toast
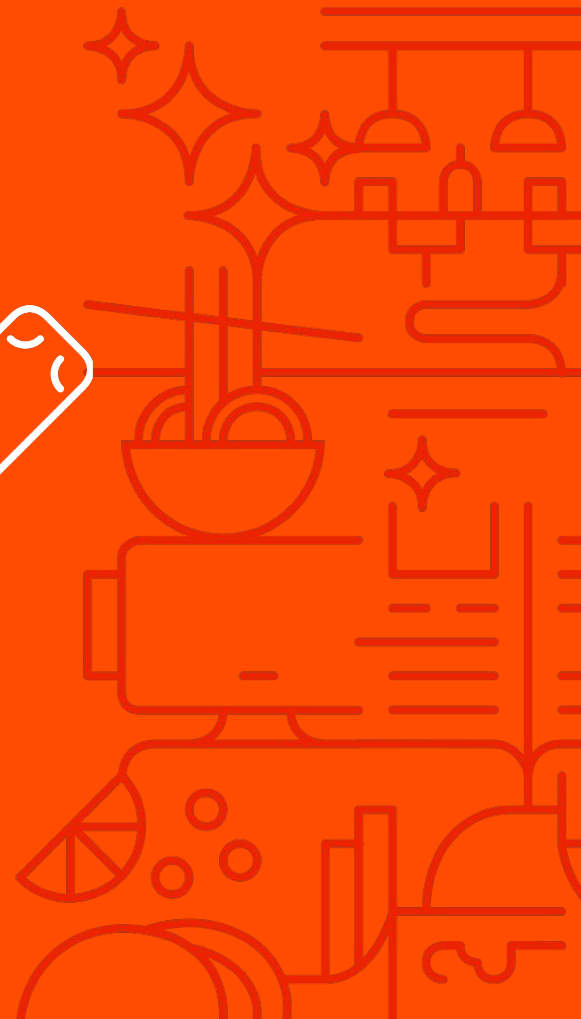
Search & Navigation Beta Insights

Insights & Recommendations
Q2 2024

Background

The new Search & Navigation experience is live to 5.5k customers. The new experience solves three central issues:

1. **Most customers only do 5 or fewer things regularly in TW and didn't have an easy way to get there.**
   ⭐ To fix this, we now let users quickly pin their favorite quick actions.
2. **Learning Toast Web required too much work and users relied on memorized click patterns.**
   ⭐ To fix this, we grouped functionality into familiar categories like POS, Operations, Team, etc
3. **The left nav made it difficult to find toast functionality. Customers had no hints about what was behind a left nav option without "committing" to click it. Many times they were brought to an upsell/toast shop experience, which added to the pain.**
   ⭐ To fix this, we built a menu experience that lets customers see a wide range of options by hovering on a category, which increases their confidence that they're picking the right option.

Get a tour of our new experience [here](#) 🎥

Executive Summary

Task success on the new experience is high. 20 second bounce rate has dropped 78% in the new experience, a sign that it's easier for customers to find their desired page.

Customers like the customizable quick actions. Pinning a quick action is an "Aha" moment of delight. But, 81% of customers have not pinned a quick action. We validated that a short explainer video educates customers and are including that in future rollouts.

Removing the link farm is the biggest driver of pain. Customers loved the link farm because of simplicity of use and visibility to "all" options in Toast. ~~We will add the link farm back for the new experience as a temporary measure,~~ and have started an experimentation cycle to solve these needs. Link farm users are a small subset of our customers. We will iterate to make an experience that is more intuitive for all our customers.

We are improving the change management experience. Based on learnings from POS 3.0, we are improving the transition experience to the new experience by giving users control over when they opt in and allowing them to toggle the new experience on and off during the trial period.

