

Universal Search Feature for

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Process

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Challenge, Background and Assumptions

- **Challenge:**
 - Define a plan to add universal search to the logged in web experience for PayPal merchants that integrates seamlessly into the app's existing UI. The universal search feature should serve merchants to find options to perform necessary actions.
- **Background:**
 - PayPal is globally popular powerful payment processor that makes accepting payments simple. A merchant account is the business version of PayPal and have more advanced features and different fee structures for business owners.
 - Our goal is to add universal search to the logged in web experience for PayPal merchants. *Universal search feature should help merchants have seamless discovery options to perform the necessary tasks effectively and the feature should integrate seamlessly into PayPal's existing UI.*
- **Assumptions:**
 - **Target Users:**
 - *PayPal's registered merchants*
 - *Both online and in-store merchants.*
 - **Platform consideration:**
 - www.paypal.com – Web application for both Windows and iOS

PayPal for Business Overview

- PayPal offers: No contracts, no monthly fees, and a robust suite of tools for merchants to sell virtually anywhere, anytime.
- PayPal can be implemented as an exclusive means of accepting payments or as a supplemental option for a business. As for subscription plans, PayPal offers three options for web payments:
 - PayPal Checkout (formerly Express Checkout)
 - PayPal Payments Advanced
 - PayPal Payments Pro
- **Pricing:**

PayPal product	Per-transaction rate	Per-transaction fee
Digital payments (invoicing, checkout, pay with Venmo and other commercial transactions)	3.49%.	\$0.49.
Standard credit/debit card payments	2.99%.	\$0.49.
Card present or QR code	2.7%.	No fee.
Advanced credit / debit card	2.59%.	\$0.49.
Payments Advanced	2.89%.	\$0.49.
Payments Pro	2.89%.	\$0.49.

PayPal's Competition:

Competitor	Pricing per transaction
Stripe	2.9% plus 30 cents
Skrill	1.45% plus 50 cents
Google Pay	2.9%
Apple Pay	3%
QuickBooks Payments	2.9% plus 25 cents

PayPal's Competitive Advantage:

- PayPal is easy for both businesses and their customers to use.
- Seamless single click checkout process that helps in higher sales conversions.
- Customized product offering based on the business size and category.
- Highly intelligent business insights, revenue chart, and fraud prevention product offerings

Personas

Mohit Kumar

Age: 28, India

Occupation: Owner of Nutty Affair - A Premium Dry Fruit Store

(www.nuttyaffair.in)

Profile:

Mohit is a millennial entrepreneur, who's comfortable with the internet and online operations. He believes that eCommerce can help his business to reach the global customers. He uses PayPal as online payment platform to manage his global transactions.

Needs:

- PayPal helps in managing his customer transactions, refunds, and monthly/yearly sales reports.
- PayPal offers a seamless experience in issuing refunds and provide insights of amount spent, which is important to maintain a right financial record.

Pain Points:

- It takes multiple steps to find out customer details. I have to go through transactions, or previous order details to find the right customer details.
- To find the exact transaction detail, there is no way to use customer detail and find the transaction details.

Jason Paul

Age: 35, Texas, USA

Occupation: Retail Store Co-Owner

Profile:

Jason handles his family retail store, and it is one of the most famous store in their area and they have 3 stores. With the new trend of online payment, Jason partnered with PayPal to receive online payment and manage the transactions.

Needs:

- PayPal works in accepting payment through credit/debit cards and PayPal wallet. It helps in seamless checkout experience at the store.
- Jason loves the PayPal dashboard where he can easily find details of sales, growth and invoices that helps in tax filing and maintaining financial records

Pain Points:

- Finding the invoice number to process return or refund is a tough task, as there is no option to search the details.

