

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:

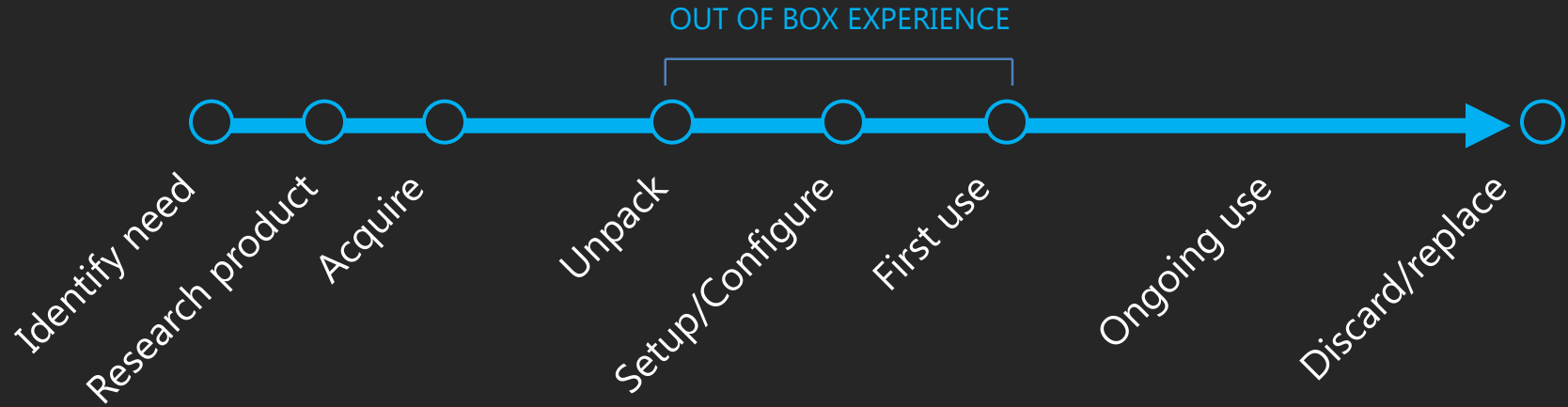
- Explain why OOBE matters for all products
- Identify your OOBE stakeholders
- Describe factors contributing to success or failure of OOBEs
- List OOBE best practices
- Plan to mitigate OOBE failures
- Discuss ways to measure OOBE success


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Systems Engineering
Systems Administration
Microsoft Solutions Framework

OOBE and the Product Lifecycle



A photograph of an open cardboard box lying flat on a wooden floor. A person's hand is raised from the inside of the box, and their face is visible through a hole cut into the side of the box. The lighting is dim, creating a mysterious atmosphere.

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

They still have to get it somehow!
Download? Delivery?
There is still a sequence

Why should I care about OOBEE?

YouTube

unboxing



Browse

Search results for unboxing



Modern Warfare 2 Prestige Edition Unboxing (Official)

The first official look at the Prestige Collectors Edition of Modern Warfare 2 - available for pre-order now and releasing worldwide on November ...

by InfinityWard | 2 years ago | 4,232,511 views



iPod Touch Unboxing

Just wanted to share with you guys..... For those who want to follow me on twitter and get any inside info, follow me here: twitter.com For those ...

by itsmemorphious | 3 years ago | 1,235,005 views



Playstation Vita unboxing and initial impressions

Follow me on Twitter @kyletventytwo Much thanks for over 180000 views and over 1300 likes! You guys rock! Watch my Twitter feed and YouTube ...

HD by skyghene22 | 2 weeks ago | 251,445 views



Unboxing the iPad

Yes! Is the marvelous epic glory of a consumer device being removed from its packaging! Brought to you in living color!

by ihnatko | 1 year ago | 980,619 views

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

Who are my OOBЕ stakeholders?

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

A photograph of a person climbing a steep, layered rock face. The rock is a warm, golden-brown color with distinct horizontal strata. The climber is shirtless, wearing dark shorts and climbing shoes, and is positioned in the lower right quadrant of the frame, reaching up towards the rock. The background shows a clear blue sky at the top left.

