

Focus on First Use

Kylie Tuosto & Stephen Gay

#focusonfirstuse
#sfdw

Today's Agenda

Meet & greet

Our Story

Exercise 1: Mapping the Journey

Exercise 2: Measuring the Benefit

Exercise 3: Delivering Delight

Wrap Up

Happy Hour

Hello!



Mirabel Bradley



Courtney Sandlin



Stella Zubeck



Kylie Tuosto



Stephen Gay



Jennifer Cordova



Amanda Hippe

Our Story

Connecting the micro-task to the macro-benefit



Introduce Intuit & QuickBooks Products

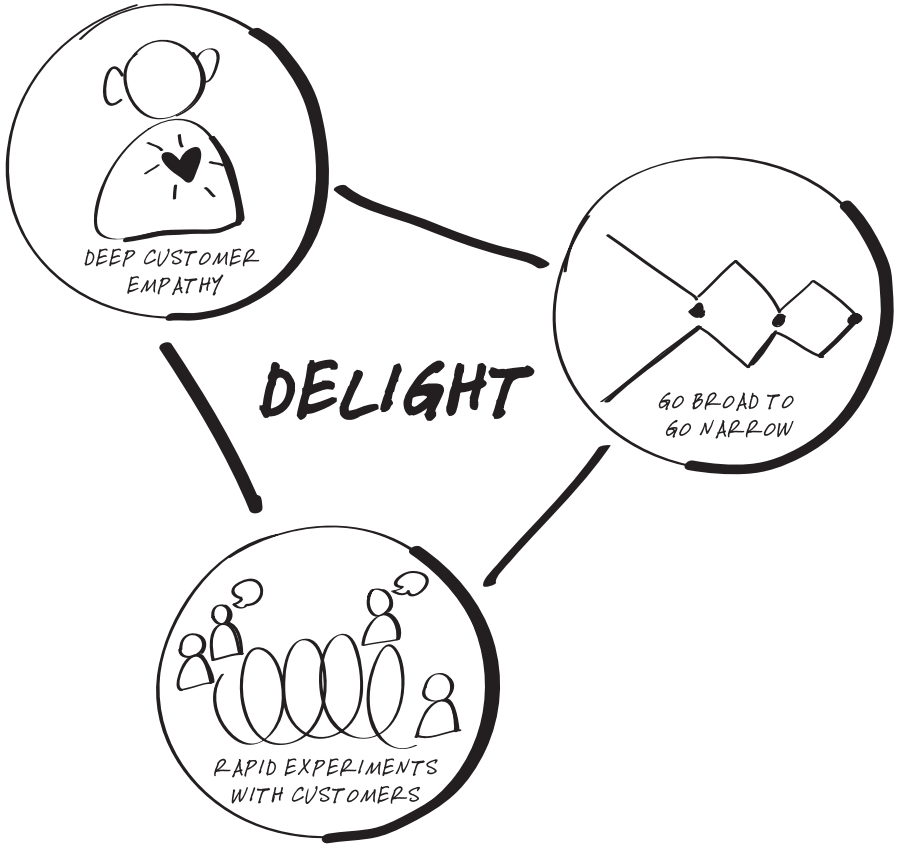








Design for Delight at Intuit



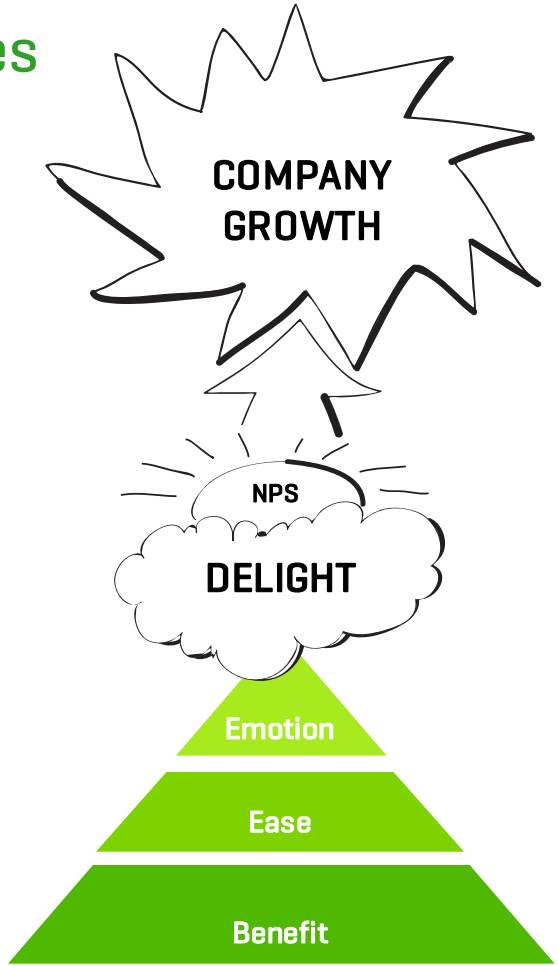
Awesome Product Experiences



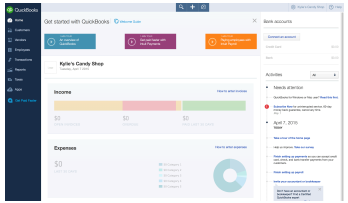
INTUIT APEX PYRAMID

LIKE MASLOW'S NEEDS, WE NEED TO DELIVER ALL THREE TO SUCCEEED.

Awesome Product Experiences

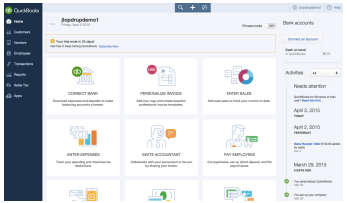


Our Story



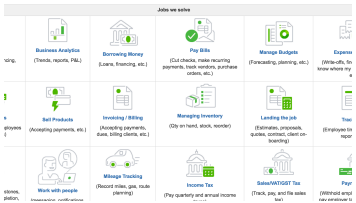
June 2015

TASKED WITH IMPROVING THE QUICKBOOKS ECOSYSTEM FIRST TIME USE EXPERIENCE



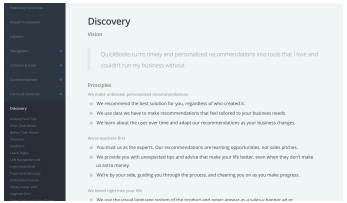
Dec 2015

LAUNCHED TEST FOCUSED ON INCREASING ENGAGEMENT WITH **TASKS**



Jan 2016

LAUNCHED TEST FOCUSED ON INCREASING ENGAGEMENT WITH KEY **JOBS**



Mar 2016

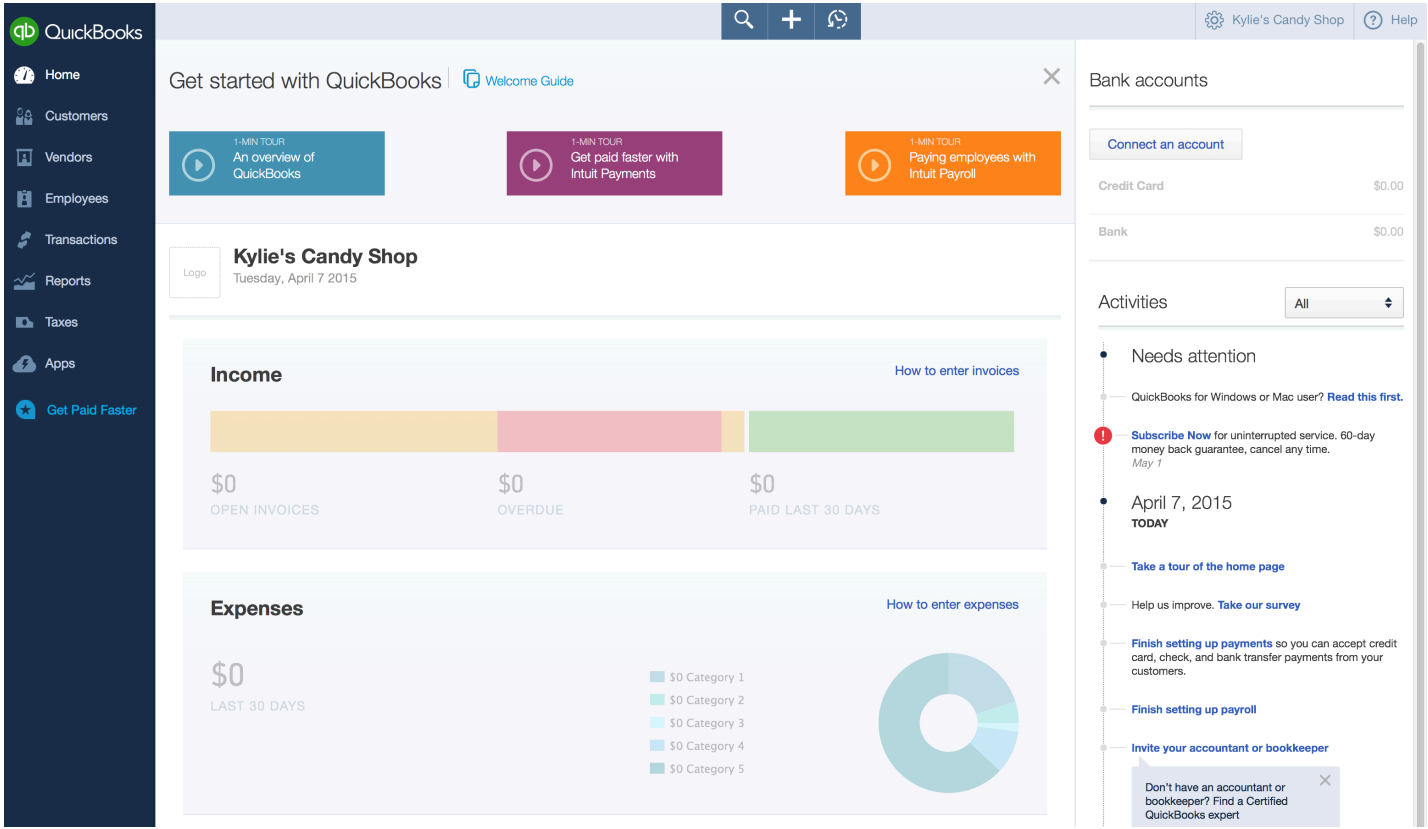
DEVELOPED AND TESTED A SERIES OF FIRST USE **PATTERNS** TO IMPROVE THE CUSTOMER EXPERIENCE

Coming soon!