User Interviews

- **Total Participants: 6**
- **Categories of sellers:**
 - eCommerce sellers – 3
 - Retail sellers – 3
- **Questions:**
 - Experience using PayPal? (Time duration and experience)
 - How does PayPal help them in managing payments?
 - How do they find transactions and invoices during refunds and tax filing?
 - How do they search specific details?
 - What steps do they take to get specific customer, transaction or invoice details?
- **POV Statement:**
 - After analyzing all the data from the survey and user interviews. Here are a few of the insights I gathered:

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POV Statement:

- A POV(Point of View) is a meaningful and actionable problem statement. (User + Need + Insight)
- **Insights:**
 - After analyzing all the data from the survey and user interviews. Here are a few of the insights I gathered:
 - Most of the users are not satisfied with the discovery process on PayPal.com. It's confusing for them and difficult to find the information they are looking for.
 - Another issue is with taking combined action on multiple transactions by same customer on different date, as the user (merchant) has to go through the transaction statement multiple times and find the invoice and proceed for next steps.
- POV Statement: **Mohit is a 25-year-old Entrepreneur who uses the PayPal as a partner for his international customer transactions. He needs a great user experience because finding multiple transactions of different dates and customer details becomes difficult and quite confusing.**

Ideate and Define Goals

- Step 1: Ideate by How Might We (HMW)
- Step 2: Differentiate Goals: Business and User Goals
- Step 2: Product Goals

Step 1: Ideate by How Might We (HMW)

- By framing the problem as a How Might We question, we will prepare ourselves for an innovative solution:
 - How might we make the web search experience user friendly?
 - How might we make the search experience simple for the existing users user?
 - How might we help the user to discover/find the right information they want in one click?
 - How might we help the users to help completing their actions by reducing manual efforts.

Step 2: Differentiate Goals: Business and User Goals

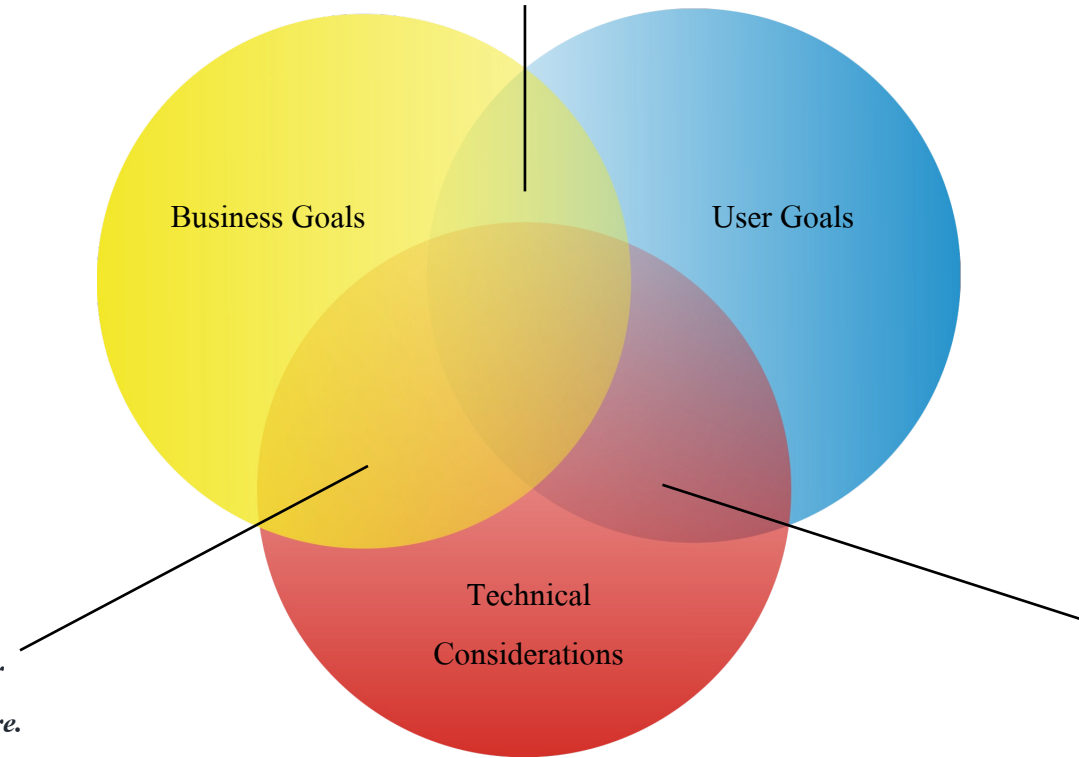
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- *Feature that gives users and option to find information in one click.*
- *User can perform search activity and find details related to Customer, Transactions and Invoices by using one search.*
- *Feature that helps users to reduce manual efforts to find information.*

Business Goals

- Design and integrate the universal search feature that embeds within the current PayPal web application.
- Feature must be embedded well and run smoothly with the rest of the application
- Maintain PayPal's branding and design, so a seamless integration into the current app is possible.

