

Research Findings

Wireless - Postpaid

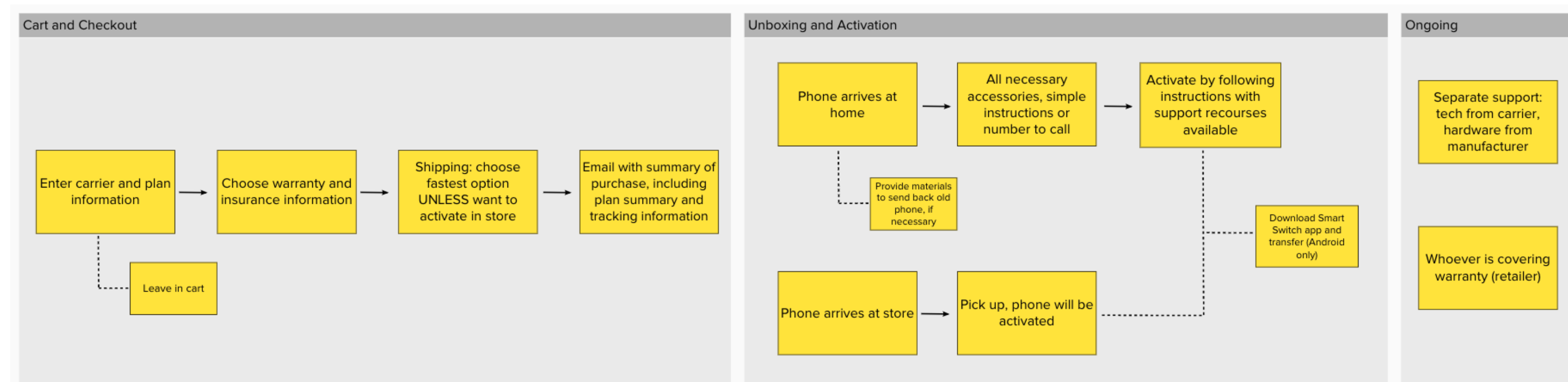
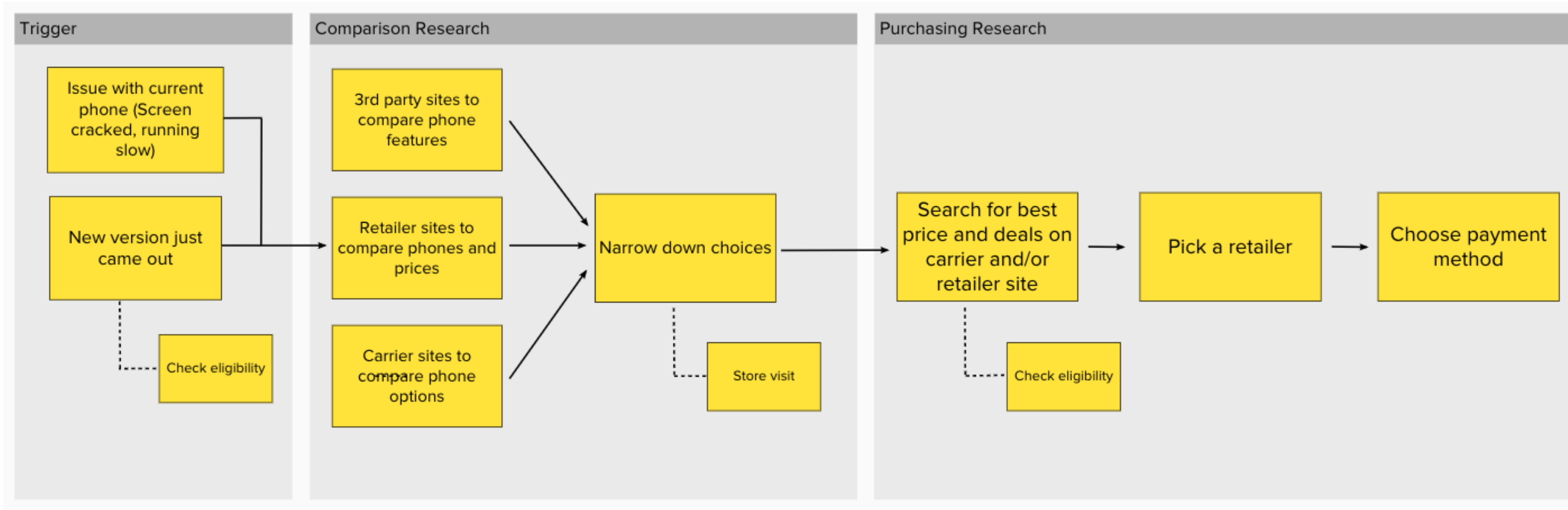
Executive Summary

Wireless- Postpaid

Background

15 participants currently looking to upgrade their phone in a remote, moderated study to determine the **ideal journey** and **decision tree** for someone buying a new phone from a retailer.

The Ideal Journey



----- Not all participants

Decision Tree- Process

1. iOS or Android *

2. Payment method (buy outright or financing)*

3. Phone features

4. Price willing to spend

5. Change phone plan

6. Installment plan option

7. Warranty

8. Shipping method *

*often predetermined

Decision Tree- Phone Features

1. Processor

2. Storage

3. RAM

4. Dimensions

5. Resolution

6. Megapixels

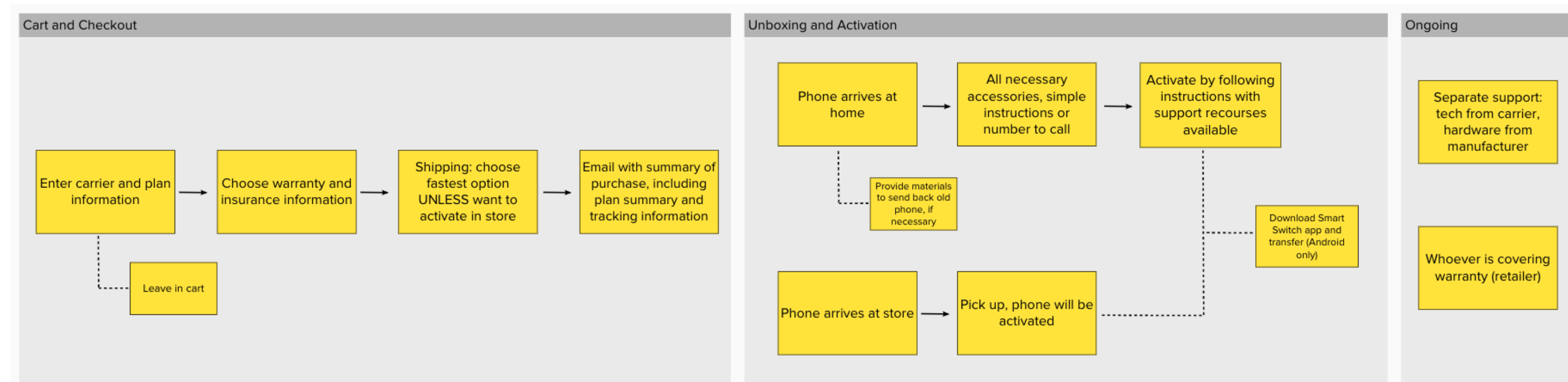
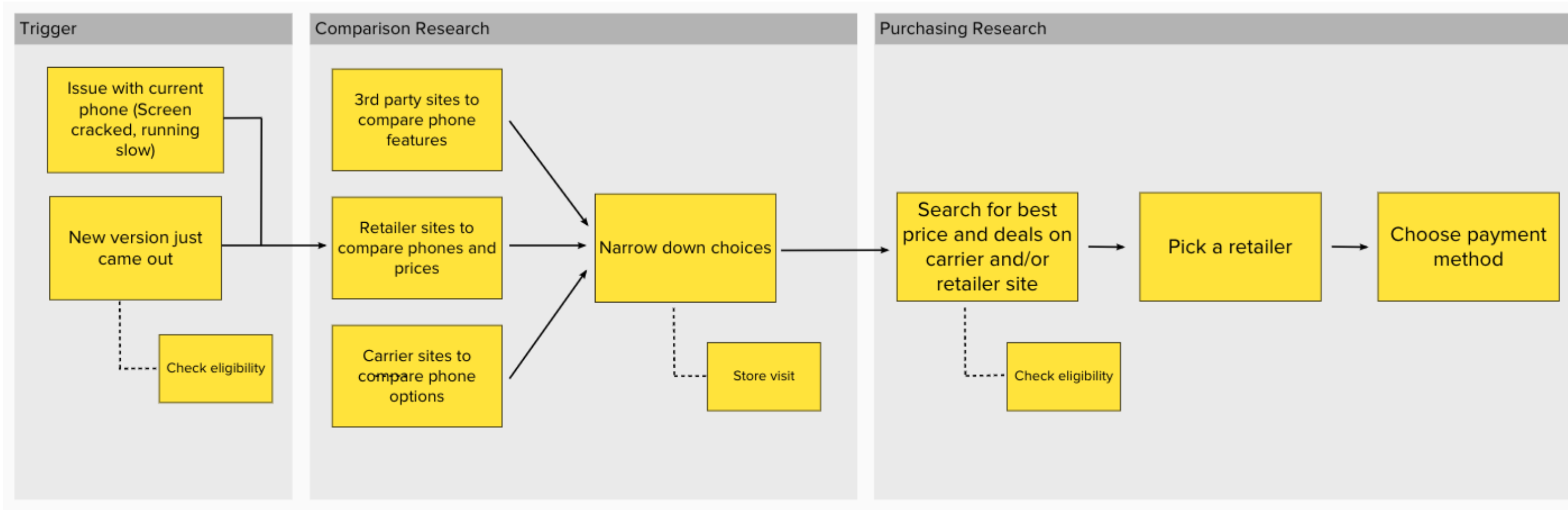
Findings

