



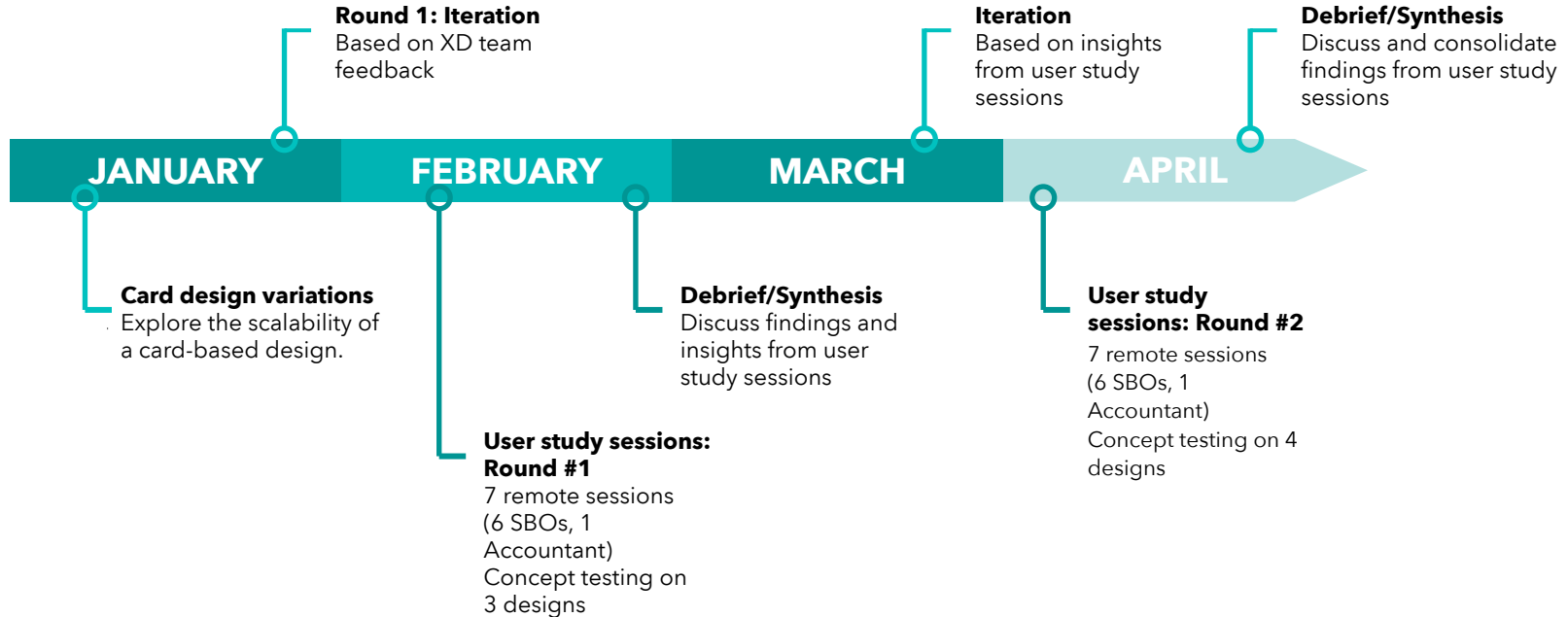
# QBOP

## Employees List & Overview Page Learnings

04/21/2020

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# Project Timeline



# Part 1: Employees List

# Employees List

Employees Run payroll Next payroll due Friday, 2020-05-01 [Paycheque list](#) PRIVACY

Find an employee  Active Employees Invite to Workforce Add an employee

NAME ▲	PAY RATE	PAY METHOD	PAY SCHEDULE	STATUS
Bread, Ginger	\$35.00/hour	Cheque	Every Friday	Active
Charms, Lucky	\$25.00/hour	Cheque	Every Friday (delay)	Active
Graham, Teddy	\$50.00/hour	Cheque	Every Friday	Active
Monster, Cookie	\$120,000.00/year	Cheque	Every Friday	Active

US Employees list currently in-product

## Background:

Central team proposed a card-based design for the Employees List screen with a focus on the US market.

However, it is ***not compliant with the Canadian side and does not taking into account each employee's vacation accrual.*** We also want to consider the aspect of scalability of a card design with multiple columns.

# Employees List

## Objective – Dig Deeper into Customer Problems

For the Employees List page, we want to explore implementations of a vacation accrual column and run user study sessions with SBOs and Accountants. We want to get feedback on different iterations of a card-based design in order to see how it fits for our Canadian customers.

