Checkout Redesign

April 5th, 2022

Overview

- Update layout and design with best practices in the current pattern library.
- Implement new payment methods
- Implement single address field verification
- Improve credit card form submission area
- Improve order review & confirmation
- Implement account creation after guest checkout

Success Metrics

Reduce checkout abandonment

Outline of Project

- Create a consistent design according to the current pattern library
- Evaluate overall flow and page layout against best practices
- Form Field Specific
 - Auto-populate address fields
 - Clearly indicate erroneous fields
 - Implement adaptive error messaging
 - Redesign "inline labeling" in form fields
 - Explain why required info is needed ie. phone number
- Add new Payment Methods (listed in order of importance)
 - Financing
 - AFF (May launch with this payment option only)
 - ZIP
 - Express Checkout
 - Apple Pay
 - Amazon Pay
 - Google Pay
- Credit Card Specific
 - Luhn validate the credit card number sooner in the process
 - Autoformat with spaces, the credit card number

Reminders -

*Consider how the order summary in checkout will affect the cart.

*Consider one line credit card line

*Address Book - consider worst-case scenarios and what impact that might have to "my account"

Must Address Both -

Guest Checkout

Sign in when on the page

Facebook Checkout
Account Checkout

Resources:

- Baymard UX Performance Summary
- Baymard Cart & Checkout Benchmarks

Timeline

Research -

Use Flows -

Wireframes -

UI Design -

<u>User Testing/Rapid Prototyping -</u>

<u>Ticket Submission and Reviews</u> -

<u>Usability Testing</u> - friends & family testing

Sprint -

Live - Before Mid-October (3-Weeks before) October

Checkout Redesign

Presented by Jason Niemoth

Problem Statement

According to Baymard Institute, the Select Blinds checkout experience is "mediocre" and sits in the bottom 60% of the e-commerce sites in Baymard's benchmark. As a business, we want to provide a checkout experience that is not overwhelming and easy to understand, reducing the risk of checkout abandonments.

Research Goals

- Identify industry best practices via Baymard's Audit
- Conduct a competitive analysis ranking identified best practices
- Provide research examples for discussion
- Provide recommendations for Select Blinds checkout

KPIs - Success Metrics to Achieve

- Reduce checkout abandonment
 - What's the level of abandonment between the logged in vs. guest checkout experience?
 - What are the biggest pain point(s) that users have complained about with the current checkout?

Research Challenges/Blockers

- New site colors and fonts might not be 100% deployed, preventing new design system to be used
- Technical specs of new payment options that will be incorporated are TBD unsure if these specs could potentially effect design
- Other than Select Blinds, been unable to review an entire checkout flow of competitors (including confirmation pages & follow up emails)

Baymard Best Practice Recommendations

- #719 How to Introduce, Position, and Style Error Messages
 Always highlight incorrect fields in red and place the error message in close proximity.
 With a single error, autoscroll users to the erroneous field; with multiple errors, show them a universal message outlining there are multiple errors at the top of the page.
- #582 <u>Luhn Validate the Credit Card Number Field</u>
 The credit card number field must live Luhn validate the user's input before the entire card dataset is submitted (front-end validation).
- #722 <u>Use 'Adaptive Error Messages' that Match the User's Specific Subissue</u>
 Use 'Adaptive Error Messages' that specify the exact subissue that caused the user's specific input to fail validation, and outline what a user must do to correct it.
- #683 <u>Avoid Inline Labels</u>
 Avoid inline labels (though they may be acceptable for forms of 1 or 2 fields), and be cautious when implementing floating labels (in particular, ensure the error message state performs well).
- #594 <u>Autoformat Spaces in the 'Credit Card Number' Field</u>
 Autoformat the credit card number as users type with an input mask. If not using an input mask allow users to enter spaces.
- #638 Save Account Creation for the Confirmation Step
 Save account creation for the confirmation step and make it easy to create an account by only having users fill out a 'Password' field. Inform users choosing the guest checkout flow (e.g., at the account-selection step) that they'll have an option to create an account after placing the order.
- #731 Explain Why Seemingly Unnecessary Personal Data is Required
 Don't require users to provide personal information that isn't strictly necessary to complete the checkout; in particular, phone, date of birth, or gender. If necessary, always explain why the information is required and how it's used.
- #596 <u>Display the Full Order Details on the Confirmation Step</u>
 Show the order number, the ordered items, estimated arrival date, shipping address, total order cost, and payment method(s) directly on the order confirmation step.