Wireless- Postpaid

Background

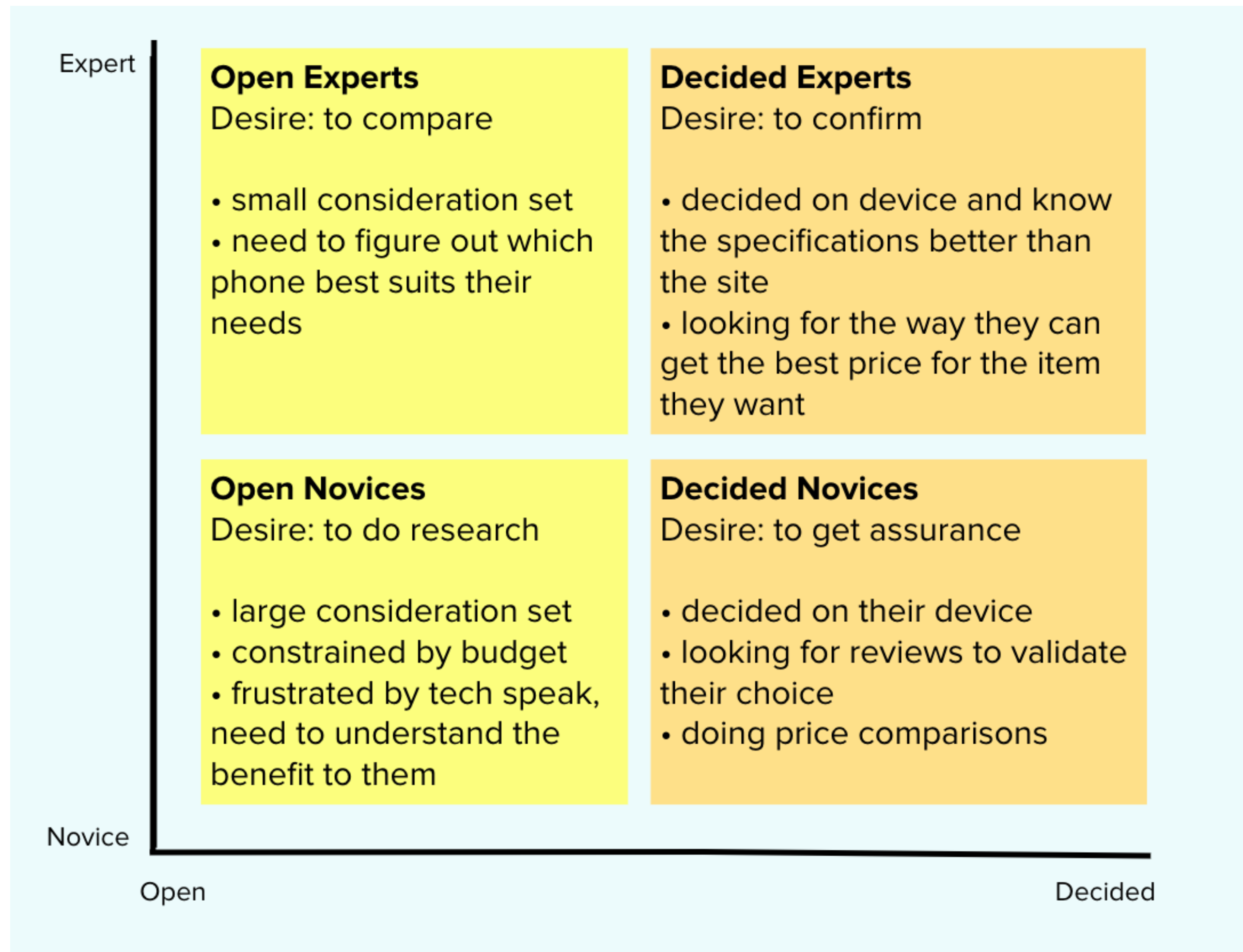
15 participants currently looking to upgrade their phone in a remote, moderated study to determine the **ideal journey** and **decision tree** for someone buying a new phone from a retailer.

The Ideal Journey



----- Not all participants

Types of Shoppers



- Sample contained all 4 types of shoppers (primarily Open Experts).
- Some differences in actions and preferences dependent on shopper type emerged.

Decision Tree- Process

1. iOS or Android *

2. Payment method (buy outright or financing)*

3. Phone features

4. Price willing to spend

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Decision Tree- Phone Features

1. Processor

2. Storage

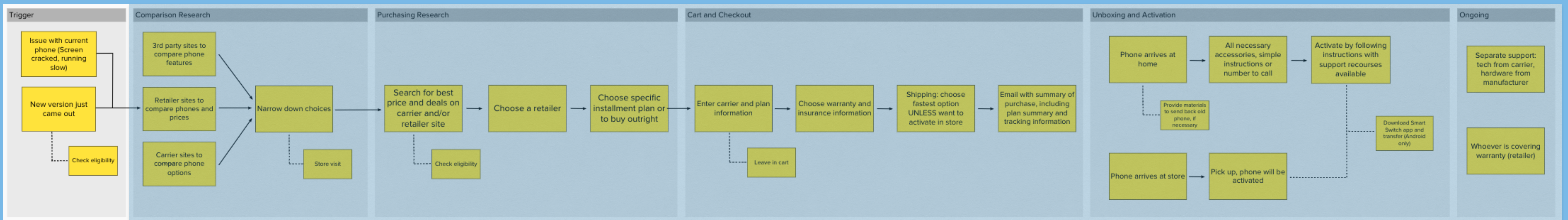
3. RAM

4. Dimensions

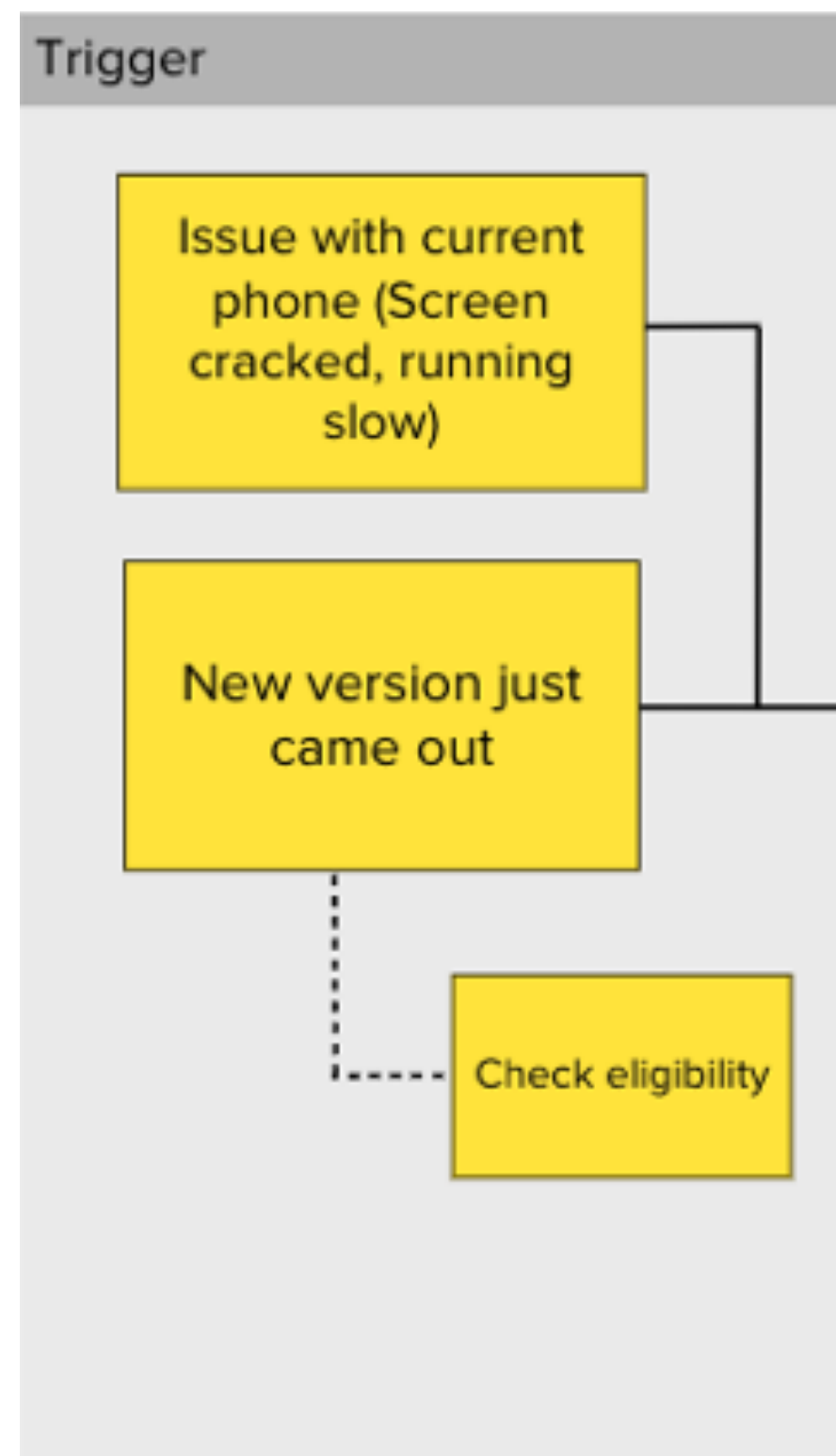
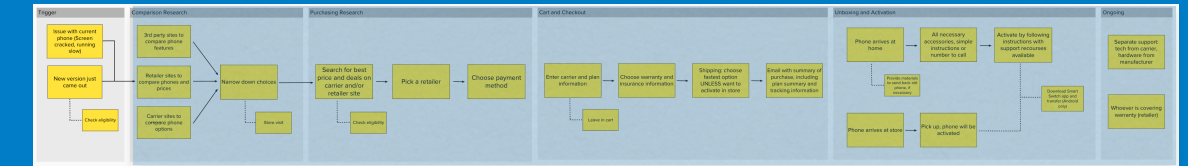
5. Resolution

