

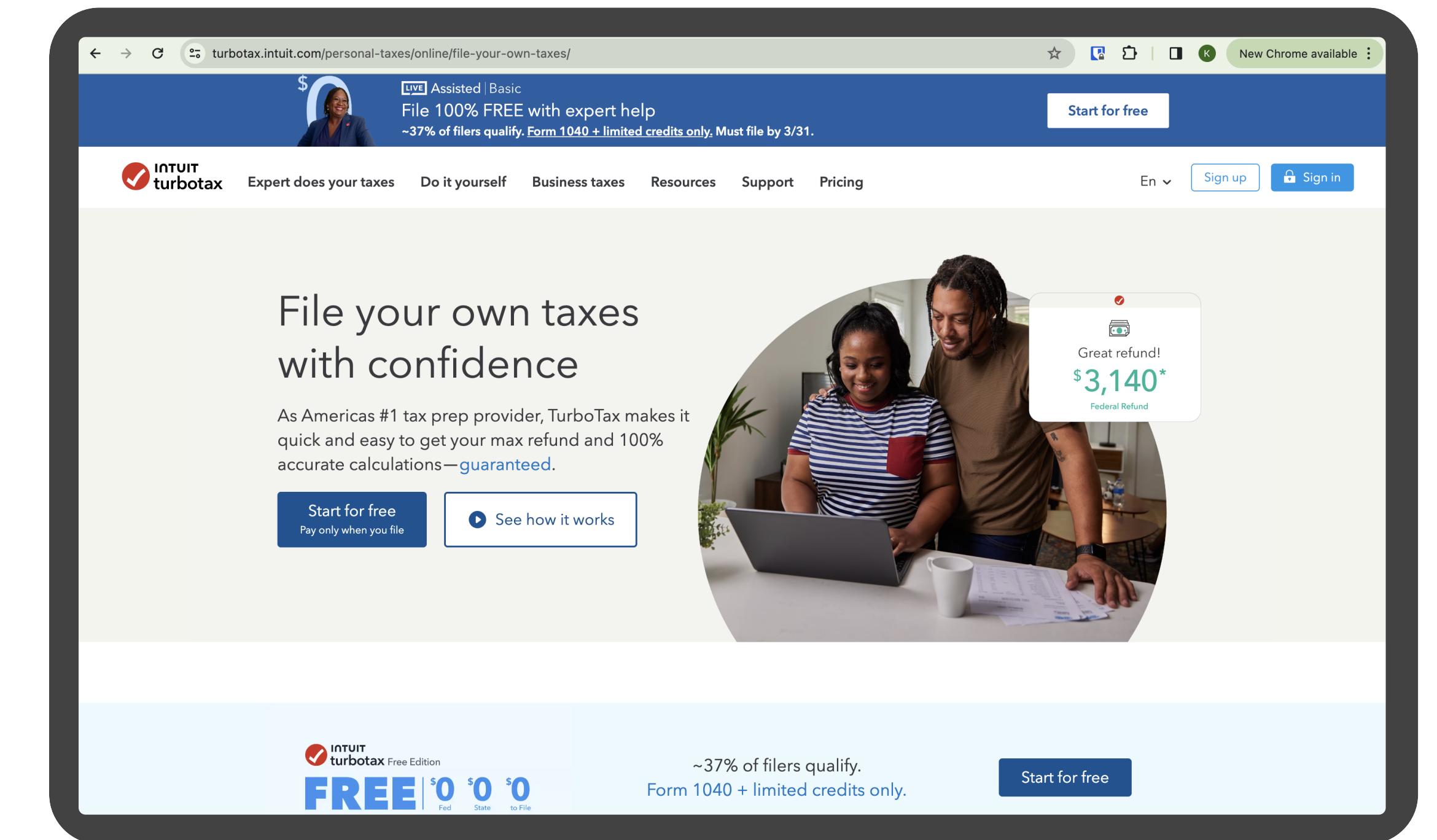
# Automating data entry through tax filing

**Karena Vongampai**

Case study from my time at Intuit TurboTax

# TurboTax is a DIY tax solution used by ~30 million customers

TurboTax is Intuit's flagship product that aims to simplify the complex and time consuming process that Americans go through each year to file their tax return.



## Problem statement

As a tax filer, I am trying to...

# Enter data into my tax return

One of the most common tax forms that Americans receive is the W-2. These forms have an average of 25 fields, and takes TurboTax users roughly 12 minutes to enter. For other forms like the 1099-B (investments), which each financial institution structures differently, this problem becomes even more severe.

**01** Minimize the number of errors I enter

**02** Minimize the time it takes to complete taxes

**03** Reduce anxiety, stress, and frustration

My objective

As the lead designer, I...

**Introduced new methods to automate data entry and designed reusable layouts to expand automation to the top 10 tax forms**

---

**3 months**

Timeframe

**Product & Engineering**

Team

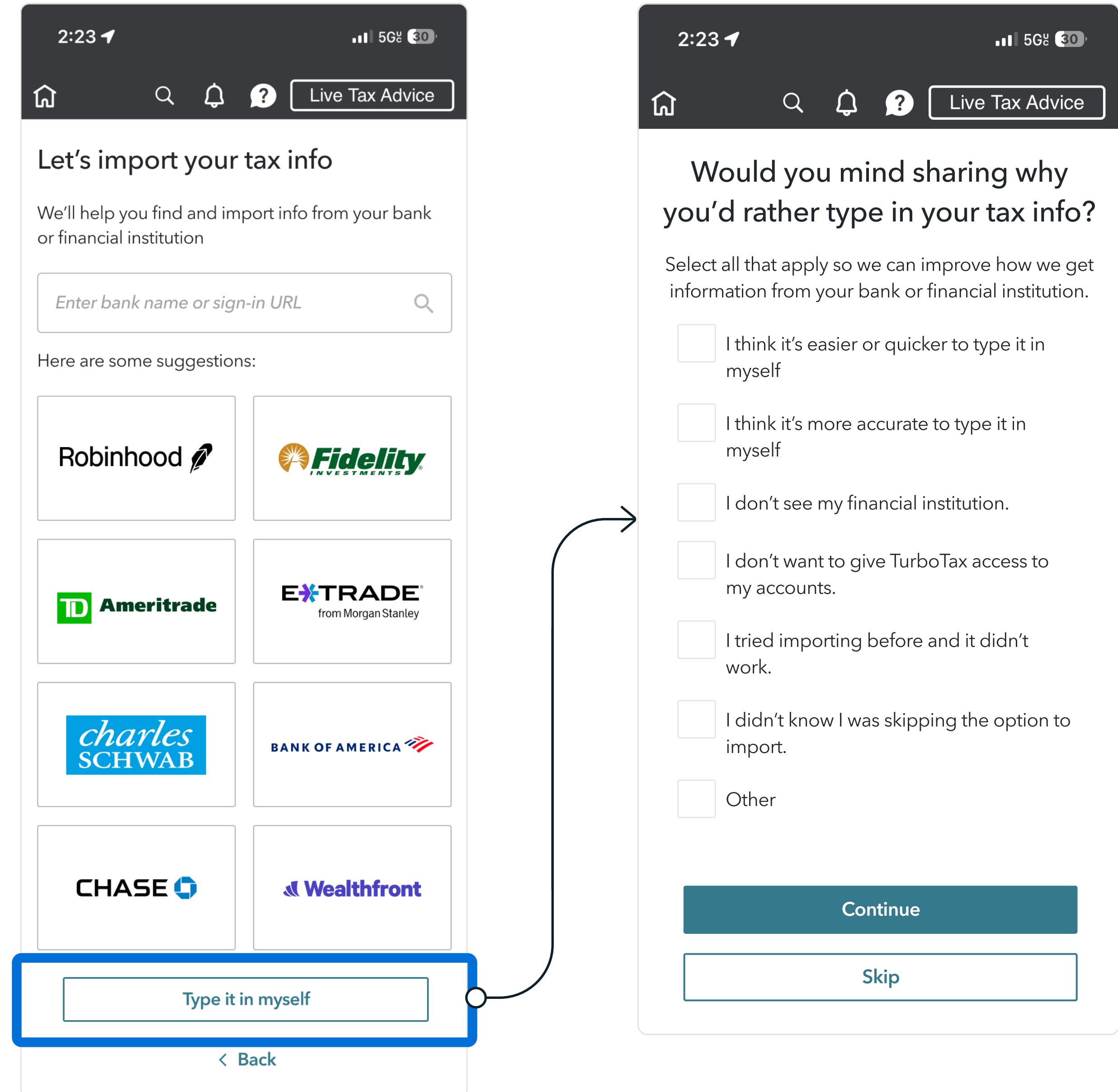
01

# Creating a plan

# Why weren't all TurboTax users importing their tax documents?

30% of all tax forms were automatically entered, but our business goal was to increase this to 55% by EOY. We had anecdotal information that explained why users did not import their forms from their financial institutions, but no quantitative data to identify the top blocker.