Pinning quick actions is a delighting moment but there's an educational gap

⭐ **Users love the pinned quick actions experience**

1. Customize for convenience

2. Each restaurant user can personalize to their usage

3. Quicker access to important things

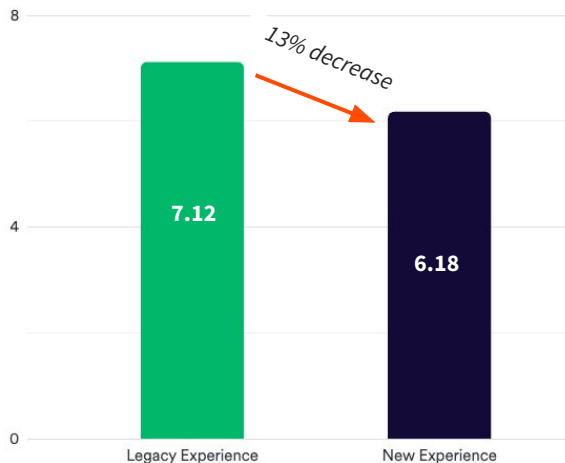👨‍🎓 **But only 7.4% of users on the new experience have pinned a quick action**

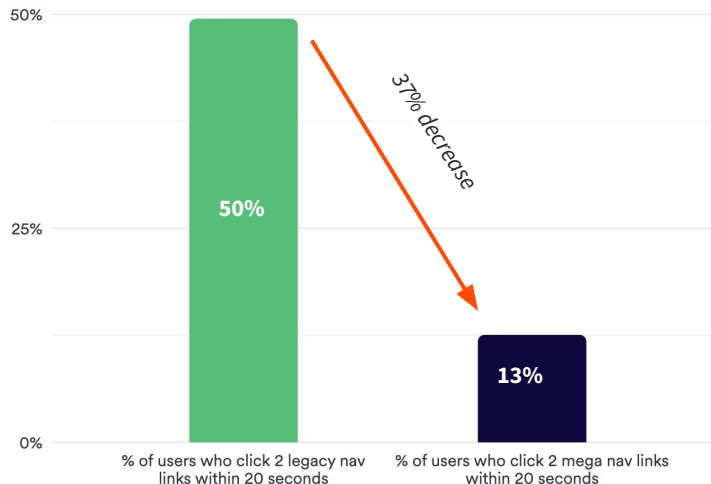**We are experimenting with new education to get 50% of users to pin**

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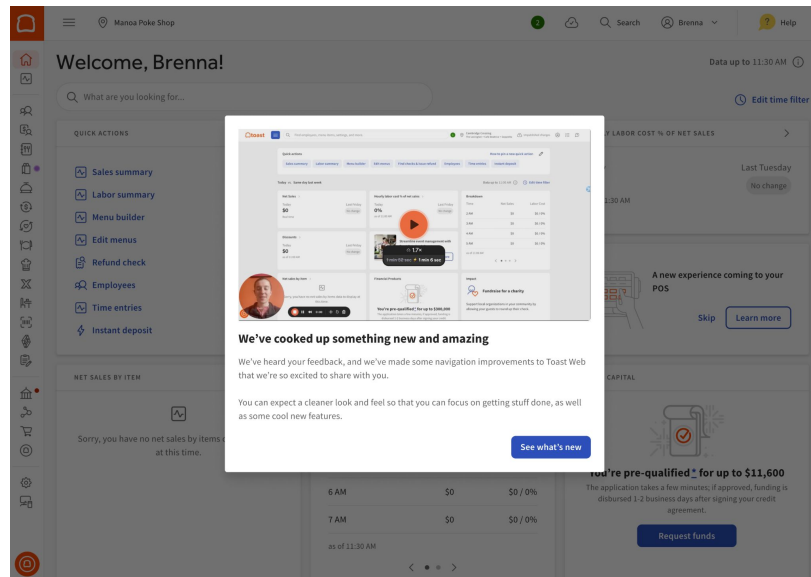
The new experience improves task success

Page Views per Session

13% decrease

7.12 → 6.18

| Legacy Experience | New Experience |

Customers get where they need to go by visiting fewer pages

Navigation Bounce Rate

37% decrease

50% → 13%

% of users who click 2 legacy nav links within 20 seconds

% of users who click 2 mega nav links within 20 seconds

Customers are far less likely to bounce off a page they navigated to

Data confirms qualitative feedback that the old left rail links were unintuitive, leading to frustrating bounces.