6. Megapixels

Trigger

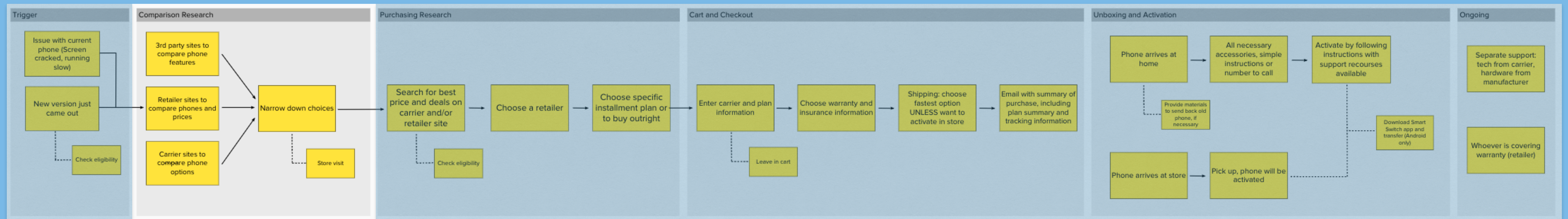


Trigger

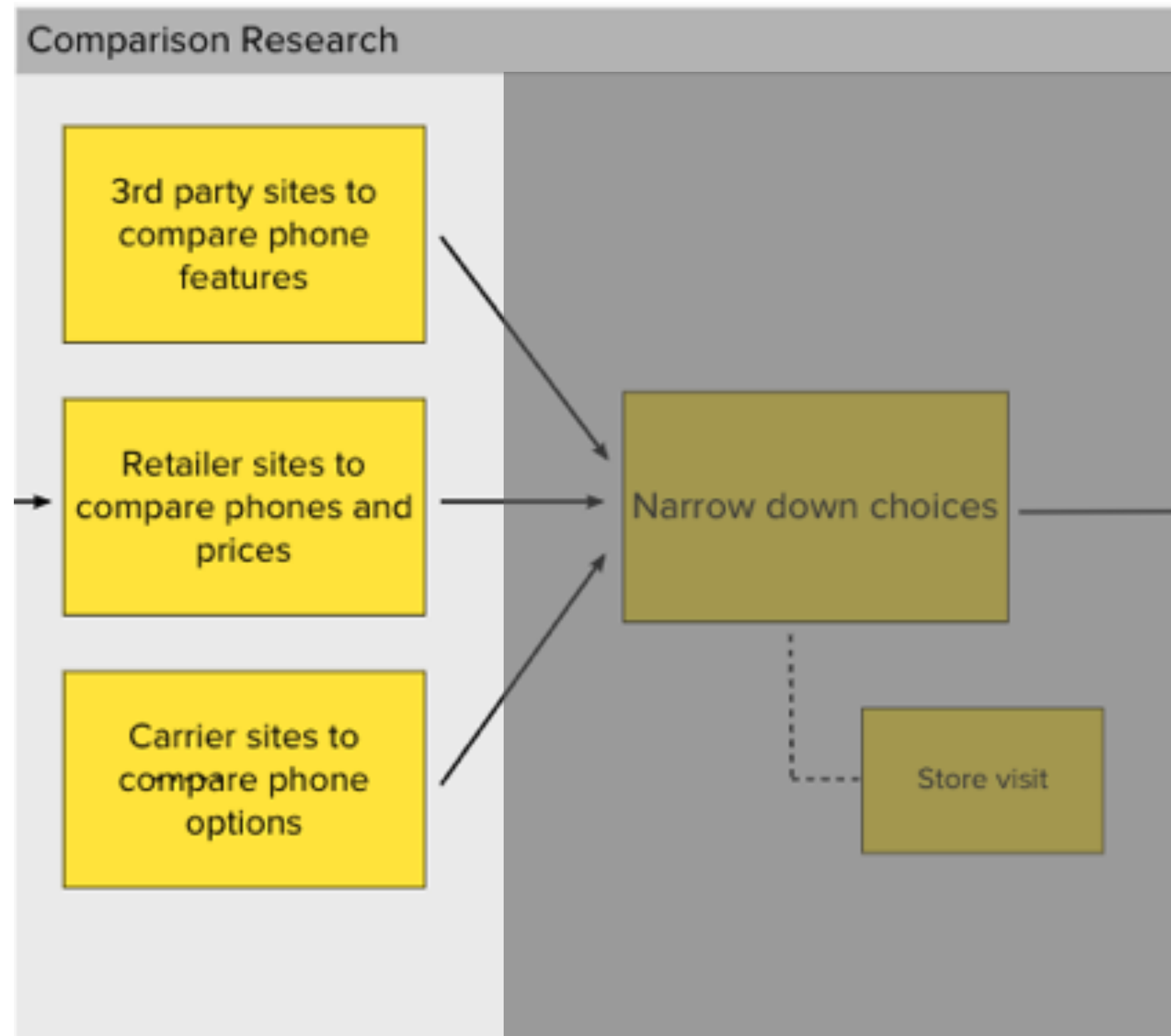
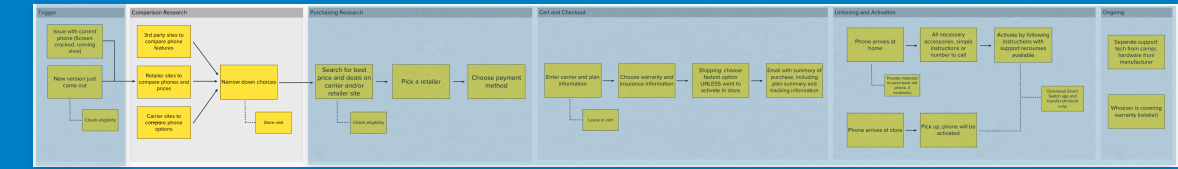


- Participants at this stage usually know which operating system they are looking for.
- Participants with a current phone issue (cracked screen, slowing down) are more open to different brands than those looking to upgrade to the newest version.
- iPhone participants are more likely to check their upgrade eligibility during this phase than Android participants.
- Decided Experts most likely to predetermine to buy phone outright; these participants are not considering plan changes or installment options.
- **Decisions Made:** iOS vs. Android, brand, payment method (buy phone outright or payment plan), phone plan