I pitched the idea of running a low-cost in-product survey to narrow in on the problem space.



# Importing tax docs for easier data entry wasn't a one size fits all solution

## Top survey responses

**01** “I tried importing before and it didn’t work”



Some forms are distributed physically or digitally to the user before it's available to import in TurboTax

**02** “I don't see my financial institution”



For each form we partner with a number of financial institutions, but our coverage isn't 100%

**03** “I don't want to give TurboTax access to my accounts



Some users expressed privacy concerns around sharing all their financial accounts with TurboTax

Creating a plan

# The vision for data entry

What we learned proved that automating data entry wasn't going to be a one-size fits all solution too. To meet user and business goals, we'd need various auto-entry methods.

2:23 5G 30

Live Tax Advice

Let's import your tax info

We'll help you find and import info from your bank or financial institution

Enter bank name or sign-in URL

Here are some suggestions:

- Robinhood
- Fidelity INVESTMENTS
- TD Ameritrade
- E\*TRADE from Morgan Stanley
- charles SCHWAB
- BANK OF AMERICA
- CHASE
- Wealthfront

Type it in myself

< Back

2:23 5G 30

Live Tax Advice

Upload your 1098-T

Use a PDF or even a picture of your form saved as JPG or PNG.

Browse

How can I get a digital copy of my form?

How many forms can I upload at once?

I'll type it in myself

< Back

2:23 5G 30

Live Tax Advice

Great choice! We'll get your form entered in no time

We'll help you take a picture-perfect image and then copy the info right to your tax return.

All you'll have to do is review.

Continue

< Back



# A/B test document upload as an alternate method to automatically enter tax data

## Can we increase the number of documents automatically entered?

We chose to test upload in tax forms with high extraction accuracy, number of fields, and manual users.

We landed on forms 1099-R and 1098-T.

## Are our machine learning models as accurate in the field?

Our centralized data platform team was developing new technology to accurately extract and map data from PDF files.

Forms 1099-R and 1098-T had high extraction and accuracy rates that we didn't think would do harm to the user experience.

## Should users self-select their automation method?

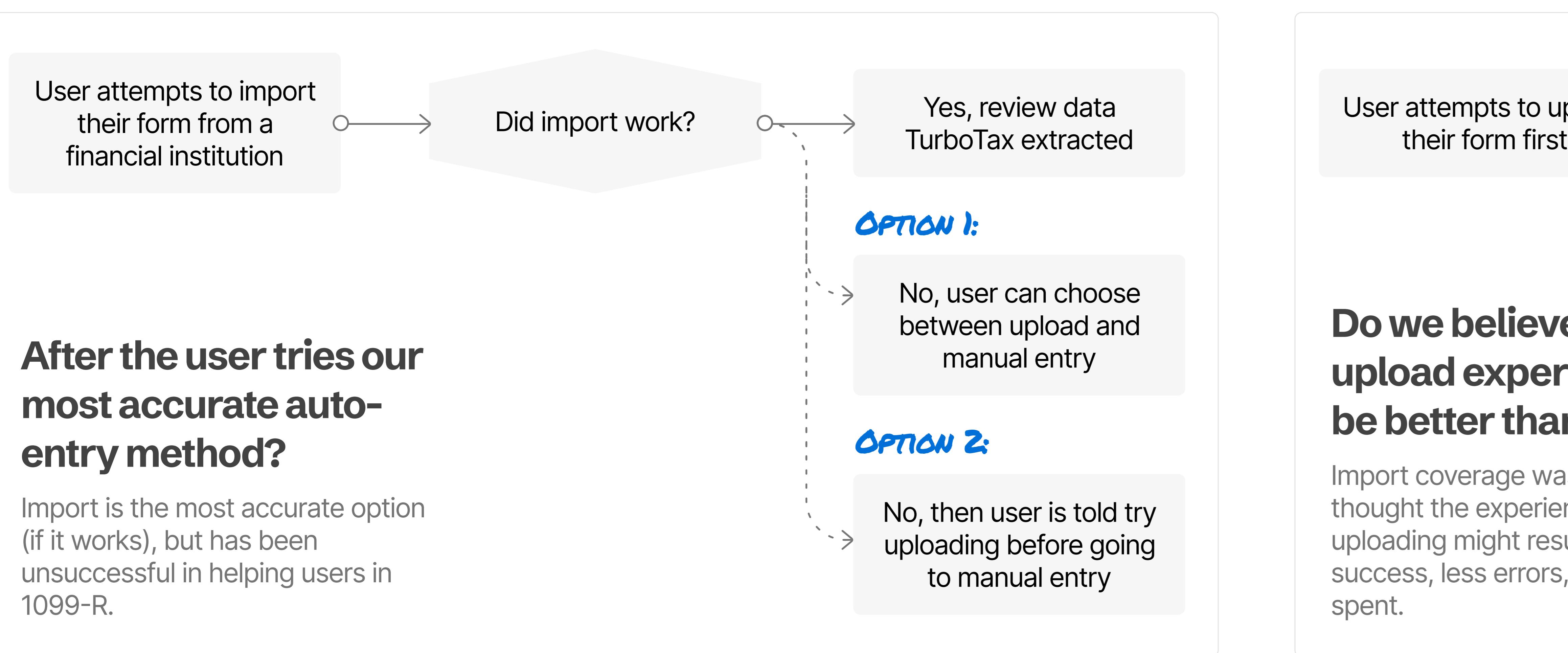
Import was the fastest and most accurate data entry method offered. If upload is just as good, should users be able to self select which method they want to use?

For 1099-R we tested 2 treatments against our existing experience.

