

SHANE CLEVENGER

UX LEAD / MANAGER

CITY ELECTRIC SUPPLY

CART & CHECKOUT

CART & CHECKOUT - CASE STUDY

Turn problems into opportunities

PROBLEM STATEMENT

Customers were adding products to their carts but frequently abandoning their purchases before completing checkout.

The cart and checkout experience had significant friction and complexity, contributing to drop-offs and a very low rate of mobile usage.

This created a clear gap in the overall e-commerce experience and limited opportunities to convert customers across devices.



DATA - CASE STUDY

Strategy to increase participation rate

GOALS

Incentivize

Build trust and confidence throughout the checkout experience

Optimize

Eliminate duplicate entry by simplifying how customer information is captured

Streamline

Reduce friction by making cart and checkout details clear and consistent

CHALLENGES

Technical

Improved pickup and delivery, inventory visibility, and split-order handling while simplifying configuration.

Operational

Simplified checkout by reducing duplicate information and streamlining configuration, messaging, and fulfillment.

Budget

New discoveries expanded scope and required additional buy-in.

CART & CHECKOUT

Improving the experience to reduce drop offs

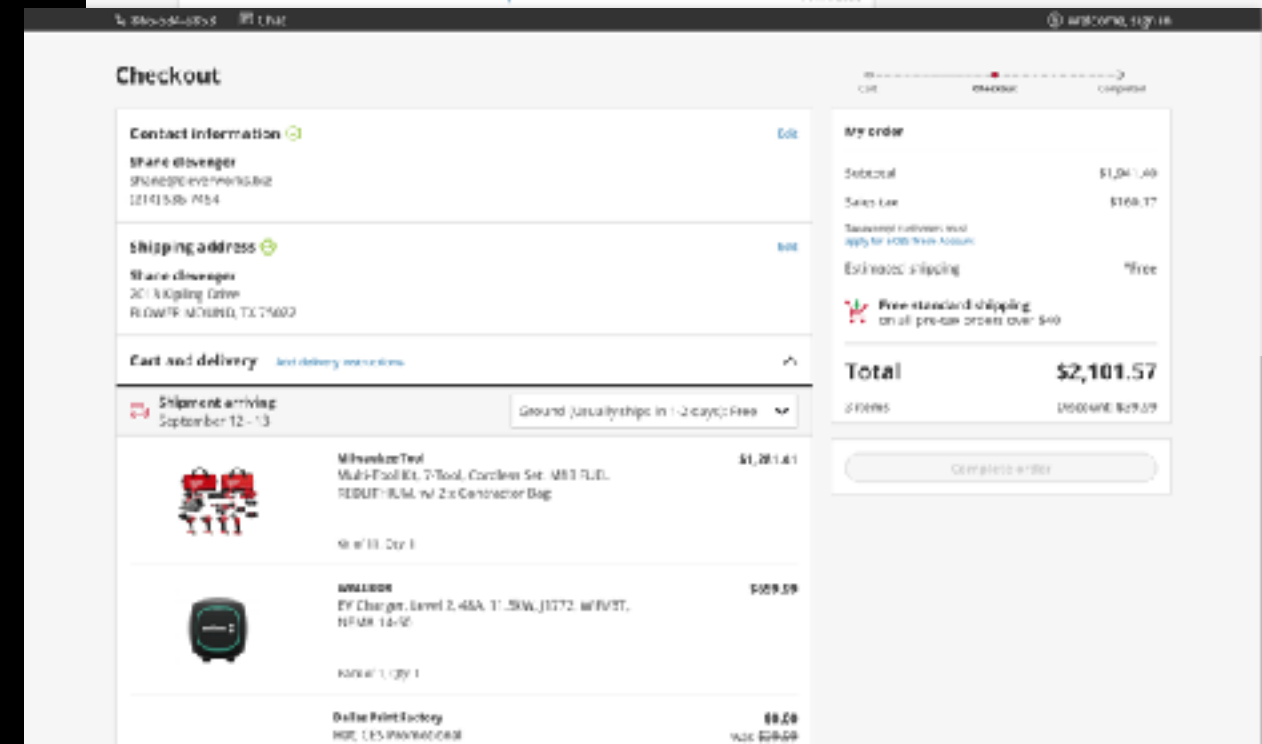
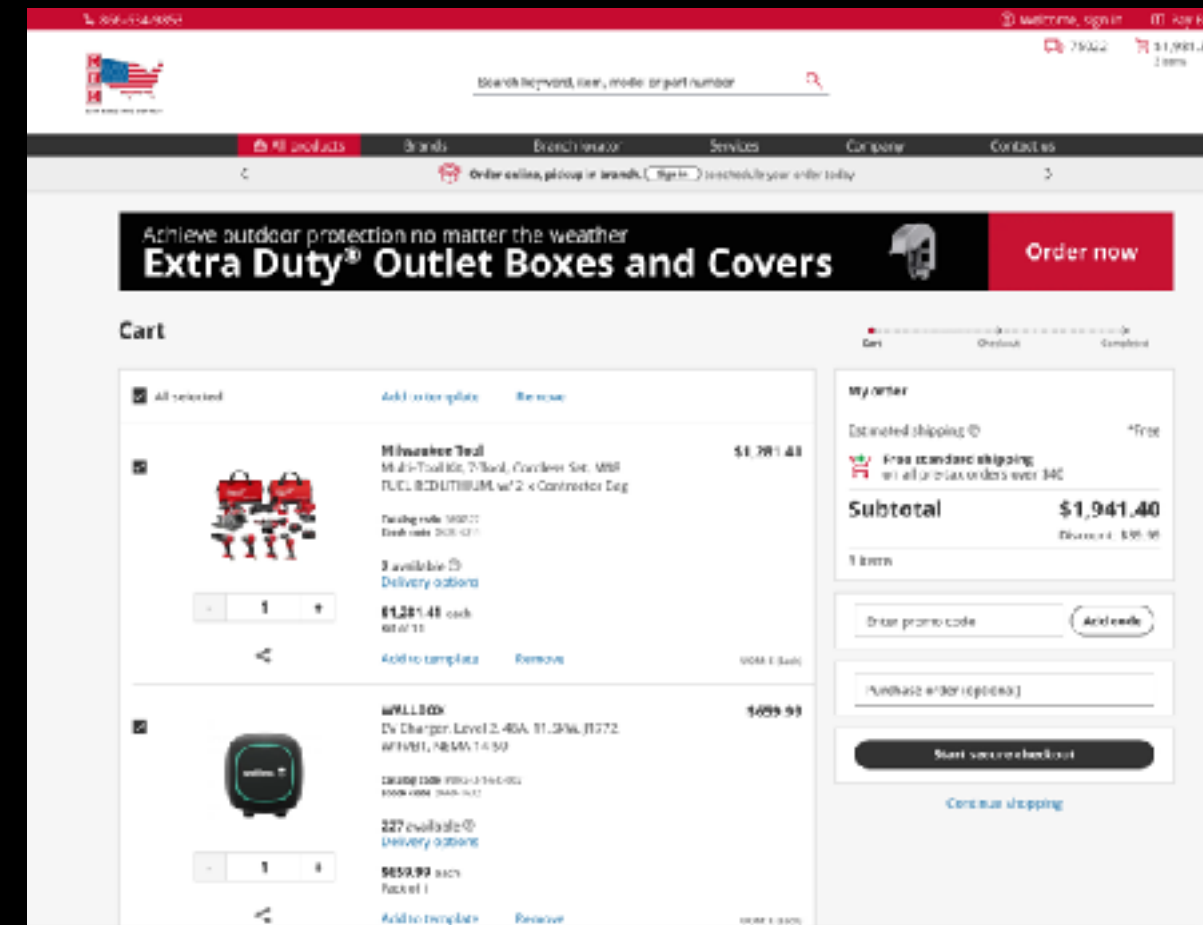
What improved

- Moved all configuration into the cart.
- Removed unnecessary rules to reduce alerts and friction.
- Simplified checkout header and footer.
- Added prefill and editable completed sections.
- Improved layout with a mobile-first approach.

Results

- Revenue increased **25%**: \$1.39M → \$1.74M
- Orders increased **12%**: 4,271 → 4,792
- Average order value increased **11%**

Overall, the improved cart and checkout experience reduced friction, simplified the customer journey, and contributed to higher order volume and revenue.



STATE FARM

OVERVIEW

STATE FARM TEAMS

Key areas of focus and my teams

DSS Business app

Mobile telematics for vehicle fleets

Established the UX team for a new telematics business fleet app

- Agile: Recurring 3 week sprints
- UX reviews, stand-ups & 1on1
- 1 UX designer, 1 generalist and 1 content

Voice & Chat

Virtual assistant, UI, AI & persona strategy

Responsible for consistent taxonomy for customer facing bot, live chat and agent chat

- Agile: Recurring 3 week sprints
- UX reviews, stand-ups & 1on1
- 1 UX designer, 1 generalist and 1 content

Emerging Technologies

Entrepreneur & data-driven approach

Smart car and home (ADT, Ting and Telematics)
“Repair and replace to predict and prevent”

- Waterfall: Support as needed
- Vision and discovery, design thinking workshops
- AI, voice and smart technology

CoE

Consistency, efficiency & productivity

Figma patterns, assets and resources
Experience guide and strategy

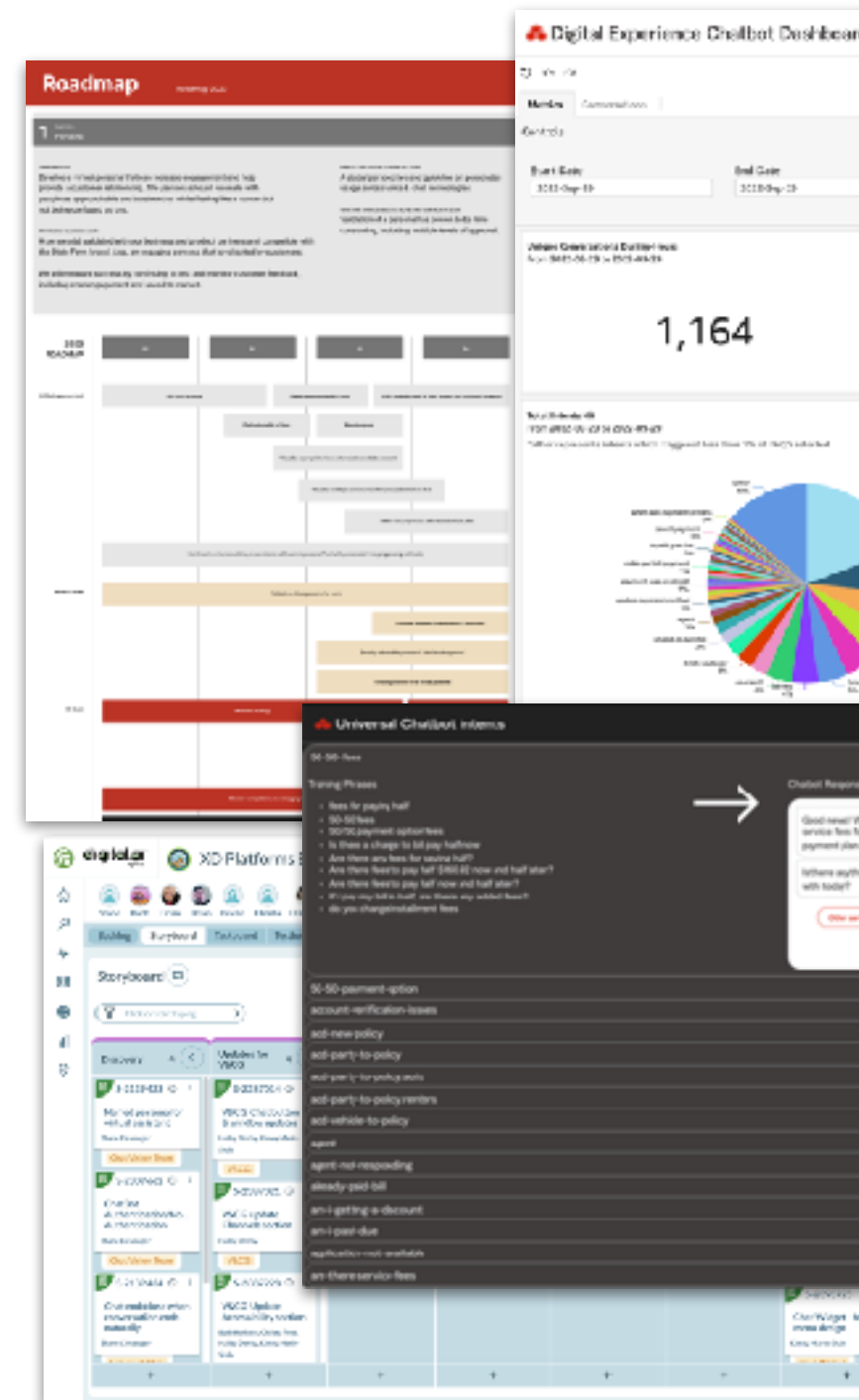
- Agile: Recurring 3 week sprints
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- 1 UX Lead, 1 generalist and 1 content

