

CASE STUDY:
DO MORE WITH QUICKBOOKS

Intuit 2014

OPPORTUNITIES

- Small business owners aren't always aware of how to get the most out of QuickBooks or how to most effectively run a business—they might not know what they don't know.
- QuickBooks has resources that are scattered across the marketing web site. Consolidating resources and moving them in app could be most useful to customers since they might not always think to leave the app to look for help.
- Providing resources when people are signed in also allows us to customize offerings. Making information relevant is critical because users are already paying for the app—if we suggest too many in-app purchases, the links might be annoying rather than helpful.

PROCESS

The project was a series of leans tests over six months to gather data to validate whether it was worth building the feature.

- We ran three A/B tests to measure which design most effectively lead people to resource material.
- The project started as a week-long hackathon project, with one day for design.
- In between each quantitative test, we ran qualitative user studies to iterate on designs for quantitative tests.

The end result was stakeholder approval to proceed with the project.

EXISTING DESIGN

The last (turquoise) link in the left nav rotates between three promotions: payroll, checks, and payments. Because the promotions come and go, our hypothesis—based on previous versions of QuickBooks—is that having a persistent location where customers can find relevant information and products will increase revenue.

- Home
- Customers
- Vendors
- Employees
- Transactions
- Reports
- Sales Tax
- Apps
- Turn On Payroll

Get started with QuickBooks | [Welcome Guide](#)

1-MIN TOUR

An overview of QuickBooks

1-MIN TOUR

Get paid faster with Intuit Payments

1-MIN TOUR

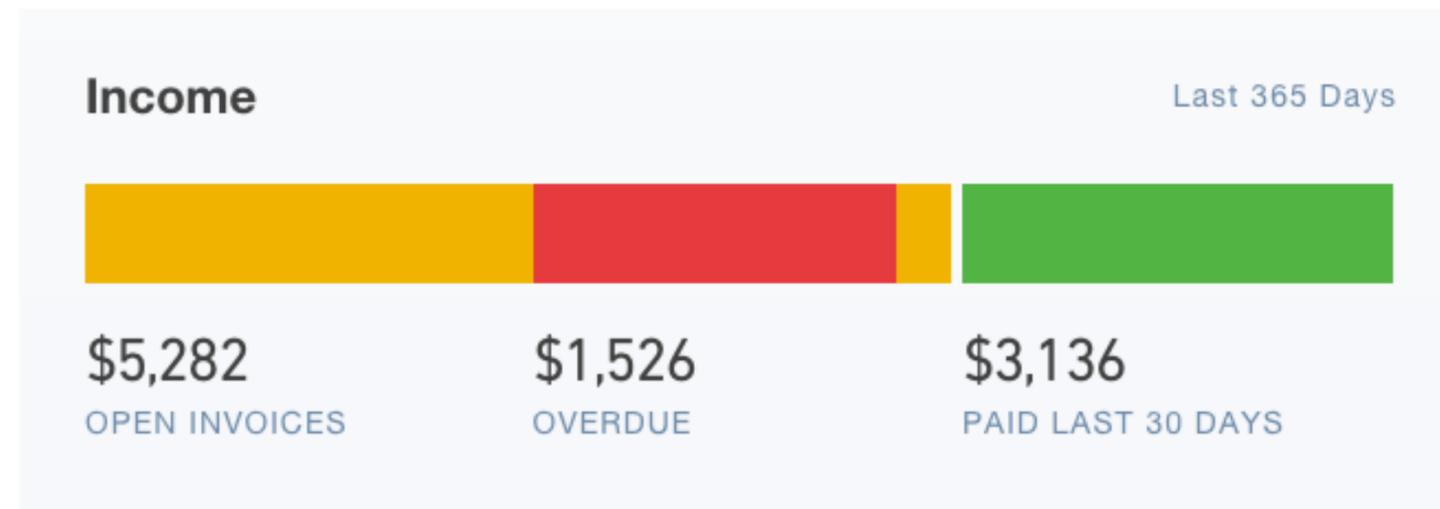
Paying employees with Intuit Payroll

Logo

Craig's Design and Landscaping Services

Wednesday, July 1 2015

Private mode OFF



- #### Bank accounts
- Checking** M
Bank balance
In QuickBooks
 - Savings** M
Bank balance
In QuickBooks
 - Mastercard** M
Bank balance
In QuickBooks
 - Visa**
In QuickBooks

[Connect another](#)

- #### Activities
- Needs at
 - QuickBooks fo user? [Read thi](#)
 - July 1, 20 TODAY**
 - [Take a tour of](#)
 - [Personalize O](#)

V1 TEST

One day to design

- Overall results showed that the test page did no harm to revenue compared to the existing solution.
- In qualitative testing, users said that they wouldn't mind if they were shown free content versus paid content (products and services) as long as the information was relevant to them.
- In contrast, in quantitative testing the one educational offering, "Home page tips", received about twice as many clicks on average as the other items.

- Home
- Customers
- Vendors
- Employees
- Transactions
- Reports
- Sales Tax
- Apps
- ★ More solutions

More solutions

Did you know QuickBooks does much more than accounting? Check out all the ways we can support your business.

Get more done, faster



Got unpaid invoices?

Get paid 2X faster and reduce bookkeeping work by accepting online payments.

[Learn more](#)



Order checks

Save time by printing checks exclusively designed for QuickBooks.

[Learn more](#)



On the go

Access QuickBooks anytime, anywhere with our free apps for iPad, iPhone, and Android.

[Learn more](#)

Take care of employees



Need workers' comp?

Protect your cash flow by paying premiums as you run payroll.

[Learn more](#)



Mobile time tracking

The QuickBooks integrated, GPS-enabled time tracker from TSheets makes payroll a snap.