02

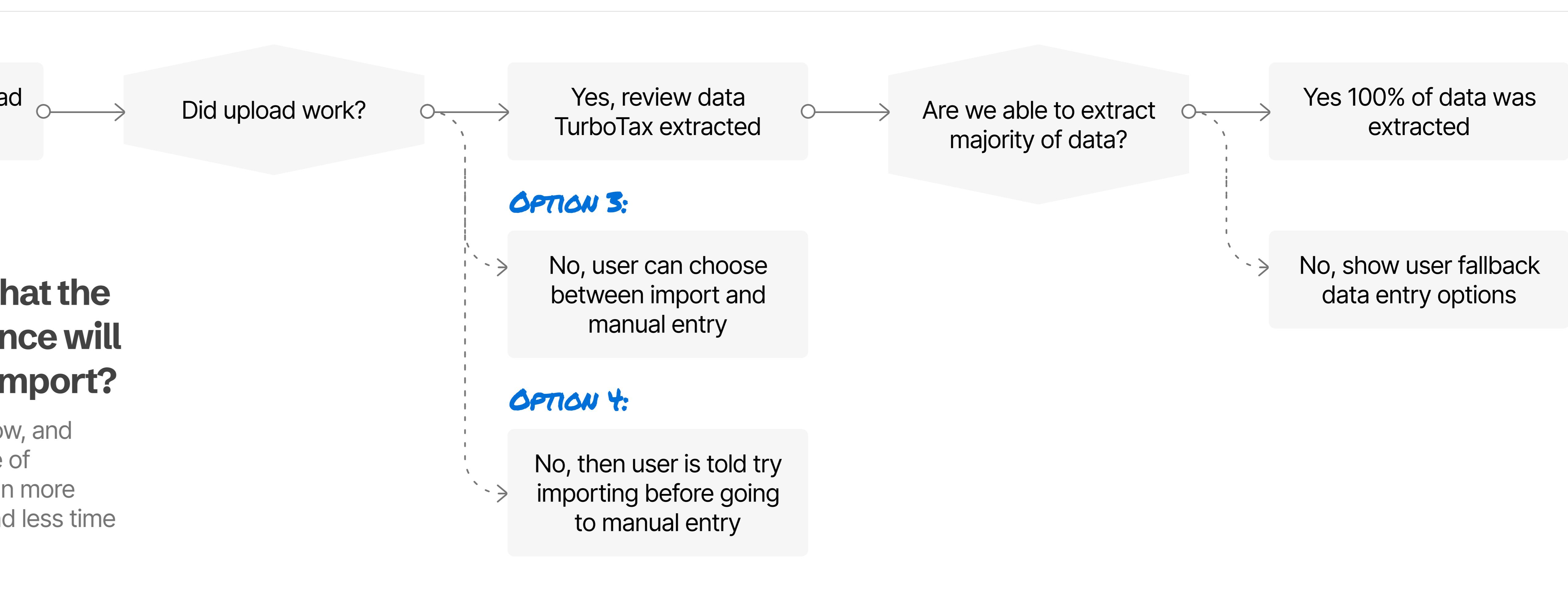
# Design explorations

# Where do we insert upload offer in 1099-R?



**After the user tries our most accurate auto-entry method?**

Import is the most accurate option (if it works), but has been unsuccessful in helping users in 1099-R.



**Do we believe that the upload experience will be better than import?**

Import coverage was low, and thought the experience of uploading might result in more success, less errors, and less time spent.

# Where do we insert upload offer in 1098-T

User attempts to upload their form first

Did upload work?

Yes, review data  
TurboTax extracted

**OPTION 1:**

No, user is prompted to do manual entry

**Do we believe that the upload experience will be better than manual entry?**

Definitely! And it should be faster, more accurate, and easier.

**OPTION 2:**

User can choose between upload and manual entry

Did upload work?

Yes, review data  
TurboTax extracted

No, user is prompted to do manual entry

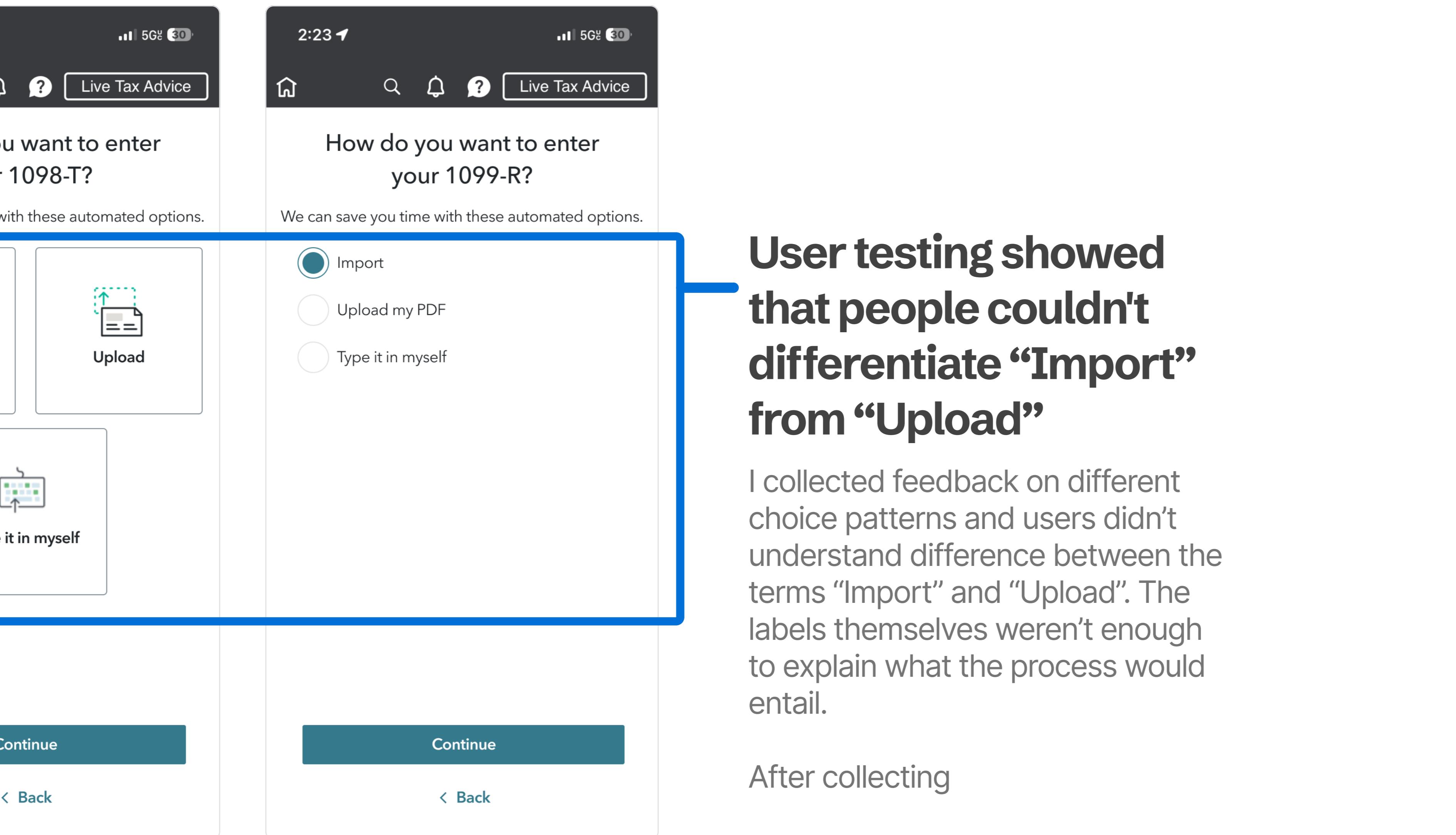
**Should we just let users choose their method of choice?**

Given that many users said privacy concerns caused them to choose manual entry over import, we weren't sure if choice was the best option.

# Focused explorations for presenting choice

With the intention of re-using across all 10 tax forms

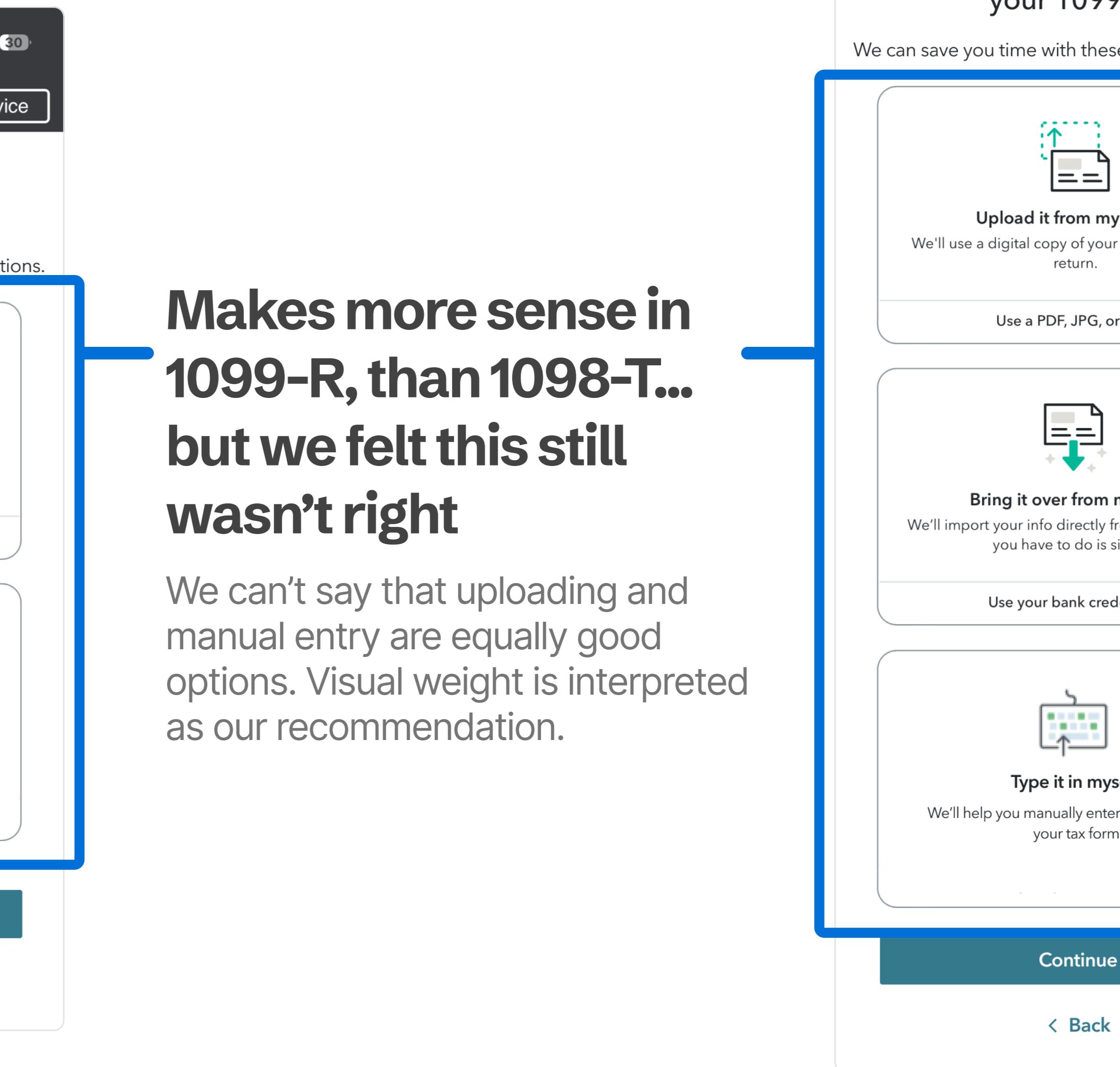
## IDEA I: ALL OPTIONS VISUALLY TREATED EQUAL