Comparison Research

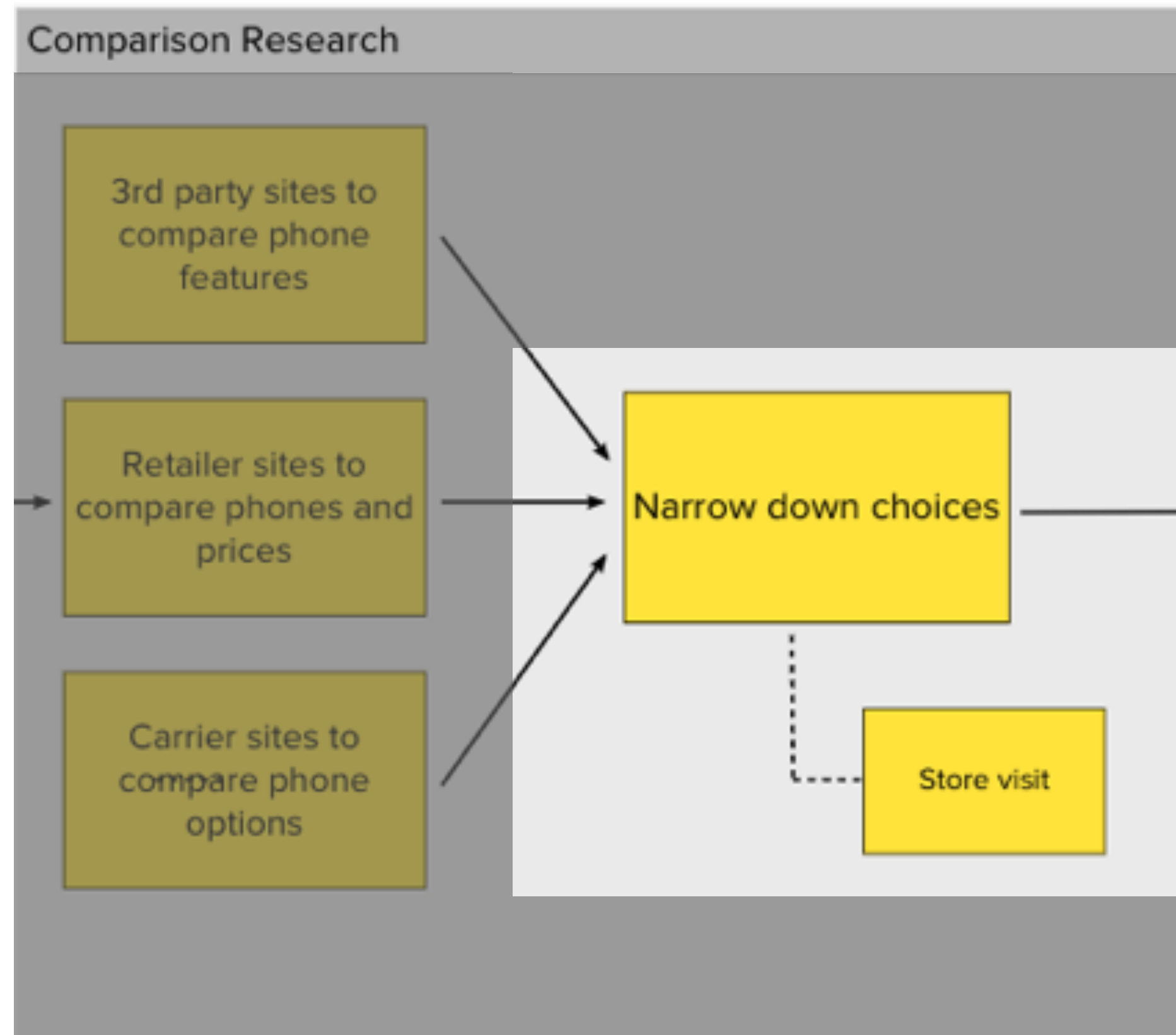
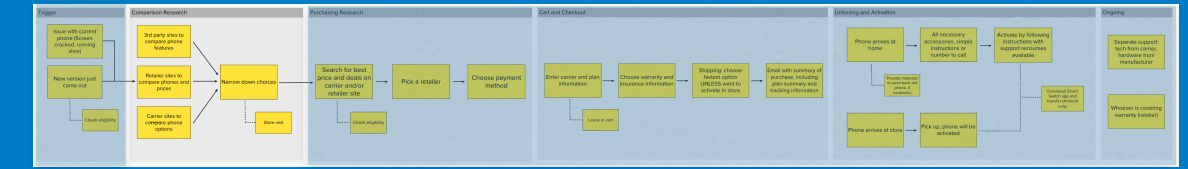


Comparison Research



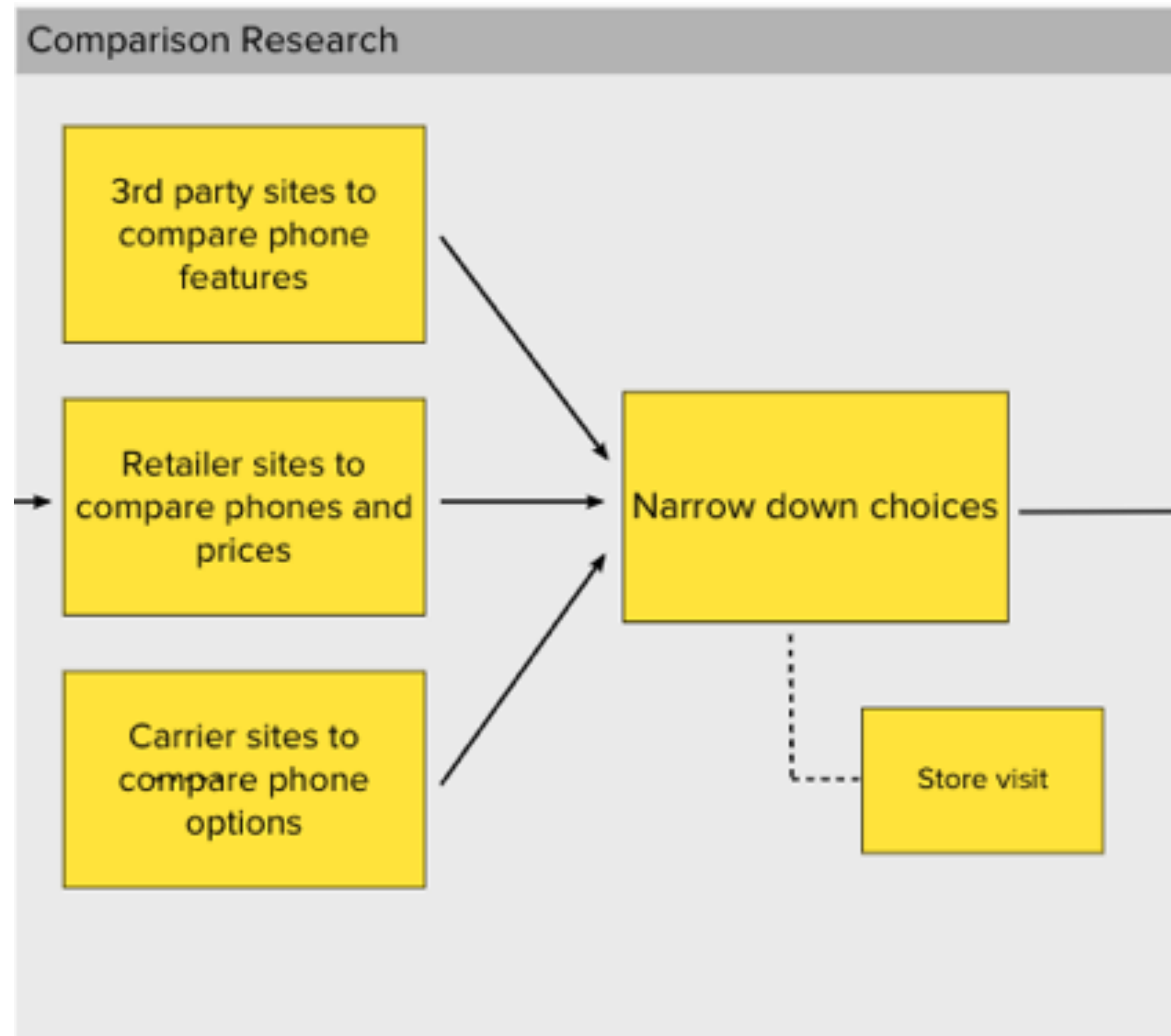
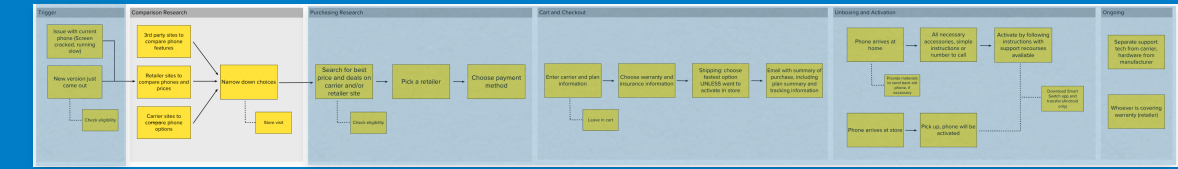
- Participants start researching online to compare current phone to newer versions, using all three types of sites.
- Experts usually start on 3rd party sites and weigh this information from 3rd party sites more heavily.
- Novices use 3rd party sites to validate retailer and carrier information.
- Participants need to understand how features translate to their individual needs.
 - For example, how does RAM effect battery life? Does the resolution mean better performance in bright sunlight?

Comparison Research



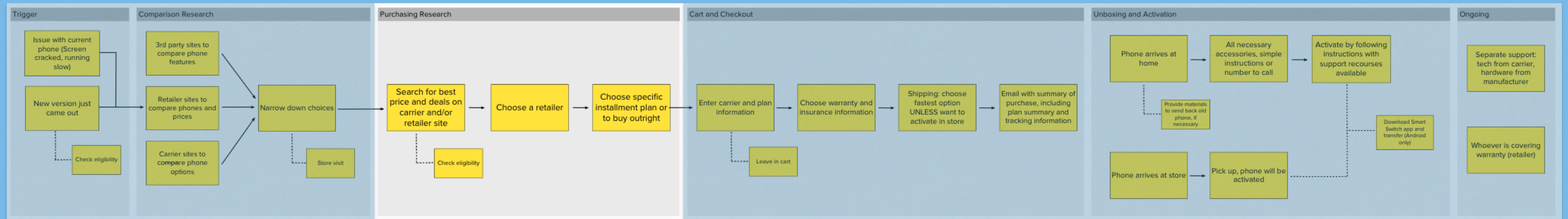
- Participants narrow down their choices to 2-3 and compare these to each other.
- Participants decide if the upgrade is “worth it”: if the newer version will meet their needs enough to justify the price.
- Some participants do a store visit to feel the phone in their hands.
 - Personal preference dictates if this is a necessary step.
 - Participants assume a person helping them in store will help them find the best pricing.
- **Decisions made:** Brand, price willing to spend, phone selection.

