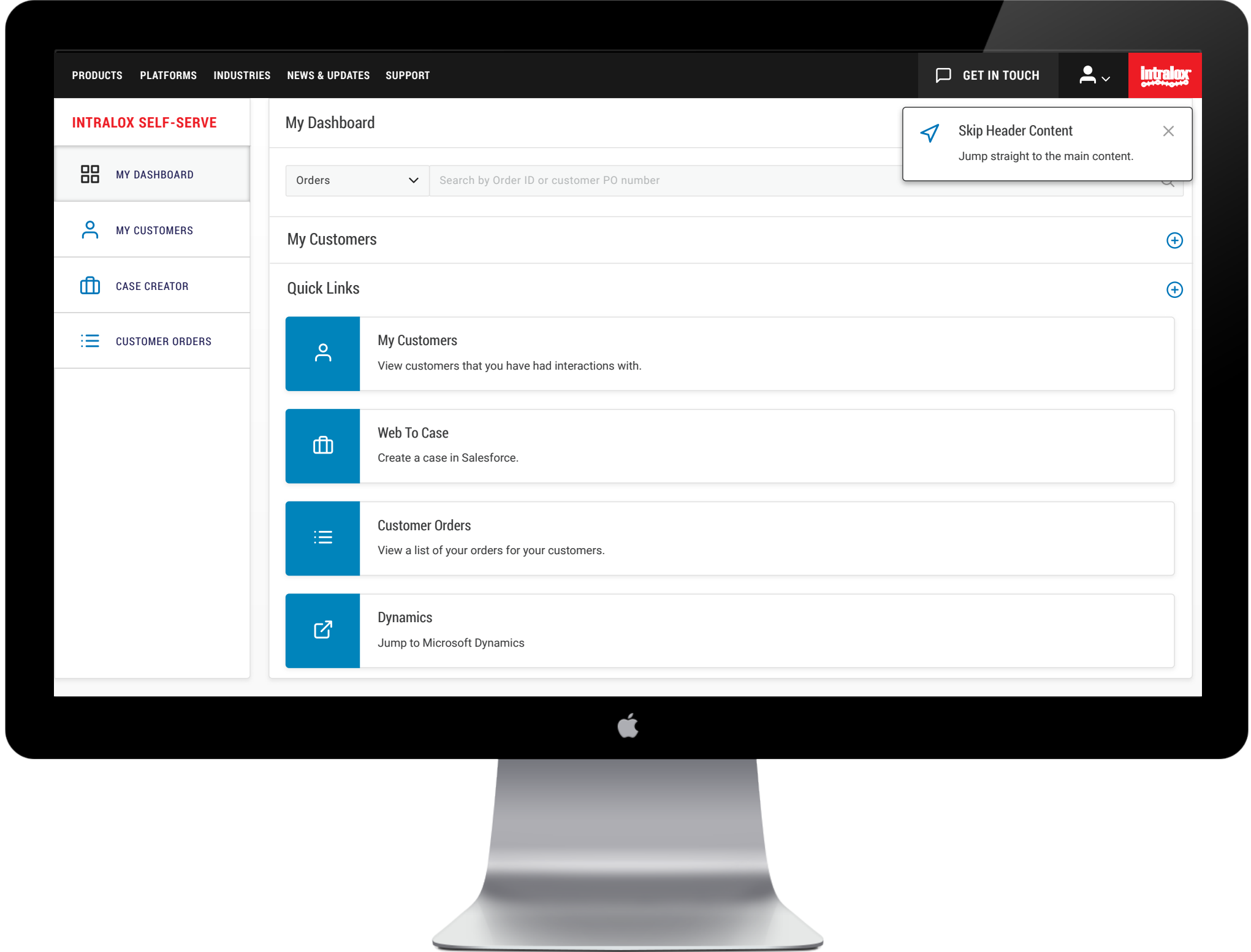


Intralox

# CUSTOMER EXPERIENCE PORTAL

---



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**

*Customer Service*

**VOICE OF CUSTOMER  
MEASURABLE KPIS**

*Engineering*

**CUSTOMER JOURNEY  
TECHNICAL EXPERTISE**

*Product*

**OKR  
VISION**

*Defining Features*

---

*Order Information*

**TRACKING**  
**DELIVERY TIMELINES**  
**INVOICES**  
**PACKING SLIPS**  
**RELATED DOCUMENTS**

*Documentation*

**MANUALS**  
**INSTALLATION GUIDES**  
**CLEANING GUIDES**  
**CAD DRAWINGS**

*Customer Service*

**WEBSITE INTEGRATION**  
**QUICK ACCESS**  
**FIELD SERVICE**  
**UPGRADES**  
**UPSELLING**



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 Calls

Request Made For

**TRACKING**  
**DELIVERY TIMELINES**  
**INVOICES**  
**PACKING SLIPS**  
**RELATED DOCUMENTS**

Customer Service

Credit Department

Shipping Department

Multiple Departments


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.*




PRODUCTSPLATFORMSINDUSTRIESNEWS & UPDATESSUPPORT


GET IN TOUCH








INTRALOX SELF-SERVE

MY DASHBOARD

MY CUSTOMERS

CASE CREATOR

CUSTOMER ORDERS

RESOURCES


My Dashboard

Account

Search by Order ID or customer PO number


My Customers

Quick Links




My Customers

View customers that you have had interactions with.




Web To Case

Create a case in Salesforce.



Customer Orders

View a list of your orders for your customers.



Dynamics

Jump to Microsoft Dynamics

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v2.0.0

Privacy Policy

Actual Dashboard


PRODUCTSPLATFORMSINDUSTRIESNEWS & UPDATESSUPPORT


GET IN TOUCH





INTRALOX CUSTOMER PORTAL


ORDER HISTORYMY INSTALLATIONSMY PROJECTS


DASHBOARD

MY ACCOUNTS

MY ORDERS

MY PROJECTS

MY RESOURCES

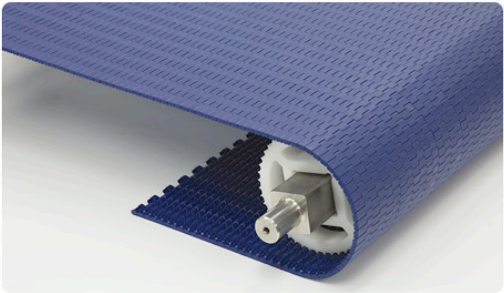
SUPPORT

Order History

Search for an order

ORDER PLACEDFebruary 7, 2019

ORDER # 12309138



Series 550 Tight Transfer - In Transit

Expected DeliveryFebruary 15, 2019


Series 550 Tight Transfer Flat Top belt. Ideal for tight transfers and small products. Order includes sprockets and extra modules.

Track This Shipment

Product Documents

ORDER PLACEDFebruary 7, 2019

ORDER # 12309138



ThermoDrive Ribbed V-Top E

DeliveredFebruary 11, 2019

Series 8026 ThermoDrive Ribbed V-Top E belt. Ideal for conveying small food products. Order includes belt, sprockets, limiters, and drive unit.