User testing showed that people couldn't differentiate "Import" from "Upload"

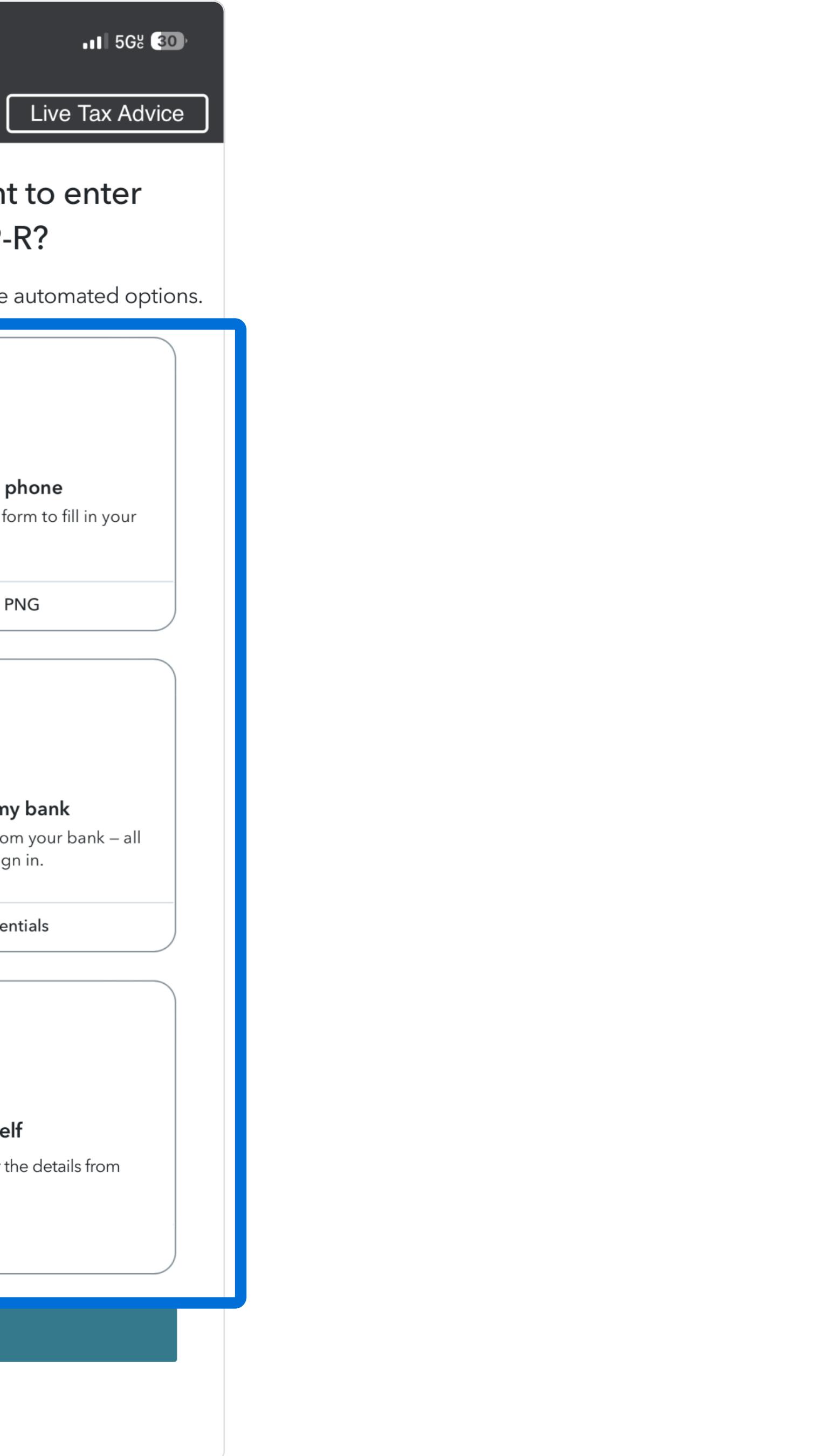
I collected feedback on different choice patterns and users didn't understand difference between the terms "Import" and "Upload". The labels themselves weren't enough to explain what the process would entail.

After collecting



Makes more sense in 1099-R, than 1098-T... but we felt this still wasn't right

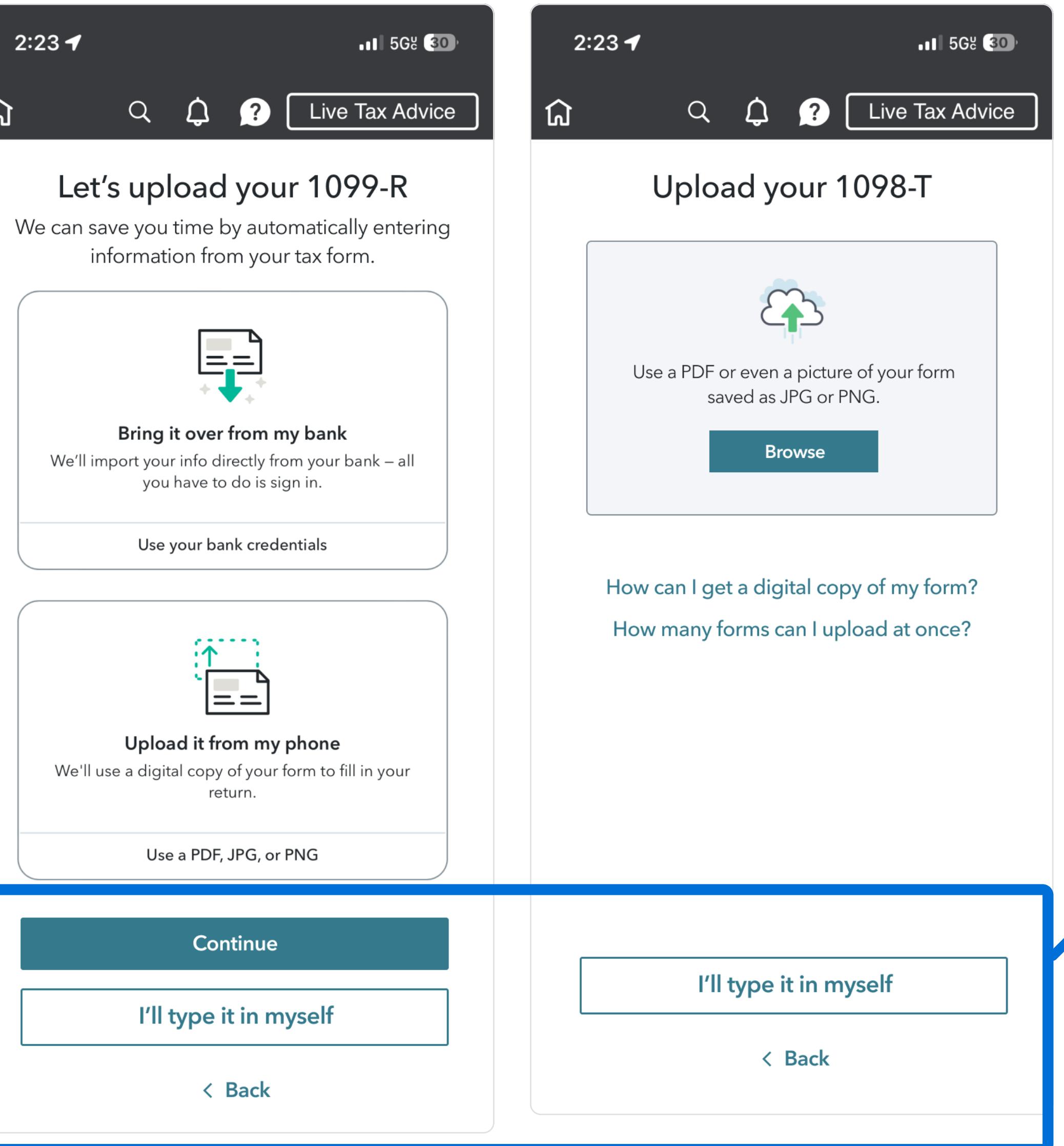
We can't say that uploading and manual entry are equally good options. Visual weight is interpreted as our recommendation.



