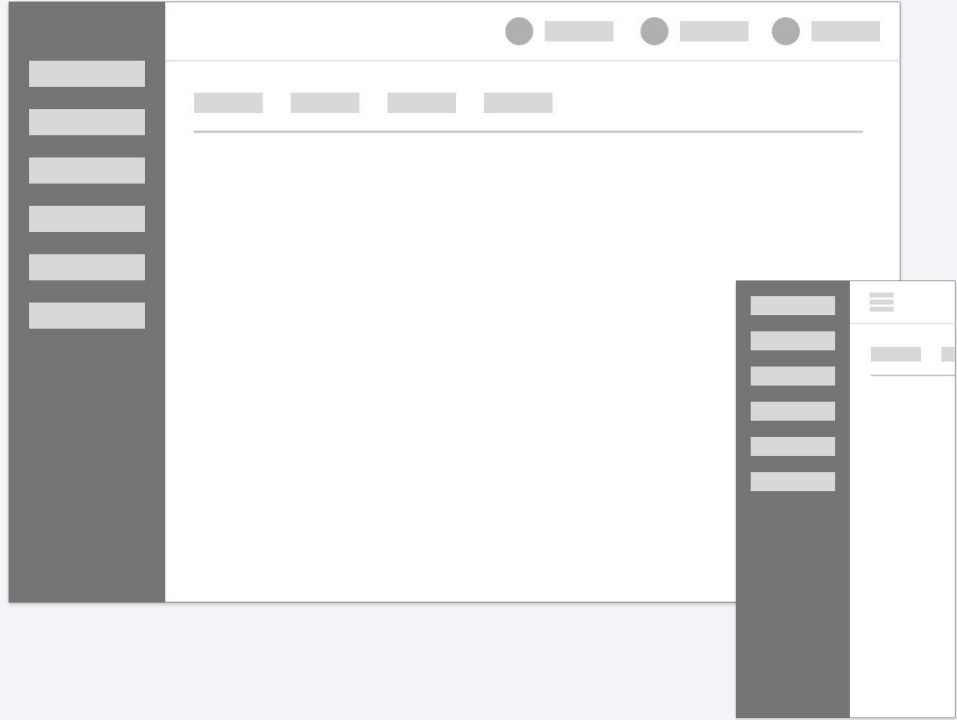




QuickBooks Online Navigation Guidelines

Kylie Tuosto, Shailesh Shilwant, Katja Spreckelmeyer,
Jen Hong, Joe Preston

Navigation Overview



Navigation Overview

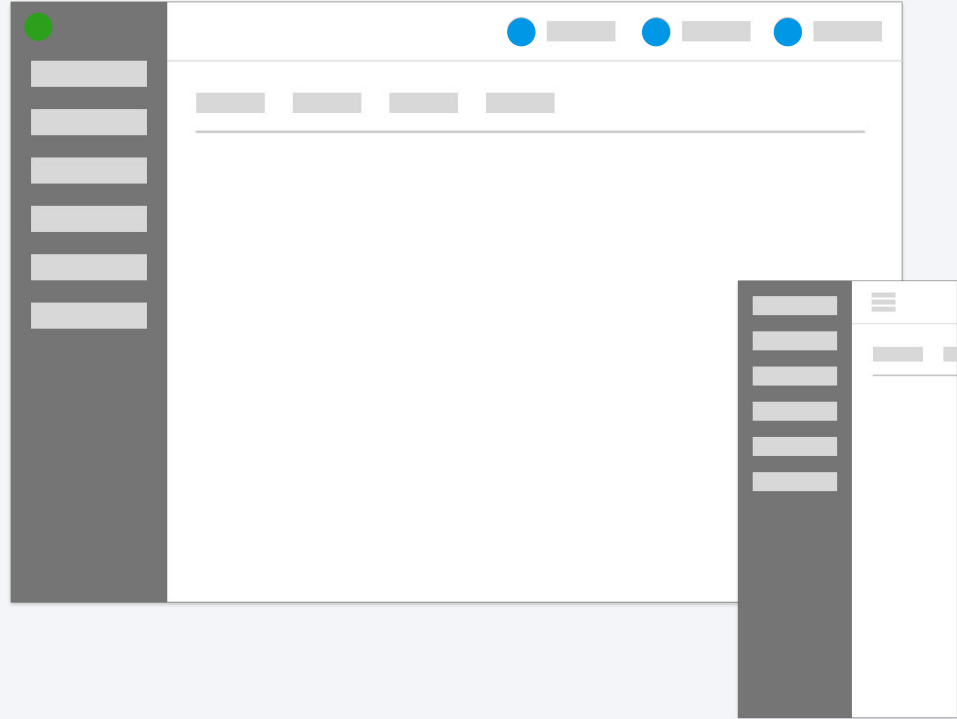
QBO Web Navigation allows users access to all parts of the product. The navigation consists of two primary components.