As well, we would like to:

- (1) Learn about the various cases of when a user may need to access the Employees List
- (2) Identify the type of information for their employees users would prioritize

# Round 1 iteration: Test A

Employees

Next payroll due Friday, 6/7/2019  
[Paycheck list](#)

**Run payroll**

Automate time tracking; save 3 hours per payroll run.  
[Try TSheets free](#)

PRIVACY

Find an employee  Active employees

NAME	PAY RATE	PAY METHOD	PAY FREQUENCY	AVAILABLE VACATION	STATUS
Carl Stigall	\$40,000.00/year	Check, Direct deposit	Bi-weekly	45hrs (\$899.00)	Active
Stephanie Southerland	\$43,000.00/year	Direct deposit	Weekly	45hrs (\$899.00)	Active
Barbara Parker	\$18.00/hour	Check	Bi-weekly	45hrs (\$899.00)	Active
Ryan Meadows	\$19.50/hour	Check, Direct...	Bi-weekly	45hrs (\$899.00)	Active
Christopher Shaffer	\$21.00/hour	Check, Direct...	Bi-weekly	45hrs (\$899.00)	Active

Truncated text with tooltip on hover

Status state shown as the word "Active"/"Inactive"

# Round 1 iteration: Test B

intuit quickbooks

BOLT CONSTRUCTION

Overview Employees

## Employees

Next payroll due Friday, 6/7/2019  
[Paycheck list](#)

[Run payroll](#)

Automate time tracking; save 3 hours per payroll run.  
[Try TSheets free](#)

PRIVACY

Find an employee  All employees

NAME	PAY RATE	PAY METHOD	PAY FREQUENCY	AVAILABLE VACATION	STATUS
Carl Stigall <a href="mailto:carl_stigall@intuit.com">carl_stigall@intuit.com</a>	\$40,000.00/year	Check Direct deposit	Bi-weekly	45hrs (\$899.00)	<span style="color: green;">●</span>
<b>Phone</b> (647) 123-4567 <b>Address</b> 555 Homestead Rd Toronto, ON M1P4W2 <a href="#">View more</a>	\$40,000.00/year	Direct deposit	Weekly	45hrs (\$899.00)	<span style="color: green;">●</span>
<a href="mailto:carol_parker@intuit.com">carol_parker@intuit.com</a>	\$18.00/hour	Check	Bi-weekly	45hrs (\$899.00)	<span style="color: grey;">●</span>
Ryan Meadows <a href="mailto:ryan_meadows@intuit.com">ryan_meadows@intuit.com</a>	\$19.50/hour	Check	Bi-weekly	45hrs (\$899.00)	<span style="color: green;">●</span>
Christopher Shaffer	\$20.00/hour	Check	Bi-weekly	45hrs (\$899.00)	<span style="color: green;">●</span>

Employee email with tooltip that expands to show employee details on hover

Payment method text stacked

Visual icon to indicate employee status

# Round 1 iteration: Test C

intuit quickbooks

BOLT CONSTRUCTION

Overview Employees

## Employees

Next payroll due Friday, 6/7/2019  
[Paycheck list](#)

[Run payroll](#)

Automate time tracking; save 3 hours per payroll run.  
[Try TSheets free](#)

PRIVACY

Find an employee  All employees

NAME	JOB TITLE	PAY RATE	PAY METHOD	PAY FREQUENCY	AVAILABLE VACATION	STATUS
<b>Carl Stigall</b> <a href="#">carl_stigall@intuit.com</a>	Content designer	\$40,000.00/year	Check Direct deposit	Bi-weekly	45hrs (\$899.00)	●
<b>Phone</b> (647) 123-4567	✕	\$40,000.00/year	Direct deposit	Weekly	45hrs (\$899.00)	●
<b>Address</b> 555 Homestead Rd Toronto, ON M1P4W2		\$18.00/hour	Check	Bi-weekly	45hrs (\$899.00)	●
<a href="#">View more</a>						
<a href="#">ryan_meadows@intuit.com</a>	support	\$19.50/hour	Check	Bi-weekly	45hrs (\$899.00)	●
<b>Christopher Shaffer</b> <a href="#">christopher_shaffer@intuit.com</a>	Product designer	\$20.00/hour	Check	Bi-weekly	45hrs (\$899.00)	●
<b>Kathleen Brown</b> <a href="#">kathleen_brown@intuit.com</a>	Technical support	\$22.00/hour	Direct Deposit	Weekly	45hrs (\$899.00)	●

Additional job title column

Reduced white space between each card



# Employees List: Participant Profile

## Round 1 user sessions:

- Mainly SBOs, open to accountants
- 7 participants: 6 SBOs, 1 Accountant
- Uses QBOP and at least 3 pay types to pay their employees
- Have a mix of salaried and hourly employees
- Users have between 4-15 employees

# Employees List: Learnings



**The type of information SBOs want to see is dependent on the size of their business.**

Leveraging the employees' job title and contact number is not relevant to them because they know their employees well enough and/or store numbers on their phone.

