Intralox CUSTOMER EXPERIENCE PORTAL

PRODUCTS PLATFORMS INDUSTRIES	S NEWS & UPDATES SUPPORT	
INTRALOX SELF-SERVE	My Dashboard	Skip Header Content ×
MY DASHBOARD	Orders V Search by Order ID or customer PO number	Jump straight to the main content.
MY CUSTOMERS	My Customers	Ð
CASE CREATOR	Quick Links	Ð
	My Customers View customers that you have had interactions with.	
	Web To Case Create a case in Salesforce.	
	E Customer Orders View a list of your orders for your customers.	
	Dynamics Jump to Microsoft Dynamics	
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Intralox customers have come to expect world-class customer service, and part of those expectations is the ability to conduct routine business with Intralox online.

However, customers can only call for basic details like Tracking Numbers, Invoices, Packing Slips, Etc.

My day job at the time was developing a UI system that could be used to build Intralox's custom internal applications.

But this problem represented an opportunity to show the company what Product Design could do for Customer Experience. Marketing
CUSTOMER RESEARCH
CUSTOMER PROFILES

Engineering

CUSTOMER JOURNEY TECHNICAL EXPERTISE **Customer Service**

VOICE OF CUSTOMER MEASURABLE KPIS

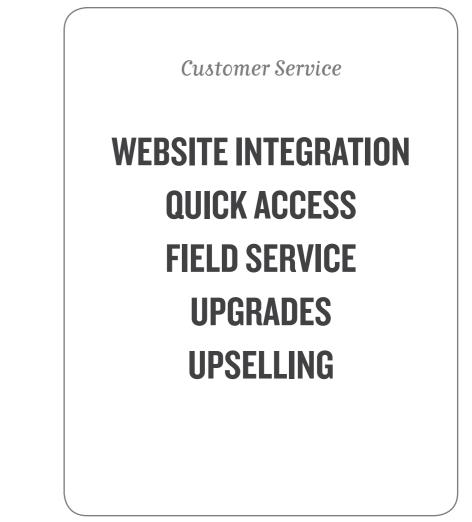
Product

OKR VISION **Defining Features**

Order Information

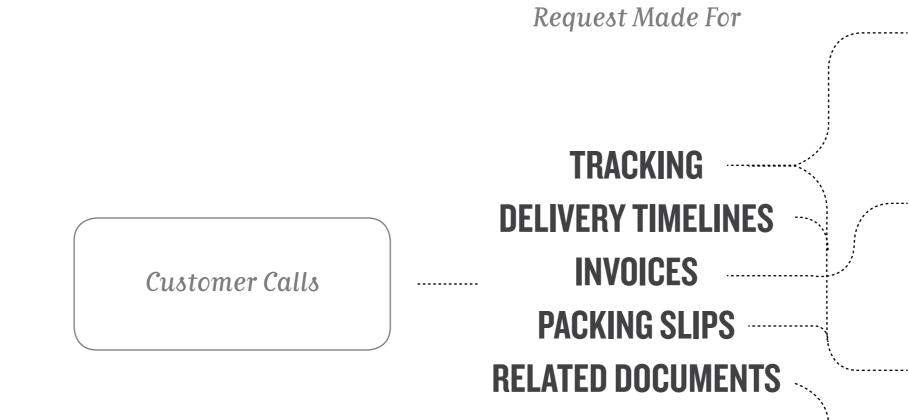
TRACKING DELIVERY TIMELINES INVOICES PACKING SLIPS RELATED DOCUMENTS Documentation

MANUALS INSTALLATION GUIDES CLEANING GUIDES CAD DRAWINGS



The initial objective was to provide Intralox's world-class customer service online by reducing the number of calls for routine information and giving customer service reps more time to focus on more important customer needs.

But there was another value proposition hiding in plain sight.



Existing Process

Customer Service

Credit Department

Shipping Department

Multiple Departments

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During research, it was discovered that our customers actually had the better experience as they only had to make one call.

In other words, our internal CS Reps could not serve the customers directly.

PRODUCTS PLATFORMS INDUSTRIES	NEWS & UPDATES SUPPORT	
INTRALOX CUSTOMER PORTAL	My Dashboard	
DASHBOARD	Product Title} - In Transit	
A MY ACCOUNTS	Expected Delivery February 11, 2019	₽
E MY ORDERS	My Orders	
MY PROJECTS	Track orders, find order documentation, re-order, etc.	
MY RESOURCES	Calclab Collaberate seamlessly and effectively.	
SUPPORT		
	Analysis Analyze your order and maintenance histories.	
	Support Get support from an Intralox representative.	
© Intralox 2019		

Pitched Dashboard

💭 GET IN TOUCH	~ ~	intralox .
Announcements		
ORDER UPDATE Order #1039290 has information here.	arrived. View	00/00/0000 order
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MY DASHBOARD	Account Search by Order ID or customer PO number	
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CASE CREATOR	Quick Links	
: CUSTOMER ORDERS	My Customers View customers that you have had interactions with.	
RESOURCES		
	Web To Case Create a case in Salesforce.	
	E Customer Orders View a list of your orders for your customers.	
	Dynamics Jump to Microsoft Dynamics	
© Intralox 2019		

