HOW I DIDN'T SAVE INTUIT WITH A REDESIGNED EMAIL

Or how I spent my summer vacation

Suzanne Richards

A STORY ABOUT...

1. A customer problem

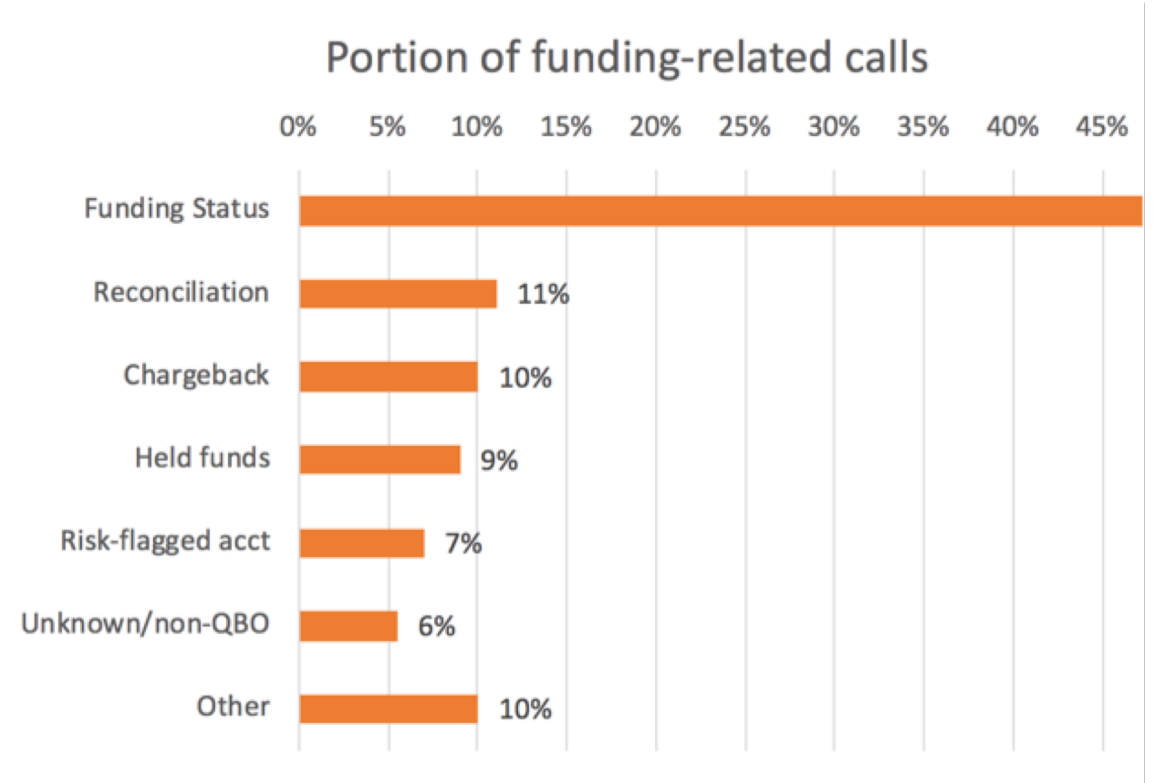2. Audits, testing/analysis, and art!

3. My recommendation

WHERE'S MY MONEY?

#2 call driver from Chase merchants to Payments Care

10% of volume

43,000 calls annually

$1M every year

Portion of funding-related calls

THEN....THIS.

Can you spot the funding time? (Hint...it's at the bottom)

You were just paid **$1.00**

A payment has been received on **invoice 1232**.

Here are your payment details:

Paid to	Shark Bait Divers
Invoice no.	1232
Paid date	August 2, 2018
Payment method	MasterCard
Payment amount	$1.00
Invoice total	$1.00
Invoice balance	**$0.00**

Your transaction ID for this payment is: **PG0173296936**

Funds will be deposited in your account in 2 - 3 business days.

CONTENT AUDIT

Add Bank 1

You got paid online! Add your bank to get the money.

Tell us a few details about your business and where to send the money. We'll deposit all your future payments here, too.

Add bank now

Do this by July 15 or you won't be able to accept online payments anymore.