Comparison Research: Opportunities

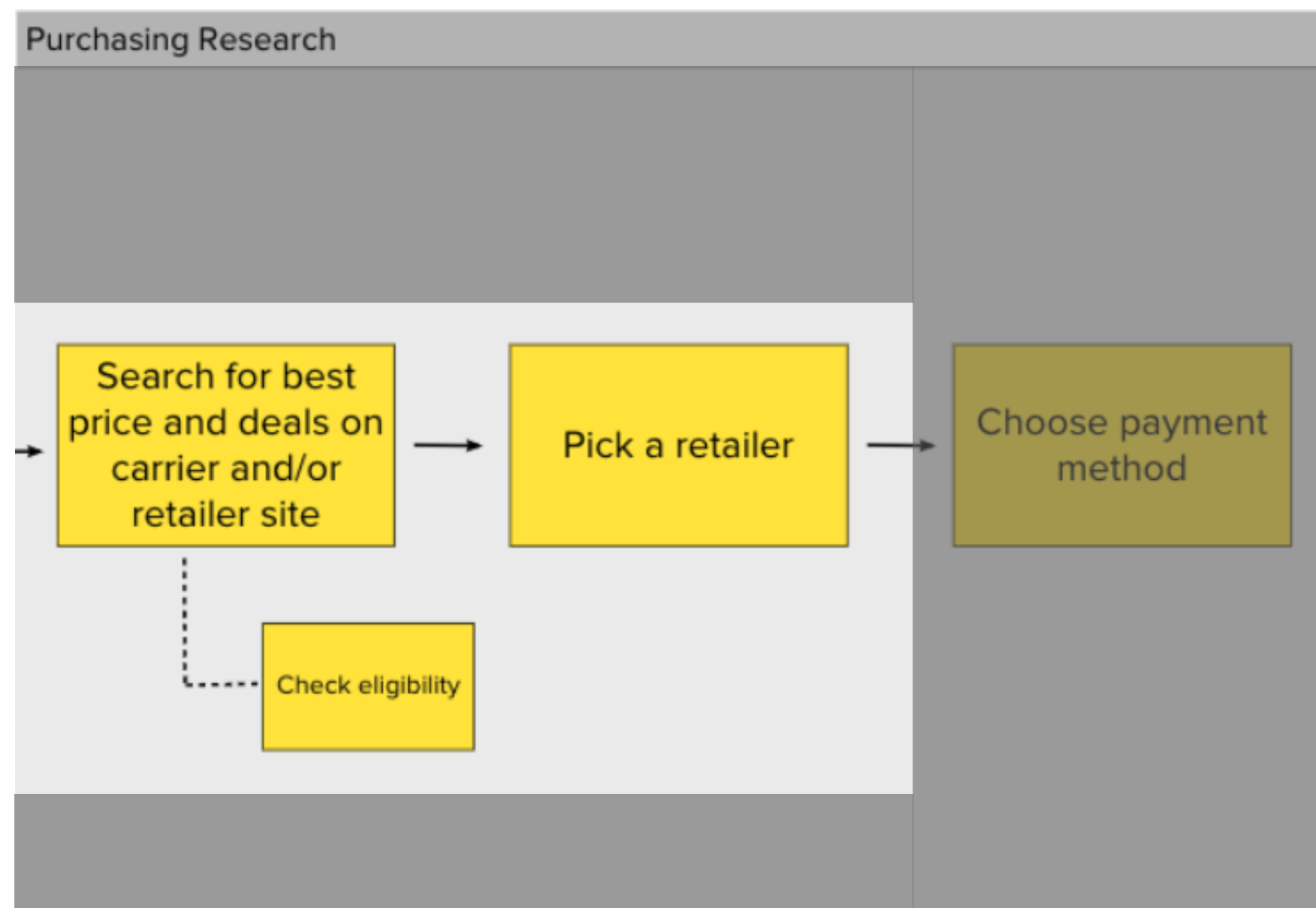
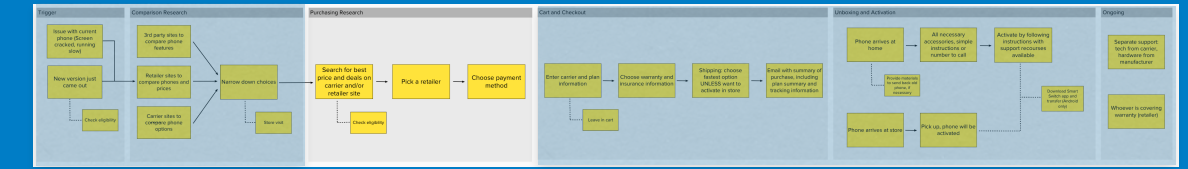


- How might we help customers compare their current phone to phones they are considering?
- How might we help translate phone features into layman terms and what that means for customers' day-to-day?
- How might we provide customers with “expert” guidance?
- How might we help customers compare features side-by-side and realistically?

Purchasing Research

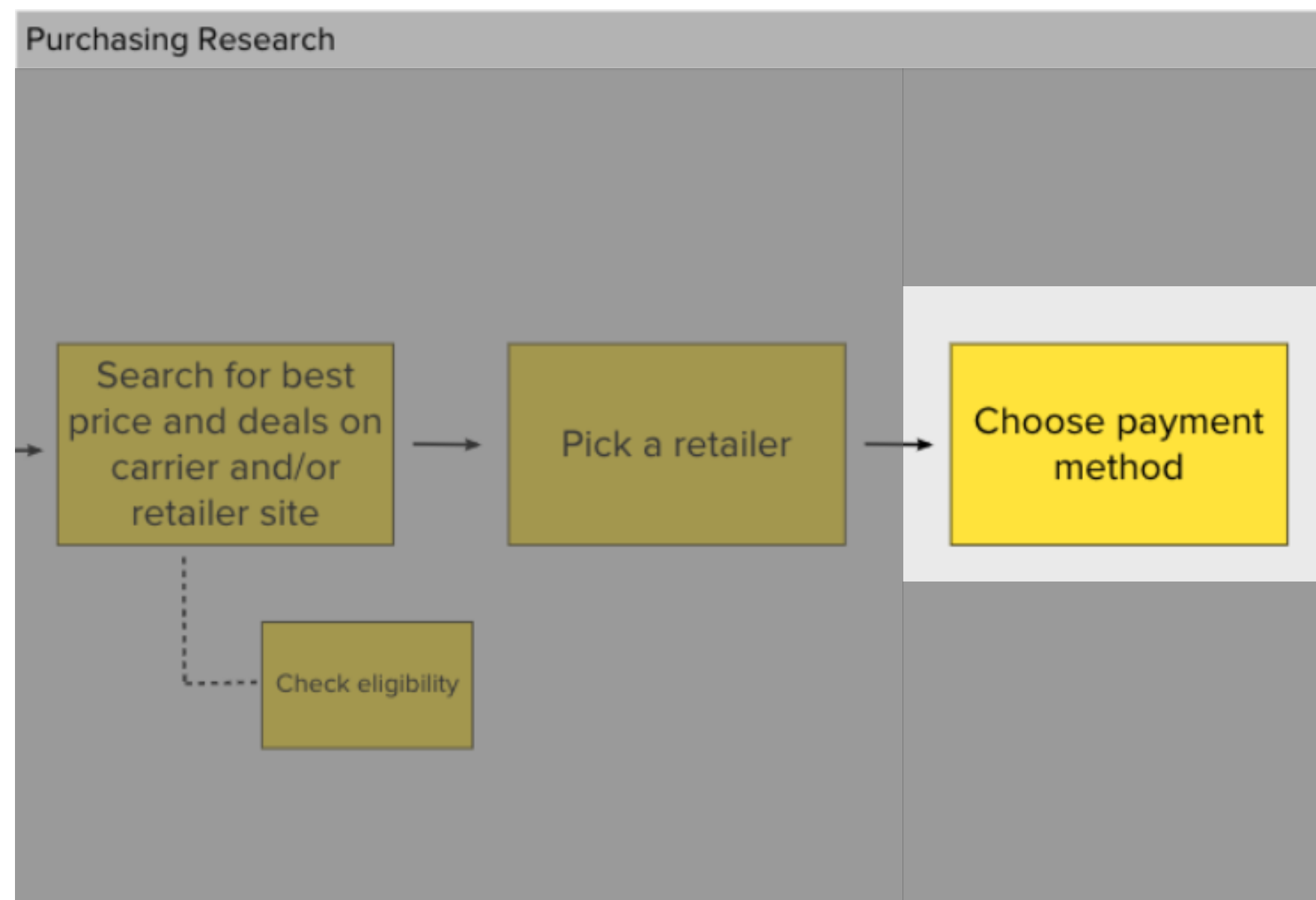
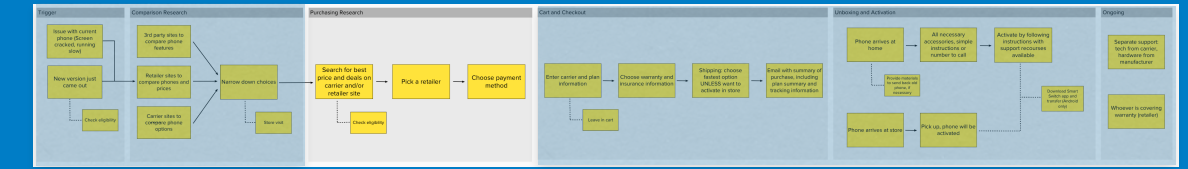


