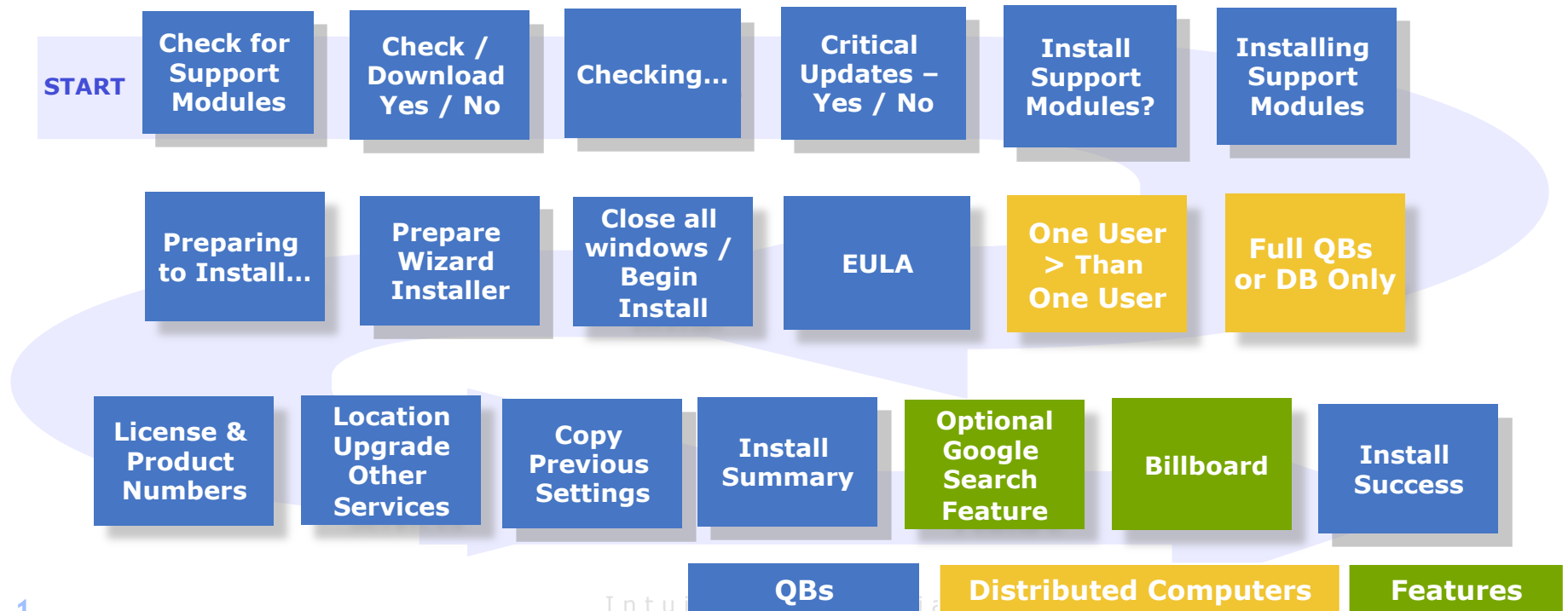


Current Installation Experience

Users must answer questions without adequate context, which leaves them confused and unsure they made the correct choices.

Task: Install QuickBooks
Time: Each support call is a little over an hour = install time
Cost: 60min. x \$.50 = approx. \$30 per call



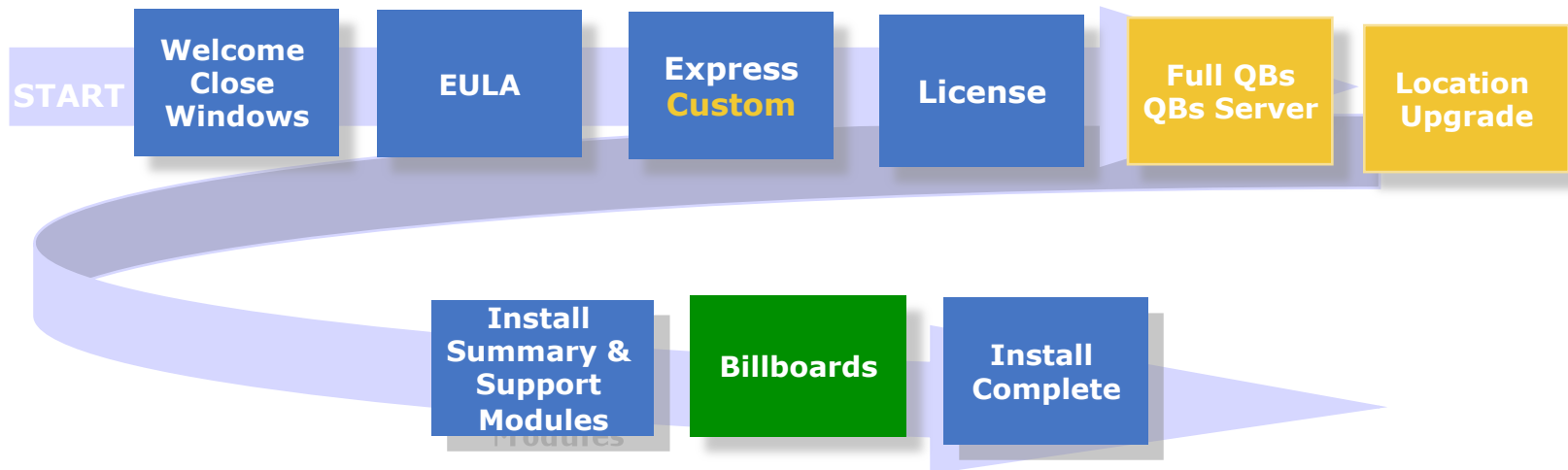
Design Goals

- **Save Time**
 - **Provide the user with simplest installation experience possible**
 - **Prompt the user with clear options that get them into the installation right for their business**
- **Remove confusing questions about multi-user/network set**

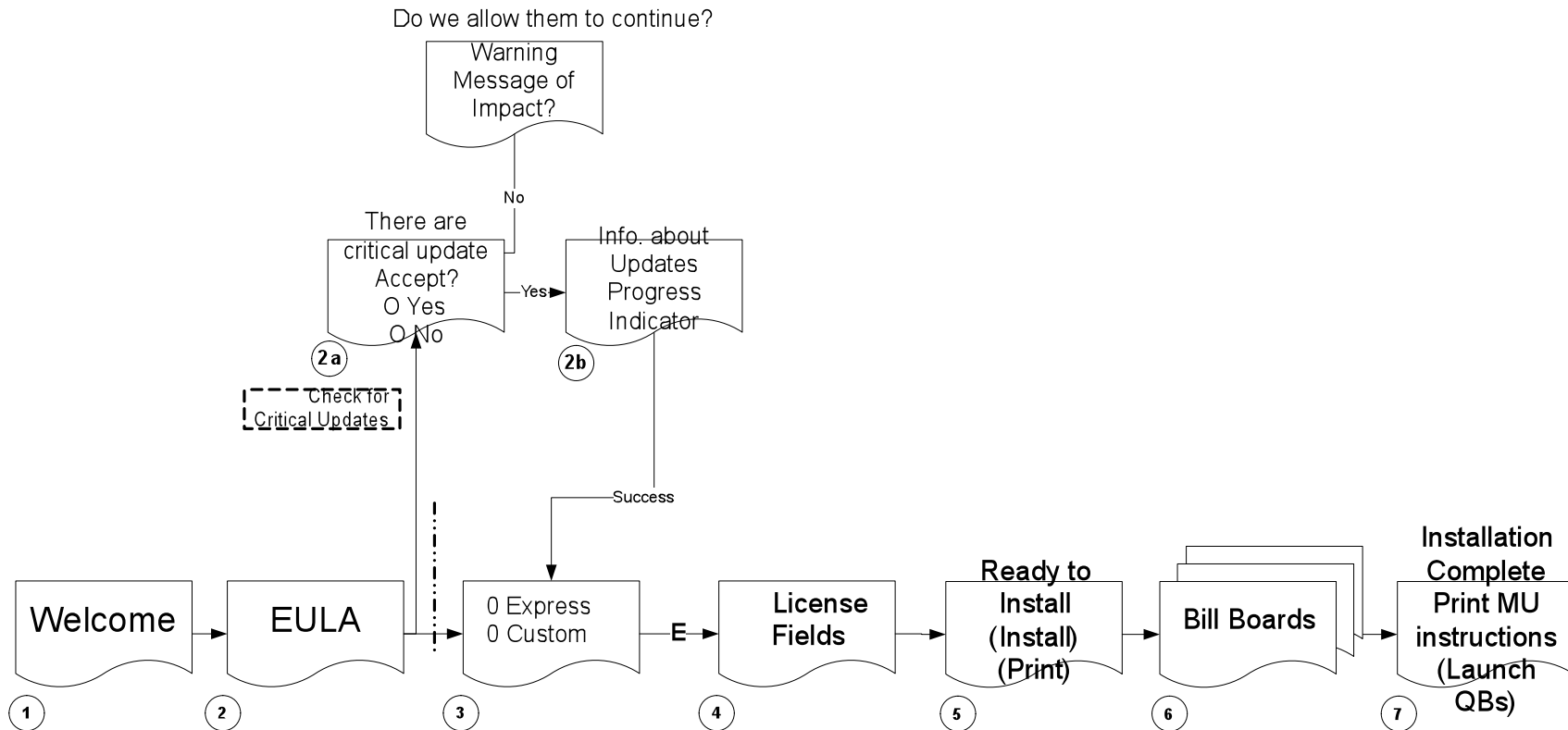
Installation Experience Combined Express & Custom

Increase confidence, save time, and simplify the install process by eliminating misleading questions and unnecessary screens.

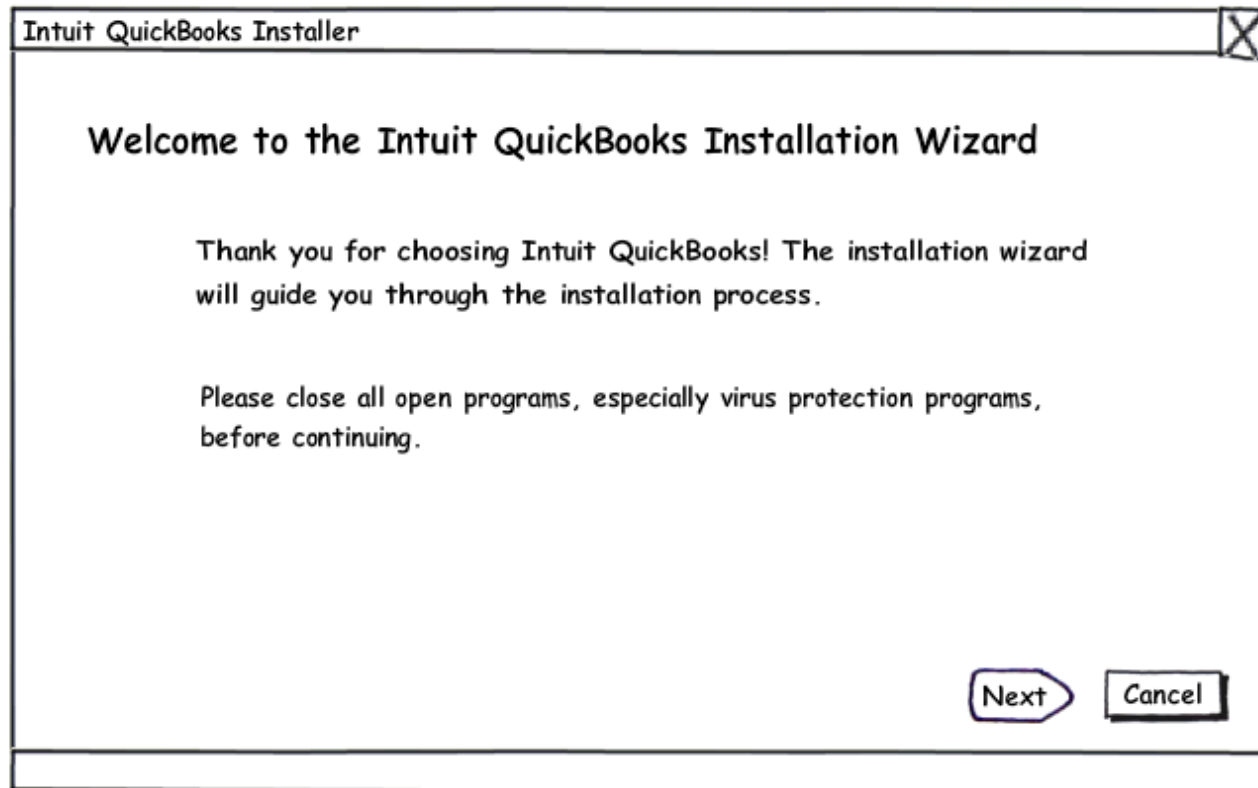
Task: Install QuickBooks
New Time: Goal – Reduce installation time by 25%
New Cost: Goal – Reduce number of support calls by 50%



