

Re-imagine TurboTax Live's On-boarding Experience

DIY taxpayers lack confidence on how to use the TurboTax Live feature to access expert agent help. Design an improved on-boarding experience that will demonstrate the value of the product resulting in higher satisfaction and confidence when filing taxes with TurboTax.

Background

TurboTax is a user-friendly tax preparation software for taxpayers who want to do their taxes online. The experience asks you simple questions about your life so the software can do the heavy lifting of all the calculations needed to determine how much of a refund you'll get back or the amount of tax you owe. Once all the information has been entered, TurboTax will review everything for completion and accuracy and allow you to e-file your taxes with the government, without ever having to leave your home.

While TurboTax has been the primary choice for DIY tax prep software, about 6 million taxpayers abandon TurboTax each year. Half of those cases are from Fear, Uncertainty, and Doubt (FUD) that they are incapable of doing their own taxes accurately due to complicated life events (getting married, buying a home, owning a business, etc.), ultimately leading to the fear of being audited and/or uncertainty they aren't doing everything they can to get the highest refund possible.

TurboTax Live was created to connect live tax experts to customers who want the extra assurance that their taxes are being done correctly.

Customers can:

1. have their taxes reviewed and/or
2. have the experts do their taxes with them through real-time screen-sharing and one-way video chat (CPA can see the customer only, but not vice versa)

This way, taxpayers are more confident in filing their taxes while tax experts have a customer network, avoid data entry, and are getting more money.



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Design Challenge

Your team's challenge is to redesign the expectation setting screen in TurboTax Live, for newly onboarded customers. With the current experience, customers are less likely to understand all the benefits and less likely to reach out to tax experts. The purpose of this design challenge is to come up with a solution to help customers understand how to use and feel comfortable using TurboTax Live. As a result, they can get the maximum value out of the product and are confident in their outcome with TurboTax Live.

Key benefits we want to include:

- We have a team of tax experts (CPAs and Enrolled Agents) to support customers along their journey.
- Customers can connect with our team of experts as often as they need by clicking on [Expert Help] button.
- Customers can get expert reviews before they file.

Deliverable

The deliverable is an interactive paper or digital prototype. This prototype will showcase your concept of how to properly onboard new TurboTax Live customers. Your deliverable must include rationale for why you decided on the solution you are presenting.



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Considerations

- How do you efficiently introduce the product in the very beginning, knowing that a customer is eager to get started immediately?
- What would motivate a customer to reach out to a tax expert? Or not reach out?
- What elements can instill confidence on the customer?
- How can you prioritize information so that it is not overwhelming?
- How laidback or engaged do you want the customer to be when transitioning into this new product?
- How do you make sure the customer is getting value of the premium product that they are paying for?
- What criteria are you considering when making your final decision?





Glossary

CPA - Certified Public Accountant. In TurboTax, we also call them tax pros. They answer customers' tax questions, review them at the end, and help them file.

Debt - money that is owed either through credit cards, mortgage loans, school loans, car loans, etc.

Digital prototype - an interactive prototype that connects screens through hotspots (tools: POP, Invision, Proto.io) - you do NOT need to have a coded up prototype

On-boarding - the experience of how a customer learns how to use the product for the first time

Paper prototype - a series of sketches or printed out wireframes (black and white or color) that require a voice over to walkthrough the experience

Persona - users whose goals and characteristics represent the needs of a larger group of users

Rationale - reasons for the decisions you made during the design process

Storyboard - a sequence of drawings, with descriptions underneath, of how a customer might interact with your solution.

Wireframe - a representation of how a screen's content and functionality are laid out. Lower fidelity wireframes are typically black and white and contain just shapes and text. Higher fidelity wireframes, or mockups, include color, images, and icons.