Product Documents

Re-Order Product

Upgrade Available

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Pitched Order Views



PRODUCTSPLATFORMSINDUSTRIESNEWS & UPDATESSUPPORT


GET IN TOUCH








INTRALOX CUSTOMER PORTAL


ORDER HISTORYMY INSTALLATIONSMY PROJECTS


DASHBOARD

MY ACCOUNTS

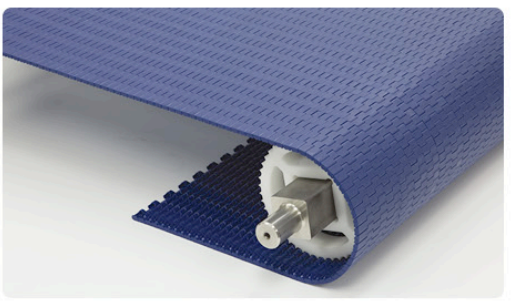
MY ORDERS

MY PROJECTS

MY RESOURCES

SUPPORT

Series 550 Tight Transfer Belt



Your order is **In Transit**

ORDER PLACED  
February 7, 2019

OUT FOR DELIVERY  
February 11, 2019

EXPECTED DELIVERY  
February 14, 2019

Date of Order  
February 7, 2019

Delivery Status  
In Transit

Tracking Number  
YU9029347 892347 0934098

Delivering To  
John Gibby  
1234 Test Drive  
New Orleans, LA 70119  
c/o Intralox

Payment Method  
Master Card

John Gibby  
1234 Test Drive  
New Orleans, LA 70119  
c/o Intralox

View Invoice

\$

Product Documents

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Pitched Order Views







PRODUCTSPLATFORMSINDUSTRIESNEWS & UPDATESSUPPORT

INTRALOX SELF-SERVE

MY DASHBOARD

MY CUSTOMERS

CASE CREATOR

CUSTOMER ORDERS

ALL ORDERSCUSTOMER ORDERSOPEN ORDERS

← Back To Previous

Open Orders for Superior Foods - Serbia

Search For An Order

Order For Superior Foods - Serbia

Order Placed – February 7, 2019

Order Number: 234897G   Purchase Order: 234897G

Related Documents

Shipment Date	Tracking Number	Delivery Status	Expected Delivery Date
February 7, 2019	1Z7F78W2YW02398172	Shipped	February 10, 2019
February 7, 2019	12348876fs6124786	Shipped	February 10, 2019

Determining Document Availability...

Order For Superior Foods - Serbia

Order Placed – February 7, 2019

Order Number: 234897G   Purchase Order: 234897G

Related Documents

Has No Shipments

This account currently has no shipments. If you feel this is incorrect, please [contact us](#).

Documents Available:

- Invoices
- Food Safe

Rows Per Page 2Page 1 of 23

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Open Orders for Superior Foods - Serbia

Search For An Order

Order For Superior Foods - Serbia

Order Placed – February 7, 2019

Order Number: 234897G   Purchase Order: 234897G

Related Documents

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- Food Safe

Rows Per Page 2Page 1 of 23

Actual Order Views

PRODUCTSPLATFORMSINDUSTRIESNEWS & UPDATESSUPPORT

INTRALOX SELF-SERVE

MY DASHBOARD

MY CUSTOMERS

CASE CREATOR

CUSTOMER ORDERS

ALL ORDERSCUSTOMER ORDERSOPEN ORDERS

Back To Previous

Order For **Superior Foods - Serbia**

Search For An Order

Related Documents

Purchase Order: 234897G    Order Number: 234897G

Document Name	Document Type	File Type	File Size
Invoice #234345	Invoice	PDF	800kb
Invoice #345978	Invoice	PDF	10kb
Packing Slip #234	Packing Slip	PDF	13kb
Packing Slip #234	Packing Slip	PDF	18kb
MPB Series 800	Technical Document	PDF	18kb
BPA Free Certificate	General Document	PDF	138kb
Allergen Certificate	General Document	PDF	13kb
Food Safe Certificate for Acetol	Food Safe	PDF	420kb

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Privacy Policy

Document Name	Document Type	File Type
Invoice #234345	Invoice	PDF
Invoice #345978	Invoice	PDF
Packing Slip #234	Packing Slip	PDF
Packing Slip #234	Packing Slip	PDF
MPB Series 800	Technical Document	PDF
BPA Free Certificate	General Document	PDF
Allergen Certificate	General Document	PDF
Food Safe Certificate for Acetol	Food Safe	PDF


Actual Order Views


Order 234897G For **Superior Foods - Serbia**

Shipment Date	Tracking Number	Delivery Status	Expected Delivery Date
February 7, 2019	1Z7F78W2YW02398172	Shipped	February 10, 2019
February 7, 2019	12348876fs6124786	Shipped	February 10, 2019














<input type="checkbox"/>	Document Name	Document Type	File Type	File Size	
<input type="checkbox"/>	 Invoice #234345		Invoice	PDF	800kb
<input type="checkbox"/>	 Invoice #345978		Invoice	PDF	10kb
<input type="checkbox"/>	 Packing Slip #234		Packing Slip	PDF	13kb
<input type="checkbox"/>	 Packing Slip #234		Packing Slip	PDF	18kb
<input type="checkbox"/>	 MPB Series 800		Technical Document	PDF	18kb
<input type="checkbox"/>	 BPA Free Certificate		General Document	PDF	138kb
<input type="checkbox"/>	 Allergen Certificate		General Document	PDF	13kb
<input type="checkbox"/>	 Food Safe Certificate for Acetol		Food Safe	PDF	420kb

Order 234897G For **Superior Foods - Serbia**

 2

 2

Shipment Date	Tracking Number	Delivery Status	Expected Delivery Date
February 7, 2019	1Z7F78W2YW02398172	Shipped	February 10, 2019
February 7, 2019	12348876fs6124786	Shipped	February 10, 2019

<input type="checkbox"/>	Document Name	Document Type	File Type	File Size	
<input checked="" type="checkbox"/>	 Invoice #234345		Invoice	PDF	800kb
<input type="checkbox"/>	 Invoice #345978		Invoice	PDF	10kb
<input checked="" type="checkbox"/>	 Packing Slip #234		Packing Slip	PDF	13kb
<input type="checkbox"/>	 Packing Slip #234		Packing Slip	PDF	18kb
<input type="checkbox"/>	 MPB Series 800		Technical Document	PDF	18kb
<input type="checkbox"/>	 BPA Free Certificate		General Document	PDF	138kb
<input type="checkbox"/>	 Allergen Certificate		General Document	PDF	13kb
<input type="checkbox"/>	 Food Safe Certificate for Acetol		Food 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.

