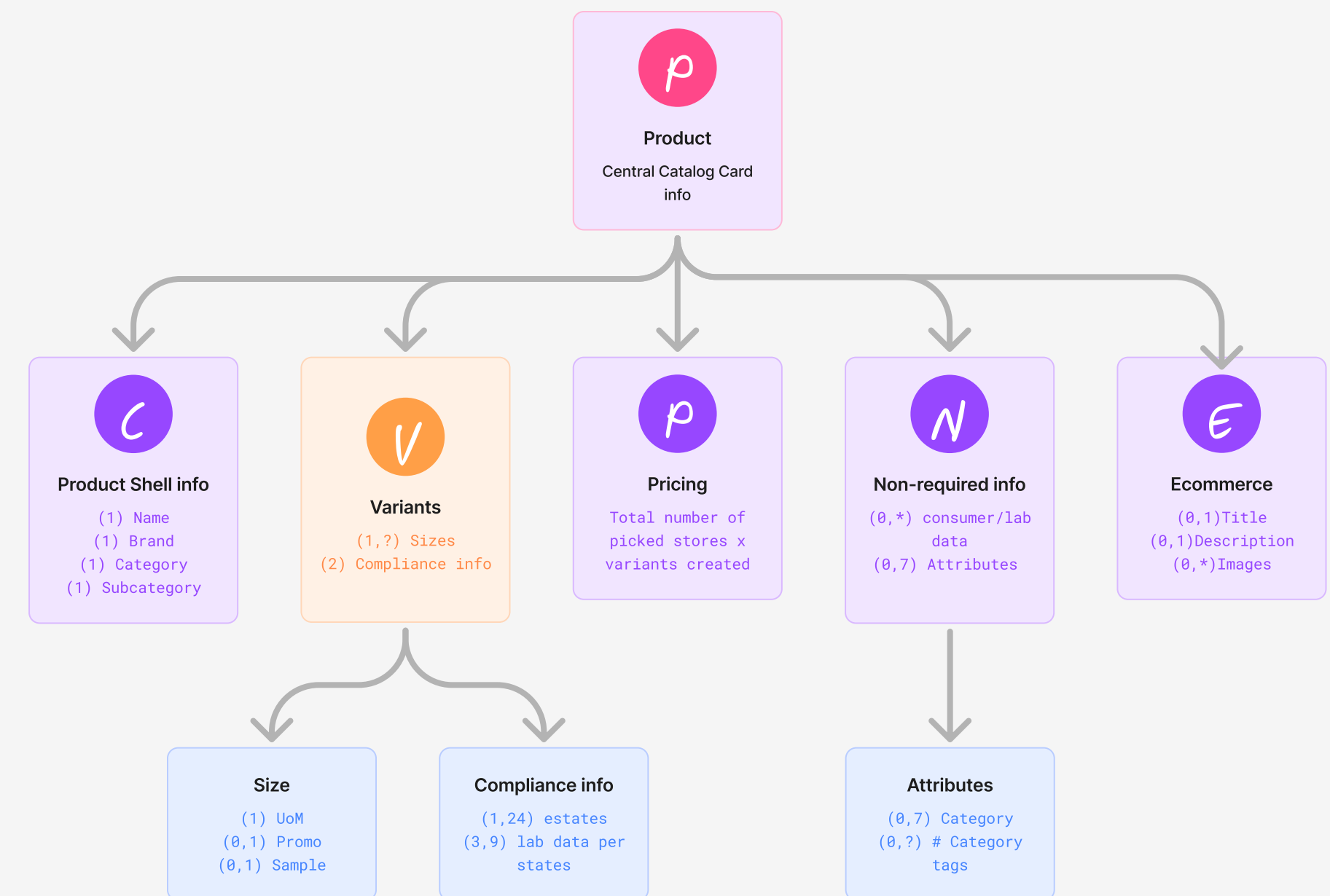


Product card data per section according to creation and edit flows

STZ - Legacy



Latest version of Treez



Step 1 - Core product information

4th iteration (Post MVP)

