



Customer Success OIHS Vision

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Current State

“

Look, I'm not an accountant, I am a small business owner trying to get through the accounting with as little time and effort as possible.

— scottpoliseno on usertesting.com



Customers are experts in their businesses, not accounting.
Customers need help completing basic tasks in QuickBooks
and often can't find the help they need.



A Day in the Life: Trouble Reconciling

Many customers don't know about IPH* so they go to Google.

The screenshot shows the QuickBooks Online interface with the title bar "Orchids R Us Payroll". The left sidebar has categories: Dashboard, Banking, Sales, Expenses, Workers, Reports, Taxes, Accounting (selected), My Accountant, Apps, and Print W-2s. The main content area is titled "Chart of Accounts" with a sub-header "All Lists". It features a search bar "Filter by name" and a message box: "Need help with your chart of accounts? Connect with an accountant. [Invite yours.](#) | [Find one](#)". A table lists account details:

NAME	TYPE ▲	DETAIL TYPE	QUICKBOOKS BALANCE	BANK BALANCE	ACTION
Cash on hand	Bank	Cash on hand	-2,500.00		View register ▾
Checking	Bank	Checking	14,034.39		View register ▾
Accounts Receivable (A/R)	Accounts receivable (A/R)	Accounts Receivable (A/R)	1,500.00		View register ▾
Inventory Asset	Other Current Assets	Inventory	0.00		View register ▾
Uncategorized Asset	Other Current Assets	Other Current Assets	0.00		View register ▾
Undeposited Funds	Other Current Assets	Undeposited Funds	0.00		View register ▾
Accounts Payable (A/P)	Accounts payable (A/P)	Accounts Payable (A/P)	0.00		View register ▾
Opening Balance Equity	Equity	Opening Balance Equity	0.00		View register ▾
Owner's Investment	Equity	Owner's Equity	20,000.00		View register ▾
Owner's Pay & Personal Expenses	Equity	Owner's Equity	0.00		View register ▾
Retained Earnings	Equity	Retained Earnings			Run report ▾

*Efforts in flight to improve this

A Day in the Life: Google Search

The first result is a QuickBooks Pro 2016 video tutorial produced by TeachUComp, Inc.*

The screenshot shows a Google search results page with the query "how do i reconcile in quickbooks". The top navigation bar includes the Google logo, a search bar with the query, a microphone icon, a magnifying glass icon, and user profile icons. Below the search bar are links for All, Videos, News, Shopping, Images, More, Settings, and Tools. A message indicates "About 1,020,000 results (0.50 seconds)". The main search result is a video thumbnail from YouTube titled "QuickBooks Pro 2016 Tutorial Reconciling Accounts Intuit Training ...". The thumbnail image shows the QuickBooks software interface with a reconciliation window open. Below the thumbnail is a blue bar labeled "Suggested clip · 81 seconds". The video's URL is <https://www.youtube.com/watch?v=c03ZhuMHfNc>. At the bottom of the result card are links for "About this result" and "Feedback". A "People also ask" section is visible at the bottom of the page.

*Efforts in flight to improve this

A Day in the Life: Tutorials

The customer finally gets their answer from the second link on Google.

Our tutorials aren't maintained* and aren't connected to the rest of help*.

*Efforts in flight to improve this

The screenshot shows a web browser displaying the [intuit quickbooks](#) website. The main content area features a video player for a tutorial titled "How to Reconcile Your Accounts in QuickBooks...". The video thumbnail shows a clock and the text "Minutes". Below the video, a description reads: "Reconciling accounts can be intimidating. This video will help make the task more reasonable." A green button labeled "Try it in QuickBooks Now" is visible. To the right, a sidebar titled "More tutorials" lists "Small Business Webinars", "Training Events", and "Accountants", each with a corresponding video thumbnail.

Insights

70%

Customers want to self help but they can't find the right content.

30%

Customers are using in-product help

40%

QBO cases are direct calls

Help Engagement Landscape

30% Article Views
from in-product

The dashboard displays various financial reports including Profit & Loss, Expenses, Invoices, and Sales. A central search bar allows users to search for questions or topics.

OIHS Help Panel - Authenticated

70% Article Views
from out-of-product

This page provides two ways to get help: 1) Through a list of company setup and import-related articles, and 2) By connecting with a QuickBooks expert via phone or message. It features a "Contact us" button and a "Spread the word" section.

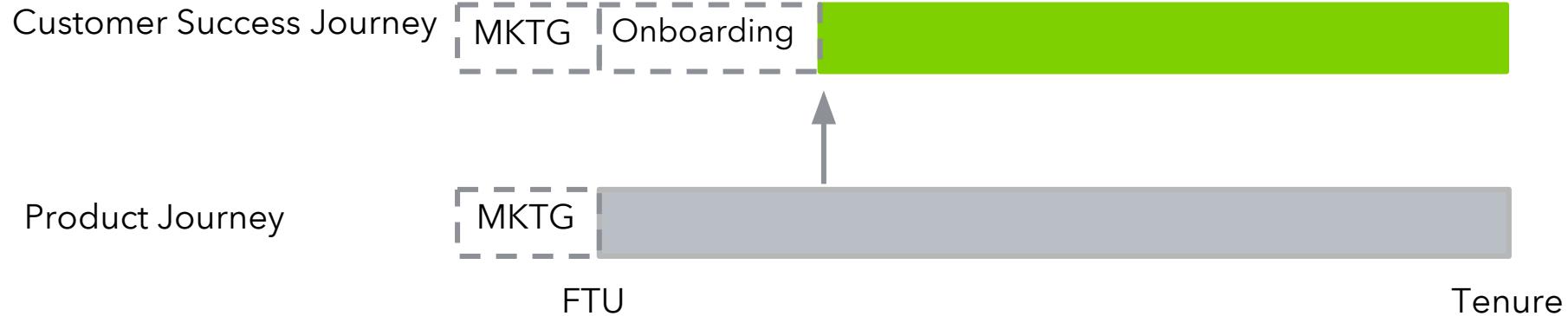
Contact Us - Unauthenticated

The community page includes a search bar, a green header with the title "Welcome to the QuickBooks Community", and sections for "Get help with QuickBooks" (QuickBooks help articles, Q&A, and starting with QuickBooks), and "Featured discussions".

Community - Auth & Unauth

Product “vs” Customer Success

Customer Success lives separately from product flows today.



Source: placeholder for data source here, 2018.

Current State Summary

- Lacking an ecosystem mindset
- A customer's data doesn't always travel with them
- Help is primarily reactive



- **Ideal State**

Vision statement

A help experience that integrates so seamlessly with the product experience that customers do not feel stuck when they have a question and do not recognize they are in a “help” situation, but instead feel that they are making progress on their tasks.

FROM

Reactive

- Waiting for customers to ask for help
- Help as an afterthought separate from product
- Help as “how to” only
- “50 first dates”
- Siloed help experiences
- Measured by: contacts

TO

Proactive

- Knowing what the user needs before they ask
- Help integrated into all aspects of the customer experience (onboarding)
- Help also as “task completion”
- Data travels with the customer
- One Help ecosystem
- Measured by: task completion, LTV



FROM

Reactive

TO

Proactive

TO

Predictive

- Waiting for customers to ask for help
- Help as an afterthought separate from product
- Help as “how to” only
- “50 first dates”
- Siloed help experiences
- Measured by: contacts



- Knowing what the user needs before they ask
- Help integrated into all aspects of the customer experience (onboarding)
- Help also as “task completion”
- Data travels with the customer
- One Help ecosystem
- Measured by: task completion, LTV



- ...
- ...
- ...
- ...
- ...
- ...

Customer Success Design Principles

Know me

- Know my business and how I use your product.
- Provide me with contextually relevant content.
- My data travels with me.

Guide me

- Show me and take me, don't just tell me.
- No dead ends.
- Catch me before I fall. Be proactive.

Connect me

- Help me connect with the appropriate level of assistance in the ecosystem.
- Help me grow my business by unlocking the power of millions for the prosperity of one.

Proactive nudges

QB Help System proactively nudges the customer to complete their tasks based on where they left off -OR- start tasks they typically do based on their usage patterns.

The screenshot shows the QuickBooks Online dashboard for the company "Orchids R Us Payroll". The dashboard features several cards providing financial overviews:

- Profit and Loss:** Last month ▾ \$0 NET INCOME FOR NOVEMBER
- Expenses:** Last month ▾ \$0 LAST MONTH (represented by a donut chart)
- Invoices:** LAST 365 DAYS
\$1,500.00 UNPAID
\$1,500.00 OVERDUE
\$0.00 NOT DUE YET
\$0.00 PAID LAST 30 DAYS
- Sales:** Last month ▾ \$0 LAST MONTH

On the right side, there is a sidebar titled "Helpful links" which includes links to "Banking", "Sales", "Expenses", "Workers", "Reports", "Taxes", "Accounting", "My Accountant", "Apps", and "Print W-2s". Below this is a search bar and a "History" section showing a list of recent items.

