Designing Out of Box and First Time User Experiences to Delight Your Customers

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Designing Out of Box Experience (OOBE) and First Time User Experiences (FTUE) to Delight Your Customers

After this session, you should be able to:

- Explain why OOBE matters for all products
- Identify your OOBE stakeholders
- Describe factors contributing to success or failure of OOBEs
- List OOBE best practices
- Plan to mitigate OOBE failures
- Discuss ways to measure OOBE success

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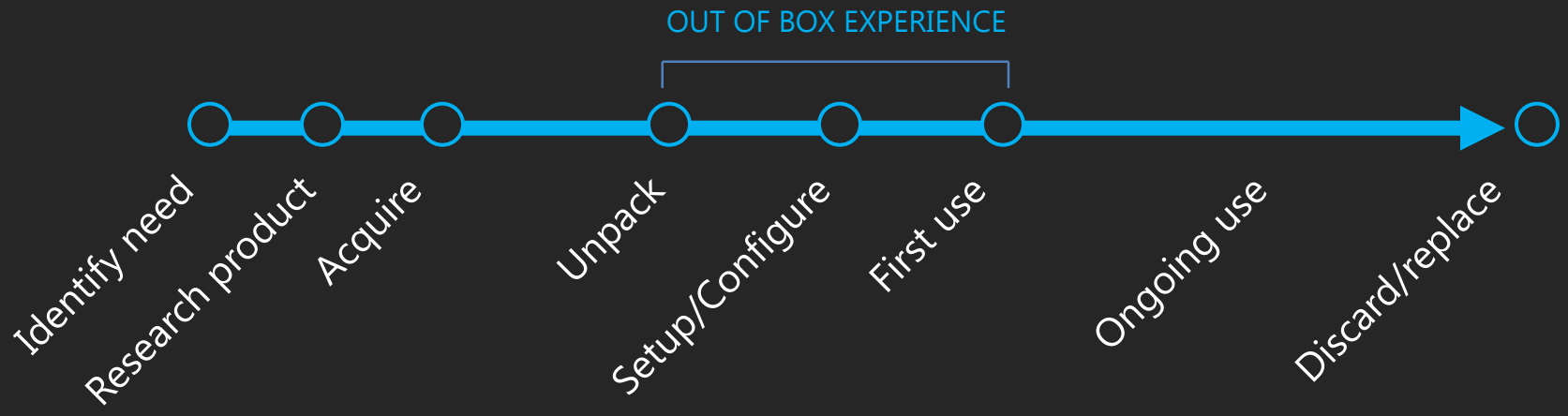
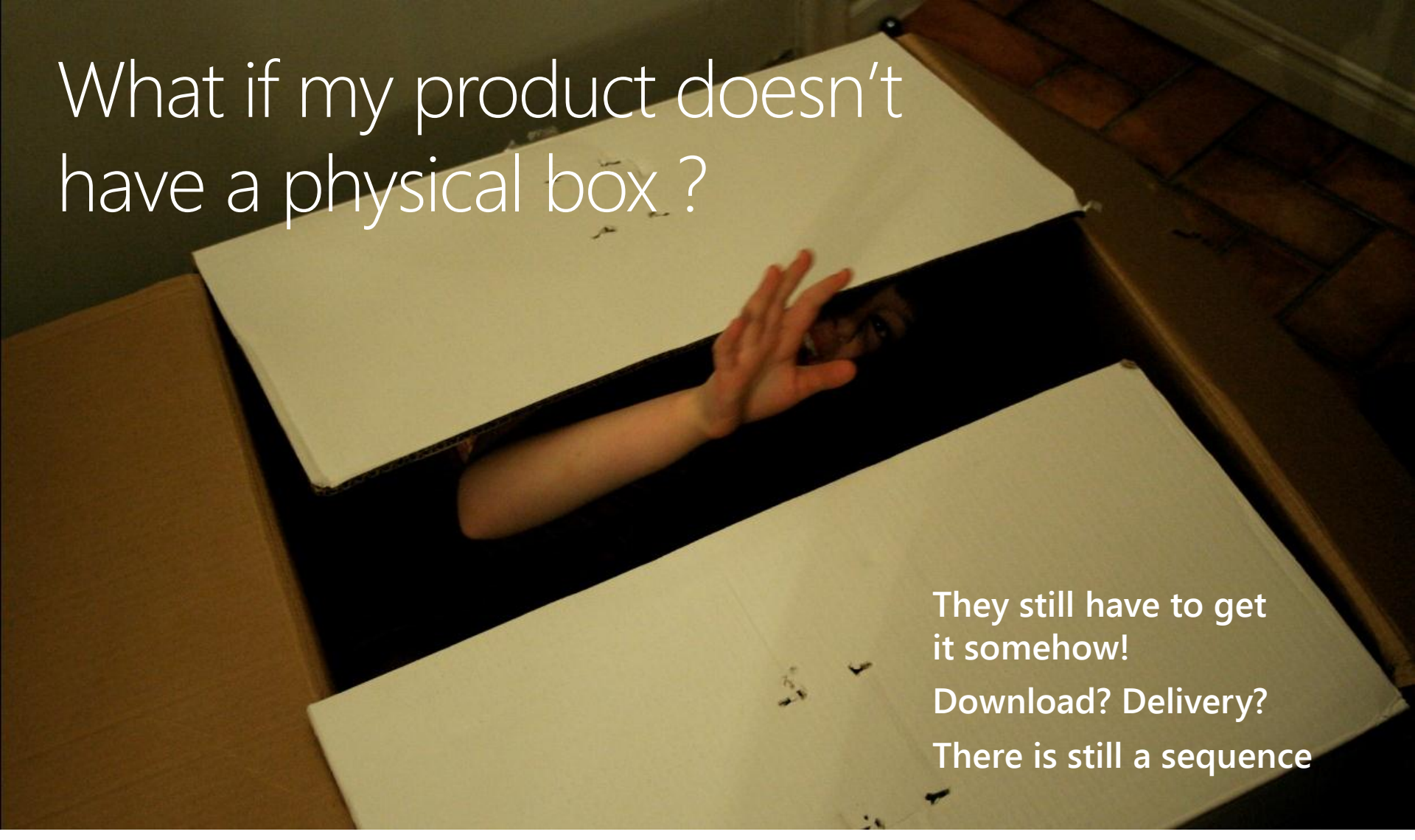
Systems Engineering
Systems Administration
Microsoft Solutions Framework

OOBE and the Product Lifecycle



Slide by Susan Burgess, Microsoft Hardware User Assistance

What if my product doesn't have a physical box ?