Actual Dashboard

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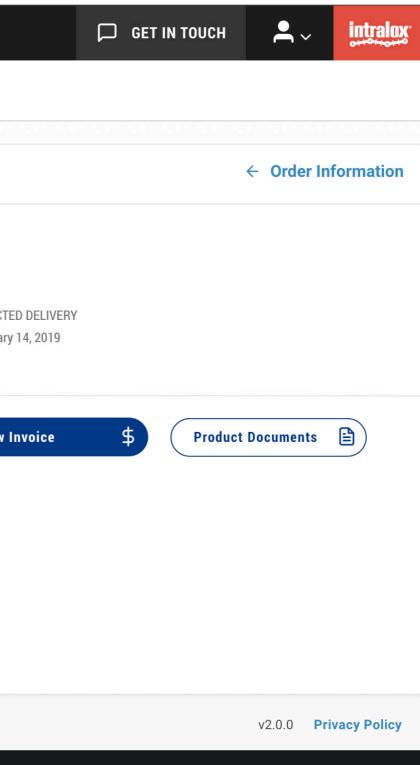
PRODUCTS PLATFORMS INDUSTRIES	NEWS & UPDATES SUPPORT	
INTRALOX CUSTOMER PORTAL	ORDER HISTORY MY INSTALLATIONS MY PROJECTS	
DASHBOARD	Order History	
MY ACCOUNTS	ORDER PLACED February 7, 2019	
: MY ORDERS	Series 550 Tight Tr	ransfer - In Transit
MY PROJECTS	Series 550 Tight Transfer Fl	uary 15, 2019 at Top belt. Ideal for tight transfers and small pro
MY RESOURCES	includes sprockets and extra	a modules.
SUPPORT	ORDER PLACED February 7, 2019	
	ThermoDrive Ribbe Delivered February 1 Series 8026 ThermoDrive Ri Order includes belt, sprocked	1, 2019 bbed V-Top E belt. Ideal for conveying small food
© Intralox 2019		

Pitched Order Views

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PRODUCTS PLATFORMS INDUSTRIES	NEWS & UPDATES SUPPORT			
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DASHBOARD	Series 550 Tight Transfer Bel	t se se se se se se		
A MY ACCOUNTS		Your order is Ir	Transit	
E MY ORDERS		ORDER PLACED	OUT FOR DELIVERY	—О
MY PROJECTS	6445	February 7, 2019	February 11, 2019	February 1
MY RESOURCES	Date of Order February 7, 2019	Delivering To John Gibby	Payment Method Master Card	View In
	Delivery Status In Transit	1234 Test Drive New Orleans, LA 70119	John Gibby 1234 Test Drive New Orleans, LA 70119	
	Tracking Number YU9029347 892347 0934098	c/o Intralox	c/o Intralox	
© Intralox 2019				

Pitched Order Views



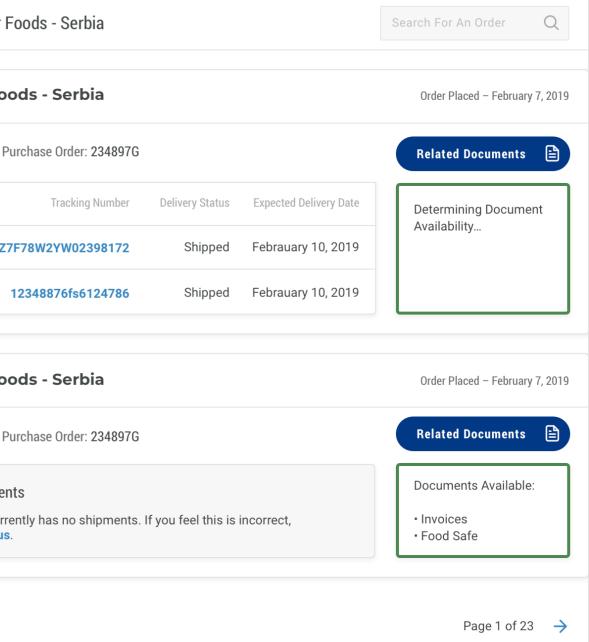
PRODUCTS PLATFORMS INDUSTRIES	NEWS & UPDATES SUPPORT			
INTRALOX CUSTOMER PORTAL	ORDER HISTORY MY INSTALLATIONS MY PROJECTS			
DASHBOARD	Series 550 Tight Transfer Belt	201201201201201		
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⋮≡ MY ORDERS		Straight Belt Series		
MY PROJECTS		Document Name		
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MY RESOURCES		Packing Slips		
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© Intralox 2019				

Pitched Order Views

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INTRALOX SELF-SERVE		← Back To Previous	Order For Superior Fo
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CASE CREATOR	Order For Superior Foods - Serbia	Order Placed – February 7, 2019	Shipment Date
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: CUSTOMER ORDERS	Shipment Date Tracking Number Delivery Status Expected Delivery Date Febrauary 7, 2019 1Z7F78W2YW02398172 Shipped Febrauary 10, 2019	Determining Document Availability	Febrauary 7, 2019
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	Order Number: 234897G Purchase Order: 234897G	Related Documents	Has No Shipme This account cur
	Has No Shipments This account currently has no shipments. If you feel this is incorrect, please contact us.	Documents Available: • Invoices • Food Safe	please contact u
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Actual Order Views



PRODUCTS PLATFORMS INDUS	STRIES NEWS & UPDATES SUPPORT			•	· · intralox	Docur	ment Name
INTRALOX SELF-SERVE	ALL ORDERS CUSTOMER ORDERS	OPEN ORDERS		← Ba	ck To Previous	¢	Invoice #234345
MY DASHBOARD	Order For Superior Foods -	Serbia		Search For An	Order Q	¢	Invoice #345978
MY CUSTOMERS	Related Documents		Purchase Ord	der: 234897G Order	Number: 234897G	¢	Packing Slip #234
CASE CREATOR	Document Name		Document Type	File Type	File Size 🗘		
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COSTOMENTONDENS	() Invoice #345978	1	Invoice	PDF	10kb	G	MPB Series 800
	Packing Slip #234	A	Packing Slip	PDF	13kb		
	Packing Slip #234	Ø	Packing Slip	PDF	18kb	¢	BPA Free Certificate
	() MPB Series 800	Ø	Technical Document	PDF	18kb	¢	Allergen Certificate
	BPA Free Certificate		General Document	PDF	138kb	¢	Food Safe Certificat
	↓ Allergen Certificate		General Document	PDF	13kb		
	G Food Safe Certificate for A	cetol	Food Safe	PDF	420kb		
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Actual Order Views