Maintain constant UI design and familiar user experience to integrate universal search feature.



User Goals

- Discover the required information related to customers, transactions, and invoices using the search feature.
- Perform the desired actions using search features and go through less manual efforts to find information

A design that clearly shows users options to find their desired information.

Technical Considerations

- Keep user experience and UI design familiar to the users
- A seamless, smooth and bug-free recommendation feature within PayPal.com platform

Defining Goals and Priorities

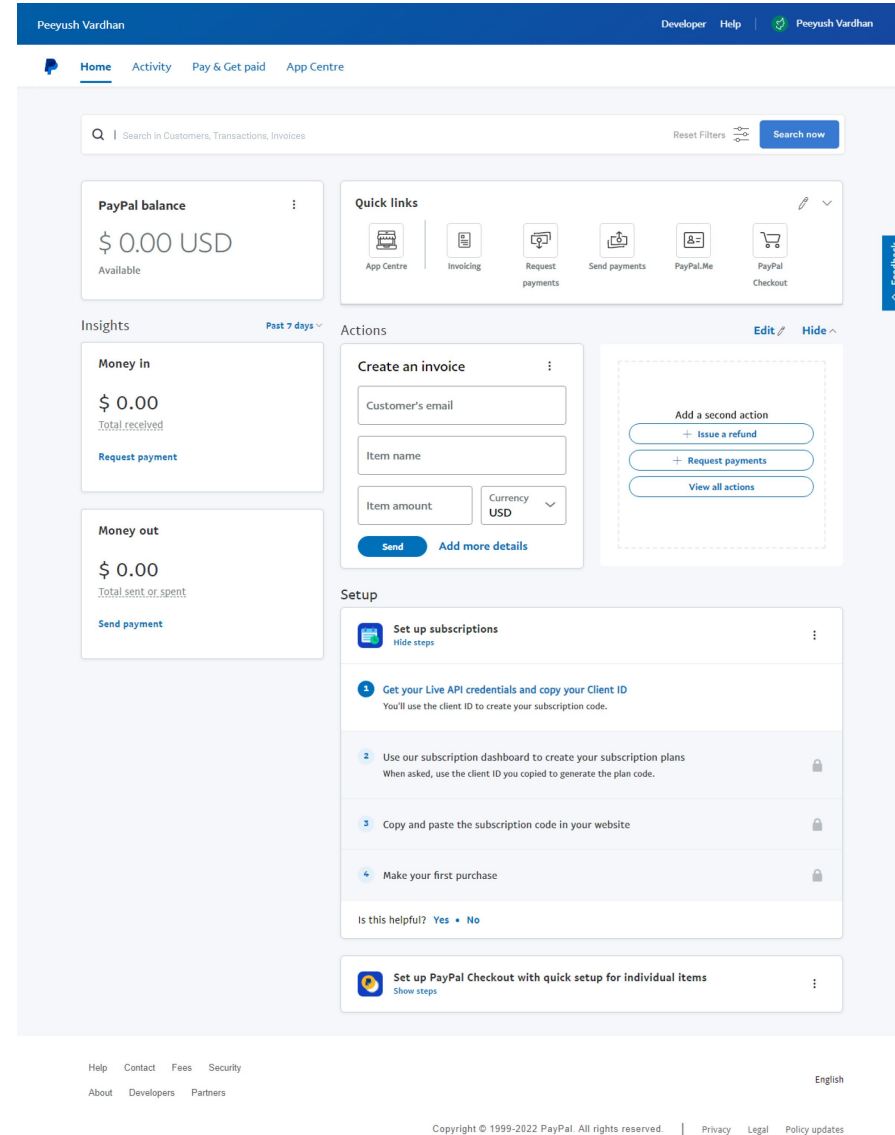
Metrics: RICE (Reach, Impact, Confidence, and Effort.)