They still have to get it somehow!

Download? Delivery?

There is still a sequence

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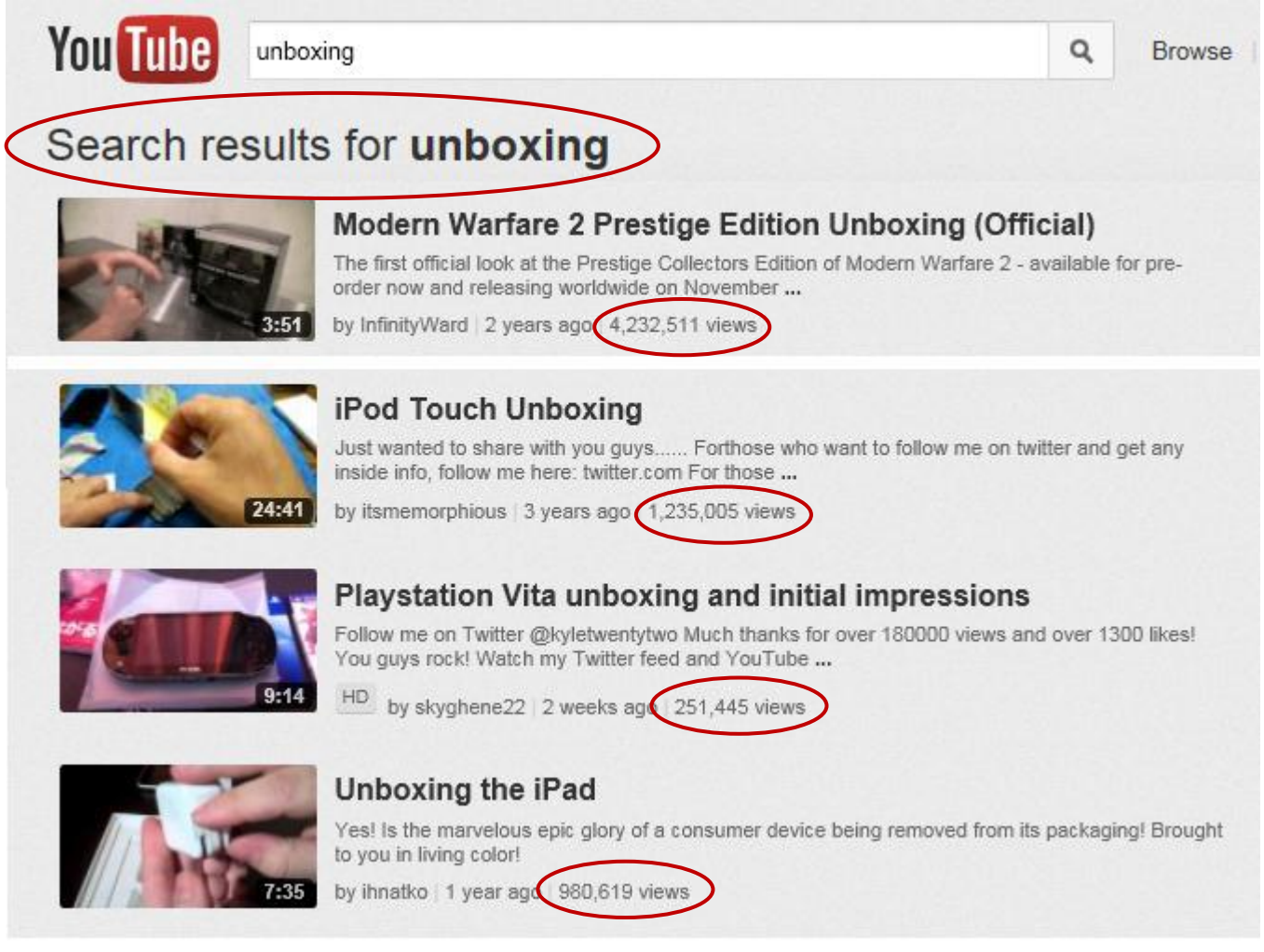
Why should I care about OOBE?



- Differentiate your product
- Reinforce your brand
- Reduce support calls

Who are my OOBE stakeholders?

- Structural packaging
- Marketing
- User assistance
- Industrial design
- Retailers
- Safety and compliance engineers
- Environmental engineers/recycling
- Software engineers (PM, Dev, Test)

Who is your audience?
What is your brand?
Where will they be buying this?
Where will they be setting this up?
What are the priorities in your OOBE?
What are the pitfalls to avoid?
What are my experience goals?

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The OOBE Stages

Keep track of the boxes

Do I have them all?

Which box comes first?

Do they look like they belong together?

Help them find the first opening

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Make it easy without using tools