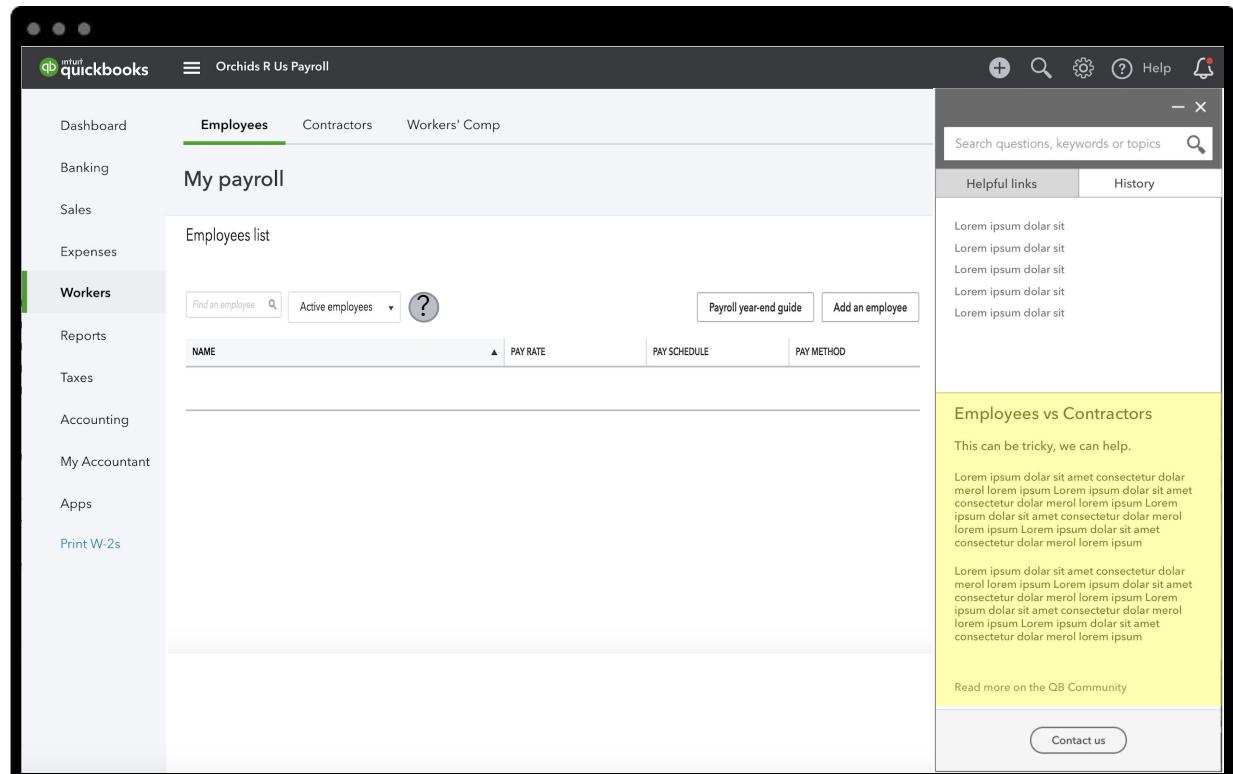
A large yellow box on the right contains several "nudges":

- Pick up tasks where you left off
- Invoice for Karen Thomas
- Invoice for Acme Supply Inc.
- Profit and Loss reporting
- See more...
- To do
- Time to run payroll
- Start
- Contact us

At the bottom right, there is a call-to-action button labeled "Spread the word".

Contextual help

QB Help System proactively suggests relevant tips for a customer. Proactive suggestions can provide a hint or teaser and lead the customer seamlessly to other help channels.



Linking in-product and out-of-product help

By reinforcing the idea of a true QB Community, businesses can learn from each other a grow.

By tracking customer movement between in and out of product experiences we learn more about what the customer is doing and learning so we can provide smarter recommendations.

The screenshot shows a web browser displaying a QuickBooks Community help article. The URL in the address bar is [https://www.intuit.com/quickbooks/community/help-articles/employees-and-payroll-taxes/how-to-classify-workers-as-employees-or-independent-contractors](#). The page title is "How to classify workers as employees or independent contractors". The article was posted by "QuickBooksHelp Intuit" on October 25, 2018, at 12:37 AM and last updated on November 15, 2018, at 2:53 PM. The content discusses the distinction between independent contractors and employees, mentioning IRS rules. A note at the bottom of the article section states: "Note: Make sure that you track payments to your contractor in special ways to make it easier for you to file IRS Form 1099-MISC at the end of the year." Below the article, there's a section titled "Employees" with a note: "Note: Make sure that you create paychecks for that employee and file Form W-2 at the end of the year." On the right side of the page, there's a sidebar titled "Related discussions" with several links to other articles. At the bottom right, there's a green button with the text "Contact us".

Seamless contact experience between OPH and IPH

The customer can continue to do work while waiting for an agent and get help in product when the agent is available.

The screenshot shows the QuickBooks Payroll software interface. The top navigation bar includes the Intuit QuickBooks logo, the company name "Orchids R Us Payroll", and standard icons for search, settings, and help. The main menu on the left lists various modules: Dashboard, Employees (selected), Contractors, Workers' Comp, Banking, Sales, Expenses, Workers (highlighted in green), Reports, Taxes, Accounting, My Accountant, Apps, and Print W-2s. The central workspace is titled "My payroll". A prominent blue callout box in the center says "Finish Bank Setup" with the sub-instruction "Connect your company bank account to continue using Full Service Payroll. Connect account now". Below this, the "Employees list" is visible, featuring a search bar ("Find an employee") and a dropdown menu ("Active employees"). To the right of the list are buttons for "Payroll year-end guide" and "Add an employee". A large gray overlay box on the right side contains the text "MESSAGING WINDOW".



How we achieve our goals

Approach

Laddered approach in phases

Customer granularity by tenure, type, ltv, etc.

Deep link help in content and campaigns

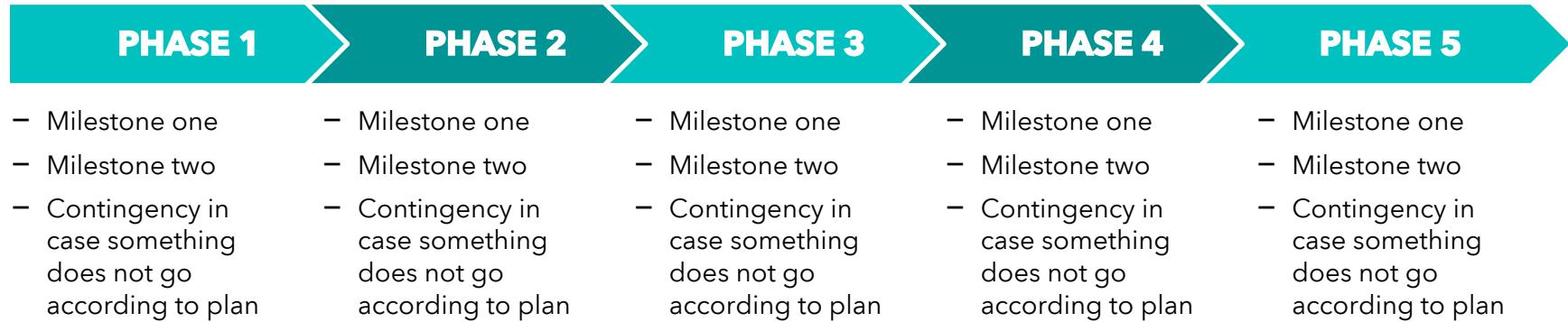
Identify customer journey maps to focus by priority

Approach

Onwards & upwards!



Process flow chart



Appendix



Current State Summary

Though we own multiple self help touch points, we are currently not treating them as an ecosystem.

For many touch points we cannot connect a user's help journey to their product journey i.e. a customer's data doesn't travel with them through their help experience.

Our help is primarily reactive:

- Waiting for customers to ask for help
- Help as an afterthought
- Help as mainly "how to" content
- "50 first dates"
- Siloed help experiences

Know me

- Know my business and how I use your product.
- Provide me with contextually relevant content.
- My data travels with me.

Guide me

- Show me and take me, don't just tell me.
- No dead ends.
- Catch me before I fall.

Connect me

- Help me connect with the appropriate level of assistance.
- Help me grow my business by **unlocking the power of millions for the prosperity of one.**

A single column of content

Paragraph titles in sentence case AvenirNext for INTUIT SemiBold

Introductory or main content. Bullets can be applied by using the Increase Indent control.

- Bullets use 3rd level text indent
 - And 4th level indent

Sample executive summary

Sample heading

Lorem ipsum dolor sit amet, meis habeo doming nec te. Et est vidit dicta liber, cu sea omnis ludus. Nemore aperiam facilisis has in. Cu vis sonet putant iisque, ut ferri aperiri diceret his.

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Make comparisons using two columns

Column title 1 in AvenirNext forINTUIT

Second level style applied using
Paragraph Increase Indent control is
AvenirNext forINTUIT

- Bullet items are AvenirNext forINTUIT
 - Bullet item three uses fourth level indent
AvenirNext forINTUIT
 - Incidental text that belongs with the bullet point above
is styled with the fifth level indent AvenirNext forINTUIT

Column title 2

Second level style applied using
Paragraph Increase Indent control

- Indent item one uses fourth level indent in case
you do not wish to use bullets
- Indent item two uses fourth level indent
 - Incidental text applied as fifth level indent

Second level indent and so on

Using three columns for text or visuals

A subtitle layout keeps the title above short while giving more detail to your slide

Column title one centered

Paragraph body text

You can delete this text block
and insert a photo or a chart
instead by clicking on the
icon

Column title two centered

Paragraph body text

Column title three centered

Paragraph body text

Eyebrow text category placeholder

Eyebrow title layout

Text block placeholder top level format AvenirNextforIntuit 26 pt

Use indent text control for second level text style

- Use indent text control for bullets: third level text style
 - Use indent text control for bullets: fourth level text style

Use this layout for printed slides only

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Use this layout for printed slides

This text is much too small for projecting.

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- 
- Layout for long section break title



**Layout for short
section break title**

Section break title



Section break title







**This is a sample photo plus text overlay slide layout.
See the notes for instructions on changing the photo**

**This is a sample
photo plus text
overlay slide layout.**

See the notes for
instructions on
changing the photo









Three photos plus a title layout



Three photos & captions plus a title layout



Barber shop



Cosmetics



Photographer

“

Quote + photo layout.
Use for left facing images.