Page views Heap
Session clicks on new nav

New experience did not result in higher ticket volume

5% higher tickets 3 weeks after release not attributable to new search and nav via manual review of tickets

Tickets per 1k customer- Beta customers before and after New Search & Nav Experience
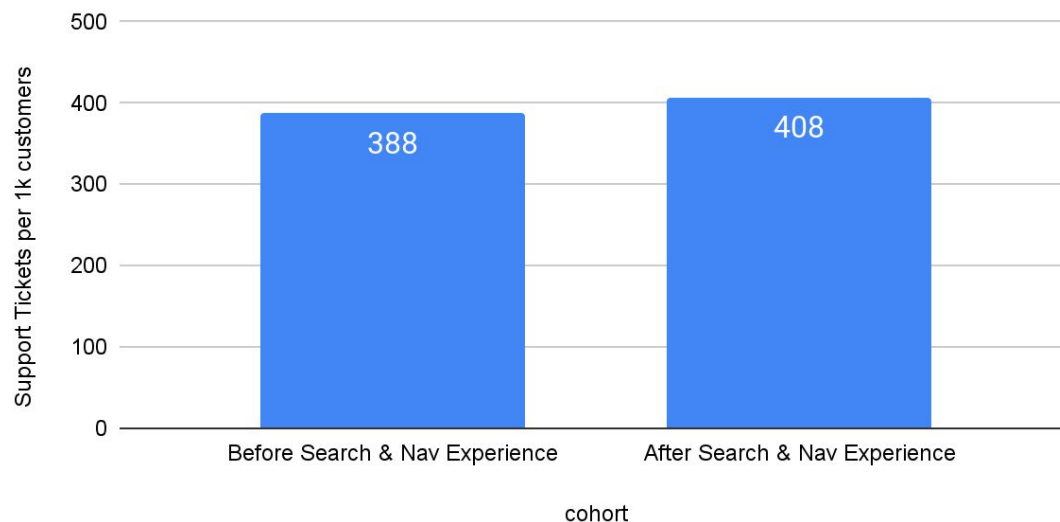
Search and Nav tickets by cohort Hex

Customers had mixed emotions transitioning to the new experience

We surveyed customers 10 days after access to the new experience, allowing an adjustment period before providing feedback. **The average score was 2.9/5. <u>Removing the link farm is the single biggest contributor to poor feedback and we are already building improvements to address this</u>**
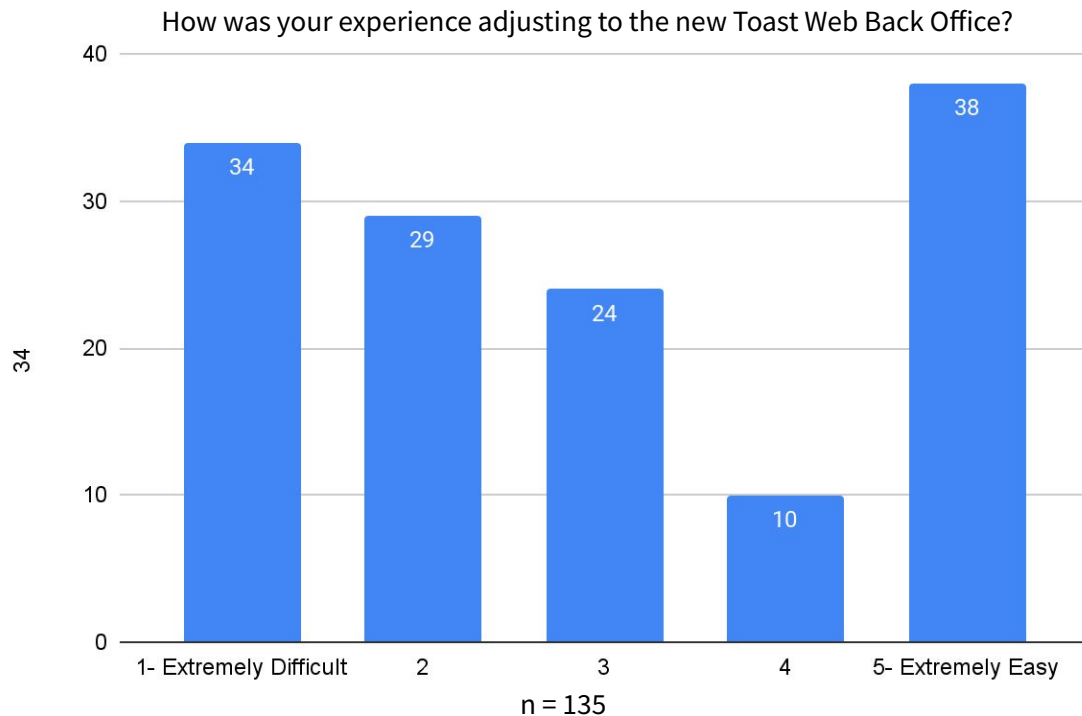
How was your experience adjusting to the new Toast Web Back Office?