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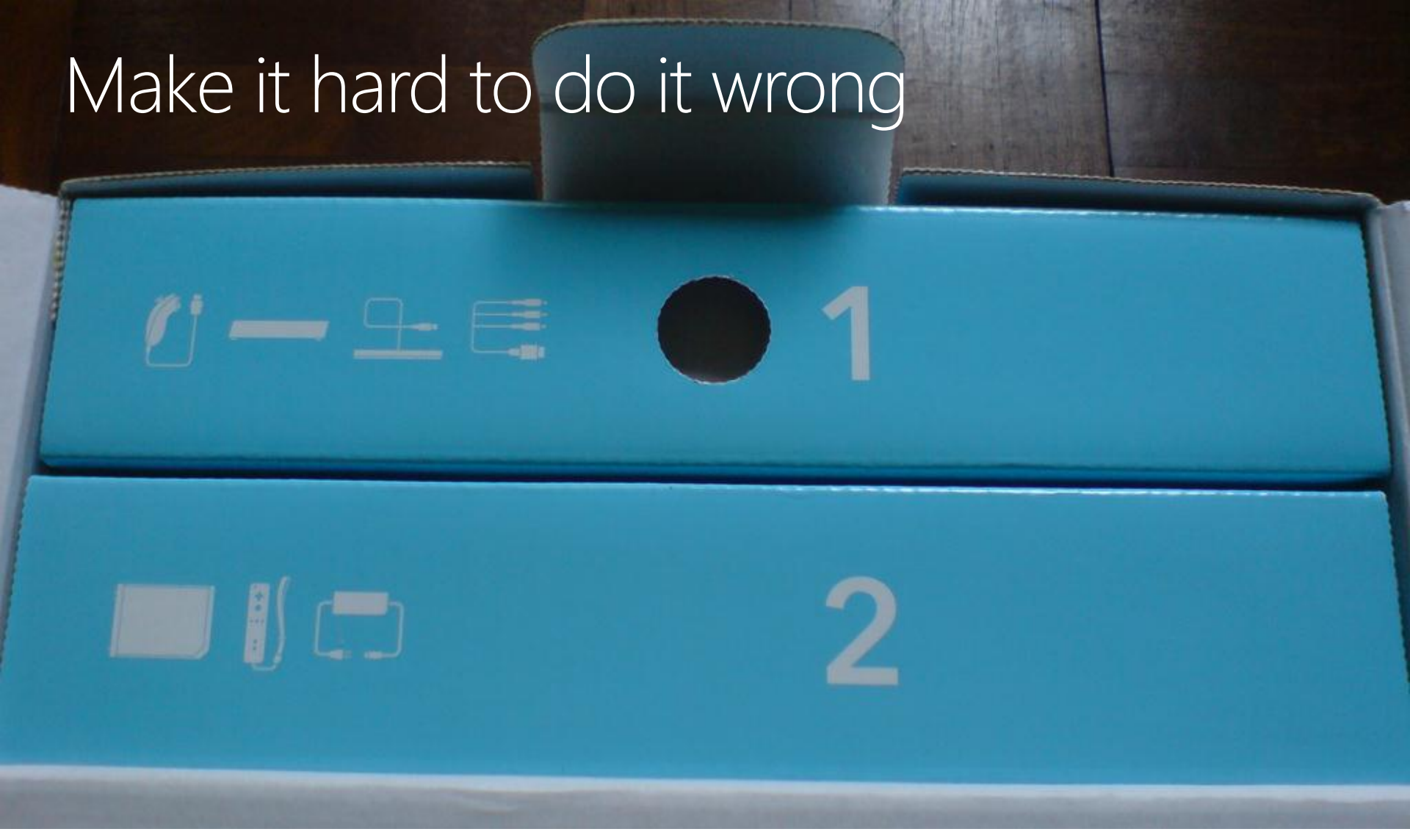
Don’t lead them astray

Make it hard to do it wrong



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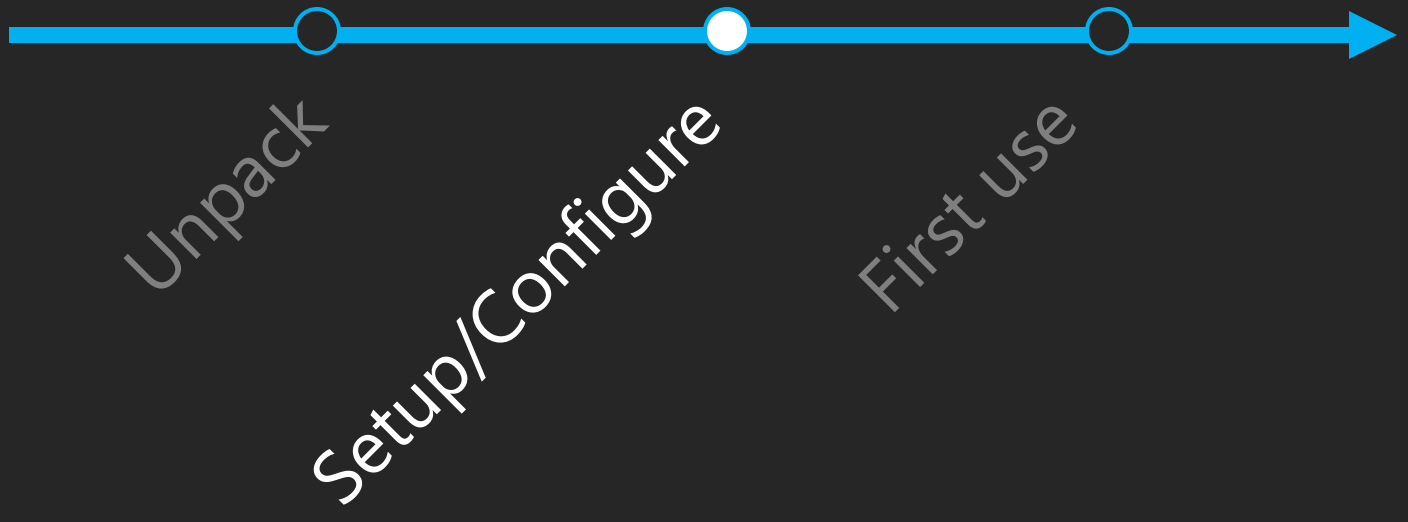
Integrate the experience

edans/flickr/ Commons Attribution 2.0

Minimize packaging waste

randomidea/flickr/ Commons Attribution 2.0

The OOBE Stages



Manage dependencies

Are any steps dependent on others?
How will they know?

Here Be Dragons

Added by Sarah Maddox [Atlassian Technical Writer], last edited by Jason Hammons [Administrator] on Nov 16, 2011 (view change) show comment

Beware, all ye who enter, for here be dragons! This is the starting point for the Atlassian Dragon Quest.

By the time you reach the end of this set of instructions, you will have an awesome Atlassian integrated development suite (details below). There's a g
will scorch the clothes off your back somewhere along the way, so we'll also send you a free, limited-edition Atlassian DragonSlayer T-shirt when you h