Customization of columns will allow for personalization and flexibility for each business size.

NAME ▲	PAY RATE	PAY METHOD	PAY FREQUENC
Carl Stigall <a href="mailto:carl_stigall@intuit.com">carl_stigall@intuit.com</a>	\$40,000.00/year	Check Direct deposit	Bi-weekly
<span>!</span> Phone (647) 123-4567 Address 555 Homestead Rd. Toronto, ON M1P4W2 <a href="#">View more</a>	\$40,000.00/year	Direct deposit	Weekly
<a href="#">View more</a>	\$18.00/hour	Check	Bi-weekly



*“I could care less about the job title because I know what everybody’s job title is and I don’t really need to see that.”*

*– Ewan Mason*

# Employees List: Learnings



**They want to be informed of how many hours they have tracked for each employee.**

Especially when they may be paying a lot of money for very little sales, they want to know how their payroll costs look like in relation to their business growth.



**There is interest in seeing the expected paycheck and year-to-date for each employee.**



*"I'm paying a lot of money for very little sales. I always like to know how much I put out. **I know how much I'm bringing in, but I don't always know how much is going out the door.**"*

*– Daniel Nguyen, Brooklyn Paper Group*

# Employees List: Learnings



There is value in showing the outstanding hours and dollar amount of employees' vacation.



*"I have a spreadsheet [to track available vacation], just because **it was more challenging to look at it quickly in QuickBooks and find it so I just decided I would just keep my own spreadsheet.**"*  
– Kristen Robinson, Saugeen Shores Vision Therapy Centre

# Part 2: Overview page

# Overview Page

## Learning Objective:

In the Employees section on QBOP, gain insights on a proposed Overview implementation in conjunction with the Employees List. We want to test the Overview page with various combinations of data and receive feedback from Canadian users. As well, to understand what types of data is most relevant and important to them from a payroll perspective.

# Round 2 User Sessions: **Controlled**

intuit quickbooks BOLT CONSTRUCTION

+ New

Overview Employees

### Action required

Cross this task off your to do list before April 6 to run payroll on time.

[View paycheck list](#)

**Your account is on hold, contact us** [Start](#)

#### SHORTCUTS

- Pay employees
- Add employee
- Payroll reports
- Timesheet

#### TO DO

##### Connect your bank for direct deposit

We'll walk you through adding your bank info so you can pay employees with free direct deposit.

[Let's go](#)

##### Add tax info for John

Enter John's TD1 info so we know how much income tax to withhold from his pay.

[Start](#)

#### SPOT THE DIFFERENCE

##### Employees vs. contractors

They might look the same, but there are important differences you need to know.

[Read more](#)

intuit quickbooks BOLT CONSTRUCTION

+ New

Overview Employees

## Employees

Next payroll due Friday, 6/7/2019 [Paycheck list](#)

Automate time tracking; save 3 hours per payroll run. [Try TSheets free](#)

[Run payroll](#)

PRIVACY

Find an employee [Active employees](#) [Add an employee](#)

NAME	PAY RATE	PAY METHOD	PAY FREQUENCY	AVAILABLE VACATION	STATUS
Carl Stigall	\$40,000.00/year	Check, Direct...	Bi-weekly	45hrs (\$899.00)	Active
Stephanie Southerland	\$43,000.00/year	Direct deposit	Weekly	45hrs (\$899.00)	Active
Barbara Parker	\$18.00/hour	Check	Bi-weekly	45hrs (\$899.00)	Active
Ryan Meadows	\$19.50/hour	Check, Direct...	Bi-weekly	45hrs (\$899.00)	Active
Christopher Shaffer	\$21.00/hour	Check, Direct...	Bi-weekly	45hrs (\$899.00)	Active

# Round 2 User Sessions: Version 1

**ESTIMATED GROSS PAYROLL**  
MAY 22 (5 EMPLOYEES)  
**\$9,700.00**  
UPCOMING IN 4 DAYS

**\$5,500.00** Net payroll  
**\$3,200.00** Payroll tax

**Run payroll**

**SHORTCUTS**

- Pay employees
- Add employee
- Payroll reports
- Timesheet

**TOTAL PAYROLL COSTS**  
LAST QUARTER  
**\$35,000.00**

Line graph showing payroll costs from Jan to May. A tooltip for May 1-15 shows: Gross payroll: 16,500.00, Net payroll: 13,700.00.