– Quote attribution here



“

**Quote + photo layout.
Use for right facing images.**

– Quote attribution here

“

Saved me so much hassle

Great app, already saving me so much time and effort. The mileage tracker & receipts stuff is class!

– Customer Review, UK

Nice!!

Know what is happening with your business at a glance. Setup automatic detection of income & expenses with your bank accounts.

Invoice on the run. Five stars from me.

– Customer Review, Australia

Love it!!!

This app has greatly improved and simplified my bookkeeping. At this point I feel like I would be lost without it. Also, exporting to TurboTax at year end saves hours at tax time.

– Customer Review, US

FROM

How it was then

Add text, chart, or image here

TO

How it is now

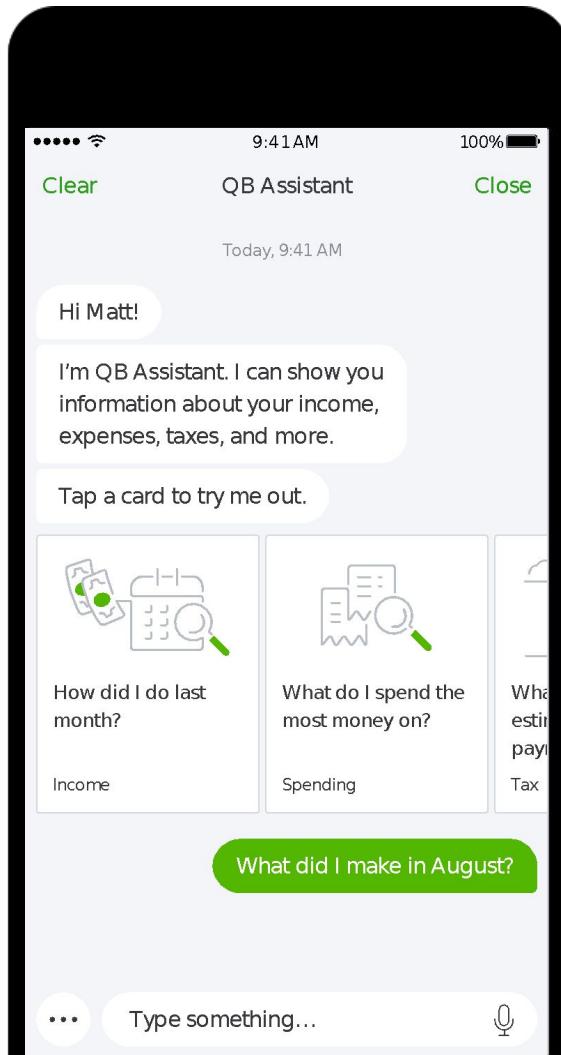
Add text, chart, or image here

Mobile product screen slide

Add your text here

To add your screenshot, delete the QB Assistant screenshot and click the icon in the placeholder

- More text with bullets

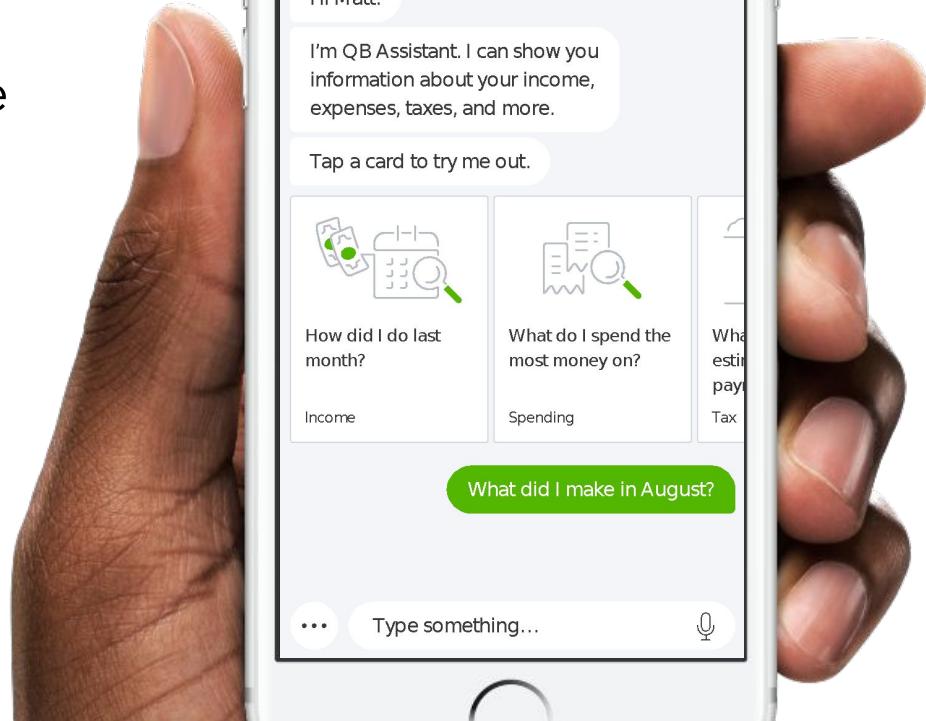


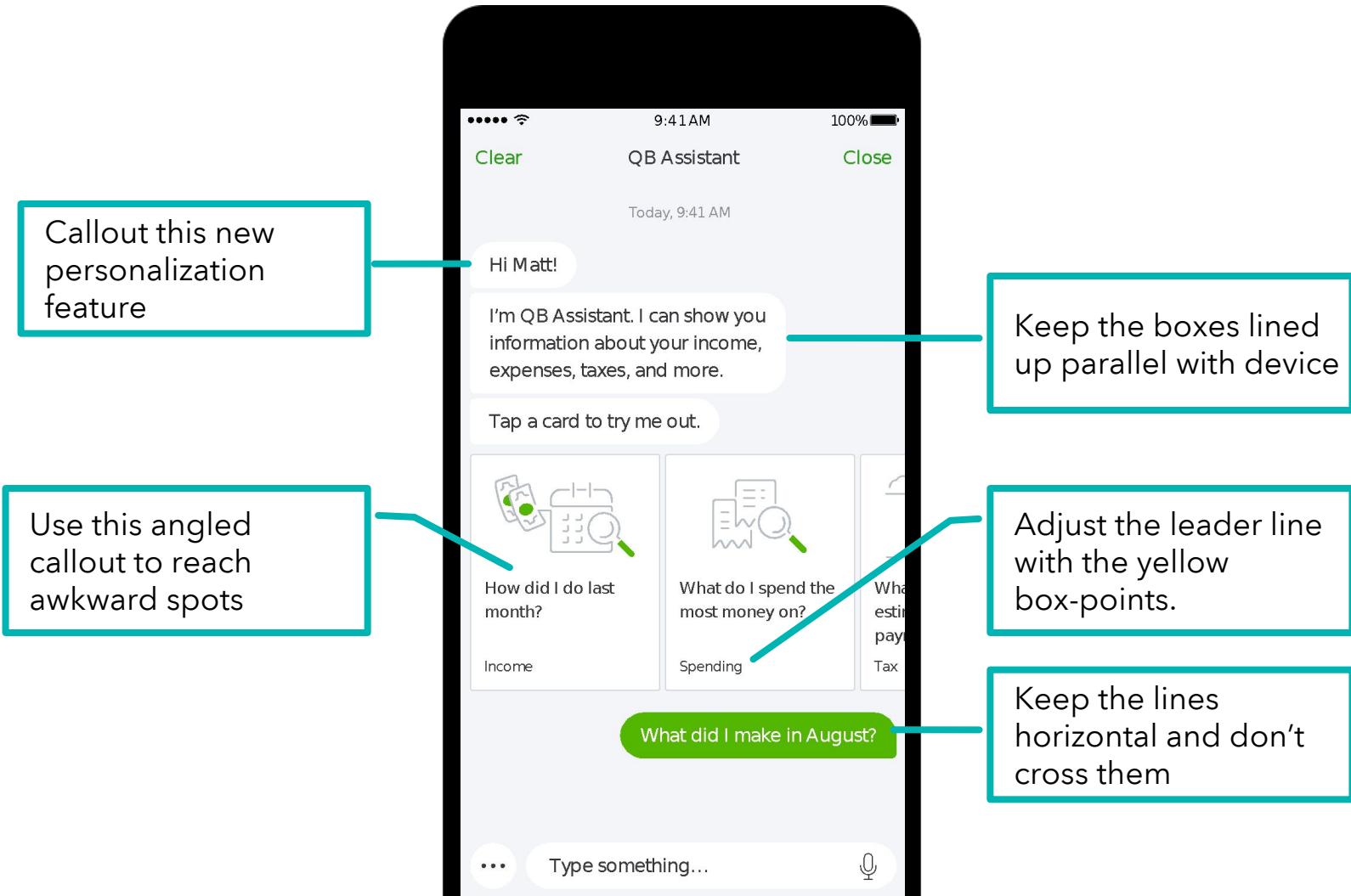
Mobile product screen slide + hand

Add your text here

To change the screenshot, delete the QB Assistant screen and click the icon in the placeholder

- More text with bullets





Laptop device layout

Paragraph about screenshot

Indent level one

- Indent level two for bullets

The screenshot shows the QuickBooks Accountant software interface. At the top, there's a green header bar with the 'qb Accountant' logo, a 'Go to client's QuickBooks' dropdown, and various icons for search, settings, and help. Below the header, the main dashboard is divided into several sections:

- YOUR PRACTICE**: Shows performance metrics over the last 30 days. It includes sections for Clients (19 Profile views), Team (4 Leads and inquiries), ProAdvisor (10 Social link views), and Work (Preview your public profile). A 'Profile strength' bar is shown as 'Strong'.
- YOUR BOOKS**: Lists categories like Dashboard, Banking, Sales, Expenses, Employees, Reports, Taxes, and Accounting.
- Rich Preece Profile**: Displays a circular profile picture of a man, Rich Preece. His name is listed as 'Rich Preece' with 'No reviews yet'. His contact information includes 'Preece Accounting Solutions' at '400 Scott St, Darling Park, NSW 2000', 'www.preeceaccounting.com.au', and an email address 'rich.preece@preeceaccounting.com.au'. His phone numbers are listed as 'Office: 02 5555 3415', 'Mobile: 04 5555 4619', and 'Fax: No information provided'.
- Certified expert in**: Shows a badge for 'QuickBooks Online (ADVANCED)'.
- About me**: A brief description of Preece Accounting Solutions, mentioning they specialize in the construction industry and offer services like bookkeeping, tax, and help with QuickBooks software.