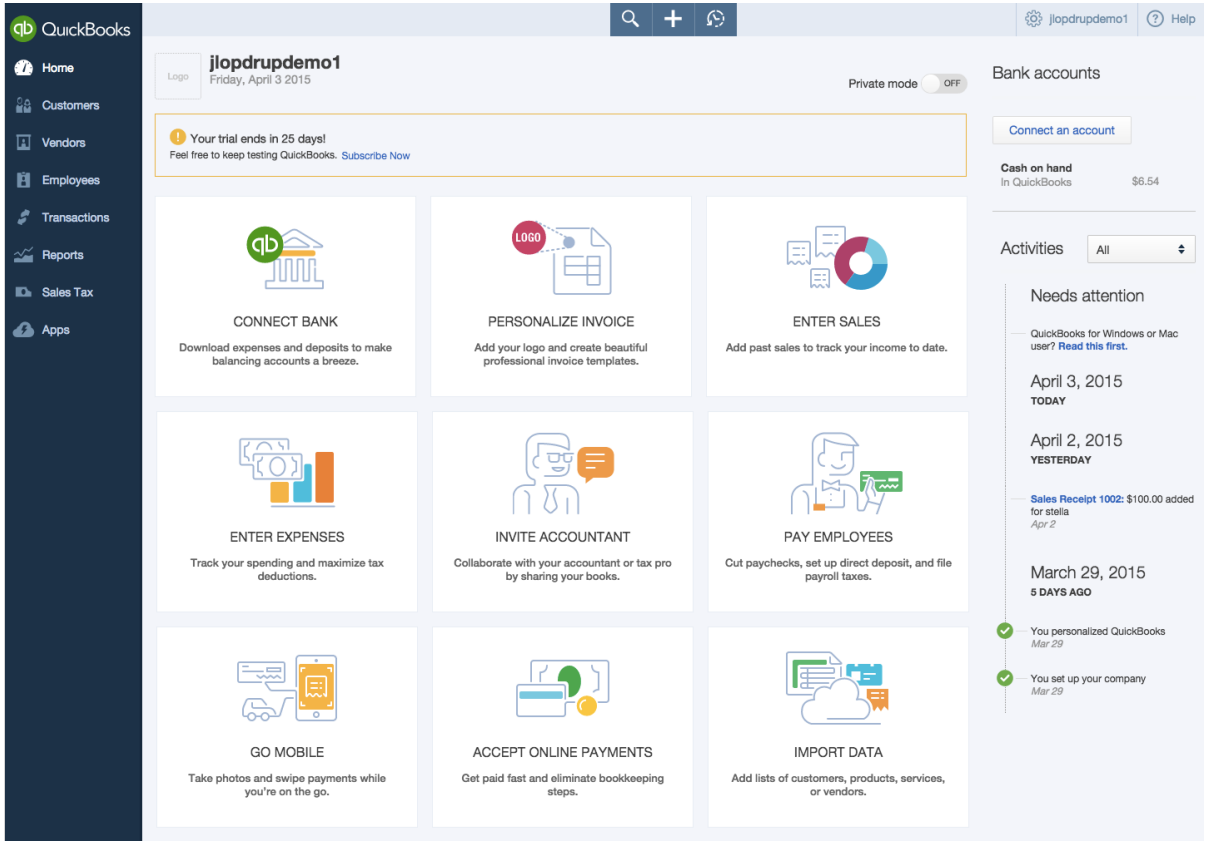
2017

FOCUSED ON END TO END FIRST TIME USE EXPERIENCES FOR KEY **JOBS**

Where We Started



Task-Focused Experiment



Job-Focused Email Experiment

Accounting

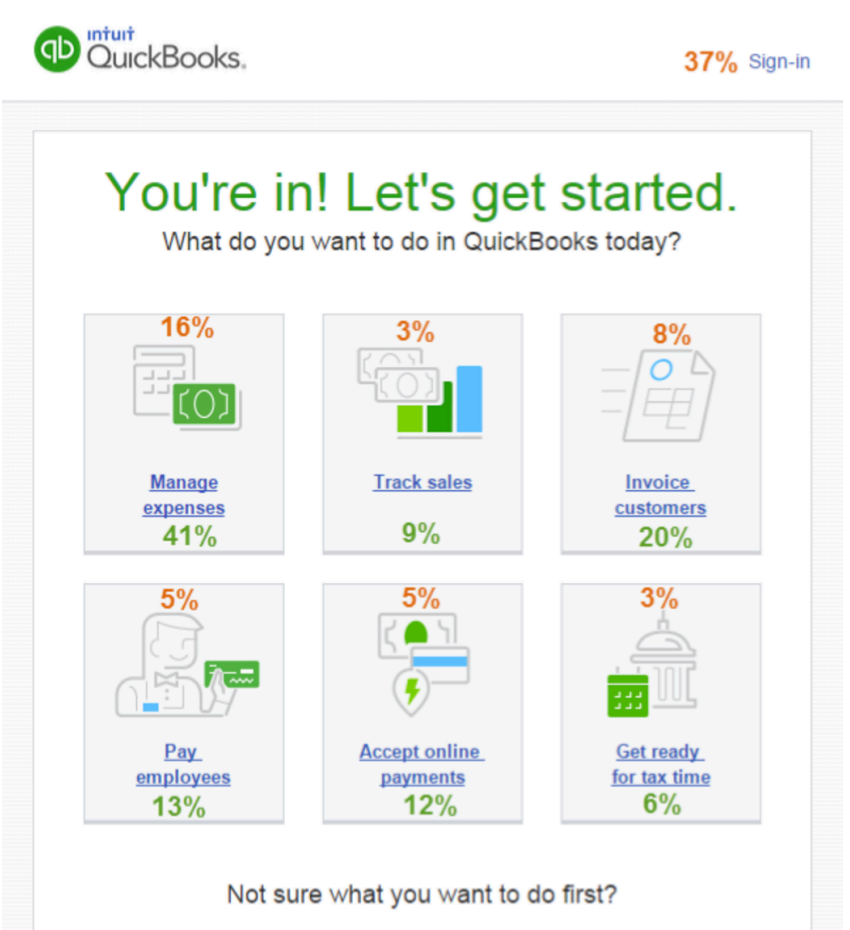
Borrow Money

Pay Bills

Pay Employees

Manage Inventory

Expense Tracking



Definitions

BENEFIT

What the user achieves when they complete one or more jobs

EXAMPLE: PAYROLL IS DONE

OFFERING

A market-ready solution for one or more jobs

EXAMPLE: PAYING EMPLOYEES + PAYROLL TAXES = PAYROLL OFFERING

JOB

A core function the user wants to complete, made up of several tasks

EXAMPLE: PAYING EMPLOYEES

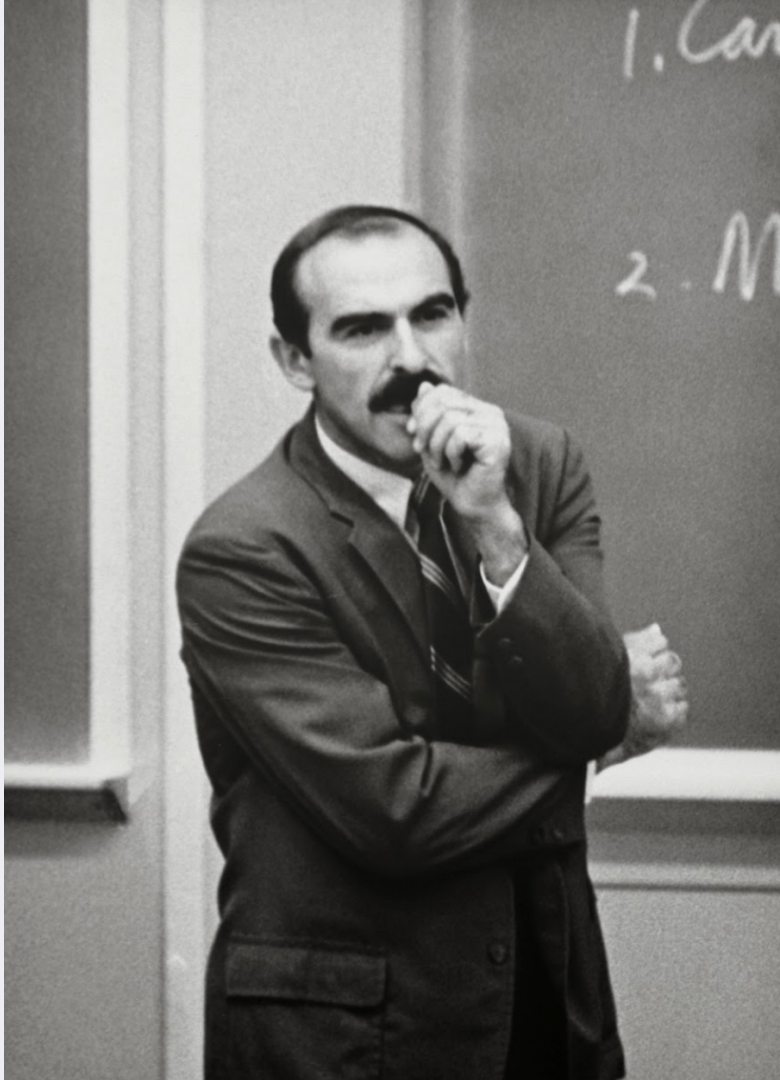
TASK

One of several steps a user needs to take to accomplish a job

EXAMPLE: ADDING A NEW PAY TYPE

People don't want a quarter-inch drill, they want a quarter-inch hole.