**Run payroll by 5:00pm for May 8-22 pay period**

**Payroll taxes due** Jun 01

**CELEBRATE**  
Ryan Meadow's birthday March 20th

**RRSP (SUNLIFE)**  
**\$2,540**

**TO DO**  
Connect your bank for direct deposit  
We'll walk you through adding your bank info so you can pay employees with free direct deposit.  
**Let's go**

Run Payroll CTA only in Overview page

**Find an employee** All employees Add an employee

NAME	PAY RATE	PAY METHOD	PAY FREQUENCY	AVAILABLE VACATION	YEAR TO DATE	STATUS
Carl Stigall	\$40,000.00/year	Check, Direct...	Bi-weekly	45Hrs (\$899.00)	\$10,000.00	Active
Stephanie Southerla...	\$43,000.00/year	Direct deposit	Weekly	45Hrs (\$899.00)	\$10,750.00	Active
Barbara Parker	\$18.00/hour	Check	Bi-weekly	45Hrs (\$899.00)	\$10,750.00	Inactive
Ryan Meadows	\$19.50/hour	Check, Direct...	Bi-weekly	45Hrs (\$899.00)	\$10,750.00	Active
Christopher Shaffer	\$21.00/hour	Check, Direct...	Bi-weekly	45Hrs (\$899.00)	\$10,750.00	Inactive
Kirk Zimmerman	\$23.50/hour	Direct deposit	Bi-weekly	45Hrs (\$899.00)	\$10,750.00	Inactive
Kirstie Wall	\$19.50/hour	Check	Weekly	45Hrs (\$899.00)	\$10,750.00	Active
Jordan Andrews	\$22.00/hour	Check, Direct...	Weekly	45Hrs (\$899.00)	\$10,750.00	Active

To Do reminds users to run payroll 2 days prior and when taxes are due



# Round 2 User Sessions: Version 2a

The screenshot shows the 'Employees' overview page in QuickBooks. At the top, it displays 'ESTIMATED GROSS PAYROLL' of \$9,700.00 for May 22 (5 employees), with a warning 'UPCOMING IN 4 DAYS'. Below this, a bar chart shows 'Net payroll' at \$5,500.00 and 'Payroll tax' at \$3,200.00. The 'TOTAL PAYROLL COSTS' section shows \$35,000.00 for the last quarter, accompanied by a line graph. The 'TO DO' section includes a task to 'Run payroll by 5:00pm for May 8-22 pay period' and 'Payroll taxes due' on June 01. There are also sections for 'CELEBRATE' (Ryan Meadow's birthday) and 'RRSP (SUNLIFE)' with a total of \$2,540.

This screenshot shows the 'Employees' list view. A teal box highlights the 'Run payroll' button in the payroll summary section. Below the summary is a table of employees with the following columns: NAME, PAY RATE, PAY METHOD, PAY FREQUENCY, AVAILABLE VACATION, YEAR TO DATE, and STATUS.

NAME	PAY RATE	PAY METHOD	PAY FREQUENCY	AVAILABLE VACATION	YEAR TO DATE	STATUS
Carl Stigall	\$40,000.00/year	Check, Direct...	Bi-weekly	45hrs (\$899.00)	\$10,000.00	Active
Stephanie Southerla...	\$43,000.00/year	Direct deposit	Weekly	45hrs (\$899.00)	\$10,750.00	Active
Barbara Parker	\$18.00/hour	Check	Bi-weekly	45hrs (\$899.00)	\$10,750.00	Inactive
Ryan Meadows	\$19.50/hour	Check, Direct...	Bi-weekly	45hrs (\$899.00)	\$10,750.00	Active
Christopher Shaffer	\$21.00/hour	Check, Direct...	Bi-weekly	45hrs (\$899.00)	\$10,750.00	Inactive
Kirk Zimmerman	\$23.50/hour	Direct deposit	Bi-weekly	45hrs (\$899.00)	\$10,750.00	Inactive

Showing estimated gross payroll with Run Payroll CTA in Employees list

# Round 2 User Sessions: Version 2b (Carousel)

quickbooks BOLT CONSTRUCTION

Overview Employees

ESTIMATED GROSS PAYROLL **\$9,700.00**  
MAY 22 (5 EMPLOYEES) UPCOMING IN 4 DAYS

SHORTCUTS

- Pay employees
- Add employee
- Payroll reports
- Timesheet

TO DO

- May 20 Run payroll by 5:00pm for May 8-22 pay period
- Jun 01 Payroll taxes due

CELEBRATE

Ryan Meadow's birthday March 20th

RRSP (SUNLIFE) **\$2,540**

Net payroll: \$5,500.00 | Payroll tax: \$3,200.00

quickbooks BOLT CONSTRUCTION

Overview Employees

TOTAL PAYROLL COSTS **\$35,000.00**  
LAST QUARTER

Line graph showing payroll costs for the last quarter (Jan to May).