Big statement layout

Five words or less

Eyebrow text placeholder

Five words or less

Important point here

List detail items

Important point placeholder

Secondary point placeholder

- Third level point

90%

Big stat layout

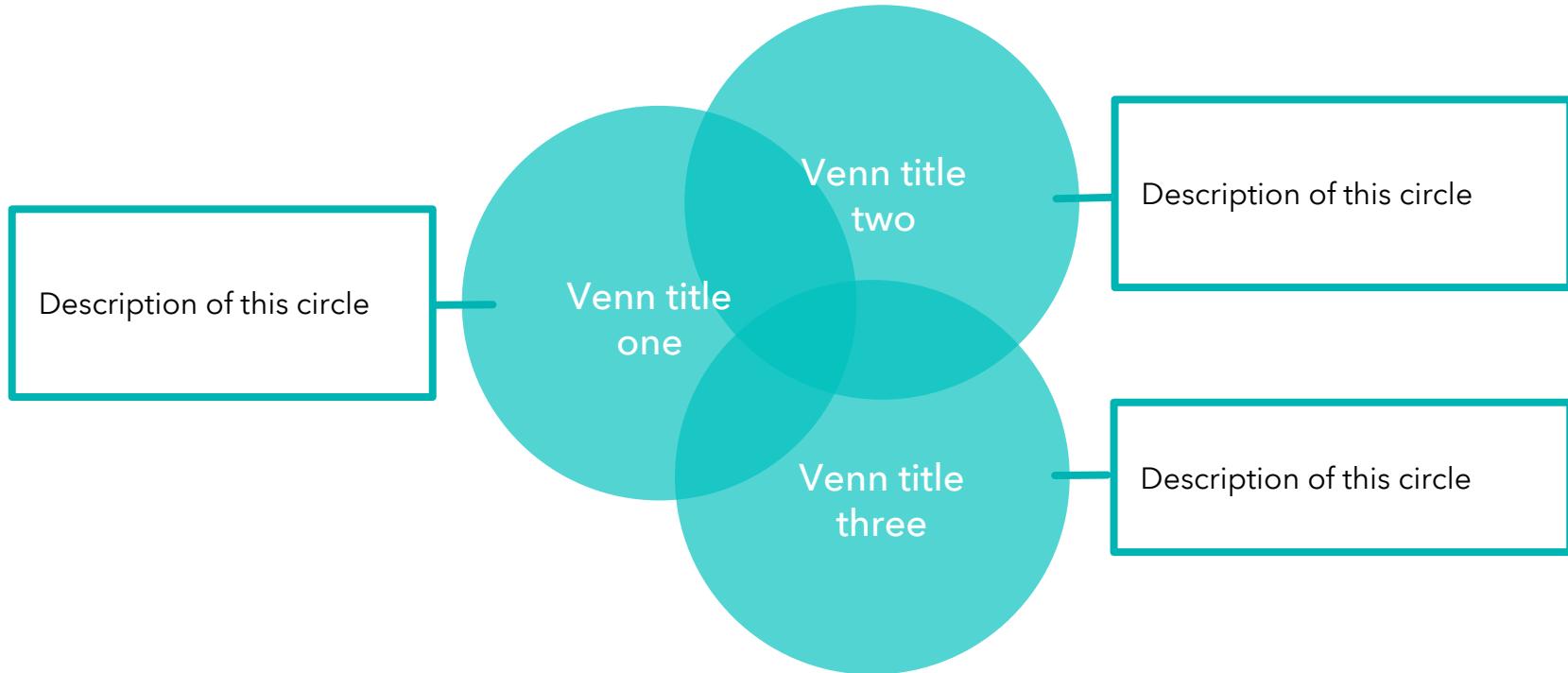
90%

Big stat layout

Supporting text

- Bullet text

Sample Venn diagram



Sample priorities layout

1 Column heading title	2 Column heading title	3 Column heading title
Target outcomes Lorem ipsum <ul style="list-style-type: none">• Bullets• Bullets	Target outcomes Lorem ipsum <ul style="list-style-type: none">• Bullets• Bullets	Target outcomes Lorem ipsum <ul style="list-style-type: none">• Bullets• Bullets
How we do it	How we do it	How we do it
<p> Lorem ipsum</p> <ul style="list-style-type: none">• Bullets• Bullets	<p> Lorem ipsum</p> <ul style="list-style-type: none">• Bullets• Bullets	<p> Lorem ipsum</p> <ul style="list-style-type: none">• Bullets• Bullets

Sample photo layout with comments at right

A consistent frame to showcase charts, tables and images with commentary



Header placeholder

Paragraph about image

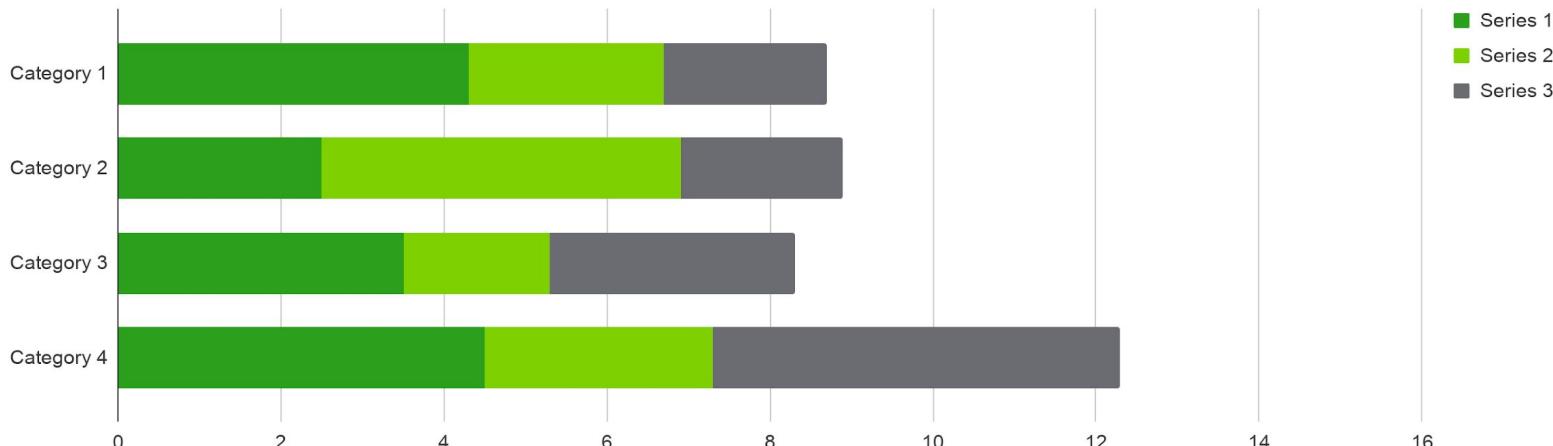
- Bullet level one
 - Bullet level two
- Bullet level one
 - Bullet level two
 - Bullet level three
- Bullet level one
 - Bullet level two
 - Bullet level three

Chart created in Google Sheets and linked.
Select chart and click on the icon in the right corner to edit. **Save a copy before you edit.**