Priority Level	Priority 1	Priority 2	Priority 3
Feature	Implementation of One Search	Enable search preferences based on the user need	Search Dashboards
Goal	<ul style="list-style-type: none">- Implement the unified search experience for PayPal app, where users will be able to find all desired information using one search tab.- User will be able to search information of the following categories: Customer Details, Transactions, and Invoices.	<ul style="list-style-type: none">- Based on the search results, users will be allowed to segment the result based on their preference.- Search result segmentation will allow users to take necessary action based on the need of the hour and help in exporting desired data.	<ul style="list-style-type: none">- Users can avail the search result segmentation based on the result categories and perform multiple action on the same landing page.- Users will be able to view category specific search dashboard, which can be personalized using filters

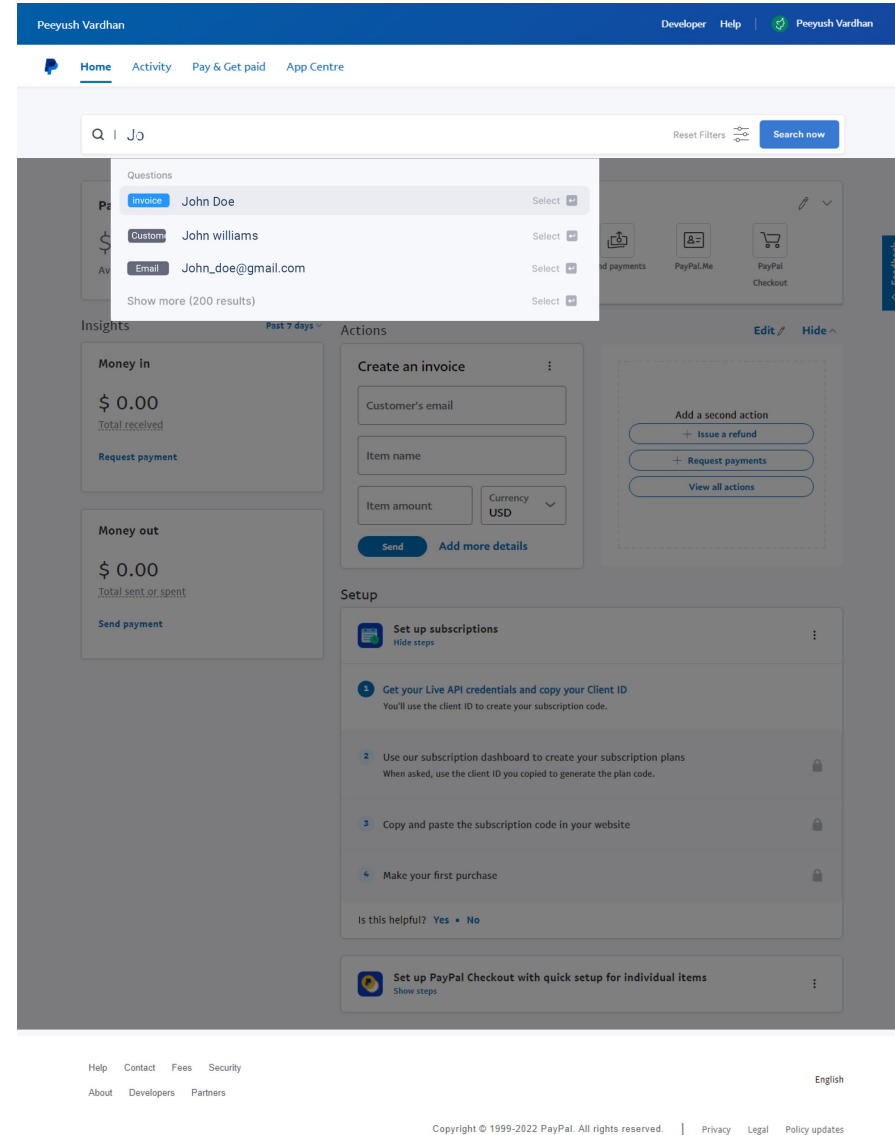
Feature 1: Implementation of One Search

- **User Story 1:**
 - As a user, I want to search the information related to my customers, transactions and invoices so that I can easily find the information and take actions as refund, tax filing and communication to customers.
 - Search feature should allow the following:
 - Allow user to view their customer information. Customer information will be the following:
 - Customer Name
 - Customer Email
 - Customer Phone Number
 - Allow user to view the transactions of a specific customers
 - Allow user to view the invoices of the transactions
- **User Story 2:**
 - As a user, I want to see the categories of my search result so that I can differentiate between the multiple results and take action according to the need.