Additional Recommendations Reviewed

- Pitfalls of Checkout:
 - #655 <u>Traditional Multi-step checkout</u>
 - Most Popular: Currently being used on 63% of top 50 US e-commerce sites use this checkout flow
 - Can deliver both a horrible OR excellent experience. CONSISTENTLY outperforms better or worse than the other experiences.

- Most important to checkout UX performance is WHAT users are asked to do and HOW they are asked during the flow - not the flow type
- Some inherent usability issues particularly regarding the checkout flow being unclear or difficult to control, it sometimes being unclear when the order is placed, and that the actual editing flow is often highly cumbersome
- Key that the process steps correspond to the actual flow the user goes through
- Ensure that the process steps for previously completed steps act as links to move backwards in the flow
- o #648 Accordion Checkout
 - 32% of top 100 US e-commerce sites use this checkout flow
 - Has **NOT** found that accordion-style checkouts **CONSISTENTLY** perform better than either traditional multi-page checkouts or one-step checkouts. They can perform well, but the accordion layout in and of itself doesn't matter that much.
 - Does have some inherent usability issues that actively have to be dealt with, such as communicating to users the expanding sections concept, back-button behavior that misaligns with users' expectations, and occasionally deprives users of the ongoing review
 - Accordion Steps Should Collapse Into Summaries
 - Key that accordion-style checkouts collapse the past checkout steps into summaries to achieve one of the key benefits of having an accordion-style in the first place
 - Ensure that the browser back button takes users back to the previous viewed step – regardless if it's technically the same or a separate page
- #565 One-Step Checkout (**Select Blinds**)
 - Has NOT found that one-step checkouts CONSISTENTLY perform better than either traditional multi-step checkout or accordion style checkouts. What's most important to checkout UX performance is what users are asked to do during the flow and how they are asked.
 - Most frequently observed usability issues of one-step checkout design:
 - overwhelming appearance
 - non-linear sub-flows
 - difficulties in reviewing the order
 - One of the main benefits of one-step checkouts is that they show users everything they have to complete up-front. Users are therefore given a clear promise of "you are done once you complete what you see here"
 - Use Advanced Simplification Form Features to Avoid an Overwhelming Appearance
 - Avoid Sub-Flows Entirely
 - Inherent challenge with one-step checkouts is that when wanting to review the order data, users will have to review what they've typed

directly in the active form fields

For sites with order types where users will frequently want to thoroughly review their order, it's perfectly viable to consider having a separate review step after the main step where all checkout information is typed. It will of course semantically no longer be a true one-step checkout, but it will align far better with users' actual needs.

- #668 Minimize the Number of Form Fields Users See by Default
 Remove any unnecessary fields from the checkout flow. Use smart form field features
 and designs to collapse, preselect, or otherwise minimize optional fields. If 10–15 form
 fields are still viewable use multiple steps and add whitespace to provide a grouped
 view.
- #613 <u>Always Implement Process Steps as Links</u>

Other Best Practices to Continue:

#606 - Use a 'Enclosed Checkout' Design

Use an "Enclosed Checkout" by removing the main site navigation and other non-checkout navigational elements from all steps after the cart step and until the order review step (incl.).