● Left Nav

Serves as center of access for customer-centric "jobs" or capabilities, dependent upon roles and permissions
(eg. Dashboard, Banking, Expenses, Projects)

● Global Header

Serves as center of access for universal capabilities (eg. Accounts, Settings, Help, Search)



Left Nav Goals

Enable users to **discover**,
learn and **quickly access** the
product capabilities (“jobs”)
that relate to their workflow
and permissions

Jobs to be Done

The higher purpose for which customers buy products, services or solutions. It is not a specific product, service or solution.

● Principles for Left Nav Centers

1. Provide **discovery of benefits** to all users, dependent upon access and permissions
2. All nav centers should be self-contained in completion the “job to be done”
3. **Reduce choices** and represent a group of related capabilities or “jobs” as a center
4. Nav center names must be **simple and aid discoverability** and align closely with the promise made in marketing (“promise to payoff”)
5. Centers grow in additive fashion (“unlock”) vs. “reconfigure” requiring users to re-learn
6. Balance between discoverability and “**paradox of choice**”(ex. more choices = less engagement)

● Guidelines for Left Nav Centers

- Use customer understood language
- Aim for single word centers and items (no line-wraps)
- Use text-only name format
- Clearly delineate center, or capabilities/jobs, from each other with unique names
- Limit use of “NEW” badge to centers showcasing new capabilities or services + time restriction
- Paradity is required for naming for nav centers in web and native mobile apps
- Add event tracking, use taxonomy 2.0
- In case of an experiment, provide learning plan and success metrics, change management/comms.

● What is a Job?

A **“Job to be Done”** is not a product, service, or a specific solution; it's **the higher purpose** for which customers buy products, services, and solutions.

“Jobs to Be Done” can contain multiple jobs and tasks within them, that act in relation to achieving the purpose (“completing the job”)

● Questions to consider for Left Nav

- Is this a “job” we showcase as a main product, service or capability in our front-doors?
- Is this capability closely associated with a pre-existing “job” or nav center in QB ecosystem?
- Is this the simplest and most commonly understood name?
- Will there be an equivalent nav item in QuickBooks Mobile?
- Does this contain multiple jobs or capabilities within it? How many tasks or sub-items are contained within?
- Does this nav center proposed, have dependencies on other nav centers throughout the product?
- Does this conflict in any way with the customer perceived “job to be done” naming?
- Is this moving or renaming an existing nav center (aka “moving cheese”)?
- Does the additional nav center, add to paradox of choice, and have potential to cause confusion or do harm to related jobs/tasks or another key business outcome?
- What stage of maturity is this capability (ex. MVP, global-ready, beta)

Global Header Goals

Enables **all users** to access universal and persistent utilities they expect in applications such as **navigate, search, find help, alerts** and **access accounts** and **settings**

● Principles for Global Header

Convention Wins

Header access points represent **common customer expected utilities** across applications

Be Clear

Always optimize the display of access points for **usability and accessibility**

Less is More

Focus on extremely **limited total number** of access points displayed at anytime (ex. 3-5)

Guidelines for Header

1. No access points that represent “jobs”, features or capabilities that would promised to customers as additive benefits or services
2. Screen size permitting, access point must include icon symbol and text identifier
3. Use only simple and standard naming and graphics for all access points (ex.no custom branding)
4. Must prominently display product brand identifiers (ex. logo and name)

Appendix

FROM
FY17-19

Left Nav Centers	Sub Nav
Dashboard	
Banking	Banking Bank rules
Invoicing/Sales	All Sales Invoices Customers Products and services
Expenses	Expenses Vendors
Workers	Employees Contractors
Reports	
Taxes	Sales Tax Payroll Tax
Accounting	Chart of accounts Reconcile
My Accountant	
Apps	
Projects	
Capital	