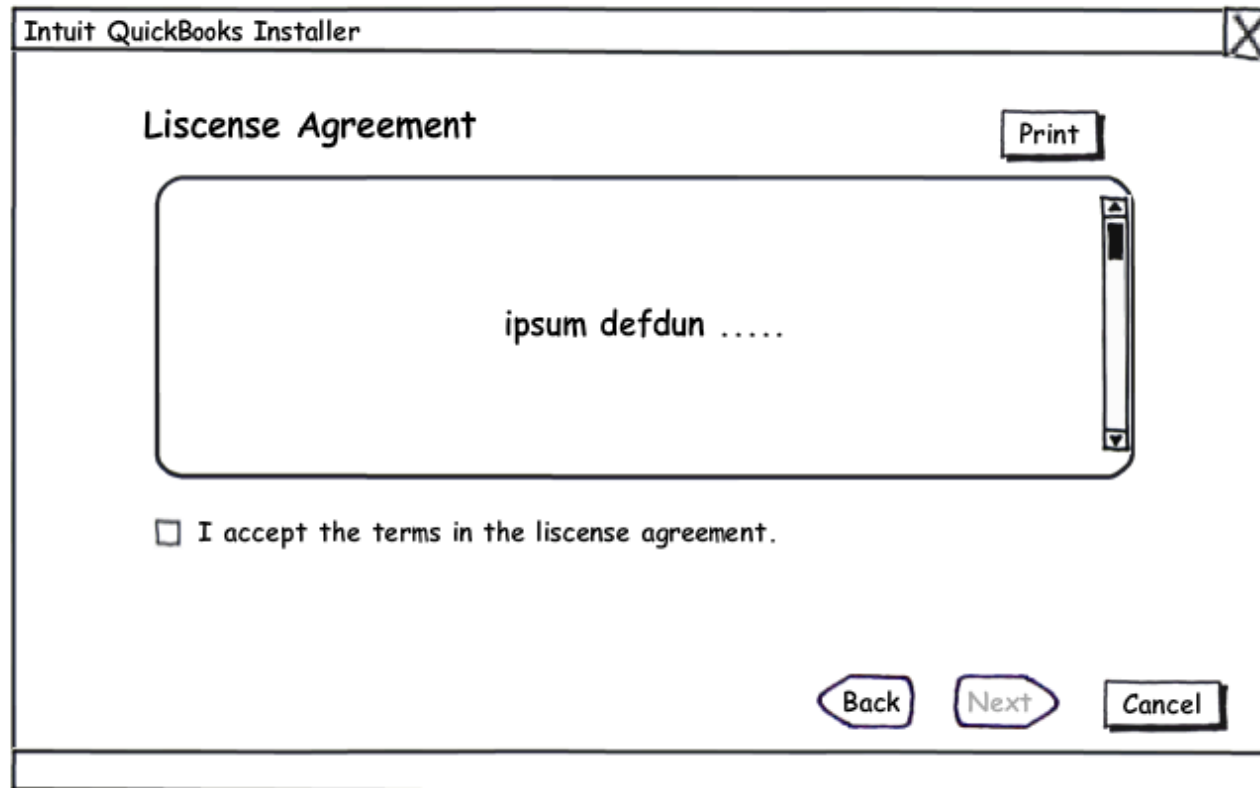
Proposed UX Flow – Express



Welcome ¹

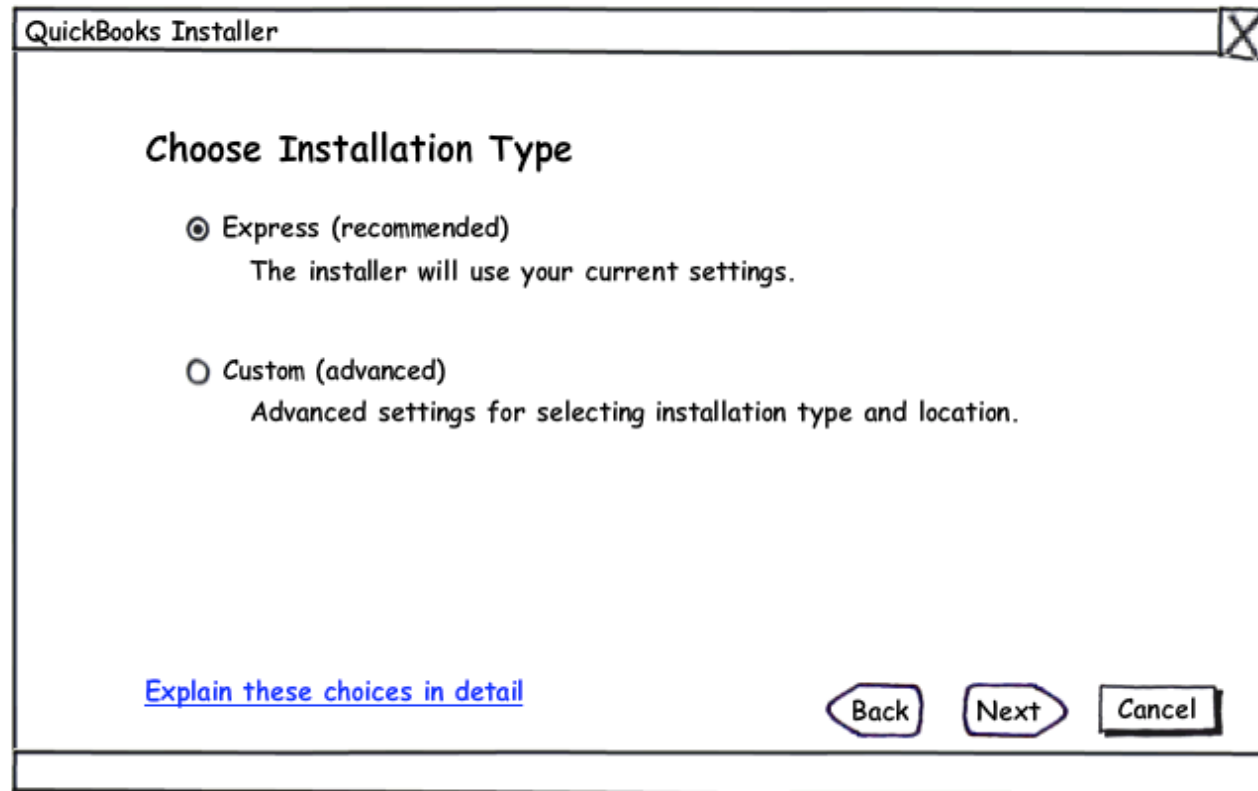


EULA²



Critical Updates Flow³

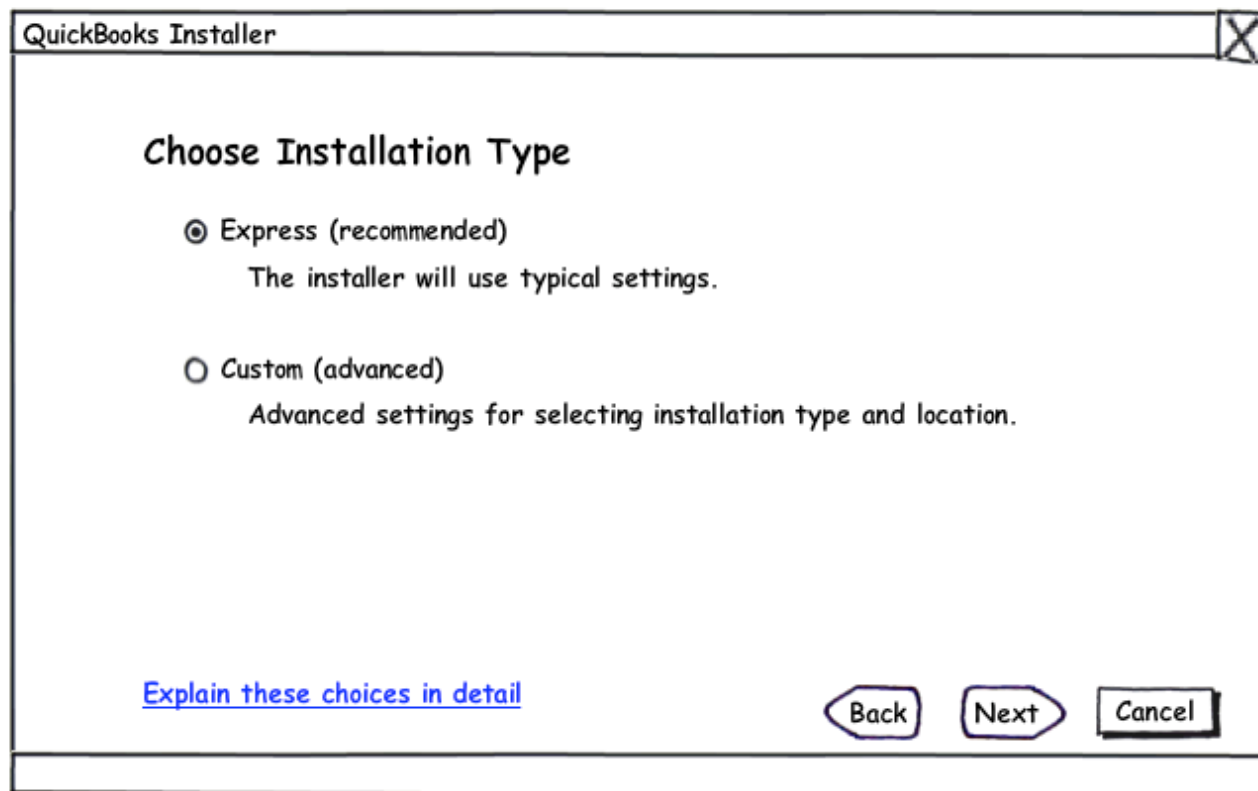
Proposed Solution Choose Install Type Existing User



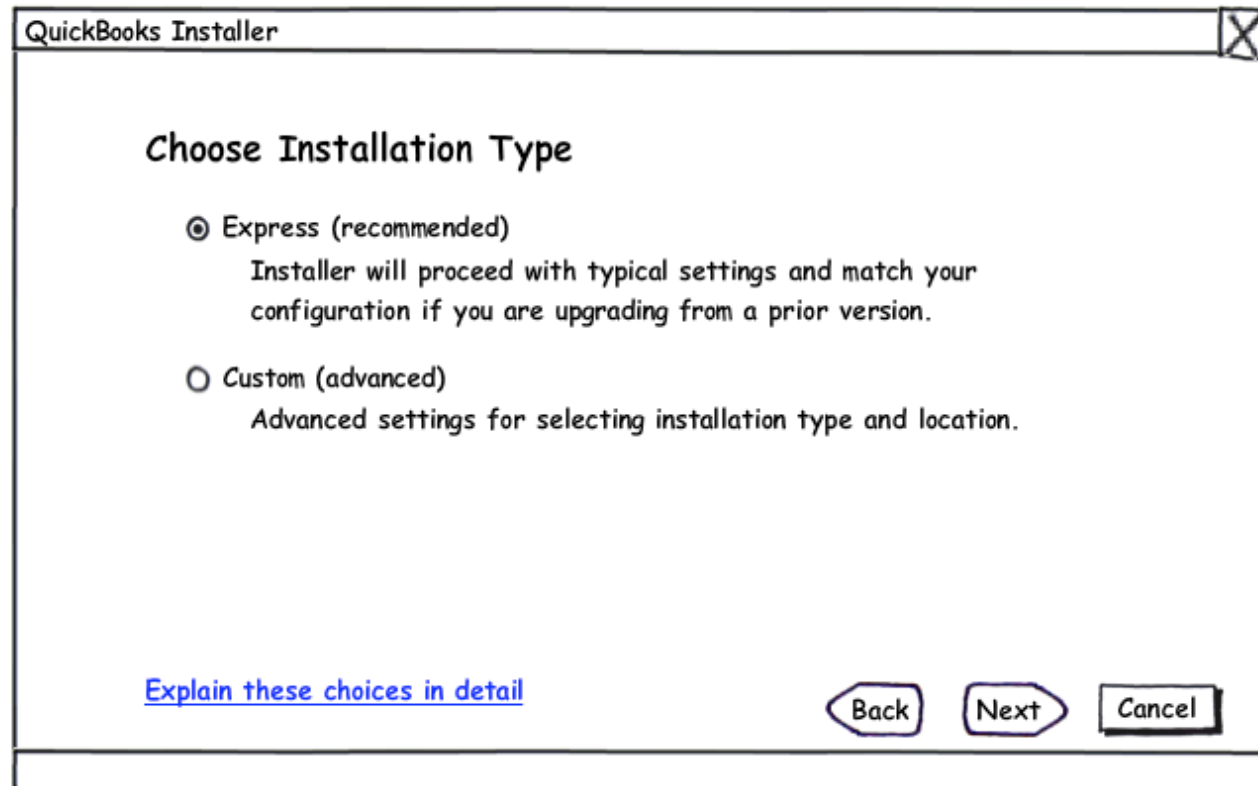
Since the IM can detect if there is an installation. Recommendation to provide two instances – existing user and new use – in friendly/non-technical language.