		Document Type	File Type
34345	Ø	Invoice	PDF
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ip #234	Ą	Packing Slip	PDF
ip #234	Ø	Packing Slip	PDF
s 800	Ø	Technical Document	PDF
Certificate		General Document	PDF
ertificate		General Document	PDF
Certificate for Acetol		Food Safe	PDF

Shipmen	t Date		Tracking Number	Delivery Status	Expec	ted Delivery Date
Febraua	ary 7, 2019	1Z7F78	W2YW02398172	Shipped	Febra	auary 10, 2019
Febraua	ary 7, 2019	1234	18876fs6124786	Shipped	Febra	auary 10, 2019
Doc	ument Name		Documen	t Type	File Type	File Size 🔇
	Invoice #234345	Ø	In	voice	PDF	800kb
	Invoice #345978	1	In	voice	PDF	10kb
	Packing Slip #234	4	Packing	g Slip	PDF	13kb
	Packing Slip #234	Ø	Packing	g Slip	PDF	18kb
	MPB Series 800	Ø	Technical Docu	ment	PDF	18kb
	BPA Free Certificate		General Docu	ment	PDF	138kb
	Allergen Certificate		General Docu	ment	PDF	13kb
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(Order	23489	97G For Superior Foc
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Upcoming Order Views

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•	1	Invoice	PDF	10kb
	🔊 Pack	ing Slip	PDF	13kb
•	Pack	ing Slip	PDF	18kb
	Technical Do	cument	PDF	18kb
	General Do	cument	PDF	138kb
	General Do	cument	PDF	13kb
cetol	Fo	od Safe	PDF	420kb

The application became an Operational Excellence play. Almost every transaction completed by a CS Rep represents one less call to another department, representing massive time savings. Request Made For

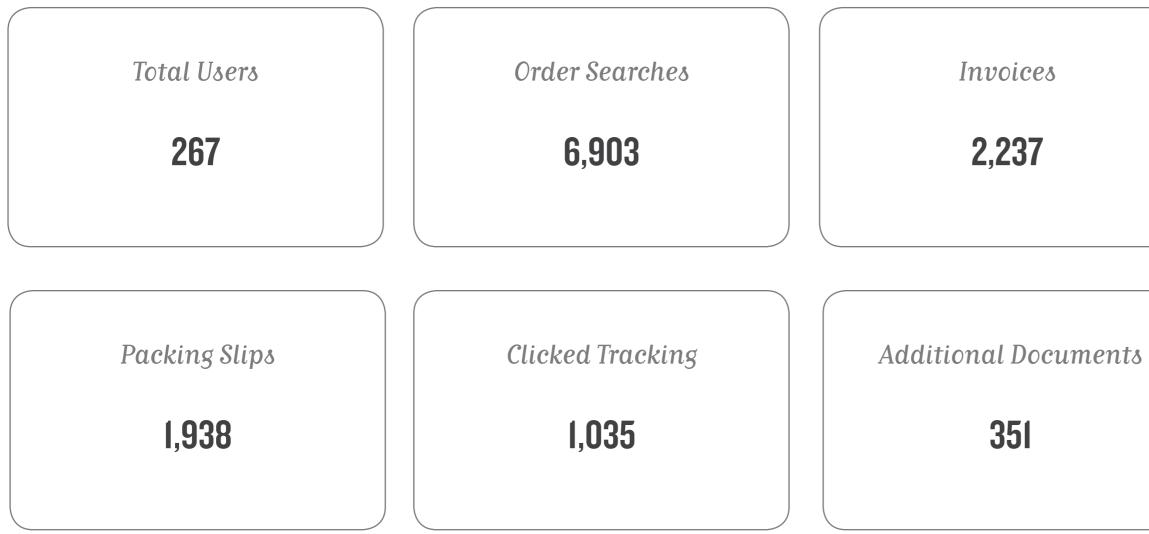
Customer Calls

TRACKING DELIVERY TIMELINES INVOICES PACKING SLIPS RELATED DOCUMENTS

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CXP Process

CXP Provides



By The Numbers

Between September 1, 2021 & Mar 20, 2022

15 MINUTES/CALL 1,726 COMPANY HOURS SAVED

PER MONTH ~247 COMPANY HOURS SAVED

MONTHLY COMPANY SAVINGS

~\$50,000

"It definitely saved time because the customer that we were working with was an e-billing customer. What that means is that they are set up as a no print customer, so to be able to run a print job in Oracle, we would have had to go in and set each INVOICE as print (which is a step within itself) and THEN go and run the print jobs, so it DEFINITELY saved time. The e-billing customers is definitely where this is going to save time for sure on the credit teams end.

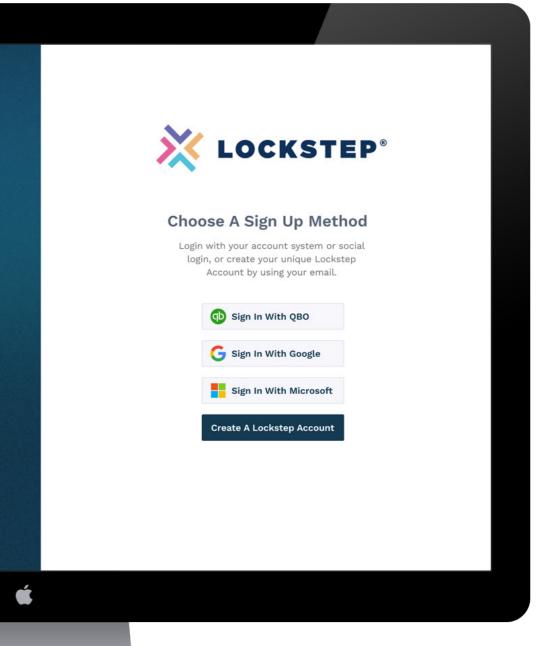
I was grateful to have it!"