CXP Process

*Customer Calls*

*Request Made For*

**TRACKING  
DELIVERY TIMELINES  
INVOICES  
PACKING SLIPS  
RELATED DOCUMENTS**

*CXP Provides*

*Total Users*

**267**

*Order Searches*

**6,903**

*Invoices*

**2,237**

*Packing Slips*

**1,938**

*Clicked Tracking*

**1,035**

*Additional Documents*

**351**

*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**

*By The Numbers*

---

“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*





*Lockstep*  
**ONBOARDING EVOLUTION**

---

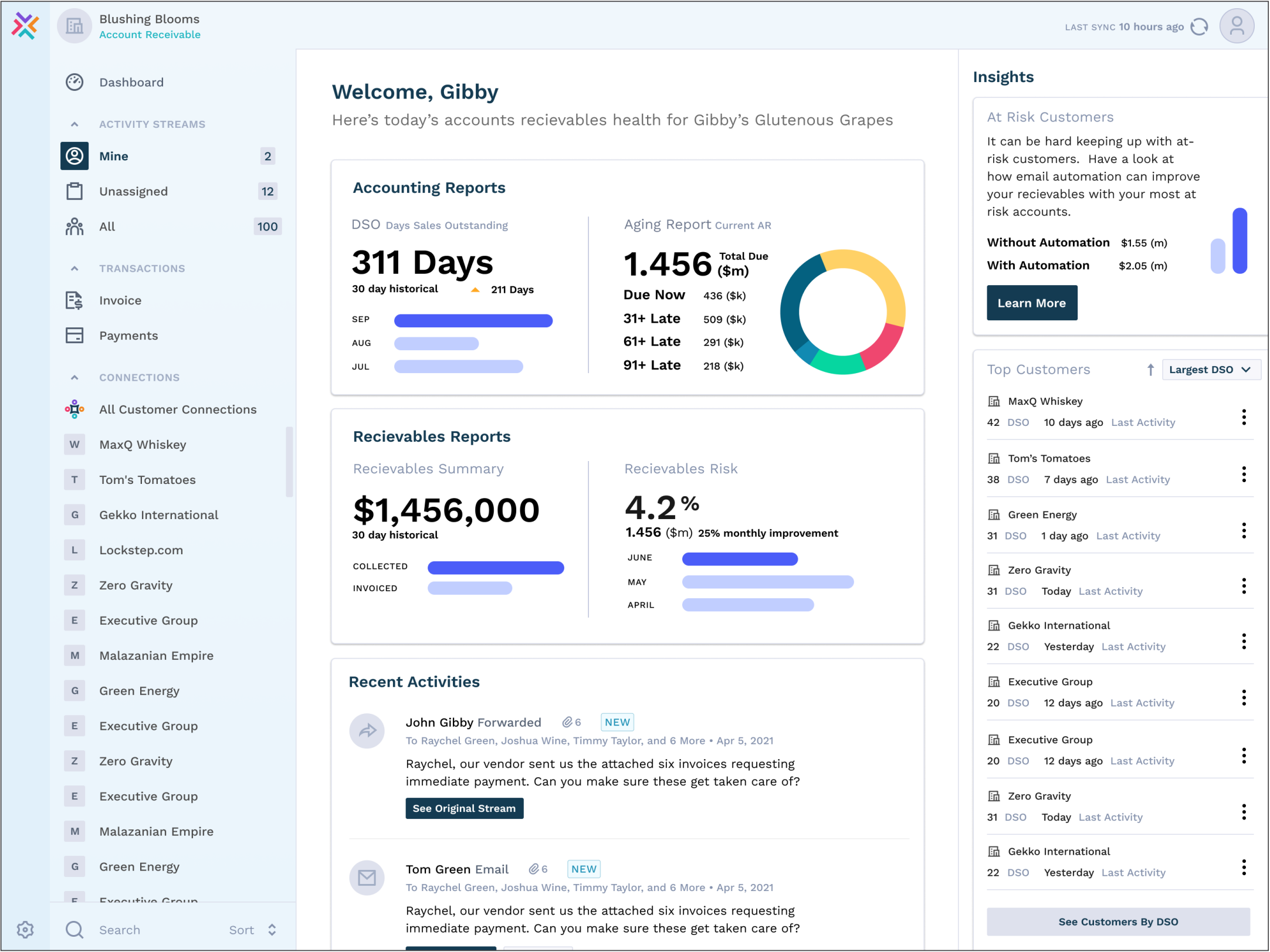


Lockstep was a series A startup working on solving the problem of disconnected accounting practices. Because accounting has two clear and distinct services - receivables and payments - Lockstep needed an onboarding system that could onboard users to a variety of products Lockstep was developing.

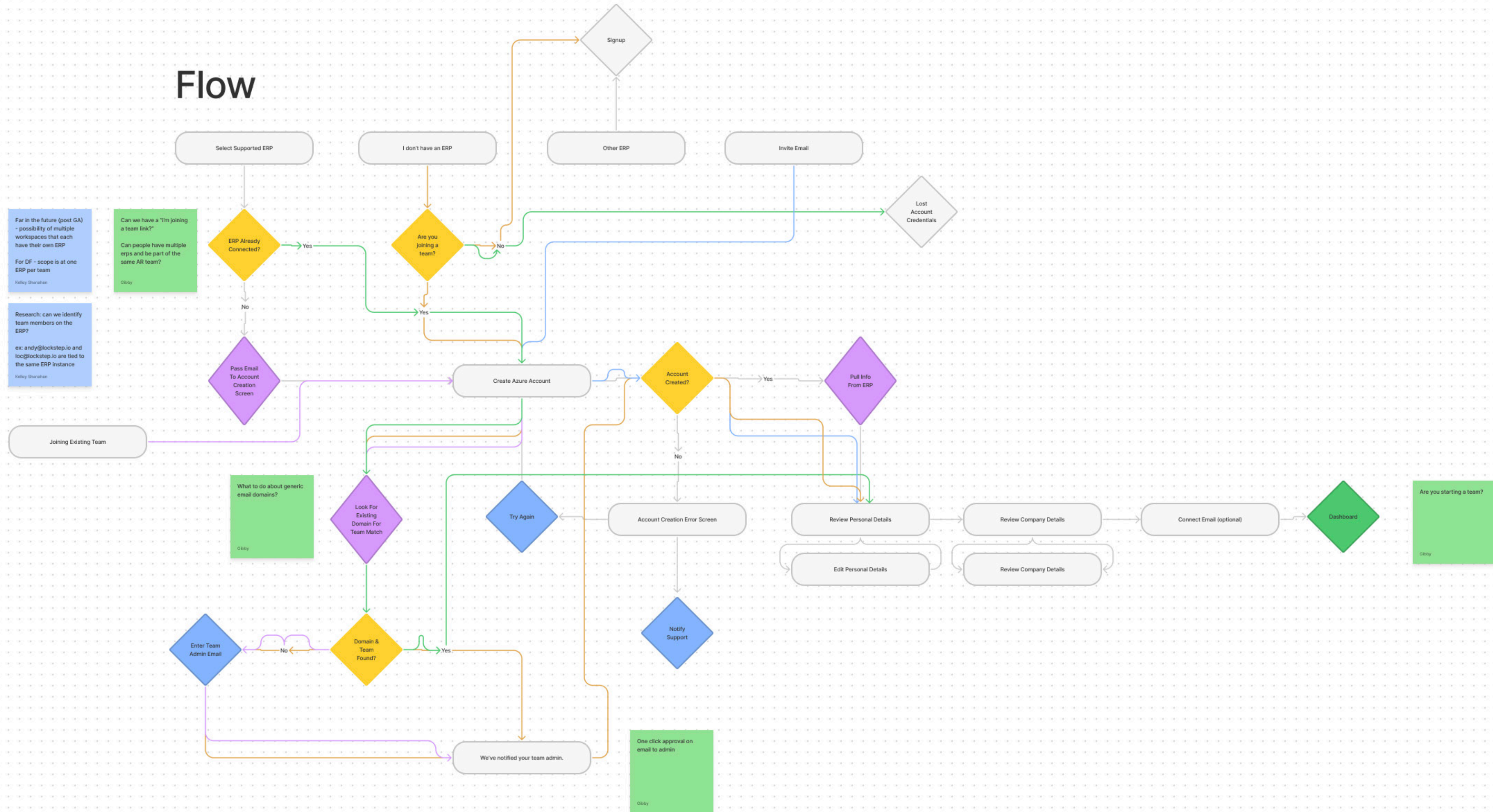
*And some of these products weren't even for Accountants.*

