

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

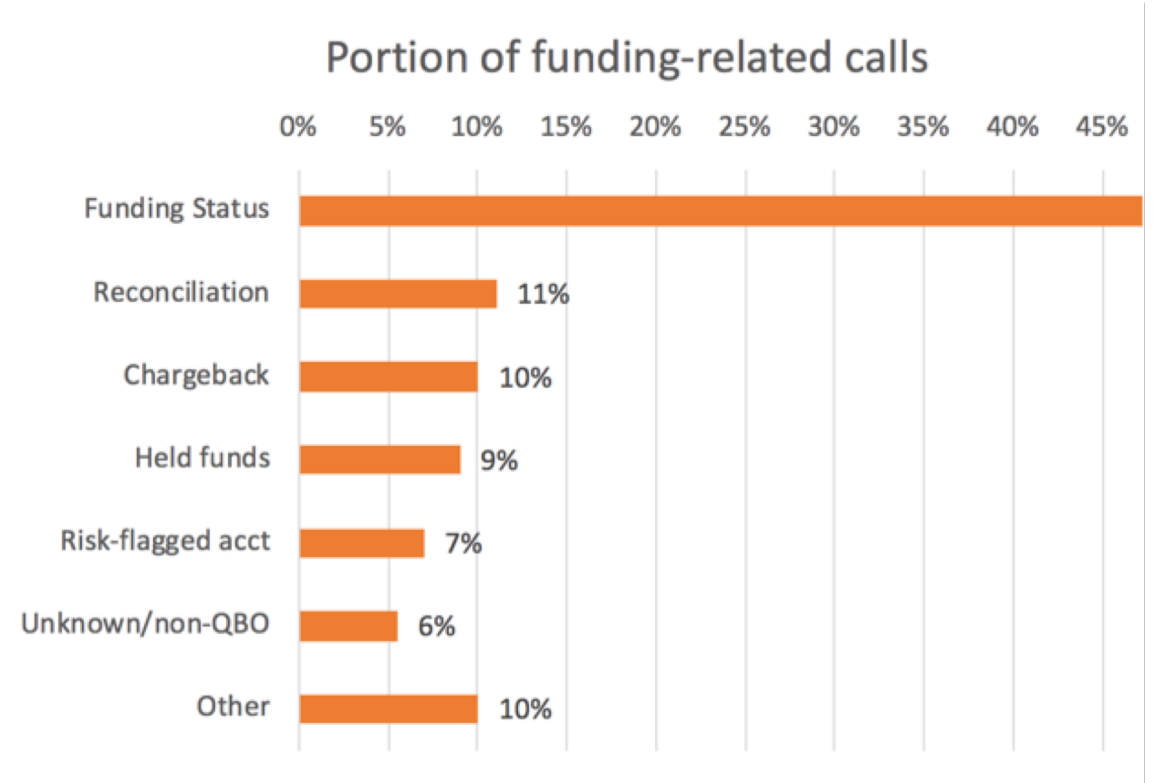
WHERE'S MY MONEY?

#2 call driver from Chase merchants to Payments Care

10% of volume

43,000 calls annually

\$1M every year



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

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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

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

[Facebook](#) [Twitter](#) [LinkedIn](#)

[View us on web](#)


Payment processing services provided by Stripe, Inc., 160 Berry Street, Suite 500, San Francisco, CA 94107.

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Add Bank 2

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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

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

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Add more info 1

intuit quickbooks [Sign in](#)

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

1 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.

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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!




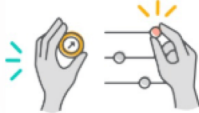
Let's finish your listing!

Hi Smiles Davis,

Congratulations on starting your **Relaxing Private 2BR Apartment - walk to downtown**. With just a few more steps, you'll be ready to receive your first booking requests. And we'll help you every step of the way.

Finish your listing




- Enter basic details
- Describe your space and add photos
- Set up your calendar and price
- Welcome your first guest!



This is where it all begins

Explore millions of inspiring places. Find one to call your own, whether it's far away or close to home.

Find a place to call home



You're almost ready to host

Still have questions about hosting? Read how Airbnb provides you with peace of mind, ways to improve your listing, and reviews to help you know who's going to stay in your home.

Publish your listing


Helpful links

- Get peace of mind with our Host Guarantee and Host Insurance Protection Program [▶](#)
- Improve your listing and watch your booking demand soar [▶](#)
- Know who's going to stay in your home before they arrive by reading reviews [▶](#)

COMPETITIVE ANALYSIS, CONT.

Coinbase: closer to the design I think we need

coinbase



Your purchase for \$650.00 USD of BTC has started

Your funds will be available by

December 05, 2017

We're unable to cancel started orders. [Read more about why here.](#)

Reference code	SMLS DV5
Payment method	Smiles Davis Ba... *****650
Start date	November 27, 2017
Estimated payout	December 05, 2017

Amount	0.06505650 BTC
Exchange rate	@ \$16,500.50 / BTC
Subtotal	\$649.00
Fee	\$1.00
Total	\$650.00

[View Purchase](#)

Frequently asked questions

[How long does a purchase or deposit take to complete?](#)


[How are fees applied when I buy or sell digital currency?](#)


[Can I cancel my purchase?](#)

For customer service inquiries, please contact [customer support](#). Please include your reference code SMLS DV5.