# Focused explorations for presenting choice

With the intention of re-using across all 10 tax forms

## IDEA 2: ALL AUTOMATED OPTIONS HAVE EQUAL VISUAL WEIGHT, NOT MANUAL ENTRY



Represent options using tertiary button pattern

Typing it in requires users to do a lot more work, compared to auto-entry. This is why we gave it less visual weight on the screen.

Design explorations

# Focused explorations for reviewing extracted information

With the intention of re-using across all 10 tax forms

**IDEA 1: UPDATE TITLE COPY WI CONTENT DESIGN**

The image shows two side-by-side mobile application screenshots. Both screens have a header bar with a home icon, search icon, notification bell, help icon, and a 'Live Tax Advice' button. The top screen displays the title 'We got your 1099-R! Review your form and fill in any missing info'. Below this, there's a section titled 'Distribution info' with several input fields and checkboxes. The bottom screen displays the title 'Got it! Now let's review your 1099-R info'. Below this, there's a similar 'Distribution info' section with input fields and checkboxes.

Box Type	Description	Value
Box 1	Gross distribution	\$50,000
Box 2a	Taxable amount	\$50,000
Box 2a	Taxable amount checked	<input type="checkbox"/>
Box 2a	Total distribution checked	<input type="checkbox"/>
Box 3	Capital gain	\$12,200
Box 4	Federal income tax withheld	\$1,300
Box 5	Employee contributions or insurance premiums	\$400
Box 6	Net unrealized appreciation	\$12,200

**IDEA 2: ADD BANNER MESSAGE**

This mobile application screenshot shows a banner message at the top: 'Got it! Now let's review your 1099-INT'. Below the banner, there's a section titled 'Distribution info' with input fields and checkboxes. The banner message serves as a call-to-action, prompting the user to review the pulled information.

Box Type	Description	Value
Box 1	Gross distribution	\$50,000
Box 2a	Taxable amount	\$50,000
Box 2a	Taxable amount not determined box is checked	<input checked="" type="checkbox"/>
Box 2a	Total distribution is checked	<input type="checkbox"/>
Box 3	Capital gain	\$12,200
Box 4	Federal income tax withheld	\$1,300
Box 5	Employee contributions or insurance premiums	\$400
Box 6	Net unrealized appreciation	\$12,200

• We pulled 100% of the info from your form and all you have to do is review

• We strongly suggest reviewing the information we pulled

• Make changes if any info is missing

**The banner felt unnecessarily alarming**

On top of being a bit too alarming, we felt that it took up too much vertical space, since some forms have 10+ fields and checkboxes

# Focused explorations for reviewing poor data extraction

In the event that upload works, but a few fields are difficult to parse, users will need to fix automation's work

## IDEA 3: HIGHLIGHT THE PROBLEMATIC FIELDS

We got your 1099-R! Review your form and fill in any missing info

Distribution info

Box 1 - Gross distribution

Box 2a - Taxable amount

Box 2a - Taxable amount

Taxable amount not determined box is checked

Total distribution is checked

Box 3 - Capital gain

\$12,200

Box 4 - Federal income tax withheld

\$1,300

Box 5 - Employee contributions or insurance premiums

\$400

We tried, but couldn't get all the info from your form

Please review and fill in any missing info

Distribution info

Box 1 - Gross distribution

Box 2a - Taxable amount

Missing information

Box 2a - Taxable amount

Missing information

Box 3 - Capital gain

\$12,200

Box 4 - Federal income tax withheld

\$1,300

Box 5 - Employee contributions or insurance premiums

## IDEA 4: ERROR STATES

Hmm... we're having trouble uploading your file

INTUIT(W-2).pdf

Here are some common fixes that might help:

- Make sure the file you're uploading contains a W-2 form.
- Try downloading your file again from where you got it in case it's damaged.
- Check your internet, a slow connection can interrupt your upload.
- Make sure your file isn't password protected.
- Wait a few minutes and try again.