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.



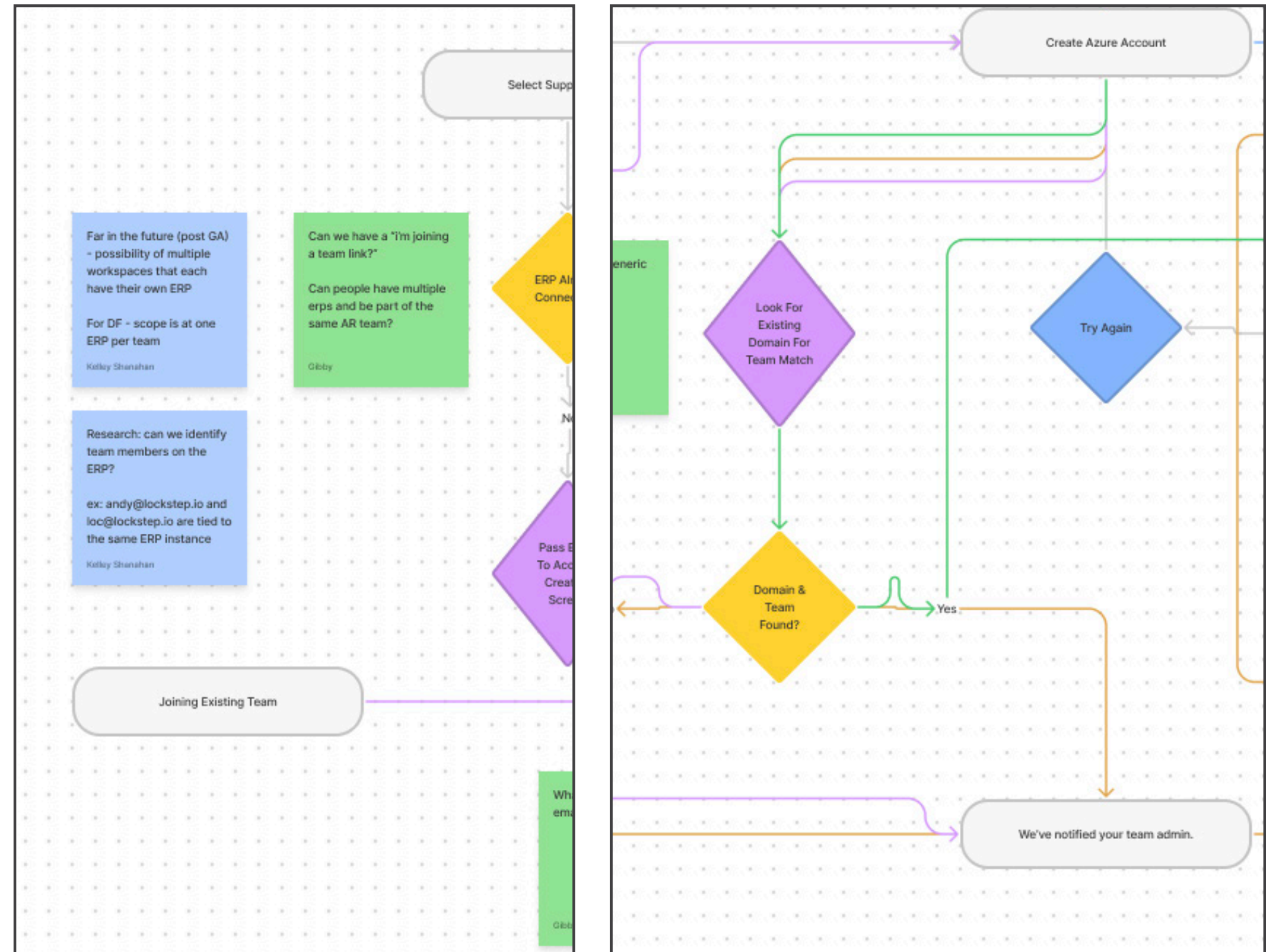
# Flow



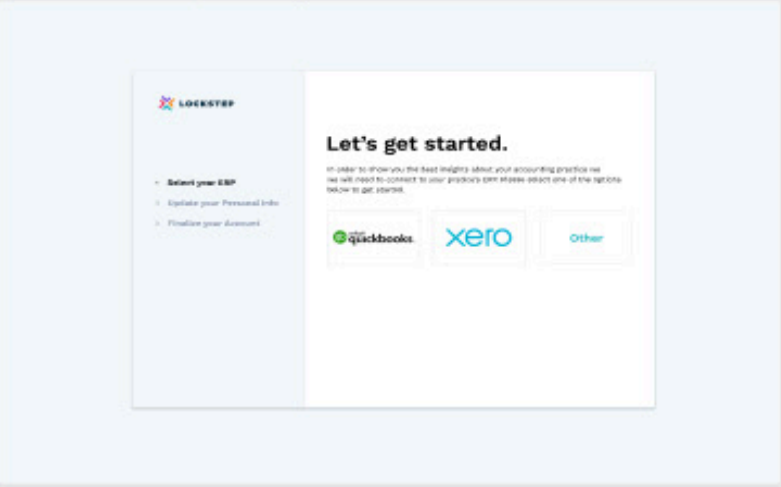


We used these user flow sessions as postups to establish affinity maps and understand business requirements.

