

DECEMBER 2023

On-Demand Video Invitation

**H&R
BLOCK**



Agenda

- 1 Project Brief
- 2 Project Overview
- 3 Research & Design Process
- 4 User Interview & Usability Test Findings
- 5 Outcomes & Next Steps

Project Brief

Since the pandemic, H&R Block has been pushing their tax professionals to have **more virtual appointments** with clients through their secure video call technology, however, adoption of video appointments has **remained low year-over-year**.

I was tasked to **understand why adoption of video appointments was low**, discover the **needs** and **pain points** of the **tax professionals**, and collaborate with Design and Product partners to develop a solution to **increase the usage of video appointments**.

Project Overview

My role & responsibilities

- UX Researcher
- Created research plan
- Reviewed past research
- Drafted user interview discussion guide and usability test script
- Coordinated and scheduled tests
- Facilitated interviews & usability tests
- Synthesized data
- Collaborated with designer to oversee translation of insights into design decisions
- Presented findings to stakeholders

Who I worked with

- Senior UX Designer (collaborator)
- Product Manager (stakeholder)
- Product Leader (stakeholder)
- Content Designer (collaborator)
- Legal Team (consultants)

Project timeline

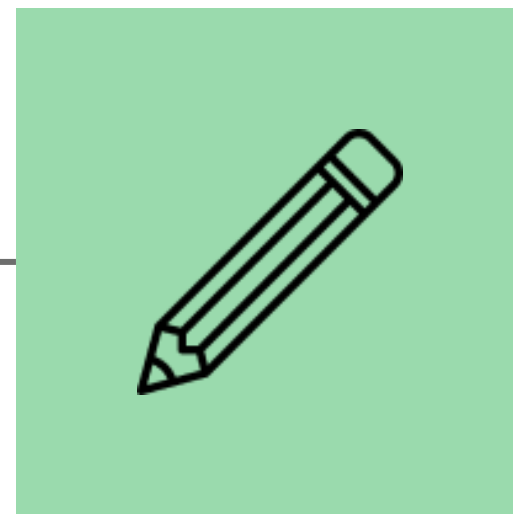
- ~6 months from idea to implementation
- ~6 weeks active research and design
- Occasional check-ins throughout phases of implementation

Research & Design Process



Discovery

- Analyzed existing research
- Interviewed tax pros in working groups
- Stakeholder interviews
- User interviews with tax pros



Definition

- Synthesized findings
- Refined problem statement



Design

- Design ideation
- Created mockups and prototype
- Usability tests with tax pros



Delivery

- Analyzed feedback from testing
- Design changes
- Research report & share-out with stakeholders
- Check-ins with Design, Product, Content, and Devs throughout implementation



Analysis of Existing Research

- Clients and Tax Professionals feel that there are **too many steps** to make it to the video appointment, which **prevents Tax Pros from wanting to offer the service to their clients.**
- Many Tax Pros have spent the **majority of their video appointments troubleshooting** with their clients, forcing them to reschedule or finding workarounds like using **Teams or phones.**
- Tax pros often have **little insight into how a client can join a video appointment** through MyBlock.
- Currently, video appointments can only be **scheduled 3 days in advance**, no same day appointments.
- Tax Pros feel that **client entry to video calls** is the **largest issue** they face when it comes to video appointments.

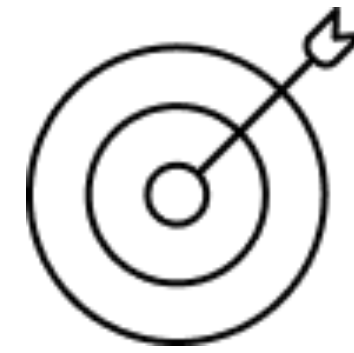


User Interview Overview



Participant Information

- 7 Tax Professionals
- 3 Corporate, 4 Franchise
- All had previous experience having video appointments with clients



Interview Goals

- Validate/Invalidate findings, assumptions and anecdotes from existing research
- Uncover current needs and pain points of tax pros and clients
- Understand what was working well and what needs improvement in video appointment experience



Questions Asked

- In what circumstances would you typically have a video appointment with a client?
- Which features did you use within the video appointment experience? How did they help you to help your client?
- Is there anything you wanted to do during video appointments but couldn't?