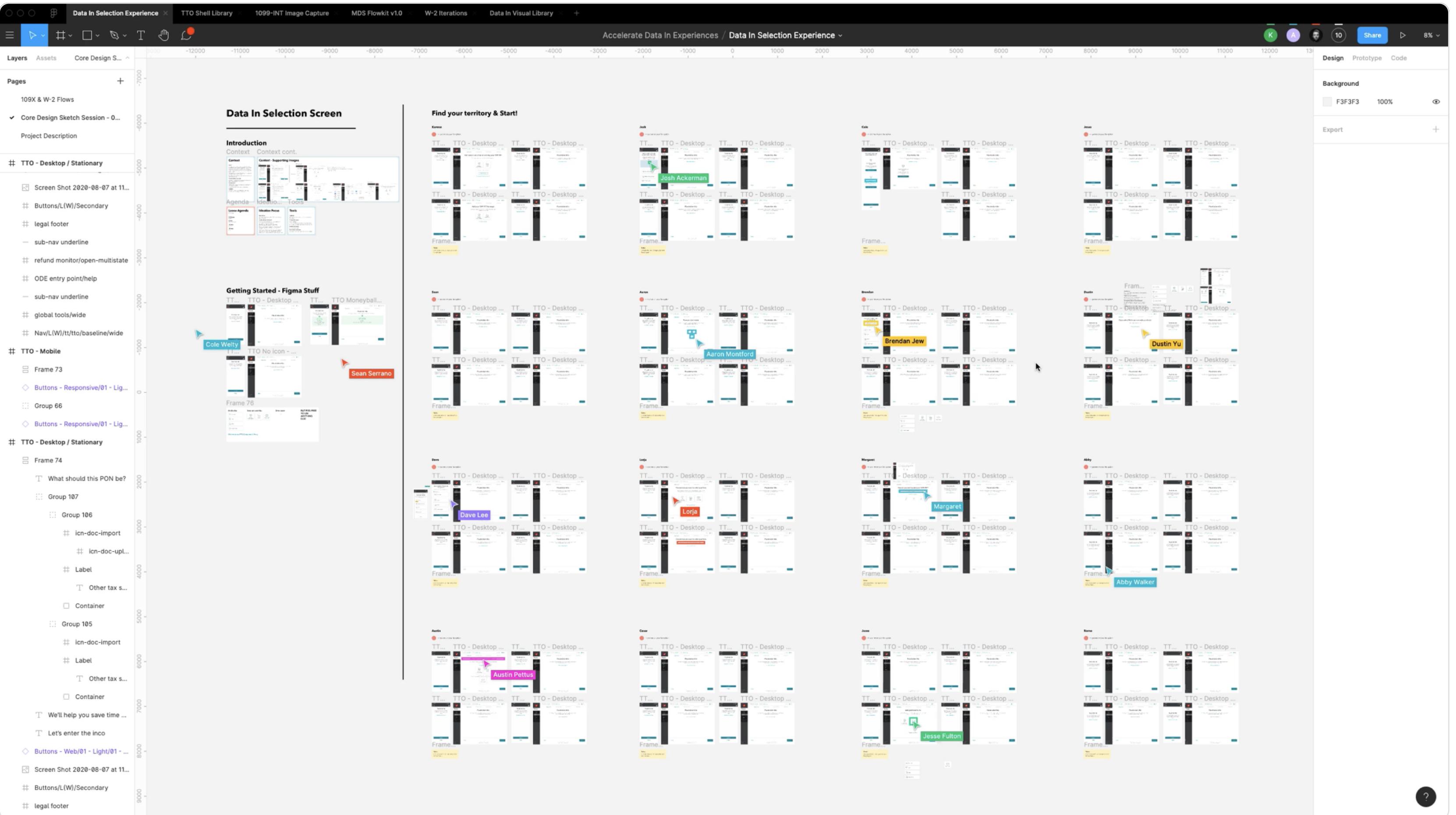
Try uploading again

Change how I enter my form

< Back

# Group brainstorm

To help me generate ideas I got a group of designers (visual, product, and content) together to sketch.

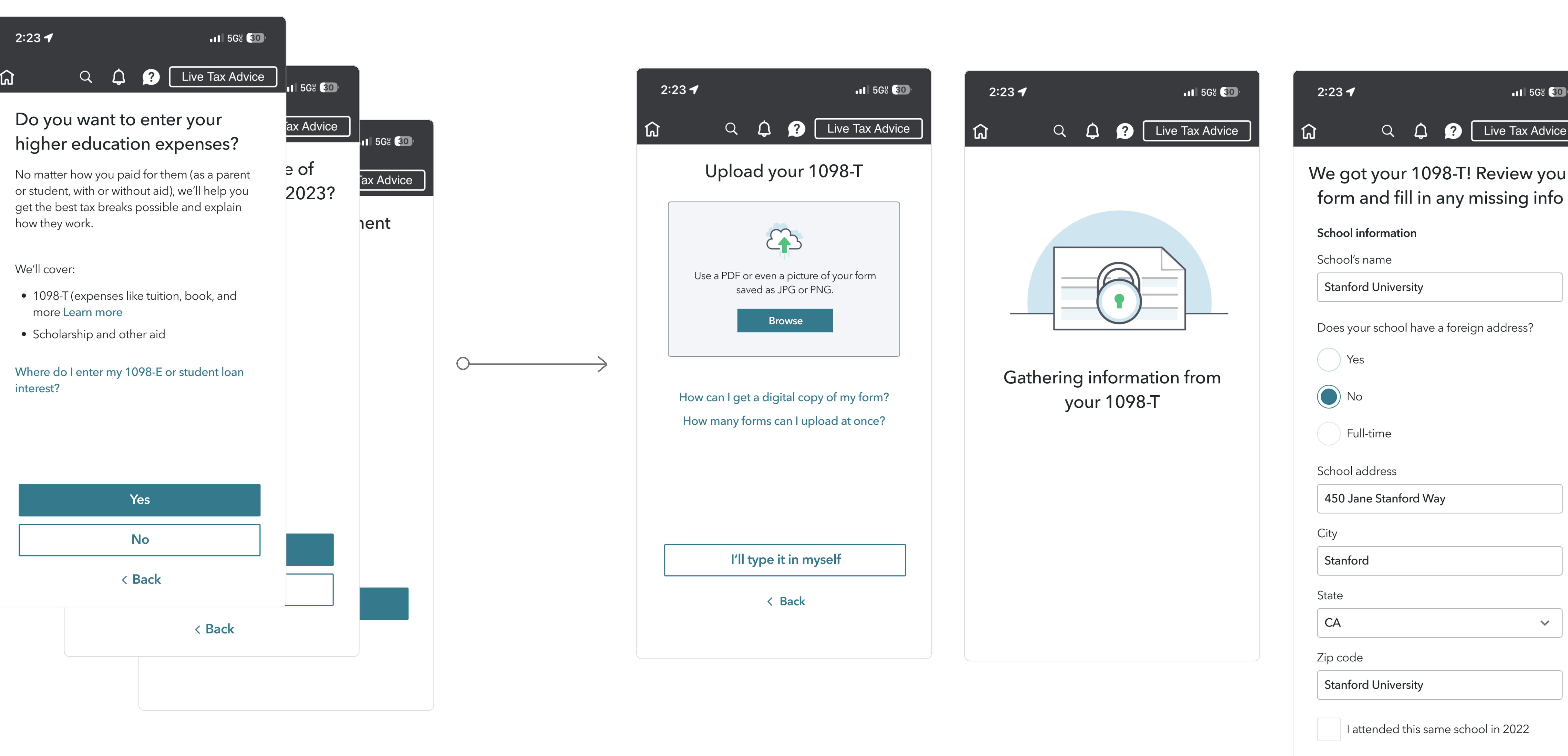


03

## A/B test treatments

# 1098-T upload treatment

We ran the A/B test first in 1098-T, and used a choice selection screen that de-emphasized the manual entry option, because we thought upload would provide a more efficient and satisfying user experience.



## Design explorations

# 1099-R upload treatment

Next, we ran the 1099-R A/B test. This design was different compared to 1098-T, since the experience offered import. When import works, it is the fastest and most accurate automation method, so we offered upload as a fall-back option.

Let's import your tax info  
We'll help you find and import info from your bank or financial institution

Enter bank name or sign-in URL

Here are some suggestions:

- Robinhood
- Fidelity INVESTMENTS
- TD Ameritrade
- E\*TRADE from Morgan Stanley
- charles SCHWAB
- BANK OF AMERICA
- CHASE
- Wealthfront

Change how I enter my form

How do you want to enter your 1099-R?

We can save you time with these automated options.

- Upload it from my phone: We'll use a digital copy of your form to fill in your return.
- Use a PDF, JPG, or PNG
- Bring it over from my bank: We'll import your info directly from your bank – all you have to do is sign in.
- Use your bank credentials

I'll type it in myself

Continue

Type it in myself

< Back

Upload your 1099-R

We got your 1099-R! Review your form and fill in any missing info

Provider info

Who paid you? (Payer)  
Vanguard Retirement

Payer name continued (optional)

Address type  
U.S. address

Payer's address  
100 Vanguard Boulevard

City  
Malvern

State  
PA

Payer's TIN  
88-909378933

Continue

< Back

We got your 1099-R! Review your form and fill in any missing info

Distribution info

Box 1 - Gross distribution  
\$50,000

Box 2a - Taxable amount  
\$50,000

Box 2a - Taxable amount  
 Taxable amount not determined box is checked  
 Total distribution is checked

Box 3 - Capital gain  
\$12,200

Box 4 - Federal income tax withheld  
\$1,300

Box 5 - Employee contributions or insurance premiums  
\$400

Box 6 - Net unrealized appreciation  
\$0

Box 7 - Distribution code  
B

04

# Results & Reflection

# A/B test results

Form	Results	Details
1098-T	Successful!	50,000 forms automatically entered, 93% accuracy rate, and did no harm to conversion
1099-R	Needs improvement	10,000 forms uploaded, but had poor extraction accuracy (at 50%). Conversion rate dropped from 60% to 50%. We turned off upload until our sister team could improve accuracy and product could prioritize replatforming the legacy tax topic.

## Design explorations

# Related projects

We continued to also test upload inside of W-2, and the results showed that offering upload in addition to import would increase the number of users who automatically enter tax forms. We made a multi-year roadmap to assess and expand to the top 10 tax forms.

I also re-used the selection screen pattern to show the option for users to snap a photo from their mobile device to automatically enter their data too.

The image displays three mobile phone screens showing different steps in a tax form entry process, followed by a detailed view of a 1099-INT tax form.

**Screen 1: How do you want to enter your 1099-INT?**

We can save you time with these automated options.