STATE FARM OVERVIEW

State Farm chatbot persona

RESPONSIBILITIES

- Driving UX strategy and roadmap
- Fostering a culture of innovation and problem-solving
- Managing team timelines and resources
- Leading 1on1 and design reviews
- Prioritizing and evaluating what is and is not working
- Cross-functional collaboration for co-creation
- Mindful of emerging trends & technologies
- Conducting user research activities and workshops
- Leading showcases, UX audits, HCI, journey/empathy maps
- Tracking UX KPIs for data-driven, customer first approach
- Discovery and innovation for UX lead solutions
- Building pixel perfect prototypes using Figma
- A/B tests and moderated/unmoderated usability tests
- Ensuring compliance with accessibility standards
- Proficient with Design Thinking and Agile methodologies
- Defining patterns and guidance for CoE



STATE FARM

CHABOT PERSONA

PERSONA - CASE STUDY

Understanding platform capabilities

NEW PLATFORM STRATEGY

Initially, enhancements needed to align with the existing Live Engage legacy platform before the framework upgrade.

Following the completion of the Hercules merger, opportunities were identified to reimagine the UI, features, and other essential components, **including a chat persona.**

- 1 Integration**
Consistent experience, no matter what page
- 2 Consistency**
Consistent welcome, statements, closing and design
- 3 Re-usability**
Longer term interrelation with voice, SMS, Messenger, etc
- 4 Capabilities**
Enhance informational, navigational and transactional
- 5 Topics**
Allow customers to switch context seamlessly
- ★ 6 Persona**
Colorful personality branded for personalized experience
- 7 Personalization**
Sentiment analysis and personalization opportunities
- 8 Escalations**
Get customers to the right info, page or person
- 9 Awareness**
Built-in context awareness initiating immediate relevant responses

PERSONA - CASE STUDY

State Farm chatbot persona



PROBLEM STATEMENT

One of the key objectives for State Farm's chatbot is to reduce dependence on traditional call centers and reduce escalations to live chat.

Additionally, chat presents an opportunity to enhance customer engagement, cultivate a more robust digital relationship, and alleviate the workload for State Farm agents.

PERSONA - CASE STUDY

Beginning with a competitive analysis

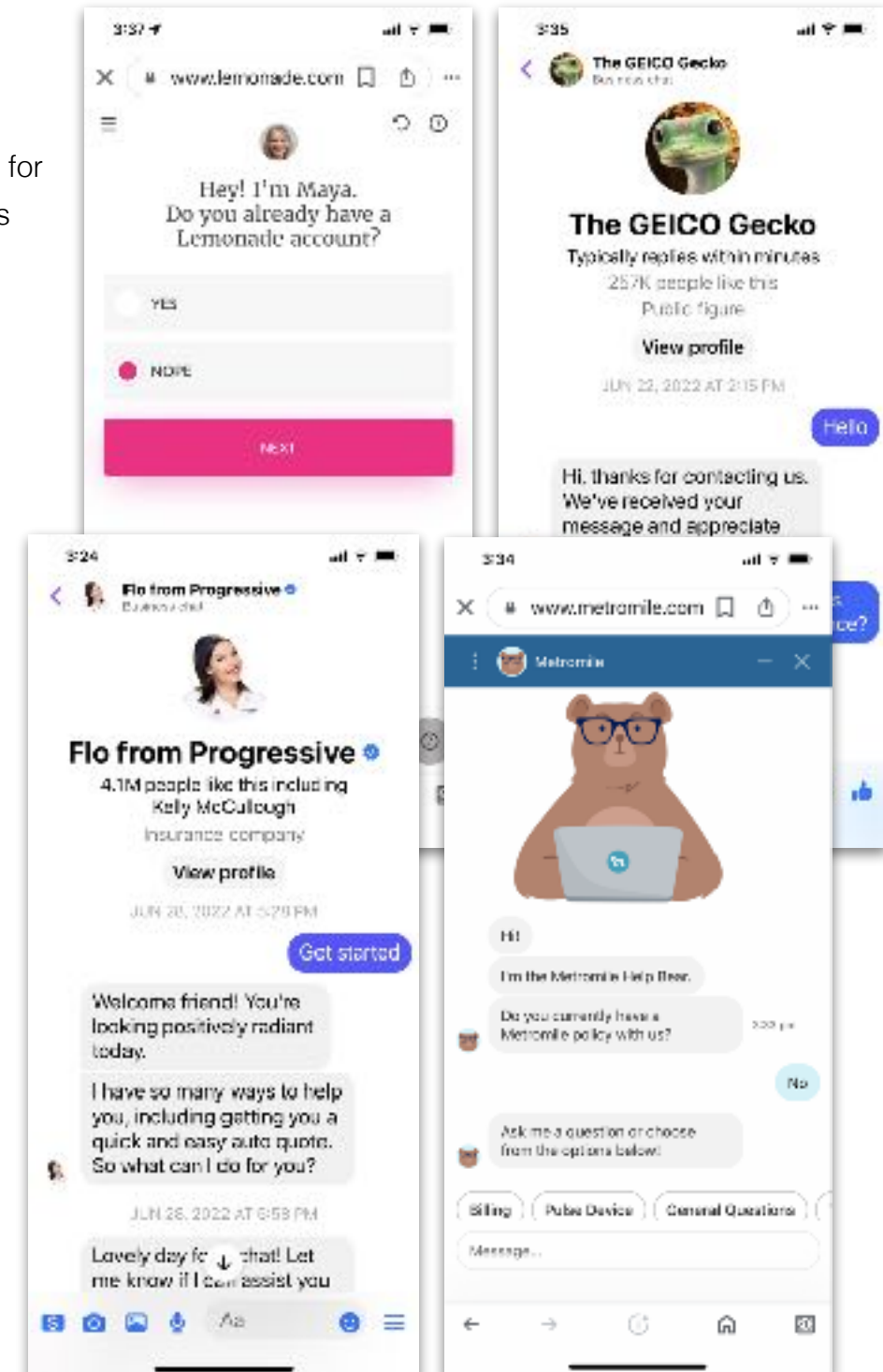
ENTERPRISE RESEARCH

Leading chatbots showcased distinctive branded personas. Industry-wide, there was a noticeable move towards greater consistency in chat taxonomy.

Personas were effectively leveraged to establish digital relationships, offering a personalized touch.

Research helped highlight an opportunity for the development of a chat persona to elevate customer engagement and reduce escalations, dependency on the call center and agents.

Innovators like Lemonade employ multiple personas for diverse shopping journeys



PERSONA - CASE STUDY

Establishing and validating the persona

VALIDATING THE PERSONA

Workshops

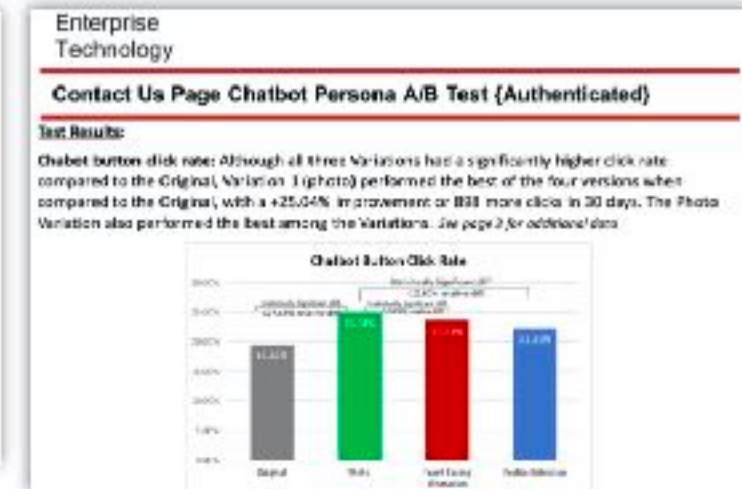
- 5 Step Persona
- Empathy Map

Usability testing

- High level test, including Jake from State Farm
- Photo vs Illustration
- Passive vs colorful and escalation

A/B Test

- CTA and launch



PERSONA - CASE STUDY

Persona strategy

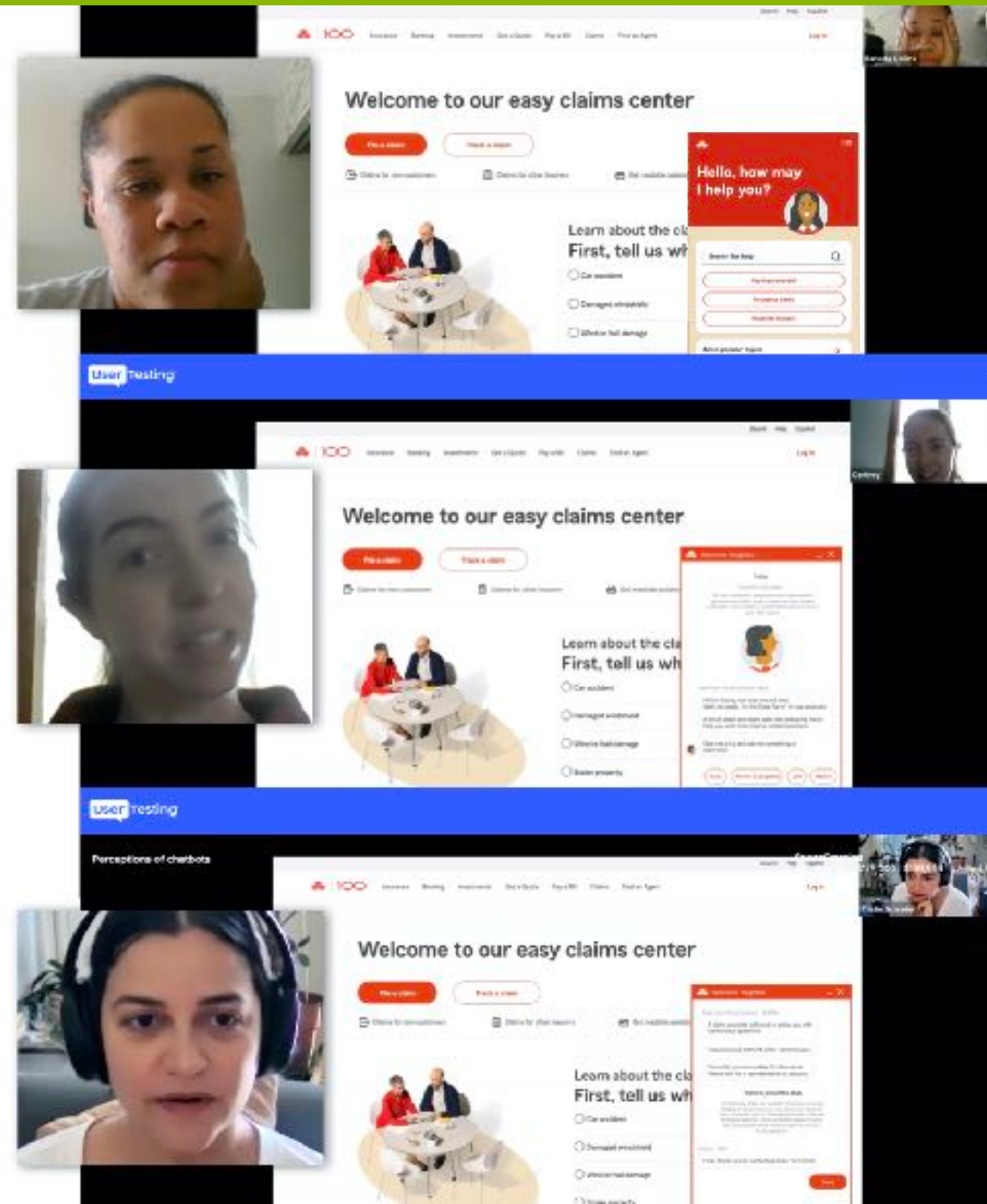
RESULTS AND PERSONA MVP's

Conducted a usability test for a persona strategy and incorporated the insights into the MVP.