Add Bank 2

Add your bank by July 30

You can't take any more online payments until you tell us a few details about your business and where to deposit your money.

Add bank now

Do this as soon as possible. Starting August 30, your payments will be refunded to customers.

Add more info 1

Add more info by July 15

We need a few more details about you and your business to support your online payment processing.

Add info now

Do this by July 15 or you won't be able to transfer online payments to your bank. We'll temporarily hold any payments you receive.

EVALUATED. AND GRADED.

Scannability

Emails should, above all, be scannable. **One big header,** minimal body copy and a CTA or two

Personalization

Let's try and do it whenever possible

Email layout patterns

Info hierarchy should be **customer-focused.** What is this email about? Make sure that is **clear in the first few seconds** in the top of the fold

One idea per email

I'm a fan of 1…maybe 2 if the second one is down low

Images

Images **engage.** How about at least one? It's true the goal is to be champion our users, but some of our transaction emails are just bare

Interactivity

Let's try to take them back to the product when it makes sense.

Voice & tone

Our principles require us to make it about them, not us, keep it simple, and to remind them of the payoff (**not limited to, of course!**)

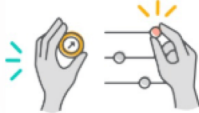# COMPETITIVE ANALYSIS

AirBnB: nice use of copy!

COMPETITIVE ANALYSIS, CONT.

Coinbase: closer to the design I think we need

MY EMAIL DESIGN!

Here's what came out of my research…

Counterpart portal recommendations

Customer
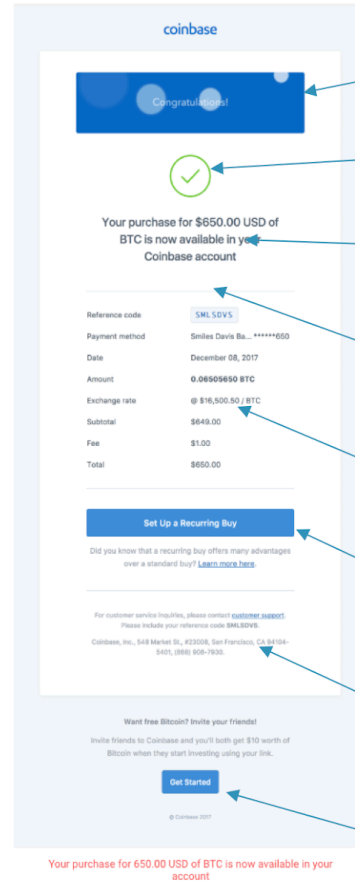
- Merchant logo
- Icon
- Message about what's happening
- Tina's Art Shop says: <insert message from merchant>
- Payment details
- CTA
- This message is from Tina's Art Shop, PO Box 123, Davis, CA 95616 Phone <Email Tina>
- Powered by QuickBooks

NEW EMAIL!

I tried to design it, but was promply relieved of my duties.

You were paid $2.00

Hi Mark,

Lisa Skelly scheduled a payment.

We'll let you know when your payment goes through. Your payment should be in your account by 05/10/2018.

Scheduled payment date:	05/06/2018
Amount:	$1,500
Invoice:	1024
Paying with:	Visa (...1234)
Invoice total:	$1,500
Invoice balance:	$1,500

View invoice

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Who: 20 adults

A/B split test

How long, in seconds, did it take you to learn how much you were paid?

How long, in seconds, did it take you to learn when your payment would be in your account?

On a scale from 1-5, tell us how much you think this company values your success.

THE TEST!

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Here are your payment details:

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Invoice no. 1232

Paid date August 2, 2018

Payment method MasterCard

Payment amount $1.00

Invoice total $1.00

Invoice balance $0.00

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View on web

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(In seconds) How much were you paid?	3.3	2.7
(In seconds) when will money land in your account?	6.5	5
Scale of 1-5, how much does this company value your success?	3.4	3.5

SO HOW DID I NOT SAVE INTUIT?

They aren't mad….just disappointed.