Proposed Solution Choose Install Type New User

3



Choose Install Type ³




Express, when new and existing user combined,
too complicated and technical.

Product & License Numbers ⁴

Intuit QuickBooks Installer

Enter the License Number and Product Code
You can find these numbers on a sticker on the CD cover or in your download confirmation email.



License

23 234 23 546

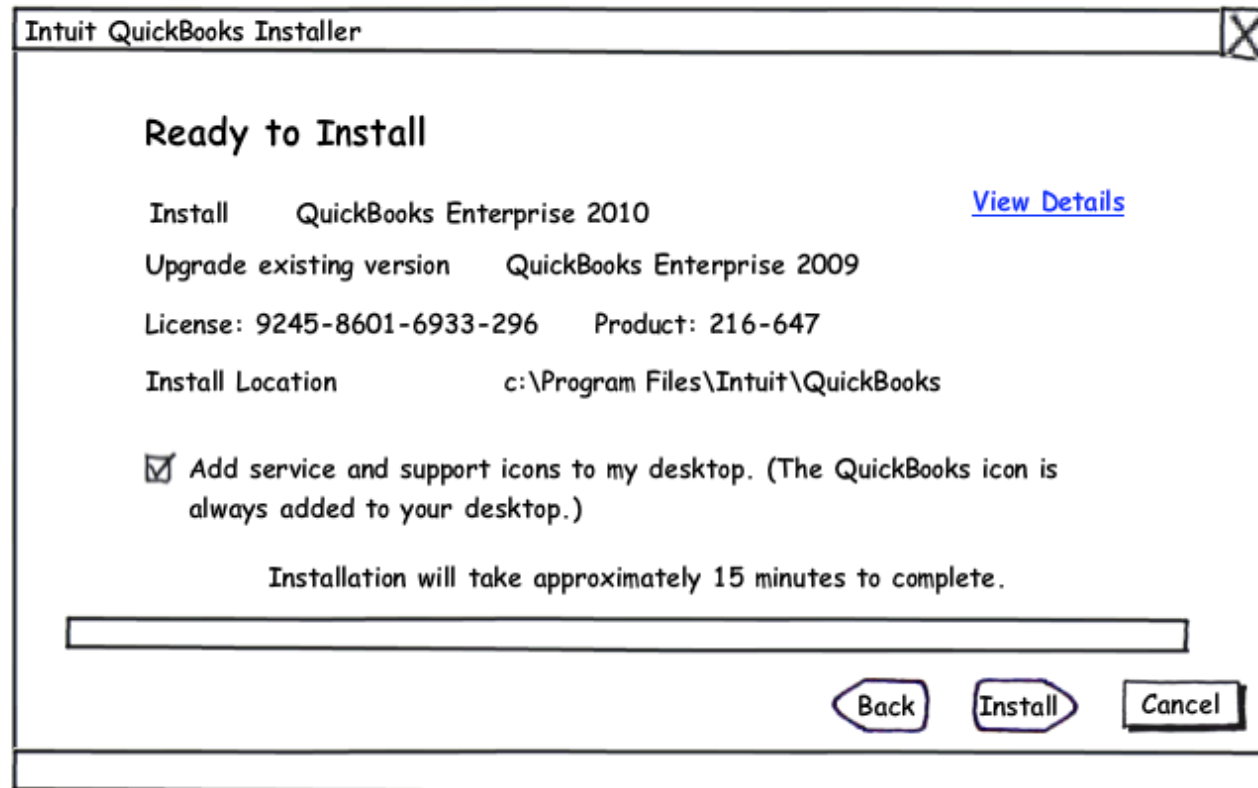
Product

xx xxx

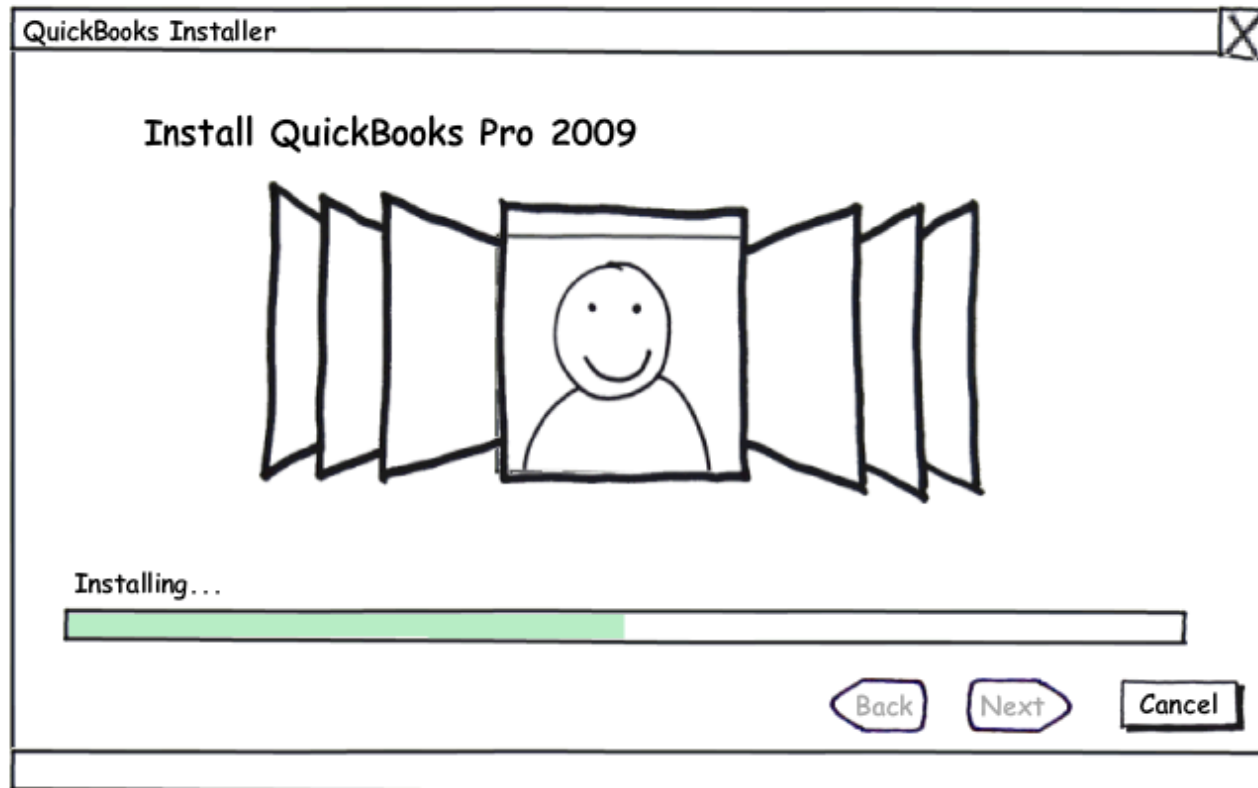
[Find existing or get new license/product numbers](#)