- The number of elements shown to users should be reduced to a minimum to allow them to focus on completing the checkout process.
- CVR increases 3-10% solely from removing the main site-navigation and similar non-checkout related elements
- The only navigational links and information provided relate to the order or the checkout so users aren't in danger of exiting the process without intending to

Typical checkout header elements may include:

- A simplified header that still includes the site's header or primary branding to ensure
 users that they are still on the site, and provides an escape route for users who get
 stuck. Escape routes for exiting the checkout flow are provided via the clicking the site
 logo (which should always lead to the homepage), and via the process steps that
 should generally include the cart as the first step
- Help information and in particular customer support contact information should be provided along with any intelligent chat windows if available
- A cart icon in the header (#607) (if an actual order summary sidebar isn't used), will remind users of the order total and number of items in their cart.
- The user's signed-in status will allow the user to verify that they are signed in, and which account they are signed into

NNG - Nielsen Norman Group

https://www.nngroup.com/articles/mobile-checkout-ux/

- Make guest checkout prominent and easy to find.
 Even people who have an account forget passwords; in many cases, it will be easier for them to check out as guests than to recover their password on their mobile device.
- Make the order summary easy to find in mobile layouts.
 To avoid unpleasant surprises later in the flow, show the order summary prominently at the top of the checkout pages.
- Use the user's current location to determine sales tax, delivery costs, and any pickup options available.
- For each field, present the correct keyboard
- Offer mobile-friendly payment options, but don't overwhelm users with too many options.
 - Recognizable third-party checkout options such as Paypal or Apple Pay can be helpful, but too many options can cause choice overload.

Estimated Taxes

NNG - How to Display Taxes, Fees, and Shipping Charges on Ecommerce Sites

Unexpected service fees and special-delivery costs should be disclosed early in the shopping process to avoid losing customers.

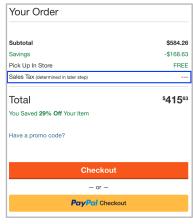
- Although shoppers are aware that some additional costs can be disclosed only at the end of the checkout, any nonstandard charge should be communicated early
- Wait Until Checkout to Communicate Taxes and Typical Shipping Rates
- US customers are accustomed to shopping online or in stores, so their ecommerce mental model includes the addition of taxes and standard shipping charges at checkout.
- They also know that taxes and shipping rates may depend on the delivery address
- Be Upfront About Nonstandard Fees

Baymard - #732: Provide Full Order Cost, or An Estimate, In the Cart

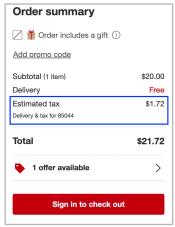
Display the full order cost in the cart, including shipping, taxes, and fees, or at least a cost estimate that also specifies the foundation for the estimate.

- Before users proceed to the checkout, they have an idea of what lies ahead of them
- Providing this information late in the process can not only lead to abandonments, but can also result in users developing a negative perception of a site, as some will feel "tricked" by the initial, incomplete order total that was provided.
- The cart total will ideally also include a tax estimate.
- Displaying estimated taxes, as well as additional fees (e.g., handling fees for oversized items), presents challenges that can be addressed similarly to shipping costs:
 - a. Use IP geotargeting or signed in user information to establish the most likely location of the user, and base the tax estimate on that
 - b. Display a range of lowest-possible taxes and handling fees

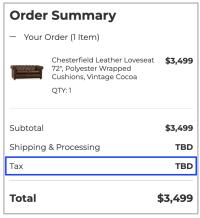
• **Providing users with insights into the conditions for the estimate** — for example, "Estimated Tax: \$2.30 (California)" — will improve transparency and decrease disappointment if the actual taxes turn out to be higher later on.