- Shelley Adams upon completing an Invoice Audit for UPS using CXP

C'est Fin

Lockstep ONBOARDING EVOLUTION





Lockstep was a series A startup working on solving the problem of disconnected accounting practices. Because accounting has two clear and distinct services - recievables and payments - Lockstep needed an onbording system that could onboard users to a variety of products Lockstep was developing.

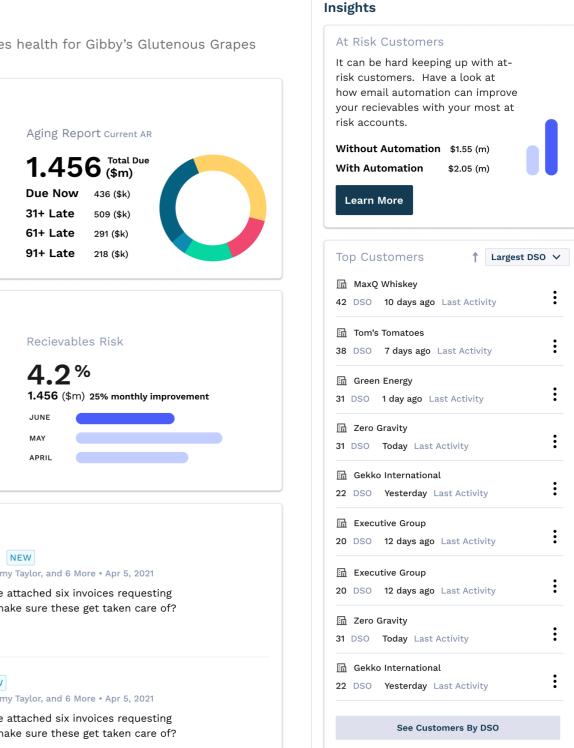
And some of these products weren't even for Accountants.

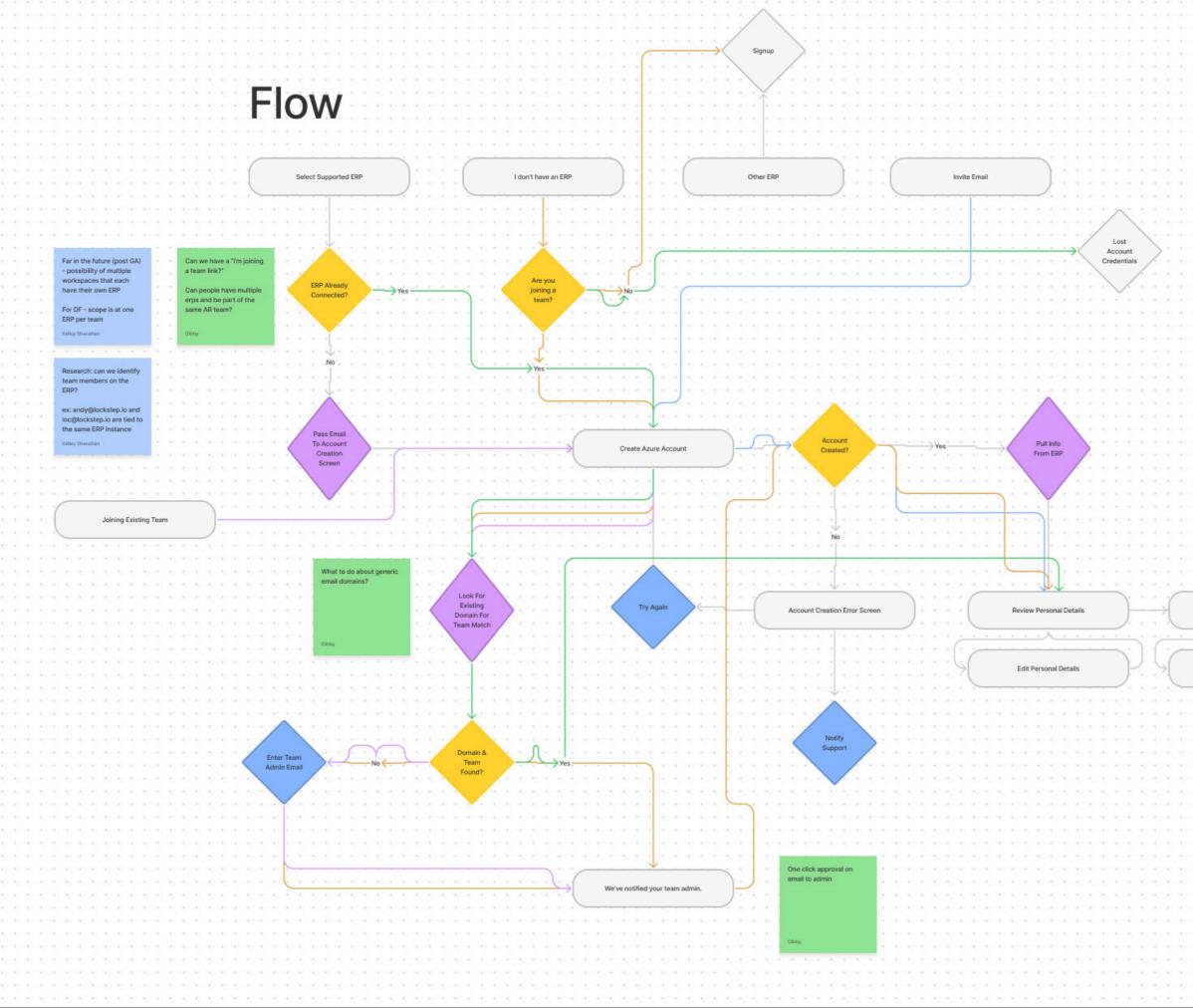
The onboarding flow was largely driven by the technical requirements to onboard a user to the dashboard you see here.

