Pro Quoting

UX Research Case Study #1

Company Background

About The Home Depot

- The Home Depot (est. 1978) is the largest home improvement retailer in the U.S.

- The company serves roughly three types of customers: Do-It-Yourself (DIY), Do-It-For-Me (DIFM), and Pros.

- Pros make up ~70% of sales for the company, but only ~30% of the total customer base, so the company invests a lot into the online Pro experience.

Case Study Background

Business Context

Teams across Home Depot began ramping up quote related projects online, but there were significant gaps in knowledge of what Pro quoting looks like.

To assist Home Depot in supporting our Pro customers with their quoting needs, research needed to understand how they were currently experiencing getting quotes.

Case Study Background

Two separate research studies were conducted to achieve this large research objective.

- One study focused on understanding the holistic journey of quoting (agnostic of company) which was led by a senior researcher.

- **The study I led was focused specifically on understanding the Home Depot experience of quoting for Pros.**

Case Study Objective

Research Objective
Understand the current experience of how Pros go about getting and finalized quotes for their projects from the Home Depot and how their experience with in-store associates facilitates this process.

Study Questions
- What is the communication like between Pros and Home Depot associates throughout the end-to-end quotes journey?
- What is the experience like to track and send information during this journey?
- Why do Pros create a quote online vs in-store?

Pros working with THD associates at the Pro Desk.

Study Design

Methodology
Interviews + Survey

Reasoning
Interviews gave us a sense of what Pros *think and feel* about the Home Depot's quoting experience and what tools and communication processes they use.

The survey gives us *quantitative* insights around *how and where* Pros are achieving their quoting needs.

1 hour Remote
Interviews (n=7)

15 question
*survey (n=213)*

Sample Questions

Interview Questions

- *When it comes specifically to quotes and quoting—who typically is involved with that in your organization?*
- *Overall, what's your experience been like getting quotes with THD?*
- *Can you walk me through what it's like to go through the quoting process with THD?*
- *What is the experience like sending over your list of materials?*

Survey Questions

- *How do you create your quotes with The Home Depot?*
- *When starting the quoting process online, what format is your list of materials in when you share it with the Pro Desk?*

In addition to the guide, we had customers look at today's quoting capability in the shopping cart page.
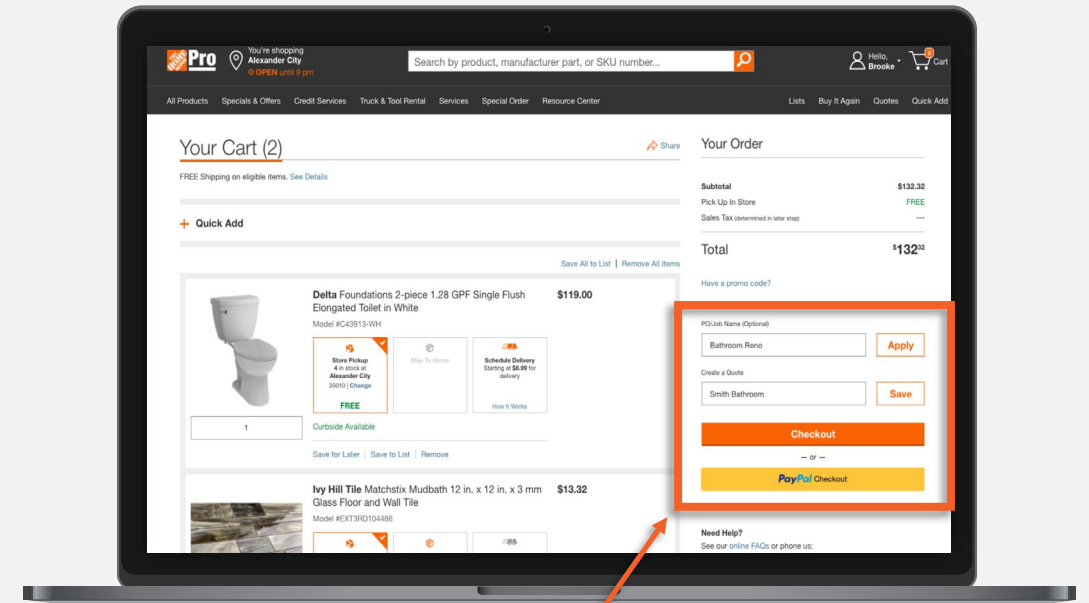
Targeting the Audience

Screener Criteria
- Pros who recently got a quote from The Home Depot within 3 months
- Renovators/Remodelers
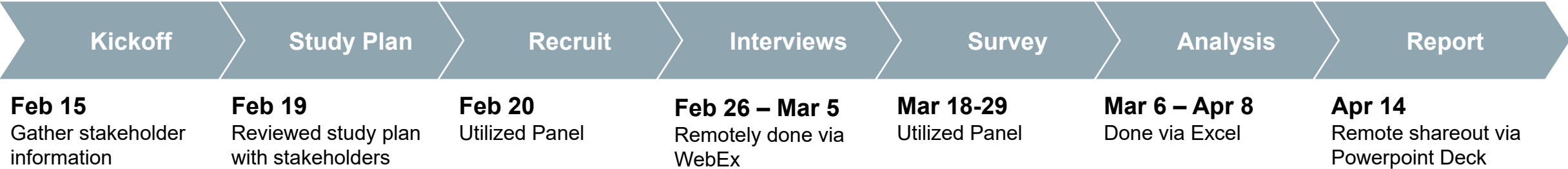- Property Investor

Recruitment Process

For the interviews, I recruited the Pros from the research team's internal panel platform. The platform was also used to launch the survey.