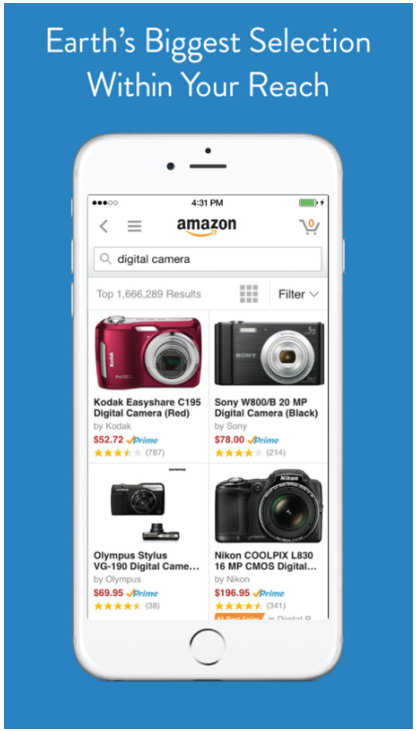
– Theodore Levitt
Economist & Harvard Business School Professor

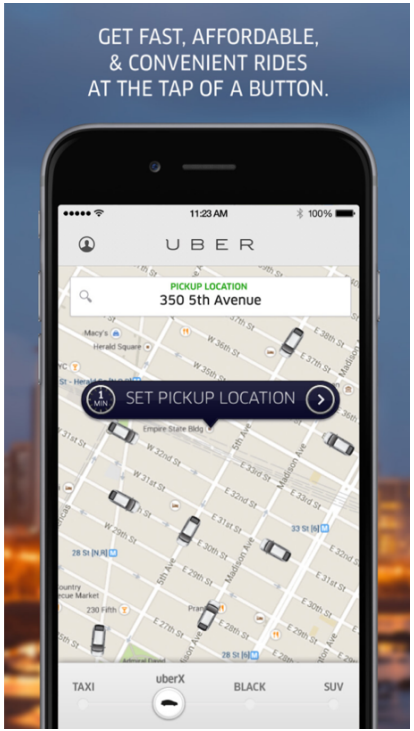


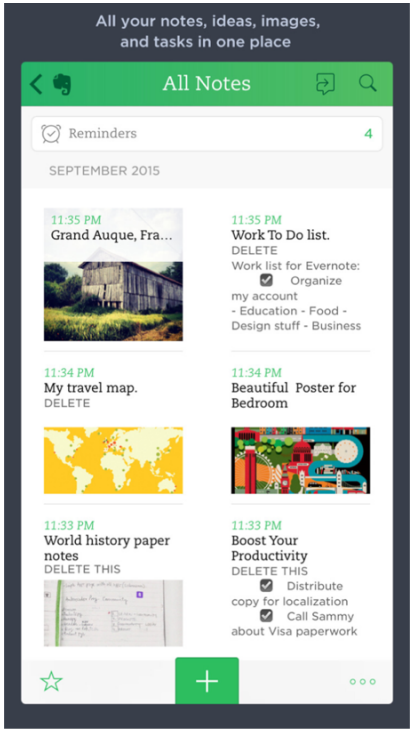
People buy products and services to get jobs done. Products come and go, but underlying jobs do not go away. Our goal is to solve the job well.

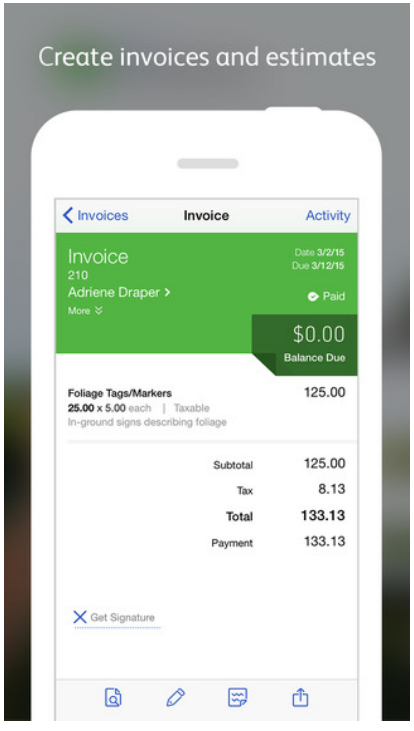
Focus on Jobs

Apps we love solve jobs that matter to us









Breaking Jobs Into Tasks



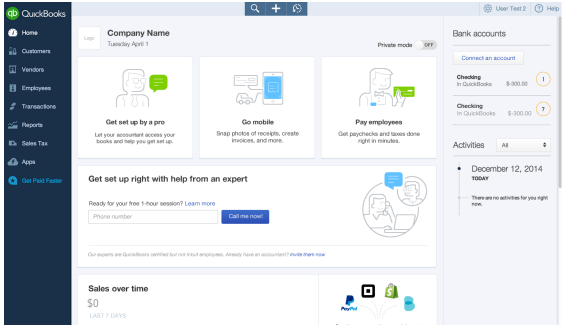
THE JOB

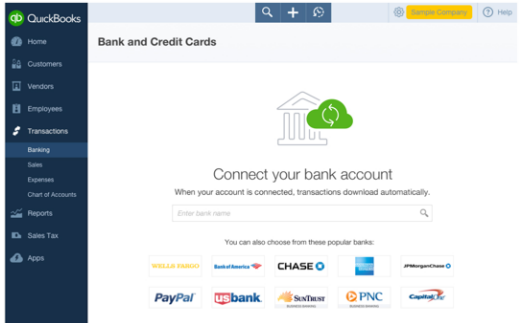
Pay employees

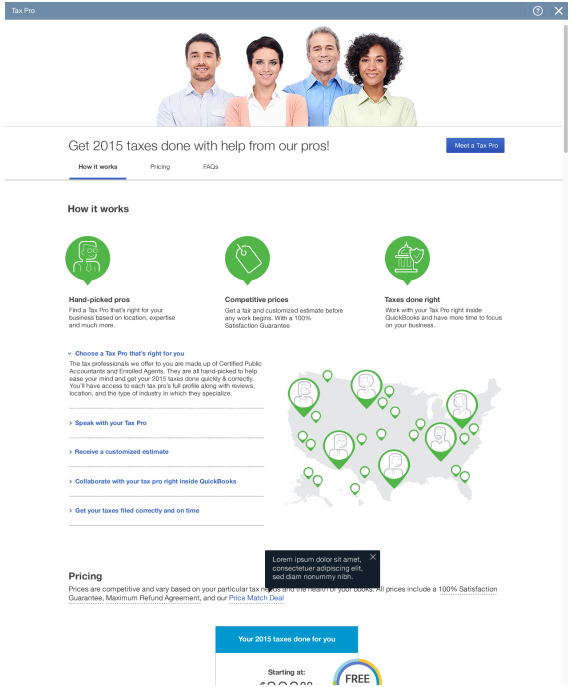
THE TASKS

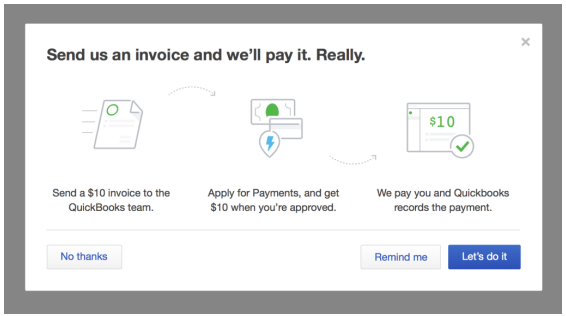
Add employees
Add pay types
Add garnishments/deductions
File new hire forms
Calculate paychecks
Cut & deliver paychecks
Account for cost of labor
Post labor law posters
Track employee hours
Track employee performance

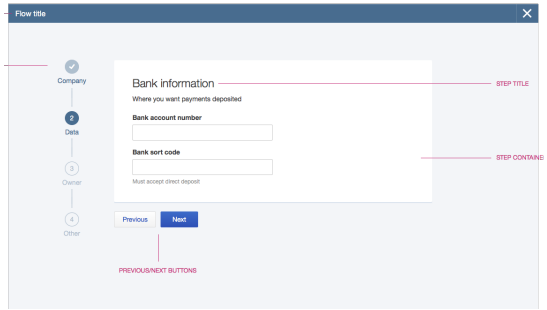
First Use Patterns



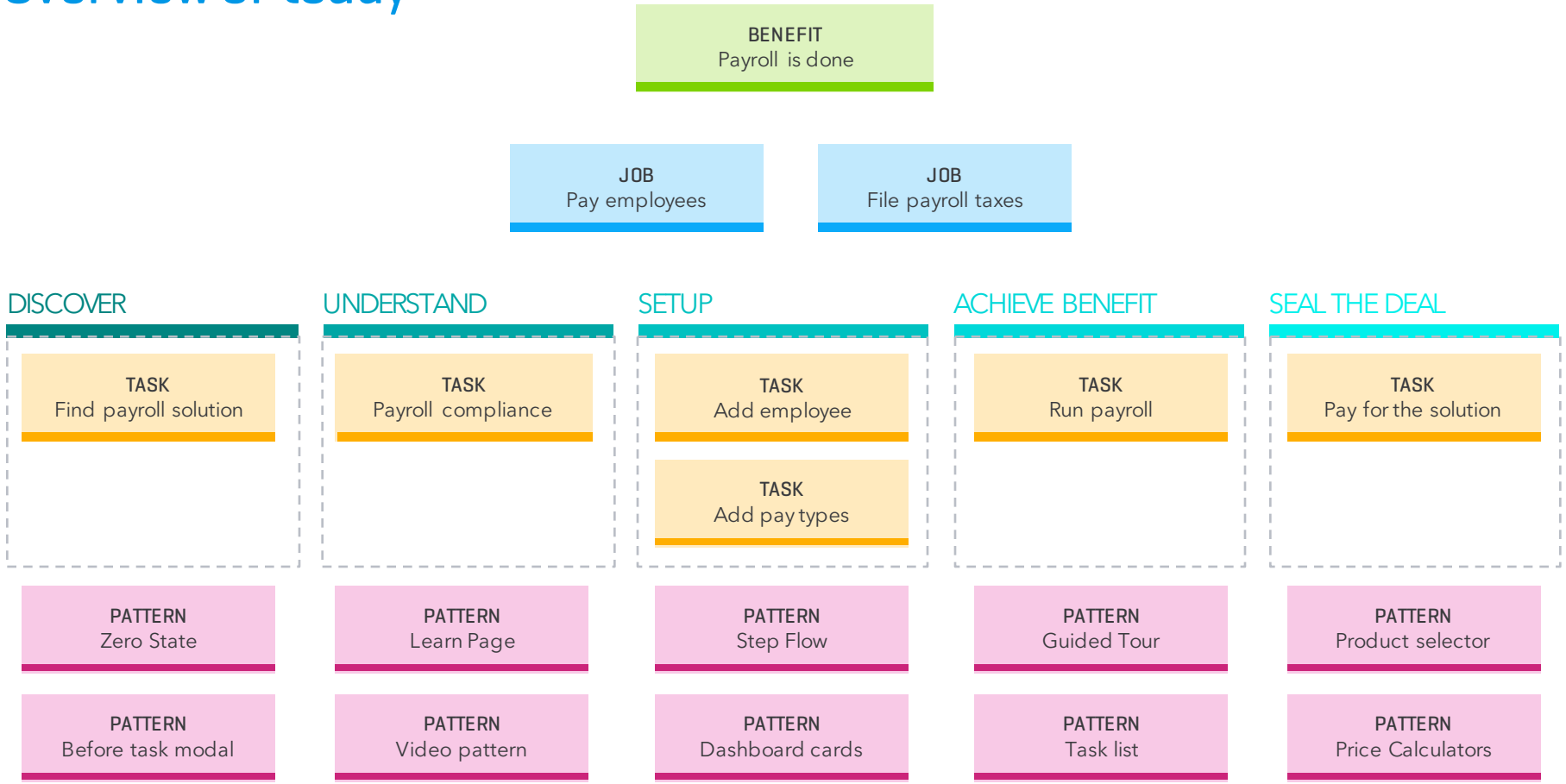








Overview of today





Exercise 1

Mapping the journey



Exercise 2

Measuring the Benefit



Exercise 3

Delivering Delight

What are all of the tasks involved in completing a job today?