Namely, our assumptions were that a user would be required to add their accounting system and email to get to this screen.

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	Ċ	Unassigned	12	Accounting Reports
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	W	MaxQ Whiskey		Recievables Reports
	т	Tom's Tomatoes		Recievables Summary
	G	Gekko International		\$1,456,000
	L	Lockstep.com		30 day historical
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	Μ	Malazanian Empire		
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	Е	Executive Group		immediate payment. Can you ma
	Μ	Malazanian Empire		
	G	Green Energy		Tom Green Email @6 NEW
	F	Evocutivo Group		To Raychel Green, Joshua Wine, Timm Raychel, our vendor sent us the
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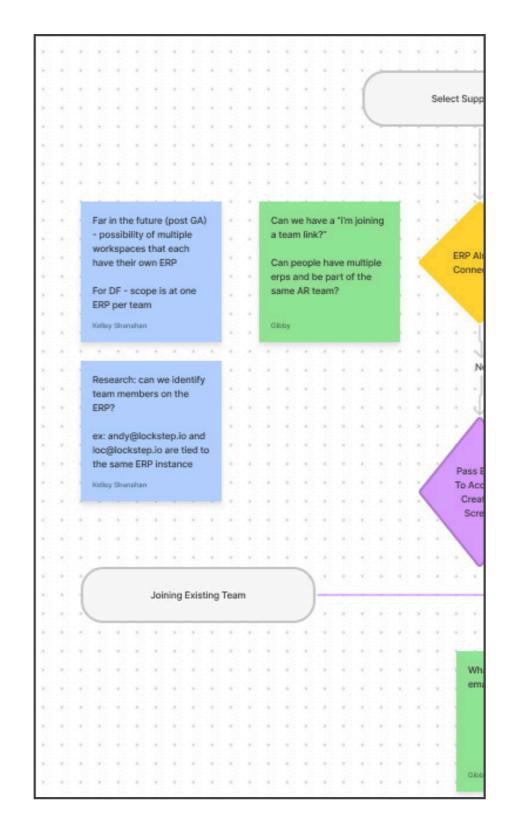
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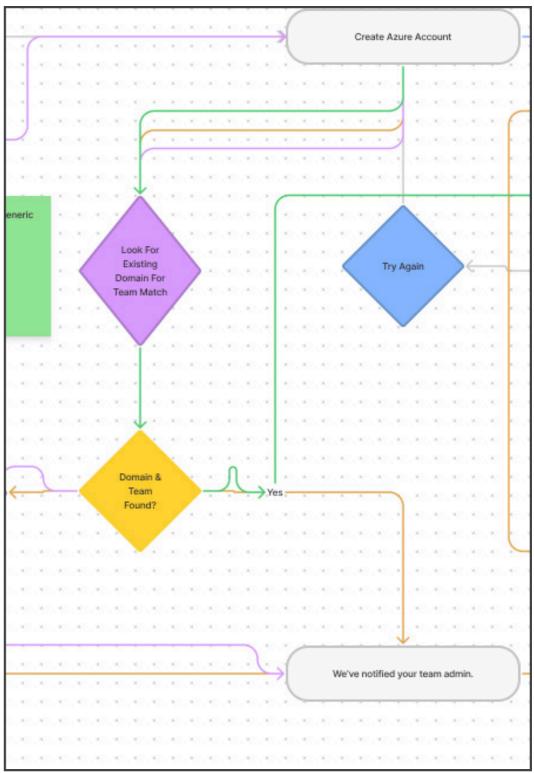
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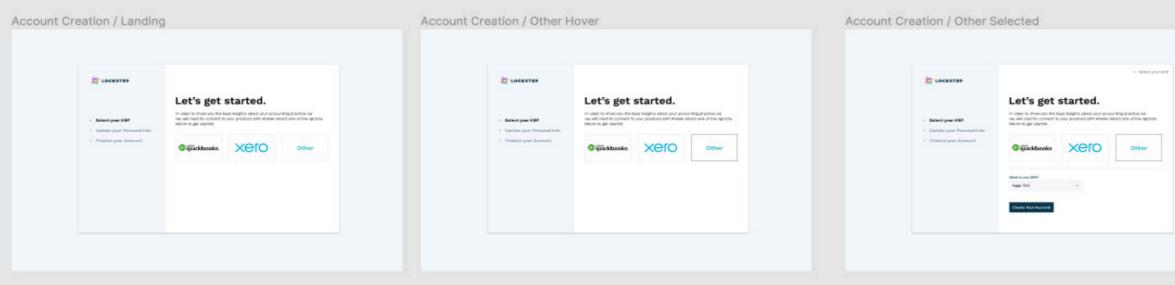
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We used these user flow sessions as postups to establish affinity maps and understand business requirements.

The results of these sessions would be turned into prototypes to show how a user would flow through the product and when requirements would be gathered in the onboarding experience.