Back Next Cancel

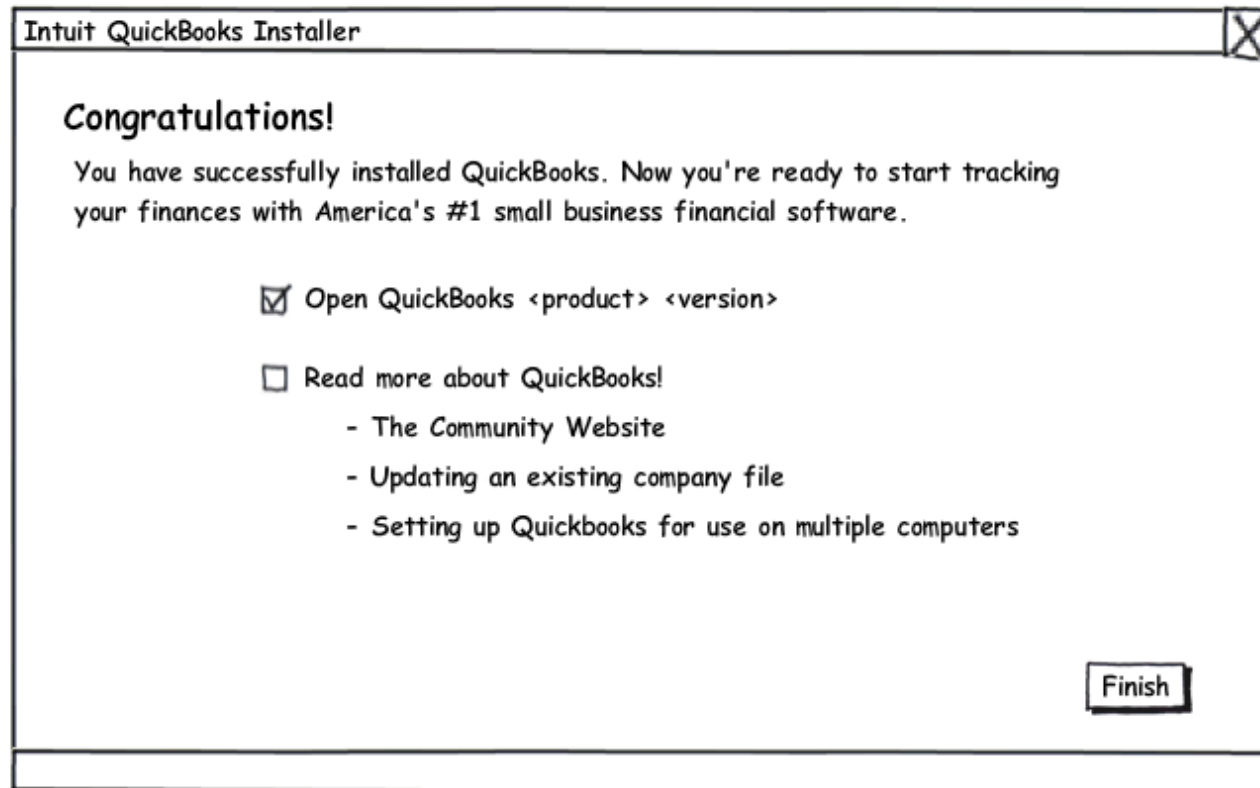
Ready to Install ⁵



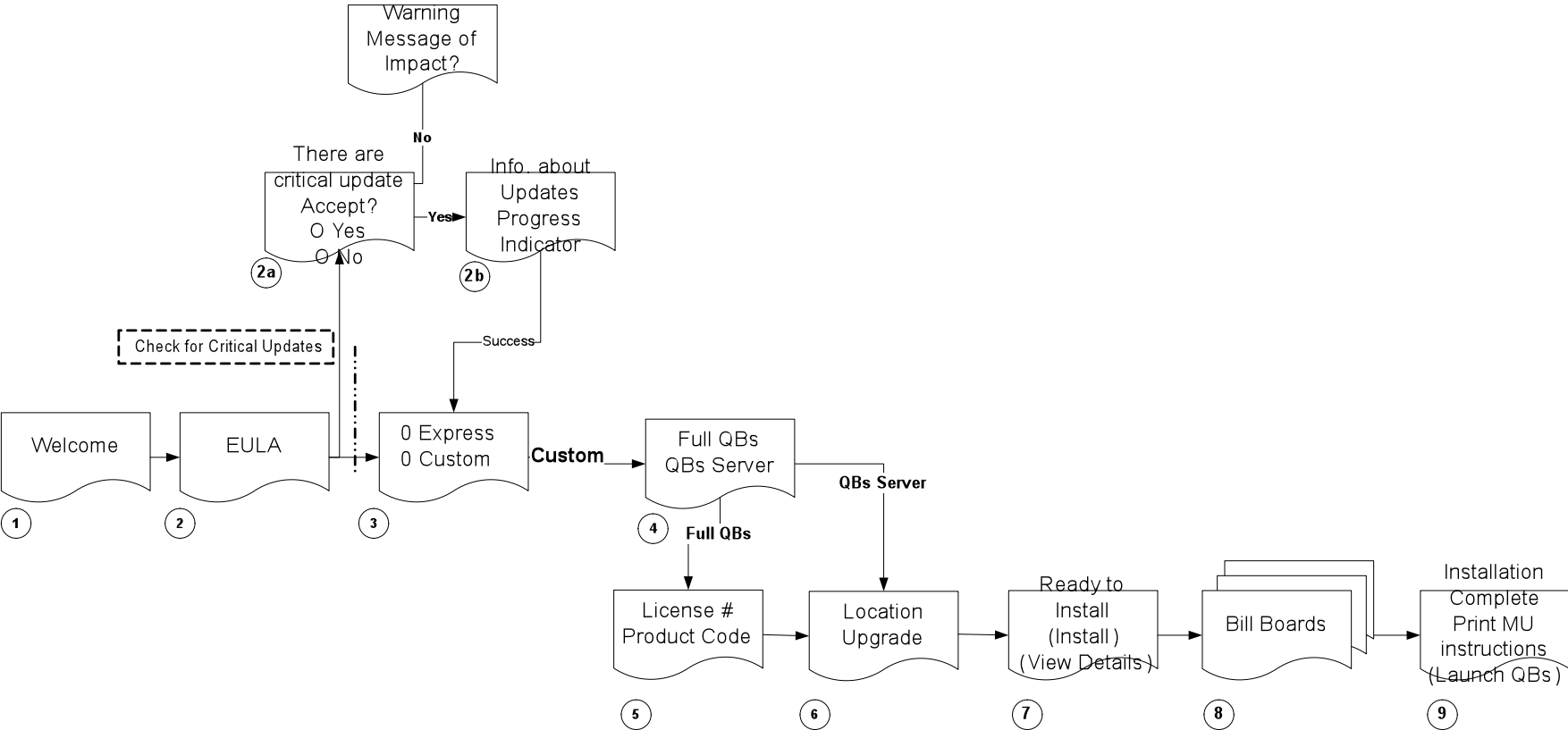
Bill Boards - Installing ⁶



Installation Completed Successfully⁷

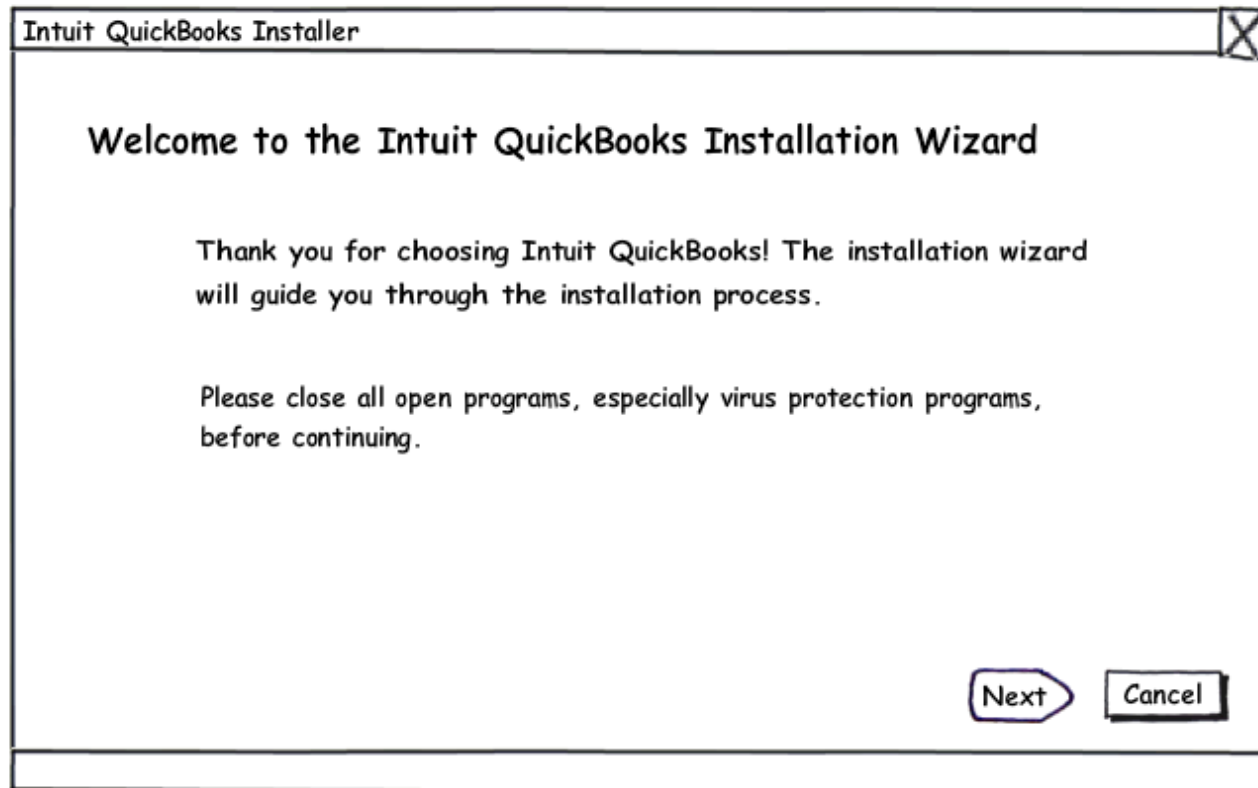


Functional Flow: Custom

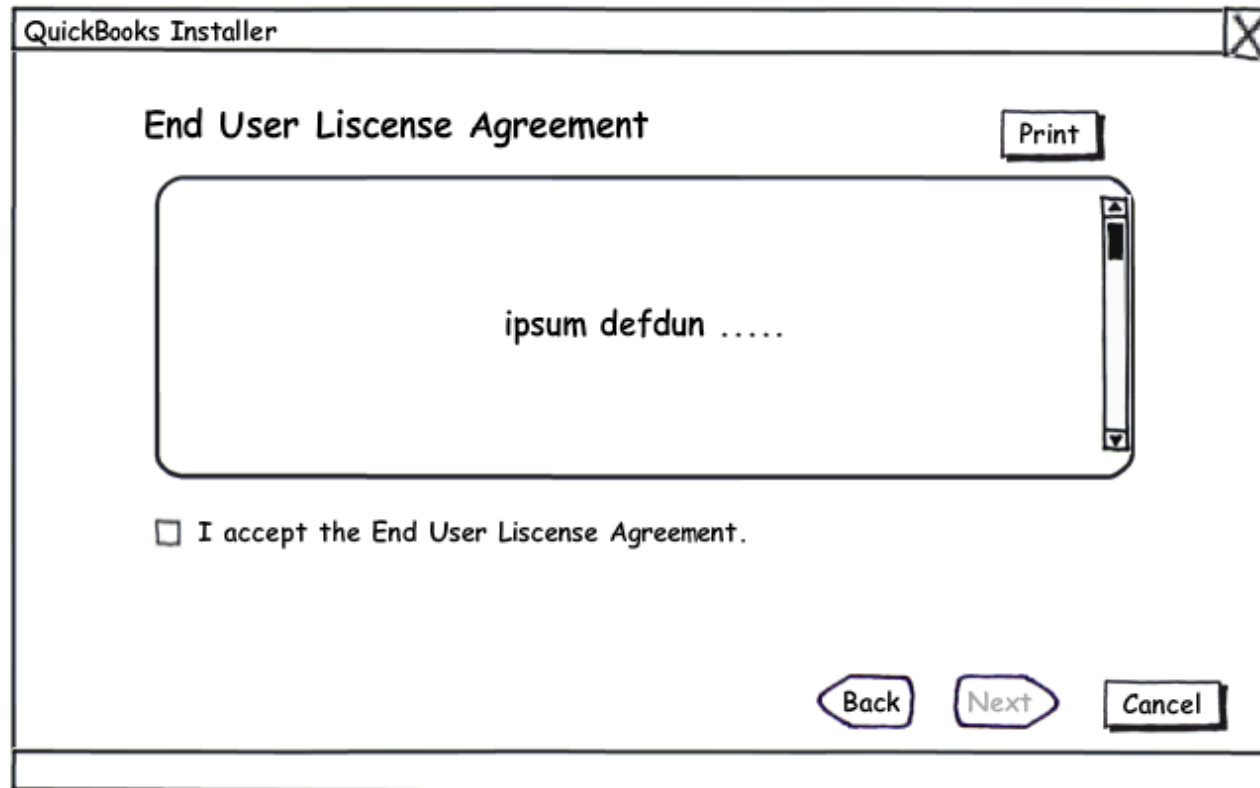


Welcome¹

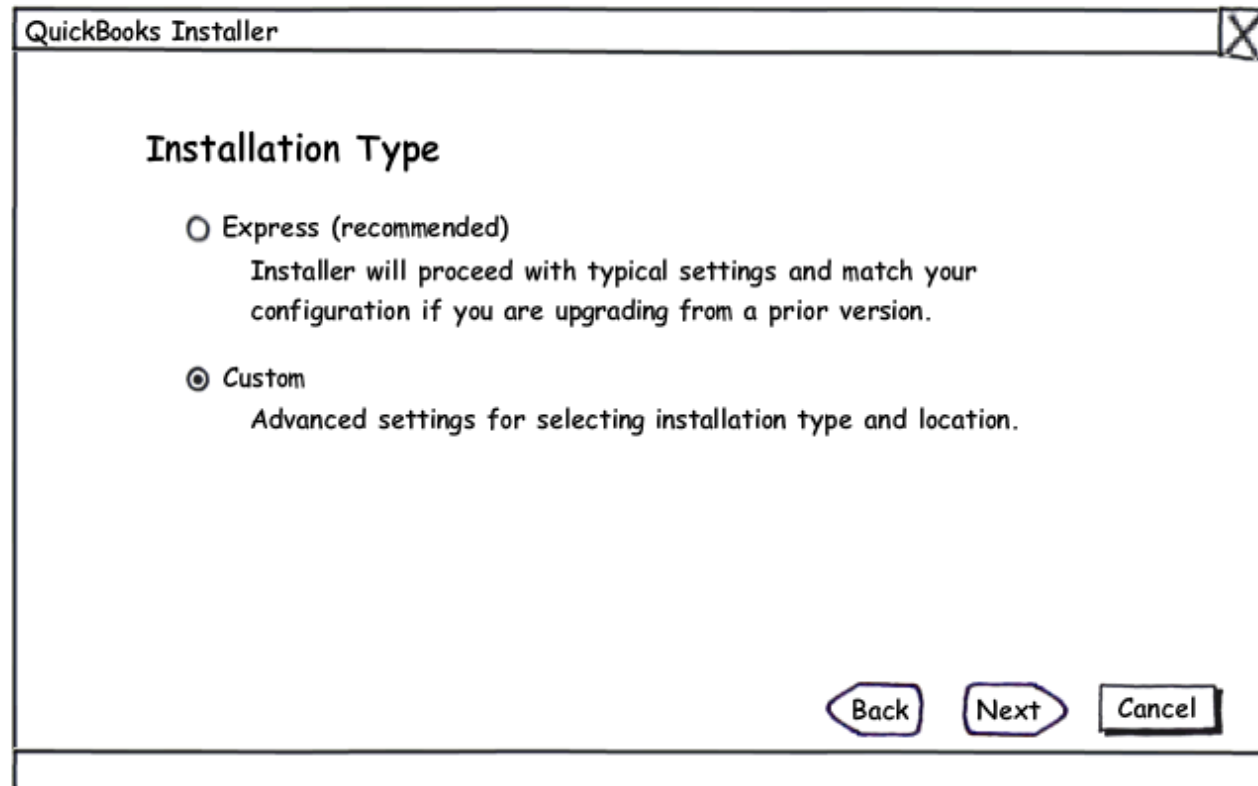
(Full QBs)