Purchasing Research



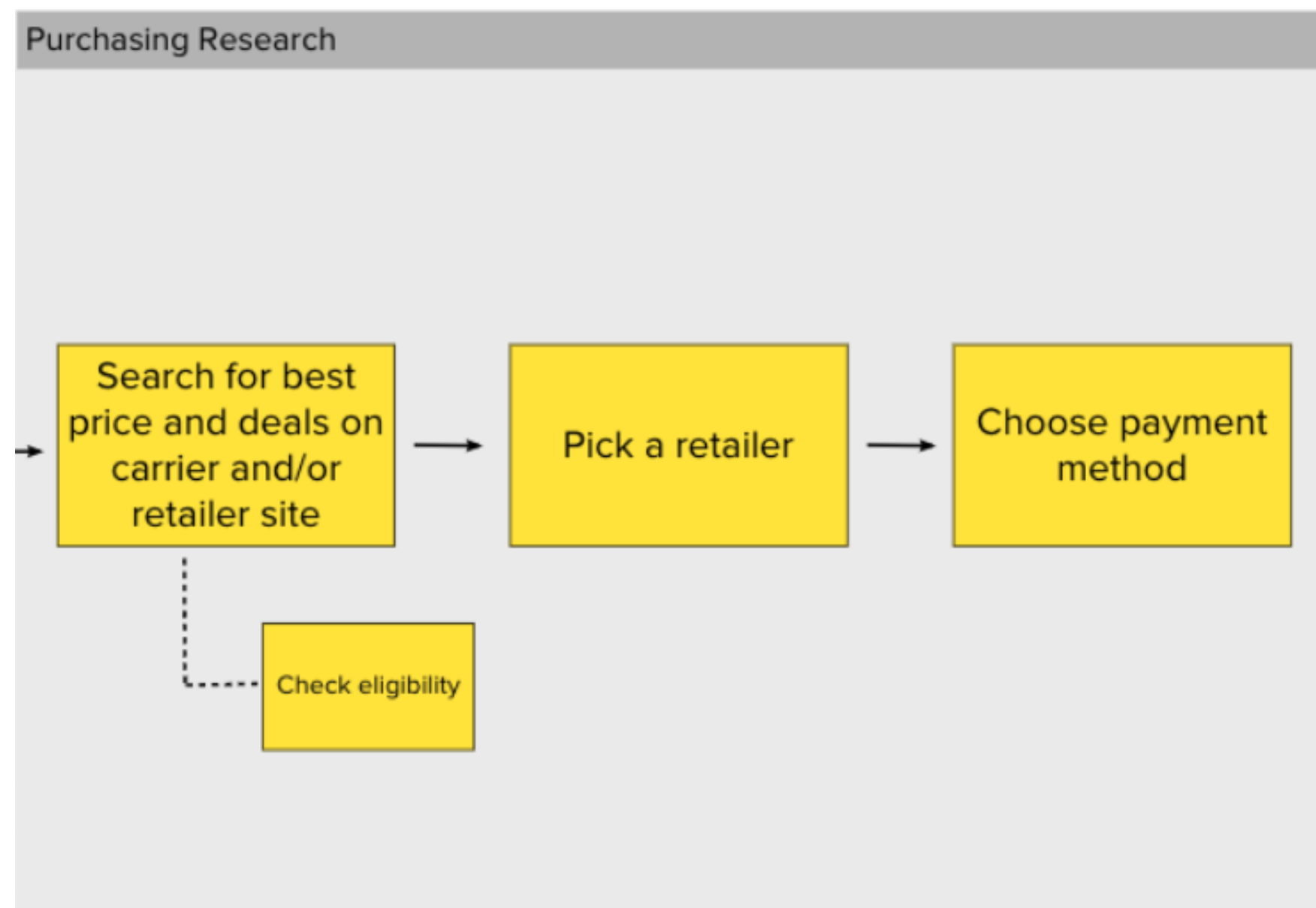
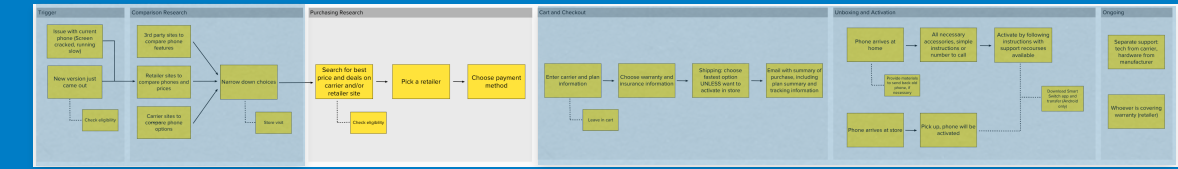
- Participants search retailer websites for the best pricing deals on their narrowed down choices.
- Participants using financing will check their eligibility with their carrier when comparing to deals to understand the true price of the phone.
- Participants choose a retailer based on best price (including incentive plans, discounts, etc.)
- **Decisions made:** Where to purchase, final phone selection.

Purchasing Research



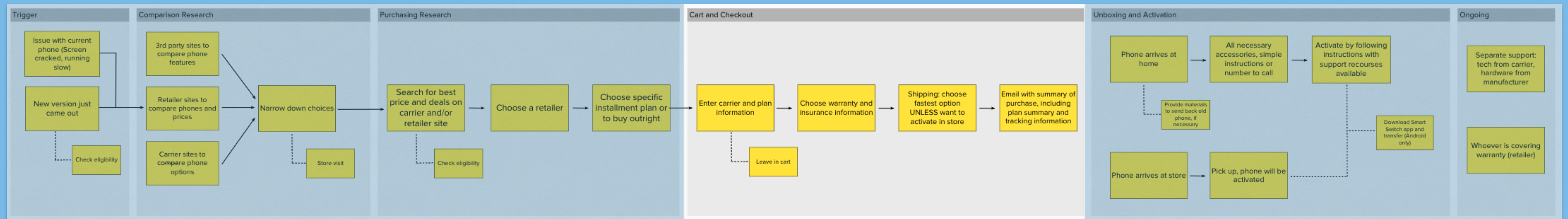
- Participants will do a final check and comparison of installment plans across carrier and retailer sites to determine the best combination of options.
- Some participants decide to make changes to their plan with their carrier to get a better price.