Sample bar chart

By clicking on icons in the empty container you can add a chart, graph or image

Chart title

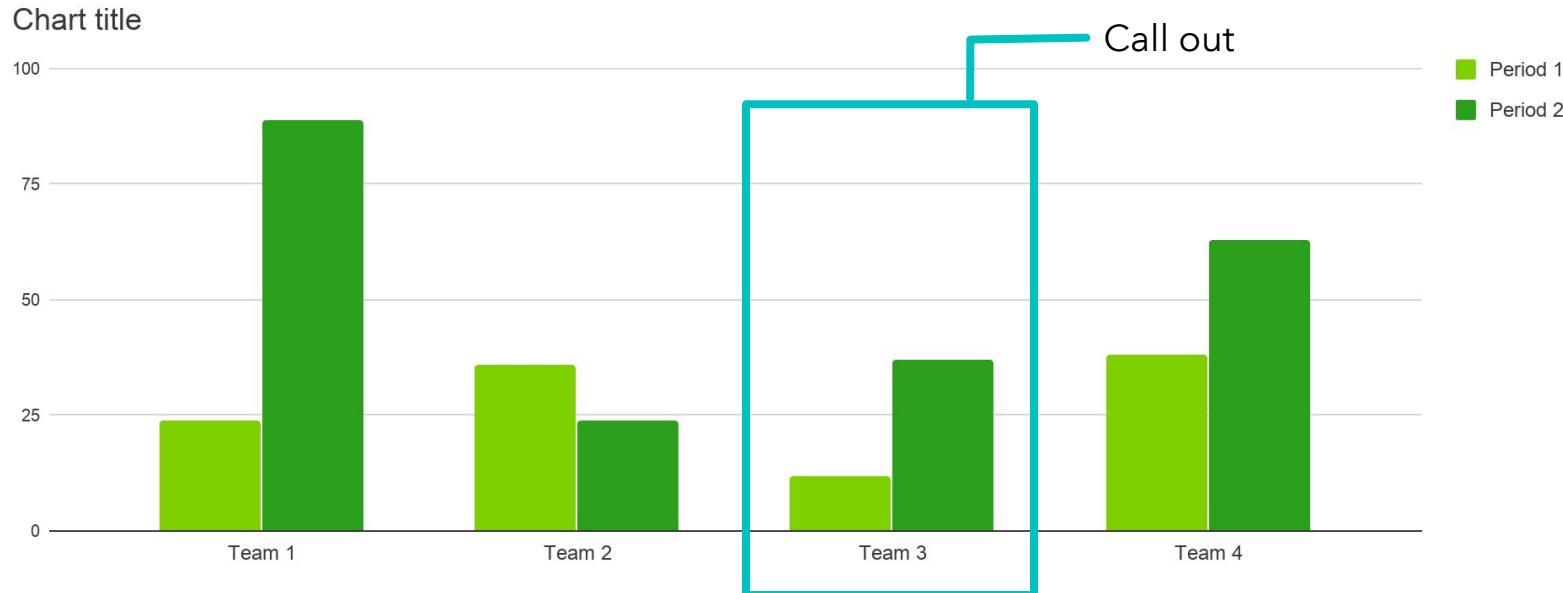


Source: placeholder for data source here, 2018.

Chart created in Google Sheets and linked.
Select chart and click on the icon in the right corner to edit. **Save a copy before you edit.**

Sample column chart

Copy/paste this chart into your presentation. use the Chart design tab to edit the data in Excel



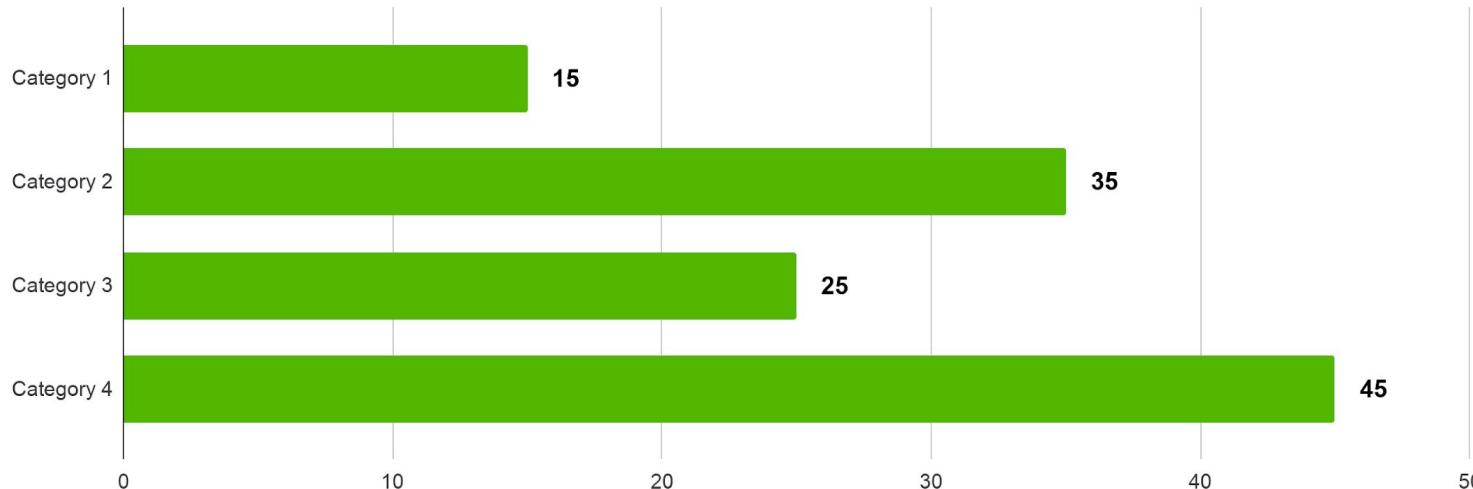
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Chart created in Google Sheets and linked.
Select chart and click on the icon in the right corner to edit. **Save a copy before you edit.**

Sample bar chart

Copy/paste this chart into your presentation. use the Chart design tab to edit the data in Excel

Chart title



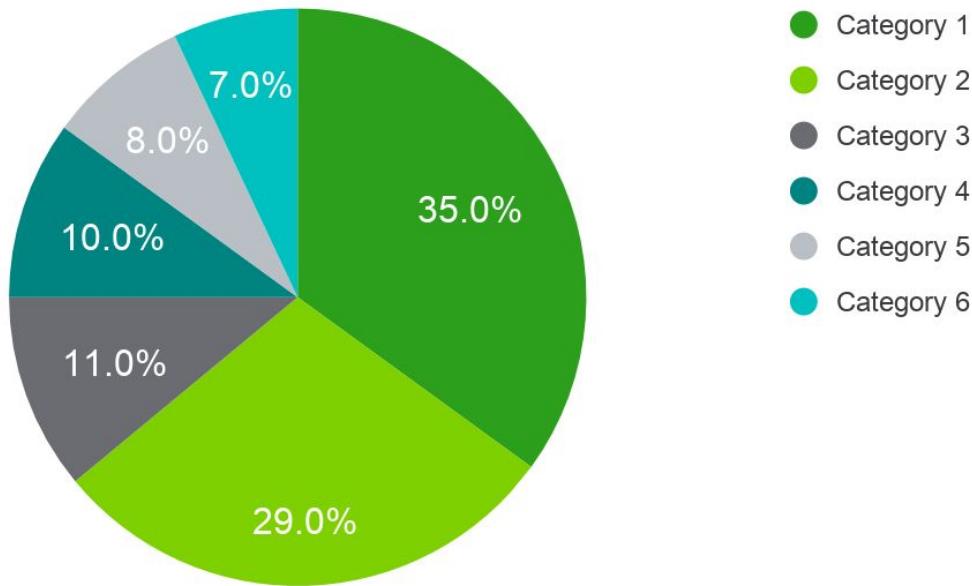
Source: placeholder for data source here, 2018.

Sample pie chart

By clicking on icons in the empty container you can add a chart, graph or image

Chart created in Google Sheets and linked.
Select chart and click on the icon in the right corner to edit. **Save a copy before you edit.**

Chart title



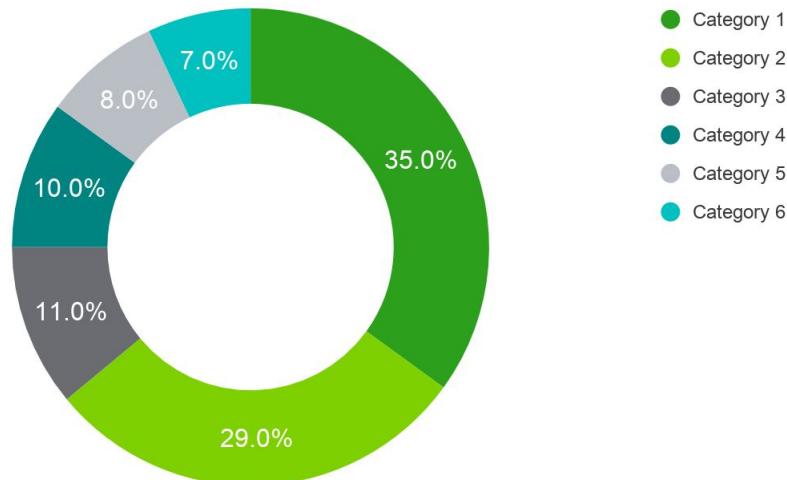
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Chart created in Google Sheets and linked.
Select chart and click on the icon in the right corner to edit. **Save a copy before you edit.**

Sample pie chart

By clicking on icons in the empty container you can add a chart, graph or image

Chart title



Source: placeholder for data source here, 2018.

Sample table layout

Best to copy/paste this table and use the table tools to add/delete rows or columns

COLUMN TITLE	COLUMN TITLE IN TEAL HEADER ROW	HEADER COLUMN TITLE
First of three	<ul style="list-style-type: none">Bullet item oneBullet item twoBullet item three	<ul style="list-style-type: none">Bullet item oneBullet item twoBullet item threeBullet item four
Second of three	<ul style="list-style-type: none">Bullet item oneBullet item two	<ul style="list-style-type: none">Bullet item one
The last of three	<ul style="list-style-type: none">Bullet item one	<ul style="list-style-type: none">Bullet item one

Table layout

Best to copy/paste this table and use the table tools to add/delete rows or columns

COLUMN A	COLUMN B	COLUMN C	COLUMN D	COLUMN E	COLUMN F	COLUMN G
\$100.00	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00
\$25.00	\$25.00	\$25.00	\$25.00	\$25.00	\$25.00	\$25.00
\$.0825	\$.0825	\$.0825	\$.0825	\$.0825	\$.0825	\$.0825
\$150.99	\$150.99	\$150.99	\$150.99	\$150.99	\$150.99	\$150.99
\$160.00	\$160.00	\$160.00	\$160.00	\$160.00	\$160.00	\$160.00
\$436.07	\$436.07	\$436.07	\$436.07	\$436.07	\$436.07	\$436.07

Green/yellow/red "Stoplights" are a text object. Copy and paste them, and use the text color picker to change the color and Font size to change their size