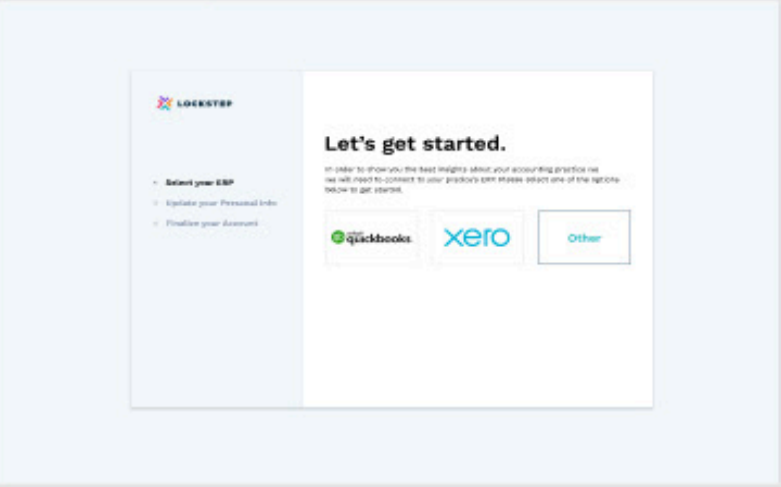
*The results of these sessions would be turned into prototypes to show how a user would flow through the product and when requirements would be gathered in the onboarding experience.*



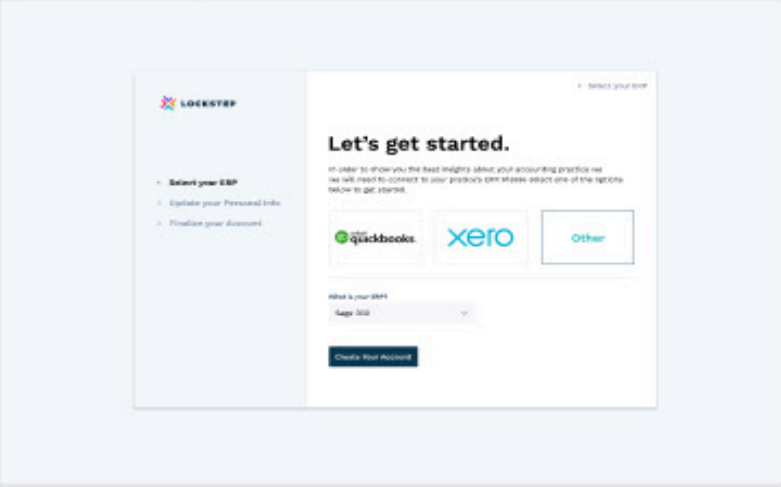
Account Creation / Landing



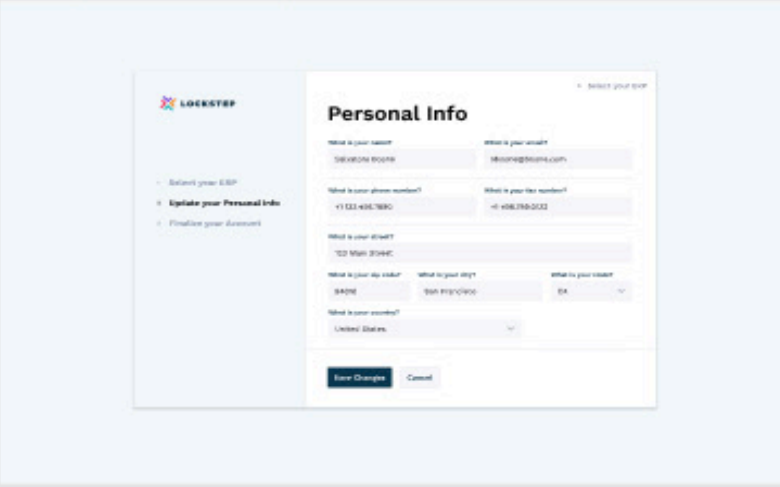
Account Creation / Other Hover



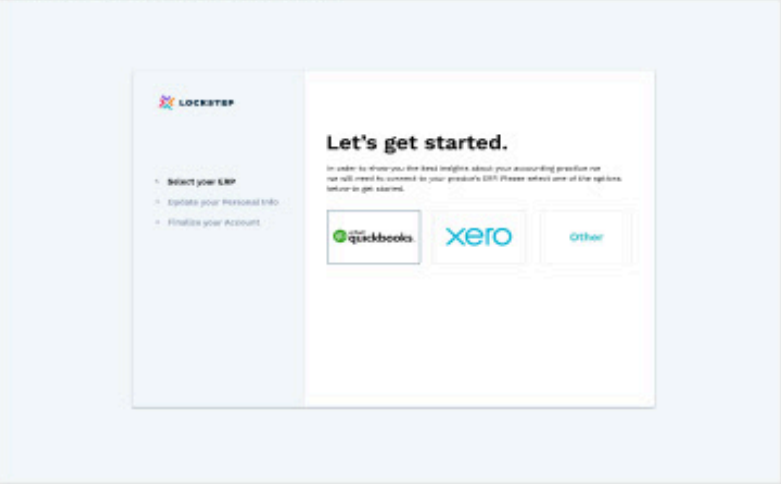
Account Creation / Other Selected



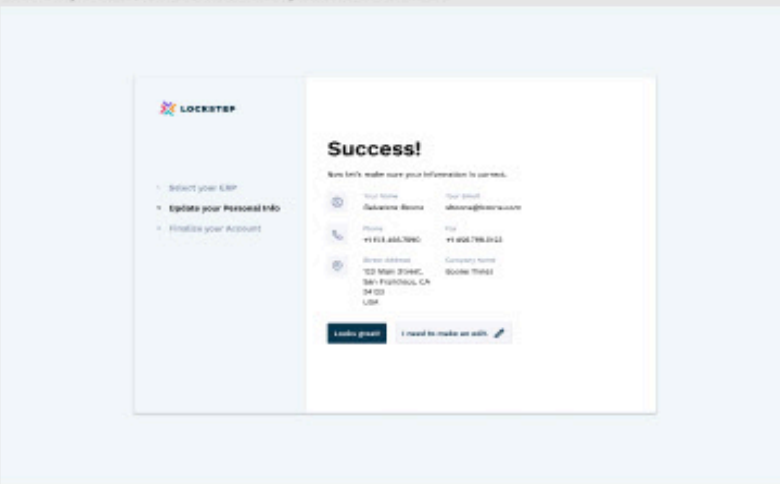
Other / Account Creation / Personal Info