Exercise 1

Mapping the journey

Supporting the customers journey from discovery to achieving the benefit.

First Use Journey

SEAL THE DEAL

Helping the user choose a plan based on what we know about them.

ACHIEVE BENEFIT

Ensuring the user feels the value of the benefit by experiencing it for the first time.

SETUP

Guiding the user through entering data, configuring settings, or customizing a feature.

UNDERSTAND

Helping the user understand what's at stake, why it's relevant, and what the benefits are.

DISCOVER

Exposing the user to a tailored, recommended solution based on what we know about them.

First Use Journey

DISCOVER

BEHAVIOR MECHANICS

_ Social Proof

_ Curiosity

_ Exclusivity

_Loss Aversion

USER DATA

_ Profile demographics

_ Usage data

_ Status

VISUALIZE THE VALUE

_ Sneak peek of features

UNDERSTAND

CONSIDER

_ What's at stake?

_ Design for the "aha!"

_ What's the unique value proposition?

_ How much will it cost?

SETUP

CONSIDER

_ Not asking for info you don't need

_ Teaching through the process of doing

_ Ask simple questions

_ Demonstrate progress

_ Establish trust

_ Eliminate steps

ACHIEVE BENEFIT

CONSIDER

_ Make it an own-able moment

_Celebrate success

_ Clarify next steps

_Encourage repeat use and habit forming

SEAL THE DEAL

CONSIDER

_ Will the solution benefit me?

_ Allowing the user to try before buying

_ Clear pricing communication

_ Price should feel better than the competition

First Use Journey

BENEFIT Arrive at destination

JOB Get a ride

DISCOVER	UNDERSTAND	SETUP	ACHIEVE BENEFIT	SEAL THE DEAL
TASKS	TASKS	TASKS	TASKS	TASKS
Hear about it from a friend	Learn about what it does	Download the app	Open the app	Money leaves bank
Search for it in app store	Who are the drivers?	Open the app	Enter destination	Rate the driver
	How much does a ride cost?	Create an account	Select type of ride	
	How long does it take?	Enable Geo-location	Wait for driver	
	Guarantees?	Add credit card	Get stuff loaded into car	
	How do I get a ride?		Take the ride	
			Get out of the car	

First Use Journey

BENEFIT Accounting is done

JOB Pay employees

DISCOVER	UNDERSTAND	SETUP	ACHIEVE BENEFIT	SEAL THE DEAL
TASKS	TASKS	TASKS	TASKS	TASKS
Get recommendation in QuickBooks	Learn about what it does	Add business info	Log in to time tracker	Understand the cost
	How does this compare to ADP?	Set up bank account	Review and approve hours	Calculate per employee fees
	How much does it cost?	Create employee profile	Enter employee time	Select service level
	How do taxes work?	Employee submits I-9, W-4	Submit payroll	Select add-on services
	Which plan is right for me?	Add employee pay info	Wait for bank transfer	Enter credit card info
	What about worker's comp? Labor laws?	File new hire paperwork	Get confirmation that they were paid	Receive bill
	What pay types are available? Deductions?			

Your turn!

YOUR CHALLENGE

Exercise 1: First Use Journey

10 mins

- Individually: Pick a core job from a product you know or work on. Map the job from end to end using the First Use Journey worksheet.
- Find a Buddy: Share your worksheets with each other for feedback. Point out any missing tasks.
- Everyone: 2-3 people share with the room


Let’s share!

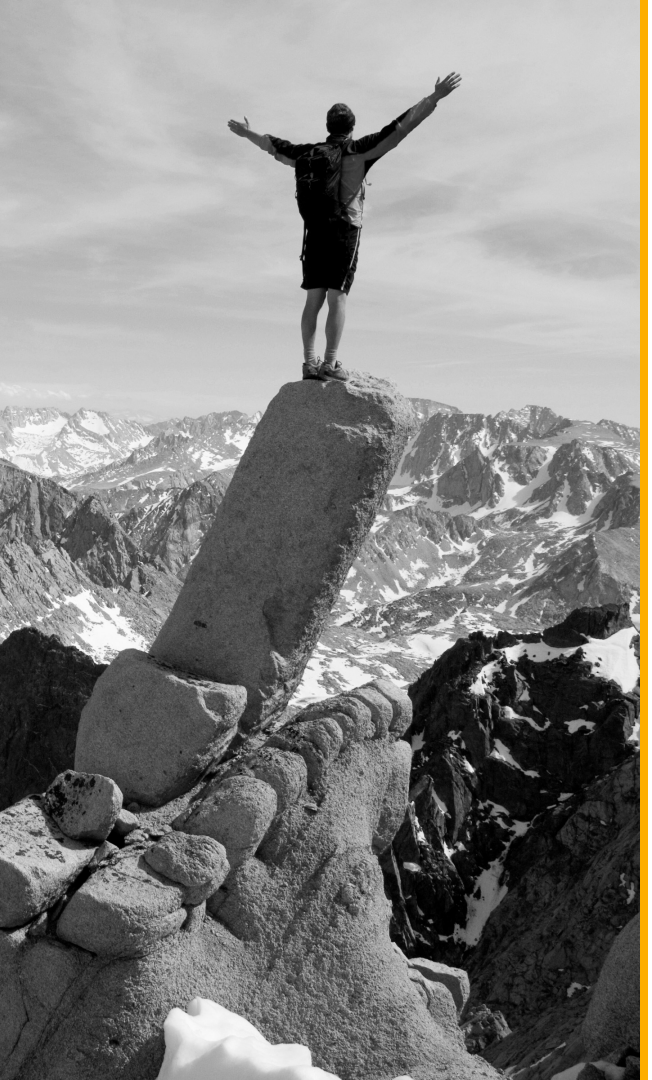
So far...

BENEFIT
Payroll is done

JOB
Pay employees

DISCOVER	UNDERSTAND	SETUP	ACHIEVE BENEFIT	SEAL THE DEAL
TASK Find payroll solution	TASK Payroll compliance	TASK Add employee	TASK Run payroll	TASK Pay for the solution
		TASK Add pay types		

How do we measure success?



Exercise 2

Measuring the benefit

Ensure the team is working on and measuring the most important tasks for the customer.

Measuring the benefit



Job: Online Shopping
Customer Benefit: Best selection, fast & affordable
Measure: % lowest priced products, delivery time



Job: Managing Notes
Customer Benefit: Always accessible
Measure: Uptime



Job: Driving
Customer Benefit: Lowest price & most convenient
Measure: % rides at lowest price, lowest wait time



Job: Pay Employees
Customer Benefit: Confidence & efficiency
Measure: % paycheck errors, time to run payroll

Measuring the payroll benefit

"That was easy."

"It took me half the time it normally takes!"



"The app connected directly to my time tracking tool."



"Everyone got paid on time."

"I know my paychecks are accurate."

"I know I got my payroll taxes right."

Measuring the benefit

From measuring business results (conversion)

To measuring customer results (efficiency & confidence)

TASK

Define the best way to measure the benefit.

ACTUAL

Time to complete & time spent waiting
How are we performing today?

CYCLE

PAIN

Degree of pain

TARGET

What is the mid-term and long term goal?

Measuring Benefit

JOB Get a ride

STAGE Setup

TASK	ACTUAL	CYCLE	TARGET	PAIN
LIST THE SMALL TASKS THAT LADDER UP TO THE OVERALL JOB	TIME TO COMPLETE	TIME SPENT WAITNG	GOAL TIME	LOW, MED, OR HIGH PAIN
Login/create account	60 sec	0 sec	0 sec	L M H
Enable geo-location	10 sec	0 sec	0 sec	L M H
Add credit card info	2 min	3 min	1 min	L M H
				L M H
				L M H

Measuring Benefit

JOB Pay employees

STAGE Setup

TASK	ACTUAL	CYCLE	TARGET	PAIN
LIST THE SMALL TASKS THAT LADDER UP TO THE OVERALL JOB	TIME TO COMPLETE	TIME SPENT WAITNG	GOAL TIME	LOW, MED, OR HIGH PAIN
Employer adds business info	30 sec	0 sec	30 sec	**L** M H
Employer sets up bank account	30 sec	3 min	30 sec	L **M** H
Employer creates employee profile	2 min	0 sec	1 min	**L** M H
Employee submits I-9, W-4 paperwork	0 sec	1-5 days	1 min	L M **H**
Employer adds employee pay info	1 min	0 sec	0 sec	**L** M H

Your turn!

YOUR CHALLENGE

Exercise 2: Measuring the benefit

10 mins

- Individually: Choose one stage from the first use journey and list out the tasks. Then list out how much time it currently takes a user to complete the task, how much time the user waits, and how painful the task is.
- Find a Buddy: Share your lists of tasks and relative pain
- Everyone: 2-3 people share their framework with the room


Let’s share!

So far...

BENEFIT
Payroll is done

JOB
Pay employees

DISCOVER	UNDERSTAND	SETUP	ACHIEVE BENEFIT	SEAL THE DEAL
TASK Find payroll solution	**TASK** Payroll compliance	**TASK** Add employee	**TASK** Run payroll	**TASK** Pay for the solution
		TASK Add pay types		
PATTERN Zero State	**PATTERN** Learn Page	**PATTERN** Step Flow	**PATTERN** Guided Tour	**PATTERN** Product selector
PATTERN Before task modal	**PATTERN** Video pattern	**PATTERN** Dashboard cards	**PATTERN** Task list	**PATTERN** Price Calculators

How do we create a consistent experience across multiple jobs and tasks?



