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
OOBE and the Product Lifecycle

Identify need
Research product
Acquire
Unpack
Setup/Configure
First use
Ongoing use
Discard/replace

OUT OF BOX EXPERIENCE
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 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)

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What are my experience goals?

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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How do I keep them on track?
The OOBE Stages

Unpack → Setup/Configure → First use
Keep track of the boxes

Do I have them all?
Which box comes first?
Do they look like they belong together?

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Help them find the first opening

Once upon a time...
Don’t hurt them
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 OOBE Stages

Unpack

Setup/Configure

First use
Manage dependencies

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

Here Be Dragons

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'll burn your hands, scorch the clothes off your back somewhere along the way, so we'll also send you a free, limited-edition Atlassian Dragon Slayer 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 reissue a support ticket for the product you're stuck on. Please don't try to battle on alone. Instead, ask questions on the forum of past dragon slayers.

Make it easy to find Setup

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

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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
Walk them through necessary configuration
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

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The OOBE Stages

- Unpack
- Setup/Configure
- First use
It’s show time!
Don’t overwhelm them

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Get them right into the game

http://www.popcap.com
Provide just enough structure
The OOBE Stages

Unpack

Setup/Configure

First use
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

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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

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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

• 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
Best Unboxing Ever – Samsung Omnia i900

http://www.youtube.com/watch?v=QQlzX7EylwU
Thank You!