Coinbase, Inc., 548 Market St., #23008, San Francisco, CA 94104-5401, (888) 908-7930.

coinbase





Your purchase for \$650.00 USD of BTC is now available in your Coinbase account

Reference code	SMLS DV5
Payment method	Smiles Davis Ba... *****650
Date	December 08, 2017
Amount	0.06505650 BTC
Exchange rate	@ \$16,500.50 / BTC
Subtotal	\$649.00
Fee	\$1.00
Total	\$650.00

[Set Up a Recurring Buy](#)

Did you know that a recurring buy offers many advantages over a standard buy? [Learn more here.](#)

For customer service inquiries, please contact [customer support](#). Please include your reference code SMLS DV5.

Coinbase, Inc., 548 Market St., #23008, San Francisco, CA 94104-5401, (888) 908-7930.

Want free Bitcoin? Invite your friends!

Invite friends to Coinbase and you'll both get \$10 worth of Bitcoin when they start investing using your link.

[Get Started](#)

© Coinbase 2017

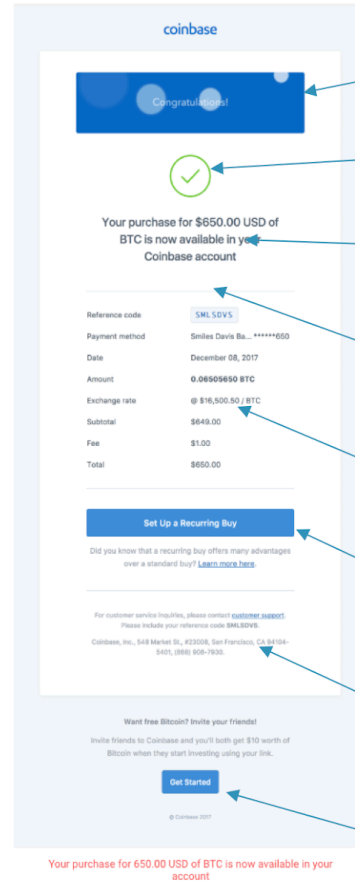
Your purchase for 650.00 USD of BTC is now available in your account

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 promptly
relieved of my duties.

[View on web](#)



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](#)

 **intuit quickbooks.**

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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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[View invoice](#)



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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

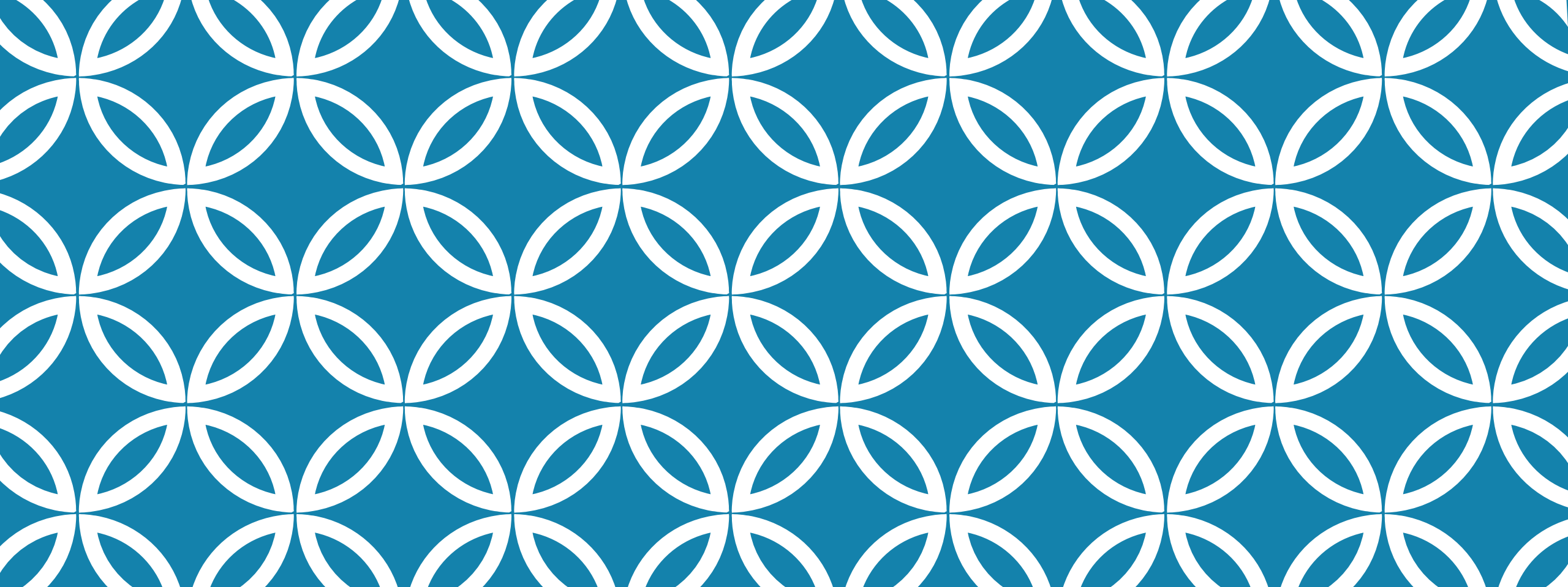
Deposits list project addressing this

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