Exercise 3

Delivering delight

Solve the customer pain by leveraging patterns for awesome first use experiences.

First Use Patterns

DISCOVER

_ Zero state page
_ Guidance tip
_ In-page tip
_ Dashboard card
_ Before task modal
_ After task modal
_ What's new
_ Task list
_ Email

UNDERSTAND

_ Learn page
_ Help topics
_ Video pattern

SETUP

_ Step-flow
_ Zero state page
_ Dashboard cards
_ Task list

ACHIEVE BENEFIT

_ Guided tour
_ Task list
_ Confirmation
_ Video pattern
_ After task modal

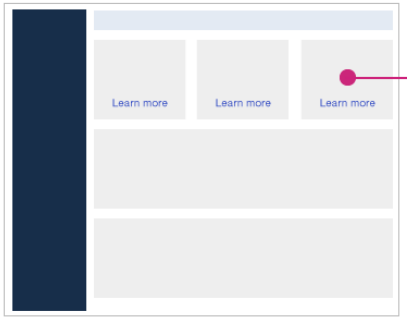
SEAL THE DEAL

_ Help-me-choose tool
_ Plan comparison
_ Competitor comparison

First Use Patterns

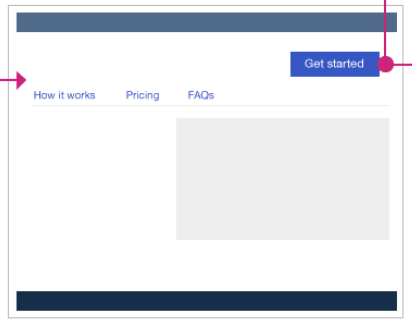
In many cases, the product selector page is not necessary

DASHBOARD



Dashboard cards spark the users interest, using illustration or data visualizations that show how the offering works.

LEARN PAGE



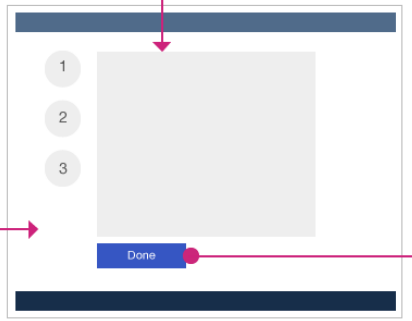
The Learn Page gives the user all of the information about the product that he/she would need to make a decision.

PRODUCT SELECTOR



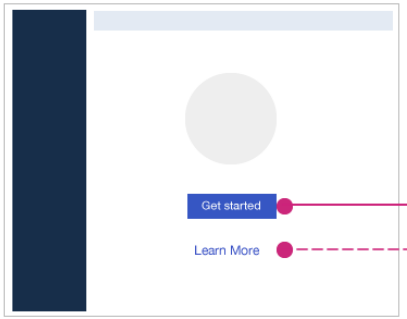
The Product Selector page allows the user to choose between mutliple product offerings.

SETUP FLOW



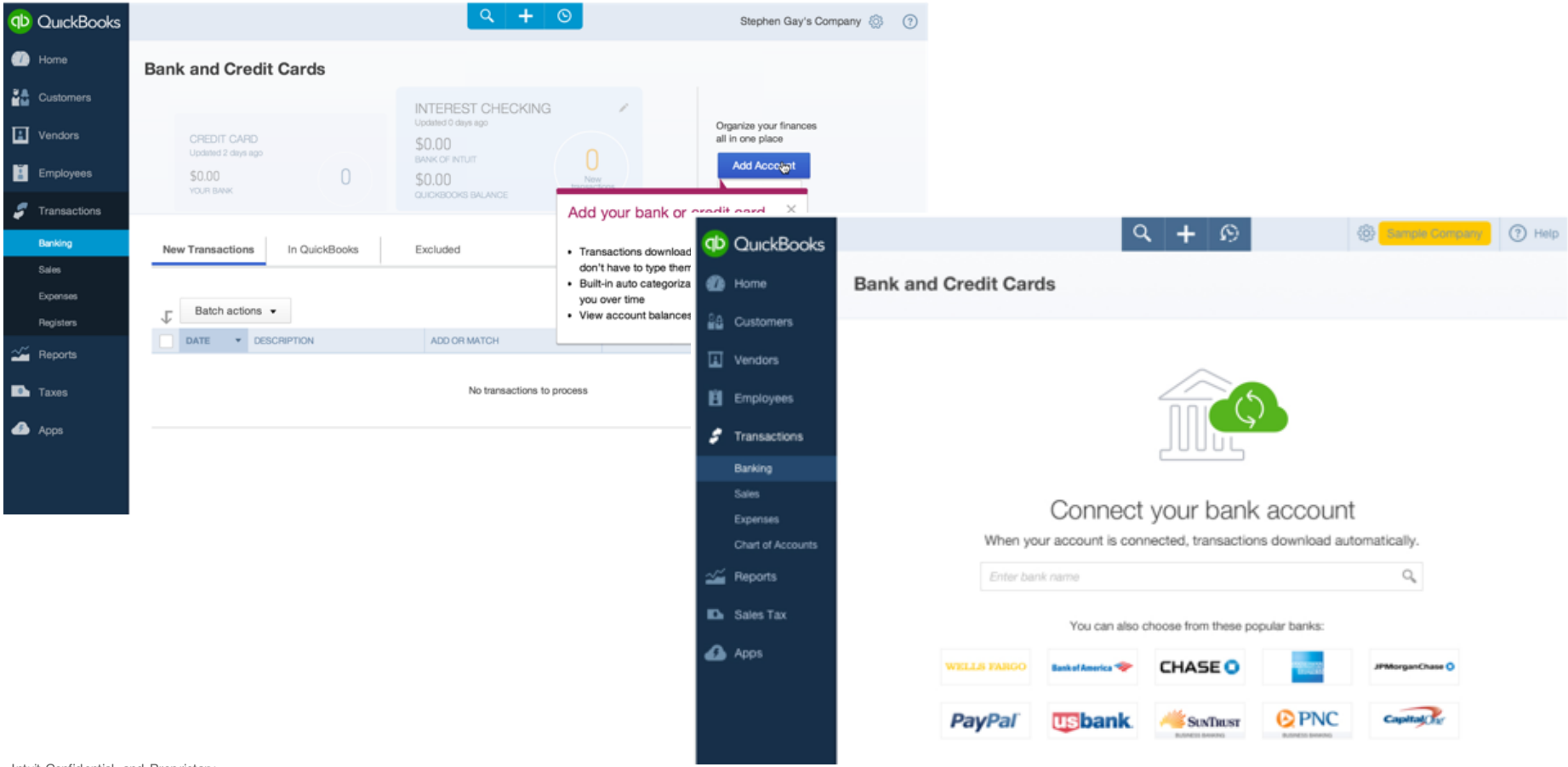
The Step Flow guides the user through setup and helps them understand how the product will work as they set it up.

ZERO STATE PAGE

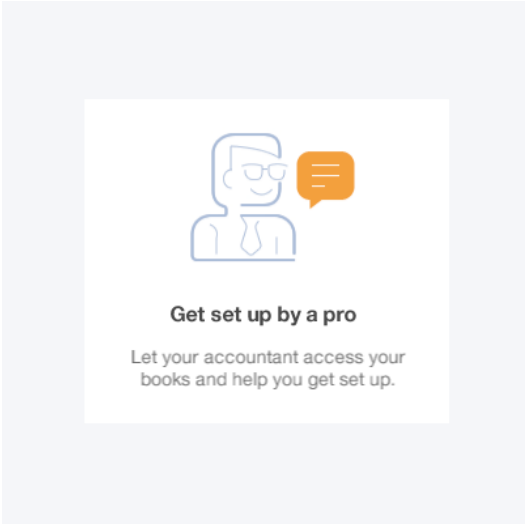


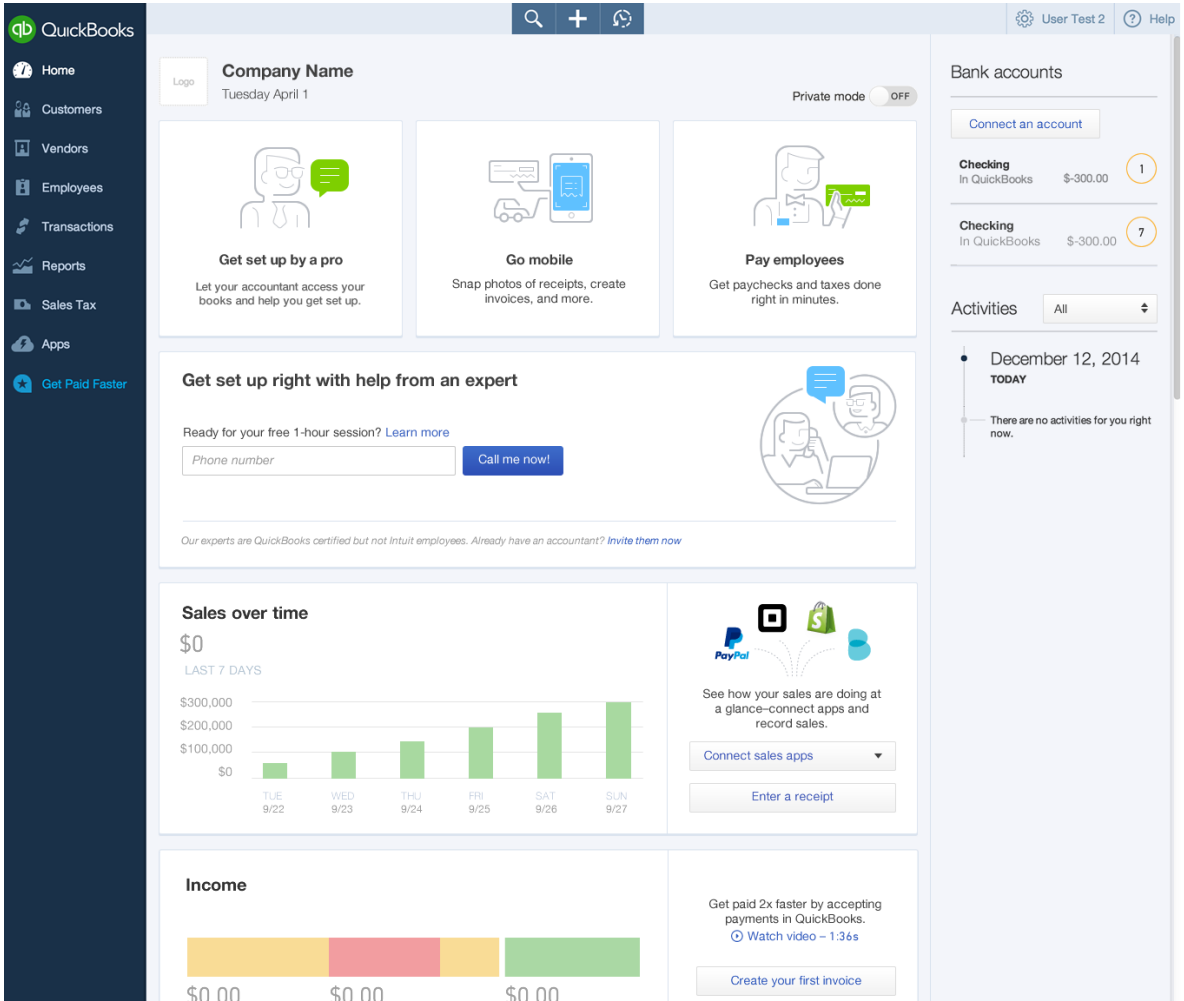
Empty left nav pages teach the user about what will appear in that section and guide the user toward the first step in getting setup.