As seen with the usability test the MVP survey resulted in an overwhelming preference for the persona, particularly in empathizing with customers facing rate increases.

Overall, chatbot saved over 15 million annually on call center dependency by developing self-serve solutions.

The persona drove more value by personalizing intents, making the digital experience feel more human, and building a stronger connection with the brand through a consistent voice.



Verizon

CASE STUDY - IN-STORE PICKUP

IN-STORE PICKUP - CASE STUDY

Turn problems into opportunities

PROBLEM STATEMENT

Criminals had the ability to exploit stolen payment information for online purchases, allowing them to circumvent the need for a physical address. This became even more challenging when criminals could present a counterfeit ID at pickup.

Additionally, the overall experience, from selecting a store to navigating availability was not intuitive.

Addressing these issues was imperative not only for the enhancement of customer satisfaction but also for mitigating fraud, security, and efficiency.



IN-STORE PICKUP - CASE STUDY

Rethinking how customers experience in-store pickup

GOALS

Comprehensive

A seamless and effortless, high-quality omnichannel customer experience.

Simple

I wanted to reduce drop rates from the store locator by being informative and intuitive.

Secure

To reduce fraud and issues at pickup I wanted a secure digital confirmation.

CHALLENGES

Technical

The new concept has complexities that are beyond standard digital channels.

Operational

Connecting retail locations with the database to track inventory for accessories for an additional upscale opportunity in the new ISPU flow.

Budget

Research lead to more opportunities requiring more scope.

IN-STORE PICKUP - CASE STUDY

Establishing data based decisions for a customer first approach

DATA-BASED

Voice of customer

High volume of negative customer feedback associated with current ISPU.

KPI

Low engagement due to issues related with a poor ISPU experience and confirmed by Glassbox sessions and drop off analysis.

UX audit and research

Identifying inconsistencies and a competitive analysis for opportunities.

Observations and interviews

Multiple sessions at the call center doing sidecar and interviewing reps and supervisors.

Service blueprinting

Visual to identify critical interactions.

Go-to-Gemba

Interviewed employees, store managers and customers at retail stores.

Insights

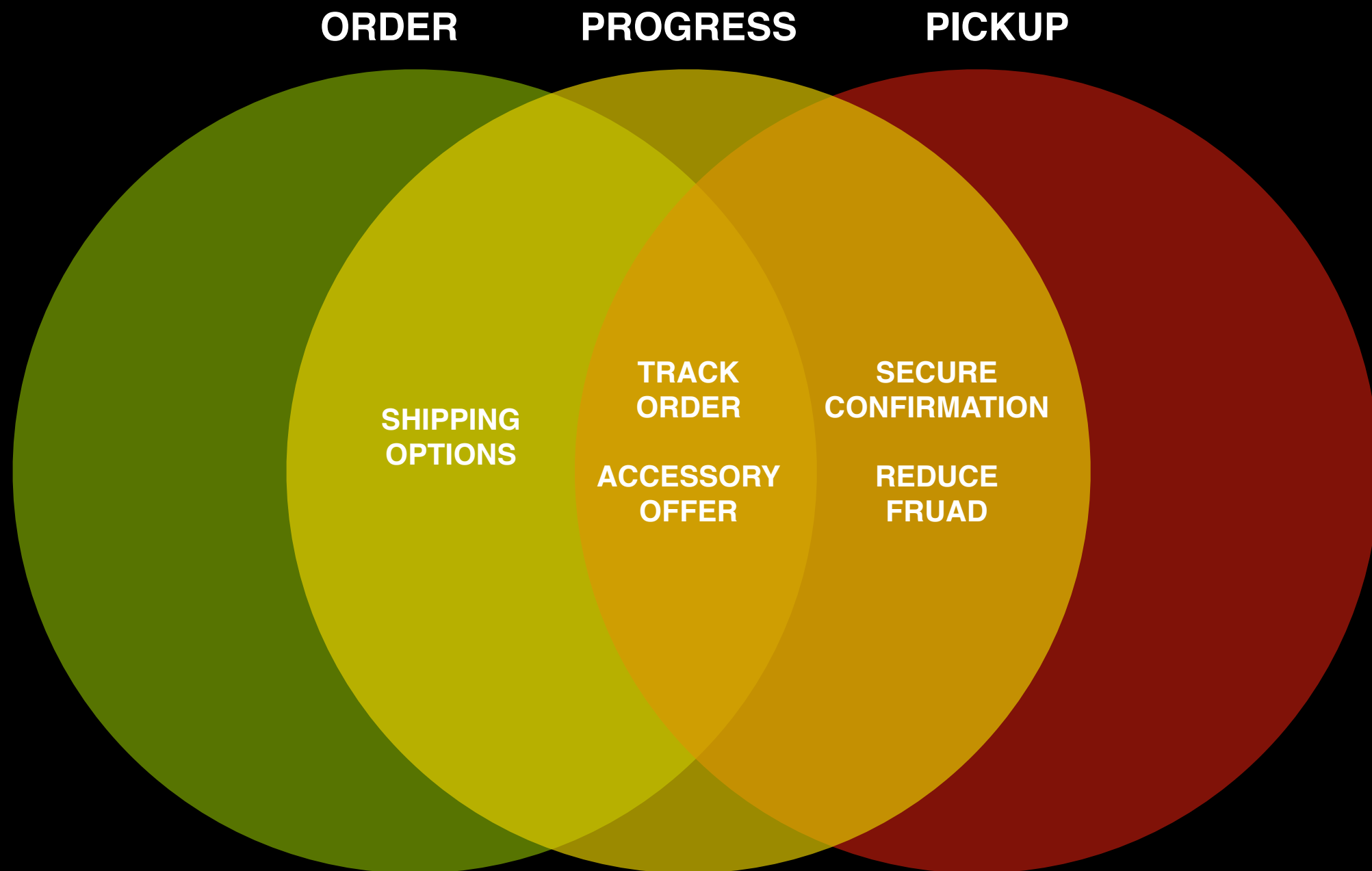
Only account owners can do the pickup and for security reasons 30% are sent home for ID or original credit card.

Stores already have technology to track inventory and some customers use ISPU for gifts, security or other reasons.



OMNI-DIGITAL

Connecting all channels digitally from ordering, progress to in-store pickup



IN-STORE PICKUP - CASE STUDY

Prototypes to testing

UX DESIGN

Personas and prototypes

3 design options were created for testing:

Good: Least effort from DEV and within budget, enhancement.

Better: Additional features that will increase scope.

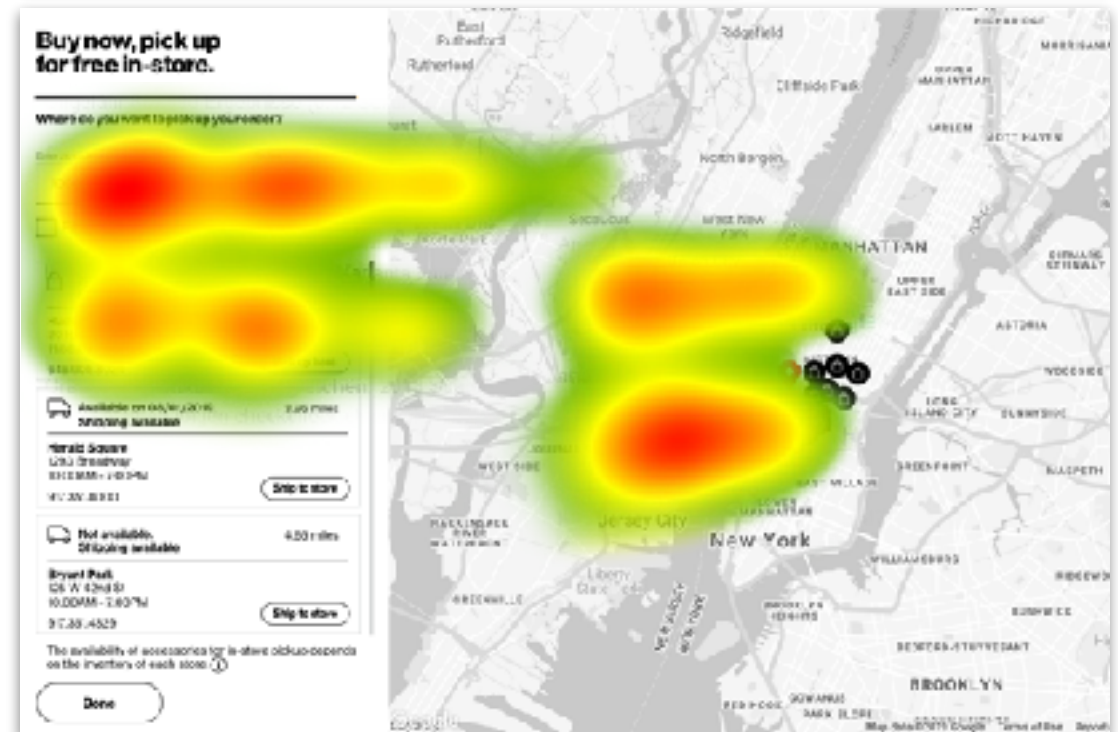
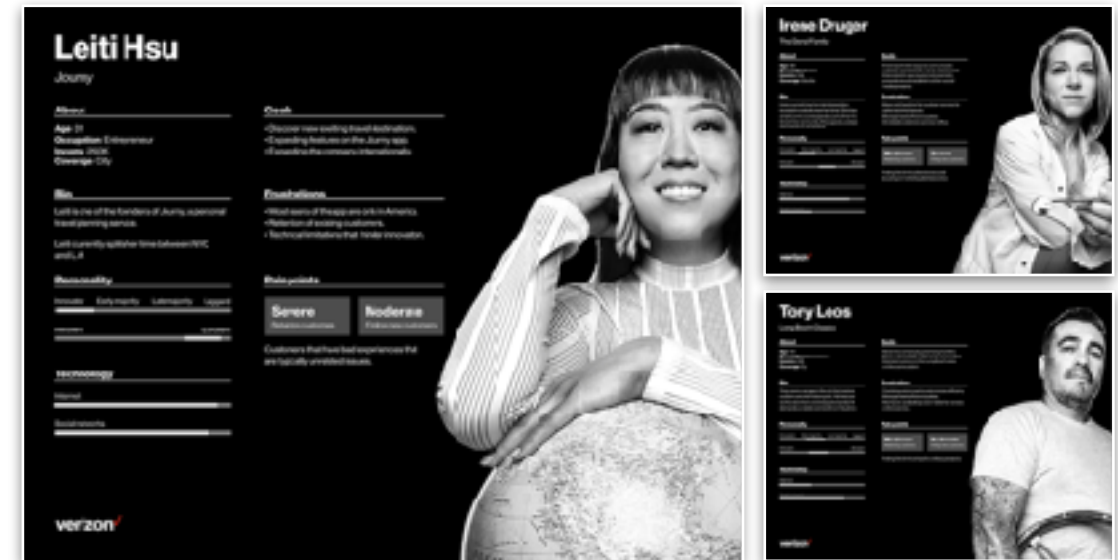
Best: All potential features identified from all research and data.

Testing

Tested all options resulting in the third option (Best) as the clear preference.

Co-creation

Stakeholders support all results and the preferred design option is accepted by product partners.



ORDER

A more intuitive experience when selecting a store

Buy now, pick up for free in-store.

Where do you want to pick up your order?