- Snap a photo**  
Take a picture of your form and we'll use it to autofill your return. Snap. Tap. Done.  
Use your phone's camera
- Bring it over from my bank**  
We'll import your info directly from your bank – all you have to do is sign in.  
Use your bank credentials
- Upload it from my phone**  
We'll use a digital copy of your form to fill in your return.  
Use a PDF, JPG, or PNG

**Screen 2: Great choice! We'll get your form entered in no time**

We'll help you take a picture-perfect image and then copy the info right to your tax return.

All you'll have to do is review.

**Screen 3: Great choice! We'll get your form entered in no time**

We'll help you take a picture-perfect image and then copy the info right to your tax return.

**"TurboTax" Would Like to Access the Camera**

TurboTax would like access to your camera to enable features to help save you time, like taking and uploading pictures, scanning barcodes, and using augmented reality.

**OK** **Don't Allow**

**Detailed View: 1099-INT Tax Form**

Form No. 1545-0112  
**Form 1099-INT**  
For calendar year 20XX

**PAYER'S name, street address, city or town, state or province, country, and telephone no., or foreign postal code, and telephone no.**

JIM GARRY  
40 HERNDON PARKWAY, SUITE 120  
HERNDON, VA 20170  
703-329-0326

**RECIPIENT'S TIN**  
12-5290324      102110093

**FATCA filing requirement**  
 **VOID**  **CORRECTED**

**RECIPIENT'S name**  
JIM GARRY  
Street address (including apt. no.)  
650 HERNDON PARKWAY, SUITE 140  
City or town, state or province, country, and zip or foreign postal code  
HERNDON, VA 20170