Zero State

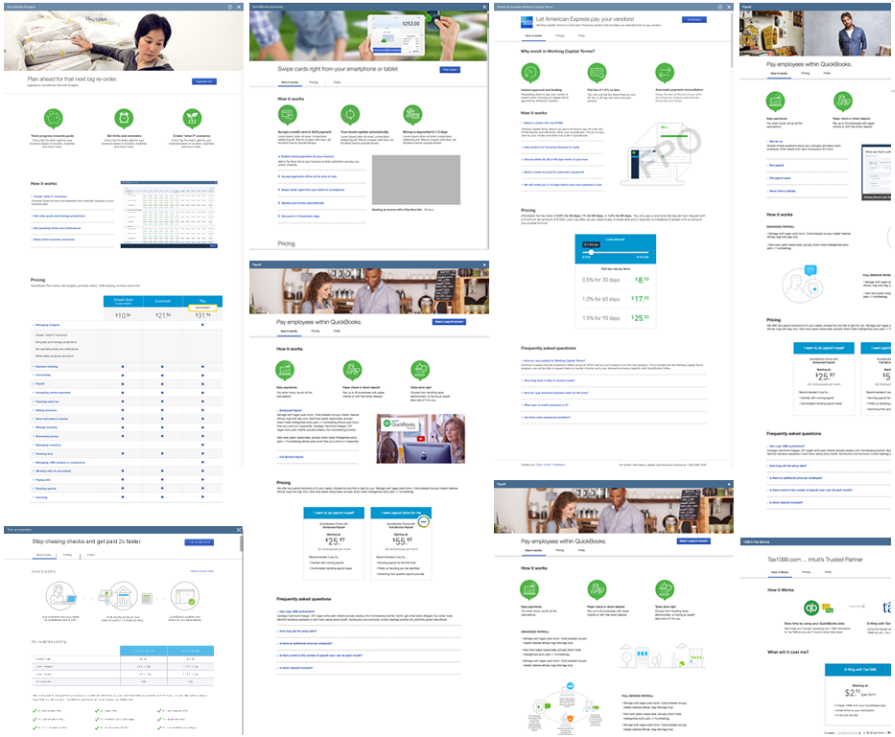

QuickBooks
Home
Customers
Vendors
Employees
Transactions
Banking
Sales
Expenses
Registers
Reports
Taxes
Apps
Stephen Gay's Company
Bank and Credit Cards
INTEREST CHECKING
Updated 0 days ago
$0.00
BANK OF INTUIT
$0.00
QUICKBOOKS BALANCE
CREDIT CARD
Updated 2 days ago
$0.00
YOUR BANK
0
Organize your finances all in one place
Add Account
Add your bank or credit card
Transactions download don't have to type them
Built-in auto categoriza you over time
View account balances
New Transactions
In QuickBooks
Excluded
Batch actions
DATE
DESCRIPTION
ADD OR MATCH
No transactions to process
Sample Company
Help
Chart of Accounts
Sales Tax
Connect your bank account
When your account is connected, transactions download automatically.
Enter bank name
You can also choose from these popular banks:
WELLS FARGO
Bank of America
CHASE
JPMorganChase
PayPal
USbank
SunTrust
PNC
Capital One