Home Depot - Shopping Cart



Target - Shopping Cart



Pottery Barn - Checkout Prior to filling out Address)

Competitive Analysis

	Checkout Type	# of Payment Methods: Financing Options	# of Payment Methods: Express Checkout	Offers Social Login?	Single Address Verificatio n	Avoids Inline Form Labels	Save Cart Items / Place Saved in	CC Entry w/ Space Auto- Format	CC Luhn Validatio n After Entry
Direct Com	petitors								
Select Blinds	One-step	1 Affirm	1 PayPal	Faceboo k	×	×	Save entire	×	×
Blinds.co m	Multi- step	0	2 Both PayPal	×	×	•	Save entire	~	•
Blindster	Multi- step] Bread	0	×	~	•	×	✓	×
The Shade Store	Multi- step	1 Affirm	1 PayPal	×	×	×	Save entire	~	×
Home Decor Leaders (Indirect Competitors)									

	Checkout Type	# of Payment Methods: Financing Options	# of Payment Methods: Express Checkout	Offers Social Login?	Single Address Verificatio n	Avoids Inline Form Labels	Save Cart Items / Place Saved in	CC Entry w/ Space Auto- Format	CC Luhn Validatio n After Entry
Crate & Barrel	Multi- step	0	3 PayPal, Venmo* & Apple Pay* *mobile only	✓ Google	•	~	Items Only	•	Checks only when you click
Pottery Barn	Accordio n	1 Affirm	1 PayPal	×	×	~	Items Only	×	×
Interior Define	Multi- step	1 Affirm	0	×	×	•	×	•	×
WayFair	Multi- step	4 Wayfair CC, Afterpay, Klarna, Wayfair	1 PayPal	V Google	V	Yes on accoun t, no on CC	Items Only	V	V

3 of 8

3 of 8 6 of 8 3 of 8

6 of 8

2 of 8

7

Analysis Takeaways

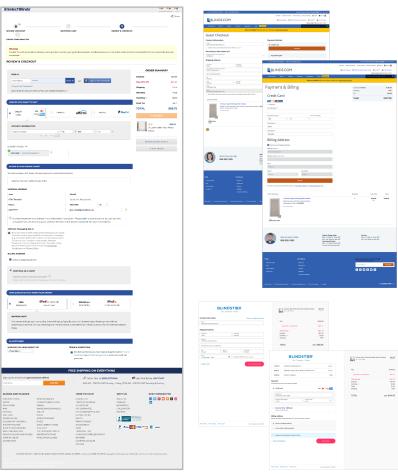
- 75% (6 of 8) of competitors use multi-step checkout. All direct competitors use multistep checkout. 1 uses accordion checkout - Pottery Barn. 1 uses one-page checkout -Select Blinds.
- 2 of the 3 direct competitors offer similar payment options as Select Blinds
- All used Credit Card as the default payment method.
- Only 1 competitor (indirect) offers express payments other than PayPal Venmo and Apple for mobile devices only.
- Only 3 of 8 used an alternate social login offering during account creation. No direct competitor uses this option.
 - What's the percentage of users using Facebook to login vs. Registering on site?
- Baymard benchmarks/best practices are partially followed for competitors. Only Wayfair has followed all benchmarks reviewed.
- Blinds.com offers an additional option of "Order Offline" pay by mail or phone.
- The Shade Store's mobile experience bounces to a very difficult desktop view while offering a link to view the mobile site buried on the bottom (which was easily lost). Once in the Cart/Checkout, the view remained as a desktop view on Desktop.

Checkout by the Numbers (1/2021 - 5/22/22)

Device Category	Pageviews	Time on Page	Exit Rate
Desktop	64%	4:49	9.71%
Mobile	33%	6:27	13.73%
Tablet	3%	5:04	9.90%

Research Screenshots

One-Step vs. Multi-Step vs. Accordion



POTTERYBARN

Full Name

Full Name

Address

Cotton Building (cyclones)

Address

Looking Building (cyclones)

Full Name

Distance

City State St

Accordion

One-Step (Select Blinds)