Save & Close

Product name

Product Preview

Changes have been saved

- Product information
- Variants
- Attributes
- Pricing
- Images

Parent product information

Select product category*

BEVERAGE CATRIDGE EDIBLE EXTRACT FLOWER MERCH MISC

NON-INV PILL PLANT PREROLL TINCTURE TOPICAL

Product name* ⓘ

Sub-category* Brand*

Description ⓘ

Classification Strain

Extraction Method Unit of measure (UoM)* ⓘ

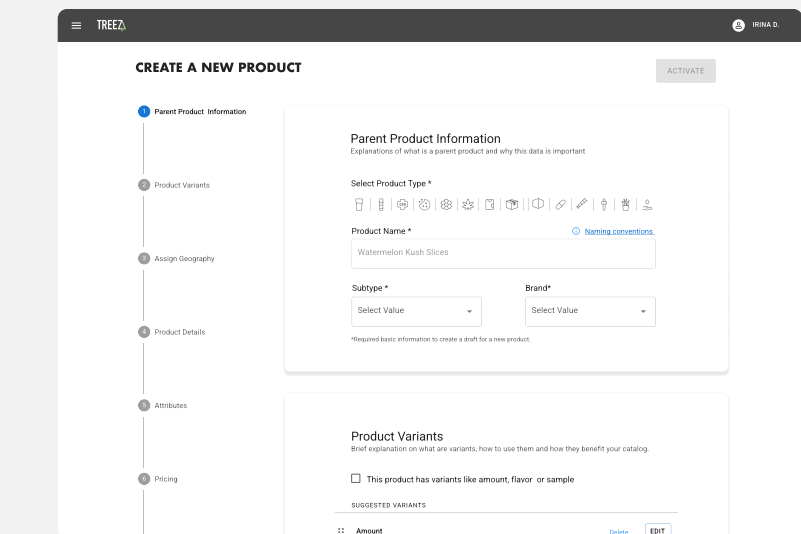
This field will automcoplete upon category selection

Fields marked with an asterisk (*) are required to activate your product. You can save the product as a draft, but you won't be able to activate unless these fields are completed.