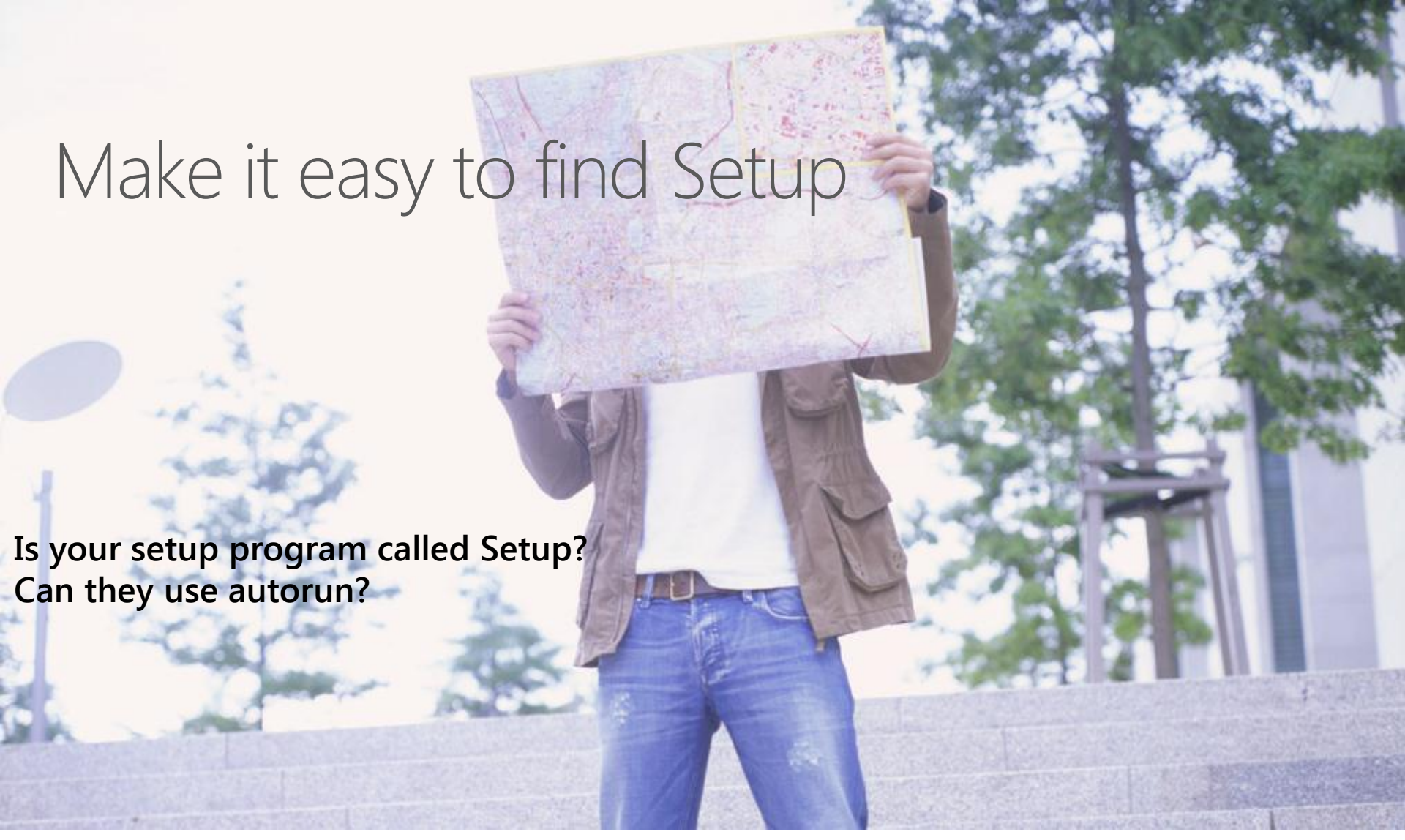
Got JIRA? If you are already using JIRA, please start at Dragon Slayers with JIRA Already Installed.

Getting help

If you run into problems at any stage of the integration procedure, please raise a support ticket for the product you're stuck on. Please don't try to battle on alone. Inst
answers from the community, or search the forum of past dragon slayers.

http://office.microsoft.com, http://confluence.atlassian.com/display/ATLAS/Here+Be+Dragons

Make it easy to find Setup



Is your setup program called Setup?
Can they use autorun?

Manage transitions between mediums

Moving from paper to screen will divert their attention

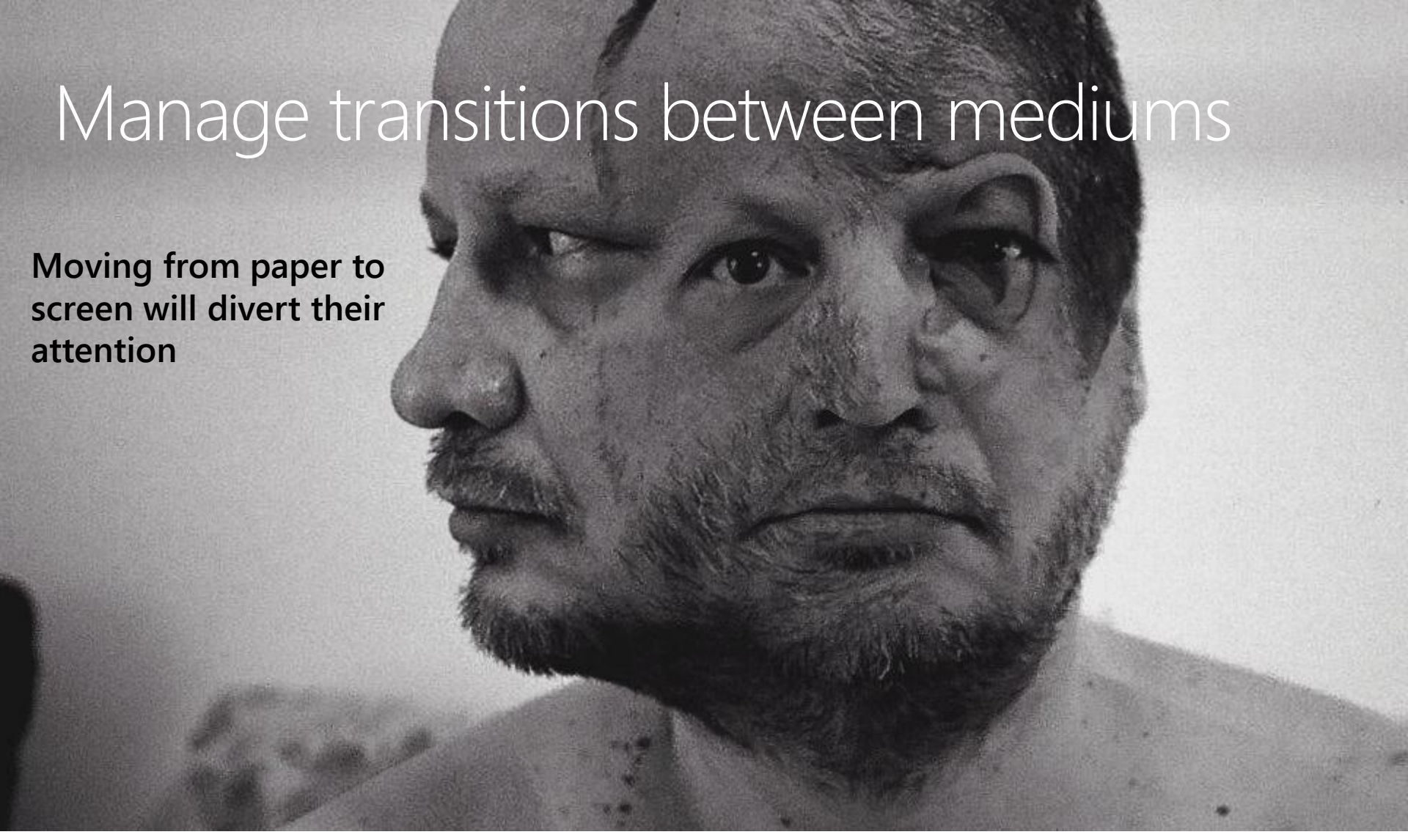


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Figure out what belongs in each phase:

Setup?