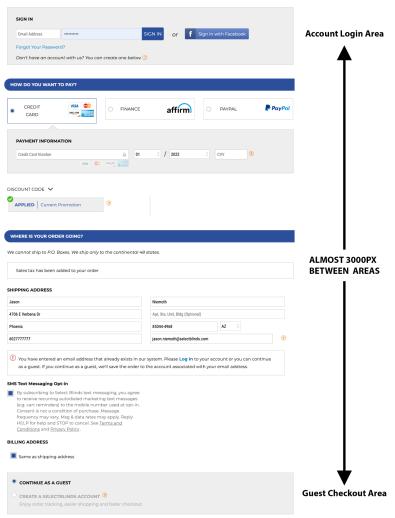
Multi-Step

The Shade Store Shopping Experience (Mobile)

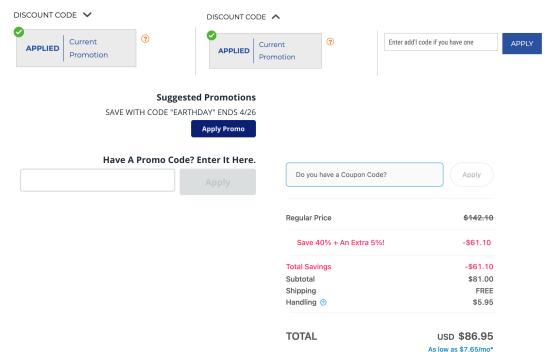


Sign In / Guest Checkout

The Guest Checkout option is located differently from the other sign in options



Promotions / Discount Codes



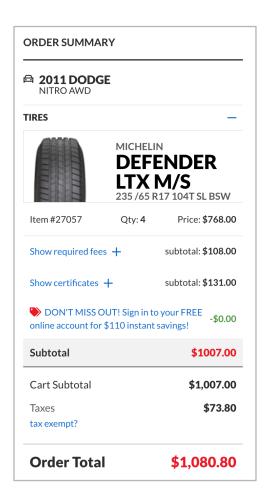
Promotions Observations:

- Promotion applied is not listed.
- Can the user remove promotions once they are added to the cart?
- Are there other promos that can be applied to the cart?
- The other promos field is hidden accidentally clicked on discount code words and other field appeared

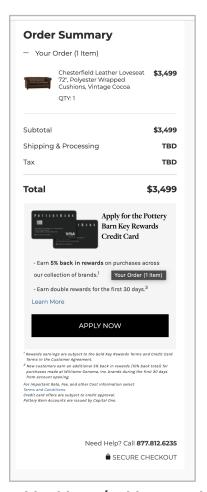
Process Steps

Process steps are not interactive. Ensure that the process steps for previously completed steps act as links to move backwards in the flow