n = 135

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Customers had mixed emotions changing to the new experience

How was your experience adjusting to the new Toast Web Back Office?

1- Extremely difficult **2** **3** **4** **5 - Extremely easy**

1/5
It was so much easier navigating with the old version it honestly didn't need to be revised in my personal opinion

this is so much worse than the old layout. super hard to find anything. can't do ctrl-f and find the function i was looking for like old big menu

No reason to change this is more complicated for no reason

I have tried to give the new lay out a chance, but… its much more cumbersome, trying to get to all of the settings.

This s*** sucks

3/5
I am just used to the old system but this new system was easy to learn

Not sure why it was necessary to do an entire overhaul of the formatting, but it hasn't been any more or less convenient than it was before.

still getting used to it. reps will make it easier

meh

Have to get used to it

5/5
I like the quick action bar where I can pin my most used options.

Love that I can pin quick actions. It would be awesome to have a way to customize the dashboard for reports. excellent choice

everything was intuitive and very understandable
Being able to customize quick actions really helps. We are a cafe, not a restaurant, so the reports we need tends to be different.

"The tech was great, had me back up and running in no time."

I really like the new layout. I was in a beta so I think i already had it. It's very nice

2/5
I do not like it. The old way was fine. Why don't you work on your tech support instead

I need to have all my manager functions on the page, not to search for them or just pin favorites.

Old interface was much more intuitive and easier to navigate

XtraChef was very difficult to find with the new layout and cannot be pinned to the quick action bar.

4/5
After getting the hang of how the menu is broken down, its really very intuitive.

I like the quick action bar where I can pin my most used options.

Enterprise customer anecdote: Velvet Taco

A number of enterprise customers have been testing the new experience in their labs

 # new-search-and-nav-mm-ent
Vanessa Mario and Mackenzie Kirtland

Mackenzie Kirtland 🤭 1 day ago
Hi team I have some feedback from Velvet Taco on the new UI

😰 1   ☺️+

Love quick actions and prominent search ➡️

Mackenzie Kirtland 🤭 1 day ago
So they said that it's nice that you can pin your top areas at the top, so if you are on the accounting team for example you can pin the reports that you need at the top each month instead of going in and searching for it. They said that the searchable "content" is great too.

Mackenzie Kirtland 🤭 1 day ago
they did however say that this is a big change, and for less tech savvy people or for people who do not do well with change, they would hope we would provide a decent heads up / resource guides

New

Miss the link farm ➡️

Mackenzie Kirtland 🤭 1 day ago
they also said they don't want their "quick links" at the bottom of Toastweb to go away as they are Self Managed and it's very helpful to have the quick links

Vanessa Mario 😌 1 day ago
Thanks so much Mackenzie this is super helpful and on par with what we've been hearing from other customers!