SHORTCUTS

- Pay employees
- Add employee
- Payroll reports
- Timesheet

TO DO

- May 20 Run payroll by 5:00pm for May 8-22 pay period
- Jun 01 Payroll taxes due

CELEBRATE

Ryan Meadow's birthday March 20th

RRSP (SUNLIFE) **\$2,540**

Consolidating data graphs into a carousel

# Overview Page: Participant Profile

## Round 2 user sessions:

- 7 participants
- 6 SBOs, 1 Accountant
- Uses QBO Payroll (not Advanced Payroll users)
- Have a mix of salaried and hourly employees
- Users have a minimum of 3 employees
- They are the one who runs payroll

# Overview Page: Learnings



**Participants would prioritize the Overview page and prefer to land on it every time over the Employees list.**

They like the convenience of being able to quickly see payroll data about their business. They prefer to see Run Payroll CTA in the Overview page OR in both Overview and Employees list page.



*"It forces me to see stuff and **it's just an easier way for me to stay on top of things** so that's why I'd like it to land on this Overview page because the list of employees I've already got it all in my head."*

*– Karen Gatreau, Sound House Studios*

# Overview Page: Learnings



**Participants prefer to see different data graphs at a glance, rather than the consolidation of data into a carousel.**

They want to be able to access data in fewer number of clicks.



*"I usually have too much to do and I don't always get to looking at the numbers and figures, which is why these charts and graphs are useful for me. **I really should be doing this stuff on a monthly basis and I don't.**"*

*– Karen Gatreau, Sound House Studios*

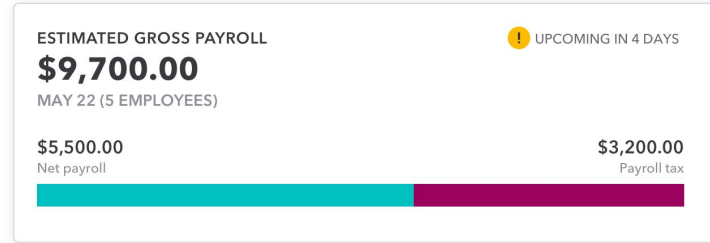
*"... if [the total payroll cost] is visible, I feel that much more comfortable and it's one glance that it makes me understand my business."*

*– Ankush Biswas, Hillside Retirement*

# Overview Page: Learnings



Accountants don't find estimations helpful, but SBOs like to see it in order to have a rough idea of how much they're spending.



"It's just nice when I'm doing books in general and especially in cases like COVID, what were my payroll costs, how much do I have the next three months, how many expenses am I going to have and what's my income going to look like... **having it right there is quick and easy instead of having to run a report.**"

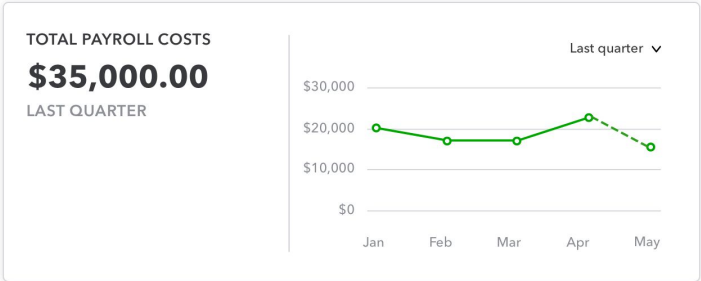
– Kristen Robinson, Saugeen Shores Vision Therapy Centre

# Overview Page: Learnings



**Participants mentioned that they prefer to see trends on a long-term basis.**

They expressed interest in a comparison of month-by-month payroll costs or yearly trend rather than see it on a quarterly basis.



# Overview Page: Learnings



**Birthday and work anniversary reminders are an added value so employers can show that they care about their employees.**



**Because payroll is a huge expense, useful tips and strategies are another added value to save money.**

CELEBRATE



Ryan Meadow's birthday  
March 20th



**Next steps**