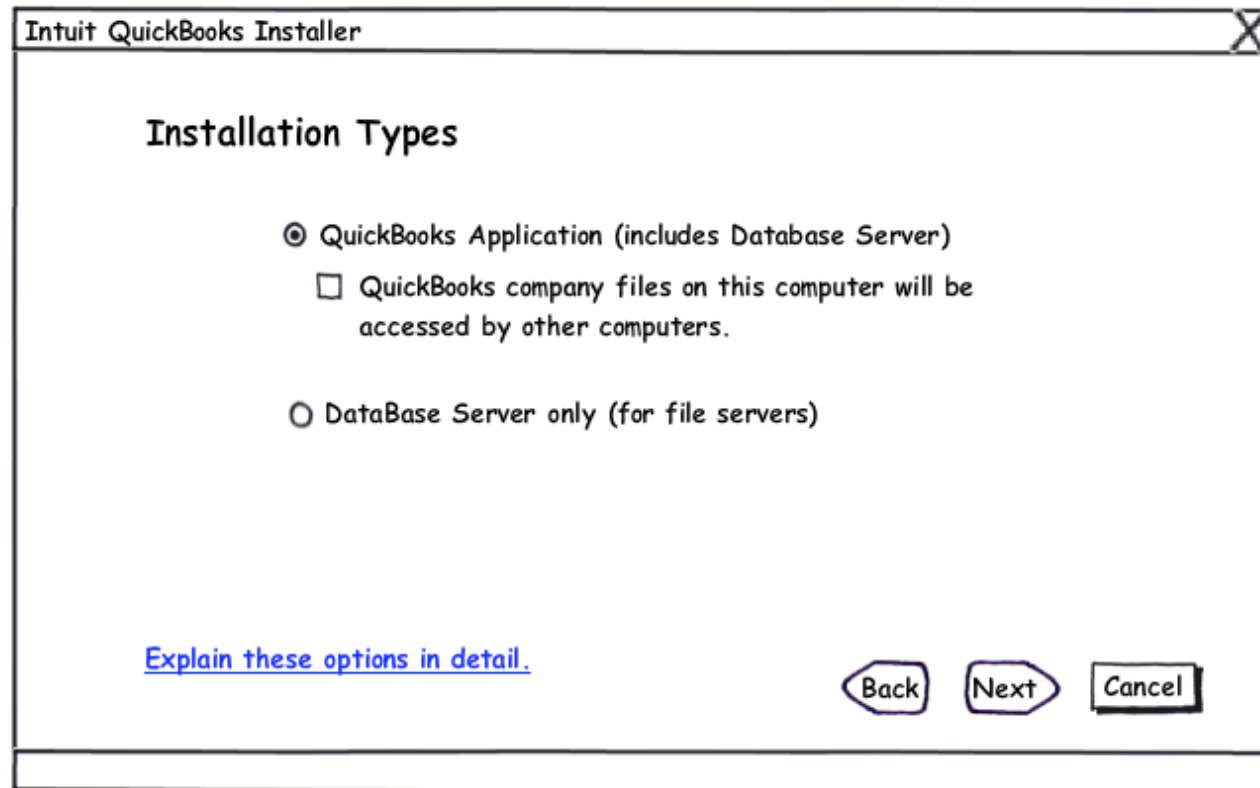
EULA²



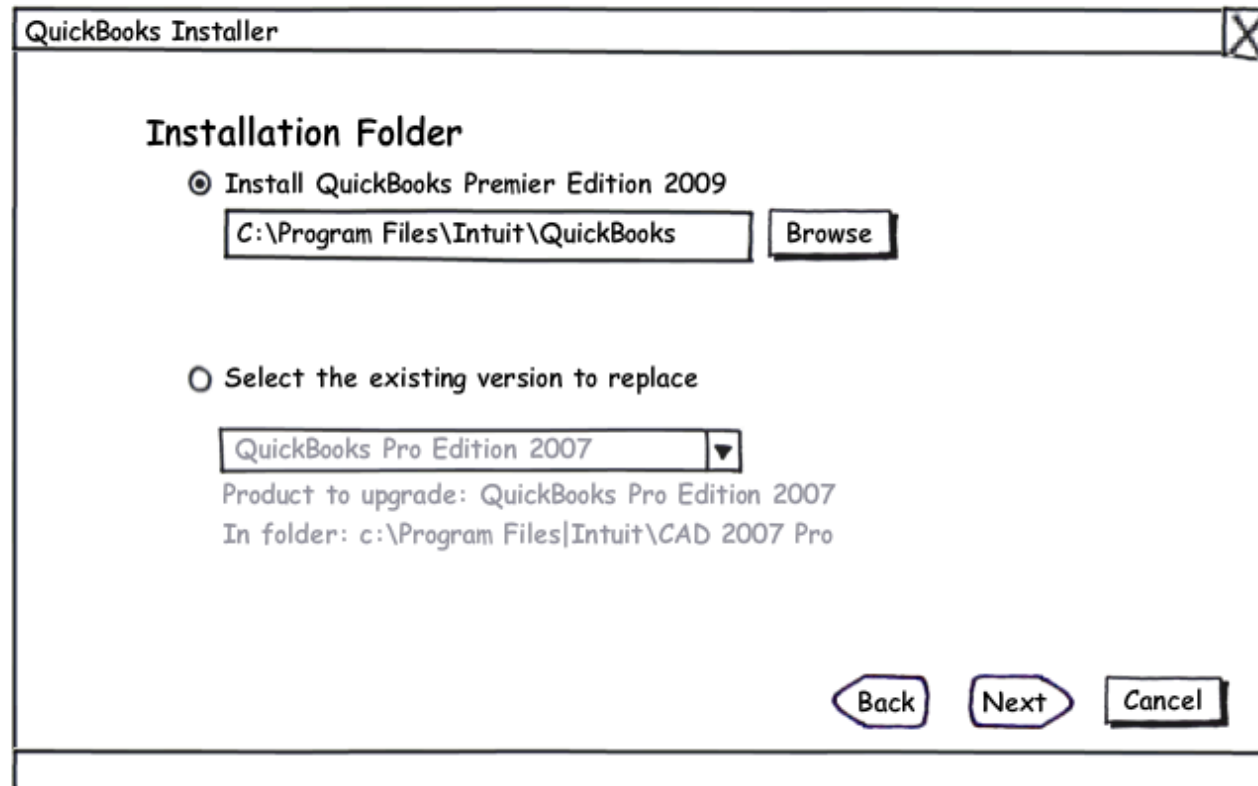
Choose Install Type ³



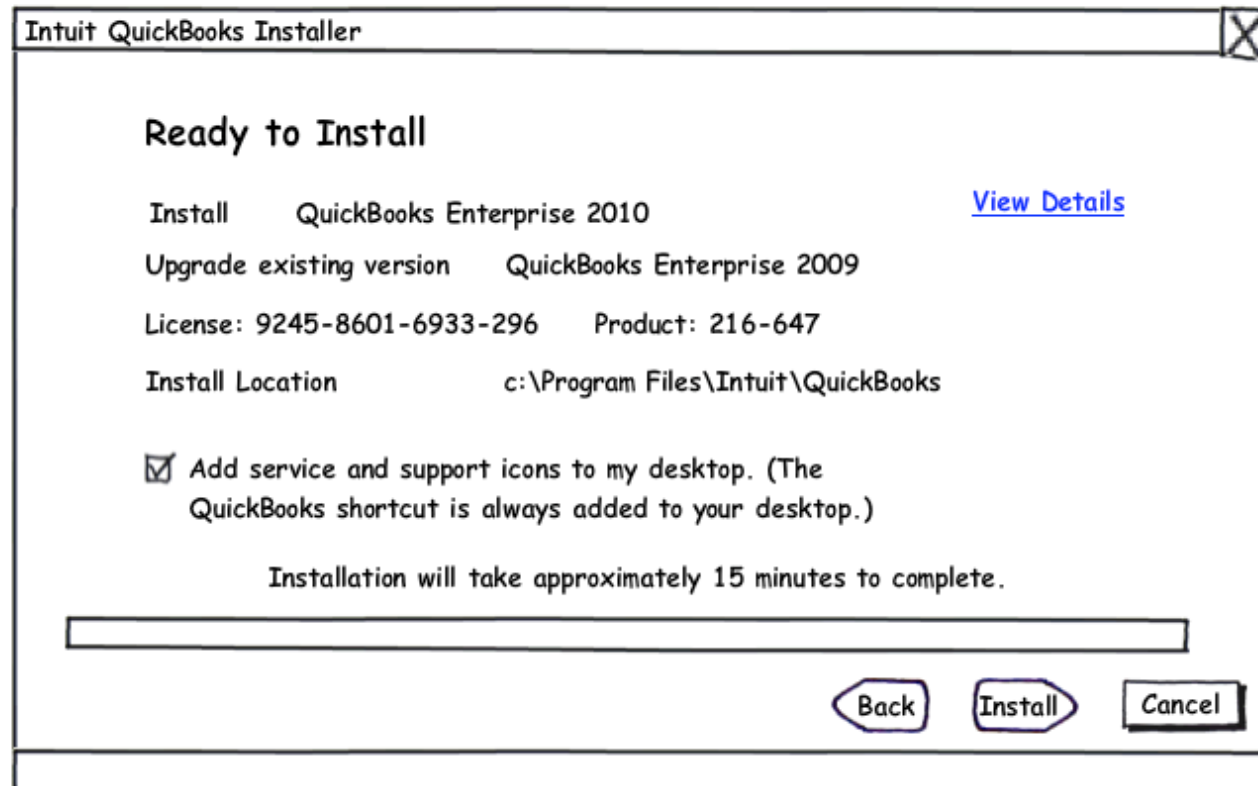
Distributed Computing Options ⁴



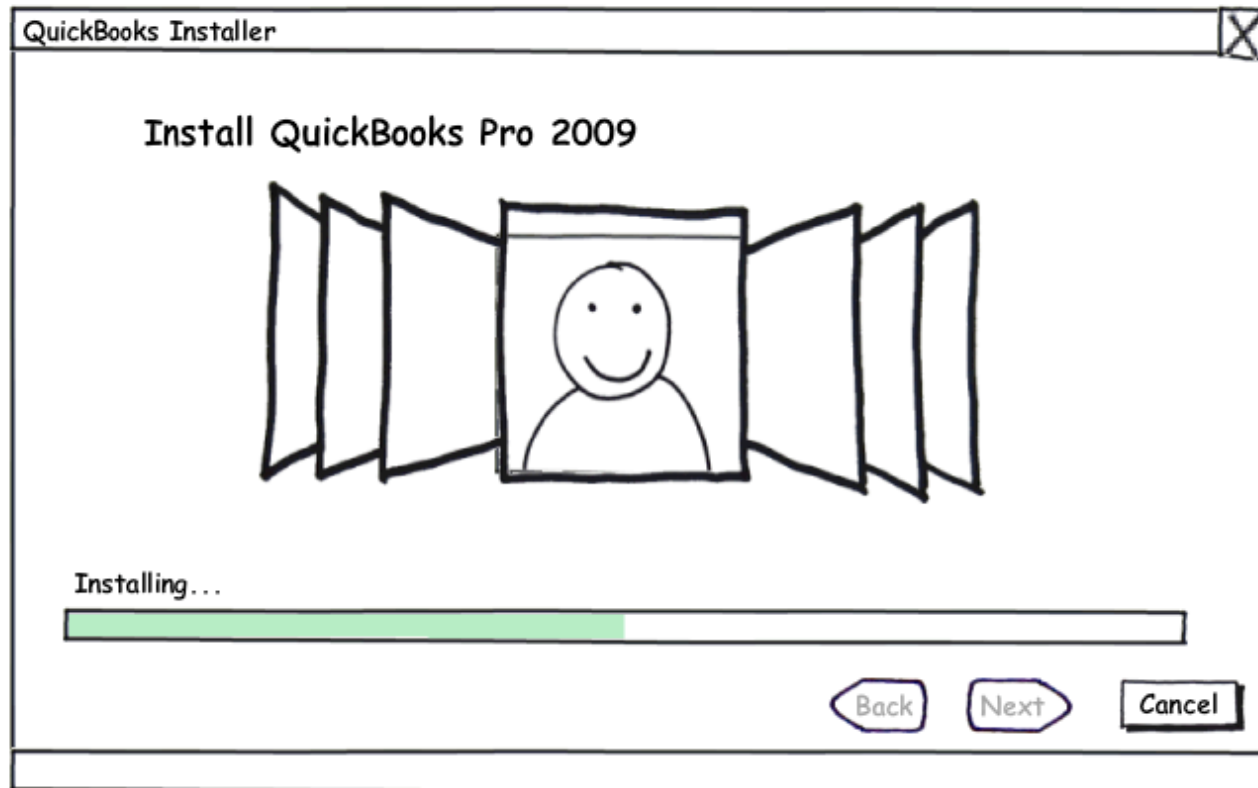
Location & Upgrade ⁵



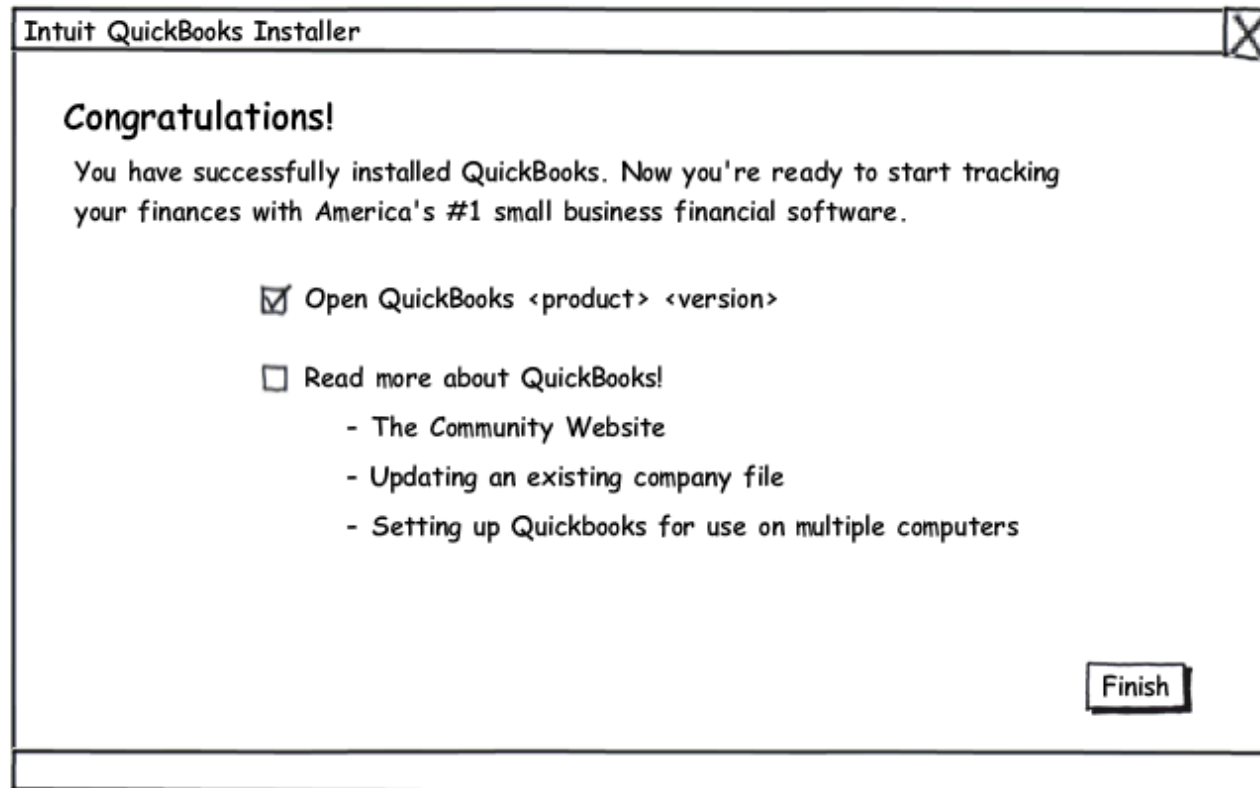
Ready to Install⁶



Bill Boards - Installing ⁷



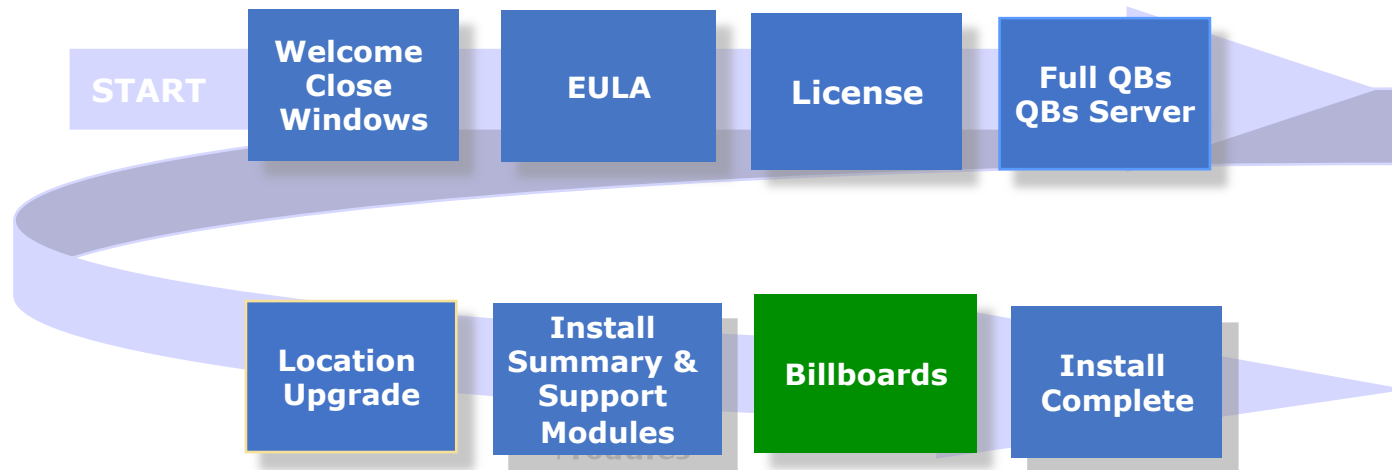
Installation Completed Successfully⁸