Prototype: One Search Feature



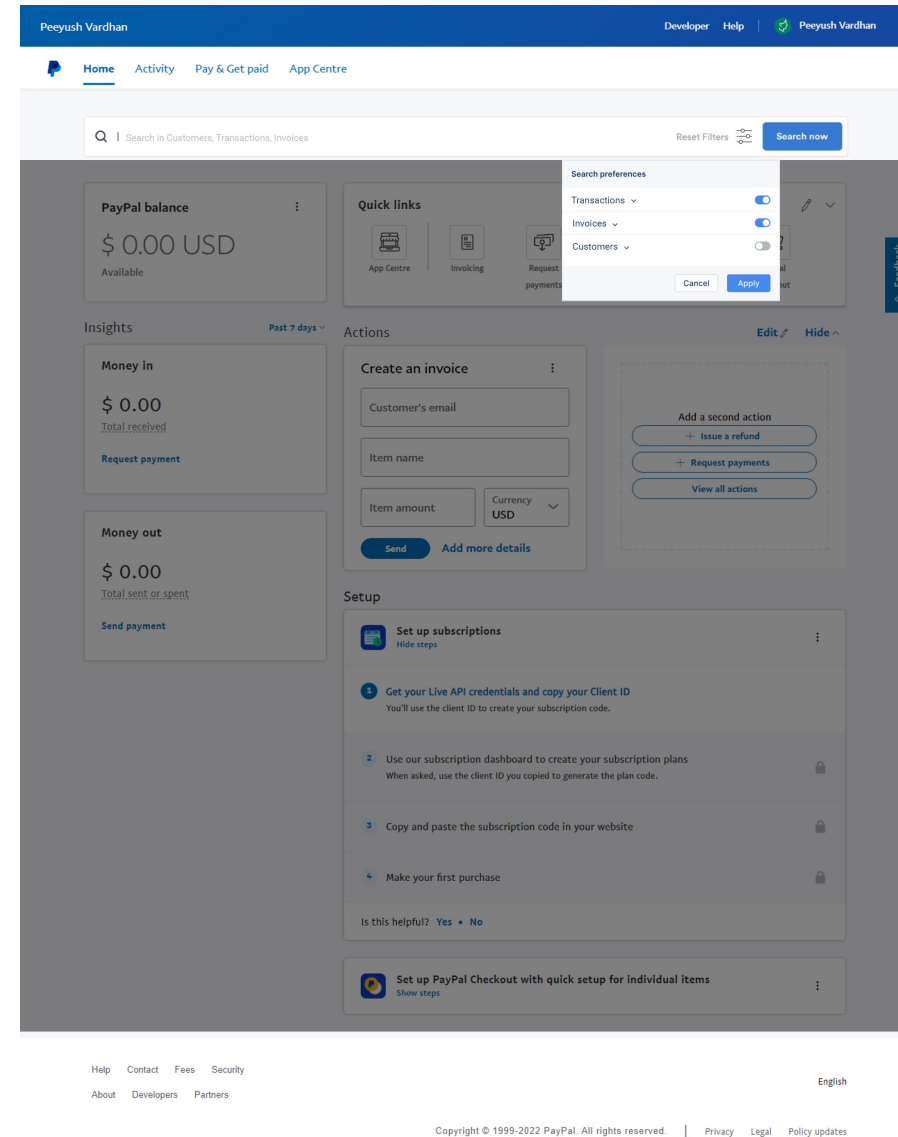
Prototype: Search Result Format



Feature 2: Enable search preferences based on the user need

- **User Story:**
 - As a user, I want to filter the search results into the categories of customers, transactions and invoices so that I can visualize specifically required results and perform necessary tasks concerning the need.
 - Search filter should allow the following:
 - Allow user to view filter transactions. Transactions could be filtered into sub-categories:
 - Completed Transactions
 - Pending Transactions
 - Allow user to view filter Invoices.
 - Allow user to view the customers. Customers could be filtered into sub-categories:
 - Customer Name
 - Customer Email
 - Customer Phone