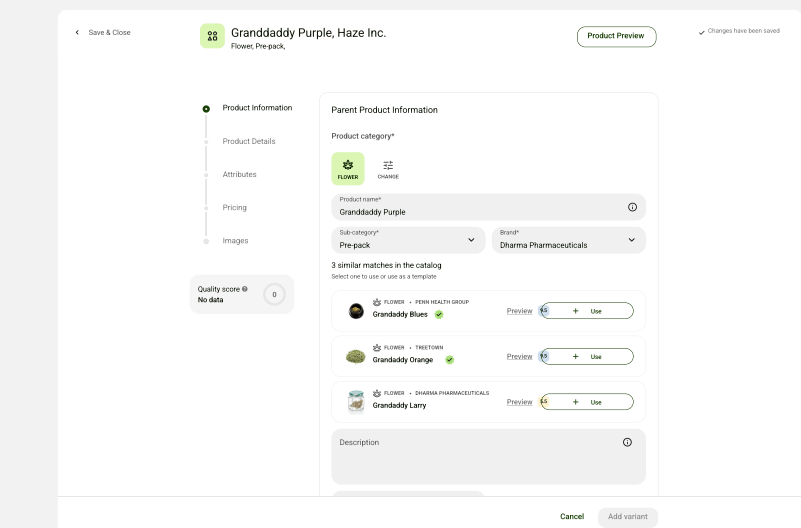
Cancel Add variant

Previous Iterations

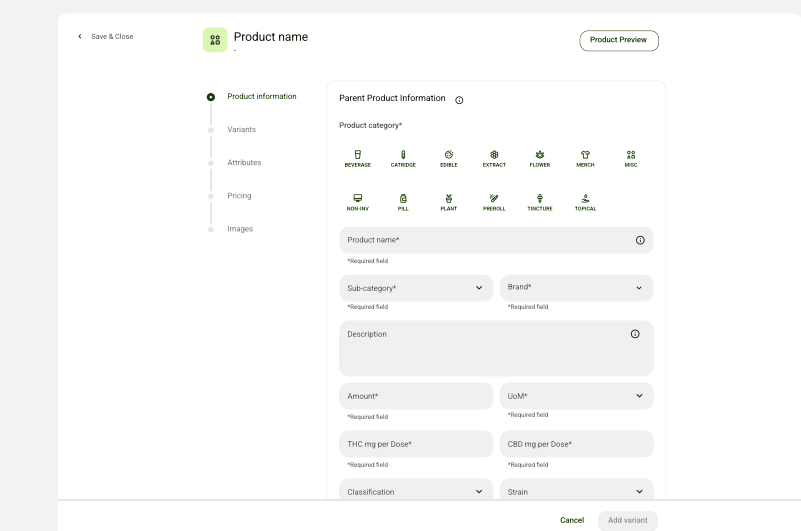
Wireframes - 1st iteration



2nd iteration



3rd iteration (MVP)



Step 2- Variants

4th iteration (Post MVP)

Save & Close

Pineapple Jalapeño
Beverage, Social Tonic, by Cann

Product Preview ✓ Changes have been saved

12 pack Promo Sample Delete

- Product information
- Variants**
- Attributes
- Pricing
- Images

Variant details

Total mg THC* 24 mg	Total mg CBD 48 mg
Doses 12	Net Weight (fl oz) 96
SKU	

+ Add SKU

Use external ID

E-commerce Menu Information Hide from menu

E-commerce Menu Title
Lemon Lavender Social Elixir

Use global description

Description
Lorem ipsum dolor sit amet, consectetur adipiscing elit. In a erat sit amet orci consectetur ullamcorper. Quisque ullamcorper pharetra lacus quis finibus. Vestibulum dignissim justo non lectus malalte

Samples and Promos

Add a sample item for this variant

A variant with the type "Sample" will be added to your catalog, you can choose to show it or hide it from the menu independently from the main variant and add unique SKU's.

Menu settings Hide from menu

Cancel Add variant

Previous Iterations

Wireframes - 1st iteration

2nd iteration


3rd iteration (MVP)

Product card

Product details

View history Product Detail

This product is deactivated — Activate



FLOWER • PRE-PACKED • PACIFIC STONE • HYBRID • 805 GLUE

805 Glue Hybrid

Global Description

Afternoon Delight cannabis flower preroll: expertly crafted with premium strains, ground and rolled to perfection. Delivers smooth, flavorful smoke with enticing aroma. Elevate your senses and experience euphoria. Unforgettable journey awaits.

Variants Edit pricing

3.5 Gram \$ 20.00 - \$23.00 1/8 Oz SKU 5...678, H...69H	7 Gram \$ 40.00 - \$423.00 1/4 Oz SKU 5...678, H...69H	Sample 7 Gram \$ 0.00 1/4 Oz SKU 5...678, H...69H
14 Gram \$ 80.00 - \$83.00 1/2 Oz SKU 7...Hg8, H...LJK, G...gHb	Sample 14 Gram \$ 1.00 1/2 Oz SKU 7...Hg8, H...LJK, G...gHb	

Aroma

Sweet flower Woody Pine Fruity Citric

Effects

Edit product Activate product

Creation preview

Editing product — See history log

Page name **Pineapple Jalapeño** Beverage, Social Tonic, by Cann Changes have been saved

Check out your new product!