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The change was harder for more tenured customers, because they rely more heavily on the link farm

Shifting to the new experience was more difficult for older tenured customers

Search and Nav Survey Score vs. Toast Tenure

Data note: Heap was implemented in 2021. Even if customers started using TW before 2021, they will appear in the 2021 bucket.

Shifting to the new experience was slightly more difficult for lower cNPS customers

cNPS vs. Search and Nav Survey Response

Link to Visio Dashboard for Search & Nav survey Respondents

Negative feedback coming from link farm users

Link farm clicks per session

Legend: — All Toast   — 1 & 2 responses   — 4 & 5 responses

Date

This is the link farm … from 10 years ago

This is the link farm ... 5 years ago

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Removing the link farm is the single biggest driver of pain. It is many years out of date because any changes upset customers

The link farm is outdated & incomplete, but familiar. It gives users the perception that they are viewing a site map of Toast, when they're actually missing a ton of functionality.

- ❌ No link Marketing Hub/Assistant
- ❌ No link to Offers
- ❌ No link to xtrachef
- ❌ No link to Order Ready Board
- ❌ No link to financial management or Toast Capital
- ❌ No links to catering & events
- ❌ No link to Payroll
- ❌ No link to Retail
- ❌ No link to Scheduling
- ❌ No link to Toast Tables
- ❌ No link to Mobile Order & Pay
- ❌ Links to old sales summary
- ❌ Links to legacy settings pages
- ❌ No instant deposit

Impact of link farm:
- Provides **_no_** traffic to new products
- Confusion about different names ("rewards" vs "loyalty")
- Links have wrong destination

We are rapidly experimenting with ways to address these uncovered issues and mitigate user pain in this transition

We will de-risk the rollout by adding back the link farm temporarily. Continued experimentation with link farm users will identify a long term solution.