Enter zip code or city and state Radius

10001 25 miles

☐ Filter by availability 5.23 remaining

 Available today. Only 3 left in stock	2.25 miles
Hudson Yards 20 Hudson Yards 11:00AM - 7:00PM 646.805.8024	
Pickup here	
 Available on 08/01/2019. Shipping available	3.95 miles
Herald Square 1253 Broadway 10:00AM - 7:00PM 817.851.8000	
Ship to store	
 Not available. Shipping available	4.65 miles
Bryant Park 125 W 42nd St 10:00AM - 7:00PM 817.351.1328	
Ship to store	

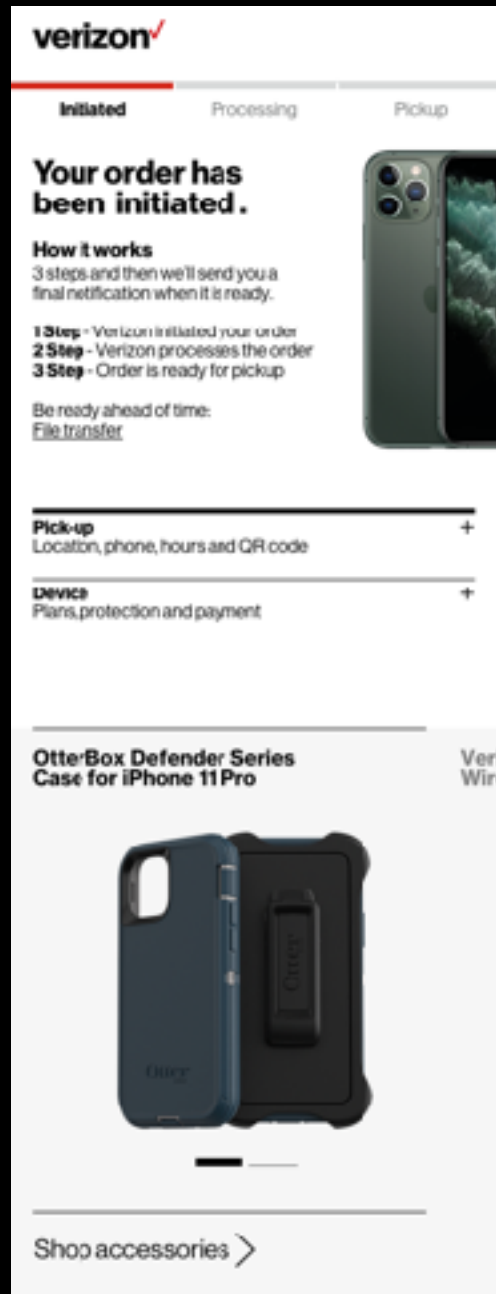
The availability of accessories for in-store pickup depends on the inventory of each store. ⓘ

[Done](#)

Filter by availability, how many in stock, when available and an option to ship to store



ORDER PICKUP



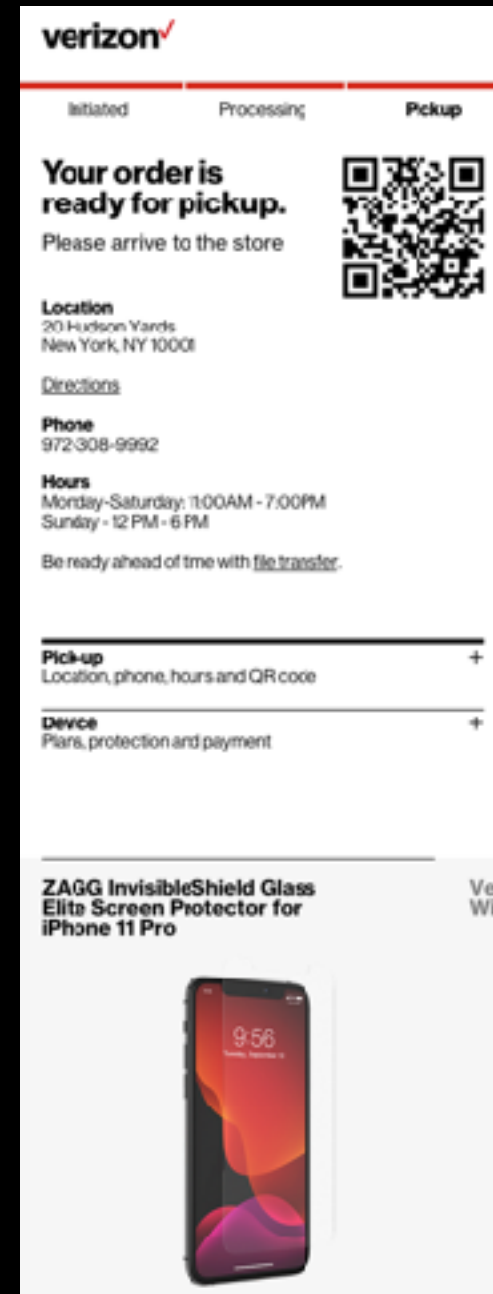
Initiated status

Progress bar
Accessory offer



Processing status

New accessory offer



Pickup status

QR for security and fraud
QR quicker transaction

Results

Over 40% increase of accessory sales after initial order.

Reduced the risk of fraud, improved tracking and confirmation for digital orders for an enhanced online customer and retail experience.

Verizon

PITCH DECK

FLEXIBLE CREDIT

Payments for accessories to increase sales and customer retention starts with research

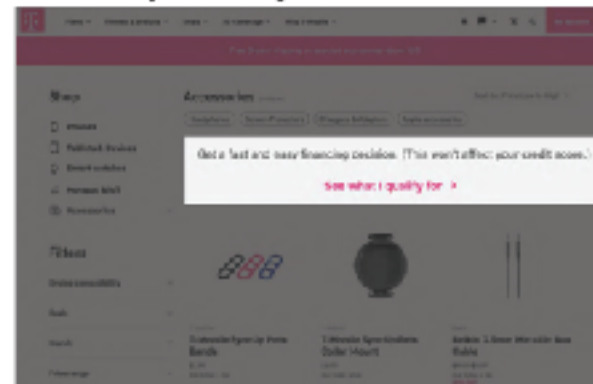
Discovering growth opportunities without research is like getting into a taxi and just saying...

“Drive”

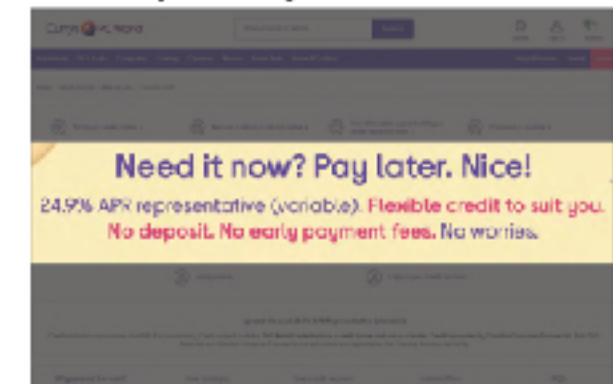


Not for confidential and p

Flexible credit - Competitive analysis



Flexible credit - Competitive analysis



Surge in demand for buy now pay later

Why buy now pay later?

COVID-19 continues to restrict household incomes, the search for liquidity was elevated during much of last year and is likely to remain so throughout 2021.

Companies are rapidly moving into the BNPL space, enabling this payment option through their online shopping platforms and in-store checkout services.

Even the likes of industry giants such as Gap, Macy's and Walmart have introduced this facility over the last year or so.

[View article](#)



Success story

Afterpay has it made with BNPL

Afterpay is perhaps the closest BNPL success story of 2020 and represents the phenomenal growth record of several Australian businesses in this sector. Having traded under \$5 in March, Afterpay's share price rallied throughout the rest of 2020 and closed out the year at an outstanding \$110.

The unrivalled success of the company, which allows customers to pay in instalments with zero interest and no fees if payments are made on time, has made significant inroads in the United States, where it now considers its biggest market, with more than 10 million customers and purchases exceeding the \$1-billion mark in November.



FLEXIBLE CREDIT

Reviewing current customer purchase options

Verizon's current financing, poor credit and saving options

Finance devices with good credit
24/mo, 30/mo or full retail

Poor credit for devices
Pay full retail, partial payment or monthly payments to get what you want.

Offers and discounts
BYOD, trade-in, pre-owned, military, student, first responders, and employee, etc.

Manage account
Pay remaining balance or manage device payments.

Finance accessories
Unavailable



24 months Full retail price

64 GB \$29.16/mo	128 GB \$31.24/mo	256 GB \$35.41/mo
---------------------	----------------------	----------------------

Monthly payments shown are for customers who qualify to pay \$0 Down, \$29.16/mo for 24 months; 0% APR. Retail Price: \$699.99. [One-time activation fee of \\$35.](#)
[Device unlocking policy](#)

Personal Business

✓

[Get it fast with In-Store & Curbside Pickup or same day delivery.](#)

< Back Contact Info Eligibility Review Account Info Delivery Payment

Based on your credit you'll need to pay full price of \$699.99 for your device(s).

Continue

FLEXIBLE CREDIT

Estimation on ROI

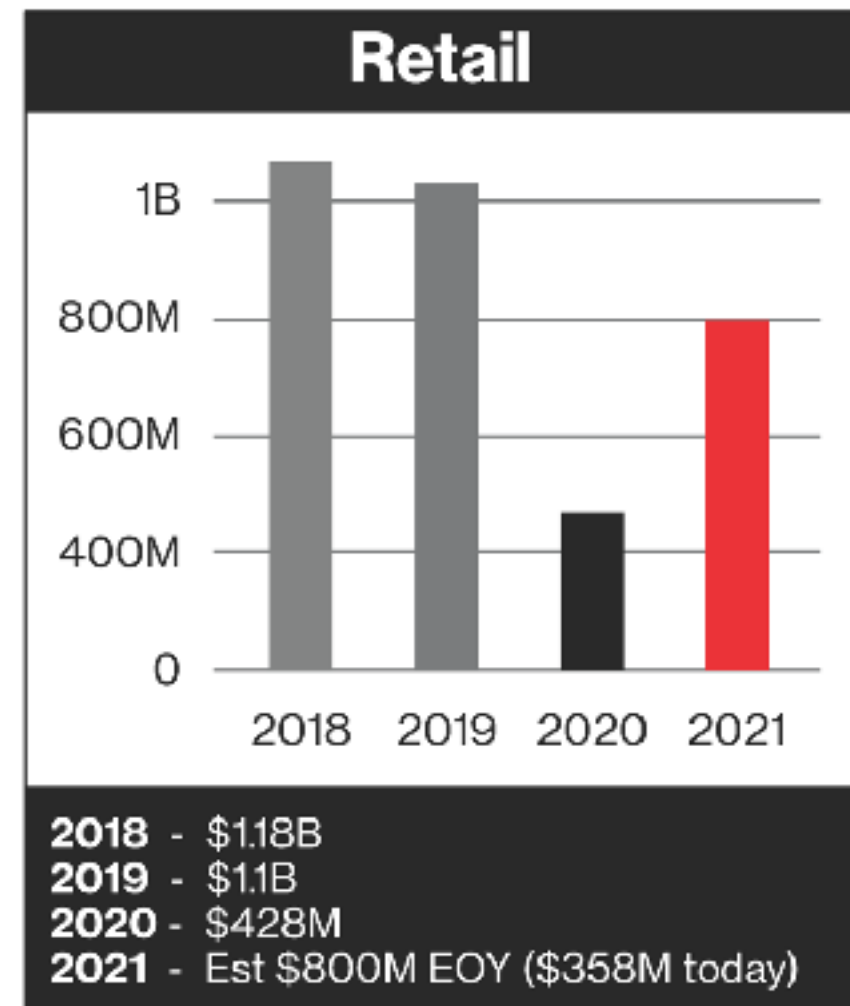
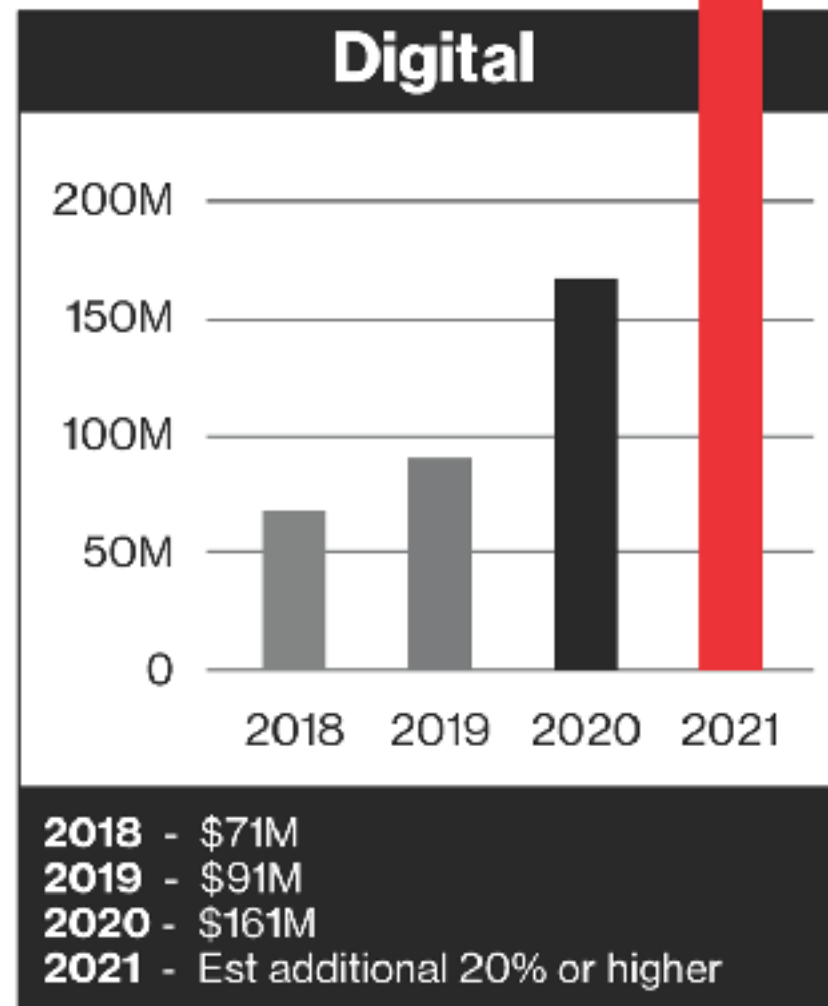
2021 estimated growth