Your product has the minimum required information in order to be activated. You can take it to the next level by completing the information in following steps

Attributes Add attributes

Pricing Add retail price for your variants

Images Add more images

Preview



BEVERAGE • ELIXIR • CANN • HYBRID • 805 GLUE

Pineapple Jalapeño

Global Description

Afternoon Delight cannabis flower preroll: expertly crafted with premium strains, ground and rolled to perfection. Delivers smooth, flavorful smoke with enticing aroma. Elevate your senses and experience euphoria. Unforgettable journey awaits.

2 Variant descriptions

Variants

3.5 Gram \$20.00 - \$23.00	7.5 Gram \$40.00 - \$43.00
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Back to [#Step] Activate Save and close

E-commerce view

GARDEN of EDEN Shop Club Eden Events Discounts What are you looking for? Welcome Nicole

Home > Recommended > Pineapple Jalapeño

Verified

BEVERAGE • TONIC • CANN • HYBRID

Pineapple Jalapeño

4.6 / 5

Tropical, warm, and just a touch spicy, Pineapple Jalapeño will help you find your beach (even if you can't fly to it right now). This limited edition flavor is a party starter, so don't miss out on the fun. 2mg of THC & 4mg of CBD in each can

Select size

6 PACK 12 MG THC 6.8 Fl Oz	12 PACK 24 MG THC 6.8 Fl Oz	24 PACK 48 MG THC 6.8 Fl Oz	36 PACK 72 MG THC 1.7 Fl Oz
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\$ 129.95 ~~\$ 20.00~~ 25% Off

Select quantity 0 Add to cart

Effects

Happy Euphoric Relaxed Relaxed

Flavor

Jalapeño Pineapple

Ingredients

Cannabis extract Agave nectar Carbonated water Pineapple juice
Natural jalapeño flavor Lime Juice

Customer Reviews

VIEW BY Size Date of review Date of review See all 125 reviews

BASED ON 125 REVIEW **4.6 / 5**

COMMON EFFECTS BASED ON **80%** of users reviews


Arman Rokni 1 day ago Verified purchase

Reported effects: Relaxed Happy

"Love this flavour - it has a nice little kick of spice and goes down smooth with a beautiful pineapple finish"


Dashboard

Nested view

TREEZ Product Control Pricing Management 


Catalog > Product Control Add Product

9999 Items Category Subcategory Brand Classification More Filters Search

<input type="checkbox"/>	Product	SKU	Type	Size / Amount	Brand	Category	Subcategory	Base Price
<input type="checkbox"/>	Original TranWreck Maxx	<u>5</u>		1g 3.5g 7.5g	Terpene Tanks	Flower	Pre-packed	\$60.00 - \$70.00
<input type="checkbox"/>	Original TranWreck Maxx	<u>X...hjk</u>		1g	Terpene Tanks	Flower	Pre-packed	\$60.00
<input type="checkbox"/>	Original TranWreck Maxx		Promo	1g	Terpene Tanks	Flower	Pre-packed	-
<input type="checkbox"/>	Original TranWreck Maxx	<u>3</u>		1g	Terpene Tanks	Flower	Pre-packed	\$70.00
<input type="checkbox"/>	Original TranWreck Maxx	<u>X...hjk</u>		3.5g	Terpene Tanks	Flower	Pre-packed	\$70.00
<input type="checkbox"/>	Original TranWreck Maxx	<u>1...Gfg</u>	Sample	3.5g	Terpene Tanks	Flower	Pre-packed	\$70.00
<input type="checkbox"/>	Original TranWreck Maxx	<u>Link label</u>		7g	Terpene Tanks	Flower	Pre-packed	-
<input type="checkbox"/>	AC/DC CBD	<u>10</u>	Sample	1g 3.5g 7g	Jonny Chronic	Flower	Pre-packed	\$55.00 -70
<input type="checkbox"/>	Granddaddy Purple 	<u>2</u>	Promo	12oz	Camino	Flower	Pre-packed	\$55.00 -70
<input type="checkbox"/>	'Chill' Citrus Breeze	<u>X...GhY</u>	Promo	12oz	Terpene Tanks	Flower	Pre-packed	\$55.00 -70