Current

TO
FY20+

New Option 1											
New Option 1 - "Contact" is pulled out as a separate center. My Accountant is available for all products											
All Accounting Payroll Payments Time Payroll + Payments Payroll + Time Payments + Time Payroll + Accounting											
Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers
Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard
Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers
Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing
Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses
Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers
Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports
Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes
My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant
Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps
New Option 2 - "Contact" is pulled out as a separate center. My Accountant is available for all products											
All Accounting Payroll Payments Time Payroll + Payments Payroll + Time Payments + Time Payroll + Accounting											
Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers
Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard
Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers
Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing
Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses
Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers
Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports
Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes
My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant
Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps
New Option 3 - Consolidates (Data-to) center + Mortgage on the main left nav center											
All Accounting Payroll Payments Time Payroll + Payments Payroll + Time Payments + Time Payroll + Accounting											
Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers	Left Nav Centers
Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard	Dashboard
Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers	Customers
Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing	Invoicing
Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses	Expenses
Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers	Workers
Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports	Reports
Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes	Taxes
My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant	My Accountant
Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps	Apps

[Link to Test Results](#)

[Link to Mural](#)

Notes from OnDemand (Sept 10, 2018)

High level guidance from Leslie:

- Bias towards NTTF users and first time use when making decisions.

- Define clear success metrics for NTTF and Existing users

Open Questions for the tiger team to deep dive on:

- How might we test the hypothesis of personalization benefit compare to the challenges in Accountant and Care experience?

- How does personalization by business type and "intent" work with the Front door strategy?

- How would we handle navigation between Web and mobile? is it consistent, if not, how do we make these decisions. May need to update the guiding principles to help with this.

- How do we define the order of the left nav centers? Unlock sequence may drive this decision but need to define.

- How might we reframe centers such as Reports and taxes to not make them scary or overwhelming for new users?

- Have we looked into other navigational models than the left nav? Example - Google App Switcher.

- Terminology and label needs to be defined. specially for the "Income/Money-in" center.

Next steps:

- Assemble the "NAVengers": Get a tiger team in place. Research, Content, PM, Care + Job/product representatives

- Create a Learning Plan: How would we learn, iterate and validate the proposals with Qual + Quant.