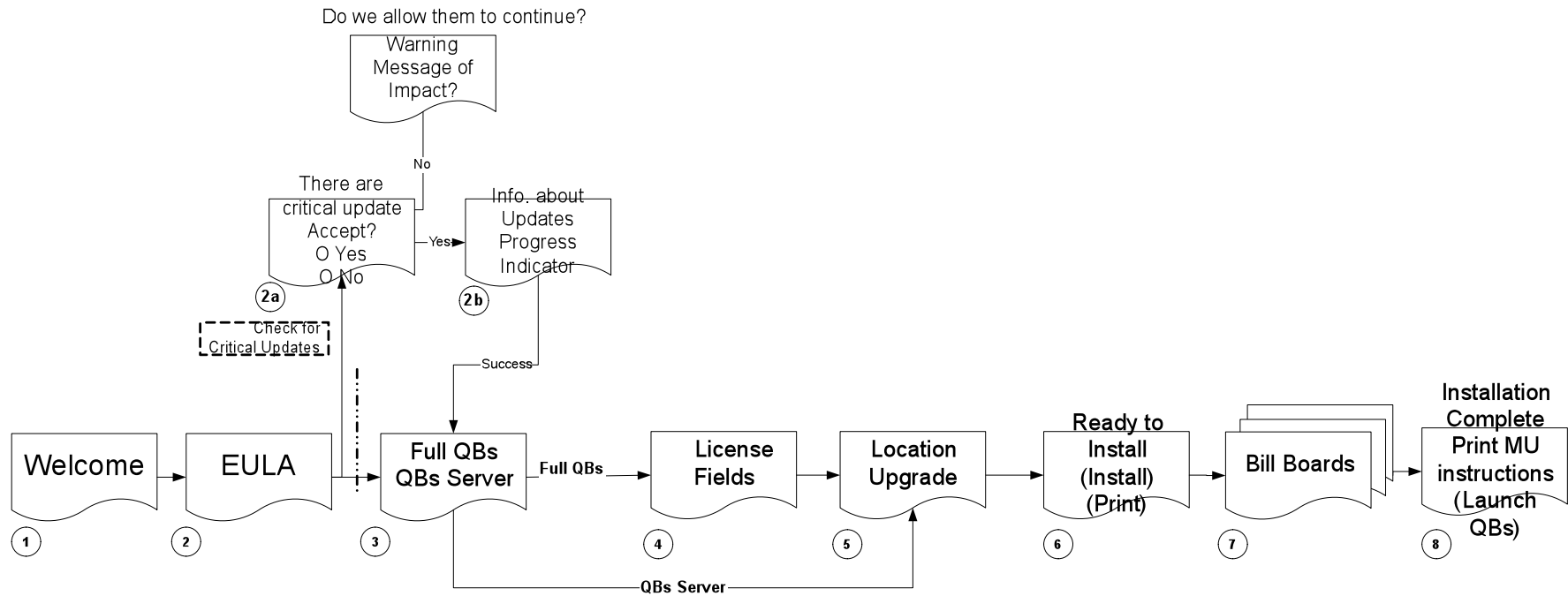
Installation Experience Enterprise - MMG

Increase confidence, save time, and simplify the install process by eliminating misleading questions and unnecessary screens.

Task: Install QuickBooks
New Time: Goal – Reduce installation time by 25%
New Cost: Goal – Reduce number of support calls by 505

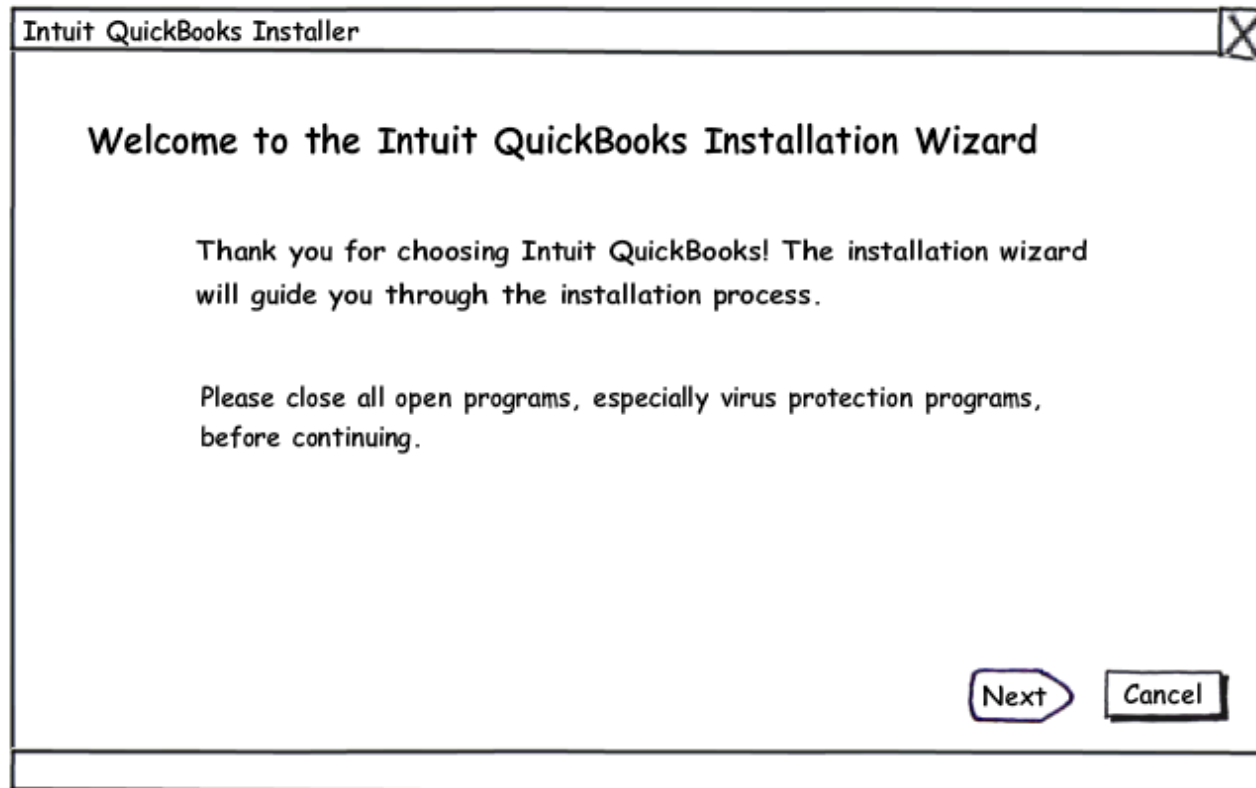


Functional Flow: Enterprise (MMG)