⚠️ *Link farm is not maintained; many links are missing or out of date* ⚠️

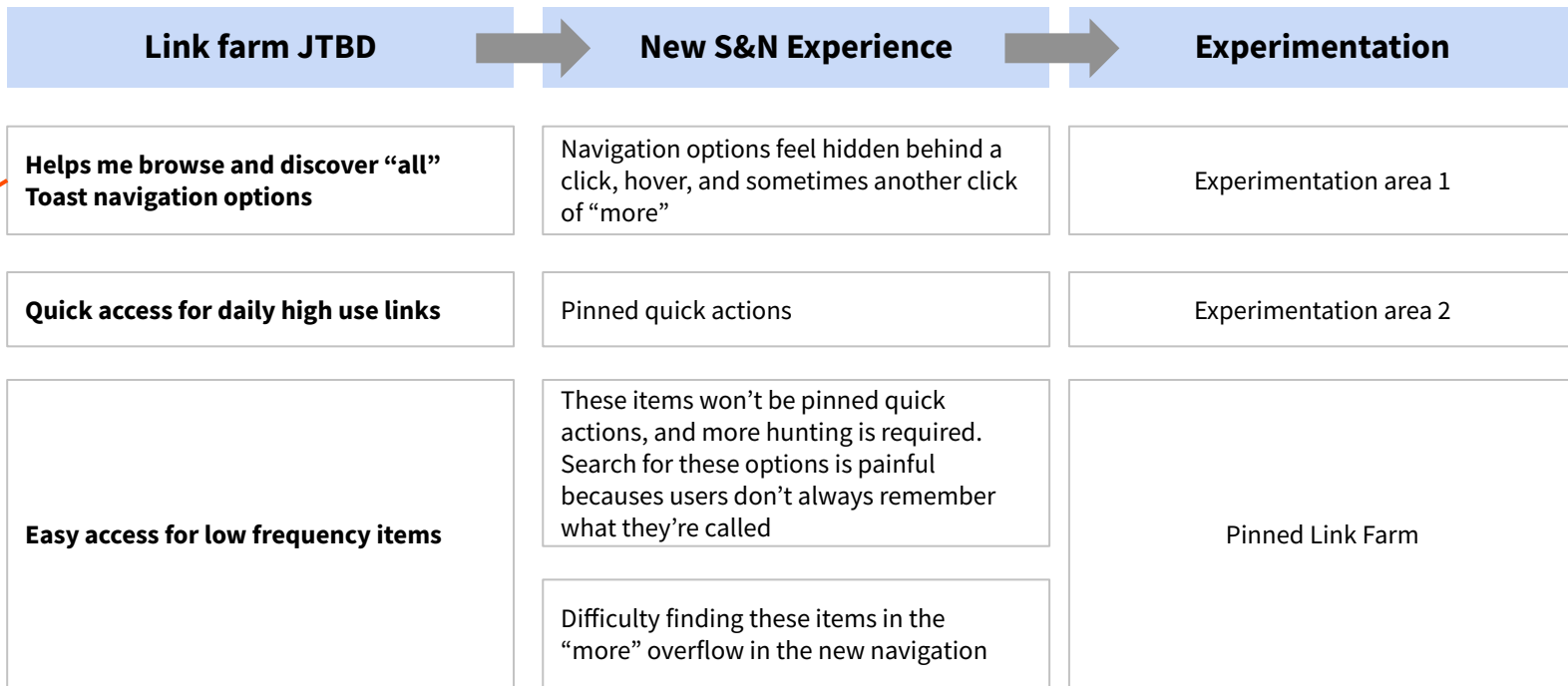| Link farm JTBD	→	New S&N Experience	→	Experimentation
Helps me browse and discover "all" Toast navigation options		Navigation options feel hidden behind a click, hover, and sometimes another click of "more"		Experimentation area 1
Quick access for daily high use links		Pinned quick actions		Experimentation area 2
Easy access for low frequency items		These items won't be pinned quick actions, and more hunting is required. Search for these options is painful because users don't always remember what they're called		Pinned Link Farm
		Difficulty finding these items in the "more" overflow in the new navigation		

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We are improving the rollout experience to mitigate discomfort with the change

Old experience for first 5k

New Experience going forward

Email warning of upcoming change
(often bounces or is missed) → In product warning of upcoming change

Restaurant didn't have control over change
(Feels like Toast is springing things on them) → User have agency in when change occurs

No trial period
(Restaurants must immediately adjust) → 2 weeks from opt-in to cut off period

New experience was a "one way door"
(Restaurants feel stuck) → Users can toggle in and out of new experience in trial period

Change happened for all users at a restaurant instantly → Change happens based on user

Improvements are coming to the back office on May 15th

We've improved navigation & search and introduced the ability to customize your quick actions. These changes will be going into effect on May 15th for all restaurants, but we wanted to give you a change to try it out sooner. **Learn more.**

| Not right now | Try new experience |
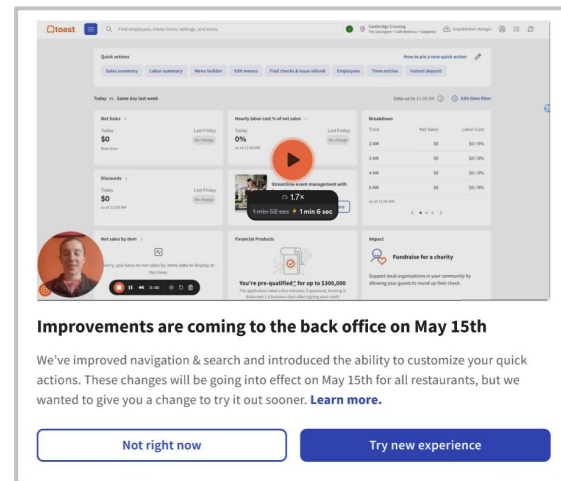
TL;DR: we will give users the ability to transition to the new experience on their own terms and provide them with trainings needed to get up to speed day 1 with minimal friction. (Date in screenshot is FIO).