User Interview Findings

- In most video appointments, Tax Pros typically go over the **standard tax interview, review the client's return**, and help them understand which **documents they need** to complete their return.
- **5/7** users reported that **screen sharing** (on both sides) helps **clients understand their return** and helps Tax Pros understand **where the client is getting stuck** = returns completed more efficiently.
- **5/7** users said that **clients often have trouble finding the link** to join the video appointment, which leads to the following process:
 - Client calls Tax Pro to troubleshoot
 - Tax Pros have **little visibility into client's experience, cannot resend video link** to client, and **cannot reschedule** another video call **within client's appointment window**
 - If troubleshooting is unsuccessful, appointment will continue over the **phone**, client suggests a **video call on another platform** (Teams, Zoom, etc), or Tax Pro will reschedule appointment for **in-office**.



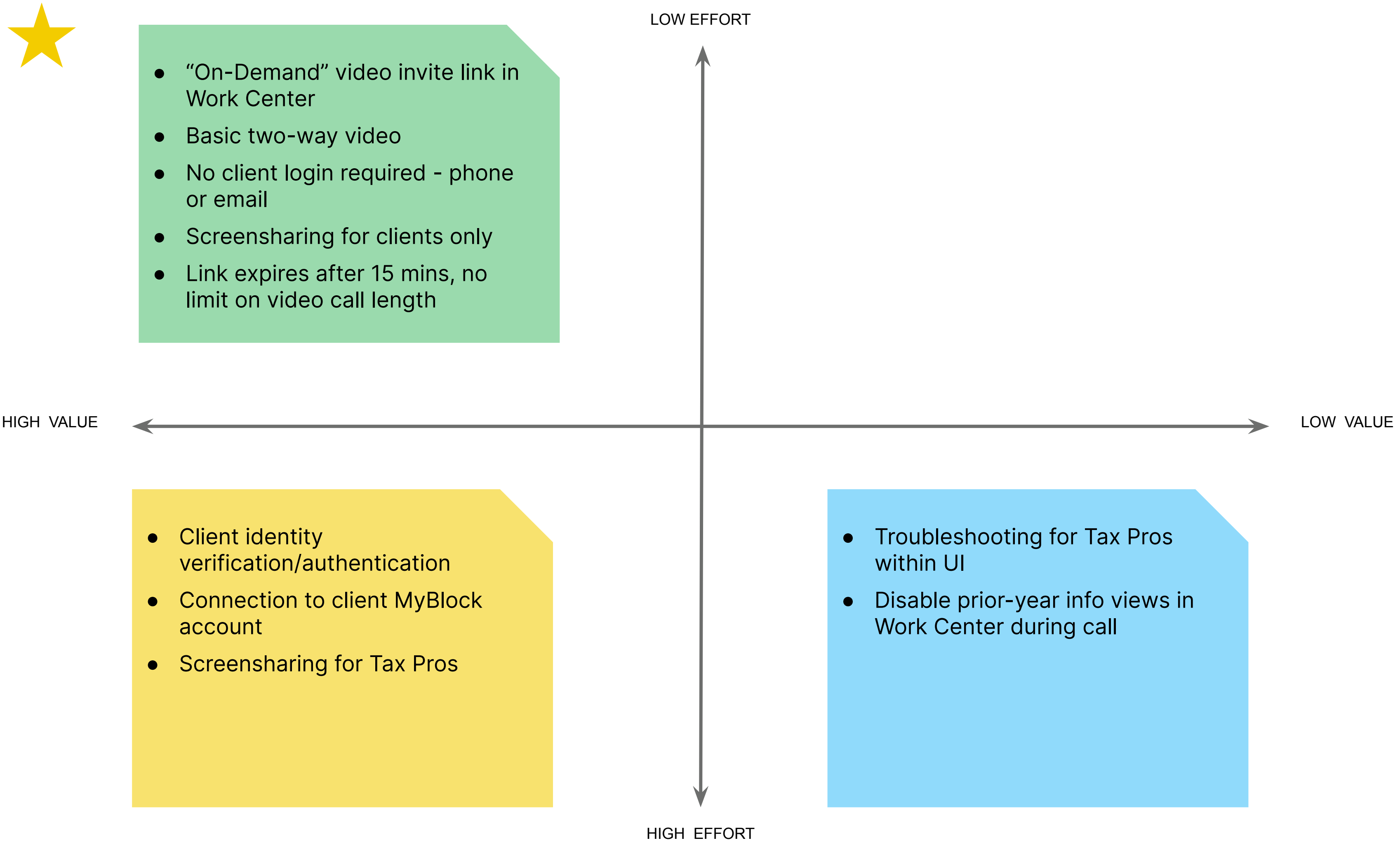
Problem Statement

Tax Pros are often unable to have successful video appointments with their clients due to confusion with the joining process and lack of ability to resend the invitation within the appointment time.

How might we make it possible for Tax Pros to start a quick, easy, and secure video call with a client?



Feature Prioritization & Ideation



Usability Test Overview



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Scenario & Task

Imagine you are about to have a scheduled video appointment with your client, Josephine A Malone, when she tells you she is having trouble joining the call. You don't want to reschedule her appointment for another day, so you try to come up with a solution to help her right now.