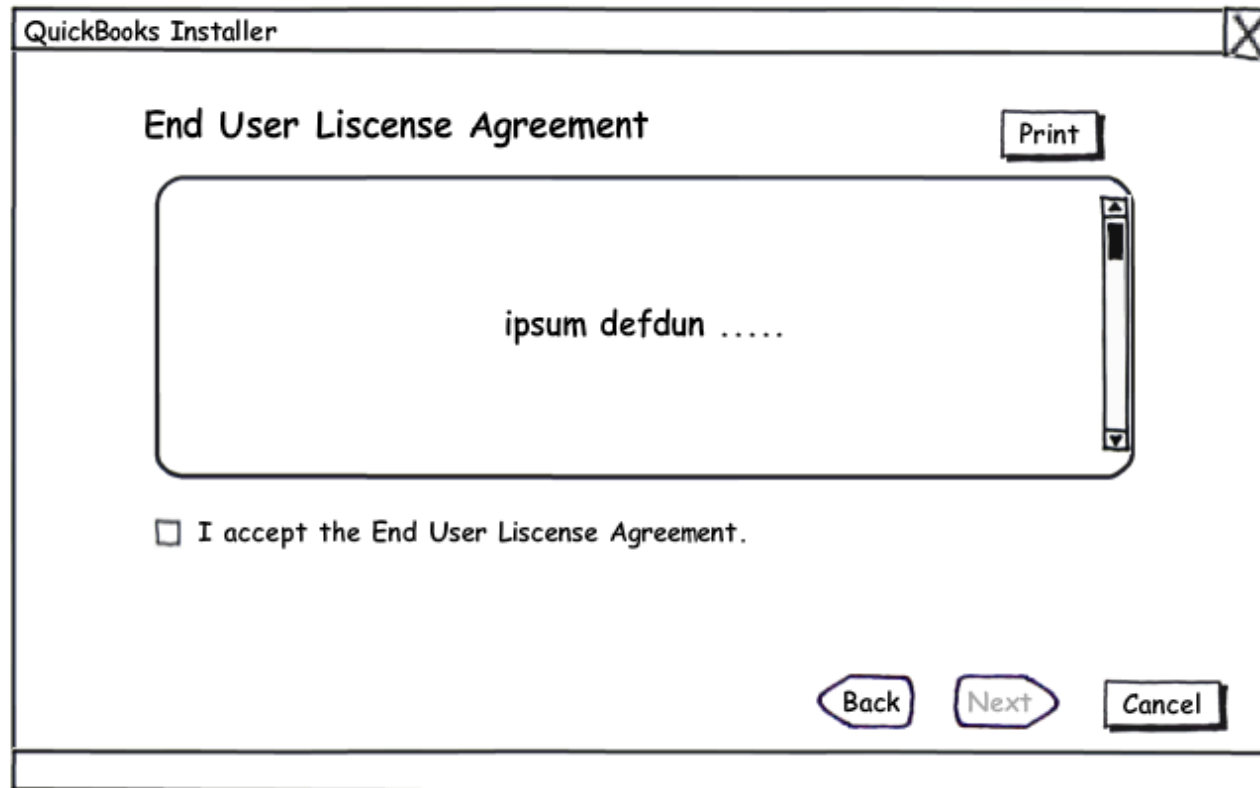


Welcome¹

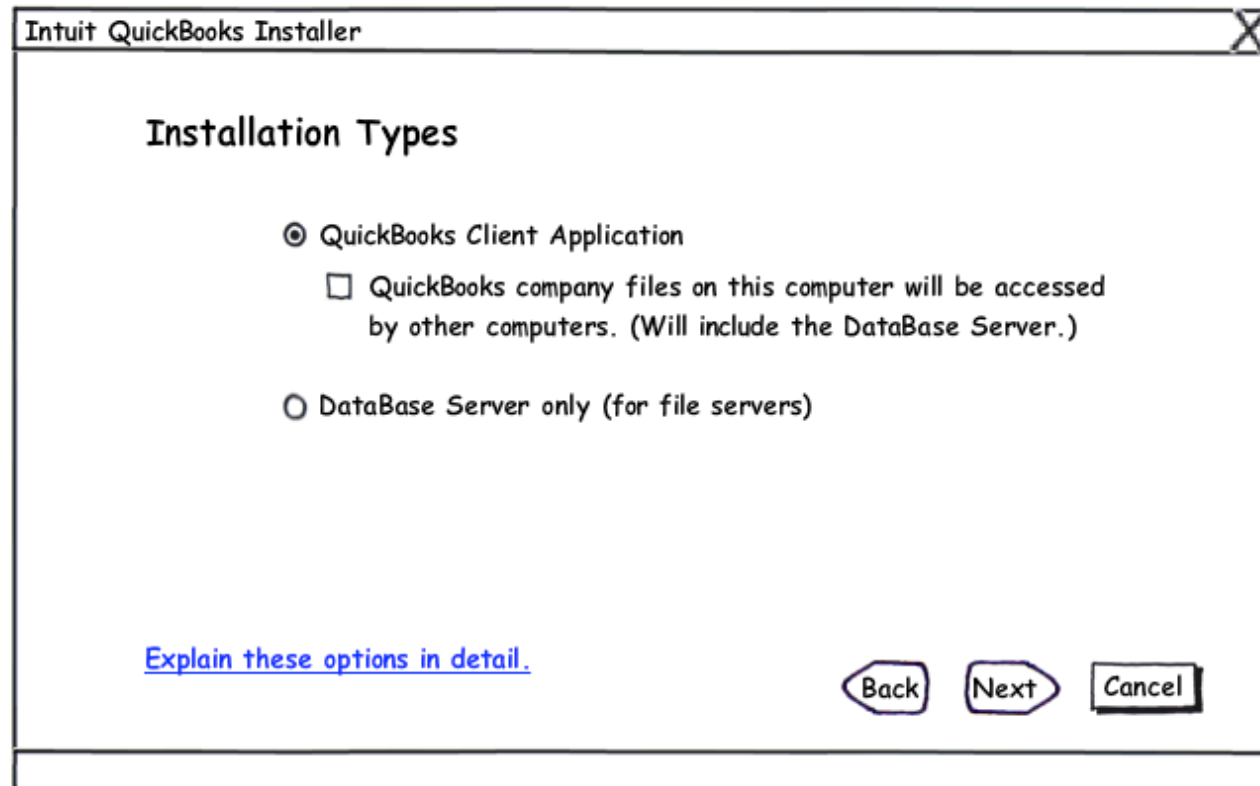
(Full QBs)