Purchasing Research: Opportunities

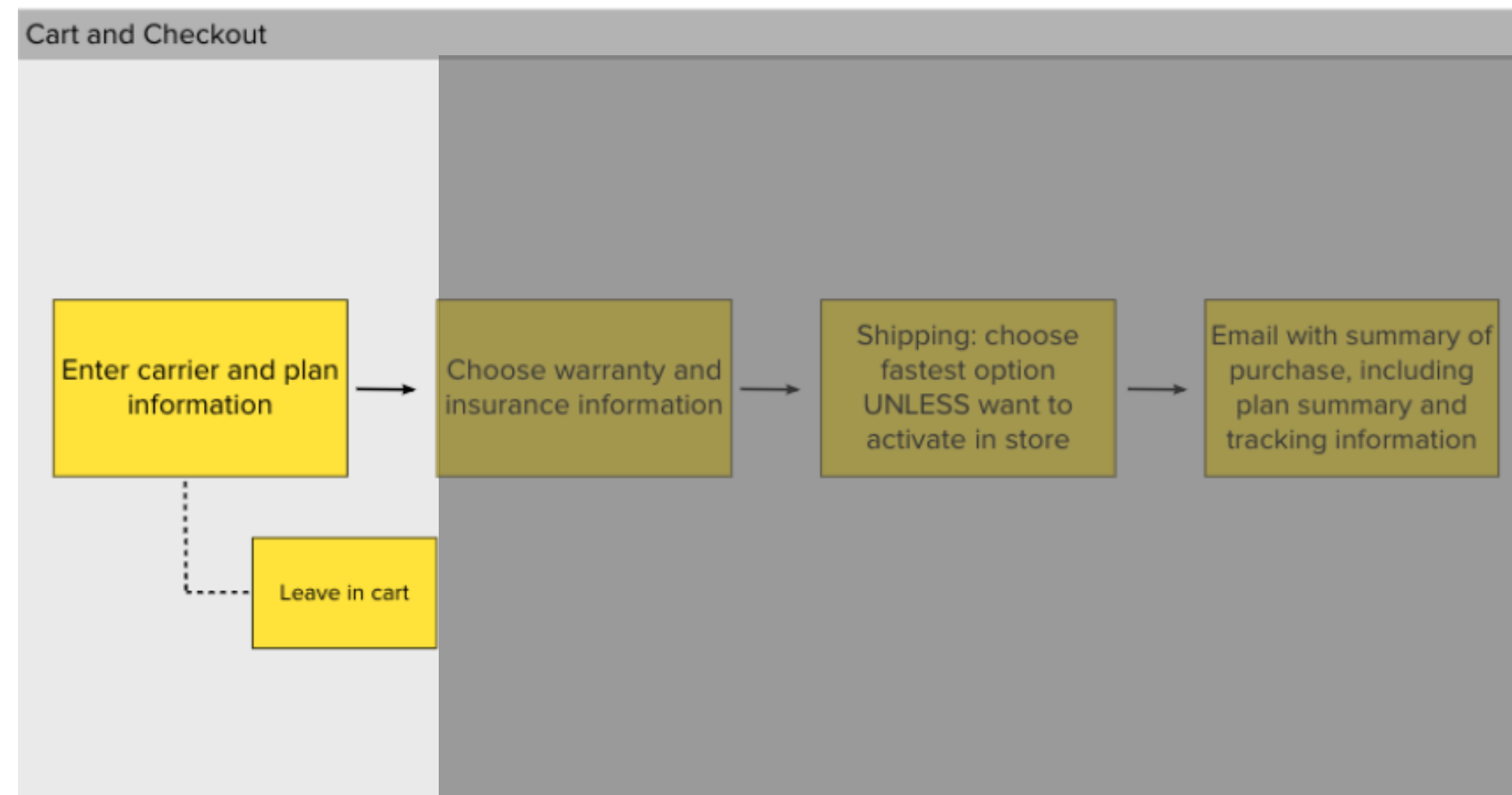
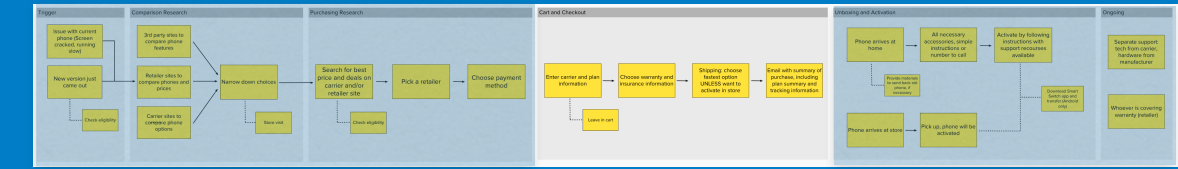


- How might we help customers compare phone prices (including upcoming discounts, sales, etc)?
- How do we help customers understand the we have the lowest price?
- How might we help customers understand the pros and cons of different installment plans?
- How might we help customers ask “experts” for guidance?

Cart & Checkout

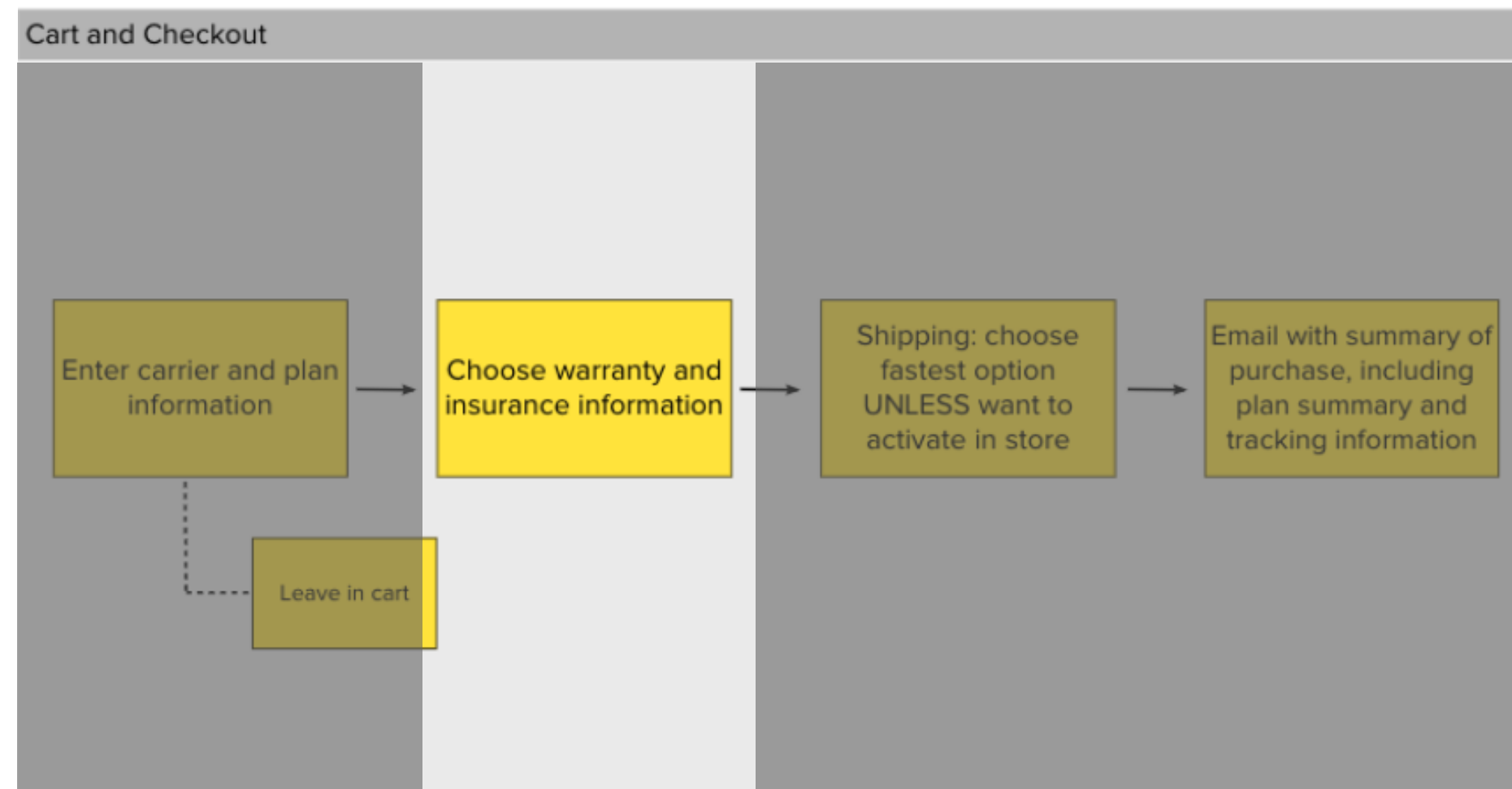
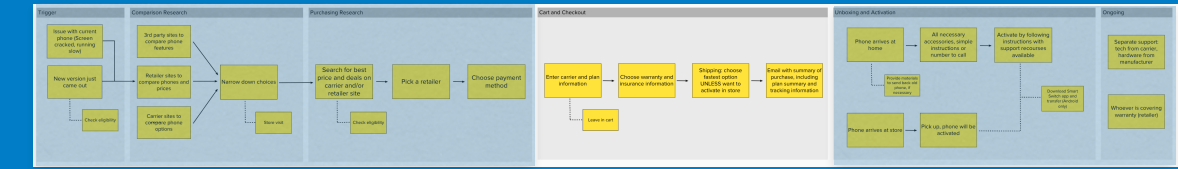