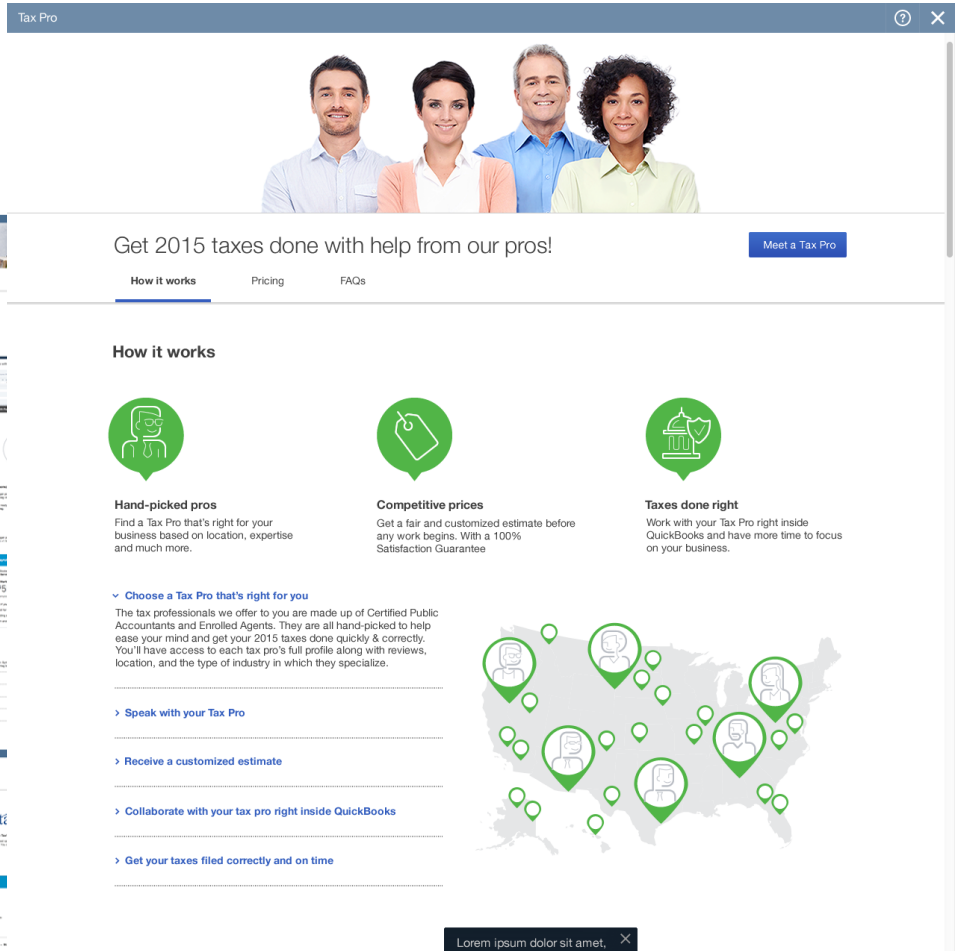
Dashboard Cards



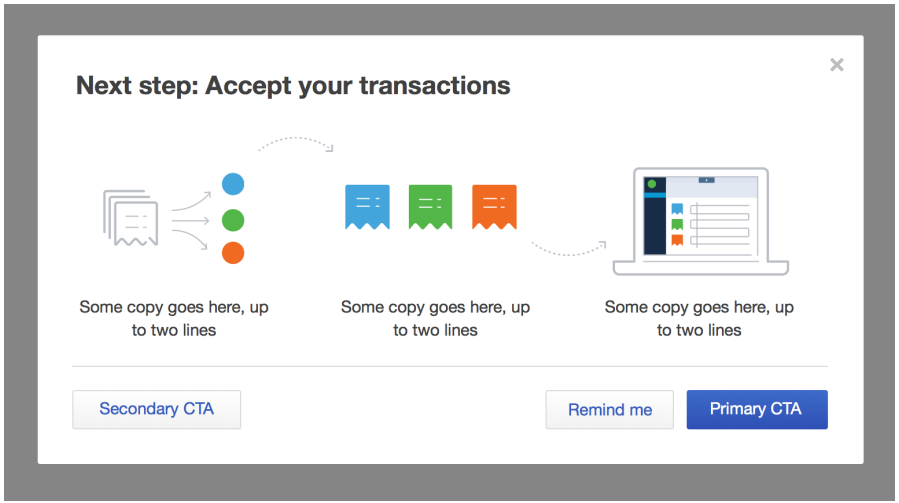


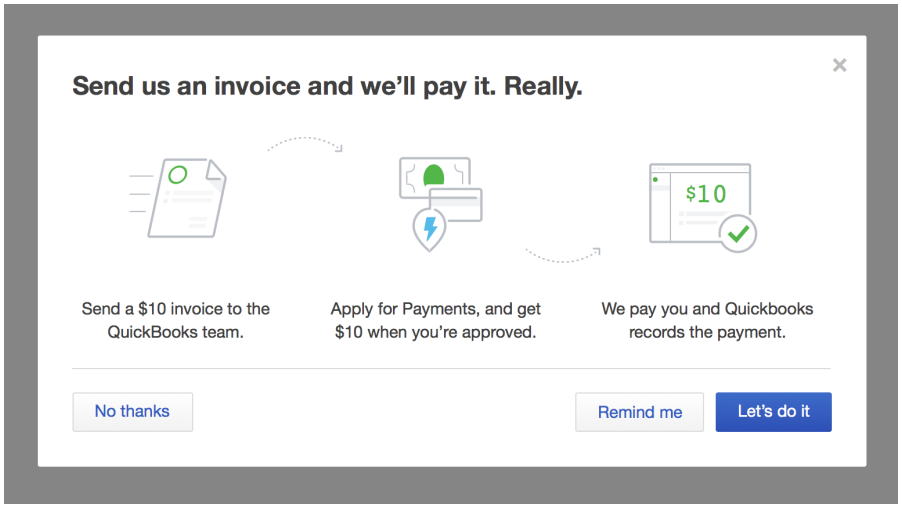
Learn Page



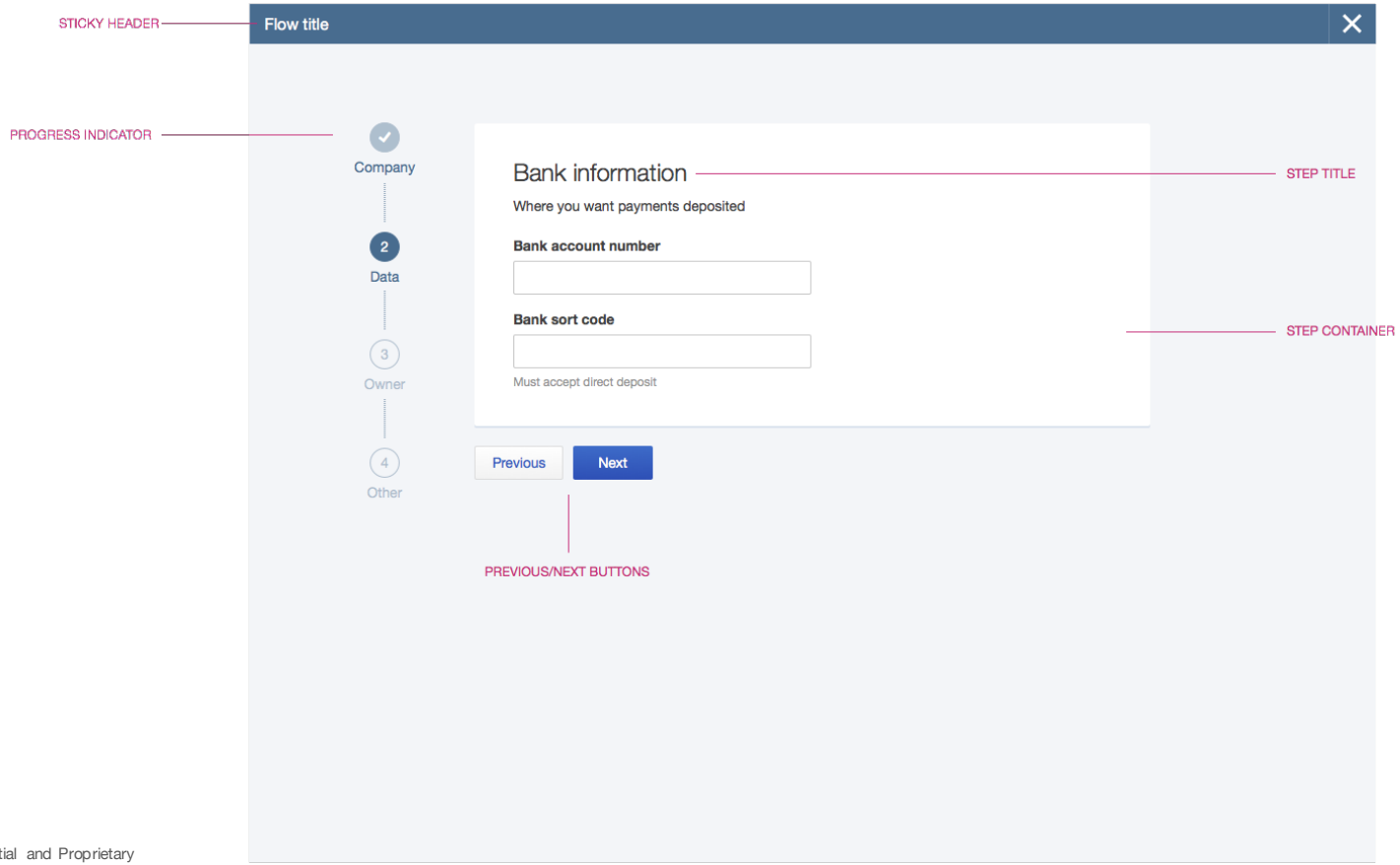

Tax Pro
Get 2015 taxes done with help from our pros!
Meet a Tax Pro
How it works
Pricing
FAQs
How it works
Hand-picked pros
Find a Tax Pro that's right for your business based on location, expertise and much more.
Competitive prices
Get a fair and customized estimate before any work begins. With a 100% Satisfaction Guarantee
Taxes done right
Work with your Tax Pro right inside QuickBooks and have more time to focus on your business.
Choose a Tax Pro that's right for you
The tax professionals we offer to you are made up of Certified Public Accountants and Enrolled Agents. They are all hand-picked to help ease your mind and get your 2015 taxes done quickly & correctly. You'll have access to each tax pro's full profile along with reviews, location, and the type of industry in which they specialize.
Speak with your Tax Pro
Receive a customized estimate
Collaborate with your tax pro right inside QuickBooks
Get your taxes filed correctly and on time
Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh.
Pricing
Prices are competitive and vary based on your particular tax needs and the health of your books. All prices include a 100% Satisfaction Guarantee, Maximum Refund Agreement, and our Price Match Deal

Before Task Modal





Step Flow

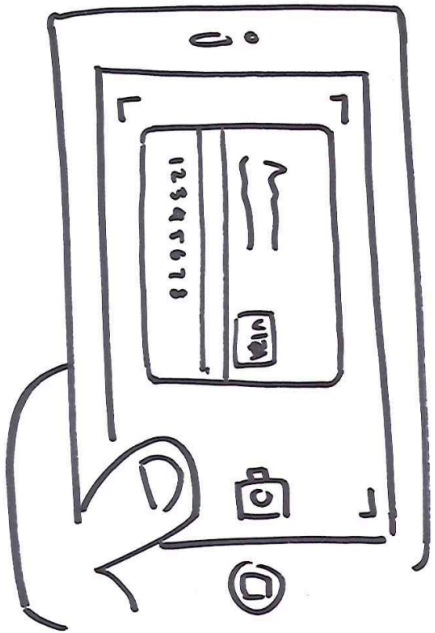

STICKY HEADER
Flow title
PROGRESS INDICATOR
Company
2
Data
3
Owner
4
Other
Bank information
STEP TITLE
Where you want payments deposited
Bank account number
Bank sort code
STEP CONTAINER
Must accept direct deposit
Previous
Next
PREVIOUS/NEXT BUTTONS

Pattern Sketches

STAGE Setup

TASK Add credit card

DISCOVER



NOTES

DESCRIBE THE PATTERN YOU CHOSE AND WHY

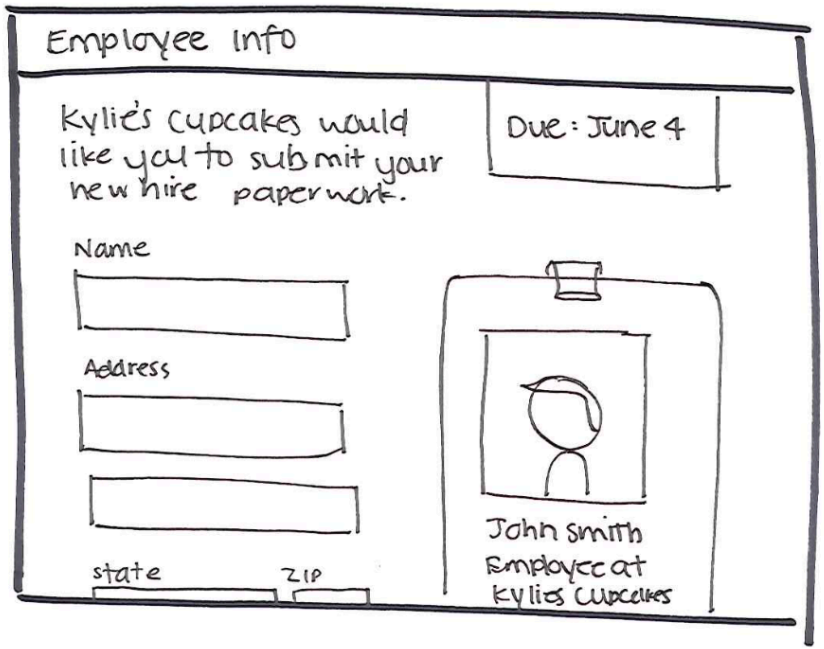
Instead of having a user type in their credit card info on a tiny phone keyboard, we could allow them to quickly snap a photo and have their credit card on file. This would eliminate the time it takes to manually key the numbers in.

Pattern Sketches

STAGE Setup

TASK Employee add I-9, W-4

DISCOVER



NOTES

DESCRIBE THE PATTERN YOU CHOSE AND WHY

By delegating the responsibility of uploading new hire forms to the employee, we can save the time that it takes for the employee and the employer to communicate, fix mistakes, etc. The employee can access a secure online portal to fill out all of their own setup information.

Your turn!