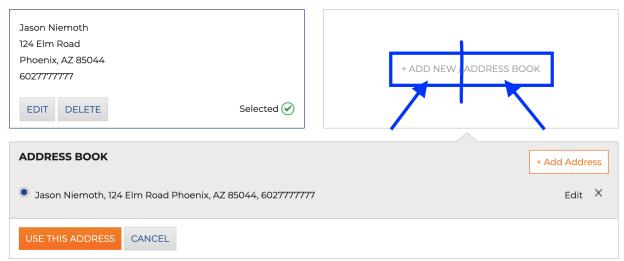




Product Summary

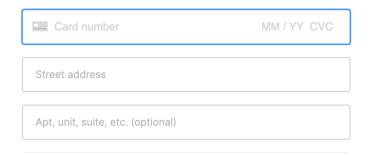


Add Address / Address Book

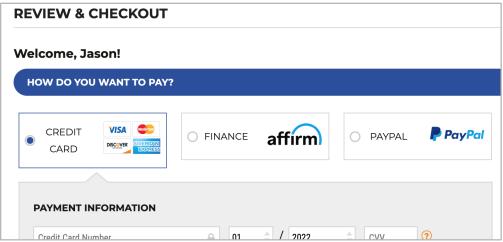


Online Credit Card Input Field

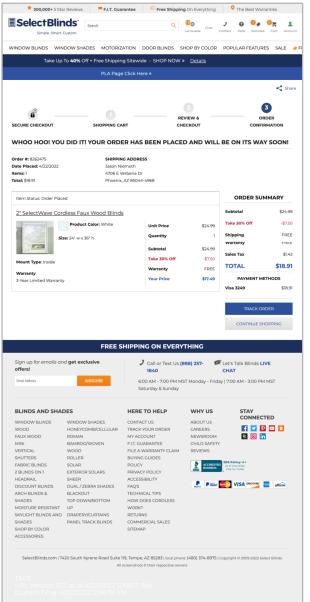
Enter your payment details



Multiple Payment Methods - Baymard Best Practice



Confirmation Page Comparison



SelectBlinds* Search Chat J @ 24 Og Language Chat Contact Help Samples Cart Account WINDOW BLINDS WINDOW SHADES MOTORIZATION DOOR BLINDS SHOP BY COLOR POPULAR FEATURES SALE # Take Up To 40% Off + Free Shipping Sitewide - SHOP NOW » Details 3 8 REVIEW & CHECKOUT SECURE CHECKOUT SHOPPING CART WHOO HOO! YOU DID IT! YOUR ORDER HAS BEEN PLACED AND WILL BE ON ITS WAY SOON! Corded lifts with accessible cords pose a strangulation hazard to young children and pets. Cordless products are the safest choice and recommended for homes where kids and pets are present. FREE SHIPPING ON EVERYTHING 6:00 AM - 7:00 PM MST Monday - Friday | 7:00 AM - 3:00 PM MST Saturday & Sunday HERE TO HELP WHY US BLINDS AND SHADES STAY CONNECTED CONTACT US
TRACK YOUR ORDER
MY ACCOUNT
F.I.T. GUARANTEE
FILE A WARRANTY CLAIM f V P B MINI VERTICAL SHUTTERS FABRIC BLINDS 2 BLINDS ON 1 ROLLER BUYING GUIDES POLICY BBB ACCREDITED BSS Rating: A+
As of 4/21/2022
Click for Profile HEADRAIL DISCOUNT BLINDS ACCESSIBILITY FAQ'S SHEER DUAL/ZEBRA SHADES VISA DISCOVER affirm **Guest Checkout**

Logged In

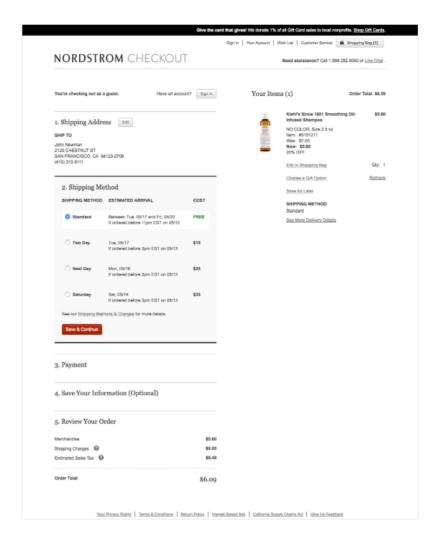
Confirmation Page Observation:

Why are there different checkout confirmation pages for guests vs. logged in users?

Recommendations

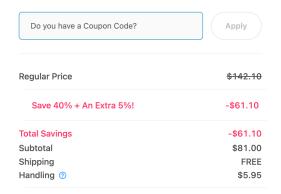
Layout: With the majority of users checking out on Desktop vs. Mobile, It's
recommended to provide a layout that is easy to navigate instead of the possibility of
overwhelming a user using a one-page checkout design.

Switch to an accordion checkout within a single page that will progress to the next step through a clickable action. After the user advances to the next "step" the user will see a summary of the previous step - where the user can make an edit or use the back arrow in the web browser to go back a step.