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 OOB?

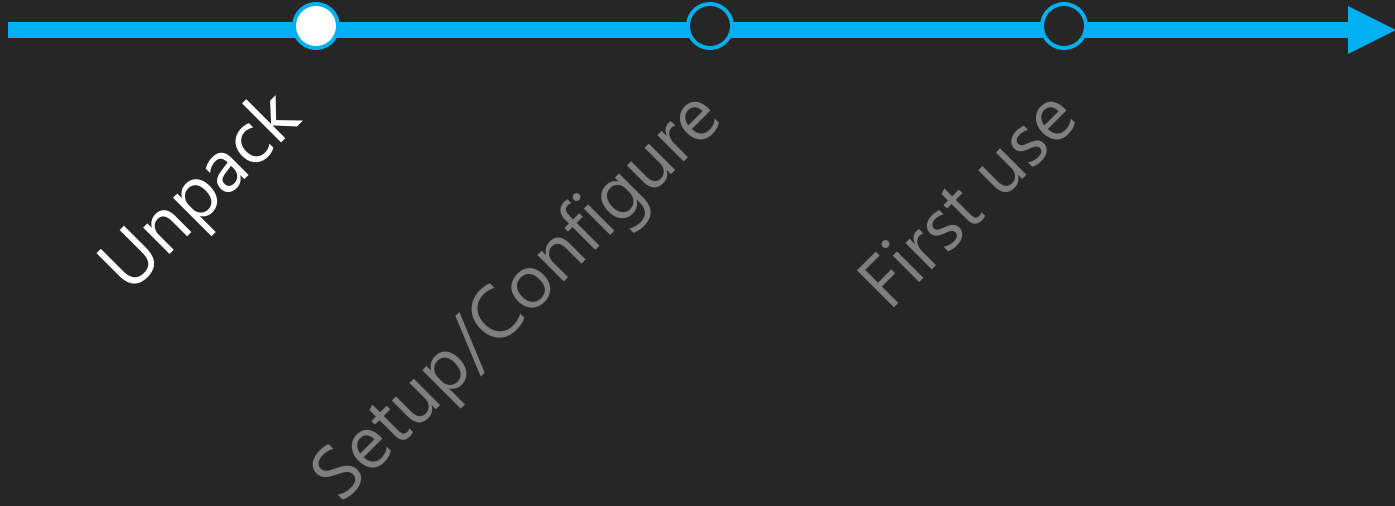
What are the pitfalls to avoid?

What are my experience goals?

A paved path with yellow lines leads into a dense forest. Sunlight filters through the trees, creating a bright glow at the end of the path. The path is made of concrete slabs and has yellow painted lines. The forest is lush with green foliage, including ferns and broad-leaved plants. The overall atmosphere is serene and natural.

How do I keep them on track?

The OOB E Stages



Keep track of the boxes

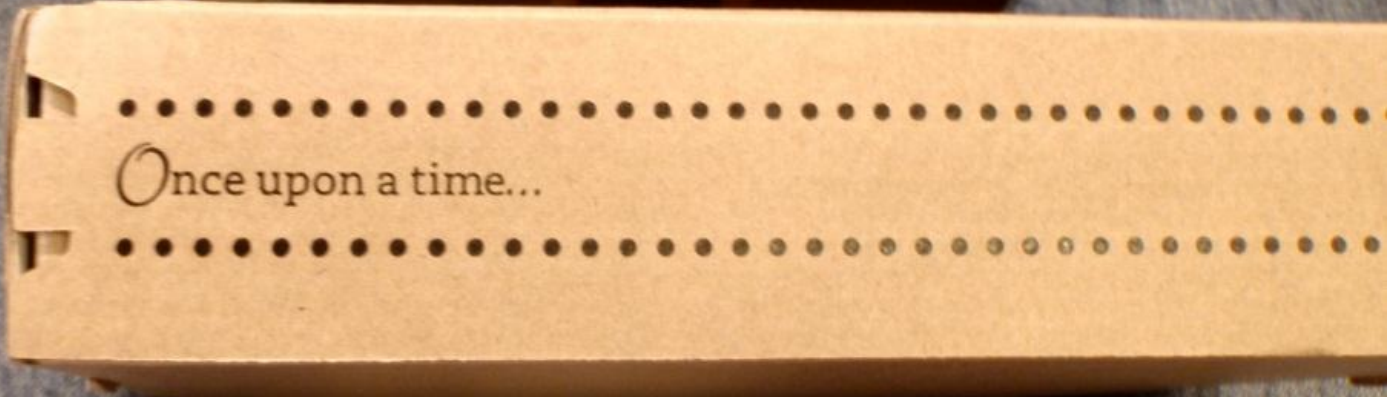
Do I have them all?