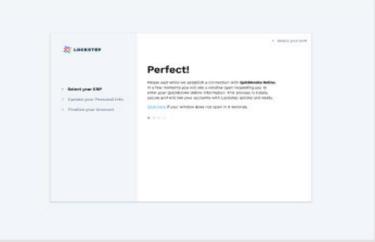




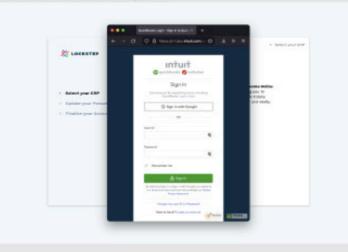
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Account Creation / QBO Selected



Account Creation / QBO Pop Out



Account Creation / Personal Info

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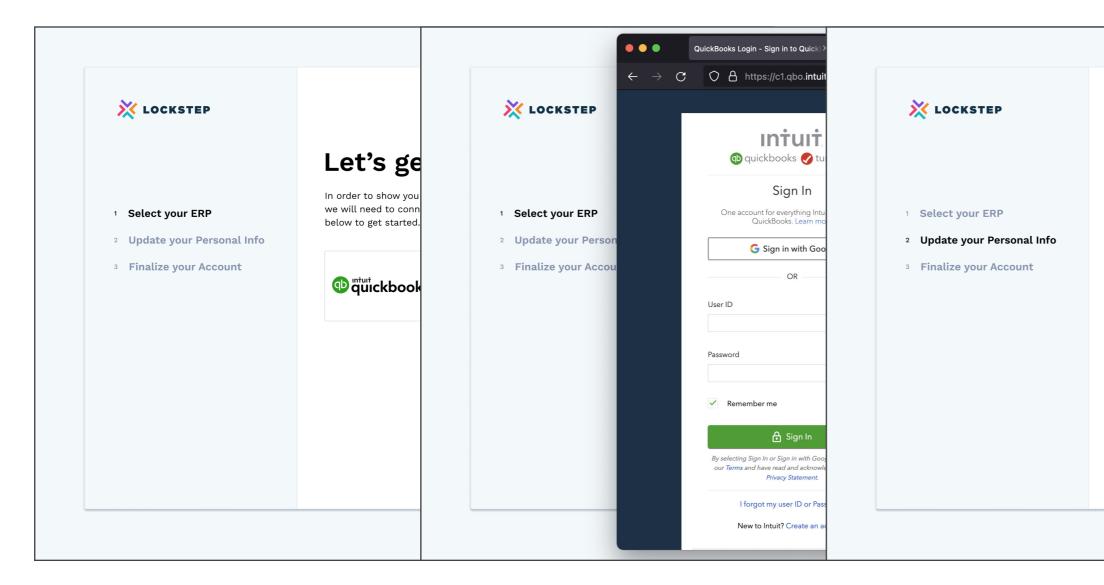
Other / Account Cr

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The general philosophy we wanted to follow was to limit the number of edits a user had to make by pulling information in from connected systems.

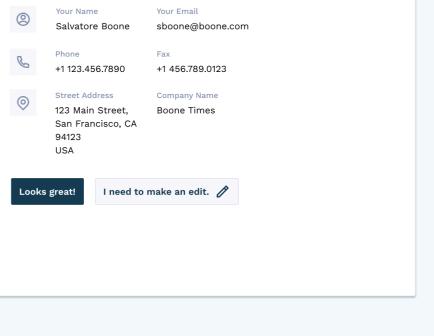
We paired this with a step counter to show the user's progress (and hopefully how little they have left to complete).



The Crucial Flow

Success!

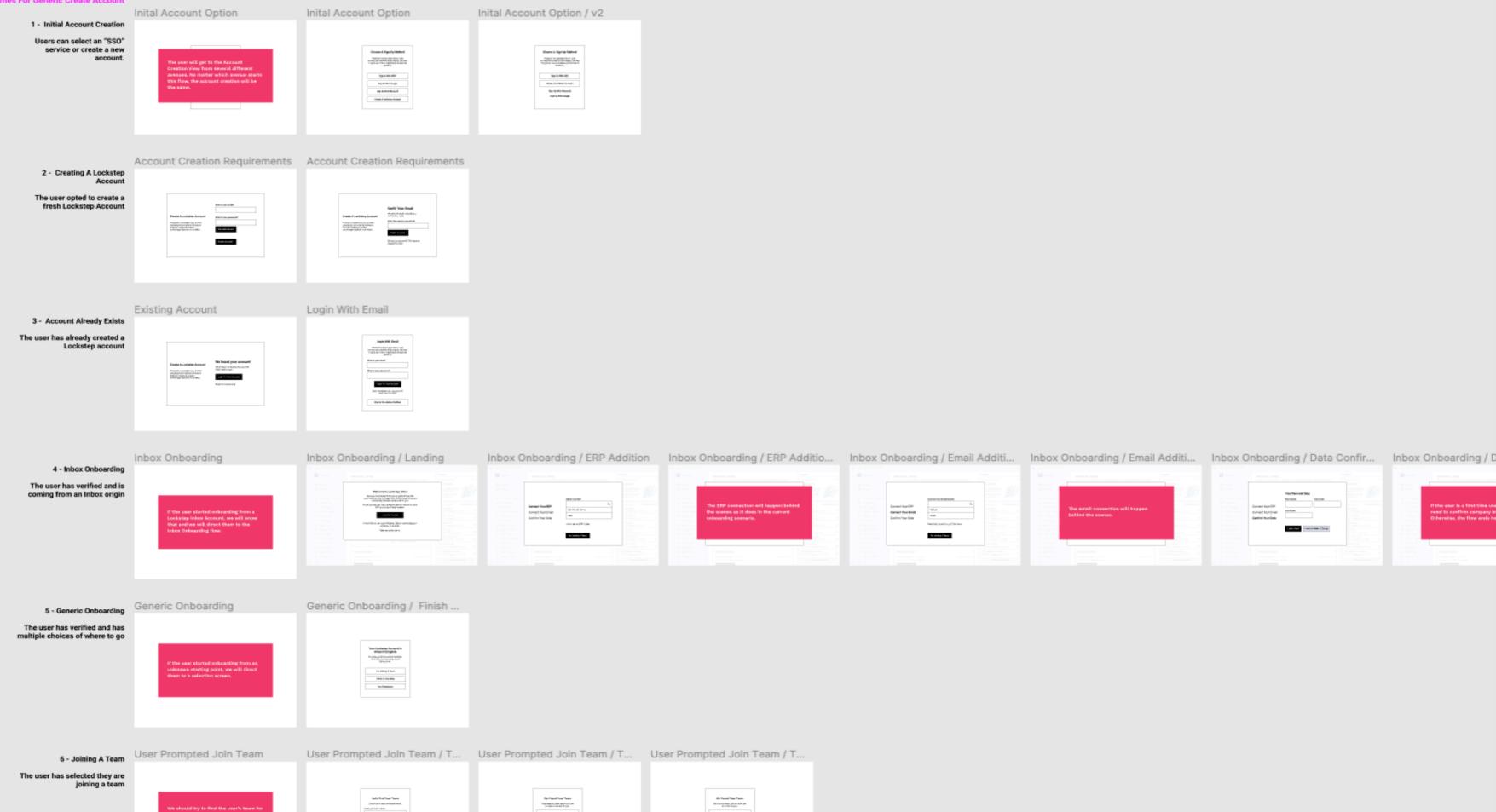
Now let's make sure your information is correct.