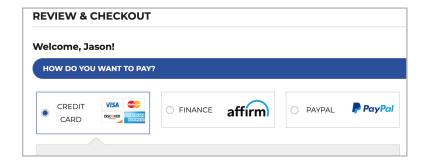


- 2. **Order of Information:** Reorder content so that the Customer is filling out in the following order:
 - Login or Guest Checkout
 - Shipping / Billing Address
 - Shipping Methods

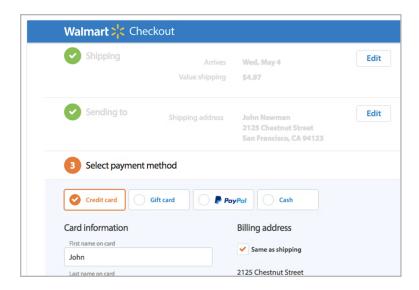
- o Payment & Terms
- 3. **Discounts/Promotions:** Discounts to be presented as a line item in the Order Summary (as it currently exists today) with an area to add additional discounts (if applicable) as it is presented below. Remove the Discount Code "Applied" button and section from checkout flow.



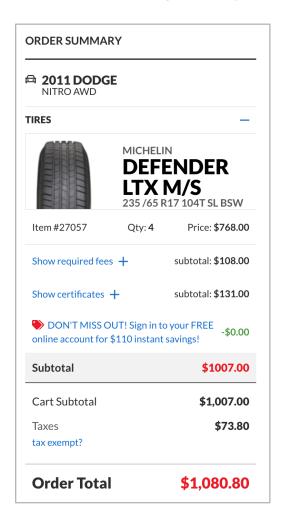
4. **Payment Methods:** Offer payment in a tabbed horizontal layout. Currently used - Best Practice (#590 - <u>Use a Tabbed Payment Method Interface with a Default Selection</u>)



5. **Process Steps:** Ensure that the process steps for previously completed areas are accessible and that finished steps show completion (i.e.: green checkmark).

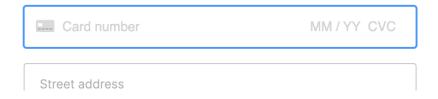


6. **Order Summary:** Offer a detailed Order Summary with product listed above order info. Consider including the ability to edit order details within the summary.

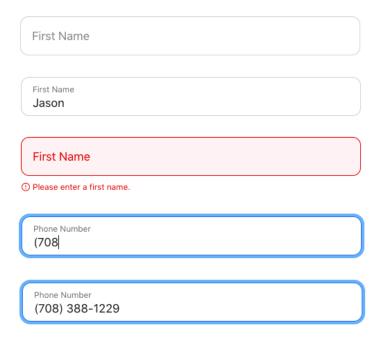


7. **Online Credit Card Input Field:** Properly space out numbers according to number pattern. Allow for expiration date & CVC on the same line as the credit card number. Luhn validate after completion

Enter your payment details



8. **Form Fields:** Shift inline label as text is entered and add error messages, while also identifying areas where errors occur.





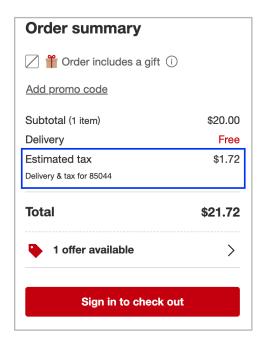
9. Address Book: Update button labeling to be less confusing & more intuitive.

10. Confirmation Pages:

- Update Guest checkout confirmation page to match logged in confirmation page.
- Remove the "Track Order" button from the page.
- On the guest confirmation page, offer the customer one last opportunity to create an account - offering account creation benefits.