Configuration?

First use?

Required?
All users?

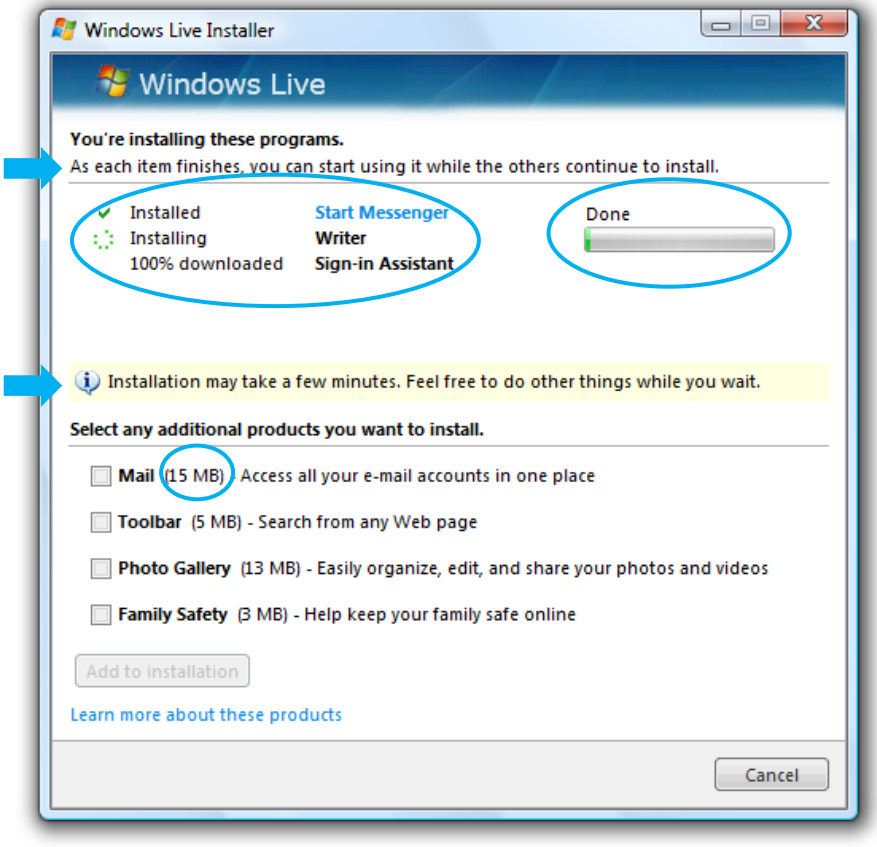
Some users?
Personalization?

Determine acceptable duration
Group sections requiring interaction

Manage the time for them

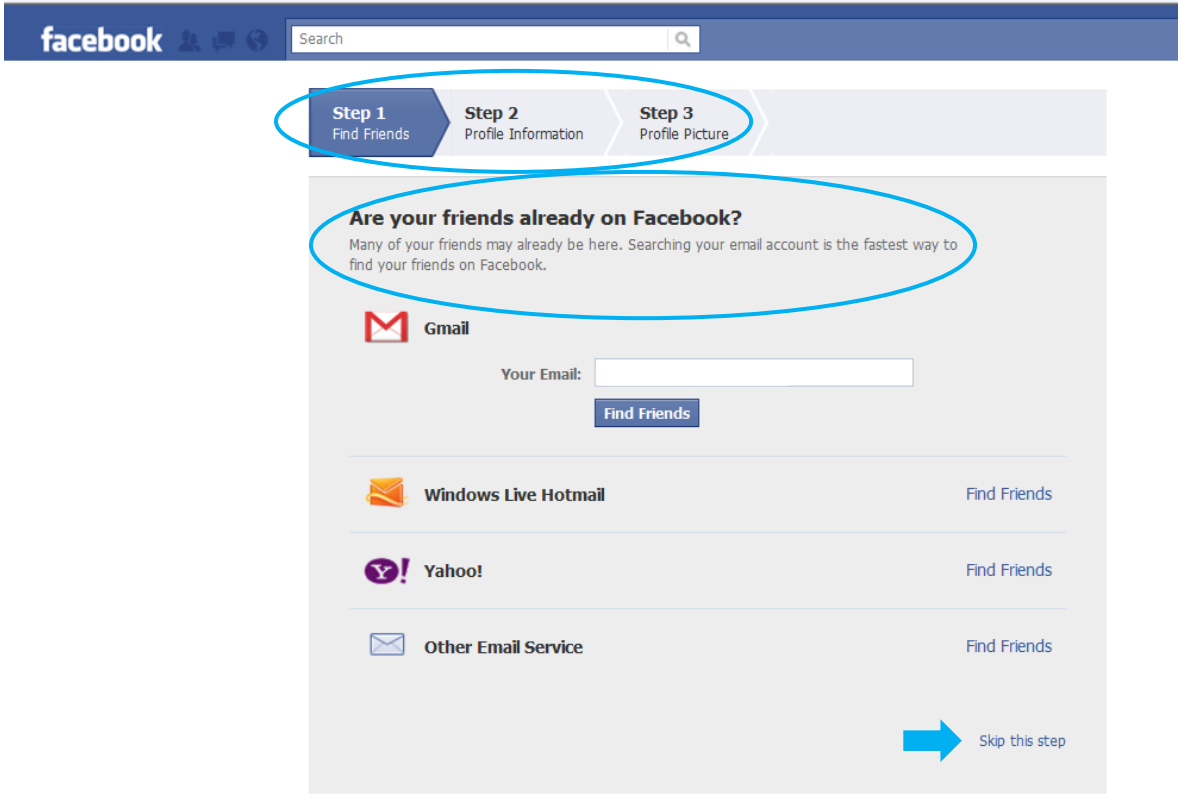
LifeSupercharger flickr Commons Attribution 2.0