YOUR CHALLENGE

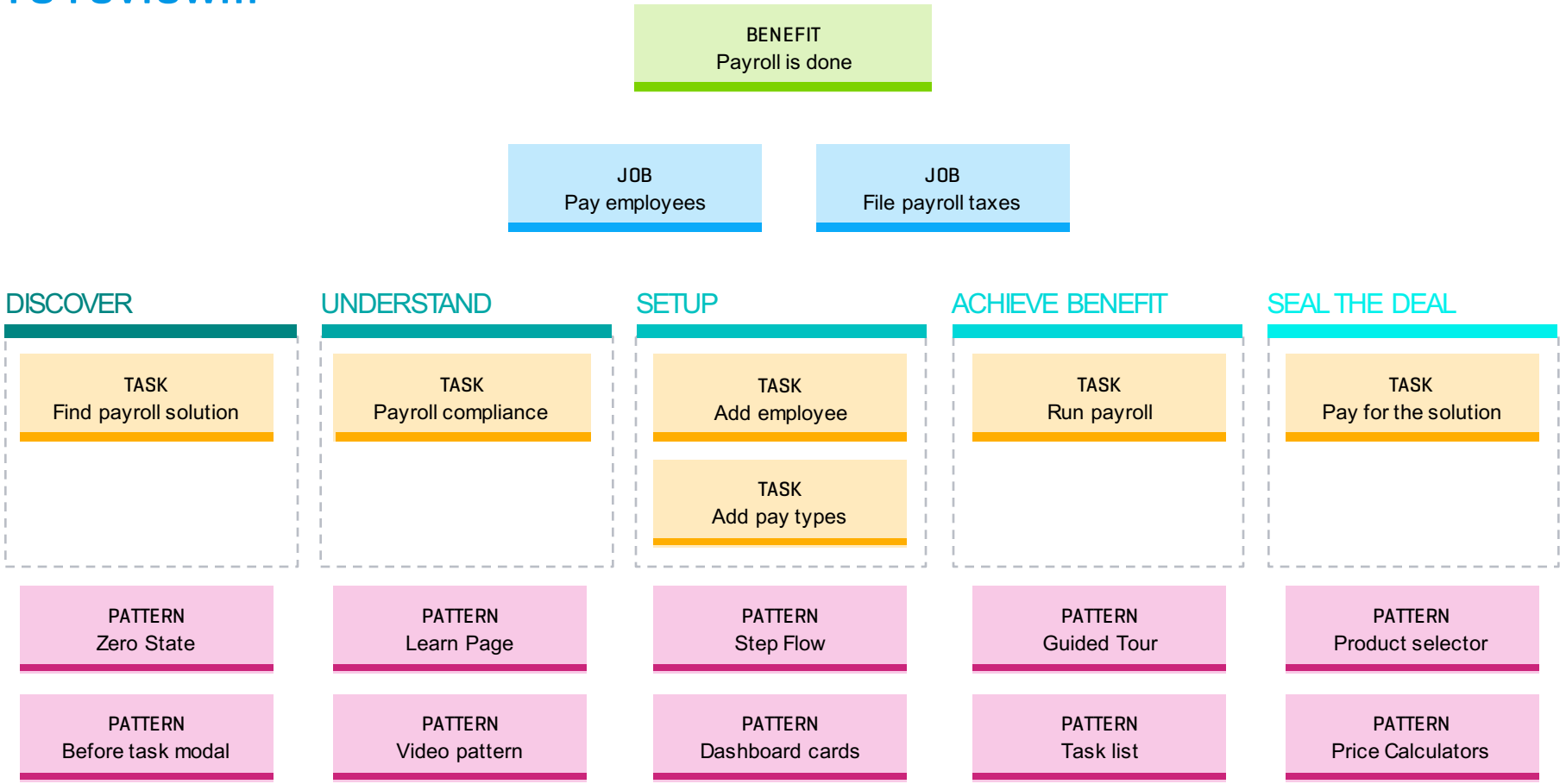
Exercise 3: Delivering delight

10 mins

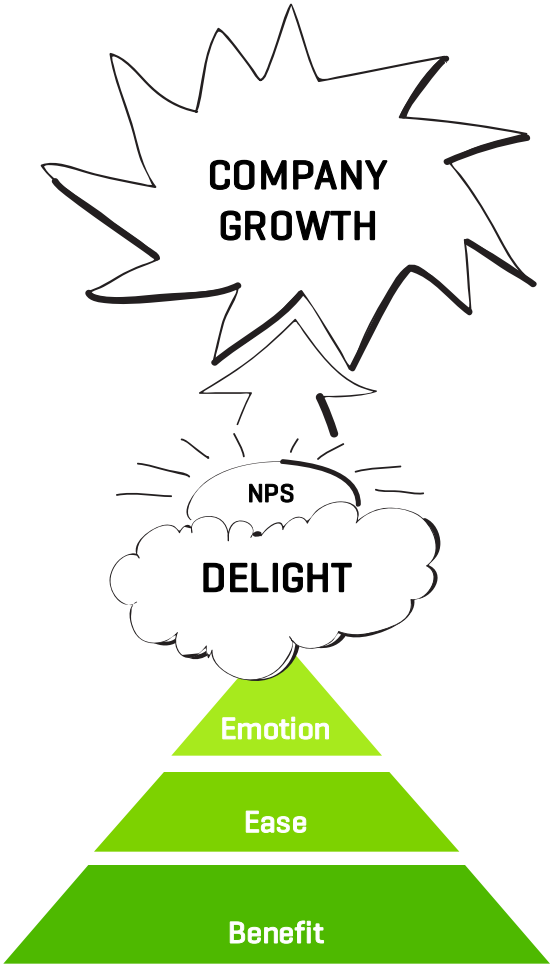
- Individually: Choose one of the most painful tasks from your Measuring the Benefit worksheet. Then, using one of the First Use Patterns, sketch out a solution, screen, or experience that could help make the experience more delightful for your customer.
- Find a Buddy: Share your sketch with a partner
- Everyone: 2-3 people share their sketches with the room


Let’s share!

To review...


BENEFIT
Payroll is done
JOB
Pay employees
JOB
File payroll taxes
DISCOVER
UNDERSTAND
SETUP
ACHIEVE BENEFIT
SEAL THE DEAL
TASK
Find payroll solution
TASK
Payroll compliance
TASK
Add employee
TASK
Add pay types
TASK
Run payroll
TASK
Pay for the solution
PATTERN
Zero State
PATTERN
Learn Page
PATTERN
Step Flow
PATTERN
Guided Tour
PATTERN
Product selector
PATTERN
Before task modal
PATTERN
Video pattern
PATTERN
Dashboard cards
PATTERN
Task list
PATTERN
Price Calculators

Wrap Up



Resources & Tools

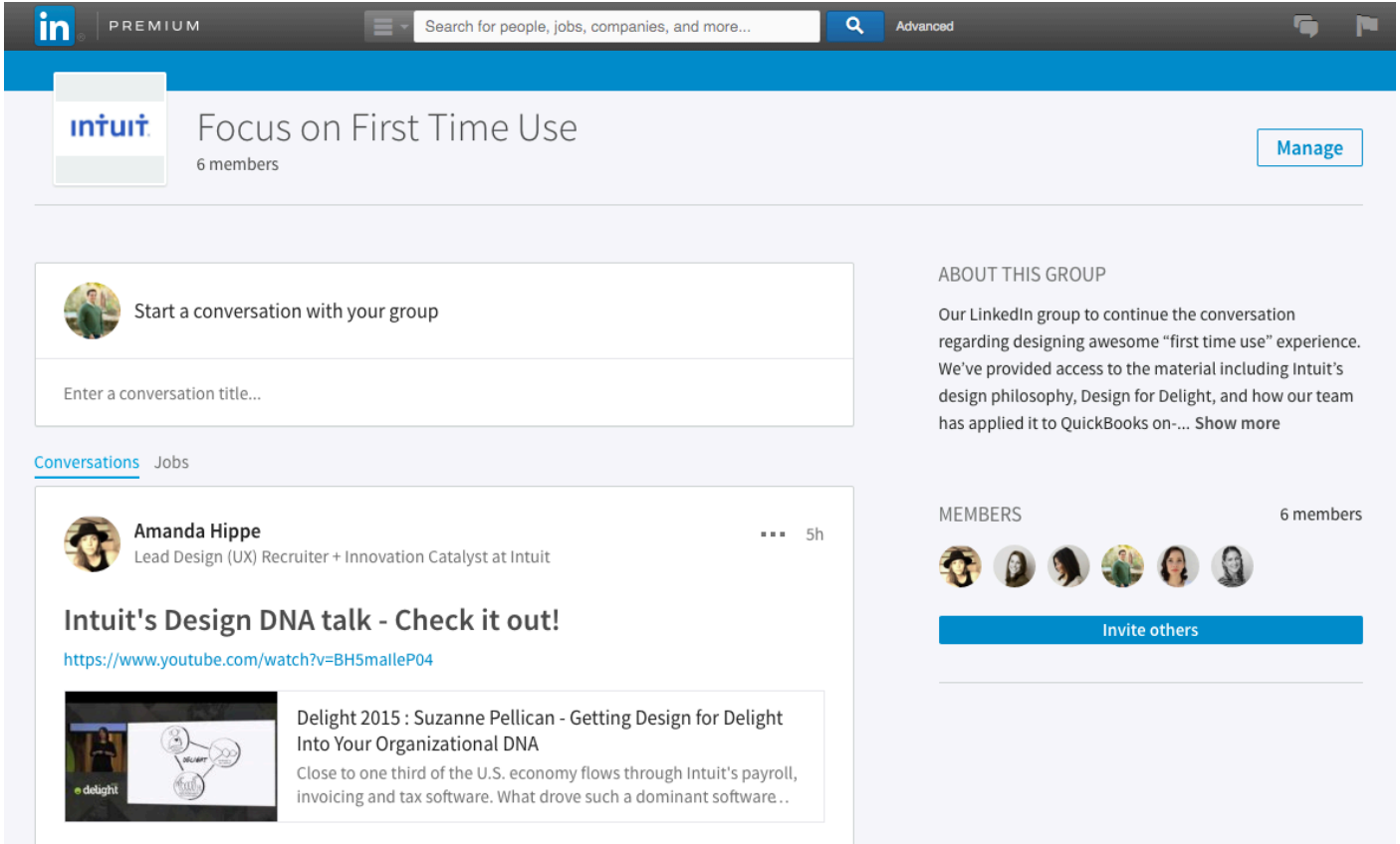
Resources shared on…

- #focusonfirstuse #sfdw
- LinkedIn Group

Methods

- First Use Journey
- Measuring the Benefit
- First Use Patterns

First Use LinkedIn Group





Worksheets

First Use Journey

BENEFIT

JOB

DISCOVER	UNDERSTAND	SETUP	ACHIEVE BENEFIT	SEAL THE DEAL
TASKS	TASKS	TASKS	TASKS	TASKS

First Use Journey

BENEFIT

JOB

DISCOVER	UNDERSTAND	SETUP	ACHIEVE BENEFIT	SEAL THE DEAL
TASKS	TASKS	TASKS	TASKS	TASKS

First Use Journey

BENEFIT

JOB

DISCOVER	UNDERSTAND	SETUP	ACHIEVE BENEFIT	SEAL THE DEAL
TASKS	TASKS	TASKS	TASKS	TASKS

Measuring Benefit

JOB

STAGE

TASK	ACTUAL	CYCLE	TARGET	PAIN
LIST THE SMALL TASKS THAT LADDER UP TO THE OVERALL JOB	TIME TO COMPLETE	TIME SPENT WAITNG	GOAL TIME	LOW, MED, OR HIGH PAIN
				L M H
				L M H
				L M H
				L M H
				L M H

Measuring Benefit

JOB

STAGE

TASK	ACTUAL	CYCLE	TARGET	PAIN
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				L M H
				L M H

Measuring Benefit

JOB

STAGE

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				L M H
				L M H
				L M H
				L M H

Pattern Sketches

STAGE

TASK

DISCOVER

NOTES

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Pattern Sketches

STAGE

TASK

DISCOVER

NOTES

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STAGE

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