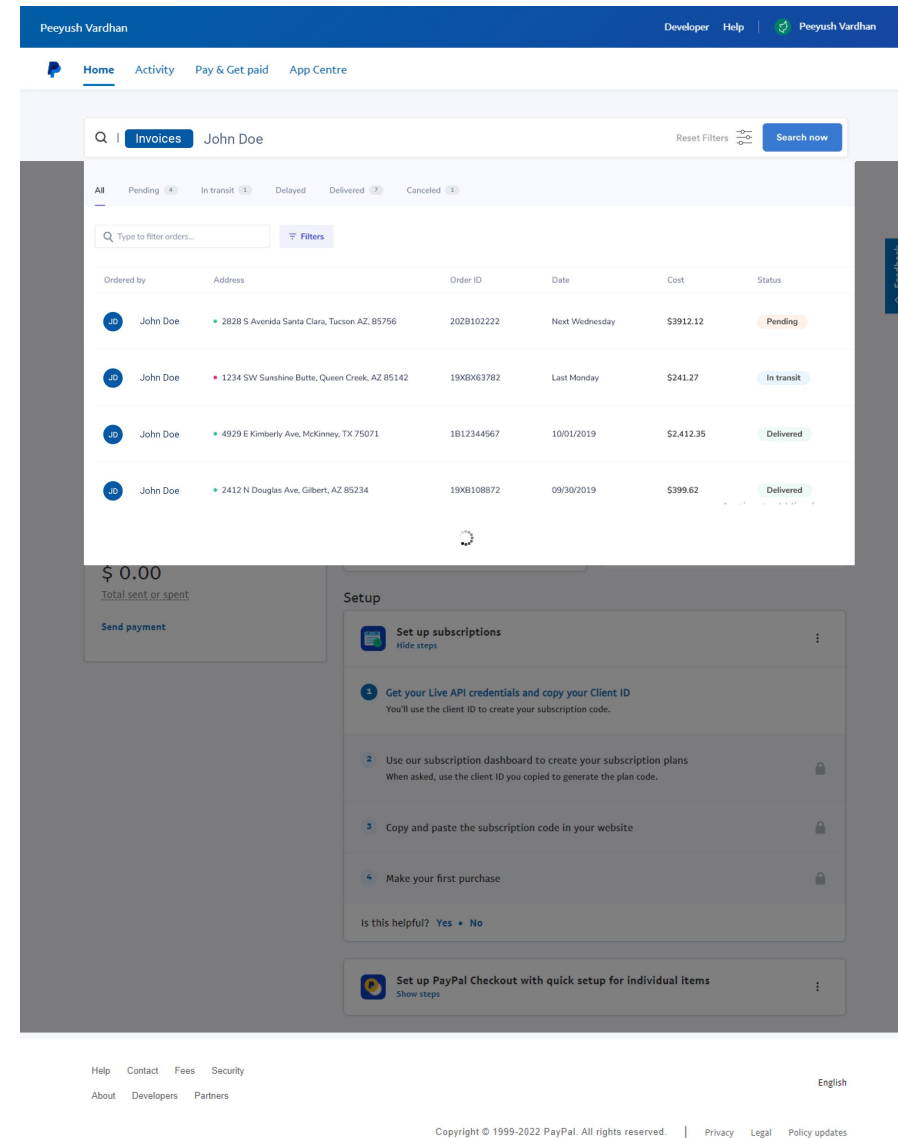
Prototype: Search Result Filter



Feature 3: Search Dashboard

- **User Story:**
 - As a user, I want to take combined action on multiple transactions and invoices so that I can effectively perform larger tasks in short time span, and export necessary reports related to a customer or purchase for external.
 - Search Dashboard should allow the following:
 - Allow user to select category of the search and keywords of the search together in the search tab.
 - Allow user to sort the search results by date and customer name.
 - Allow user to view the following details on the dashboard page
 - Customer Name, Order Id, and Address
 - Purchase date
 - Order cost
 - Transaction status: Paid, Refunded, In progress (Refund)

Prototype: Search Dashboard



Success Metrics:

Focus Metrics: *AAR [Activation, Adoption and Retention]*

Metrics	Activation	Adoption	Retention
Description	Are users acting we want them to?	How fast are users to adopt universal search feature?	Are our activated users continuing to engage with universal search?
How to measure?	<ul style="list-style-type: none">- Number of Search in a day and month- Daily Active Users (DAU)- Monthly Active Users (MAU)	<ul style="list-style-type: none">- Average time spent by existing users- Average time spent by new users	<ul style="list-style-type: none">- No. of returning users- Positive review counts

Questions?

Thank you!