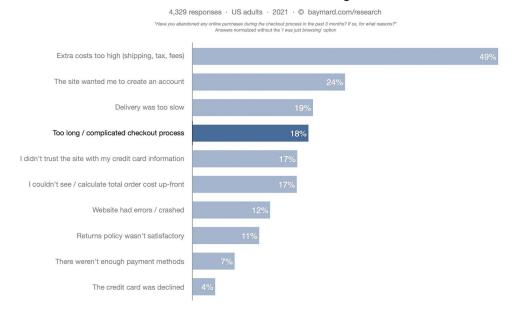


- https://baymard.com/blog/delayed-account-creation
- https://baymard.com/blog/order-confirmation-page
- 11. **Estimated Taxes:** To reduce customer frustrations with hidden fees during checkout, best practice is to include estimated taxes prior to checkout in the shopping cart.
 - Use IP geotargeting or signed in user information to establish the most likely location of the user, and base the tax estimate on that.



Appendix

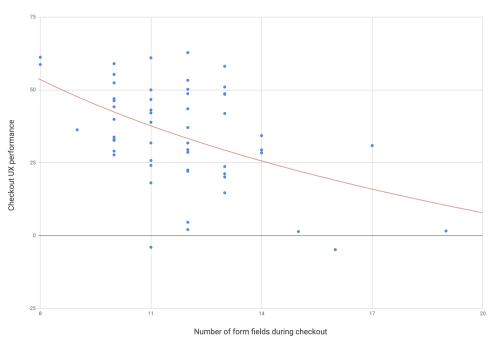
Reasons for Abandonments During Checkout



Checkout UX performance vs number of form fields

60 Top E-Commerce Sites in 2021

© baymard.com/research



Usability Findings – Checkout Redesign

Participant Breakdown

- Gender: 8 Female / 6 Male
- Age Range: 37 53
- Ethnicity: 4 White / 3 Hispanic / 4 Black / 2 Asian / 1 Middle Eastern

Scenarios Tested

- **Guest Checkout** (5 Tested)
 - o 2 PayPal
 - o 3 Credit Card
- Logged In Checkout (5 Tested)
 - o 2 PayPal
 - o 3 Credit Card
- Express Checkout (4 tested)
 - o 4 PayPal

Post-Usability Questionnaire Answers

- 1. Overall, how did you find navigating through the checkout experience?
 - o 11 Very Easy
 - 3 Easy
- 2. Were the input prompts displayed clearly?
 - o 8 Strongly Agree
 - o 6 Agree
- 3. What did you like the most about the checkout experience and why?
 - Very easy to navigate
 - Options were very clear
 - The progress indicator knows, upfront, the steps need to be done
 - o Loved the Confirmation page Huge order # & reconfirmation of info
 - Font size is comfortable
 - Liked to see the "Need Help" contact info
 - Liked the Express options at the top of checkout pg & then only had to confirm content
 - o The auto-populate address area
 - o Able to clearly see what was ordered
 - Variety of payment options other than CC (doesn't want to give another site CC info)
 - Follows a Standard Checkout Flow
- 4. What did you like the least and why?

- Confusion with messaging on the PDP modal -"Don't Lose Your Account!" / Sign In /
 Secure Checkout.
- Contacting info for SB not large enough
- Lack of logos early to show all payments offered
- Edit Address once verified, an extra step is needed to edit the address should be able to just click in the address boxes and start editing away
- Not being able to add delivery details or a company / apartment name
- o No color prompts everything was in black & white
- 5. What, if anything, caused you frustration?
 - Having 2 buttons to proceed with checkout what was the difference?
 - Was unsure about what payment methods accepted early in checkout
 - Edit Address once verified, an extra step is needed to edit the address should be able to just click in the address boxes and start editing away
 - Not being able to add delivery details or a company / apartment name
 - o Didn't like the handling fee separate from the shipping

Recommendations for Launch

- 1. Call out selected options and discount codes in color
- 2. Make sure contact info is easily visible Size, color, etc
- 3. Remove the "lock down" / click to edit address after validation of address

Recommendations for A/B Testing / Post-Launch

- 1. Consider Express Payments to top of checkout
- 2. Display of payment options (credit card, finance) on the Shopping cart and/or PDP modal