My Role + Timeline

My Role: I led this research project from beginning to end in Q2 2021 with the exception of the contribution of a senior UX researcher's questions for the survey.

Timeline (2 months):

Kickoff	Study Plan	Recruit	Interviews	Survey	Analysis	Report
Feb 15 Gather stakeholder information	**Feb 19** Reviewed study plan with stakeholders	**Feb 20** Utilized Panel	**Feb 26 – Mar 5** Remotely done via WebEx	**Mar 18-29** Utilized Panel	**Mar 6 – Apr 8** Done via Excel	**Apr 14** Remote shareout via Powerpoint Deck

Cross-Functional Partners (Stakeholders)

Enterprise Pro
Team

Interconnected Experience (.com)
Team

Quote Center
Team

Responsible for associate facing products that support building quotes for Pro.

- 1 Product Managers
- 1 Lead UX Designer

Responsible for consumer facing experience on the Home Depot website.

- 2 Product Managers
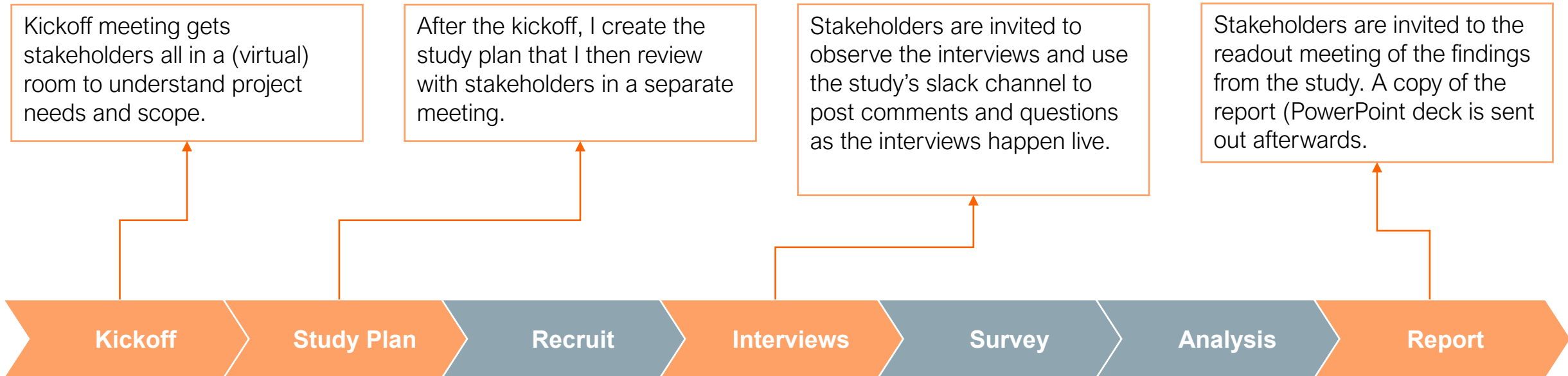- 1 Sr UX Researcher
- 1 Sr UX Designer
- 1 Sr Analyst

Responsible for system that creates visibility into special order catalog for quote building.

- 1 Head of UX

Stakeholder Engagement Touchpoints

Kickoff meeting gets stakeholders all in a (virtual) room to understand project needs and scope.

After the kickoff, I create the study plan that I then review with stakeholders in a separate meeting.

Stakeholders are invited to observe the interviews and use the study's slack channel to post comments and questions as the interviews happen live.

Stakeholders are invited to the readout meeting of the findings from the study. A copy of the report (PowerPoint deck is sent out afterwards.

Kickoff › **Study Plan** › **Recruit** › **Interviews** › **Survey** › **Analysis** › **Report**
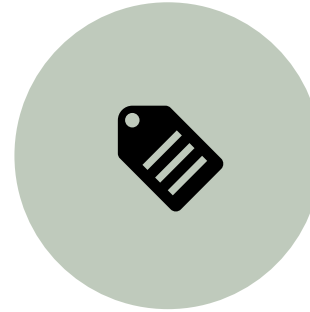
THE HOME DEPOT

Wrap-Up

Top Insights (from the study)

Pros value their **working relationships** with THD associates at the Pro Desk when doing the quoting process.

Pros are using a variety of methods & workarounds to hand over their **list of materials** to The Home Depot Pro Desk.

Pros don't believe they can't get the same **discounted prices** online compared to what they get in-store.

Pros find the prospect of **online quoting exciting** and helpful, but many are **unaware** of today's quoting feature.