Average digital growth
\$20 million (pre-pandemic)

2020 - Exception year
COVID produced about \$50M over the average \$20M annual digital growth. Retail sales had almost a \$430M loss in 2020.

Estimated digital growth
Based on trends, popularity, continued financial struggles and COVID concerns it is estimated that BNPL would contribute more than 20% additional growth.

This additional growth will help fill the gap from retail and digital sale losses.



FLEXIBLE CREDIT

Customer first - Opportunity for Gen Z and Millennials

**“Buy now pay later
allowed me to finance
my whole purchase.”**

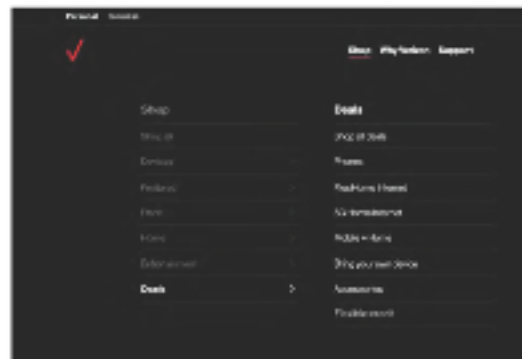


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FLEXIBLE CREDIT

Examples of what it can look like for new customers

Global nav - Flexible credit



Deals

Shop all deals

Phones

Fios Home Internet

5G Home Internet

Mobile + Home

Bring your own device

Accessories

Flexible credit

Flexible credit FAQ - Including offers



Here are some ways to help you get what you want.

Flexible payment terms.

Payment options.
Purchase phones, accessories and more at full retail, or a monthly budget that suits you, from 12 to 36 months.

Pay off your balance anytime.

No extra cost.
You can choose to make additional payments or pay off your balance 24/7 at no extra cost.

Promotional credit offers.

Promotions, offers and discounts.
You can save with promotions or offers. Also, discounts for eligible military, first responders and more.

Manage your account online.

Easily budget your account.
View statements and make payments using your existing customer account.

Add a link

Accessories page



So many ways to save.

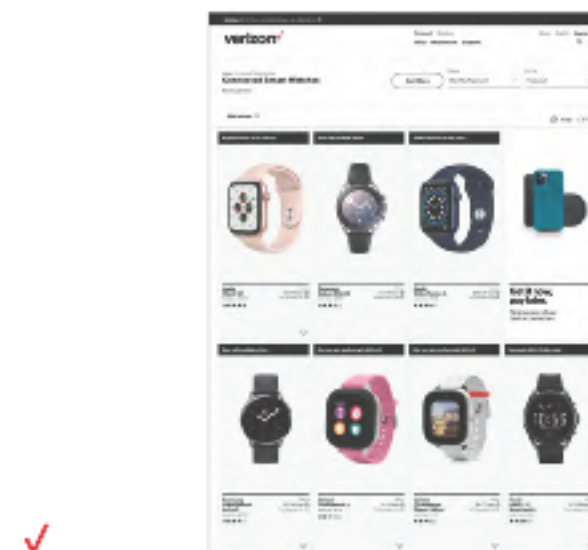
Get it now,
pay later.

Finance any of our
best accessories.

Shop



Accessory grid-walls



Get it now,
pay later.

Finance any of our
best accessories.

FLEXIBLE CREDIT

Checkout and purchase

Over 90% of accessory sales are from existing Verizon customers.



Overview page - Existing customers

Offer

Get it now, pay later.

Finance any of our best accessories.

Shop

FLEXIBLE CREDIT

Checkout and purchase

Accessory PDP

Accessory PDP

Customize

Full retail price \$349.99

24 months \$14.41/mo

36 months \$10.65/mo

Monthly payments shown are for customers who qualify to pay \$0 Down, \$14.41/mo for 24 months or \$10.65/mo for 36 months. 0% APR. Retail Price: \$349.99.

Quantity: 1

Continue Check out Add to wishlist

Free returns within 30 days. [See details](#)

Results

Leadership, product partners and stakeholders enthusiastically embraced the idea, placing a high priority on implementing the strategy.

Accessory checkout - Monthly payments

Let's finish up.

Shipping Information

Order Summary

	Monthly
Items	
Beoplay E8 Sport Earphones	24 months \$14.41
Taxes	\$0.00
Shipping	Free
Total	\$349.99

Verizon

INNOVATION

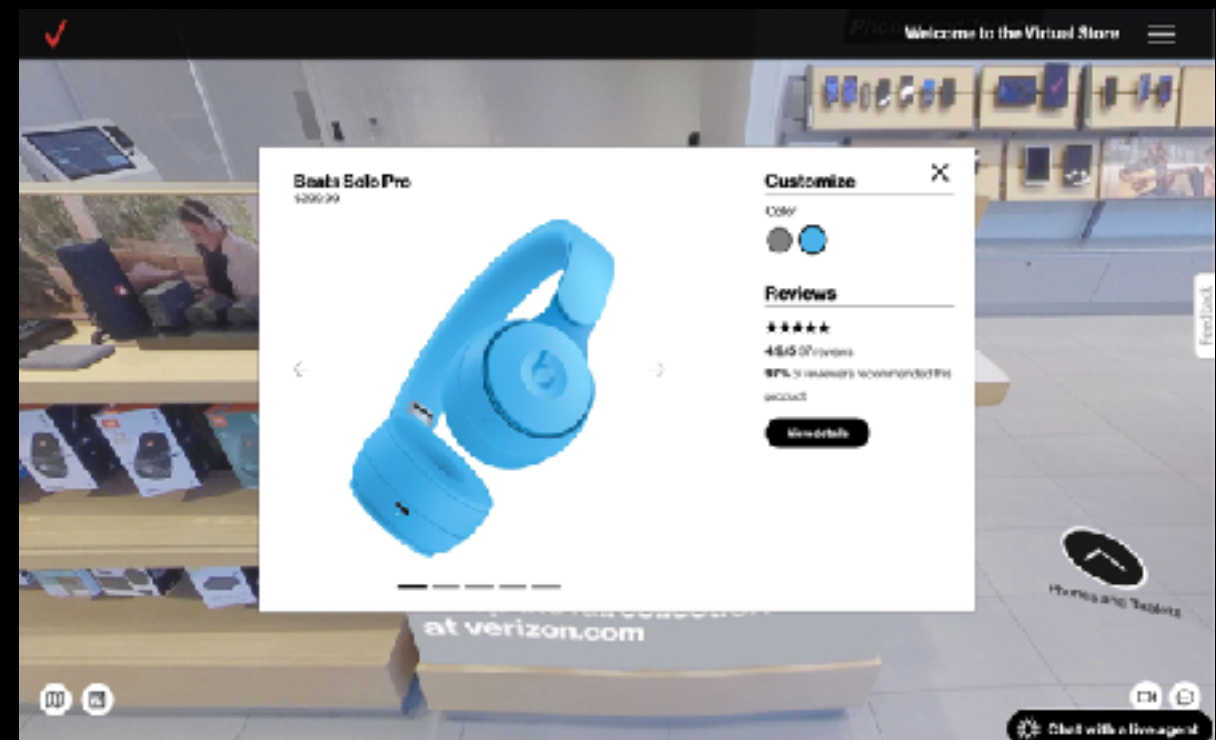
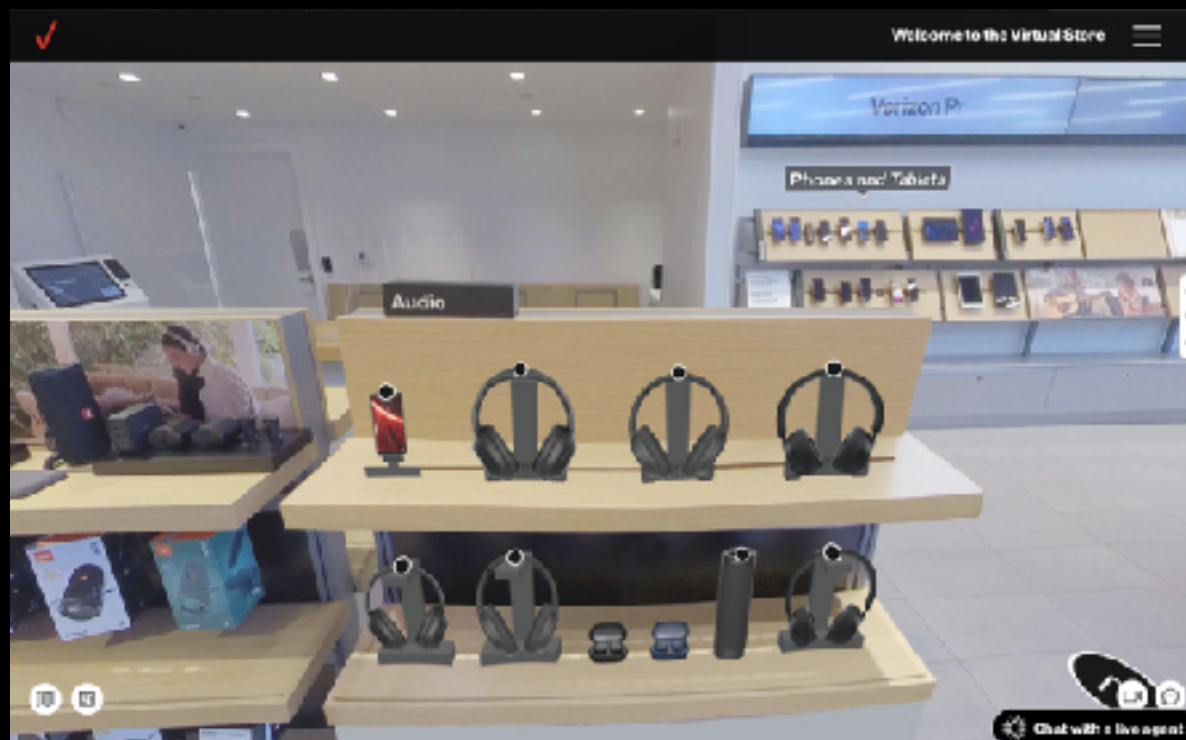
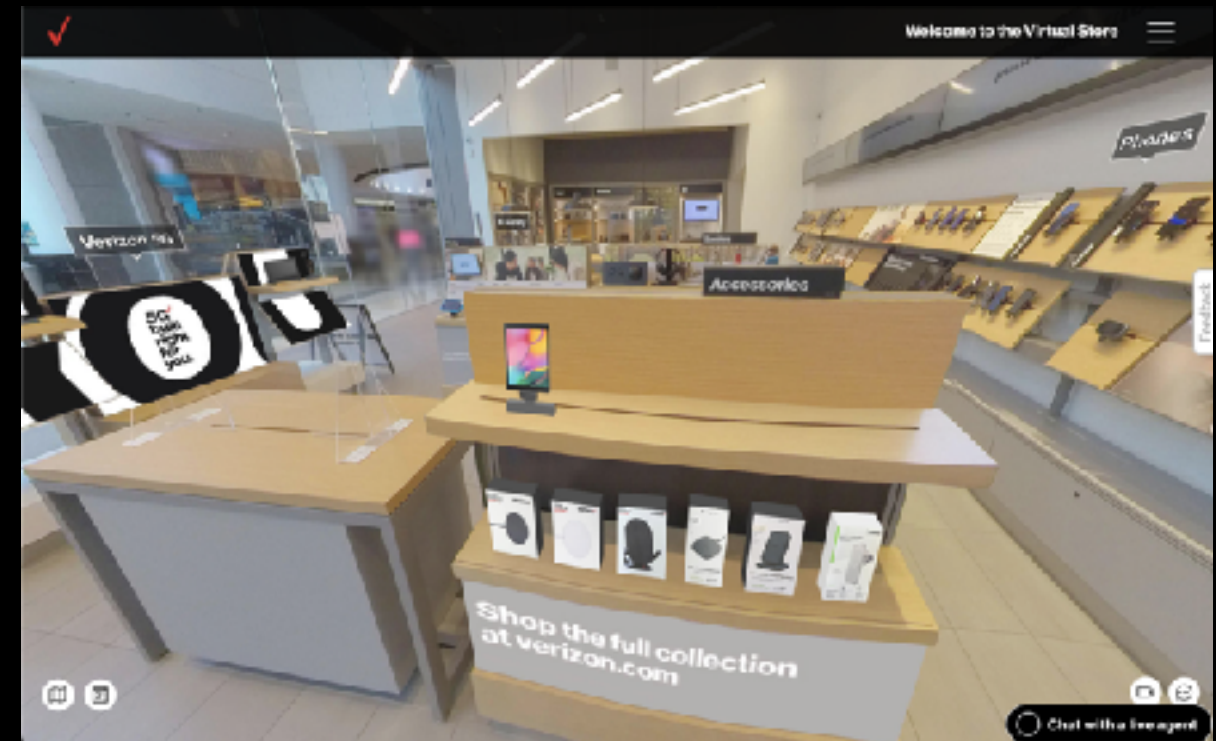
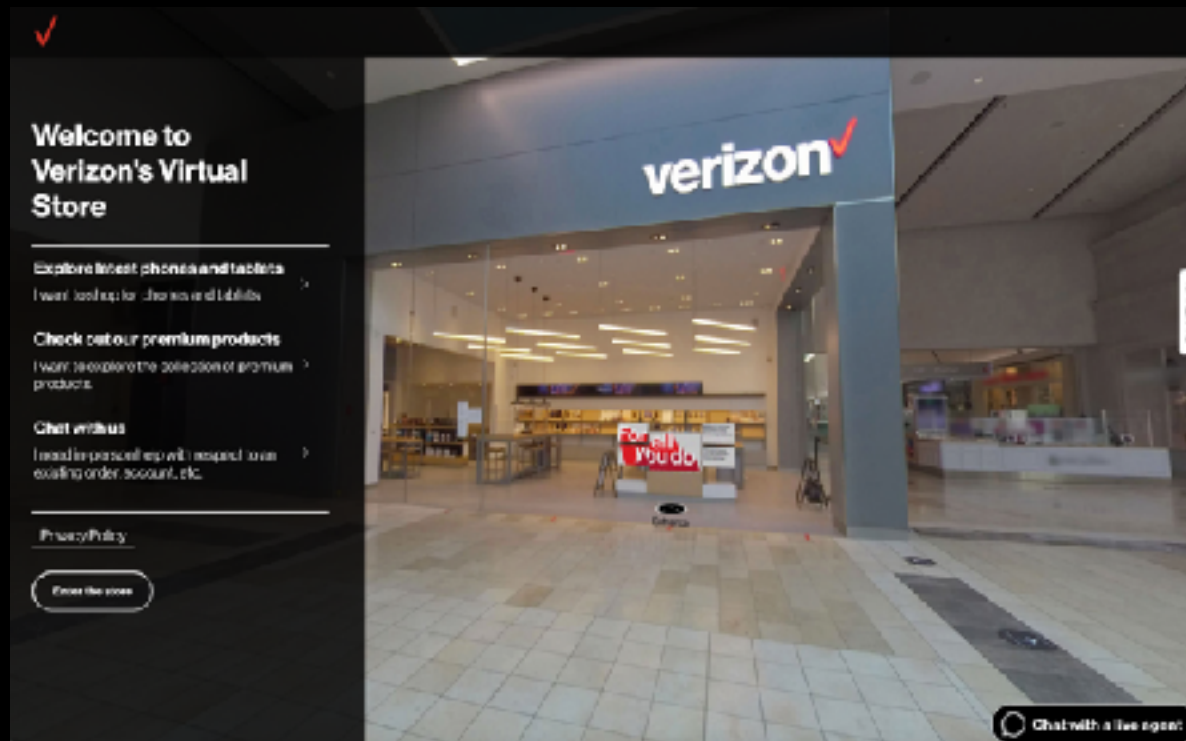
INNOVATION