Another Tax Pro in your office just told you about a new feature in Work Center that allows you to invite a client to join a video call instantly, so you decide to give it a try.

Task: From the Client Page in Work Center, walk me through how you would invite Josephine to join the instant video call.



Questions Asked

- What did you think of that experience?
- In which circumstances would you use this feature vs. the scheduled video appointment feature?
- How do you think clients will feel about this feature?

On-Demand Video Invitation Prototype

[View prototype](#)



Usability Test Findings

- **7/7** users had **difficulty** finding where to send the **video call invitation link**.
- **3/7** thought they would find it from the **“Set Appointment”** button.
- **3/7** clicked the ellipse, looked at the dropdown menu and thought it was somewhere else.
- Despite their initial difficulty finding the invitation, when they found it, all users claimed having it under “Send Invite” would be **exactly where they would expect to find it**.

WORK CENTER Home Dashboards **Clients** Campaigns Messages ¹

Josephine A. Malone
SSN: ... 1234 DOB: 09/14/1990

Price Estimate Tool
Opt-out Tool
Send Invite
Edit Profile

Profile Activities Messages Text

Contact Information

Service Information

Service: Returning continuously for 10 years Complexity: 5 Small Business

MyBlock Account Information

Status: Active - Verified

Services Documents Communication **Appointments** Business Invoices

Upcoming Appointments **SET APPOINTMENT**

SERVICE TYPE	DATE	TIME
Tax Prep (Appt)	July 26, 2022	5:00 PM
Tax Pro Jeanne Tyne	Location 115 N Elm St	Tax Pro Requested? No
Status Scheduled	Complexity 5 Small Business	Spanish Preferred? No