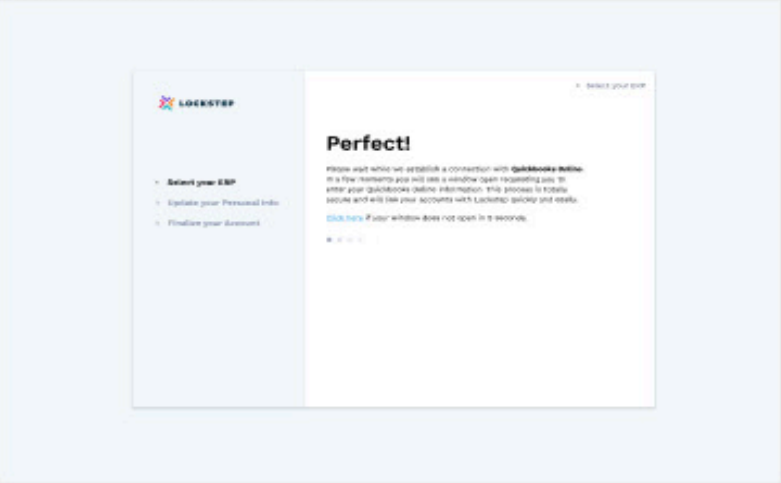
Account Creation / QBO Hover



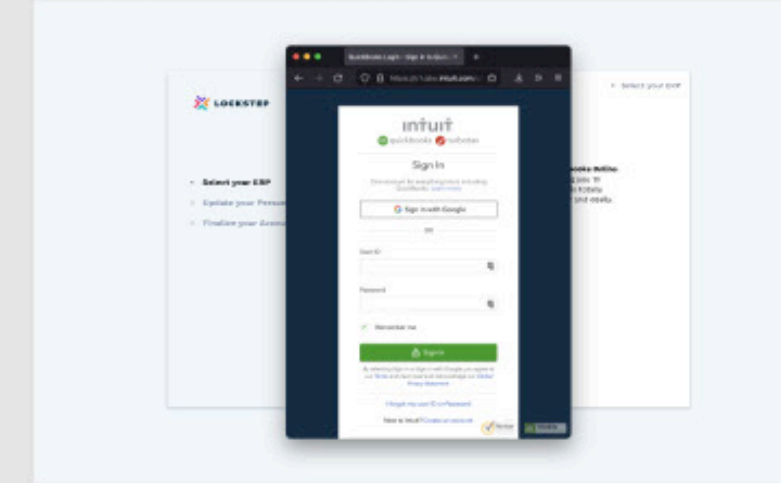
Other / Account Creation / Personal Info



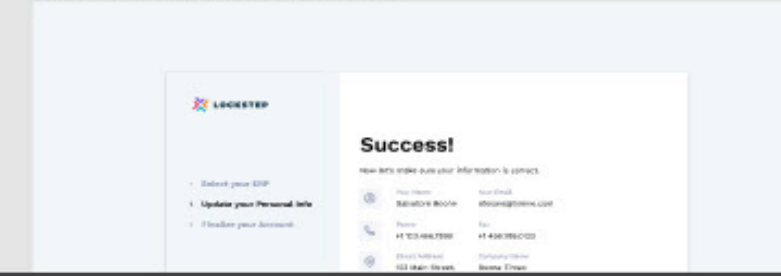
Account Creation / QBO Selected



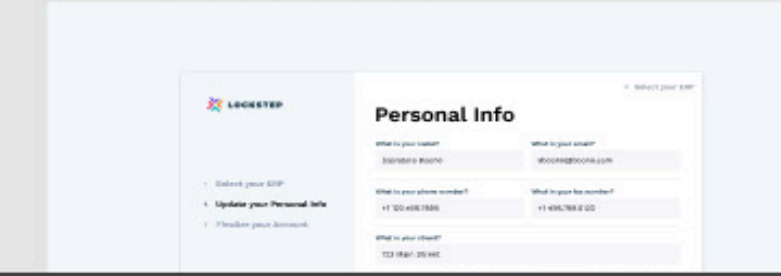
Account Creation / QBO Pop Out



Account Creation / Personal Info

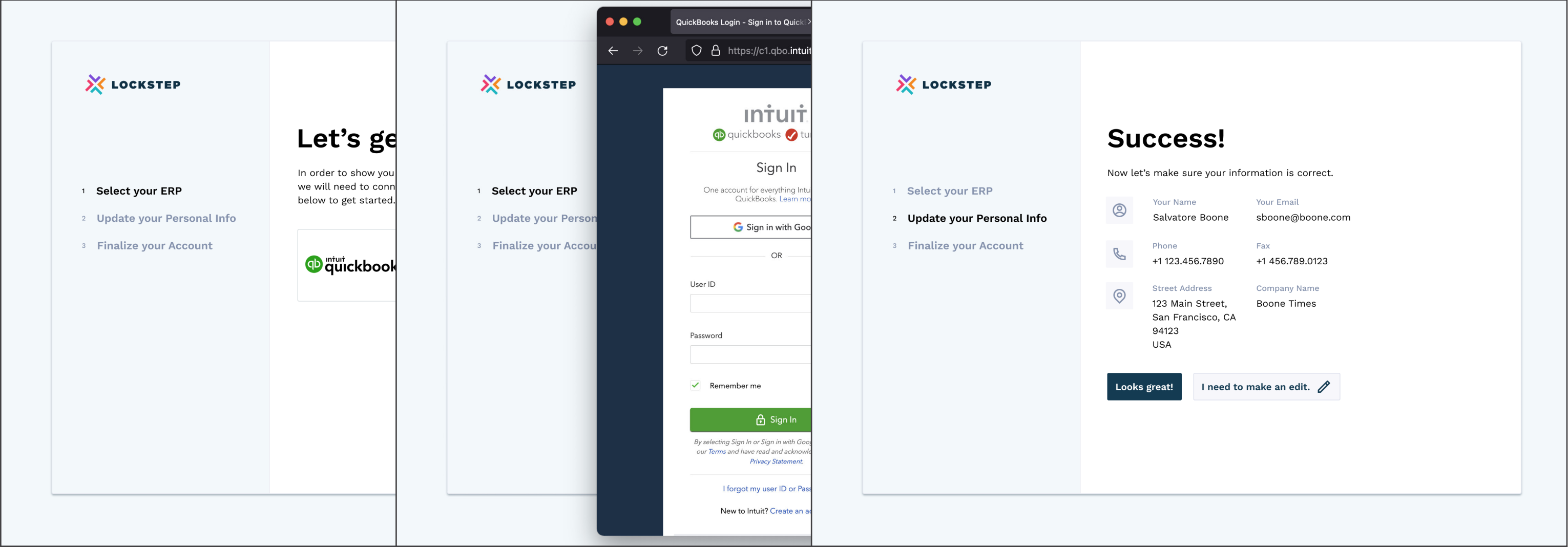


Account Creation / Personal Info / Edit



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).*





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

1 - Initial Account Creation

Users can select an "SSO" service or create a new account.

Initial Account Option



Initial Account Option



Initial Account Option / v2



2 - Creating A Lockstep Account

The user opted to create a fresh Lockstep Account

Account Creation Requirements



Account Creation Requirements



3 - Account Already Exists

The user has already created a Lockstep account

Existing Account



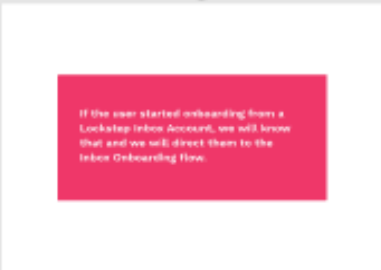
Login With Email



4 - Inbox Onboarding

The user has verified and is coming from an Inbox origin

Inbox Onboarding



Inbox Onboarding / Landing



Inbox Onboarding / ERP Addition



Inbox Onboarding / ERP Additio...