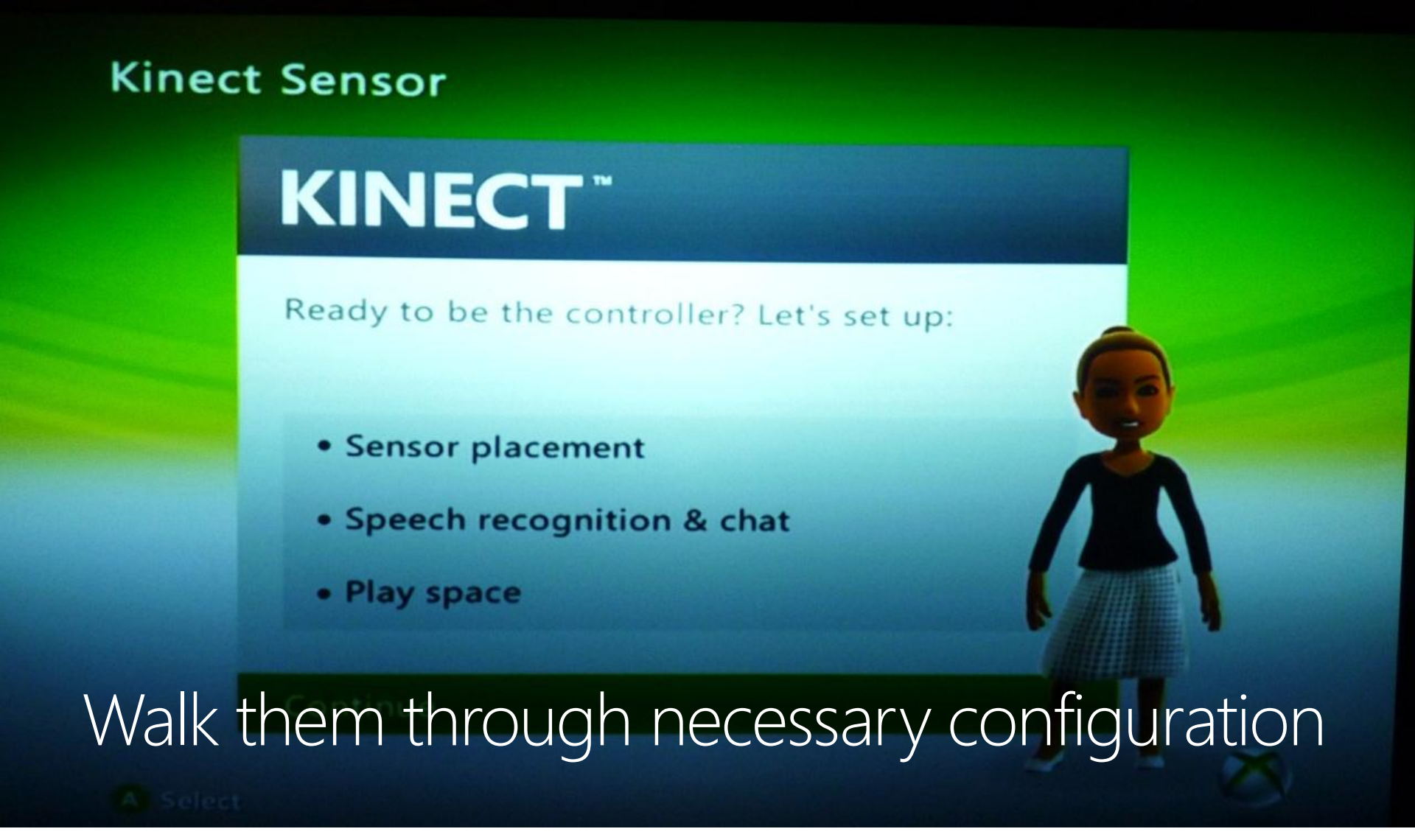
Let them feel in control



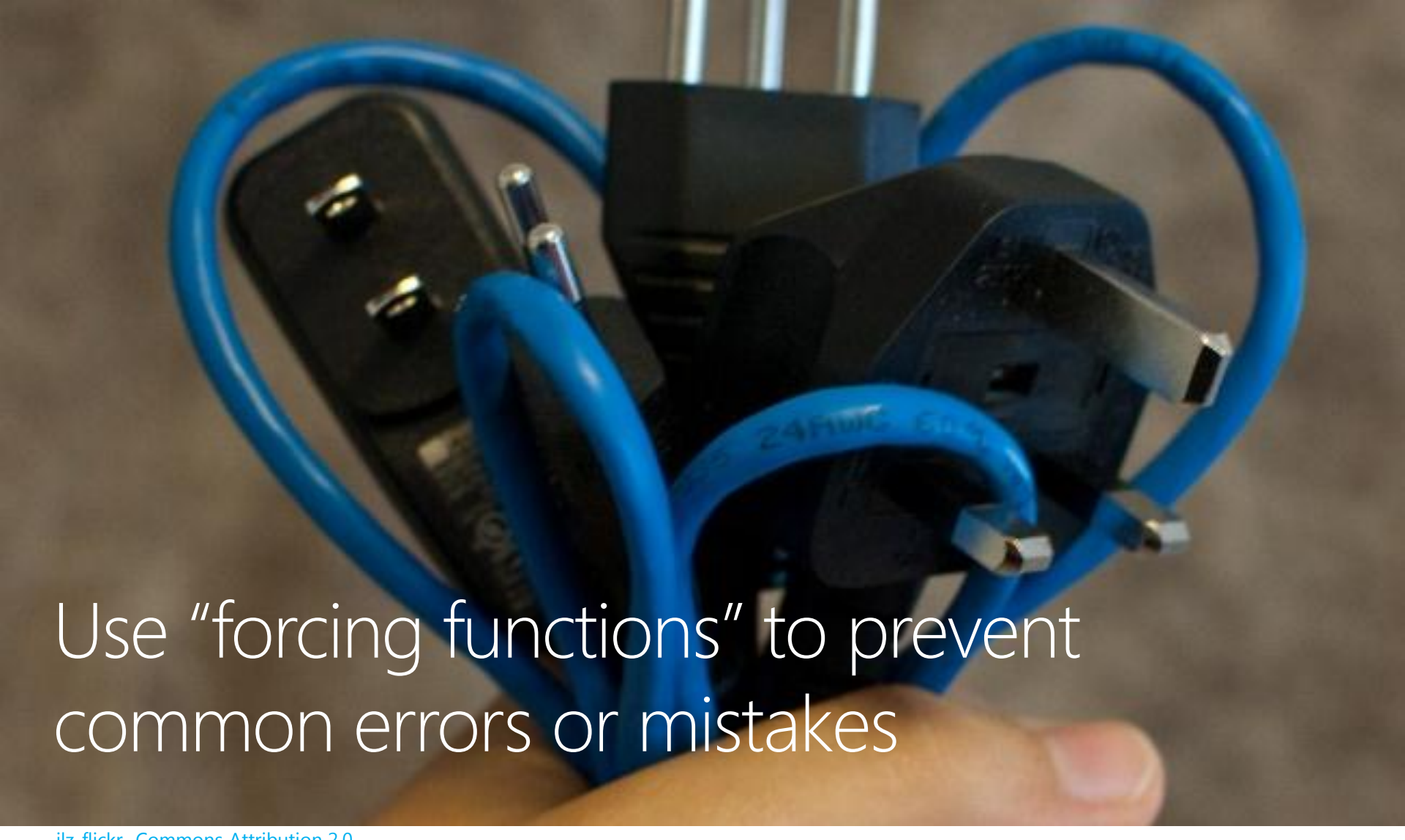
Let them know they are done

If it's not crucial, don't force them





Walk them through necessary configuration



Use “forcing functions” to prevent common errors or mistakes

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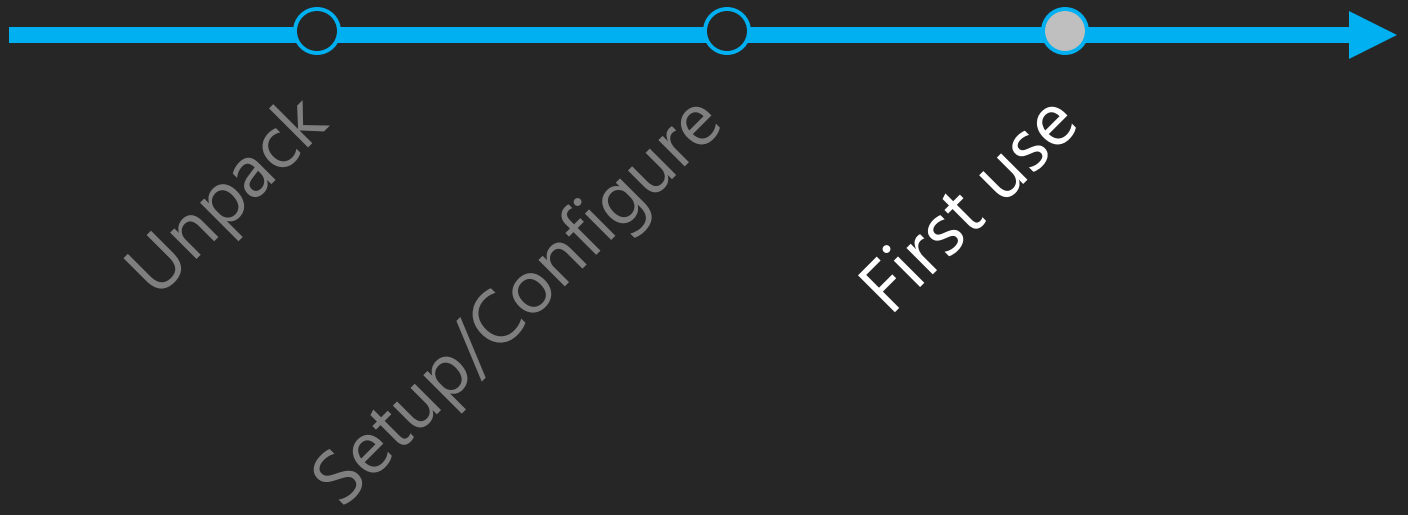