Status table layout

Format the table using the Table Options controls

FUNCTION	STATUS	DESCRIPTION	NEXT MILESTONE
Product	●	Lorem ipsum	Lorem ipsum
Finance	●	Lorem ipsum	Lorem ipsum
Marketing	●	Lorem ipsum	Lorem ipsum
Sales	●	Lorem ipsum	Lorem ipsum
Customer success	●	Lorem ipsum	Lorem ipsum
One last thing	●	Lorem ipsum	Lorem ipsum

Green/yellow/red "Stoplights" are a text object. Copy and paste them, and use the text color picker to change the color and Font size to change their size

Status table layout

Best to copy/paste this table and use the table tools to add/delete rows or columns

FUNCTION	STATUS	DESCRIPTION	NEXT MILESTONE
Product	●	Green/yellow/red "Stoplight circles" are text	Placeholder text
Finance	●	Copy and paste them into your table	Placeholder text
Marketing	●	Use the text color picker to change the color	Placeholder text
Sales	●	Use the font size to change their size	Placeholder text
Customer success	●	Placeholder text	Placeholder text
One last thing	●	Placeholder text	Placeholder text

Table layout

Best to copy/paste this table and use the table tools to add/delete rows or columns

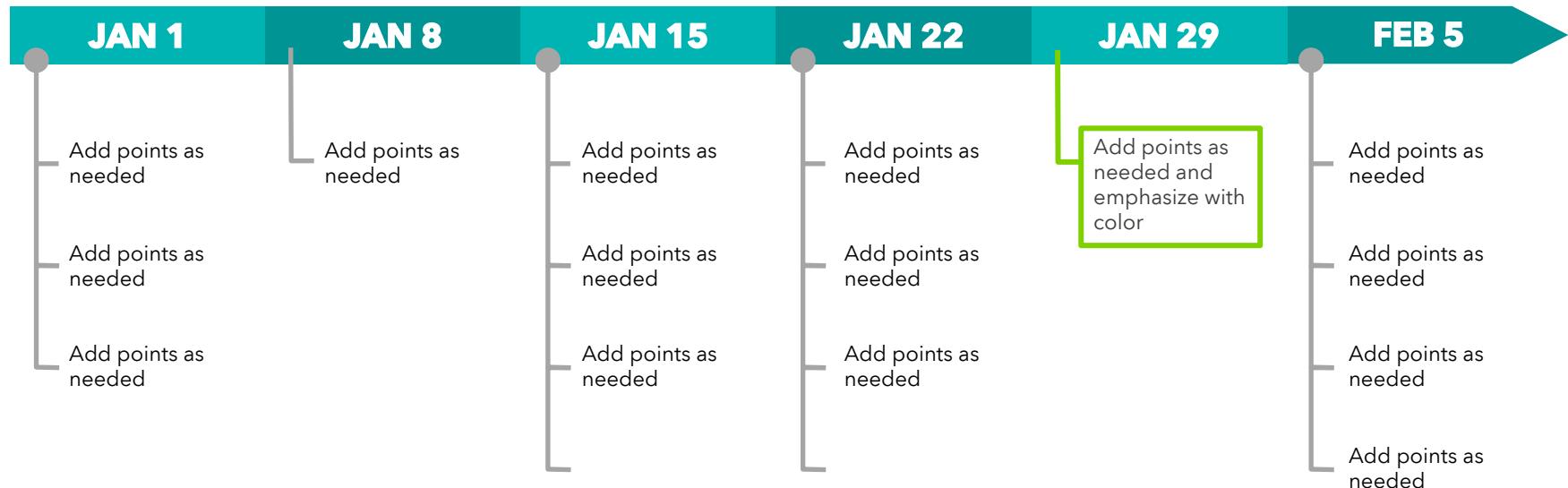
COLUMN TITLE	COLUMN TITLE IN TEAL HEADER ROW	HEADER COLUMN TITLE
First of three	<ul style="list-style-type: none">• Bullet item one• Bullet item two• Bullet item three	<ul style="list-style-type: none">• Bullet item one• Bullet item two• Bullet item three• Bullet item four
Second of three	<ul style="list-style-type: none">• Bullet item one• Bullet item two	<ul style="list-style-type: none">• Bullet item one
The last of three	<ul style="list-style-type: none">• Bullet item one	<ul style="list-style-type: none">• Bullet item one

Table layout

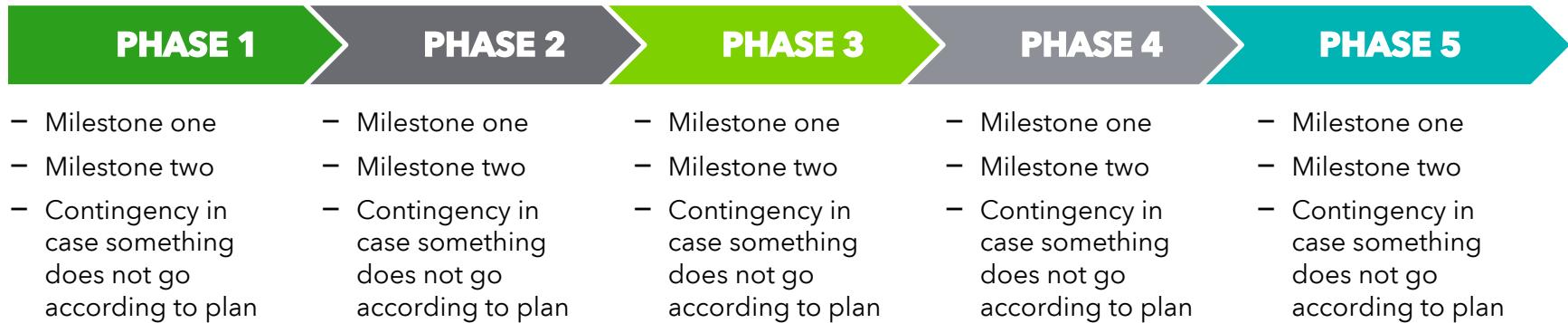
Best to copy/paste this table and format the table using the table options controls

COLUMN A	COLUMN B	COLUMN C	COLUMN D	COLUMN E	COLUMN F	COLUMN G
\$100.00	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00
\$25.00	\$25.00	\$25.00	\$25.00	\$25.00	\$25.00	\$25.00
\$.0825	\$.0825	\$.0825	\$.0825	\$.0825	\$.0825	\$.0825
\$150.99	\$150.99	\$150.99	\$150.99	\$150.99	\$150.99	\$150.99
\$160.00	\$160.00	\$160.00	\$160.00	\$160.00	\$160.00	\$160.00
\$436.07	\$436.07	\$436.07	\$436.07	\$436.07	\$436.07	\$436.07