Inbox Onboarding / Email Additi...



Inbox Onboarding / Email Additi...



Inbox Onboarding / Data Confir...



Inbox Onboarding / D



5 - Generic Onboarding

The user has verified and has multiple choices of where to go

Generic Onboarding



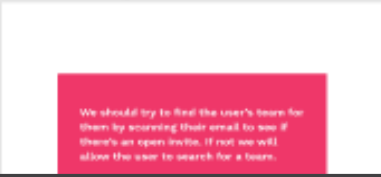
Generic Onboarding / Finish ...



6 - Joining A Team

The user has selected they are joining a team

User Prompted Join Team



User Prompted Join Team / T...



User Prompted Join Team / T...

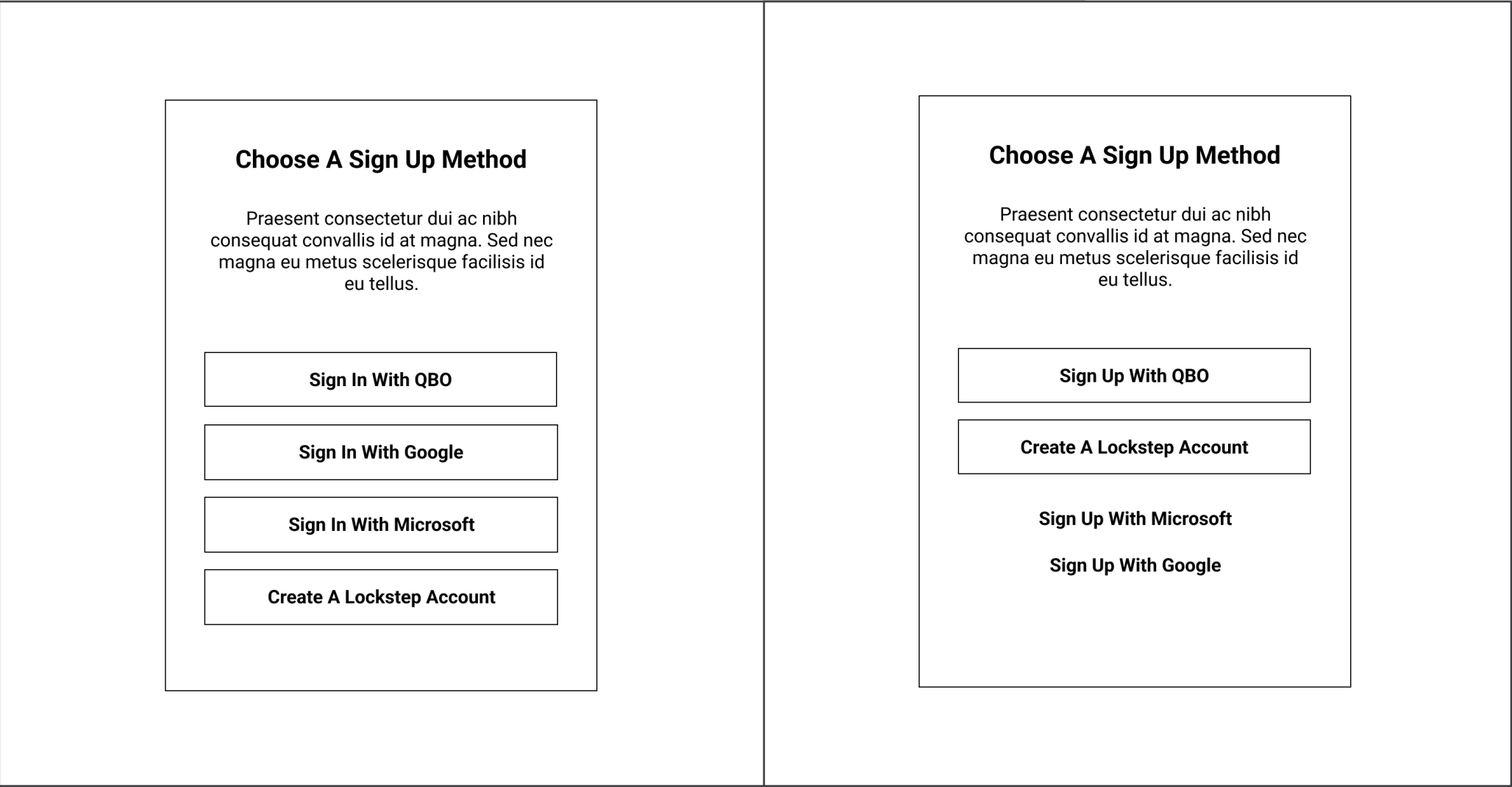


User Prompted Join Team / T...



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.”




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.*


## Option 1

### Choose A Sign Up Method

Praesent consectetur dui ac nibh consequat convallis id at magna. Sed nec magna eu metus scelerisque facilisis id eu tellus.

 Sign In With QBO

 Sign In With Google




 Sign In With Microsoft

Create A Lockstep Account

## Option 2

### Choose A Sign Up Method

Praesent consectetur dui ac nibh consequat convallis id at magna. Sed nec magna eu metus scelerisque facilisis id eu tellus.



OR

Create A Lockstep Account



Option 3

### Choose A Sign Up Method

Praesent consectetur dui ac nibh consequat convallis id at magna. Sed nec magna eu metus scelerisque facilisis id eu tellus.

OR

Create A Lockstep Account

Option 4

### Choose A Sign Up Method

Praesent consectetur dui ac nibh consequat convallis id at magna. Sed nec magna eu metus scelerisque facilisis id eu tellus.

Sign In With QBO

Sign In With Google

Sign In With Microsoft

Create A Lockstep Account





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



## Choose A Sign Up Method

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

 Sign In With QBO

 Sign In With Google

 Sign In With Microsoft

Create A Lockstep Account





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?  
[Click here](#) to resend the code.



# Welcome to Lockstep Inbox

We here at Lockstep think you're going to love the automated activity management solutions and enhanced 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.](#)