Select the most secure and private defaults

- **Users frequently accept defaults**
- **Don’t make them think about how to maintain security and privacy**
- **Give them the minimal but necessary information**

The OOBE Stages



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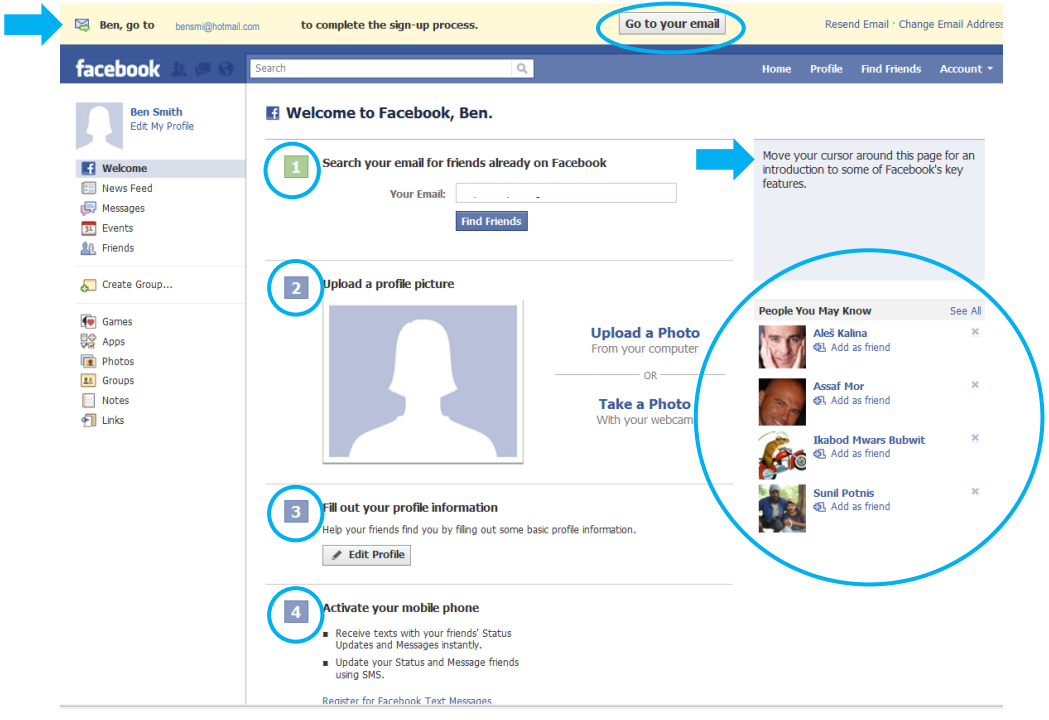
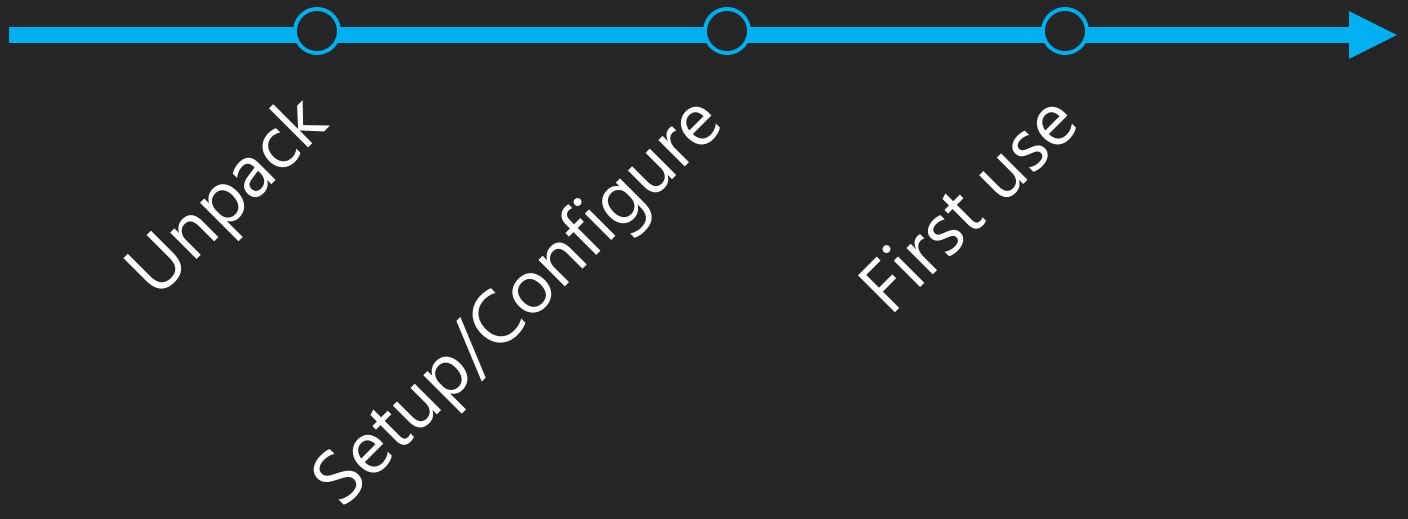
Don’t overwhelm them