AR to compare a device size or to try on an accessory



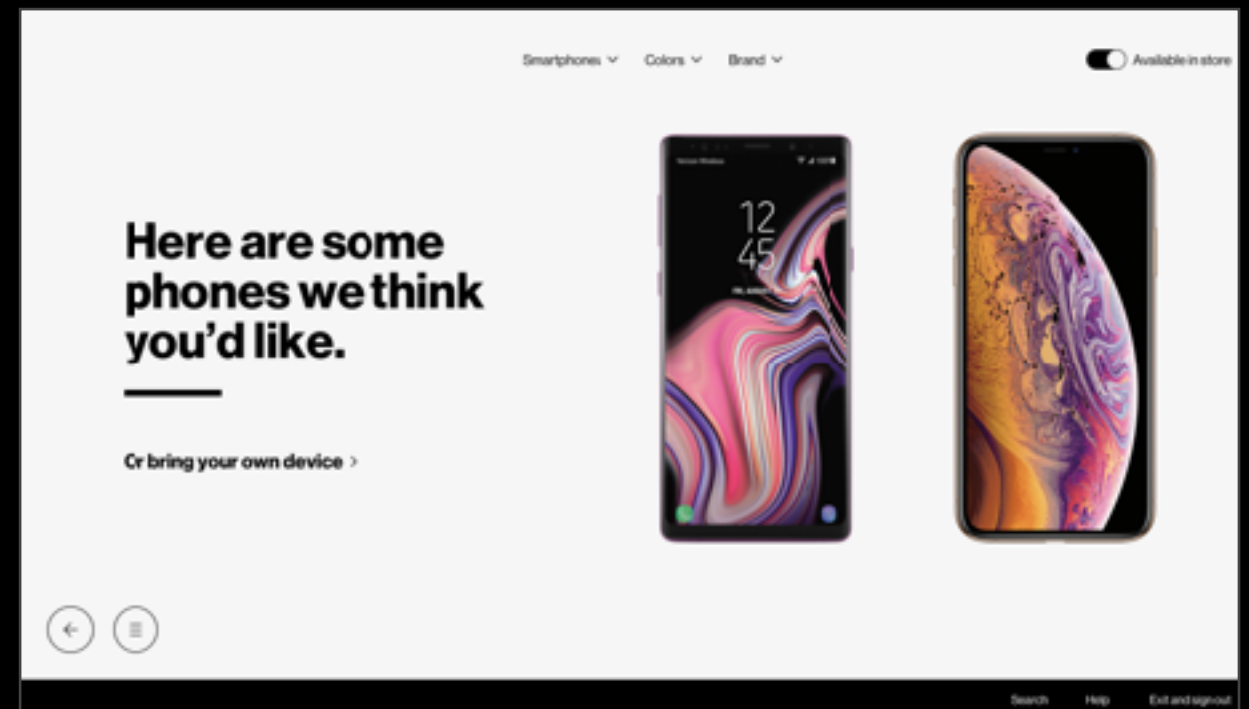
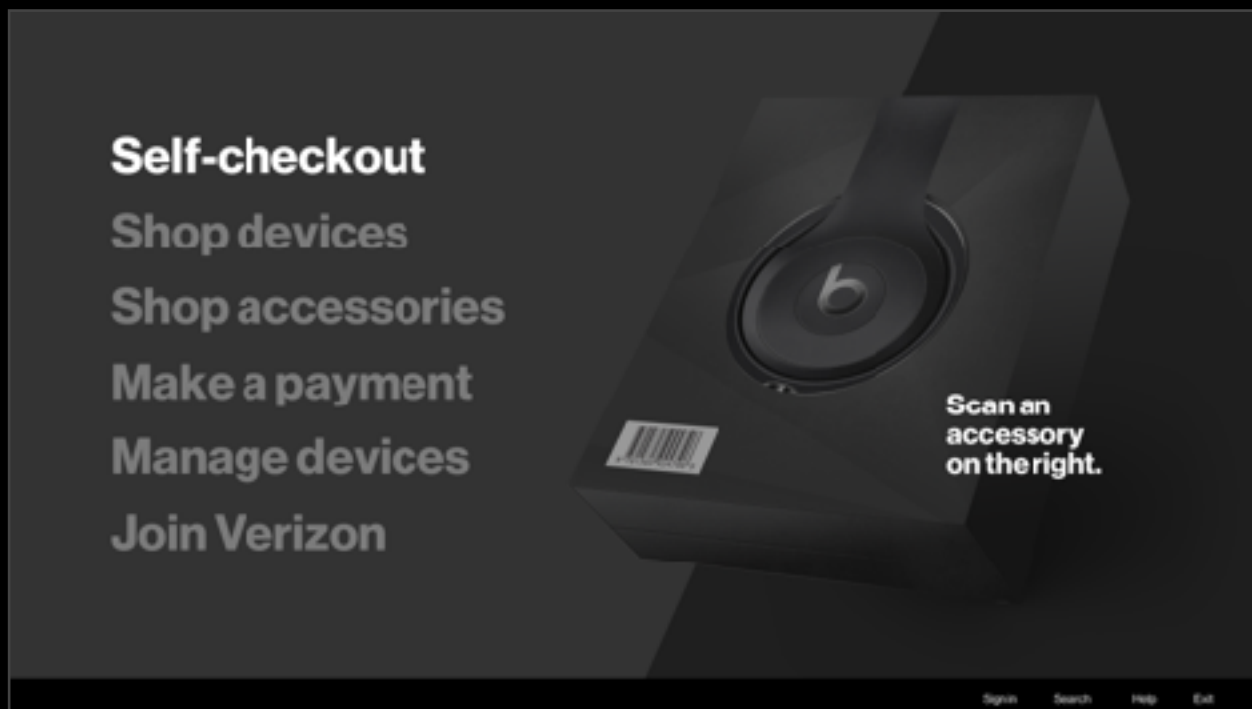
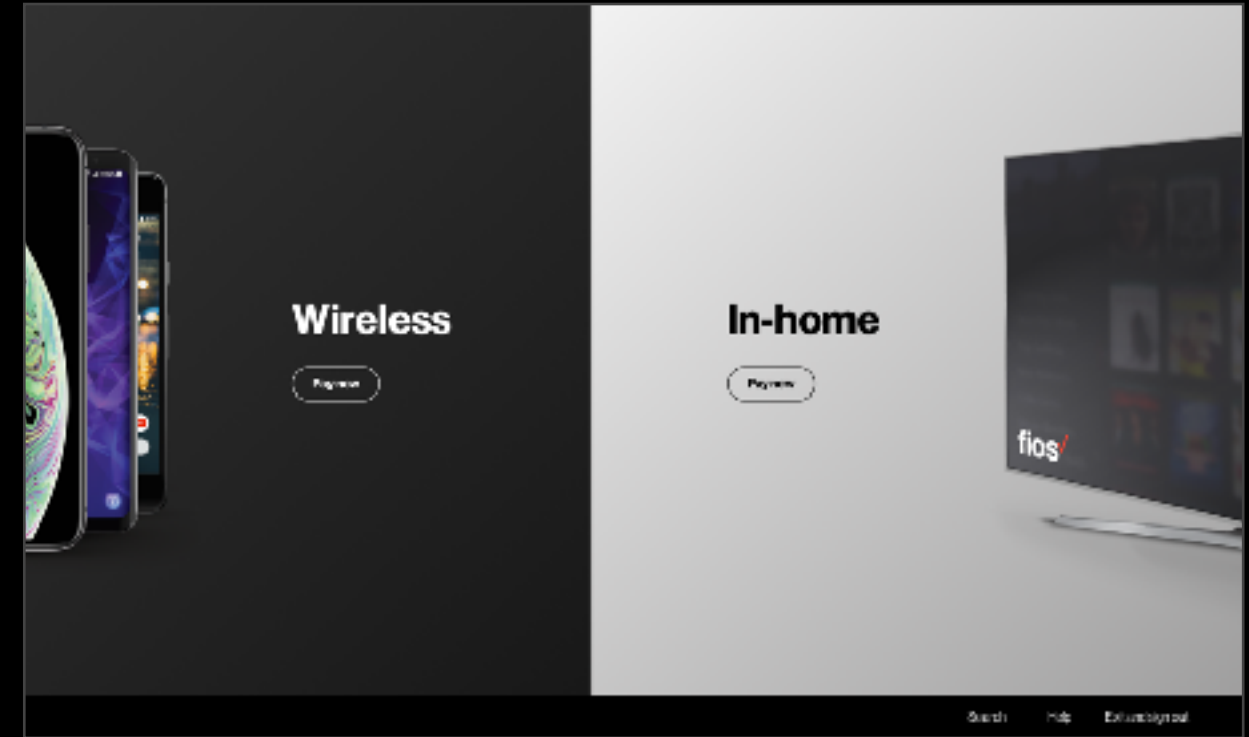
INNOVATION