Recommendations

- Support the experience of allowing Pros to **start and finish the quoting process** where they please, for example, start the quoting process online and finish it in-store, even supporting it earlier in their project lifecycle.

- Understand the full extent of what the barriers are to Pros using THD's **online lists**, particularly in the context of quotes, so we can **help Pros use** lists to their advantage for quotes.

- Ensure how to make the current and future state of the online quoting tool **salient** to Pros.
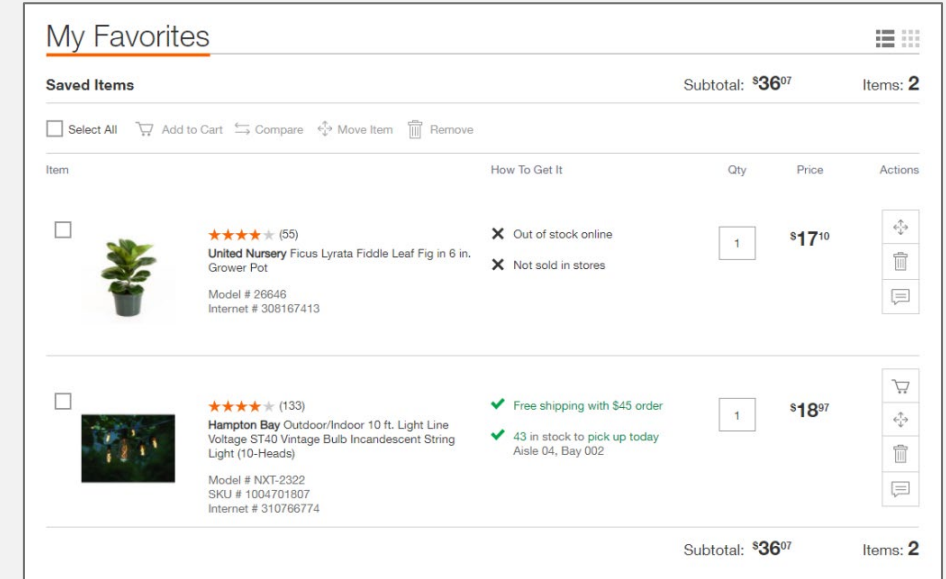
Today's experience of looking at a list in an account.

Resulting Impact

- The Enterprise team **scheduled a workshop** within a week of the readout to kickoff opportunities.

- The team prioritized getting the online **quoting capability to appear earlier** in a Pro customer's shopping journey.

- Research further studied how Pros understand the relationship between **lists and quotes and cart** experiences.

- Currently in development is a new feature that will help **Pros send a list or quote** (that they began online) to a store associate.
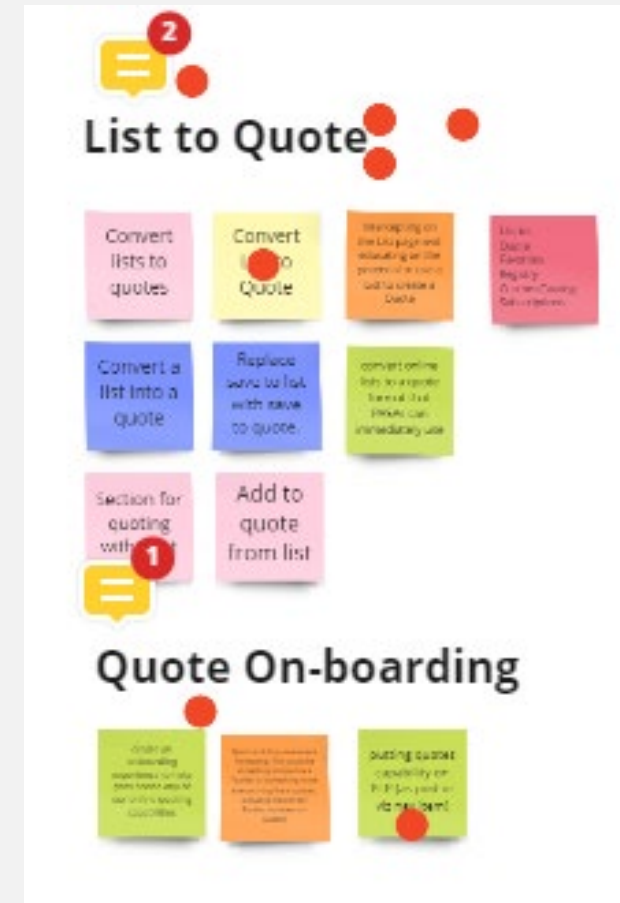
Snapshot of Miro Board that facilitated the prioritization workshop

Reflections

What could have gone better?

- Our recruitment pool consisted of mostly small Pros, so I didn't speak with Pros who worked with assigned PARs (white glove service associates) nor design consultants
- Lots of Pros did not show up (50%), so I decided to scheduled more Pros than needed just in case

Positives

- Collaborating with another researcher
- Working in the Pro space with folks outside of the *.com* community
- Making strategic impact!