Best practices from POS 3.0 learnings

Path forward

There are clear improvements in the new search & nav experience, but removing the link farm caused pain along with a rollout strategy that didn't mitigate change. We are driving rapid experimentation to learn more, aim high, and differentiate the new experience.

1. Make the new search and nav even more intuitive so it is a delightful experience for all users, new or tenured.
2. Increase usage of pinned quick actions
3. Improved rollout experience to mitigate change for customers
   - Opt in by user
   - Toggle back and forth during trial period

Appendix
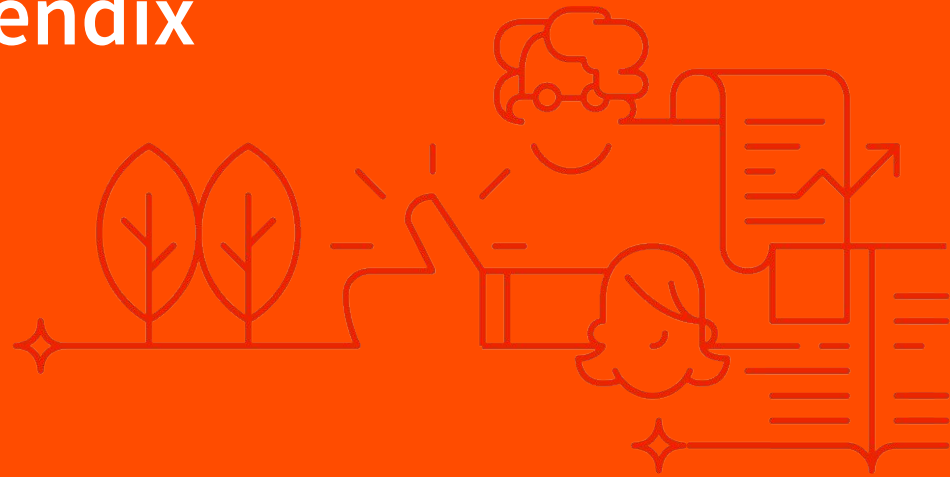
Agent feedback shows experience works and training will address any pain seen in rollout

Interviews with 4 agents to understand interactions with customers on new experience

Care ran a [focus group](#) with agents where they showed them the new experience and got their feedback.

New experience is disruptive for multi unit operators if not all locations are on the same interface
- We rolled out by management group instead of location for the Beta group to ensure a consistent experience for all locations in that group

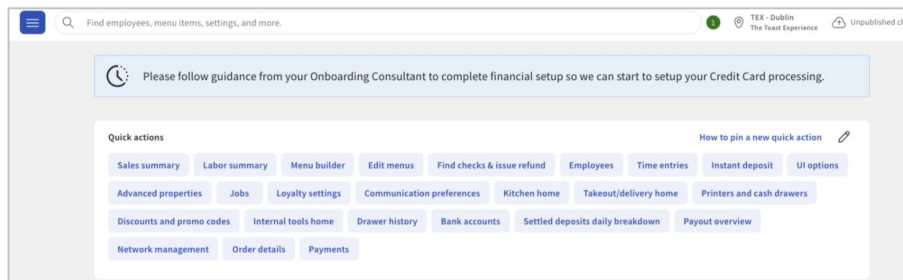Many Cxs are encountering the new UI when resolving their initial problem
- Building a more robust rollout experience

The primary Care concerns over expanding the New & Search will be addressed once the enablement piece is fleshed out and agents have been adequately trained

[New search and nav focus group insights (PSI)](#)

Care would prefer to have 1 search and navigation experience for all customers instead of having 2 experience live at the same time

Custom quick actions for agents

- We [surveyed a group of agents](#) to determine which pages they use most when helping customers
- From those responses, we built a custom list that will be the default for all agents so they can get to where they need to be in 1 click
- The lists are still customizable so they can add or remove based on what they need