**Account number (see instructions)**  
2156903450

**Interest Income**  
For State Tax Department

**Copy 1**

**1 Interest income**  
\$ 170,000.00  
2 Early withdrawal penalty  
\$ 18,500.00

**3 Interest on U.S. Savings Bonds and Treasury obligations**  
\$ 1,500.00

**4 Federal income tax withheld**  
\$ 4,500.00

**5 Investment expenses**  
\$ 0.00

**6 Foreign tax credit**  
\$ 0.00

**7 Foreign currency or U.S. possession**  
\$ 0.00

**8 State/ private activity bond interest**  
\$ 1,500.00

**9 Bond premium**  
\$ 0.00

**10 Market discount**  
\$ 0.00

**11 Bond premium**  
\$ 0.00

**12 Bond premium on Treasury obligations**  
\$ 0.00

**13 Bond premium on tax-exempt bond**  
\$ 0.00

**14 Tax-exempt and tax credit bond CUSIP no.**  
MD 222170

**15 State identification no.**  
\$ 400.00

**16 State tax withheld**  
\$ 0.00

**17 State tax withheld**  
\$ 0.00

**18 State tax withheld**  
\$ 0.00

**19 State tax withheld**  
\$ 0.00

**20 State tax withheld**  
\$ 0.00

**21 State tax withheld**  
\$ 0.00

**22 State tax withheld**  
\$ 0.00

**23 State tax withheld**  
\$ 0.00

**24 State tax withheld**  
\$ 0.00

**25 State tax withheld**  
\$ 0.00

**26 State tax withheld**  
\$ 0.00

**27 State tax withheld**  
\$ 0.00

**28 State tax withheld**  
\$ 0.00

**29 State tax withheld**  
\$ 0.00

**30 State tax withheld**  
\$ 0.00

**31 State tax withheld**  
\$ 0.00

**32 State tax withheld**  
\$ 0.00

**33 State tax withheld**  
\$ 0.00

**34 State tax withheld**  
\$ 0.00

**35 State tax withheld**  
\$ 0.00

**36 State tax withheld**  
\$ 0.00

**37 State tax withheld**  
\$ 0.00

**38 State tax withheld**  
\$ 0.00

**39 State tax withheld**  
\$ 0.00

**40 State tax withheld**  
\$ 0.00

**41 State tax withheld**  
\$ 0.00

**42 State tax withheld**  
\$ 0.00

**43 State tax withheld**  
\$ 0.00

**44 State tax withheld**  
\$ 0.00

**45 State tax withheld**  
\$ 0.00

**46 State tax withheld**  
\$ 0.00

**47 State tax withheld**  
\$ 0.00

**48 State tax withheld**  
\$ 0.00

**49 State tax withheld**  
\$ 0.00

**50 State tax withheld**  
\$ 0.00

**51 State tax withheld**  
\$ 0.00

**52 State tax withheld**  
\$ 0.00

**53 State tax withheld**  
\$ 0.00

**54 State tax withheld**  
\$ 0.00

**55 State tax withheld**  
\$ 0.00

**56 State tax withheld**  
\$ 0.00

**57 State tax withheld**  
\$ 0.00

**58 State tax withheld**  
\$ 0.00

**59 State tax withheld**  
\$ 0.00

**60 State tax withheld**  
\$ 0.00

**61 State tax withheld**  
\$ 0.00

**62 State tax withheld**  
\$ 0.00

**63 State tax withheld**  
\$ 0.00

**64 State tax withheld**  
\$ 0.00

**65 State tax withheld**  
\$ 0.00

**66 State tax withheld**  
\$ 0.00

**67 State tax withheld**  
\$ 0.00

**68 State tax withheld**  
\$ 0.00

**69 State tax withheld**  
\$ 0.00

**70 State tax withheld**  
\$ 0.00

**71 State tax withheld**  
\$ 0.00

**72 State tax withheld**  
\$ 0.00

**73 State tax withheld**  
\$ 0.00

**74 State tax withheld**  
\$ 0.00

**75 State tax withheld**  
\$ 0.00

**76 State tax withheld**  
\$ 0.00

**77 State tax withheld**  
\$ 0.00

**78 State tax withheld**  
\$ 0.00

**79 State tax withheld**  
\$ 0.00

**80 State tax withheld**  
\$ 0.00

**81 State tax withheld**  
\$ 0.00

**82 State tax withheld**  
\$ 0.00

**83 State tax withheld**  
\$ 0.00

**84 State tax withheld**  
\$ 0.00

**85 State tax withheld**  
\$ 0.00

**86 State tax withheld**  
\$ 0.00

**87 State tax withheld**  
\$ 0.00

**88 State tax withheld**  
\$ 0.00

**89 State tax withheld**  
\$ 0.00

**90 State tax withheld**  
\$ 0.00

**91 State tax withheld**  
\$ 0.00

**92 State tax withheld**  
\$ 0.00

**93 State tax withheld**  
\$ 0.00

**94 State tax withheld**  
\$ 0.00

**95 State tax withheld**  
\$ 0.00

**96 State tax withheld**  
\$ 0.00

**97 State tax withheld**  
\$ 0.00

**98 State tax withheld**  
\$ 0.00

**99 State tax withheld**  
\$ 0.00

**100 State tax withheld**  
\$ 0.00

**101 State tax withheld**  
\$ 0.00

**102 State tax withheld**  
\$ 0.00

**103 State tax withheld**  
\$ 0.00

**104 State tax withheld**  
\$ 0.00

**105 State tax withheld**  
\$ 0.00

**106 State tax withheld**  
\$ 0.00

**107 State tax withheld**  
\$ 0.00

**108 State tax withheld**  
\$ 0.00

**109 State tax withheld**  
\$ 0.00

**110 State tax withheld**  
\$ 0.00

**111 State tax withheld**  
\$ 0.00

**112 State tax withheld**  
\$ 0.00

**113 State tax withheld**  
\$ 0.00

**114 State tax withheld**  
\$ 0.00

**115 State tax withheld**  
\$ 0.00

**116 State tax withheld**  
\$ 0.00

**117 State tax withheld**  
\$ 0.00

**118 State tax withheld**  
\$ 0.00

**119 State tax withheld**  
\$ 0.00

**120 State tax withheld**  
\$ 0.00

**121 State tax withheld**  
\$ 0.00

**122 State tax withheld**  
\$ 0.00

**123 State tax withheld**  
\$ 0.00

**124 State tax withheld**  
\$ 0.00

**125 State tax withheld**  
\$ 0.00

**126 State tax withheld**  
\$ 0.00

**127 State tax withheld**  
\$ 0.00

**128 State tax withheld**  
\$ 0.00

**129 State tax withheld**  
\$ 0.00

**130 State tax withheld**  
\$ 0.00

**131 State tax withheld**  
\$ 0.00

**132 State tax withheld**  
\$ 0.00

**133 State tax withheld**  
\$ 0.00

**134 State tax withheld**  
\$ 0.00

**135 State tax withheld**  
\$ 0.00

**136 State tax withheld**  
\$ 0.00

**137 State tax withheld**  
\$ 0.00

**138 State tax withheld**  
\$ 0.00

**139 State tax withheld**  
\$ 0.00

**140 State tax withheld**  
\$ 0.00

**141 State tax withheld**  
\$ 0.00

**142 State tax withheld**  
\$ 0.00

**143 State tax withheld**  
\$ 0.00

**144 State tax withheld**  
\$ 0.00

**145 State tax withheld**  
\$ 0.00

**146 State tax withheld**  
\$ 0.00

**147 State tax withheld**  
\$ 0.00

**148 State tax withheld**  
\$ 0.00

**149 State tax withheld**  
\$ 0.00

**150 State tax withheld**  
\$ 0.00

**151 State tax withheld**  
\$ 0.00

**152 State tax withheld**  
\$ 0.00

**153 State tax withheld**  
\$ 0.00

**154 State tax withheld**  
\$ 0.00

**155 State tax withheld**  
\$ 0.00

**156 State tax withheld**  
\$ 0.00

**157 State tax withheld**  
\$ 0.00

**158 State tax withheld**  
\$ 0.00

**159 State tax withheld**  
\$ 0.00

**160 State tax withheld**  
\$ 0.00

**161 State tax withheld**  
\$ 0.00

**162 State tax withheld**  
\$ 0.00

**163 State tax withheld**  
\$ 0.00

**164 State tax withheld**  
\$ 0.00

**165 State tax withheld**  
\$ 0.00

**166 State tax withheld**  
\$ 0.00

**167 State tax withheld**  
\$ 0.00

**168 State tax withheld**  
\$ 0.00

**169 State tax withheld**  
\$ 0.00

**170 State tax withheld**  
\$ 0.00

**171 State tax withheld**  
\$ 0.00

**172 State tax withheld**  
\$ 0.00

**173 State tax withheld**  
\$ 0.00

**174 State tax withheld**  
\$ 0.00

**175 State tax withheld**  
\$ 0.00

**176 State tax withheld**  
\$ 0.00

**177 State tax withheld**  
\$ 0.00

**178 State tax withheld**  
\$ 0.00

**179 State tax withheld**  
\$ 0.00

**180 State tax withheld**  
\$ 0.00

**181 State tax withheld**  
\$ 0.00

**182 State tax withheld**  
\$ 0.00

**183 State tax withheld**  
\$ 0.00

**184 State tax withheld**  
\$ 0.00

**185 State tax withheld**  
\$ 0.00

**186 State tax withheld**  
\$ 0.00

**187 State tax withheld**  
\$ 0.00

**188 State tax withheld**  
\$ 0.00

**189 State tax withheld**  
\$ 0.00

**190 State tax withheld**  
\$ 0.00

**191 State tax withheld**  
\$ 0.00

**192 State tax withheld**  
\$ 0.00

**193 State tax withheld**  
\$ 0.00

**194 State tax withheld**  
\$ 0.00

**195 State tax withheld**  
\$ 0.00

**196 State tax withheld**  
\$ 0.00

**197 State tax withheld**  
\$ 0.00

**198 State tax withheld**  
\$ 0.00

**199 State tax withheld**  
\$ 0.00

**200 State tax withheld**  
\$ 0.00

**201 State tax withheld**  
\$ 0.00

**202 State tax withheld**  
\$ 0.00

**203 State tax withheld**  
\$ 0.00

**204 State tax withheld**  
\$ 0.00

**205 State tax withheld**  
\$ 0.00

**206 State tax withheld**  
\$ 0.00

**207 State tax withheld**  
\$ 0.00

**208 State tax withheld**  
\$ 0.00

**209 State tax withheld**  
\$ 0.00

**210 State tax withheld**  
\$ 0.00

**211 State tax withheld**  
\$ 0.00

**212 State tax withheld**  
\$ 0.00

**213 State tax withheld**  
\$ 0.00

**214 State tax withheld**  
\$ 0.00

**215 State tax withheld**  
\$ 0.00

**216 State tax withheld**  
\$ 0.00

**217 State tax withheld**  
\$ 0.00

**218 State tax withheld**  
\$ 0.00

**219 State tax withheld**  
\$ 0.00

**220 State tax withheld**  
\$ 0.00

**221 State tax withheld**  
\$ 0.00

**222 State tax withheld**  
\$ 0.00

**223 State tax withheld**  
\$ 0.00

**224 State tax withheld**  
\$ 0.00

**225 State tax withheld**  
\$ 0.00

**226 State tax withheld**  
\$ 0.00

**227 State tax withheld**  
\$ 0.00

**228 State tax withheld**  
\$ 0.00

**229 State tax withheld**  
\$ 0.00

**230 State tax withheld**  
\$ 0.00

**231 State tax withheld**  
\$ 0.00

**232 State tax withheld**  
\$ 0.00

**233 State tax withheld**  
\$ 0.00

**234 State tax withheld**  
\$ 0.00

**235 State tax withheld**  
\$ 0.00

**236 State tax withheld**  
\$ 0.00

**237 State tax withheld**  
\$ 0.00

**238 State tax withheld**  
\$ 0.00

**239 State tax withheld**  
\$ 0.00

**240 State tax withheld**  
\$ 0.00

**241 State tax withheld**  
\$ 0.00

**242 State tax withheld**  
\$ 0.00

**243 State tax withheld**  
\$ 0.00

**244 State tax withheld**  
\$ 0.00

**245 State tax withheld**  
\$ 0.00

**246 State tax withheld**  
\$ 0.00

**247 State tax withheld**  
\$ 0.00

**248 State tax withheld**  
\$ 0.00

**249 State tax withheld**  
\$ 0.00

**250 State tax withheld**  
\$ 0.00

**251 State tax withheld**  
\$ 0.00

**252 State tax withheld**  
\$ 0.00

**253 State tax withheld**  
\$ 0.00

**254 State tax withheld**  
\$ 0.00

**255 State tax withheld**  
\$ 0.00

**256 State tax withheld**  
\$ 0.00

**257 State tax withheld**  
\$ 0.00

**258 State tax withheld**  
\$ 0.00

**259 State tax withheld**  
\$ 0.00

**260 State tax withheld**  
\$ 0.00

**261 State tax withheld**  
\$ 0.00

**262 State tax withheld**  
\$ 0.00

**263 State tax withheld**  
\$ 0.00

**264 State tax withheld**  
\$ 0.00

**265 State tax withheld**  
\$ 0.00

**266 State tax withheld**  
\$ 0.00

**267 State tax withheld**  
\$ 0.00

**268 State tax withheld**  
\$ 0.00

**269 State tax withheld**  
\$ 0.00

**270 State tax withheld**  
\$ 0.00

**271 State tax withheld**  
\$ 0.00

**272 State tax withheld**  
\$ 0.00

**273 State tax withheld**  
\$ 0.00

**274 State tax withheld**  
\$ 0.00

**275 State tax withheld**  
\$ 0.00

**276 State tax withheld**  
\$ 0.00

**277 State tax withheld**  
\$ 0.00

**278 State tax withheld**  
\$ 0.00

**279 State tax withheld**  
\$ 0.00

**280 State tax withheld**  
\$ 0.00

**281 State tax withheld**  
\$ 0.00

**282 State tax withheld**  
\$ 0.00</

# Reflections

During my time on this project, my product manager changed. I was originally partnered with someone who was familiar with the business, and then a new PM was brought into the company and this was one of their first projects.

I learned how to build trust with them quickly to keep the project moving.

**01** Ideas should be visualized at the right fidelity. When I was working on outlining the user flow, I used flow diagrams to show my PM what our options were and we were able to quickly determine what the best way to introduce import was.

**02** The success of your experiment, or project is dependent on more than just the design. It also depends on the system that you introduce it within and behaviors of people who use your products.