[Learn more](#)

Be more productive



Home page tips

Discover 10 helpful tricks to be more productive on your QuickBooks homepage.

[Learn more](#)

V2 TEST

This iteration tested "store" (products and services) content only.

- I made each item shorter with descriptions and calls-to-action appearing on hover to fit more items above the fold.
- I added a badge to differentiate free items.

V2 performed better than V1 in terms of clicks, and early test results indicate that this page is worth more than \$3.5 million in incremental lifetime value above the existing solution.

- Home
- Customers
- Vendors
- Employees
- Transactions
- Reports
- Sales Tax
- Apps
- Do More
- Do More

Do More with QuickBooks

Did you know QuickBooks does much more than accounting?



Accept payments online



Order checks



Get easy financing

QuickBooks mobile apps
Our free mobile apps let you
access QuickBooks anywhere.

FREE

[Download now](#)



Get workers' comp



Buy labor law posters



FREE

Go mobile



FREE

Get the Mac app



Find an expert

V3 TEST

The final iteration tested layout to determine whether customers could quickly understand the distinction between "store" (products and services), educational (tips and tutorials), and promotional (time-based) content.



Home



Customers



Vendors



Employees



Transactions



Reports



Sales Tax



Apps



Do More

Do More with QuickBooks

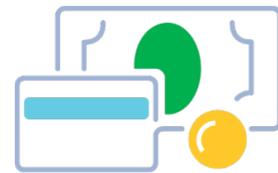
Featured

Products & Services

Tips & Articles

Products & Services

[View all >](#)



Accept payments online



Pay employees



Order checks



Tips & Articles

[View all >](#)



Paycheck calculator

Simply enter your employee's pay information, and we'll crunch the numbers. It's free!

[Calculate a paycheck](#)



25 ways to save cash for your business

Start saving cash each and every month by following these simple tips.

[Read article](#)

We're giving away a Big Game commercial



Do More with QuickBooks

Featured

Products & Services

Tips & Articles

From QuickBooks



Accept payments online



Pay employees



Order checks



Get mobile apps



Get easy financing



Get workers' comp







Home



Customers



Vendors



Employees



Transactions



Reports



Sales Tax



Apps



Do More

Do More with QuickBooks

Featured

Products & Services

Tips & Articles



Paycheck calculator

Simply enter your employee's pay information, and we'll crunch the numbers. It's free!

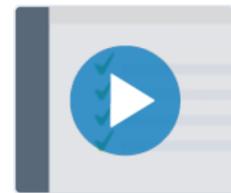
[Calculate a paycheck](#)



25 ways to save cash for your business

Start saving cash each and every month by following these simple tips.

[Read article](#)



Reconcile accounts in QuickBooks

Reconcile your accounts with confidence. This brief video shows you how.

[Watch video \(2:14\)](#)



Line of credit or traditional loan?

Learn the pros and cons of different types of funding to choose the right option for you.

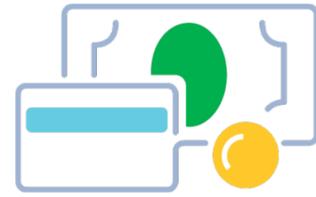
[Read article](#)

OTHER EXPLORATIONS

(not tested)

Do More with QuickBooks

Did you know QuickBooks does much more than accounting?



Online payments



Payroll done right



Secure checks

Game on. We're giving away a Big Game TV ad. >



Easy financing



Mobile time tracker

How to handle an owner purchase

Avoid these common accounting mistakes



Home



Customers



Vendors



Employees



Transactions



Reports



Sales Tax



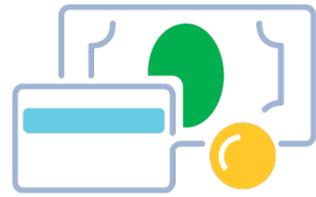
Apps



Do More

Do More with QuickBooks

Did you know QuickBooks does much more than accounting?



Online payments



Payroll done right



Secure checks



Easy financing



Mobile time tracker



Game on.
We're giving away a
Big Game TV ad.

QUICKBOOKS TIP
How to handle an
owner purchase

SMALL BUSINESS TIP
Avoid these common
accounting mistakes

OTHER EXPLORATIONS



Home



Customers



Vendors



Employees



Transactions



Reports



Sales Tax



Apps



Do More

Do More with QuickBooks

Did you know QuickBooks does much more than accounting?



Get paid twice as fast

Sign up for QuickBooks Payments to accept credit card payments right from QuickBooks:

- Email invoices
- Reduce data entry
- Get paid everywhere

[Learn more](#)



Join the conversation

Connect with entrepreneurs like you to learn better ways to manage your employees, market your business, and more.

[Read more](#)



On the go **FREE**

Access QuickBooks any time any where with our apps for iPhone, iPad, and Android.

[Read more](#)



QuickBooks Connect

Take your business to the next level Nov 2-4, in San Jose.

[Read more](#)

OTHER EXPLORATIONS

Do More with QuickBooks

Did you know QuickBooks does much more than accounting? Check out all the ways we can support your business.



Got unpaid invoices?

Get paid 2X faster and reduce bookkeeping work by accepting online payments.

[Learn more](#)



Need workers' comp?

QuickBooks can pay your premiums automatically when running Payroll.

[Learn more](#)



Order checks

Save time by printing checks exclusively designed to work with QuickBooks.

[Learn more](#)



Get payroll done right

Protect yourself from costly tax penalties by letting QuickBooks handle your payroll.

[Learn more](#)



On the go **FREE**

Access QuickBooks anytime, anywhere with our free apps for iPad, iPhone, and Android.

[Learn more](#)



Quick and easy funding

QuickBooks can help businesses like yours get the funding they need to keep growing.

[Learn more](#)

www.sarahbeaver.com