Get them right into the game

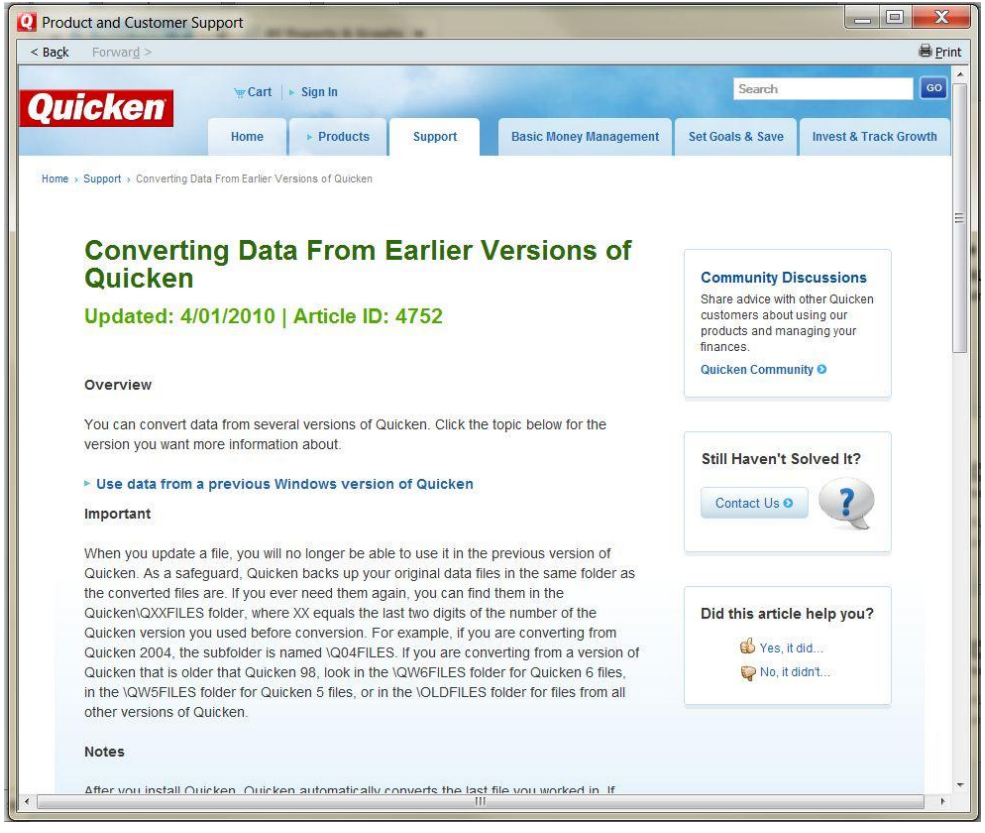
Provide just enough structure



The OOBE Stages



What if things don't work out?



- UA?
- Tech support?
- Newsgroups?
- Geek Squad?
- Genius on call?

How will you know you've succeeded?

- Hallway studies
- Usability studies
- In-home studies
- Focus groups

- Surveys
- Landscape review of similar products
- Support call analysis
- Community feedback

Example – Microsoft Touch Mouse OOBE

Slide by Jill Geurts, Microsoft Structural Packaging Engineer

Call to Action

- Don’t neglect your OOBE/FTUE
- Formulate clear design goals
- Design for your audience
- Make sure users find the things most important to their success
- Build it so users can’t mess up

Resources

- IBM Design Site about Initial Experience
  - http://www-01.ibm.com/software/ucd/initial.html
- *The Experience Economy: Work Is Theater & Every Business a Stage*
  - By B. Joseph Pine and James H. Gilmore
  - http://www.amazon.com/Experience-Economy-Theater-Every-Business/dp/0875848192/ref=sr_1_1?ie=UTF8&qid=1294817724&sr=8-1
- Opening the Windows Vista Box
  - http://windows.microsoft.com/en-US/windows-vista/Opening-the-Windows-Vista-box
- Windows User Experience Interaction Guidelines (including Setup and First Use)
  - http://msdn.microsoft.com/library/aa511258.aspx
- Gear Live Unboxing Site
  - www.unboxing.com
- If Microsoft Designed the iPod
  - http://www.youtube.com/watch?v=EUXnJraKM3k

PC Hardware OOBE Principles

Goal: Guide the customer through the process of unpacking, setting up, and using their product for the first time.

- Opening the box should be intuitive, unpacking should reveal information and components in a logical manner
- Make the easy decisions for customers - set smart defaults, notify when needed
- Judicious combination of text and images works best
- Build in safety nets for common failure points
- Provide clear feedback that the user has finished successfully
- Help the user transition from *installing* to *using (first run experience)*
- Don’t get in the user’s way
- Don’t take too long

Slide by Susan Burgess, Microsoft Hardware User Assistance

Best Unboxing Ever – Samsung Omnia i900

http://www.youtube.com/watch?v=QQIzX7EyIwU

Thank You!

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