This approach was tested and validated with users, but engineering had a hard time pulling the information from social logins. We opted to test this while we worked on other options. At the very least, we'd get valuable data and feedback.

We learned that auto populating is crucial, and importantly – asking for too much information upfront resulted in major dropoffs.

Wireframes For Generic Create Account



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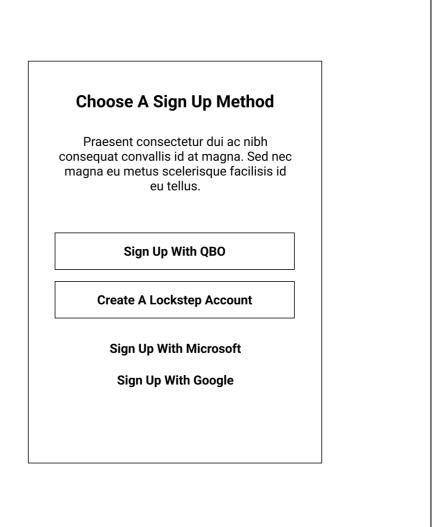




In going back to raw wireframes, the goal was to establish an OKR that engineering and product could agree to.

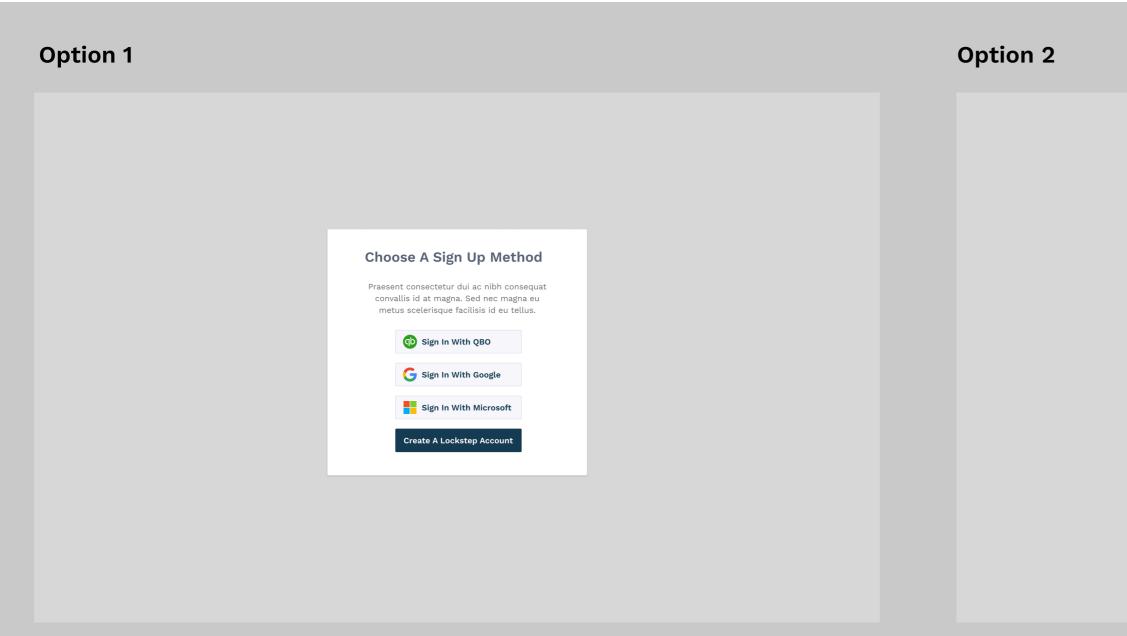
We want to simplify the account creation process to reduce the amount of user drop offs and reduce the amount of engineering overhead in creating an account."

Choose A Sign U	p Method
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Sign In With G	oogle
Sign In With Mid	crosoft
Create A Lockstep	Account

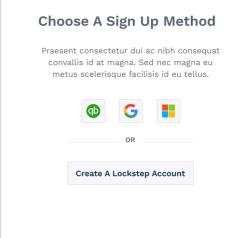


After working with engineering and stakeholders we were able to get agreement on a major shift in how we approached onboarding. We would no longer ask for personal or accounting system information upfront. Instead, that would move to individual app onboarding experience where needed.

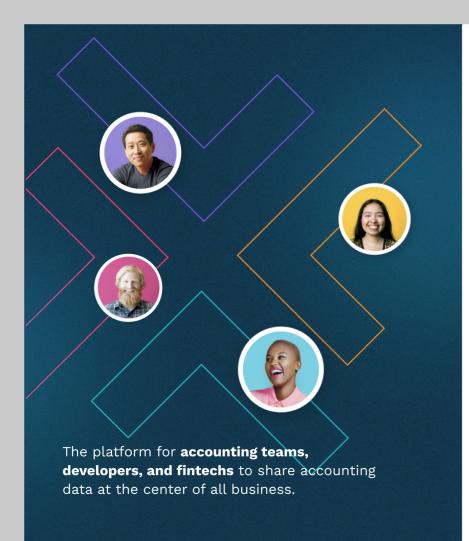
This also gave us a new opportunity. Because account creation was so simple, if a user were to drop off at another app, we had the ability to contact that user for user interviews or for marketing efforts.