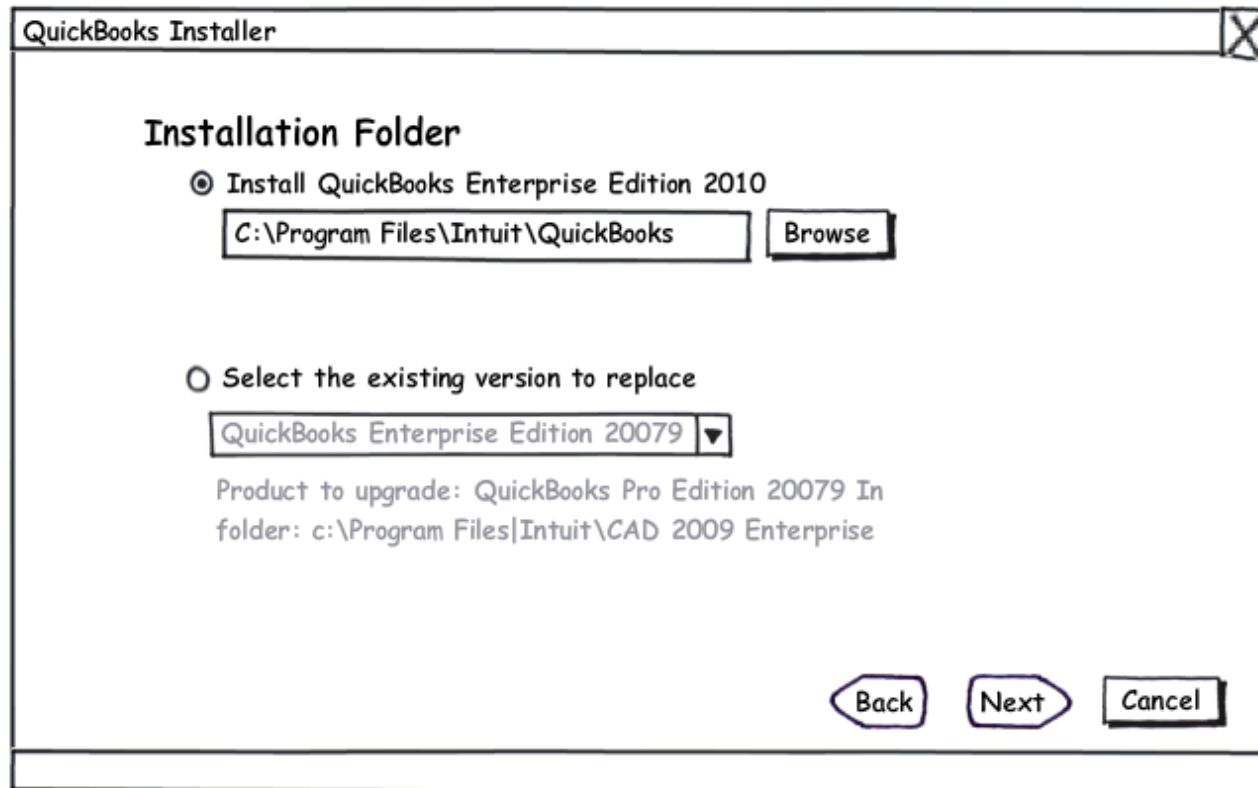
EULA²



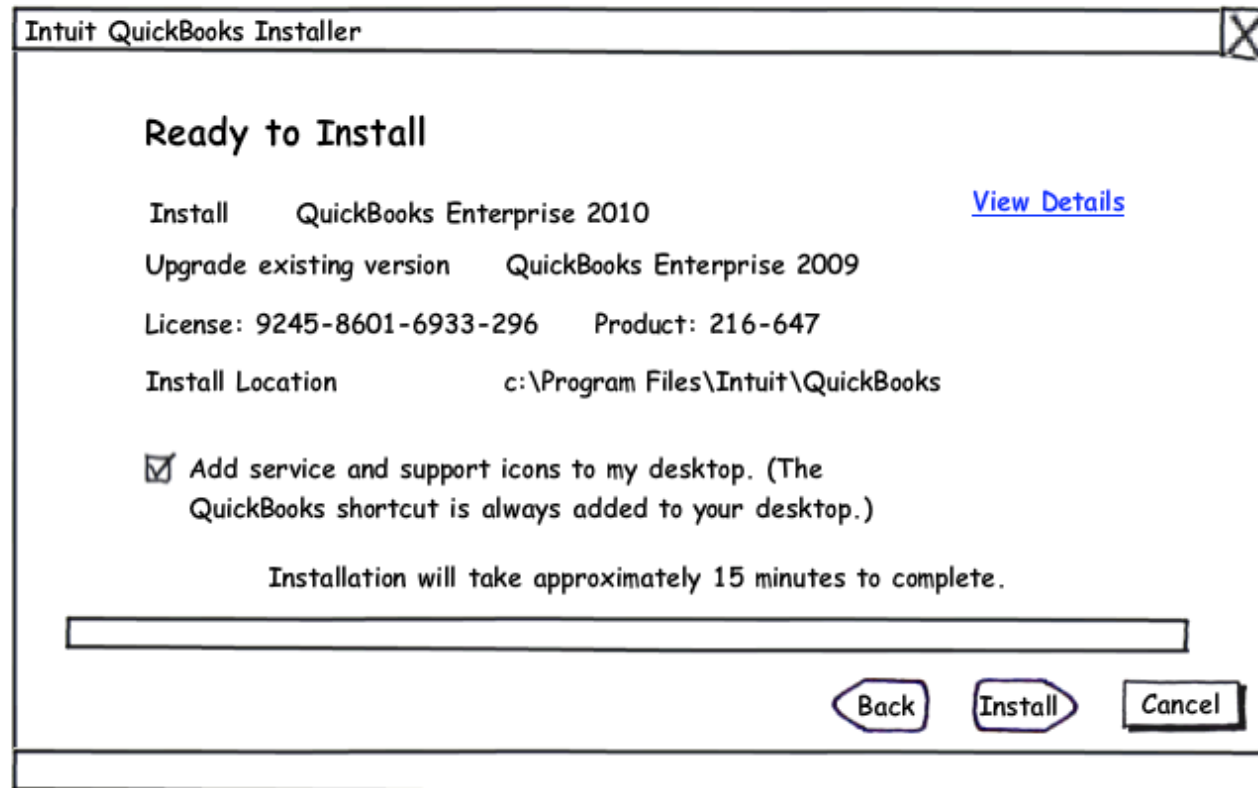
Installation Options ³



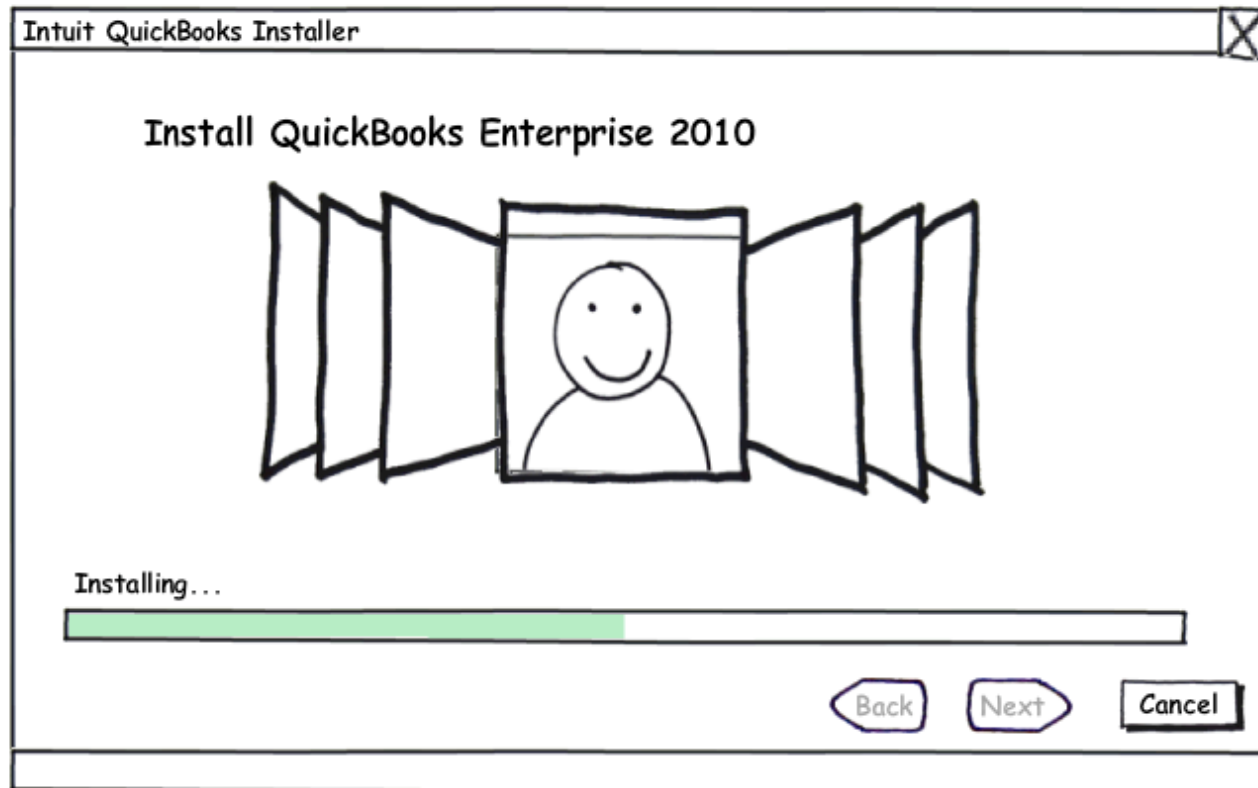
Location & Upgrade⁴



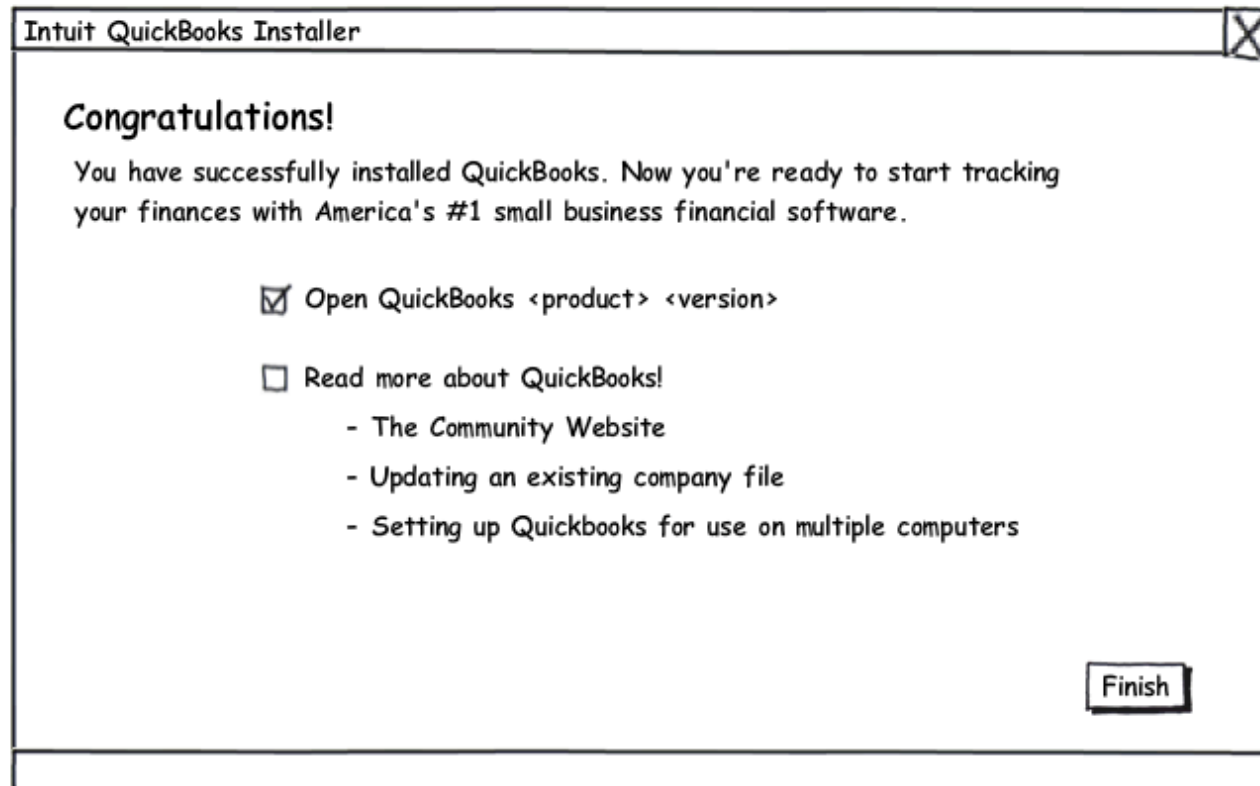
Ready to Install⁵



Bill Boards - Installing ⁶



Installation Completed Successfully⁷



Schedule

- Research scheduled for the week of April 20th
- Draft of text for Welcome and Complete from CP2 – 4-3-09
- Visual Design-Draft for test April 15th
- UI Text – Draft for test April 15th
- Functional Flow Freeze May 1st (Better by April 24th to get into Alpha)
- Main UI design freeze June 5th
- Place holders (size and format final) graphics and billboards June 20th
- Full UI freeze June 25th
- Final graphics EULA and billboards August 8th

Call Data

- **Confusion around install process, best practices, and multiple installs**
 - "I just purchased 2009 I need to install on additional computers"
 - "I am having an issue installing my 3 user Pro 2009."
 - **"NEED HELP INSTALLING QUICKBOOKS ON MULTI COMPUTERS"**
 - "I just bought 2009 premier and need help installing"
- **Confusion around Multi-User scenarios**
 - "need to install quickbooks on a server and 3 work stations.. Need help to setup networking"
 - "On my second computer for user #2 I installed the software and the when I tried to open Quickbooks I can't get open up my company. I had 2006 Quickbooks and after installlation on the server it is working fine. I had a network set up with 2006and it was working fine. . we di dremoet access.....was helping outhe disconnted the call."
 - **"How do I install QuickBooks 2009 to my computers so that we can work on the company file at the same times."**
- **Questions around how to handle installing side by side vs. upgrade.**
 - "He wanted to install quickbooks 2009 seprate from quickbooks 2005"
 - "How do I install Quickbooks 2009 without affecting my current product"
 - **"I am installing an upgrade. I have some questions about the best way to proceed."**
- **Previous experiences with install have led customers to call before attempting on their own.**
 - "I just purchased 2009 and need help installing and converting from 2007 without loosing any data"
 - "Need to install quickbooks on 3 computers and need help bringing my data over "
 - **"I want help installing and converting to 2009... had trouble with 2008"**

Call Data Summary

Venti Focus: In V1, we are taking steps to fix 4 of these top call drivers

Out of 50686 total contacts, install makes up 5086 of the total. This equates to approximately 10% of the overall call volume. Of that 10% there are 3 major buckets (Basic 'How do I's' and Hand holding | Multi-User | Upgrade vs. Side by Side) that account for 4.35% of the overall install bucket.

Install Manager would begin to address these top issues and build a foundation to begin to solve many other pain points through the install process, setup, and usage.

Case Doc Buckets	Contacts = 50686 total	Percentage vs. Overall
How Do I's (Includes MU, DL, and Upgrade vs. SBS)	2206	4.35%
Problems Installing	1417	2.80%
All Install calls minus Online backup, Payroll, etc.	5086	10.03%

*Directional data from 9/30/08 - 1/14/09 (Quickbooks 2009 | SS | Pro/Prem | ES)

Call Data

– Confusion around install process, best practices, and multiple installs

- “I just purchased 2009 I need to install on additional computers”
- “I am having an issue installing my 3 user Pro 2009.”
- “NEED HELP INSTALLING QUICKBOOKS ON MULTI COMPUTERS”
- “I just bought 2009 premier and need help installing”

– Confusion around Multi-User scenarios

- “need to install quickbooks on a server and 3 work stations.. Need help to setup networking”
- “On my second computer for user # 2 I installed the software and the when I tried to open Quickbooks I can't get open up my company. I had 2006 Quickbooks and after installation on the server it is working fine. I had a network set up with 2006 and it was working fine. . we did remote access.....was helping out ...he disconnected the call.”
- “How do I install QuickBooks 2009 to my computers so that we can work on the company file at the same times.”

– Questions around how to handle installing side by side vs. upgrade.

- “He wanted to install quickbooks 2009 separate from quickbooks 2005”
- “How do I install Quickbooks 2009 without affecting my current product”
- “I am installing an upgrade. I have some questions about the best way to proceed.”

– Previous experiences with install have led customers to call before attempting on their own.

- “I just purchased 2009 and need help installing and converting from 2007 without losing any data”
- “Need to install quickbooks on 3 computers and need help bringing my data over ”
- “I want help installing and converting to 2009... had trouble with 2008”