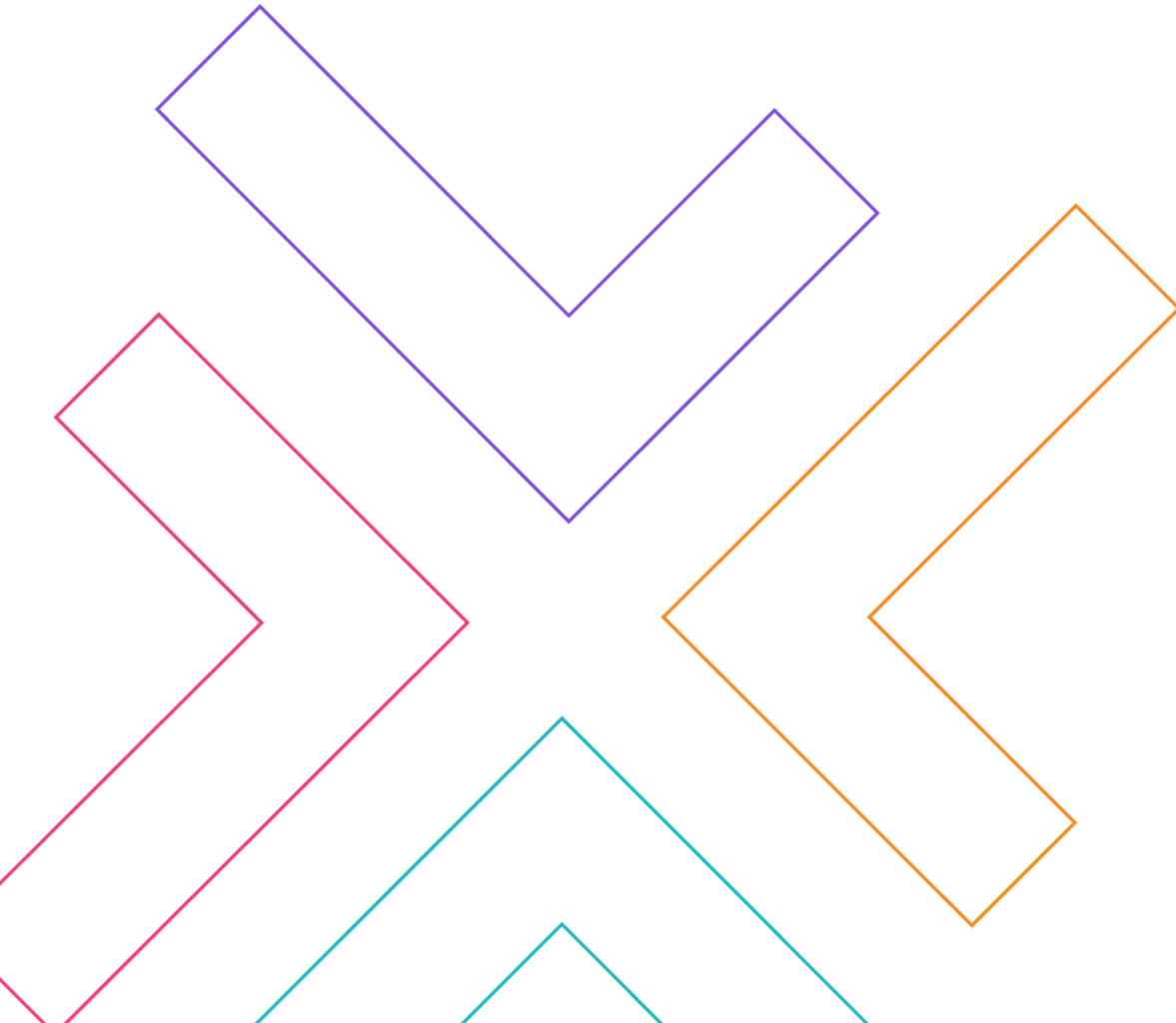
To get you started, we're going to need to connect to your ERP and to your Email System.

Select your ERP



[I don't see my ERP Listed](#)

Continue



# Welcome to Lockstep Inbox

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

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[Skip and take me to the demo.](#)

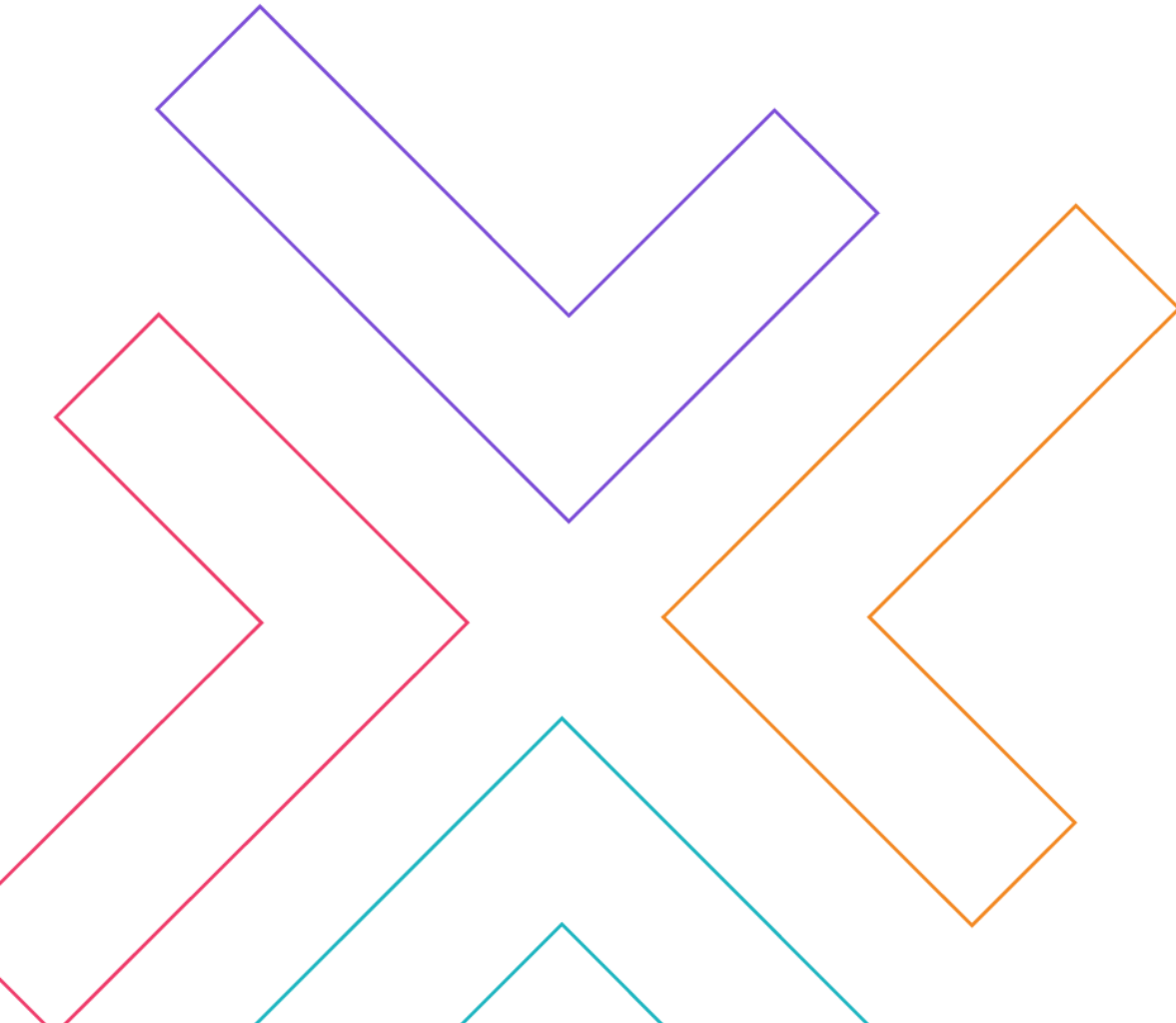
Great job!  
Now you need to connect your email.

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.*