- Define timeframe that helps drive decisions and make progres

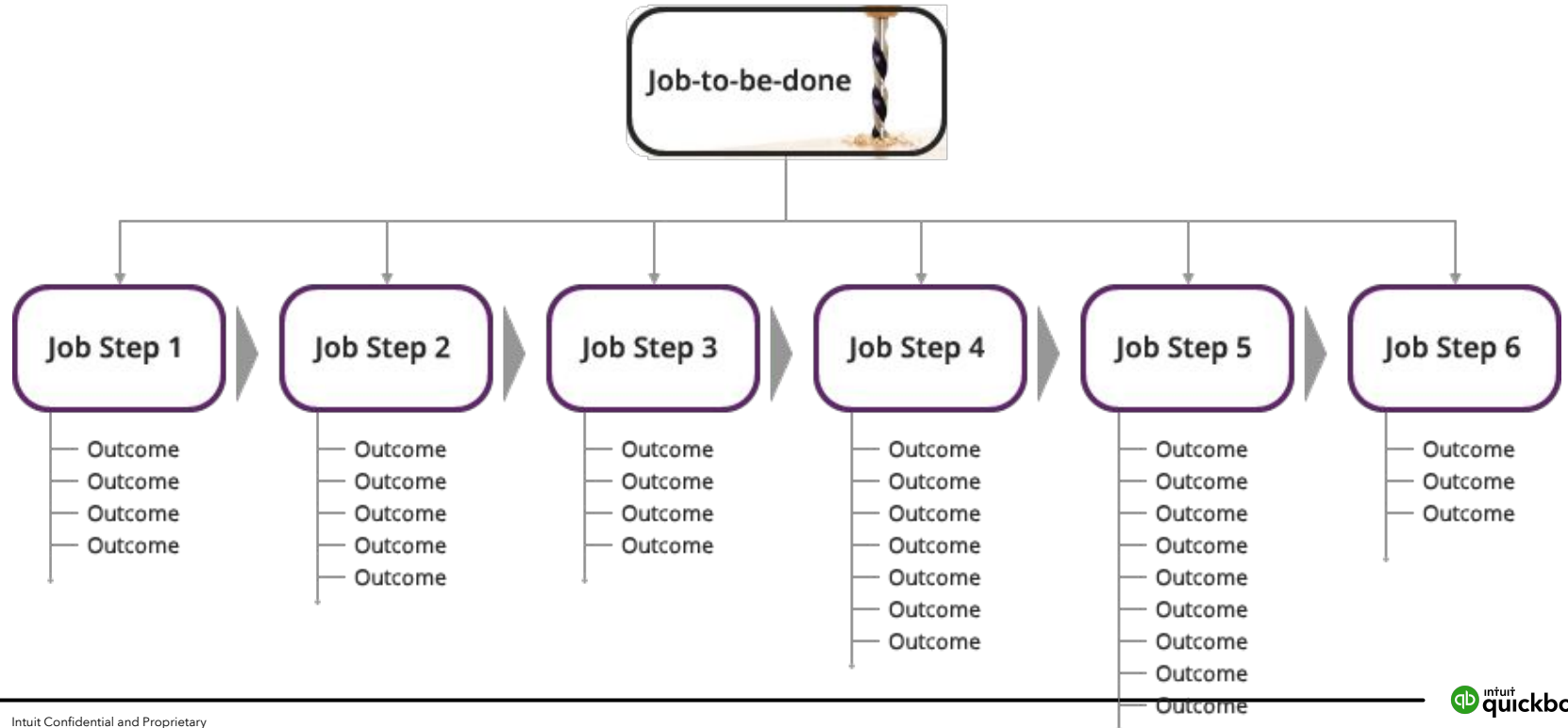
Ideal State

FPO: Future state of navigation is no navigation. Interaction with QB should feel like a seamless conversation with a personal assistant.

But for now, navigation serves as the primary interaction model with QB.

What is a “job to be done”

The Jobs-to-be-Done Need Hierarchy



OLD - Principles for Left Nav Centers

1. **Left Nav Center provides benefit to all users and does not *require* an additional purchase to be useful (i.e. acts as primarily IPD).**

Example: there are multiple jobs that QBO users do in the Employees Center even without Payroll. Obviously, they get more benefit when they also use QBOP/FSP, and we take the opportunity to gently inform them of that potential benefit

2. **Center is at a "Job" level and not at a "task" level.**

Example: Manage and pay workers vs. Pay 1099 contractors

3. **Filtered views must be at the sub-nav level (not top nav level).**

Example: Employees is a filtered list of "All workers"

4. **Naming is primarily driven to aid in discoverability but aligns closely with the promise we made in marketing (Promise to Payoff).**

5. **Center is self sufficient in getting a job done without users having to jump around in multiple centers**

Note: as an example, this does not mean that Centers can't contain insights because there's a Reports tab. But those insights should be contextual and aligned with the rest of the product experience.

6. **Centers grow with you in an additive fashion (Unlock) vs "reconfigure" itself requiring users to relearn**

7. **Balance between discoverability and paradox of choice**

We're already at 10+, likely growing to 11-12 in the near future. In addition to creating paradox of choice and inability to find expected functionality, the nav will scroll for small screen sizes, creating a suboptimal experience.

Should my feature/product have a left nav center?

1. Does my feature/product fit the “job” description?
2. Is my feature/product part of another “Job”?
3. Does my feature/product provide benefit to the users right out of the box (without having to buy or opt into something)?
4. Has the user expressed (somewhat) explicit interest in using the feature/product?
5. Is my feature/product an MVP? Release in all regions? Ready to scale?

Current QBO Left Nav Information Architecture

Left Nav Centers

Sub Nav

Dashboard

Banking

Banking | Bank rules

Invoicing/Sales

All Sales | Invoices | Customers | Products and services

Expenses

Expenses | Vendors

Workers

Employees | Contractors

Reports

Taxes

Sales Tax | Payroll Tax

Accounting

Chart of accounts | Reconcile

My Accountant

Apps

Projects

Capital