< 1 2 3 4 5 ... 30 >

Itemized view

TREEZ Product Control Pricing Management 

Catalog > Product Control Add Product

9999 Items Category Subcategory Brand Classification More Filters Search

<input type="checkbox"/>	Product	SKU	Type	Size / Amount	Brand	Category	Subcategory	Price	Status
<input type="checkbox"/>	Original TranWreck Maxx	<u>2</u>		1g	Terpene Tanks	Flower	Pre-packed	\$60.00	Active
<input type="checkbox"/>	Original TranWreck Maxx		Sample	1g	Terpene Tanks	Flower	Pre-packed	\$60.00	Active
<input type="checkbox"/>	Original TranWreck Maxx		Promo	1g	Terpene Tanks	Flower	Pre-packed	\$60.00	Active
<input type="checkbox"/>	Original TranWreck Maxx	<u>X...hjk</u>		3.5g	Terpene Tanks	Flower	Pre-packed	\$60.00	Active
<input type="checkbox"/>	Original TranWreck Maxx		Sample	3.5g	Terpene Tanks	Flower	Pre-packed	\$60.00	Active
<input type="checkbox"/>	Original TranWreck Maxx	<u>4</u>		7g	Terpene Tanks	Flower	Pre-packed	\$60.00	Active
<input type="checkbox"/>	AC/DC CBD	<u>h...H7G</u>		1g	Jonny Chronic	Flower	Pre-packed	\$60.00	Active
<input type="checkbox"/>	AC/DC CBD		Promo	1g	Jonny Chronic	Flower	Pre-packed	\$60.00	Active
<input type="checkbox"/>	AC/DC CBD	<u>h...H7G</u>		3.5g	Jonny Chronic	Flower	Pre-packed	\$60.00	Active

< 1 2 3 4 5 ... 30 >

What is the MVP to provide value?

First release

- Creation of a central product shell
- Integration of variants
- Promo items and sample items
- Base pricing
- Pricing management
- Statuses: Draft, Active, Deactivated
- History log
- Import tool

Future releases

- Catalog manager inventory landing dashboard
- Catalog quality
- Product rating
- Duplicate recognition
- Merge functionality

What is the MVP of a Verified Catalog?

Data

- Curated information
- 5000 top performing SKU's in CA
- Images as the data that is most difficult for retailers to obtain and showcase with consistent aesthetics

Format

- Import Excel
- Png/Jpg images
- No UI

What is the business impact?

Ensuring data accuracy and reliability, empowering retailers with a trusted master database, elevating the shopping experience across states. This work led to a strategic partner with one of the two state compliance systems MTRC, eliminating the need for time-consuming data uploads and maintenance across the supply chain. This initiative sets new data integrity standards and drives efficiency, innovation and leadership in the cannabis industry.

Success Metric

Caroline creates “product shells” with variants

- In 1 central catalog
- for **1,000 products** across stores
- Adds **3 variants** to each product
- Takes max **30 secs** to add each

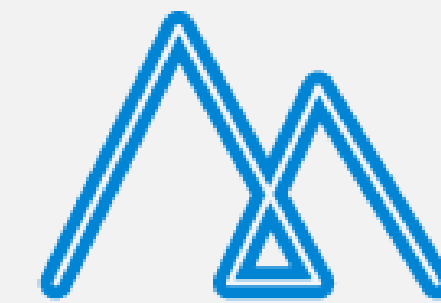
4,500 min. / **75 hrs.** / **9.3 days**

↓ **95%**

What would I've done different?

- Initiate a collaborative approach by **integrating the design team with the Catalog Engineering team** right from the project's inception.
- More Low-Fidelity / wireframe iterations **focusing on de data.**
- Establish a dedicated “Customer Guild” – a group of select users who **provide regular feedback** throughout the product development process

Thanks :)



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