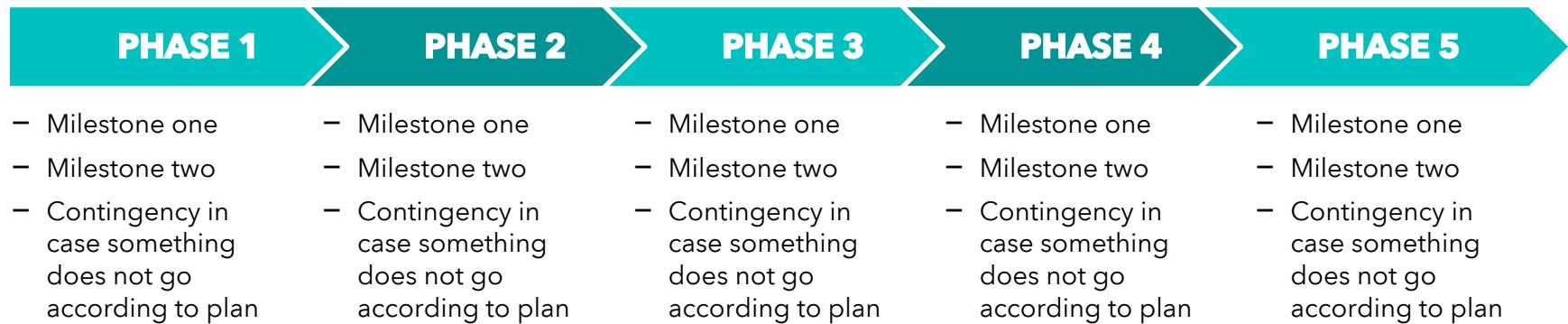
Timeline



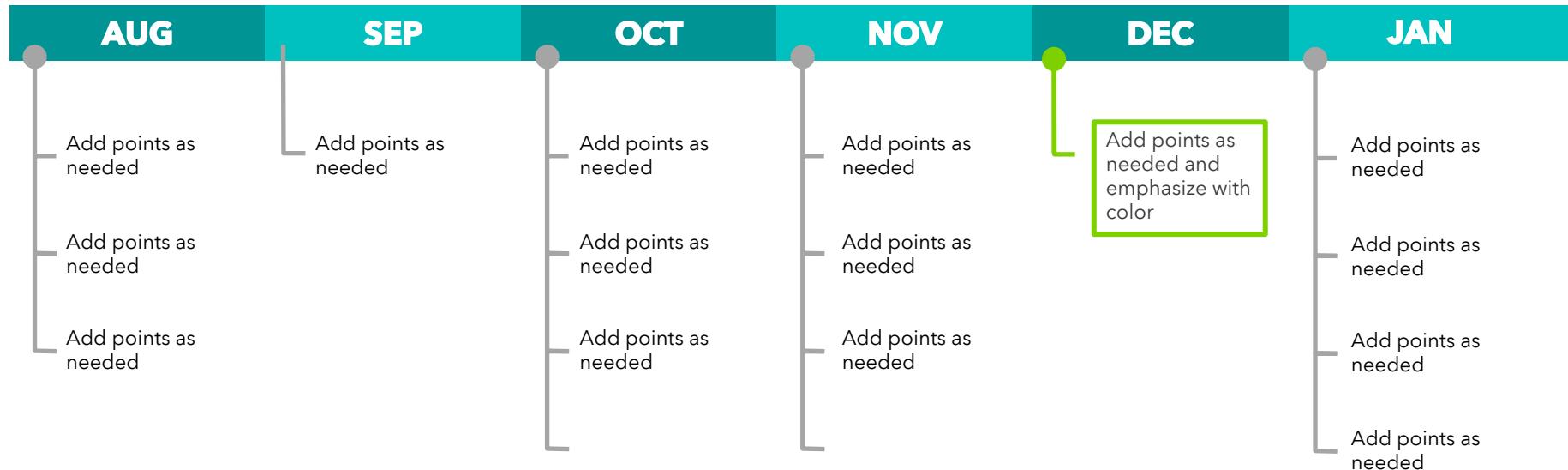
Process flow chart



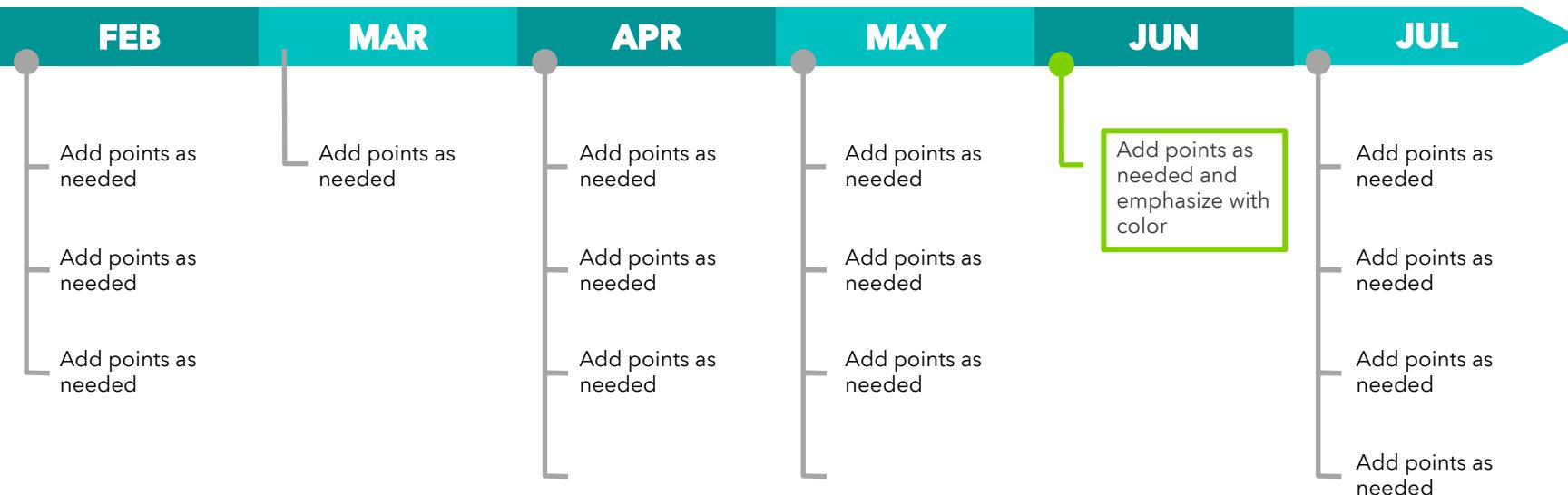
Process flow chart



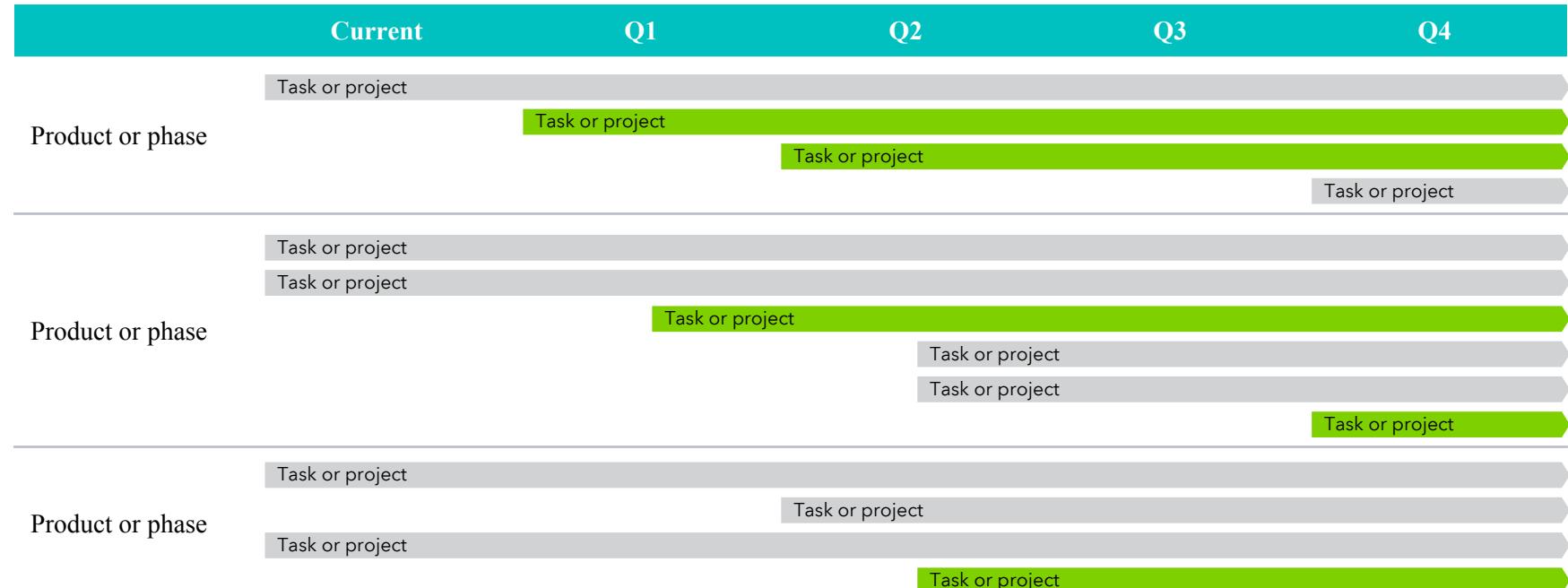
Fiscal year timeline



Fiscal year timeline

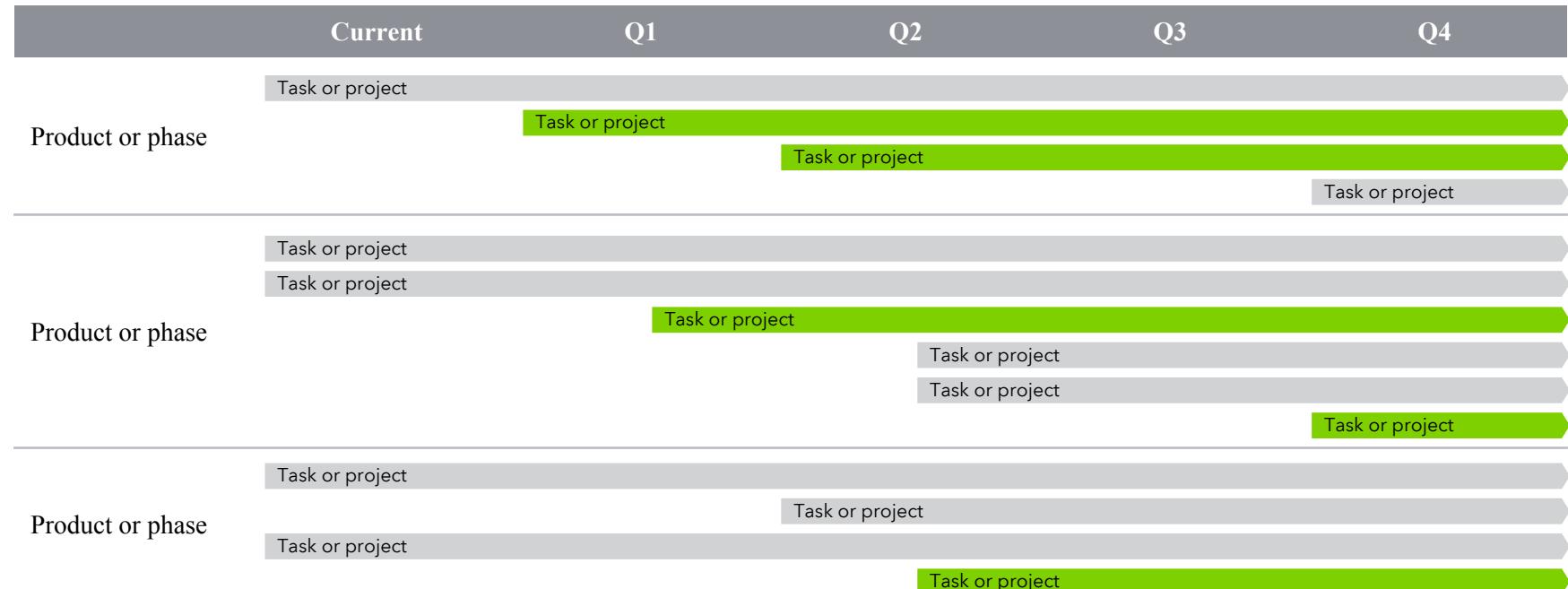


Sample timeline: product roadmap



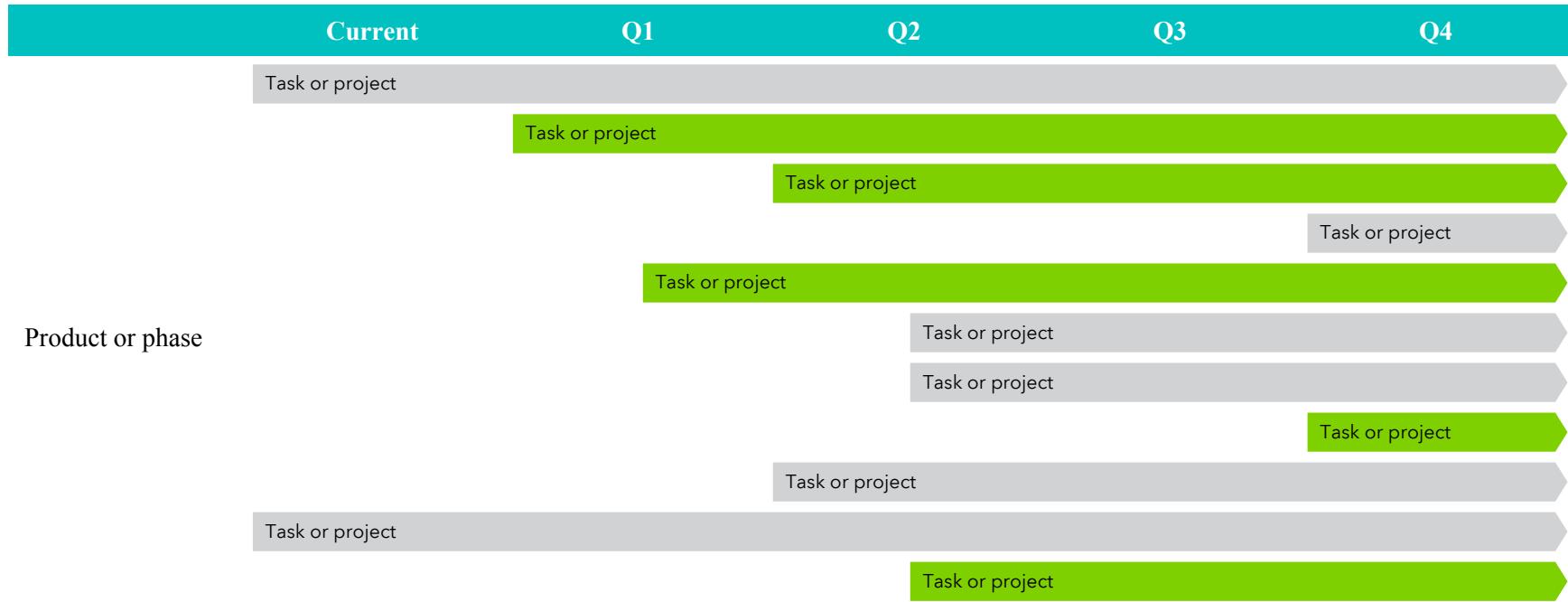
■ Text here ■ Text here

Sample timeline: product roadmap



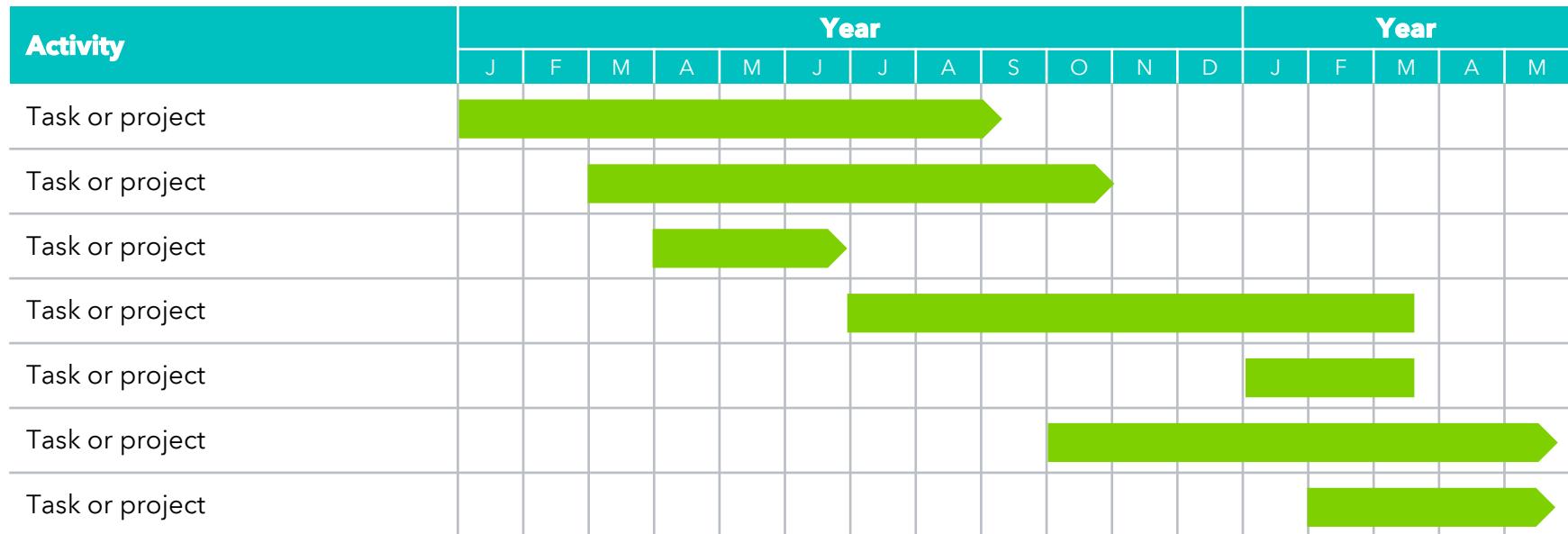
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Sample timeline: product roadmap

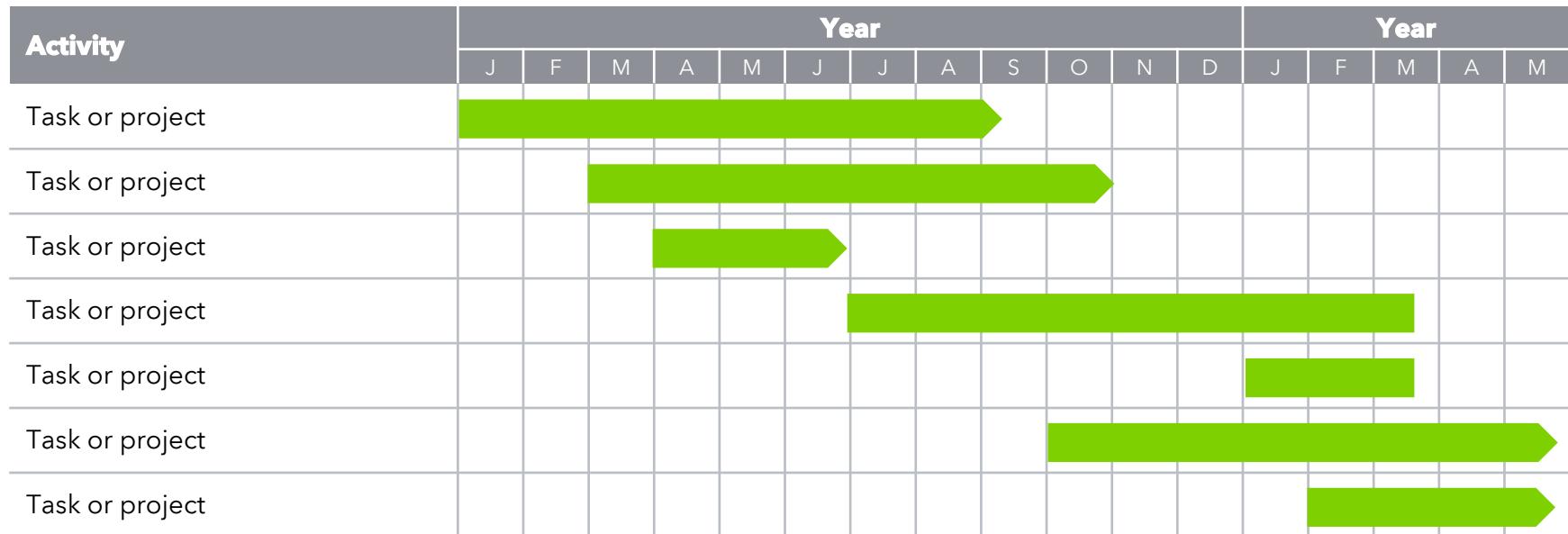


■ Text here ■ Text here

Sample timeline: Gantt chart



Sample timeline: Gantt chart



September 2018 (reusable calendar 6 week layout)

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
	Task or project					
9	10	11	12	13	14	15
	Task or project					
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

October 2018 (reusable calendar 5 week layout)

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
	Task or project					
14	15	16	17	18	19	20
	Task or project					
21	22	23	24	25	26	27
28	29	30	31			

September 2018 (reusable calendar 6 week layout)

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
	Task or project					
9	10	11	12	13	14	15
	Task or project					
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

October 2018 (reusable calendar 5 week layout)

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
	Task or project					
14	15	16	17	18	19	20
	Task or project					
21	22	23	24	25	26	27
28	29	30	31			



Thank you

Color palette

With Hex codes and R-G-B values

108000 16-128-0	2CA01C 44-160-28	53B700 83-183-0	7FD000 127-208-0	A9E838 169-232-56
000000 0-0-0	393A3D 57-58-61	6B6C72 107-108-114	8D9096 141-144-150	BABEC5 186-190-197
D4D7DC 212-215-220	E3E5E8 227-229-232	ECEEF1 236-238-241	F4F5F8 246-247-249	FFFFFF 255-25-255
00C1BF 0-193-191	00D7D7 0-215-215			