Verizon Virtual Store for a fun and unique online shopping experience



INNOVATION

Digital Kiosk - Solution for self service checkout at retail

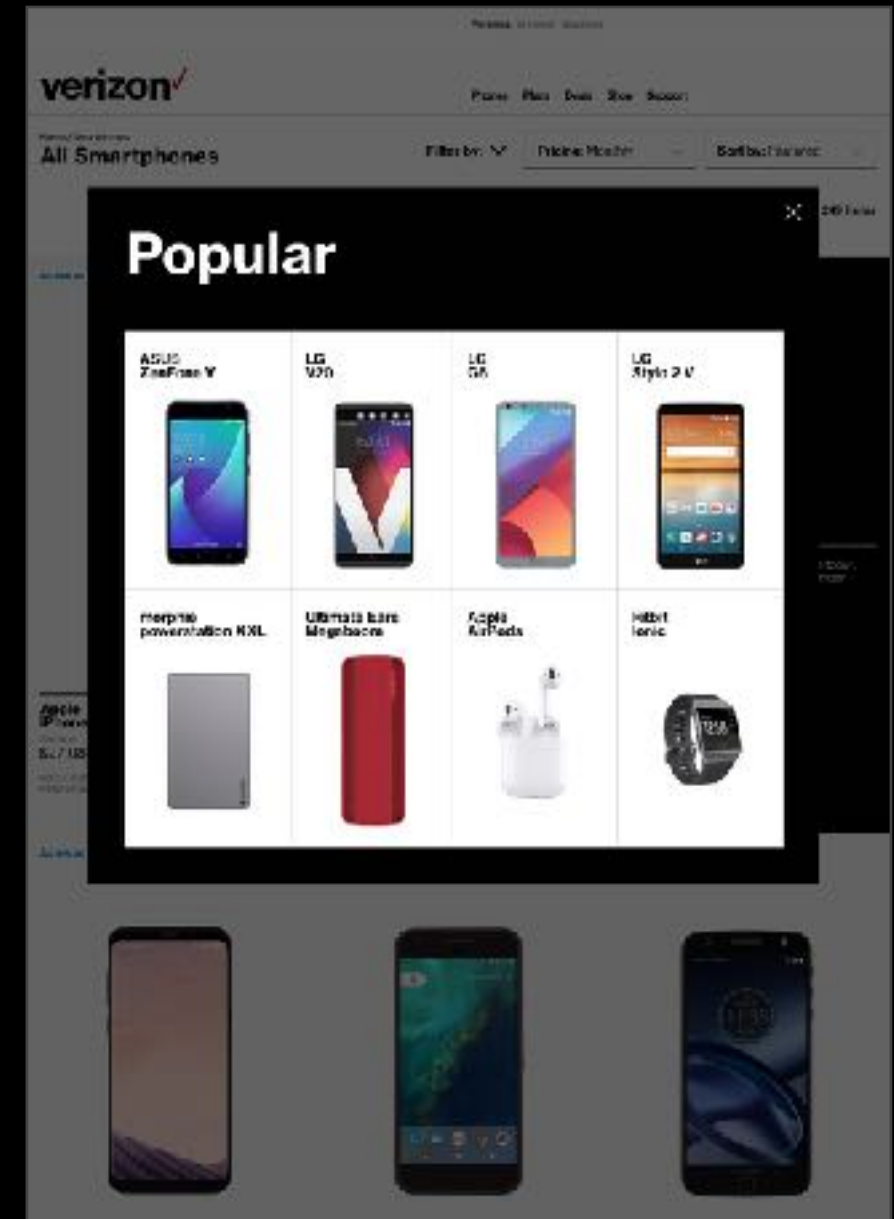
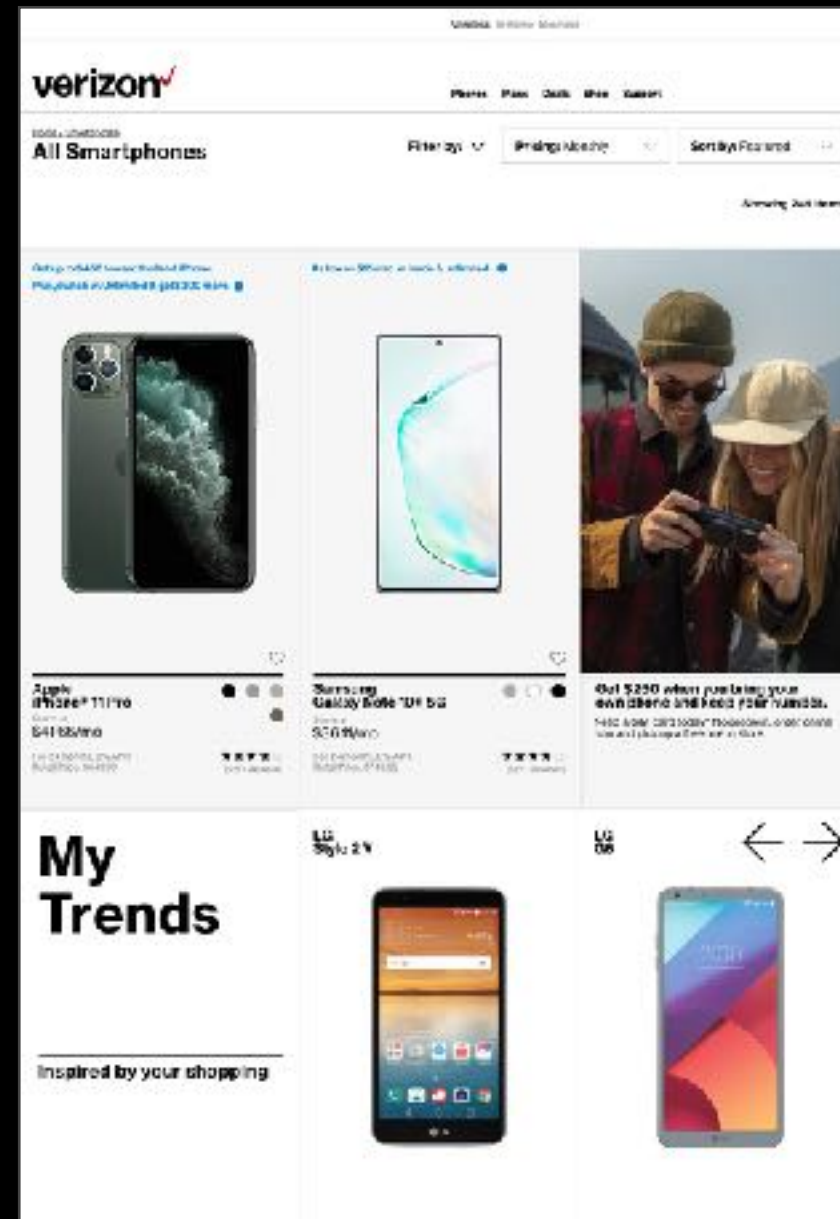
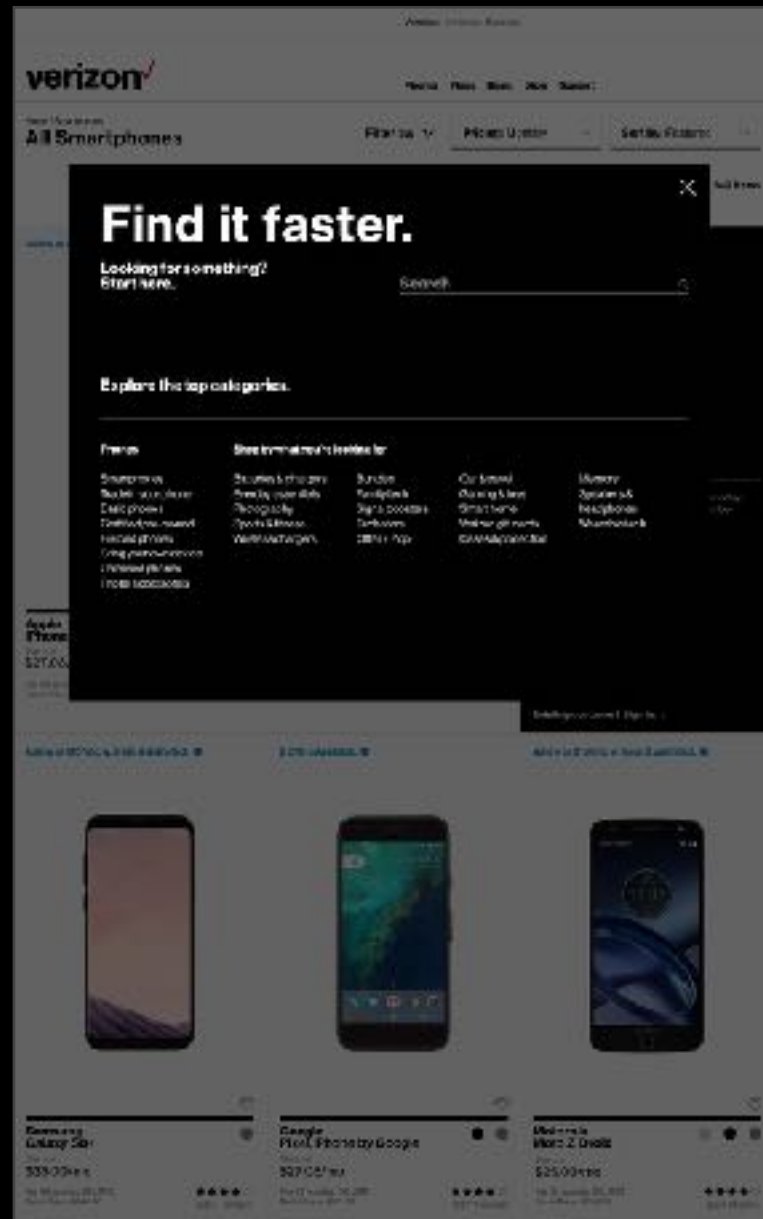