Hi-Fidelity Options



Option 3





Choose A Sign Up Method

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Create A Lockstep Account

Option 4



Hi-Fidelity Options



Choose A Sign Up Method

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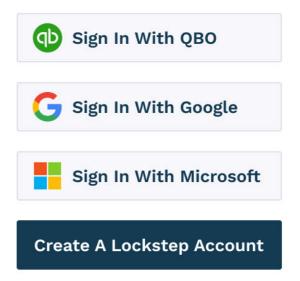






Choose A Sign Up Method

Login with your account system or social login, or create your unique Lockstep Account by using your email.



The platform for **accounting teams**, **developers**, and fintechs to share accounting data at the center of all business.

Verify your email.

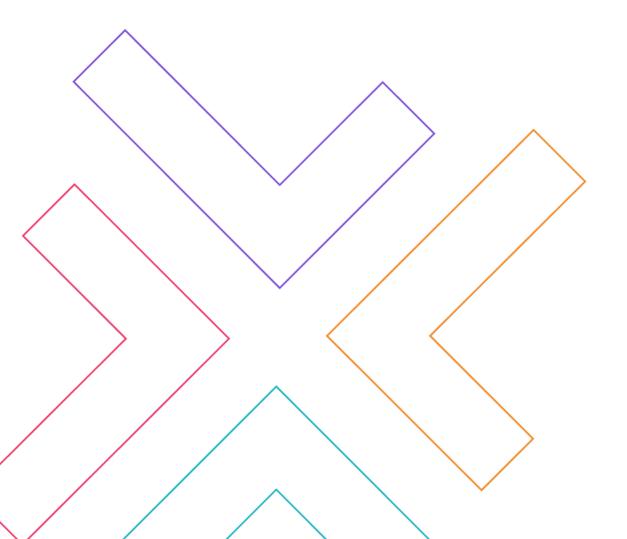
We sent an email containing a verification code.

Did not get an email? <u>Click here</u> to resend the code.

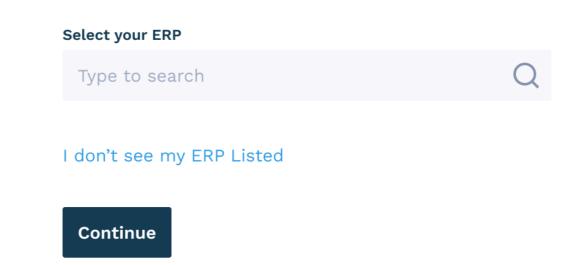
Welcome to Lockstep Inbox

We here at Lockstep think you're going to love the automated activity management solutions and ehanced accounting features we've built for you.

If you'd like to see some features before connecting your systems, no worries. Skip and take me to the demo.



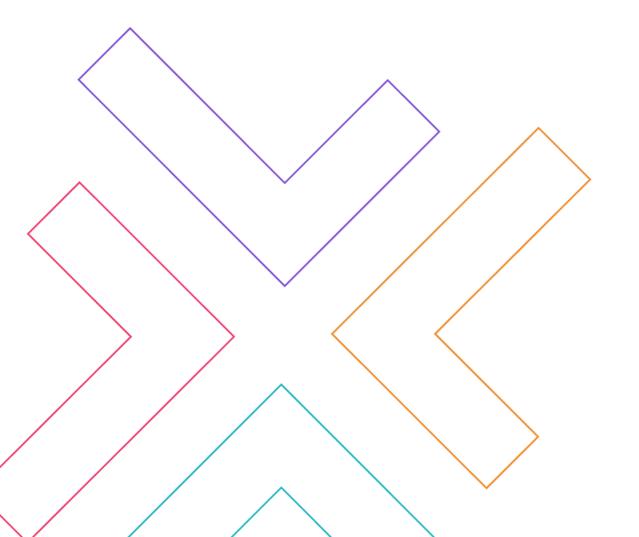
To get you started, we're going to need to connect to your ERP and to your Email System.



Welcome to Lockstep Inbox

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Great job! Now you need to connect your email.

Select your email system

Type to search

Continue





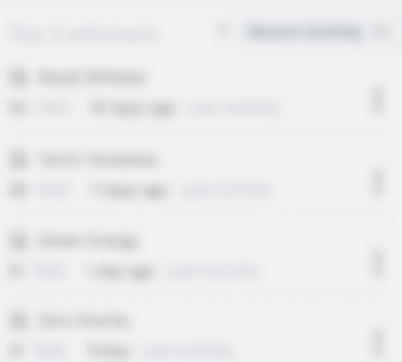
You're all done, we have everything we need.

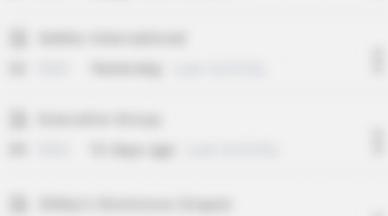
This message will dissappear in 30 seconds, or you can click below to close this window and start experiencing all the wonderful features we're thrilled to bring to you.

Let's get started









The implementation of this flow resulted in account conversions increasing from a paltry 10% to roughly 70%. And while we did not have specific onboarding analytics due to the previous implementation, we are seeing full onboarding converting at roughly 50%.

And because accounts were created before onboarding, we now have a communication channel to reach out to users to both understand what is failing with conversions and to entice them to complete onboarding via marketing efforts.