# Horizon Customer Migration/Launch UX Research Plans

## Beta Migration/Launch (end of Q4)

### Objective and Goals: Customer Migration Beta Overview

### Generative Research:

### Screener: Existing FreshApp users (5-10)

Requirements:

- Canada or United States
- Creative professionals
- Non-mobile users
- Non-XML API users

Variables:

- Paying and free users
- Mostly people who use features that are in SMUX, a few people who use features that are not in SMUX
    - I.e. Users who don't use time tracking vs users who do
    - 8 users who use features that are in SMUX, 2 users who use FreshApp specific features
- *Users who use the same features many times repeatedly and users who use many different features with less frequency*
    - *I.e. Users who mainly use invoices and send 10-12 invoices/month vs users who use invoices, expenses and reports etc...*
- A mix of tenure (how long have they been using FreshBooks)
    - 2 users with 1-2 yrs of usage, 2 users with 3-5 yrs of usage, 3 users with 6-8 yrs of usage, 3 users with 9-10 yrs of usage
- *A mix of early adopters and users that are less inclined to try new things*
    - *How might we find these people? People who click on new feature CTAs?*
    - *This is likely an outcome of the research rather than an input*

### *Proposal*

| 10 total participants | | | | |
|---|---|---|---|---|
| 8 who use SMUX-only features | | | 2 who use non-SMUX features (time-tracking, estimates, reports, or projects) | |
| 4 who have used FB for 1-2 years | 3 who have used FB for 3-5 years | 1 at 6-8 years | 1 at 1-2 years | 1 at 3-5 years |
| 5 paying customers | | 3 free users | 1 paying | 1 free |

## Things we want to find out from beta

### FreshApp User Journey

| Green cells = goals |
|---|

| Discover | Consider | Try | Commit | Leave |
|---|---|---|---|---|
| **Notify users about the new product in an effective and pleasant way** | **Identify the determining factors that will affect users decision about switching** | **Find out users' emotions and thoughts about SMUX** | **Determine the key elements that would make users stay in SMUX** | **Determine the key elements that would make users leave SMUX** |
| *We will contact qualified users manually* | What do users NEED to know/see/do before switching? (DS/interview) | What questions do users have at this point? Do they need help? (DS/interview) | Can users articulate the key differences between FreshApp and SMUX? (DS/interview) | What made them leave SMUX? Are they going back to FreshApp? Other software? (DS/interview) |
| What's a great product change experience? What's a terrible one? (DS/survey/interview) | What are users' concerns? (DS/interview) | Does SMUX still resemble the FreshBooks brand to users? (DS/interview/survey) | Users' perspective of the pros and cons of SMUX and FreshApp (DS/interview) | Would they recommend SMUX to others even though it might not be a right fit for them? Why or why not? (Survey/DS/interview) |

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| | What excites and motivates our users about switching? (DS/interview) | Do they trust SMUX? (DS/interview/survey) | Would they recommend SMUX to their friends? Any particular professions? Why or why not? (Survey/DS/interview) | How long did users stay with SMUX before they leave? (quant) |
| | What's the level of interest to switch? <br><br> Do we need to provide any incentives? (Survey/interview) | Would they keep using SMUX? Why or why not? (DS/interview/quant.) | What did it take them to commit? How long did it take? Specific details? (DS/interview) | |
| | When would our users be most inclined to make a switch like this? Why? <br><br> (DS/survey/interview) | ~~What percentage of users opted in to SMUX? (Answered in Commit column.)~~ | Which features have the highest usage rate per month? <br><br> What are the usage frequencies per month of these features? (quant) | |
| | What are some of the reasons that would stop our users from making the switch? (DS/interview) | How many days/weeks did it take for users to move from **Discover** to **Commit?** (Quant.) | What are the percentages and frequencies of users who login per day/week/month? (quant) | |
| | Do the users' network have any impact on the decision making? <br><br> Are they concern about their network (clients and staff) might feel about the switch? <br><br> Is their network holding them back from switching? <br><br> (DS/interview) | What are the percentages and frequencies of users who login per day/week/month? (Quant) | | |
| | What do users expect/hope has changed? | Where do users go in SMUX? (DS/fullstory/quant) | | |
| | | What do users do in SMUX? (DS/fullstory/quant) | | |

# Research Methods

- Diary Studies
    - Will require more effort from the users end and the quality of insight will vary from users
- Cognitive Walkthrough
    - Observe and record users going through the process then review the video together with them and have them talk through each pain point or decision making
- Surveys
    - Call/send contextual surveys during each stage periodically

# Case Studies

- Basecamp
- Google Classic Gmail vs Inbox
- QuickBooks
- Wave
- Evernote

# How have others

- How have others communicate major product changes to users? When, who and how often?
- What did others communicate in regards to major product changes to satisfy users needs?
- Did others let users "try out" the new product before switch? Did others offer some type of demo or trial phase for users?
- How did others approach users who don't want to switch?

- How have others captured feedback?

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## Beta Timeline

| Nov 2 - Nov 13 | |
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| **Invitation Email** | Invite beta qualified users to participate in research study including incentive for the phone interview<br><br>[Jeff] Update email to have a manual booking process - remove you can book me link<br><br>[Jeff] Send existing email to 10 Toronto beta participants |
| **Phone Interview** | Schedule a 30 min interview session with the phone interview script<br><br>[Emily] Preparing and revising existing phone interview script - add notes about expectation setting<br><br>[Jeff] Finalize incentives (One yr free subscription/$300 Amazon gift card) |
| **Expectation Setting** | [Justin] Giving participants details on the impact of having their data appear on SMUX and how much involvement will be required for the diary study (I.e. can't use both FreshApp and SMUX at the same time)<br><br>[Jeff] Include client issues in NDA if possible<br><ul><li>Have participants tell their clients that they are trying out a new software without disclosing it's from FreshBooks</li><ul><li>Confirmed with Levi that we can use existing NDA</li></ul></ul>Send expectation package which will also include diary studies details<br><br>Schedule a 15 - 30 min call to confirm all details and answer any questions |
| **Nov 16 - Dec** | |
| **Signing-In SMUX** | Write interview script for this step/SMUX walkthrough<br><br>Schedule a 60 min session (at their locations if possible) to observe participants using SMUX with their own data in the account<br><br>If possible, go to the participant's location, otherwise bring them in-house |
| **Diary Studies Begins** | [Emily] Write DS questions<br><br>[Emily] Test run with support members (1-2)<br><br>[Emily] Start diary studies and review feedback after each entry. Schedule check-ins as needed. (more details in diary studies section) |
| **Diary Studies Ends** | Schedule a final follow-up session with participants to discuss their overall experience |
| **Synthesis** | Analyze the feedback |

## Interview Scripts have moved here