"NOT KNOWING FUNDING TIMES" IS NOT A TOP CUSTOMER COMPLAINT

These are.   Faster funding project addressing this

Getting let down by my solution

Payment solution fails
Slow time to deposit

Getting burned by my customers

Securing commitment from customers
Final invoice never getting paid
Working with customers I don't trust

Making tradeoffs in order to get paid

Paying to get paid
Accept payment in a way that's less convenient for me

Tracking across multiple solutions

Knowing who has and hasn't paid me
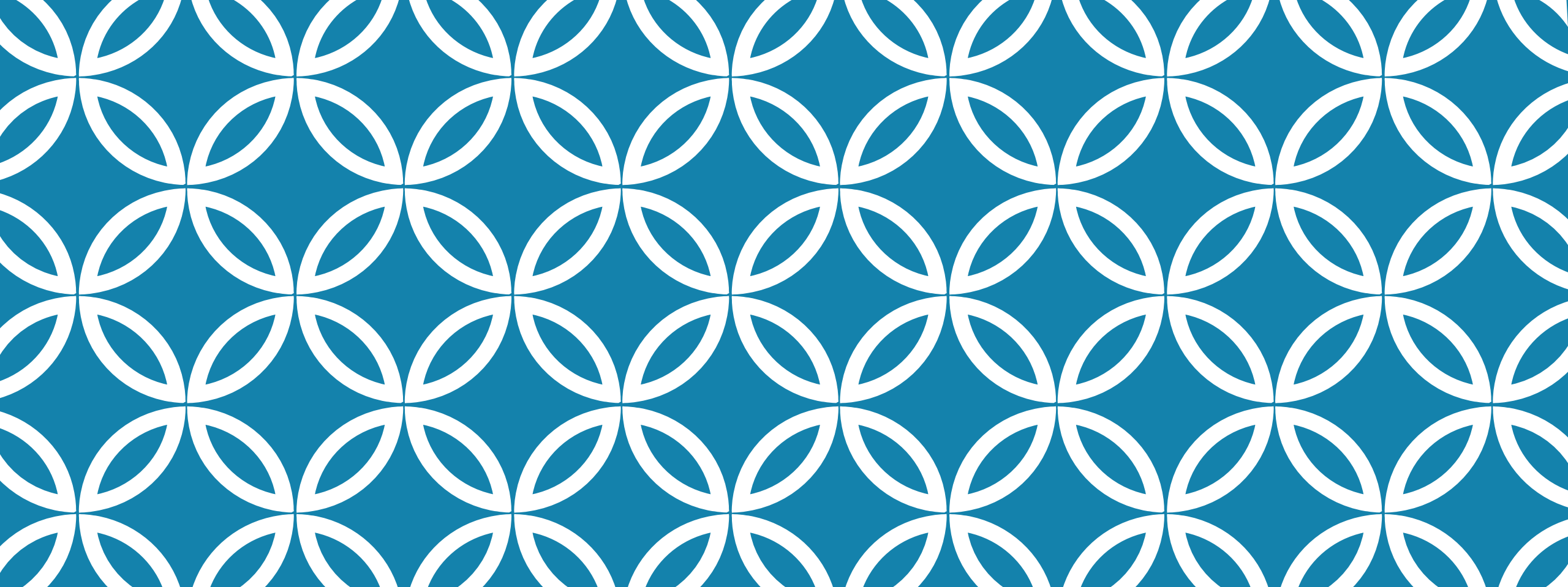Knowing how much money I've made

Deposits list project addressing this

COUNTERPART PORTAL HAS A BETTER EMAIL!

This new scalable email can address:

schedule pay
partial payments
recurring payments

Feedback	Count	%
Paypal	1800	30%
Accept credit cards	721	12%
Auto pay	701	12%
Account history & management	486	8%
Schedule pay	412	7%
Statement pay	379	6%
Printing	276	5%
Messages	209	3%
Receipt	202	3%
Over payment	202	3%
Payor name	177	3%
Misc	135	2%
Partial payments	100	2%
Recurring payments	92	2%
Pasting account #	50	1%
Bug	46	1%
Login	18	0%
Wallet	13	0%
Grand Total	**6019**	**100%**

THANK YOU!

Suzanne Richards