Verizon

PERSONALIZATION, AUDITS AND GUIDELINES

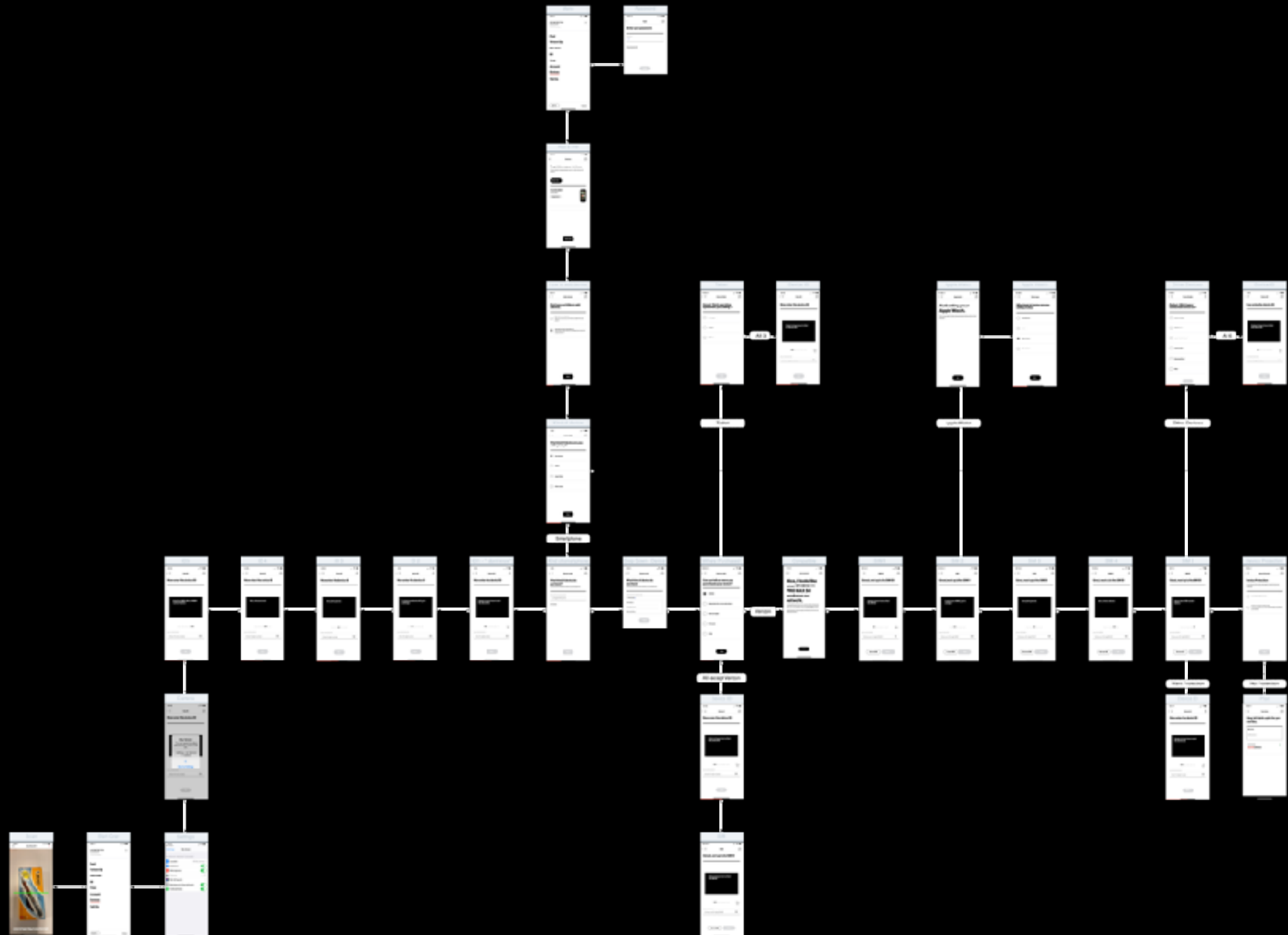
PERSONALIZATION

Enhanced search and device recommendations for existing or returning customers.



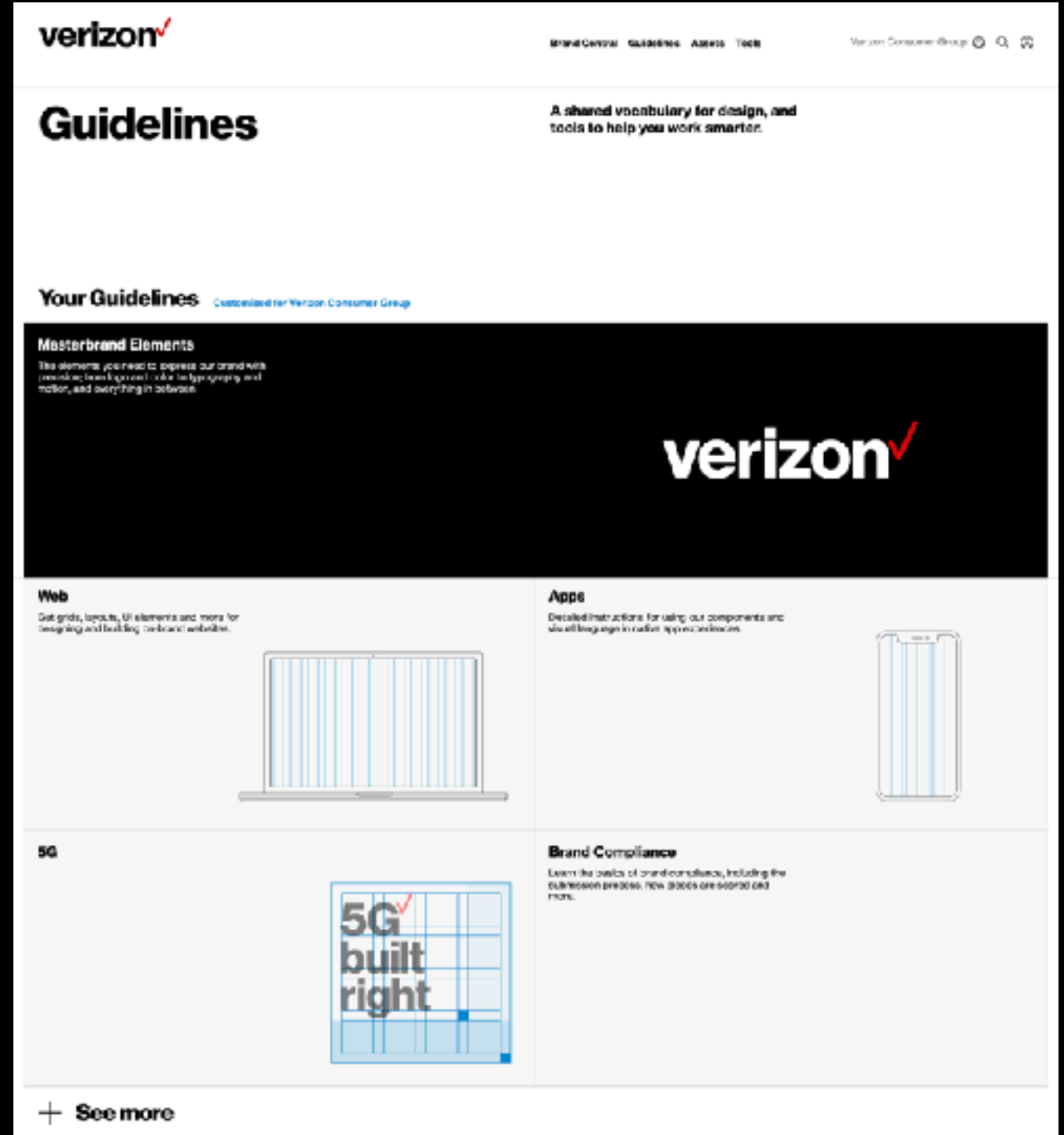
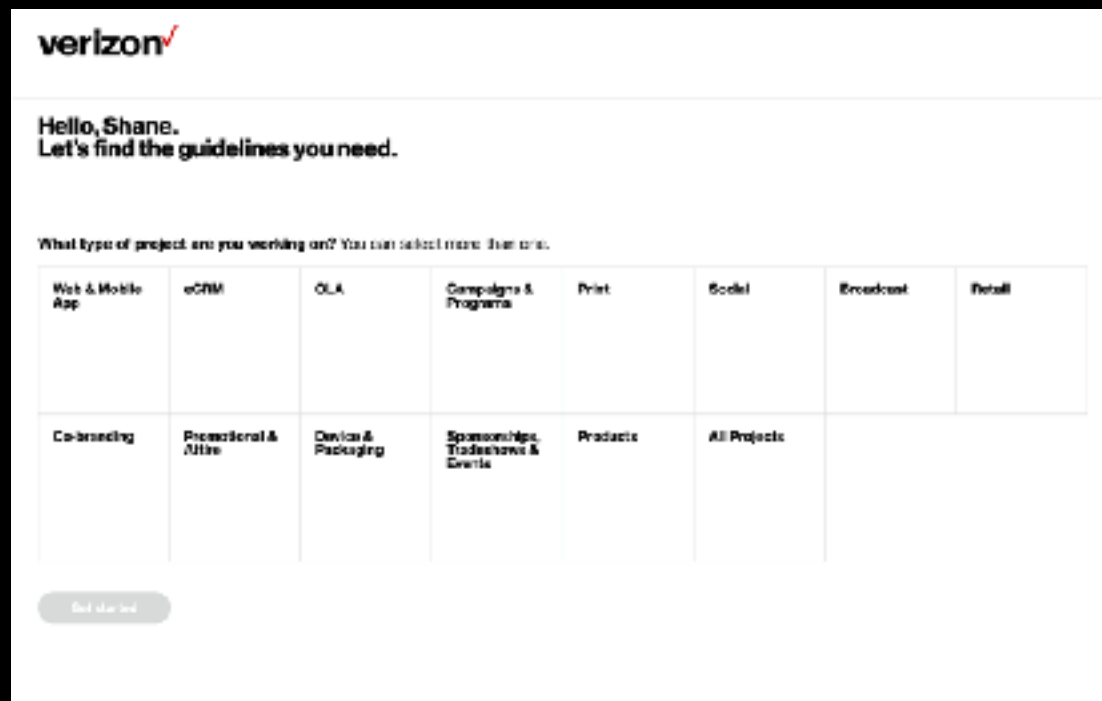
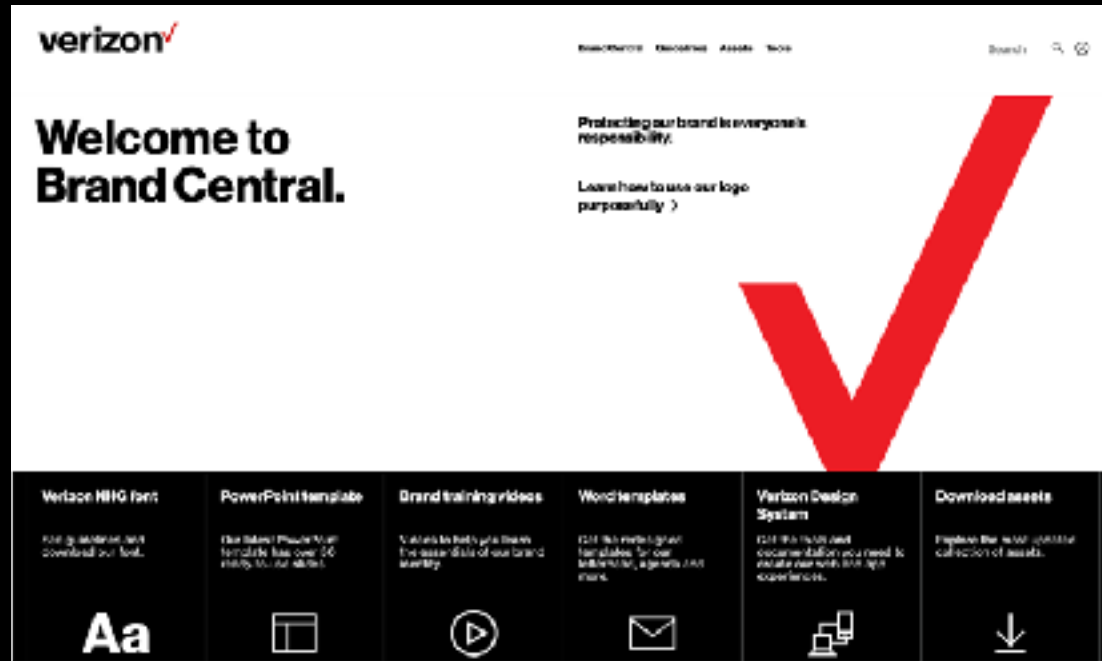
UX AUDIT

Cut steps in half for bring your own device



GUIDELINES

Web, mobile and app implementation and guidelines



THANK YOU