Which box comes first?

Do they look like they belong together?



Help them find the first opening

A photograph of a person's legs in blue jeans sitting on a chair. A long, narrow cardboard box is held horizontally across the lap. The box has two rows of small, evenly spaced circular holes. Between the two rows of holes, the words "Once upon a time..." are printed in a simple, black, serif font. The background shows the wooden legs of the chair and a carpeted floor.

Once upon a time...

Don't hurt them



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Treo, and associated marks are each trademarks
and operated companies. This product has not been
by the manufacturers of these products.



EASY OPEN TAB

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Made in China

Make it easy without using tools

Don't lead them astray



Make it hard to do it wrong



Integrate the experience





Minimize packaging waste

The OOB E 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 good chance you 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 finish.

 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. Instead, look for [answers](#) from the community, or search the [forum of past dragon slayers](#).

A person wearing a brown jacket, white t-shirt, and blue jeans is standing on a set of stone steps outdoors. They are holding a large, unfolded map in front of their face, completely obscuring it. The background shows green trees and a clear sky.

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



Figure out what belongs in each phase:

Setup?



Configuration?



First use?



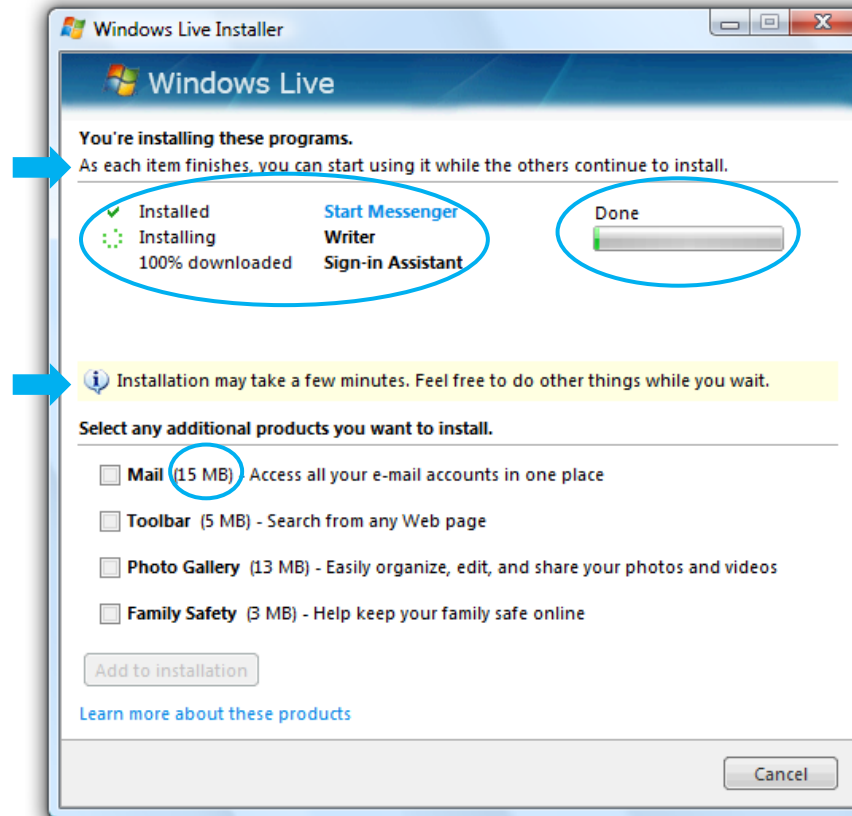
**Required?
All users?**

**Some users?
Personalization?**

Determine acceptable duration
Group sections requiring interaction

Manage the time for them

Let them feel in control



Let them know they are done



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

The screenshot shows the Facebook 'Find Friends' setup interface. At the top, the Facebook logo and a search bar are visible. Below the search bar is a progress indicator with three steps: 'Step 1 Find Friends', 'Step 2 Profile Information', and 'Step 3 Profile Picture'. The 'Step 1' tab is highlighted with a blue circle. Below the progress indicator is a section titled 'Are your friends already on Facebook?' with the text: 'Many of your friends may already be here. Searching your email account is the fastest way to find your friends on Facebook.' This section is also circled in blue. It contains four options for finding friends via email: 'Gmail' with a text input field and a 'Find Friends' button; 'Windows Live Hotmail' with a 'Find Friends' link; 'Yahoo!' with a 'Find Friends' link; and 'Other Email Service' with a 'Find Friends' link. At the bottom right of the section is a blue arrow pointing right with the text 'Skip this step'.

Kinect Sensor

KINECT™

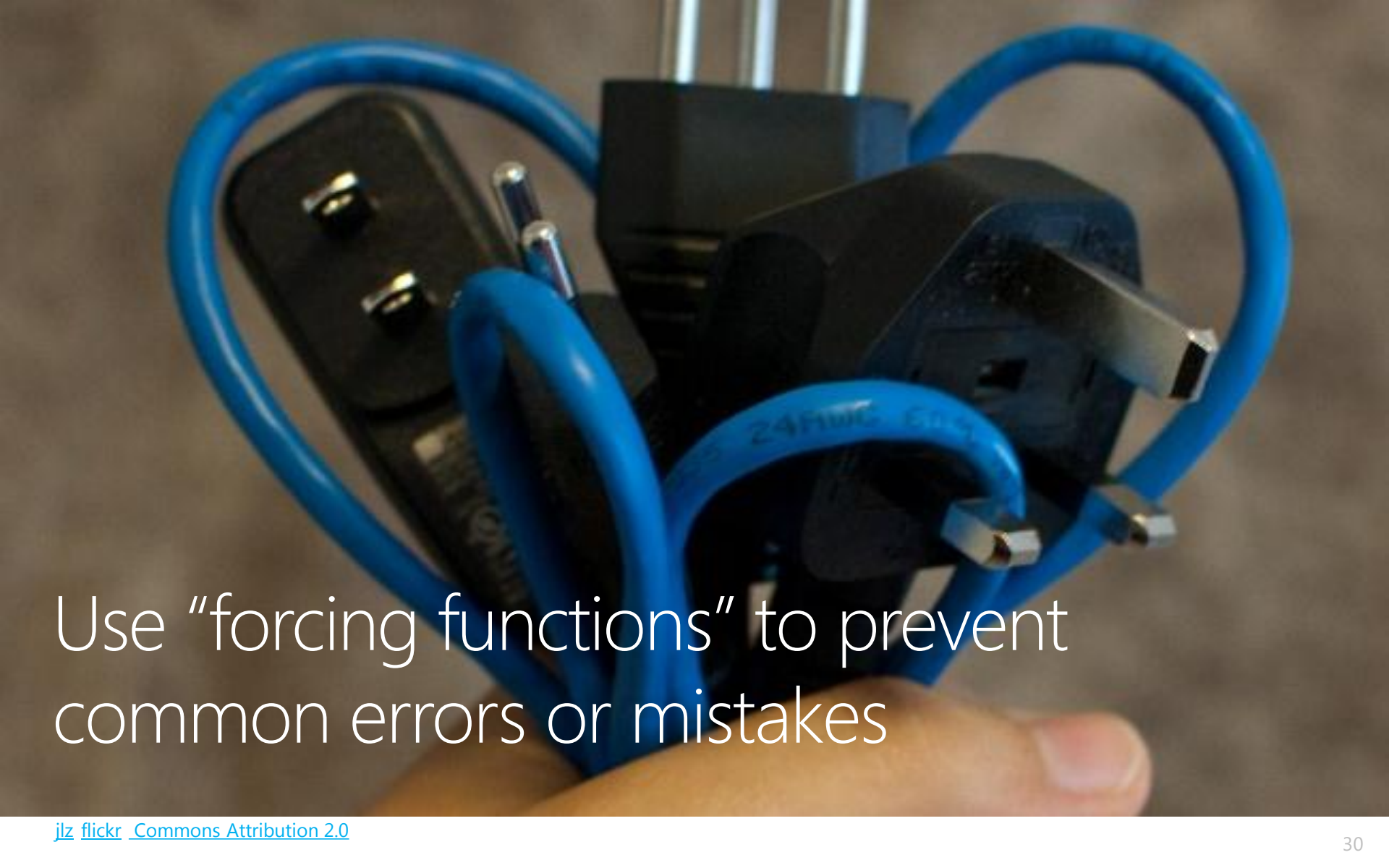
Ready to be the controller? Let's set up:

- Sensor placement
- Speech recognition & chat
- Play space



Walk them through necessary configuration

A Select

A close-up photograph of a hand holding a bundle of blue cables. The cables are tangled together, with various connectors visible. On the left, there is a black power plug with two gold-colored prongs. In the center, there is a black USB-C connector. On the right, there is a black connector with a silver metal tip. The background is a plain, light-colored surface.

Use “forcing functions” to prevent common errors or mistakes

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 OOB E Stages



A photograph of a theater stage. The stage is framed by a large archway with ornate carvings. Red curtains are pulled back, revealing a green curtain backdrop. In the center of the stage, there is a DJ setup with a turntable, a mixer, and two speakers. A ladder is visible on the left side of the stage. The theater seats are visible in the foreground, and the walls are painted a deep red. The text "It's show time!" is overlaid in the center of the image.

It's show time!

Don't overwhelm them



Get them right into the game



Provide just enough structure

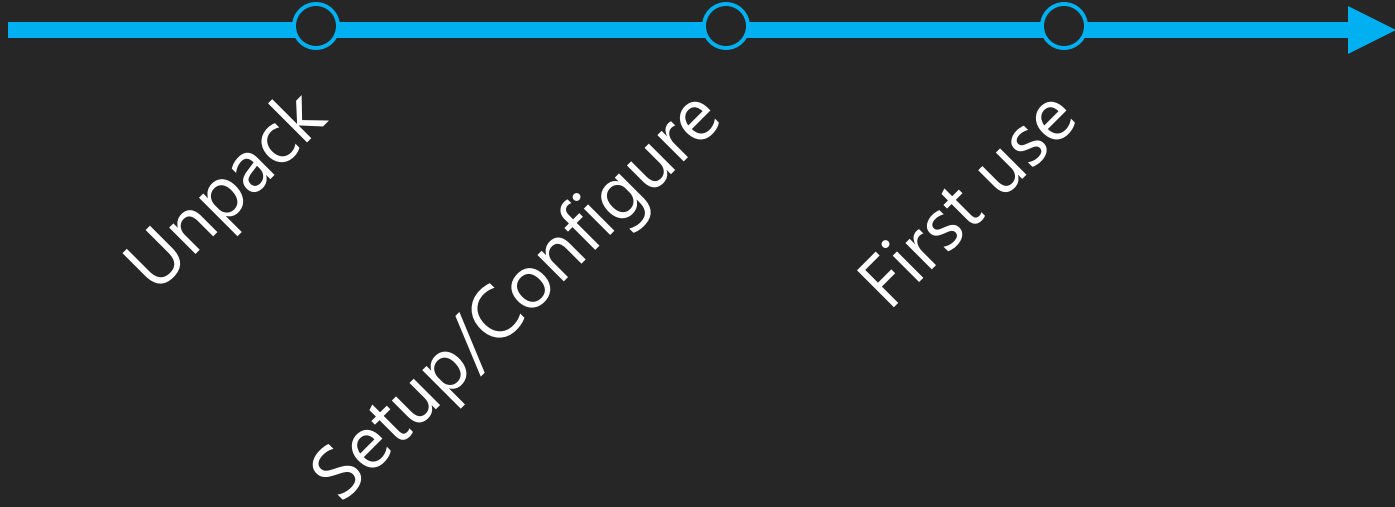
The screenshot shows the Facebook sign-up process for a user named Ben Smith. The page is annotated with four numbered steps and a callout box:

- Step 1:** "Search your email for friends already on Facebook". This step includes a text input field for "Your Email:" and a "Find Friends" button. A blue arrow points from this step to a callout box.
- Step 2:** "Upload a profile picture". This step features a large placeholder image of a person's head and shoulders, with options to "Upload a Photo" (From your computer) or "Take a Photo" (With your webcam).
- Step 3:** "Fill out your profile information". This step includes a brief instruction and an "Edit Profile" button.
- Step 4:** "Activate your mobile phone". This step includes two bullet points: "Receive texts with your friends' Status Updates and Messages instantly." and "Update your Status and Message friends using SMS."

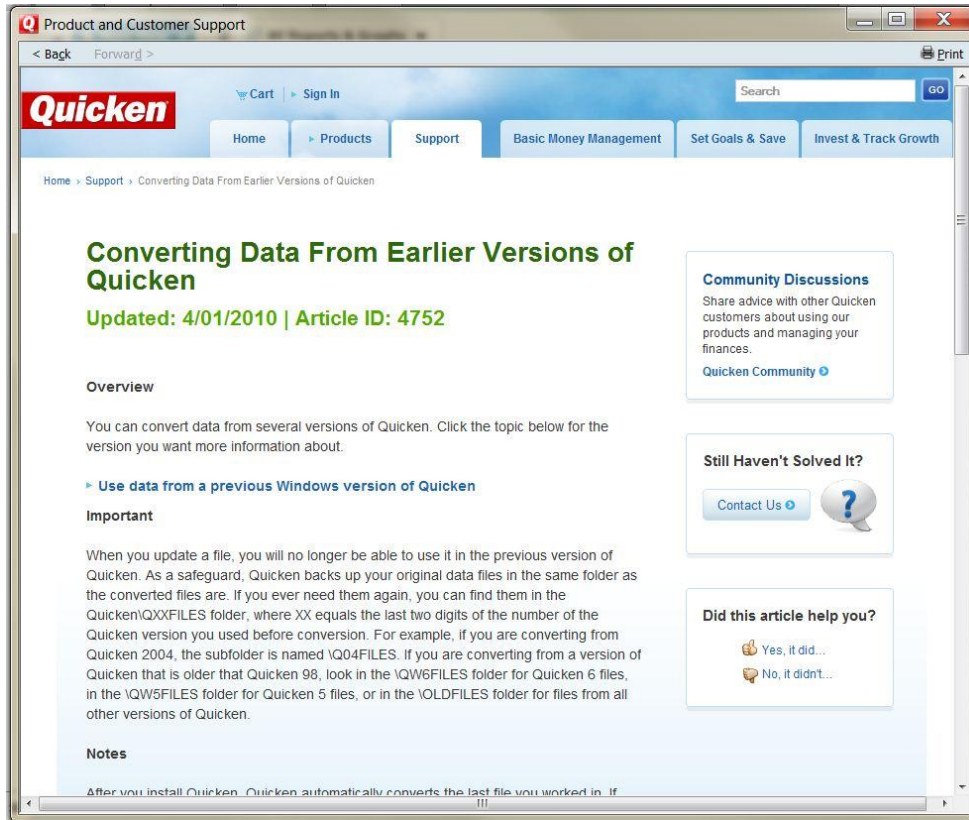
A callout box on the right side of the page, titled "Move your cursor around this page for an introduction to some of Facebook's key features.", is circled in blue. Below this callout is a "People You May Know" section, also circled in blue, which lists several suggested friends with their names and "Add as friend" buttons.