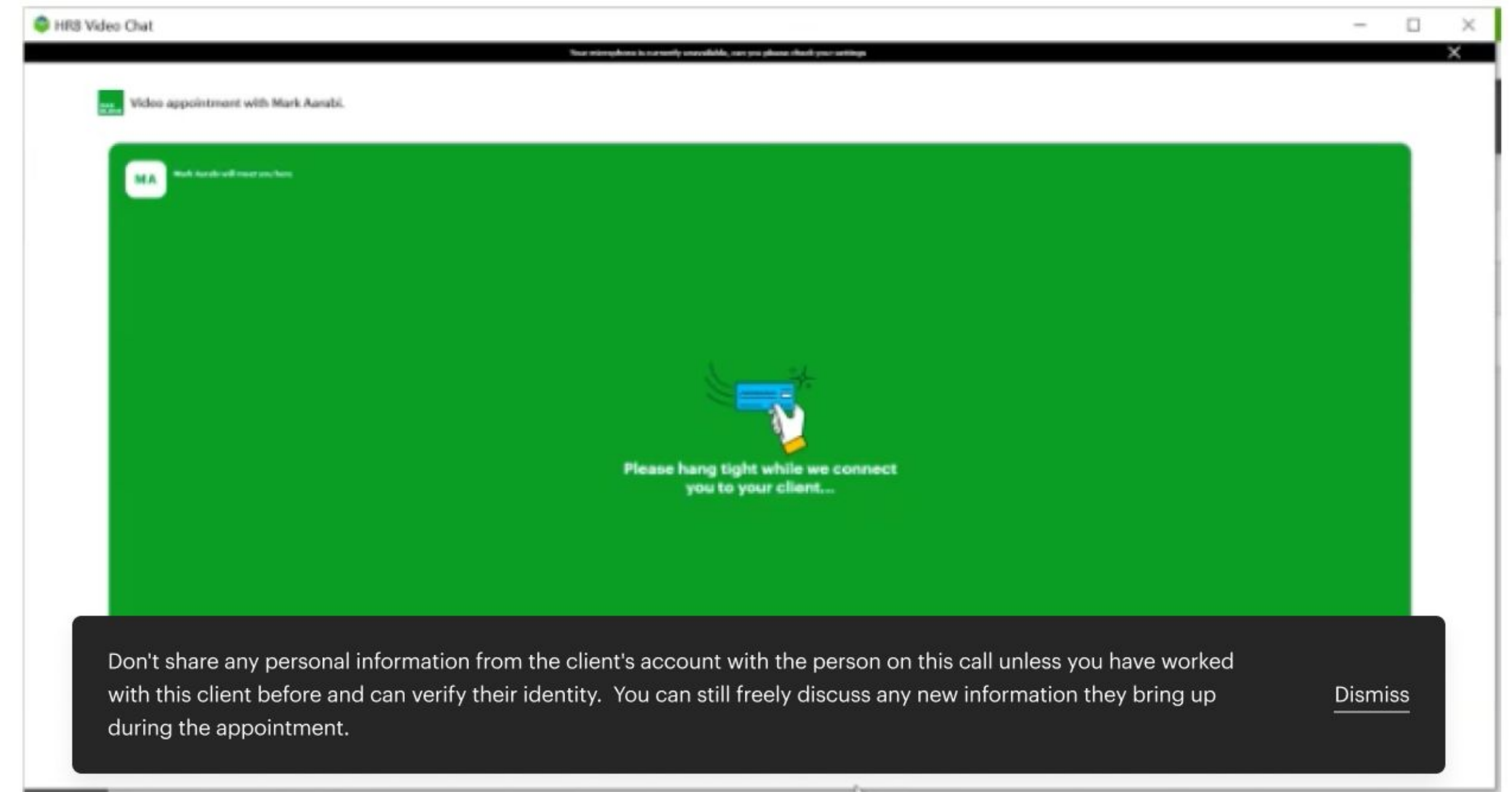
SEE MORE DETAILS **OPEN RETURN**

Client Page in Work Center



Usability Test Findings

- Once the video invitation option was found, all users felt the flow was very **easy and intuitive**.
- All users felt that this feature would be a **huge asset** to them and **understood the different uses** between scheduled video appointments and on-demand.
- Most users thought this solution **solved the problem of clients having difficulty joining appointments**, but some still had concerns of the value with **limited functionality**.



Video Call Loading Screen



Outcomes & Next Steps

Outcomes

- Within the first month of implementation, **134,601** video calls set up **total, 33% increase** Year-Over-Year.
- **20% of video calls** made were **On-Demand**.
- **13% increase** in tax returns completed through use of **On-Demand Video**.

Next Steps

- Continue tracking metrics of video appointment usage.
- Research, ideate, and test solutions for Phase 2 client verification.
- Future - Meet with MyBlock team to discuss improvement of client identity verification flow.

Thank You!

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