At the top of the page, a yellow banner contains the text "Ben, go to bensmi@hotmail.com to complete the sign-up process." and a "Go to your email" button, which is also circled in blue. A blue arrow points from the left towards this banner.

The OOB E Stages



What if things don't work out?



The screenshot shows a web browser window displaying a support article on the Quicken website. The browser's address bar shows the URL 'Product and Customer Support'. The page header includes the Quicken logo, navigation links for 'Home', 'Products', 'Support', 'Basic Money Management', 'Set Goals & Save', and 'Invest & Track Growth', and a search bar. The article title is 'Converting Data From Earlier Versions of Quicken', updated on 4/01/2010, with article ID 4752. The 'Overview' section explains that users can convert data from several versions of Quicken and provides a link to 'Use data from a previous Windows version of Quicken'. An 'Important' section details the file naming convention for converted files, such as 'Q04FILES' for Quicken 2004. A 'Notes' section at the bottom states that Quicken automatically converts the last file worked in after installation. On the right side of the article, there are three interactive sections: 'Community Discussions' with a link to the Quicken Community, 'Still Haven't Solved it?' with a 'Contact Us' button and a question mark icon, and 'Did this article help you?' with 'Yes, it did...' and 'No, it didn't...' feedback options.

- 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 OOB



Call to Action



- Don't neglect your OOB/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

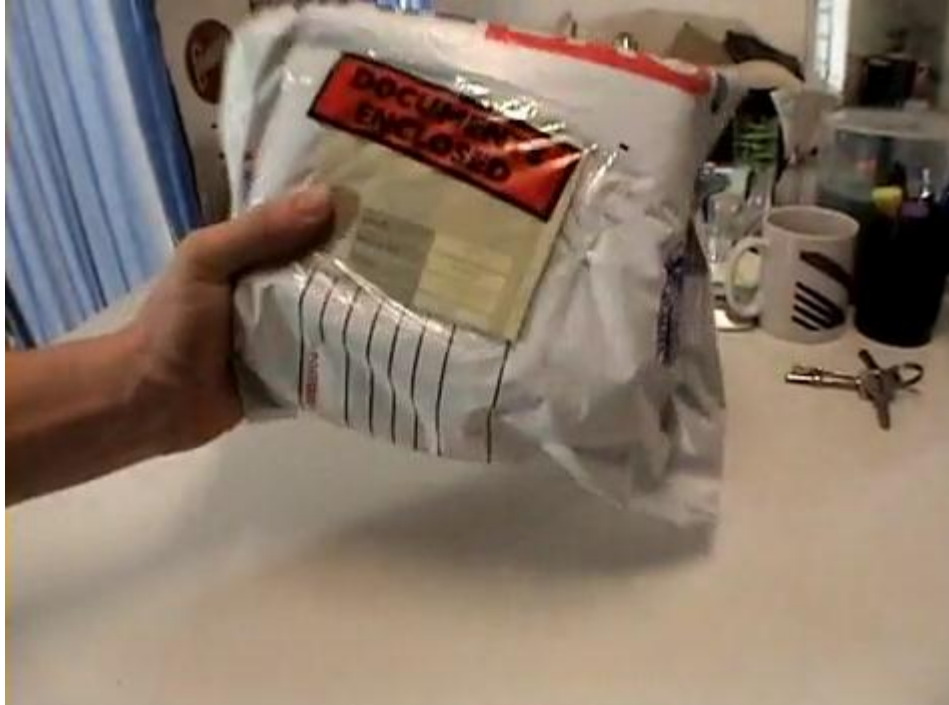
- IBM Design Site about Initial Experience
 - <http://www-01.ibm.com/software/ucd/initial.html>
- *The Experience Economy: Work Is Theater & Every Business a Stage*
 - By B. Joseph Pine and James H. Gilmore
 - http://www.amazon.com/Experience-Economy-Theater-Every-Business/dp/0875848192/ref=sr_1_1?ie=UTF8&qid=1294817724&sr=8-1
- 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 OOB E 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

Best Unboxing Ever – Samsung Omnia i900



<http://www.youtube.com/watch?v=QQIzX7EylwU>

Thank You!