Cart & Checkout



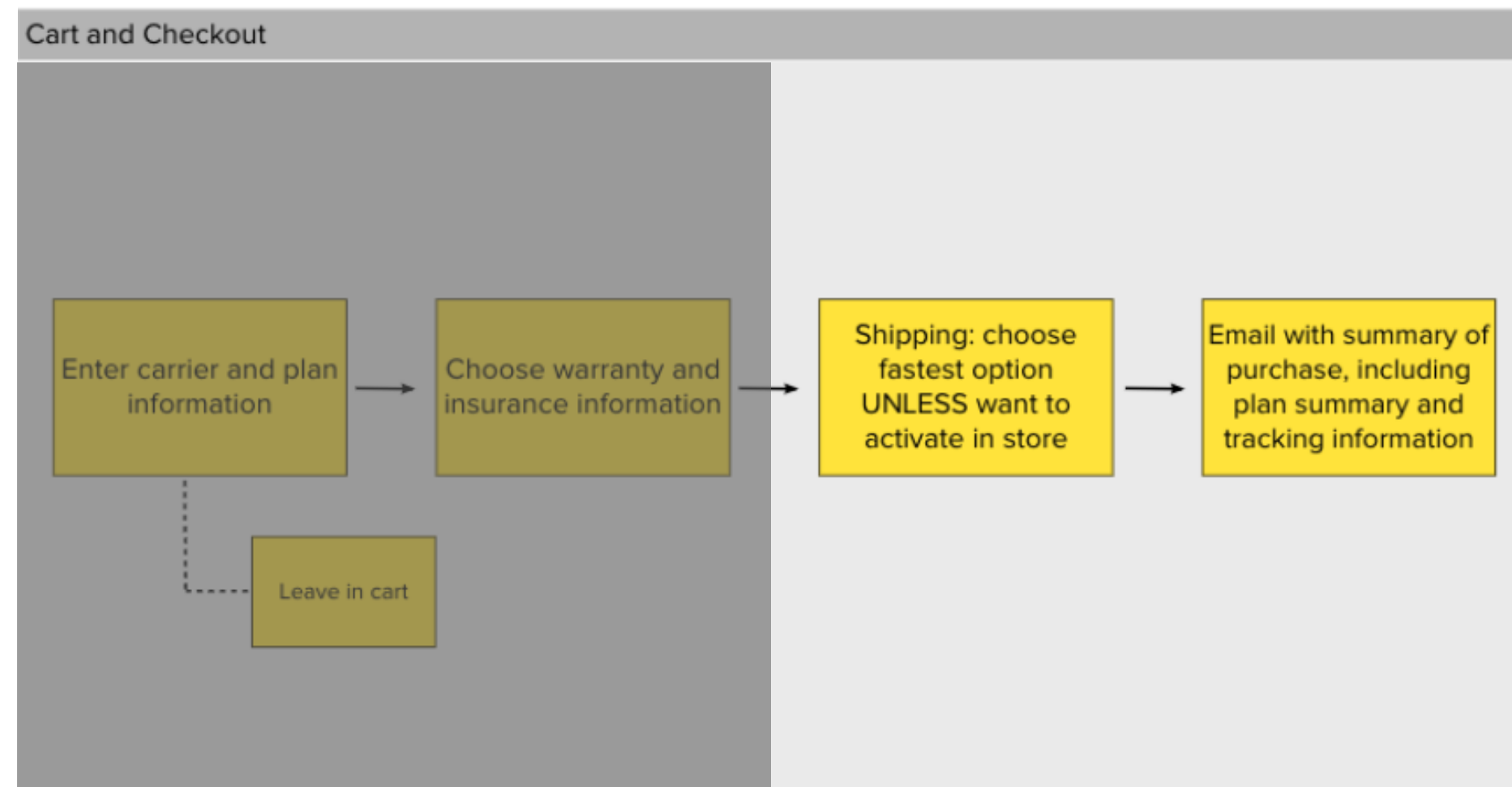
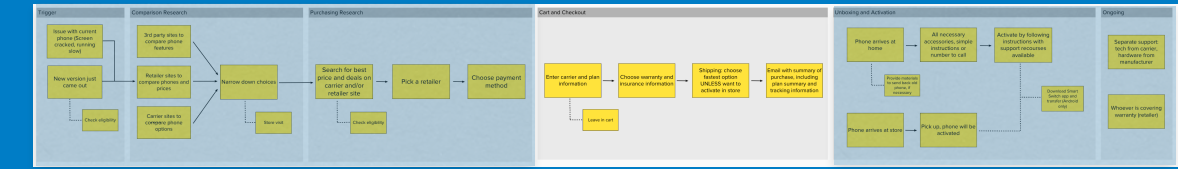
- Participants expect to enter their carrier information early in the add to cart process so that they can see a final price point.
- Some participants will leave a phone in cart to think about it.
- Participants want to be warned that they can only put one phone, or that their item will expire prior to adding to cart.

Cart & Checkout



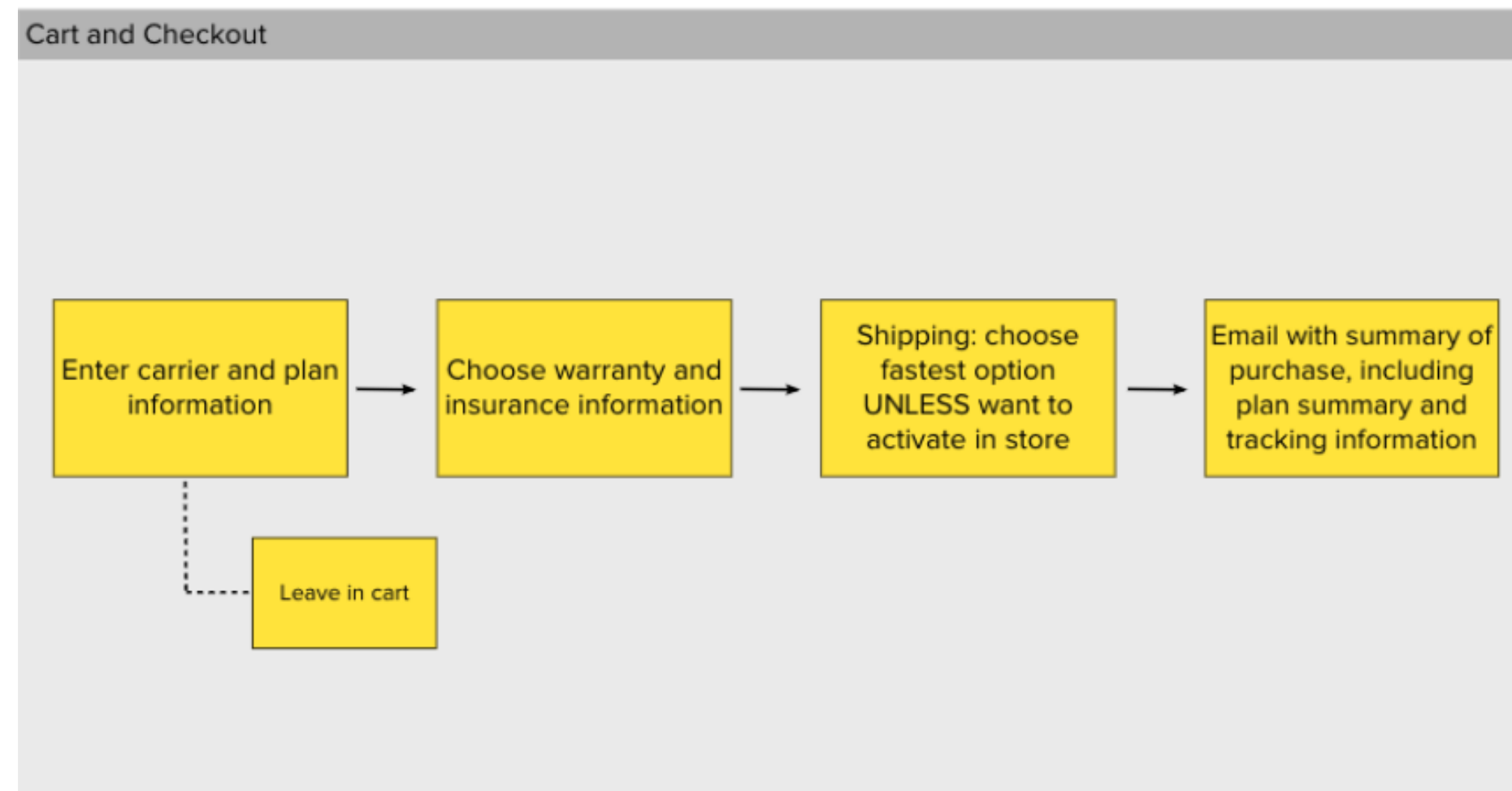
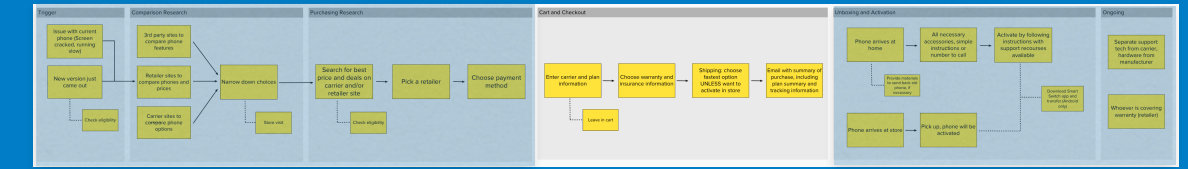
- Participants often did not bring up warranty until asked out it.
- Participants expect to be presented warranty plans during checkout and have their selected plan reflected in final pricing.
- Participants want clear explanations of what each warranty coverage.
- Participants seem to prefer retailer's warranty plan as they know it covers lost and stolen phones.

Cart & Checkout



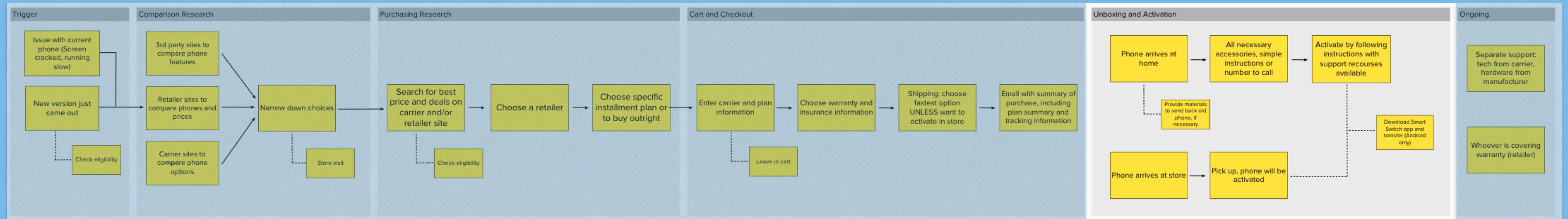
- Participants would chose the fastest shipping option, unless personal preference for PUT/ S2S.
- No strong trends for guest checkout; some concerned about forgetting login password.
- Participants want a single email post purchase. This email should include a plan summary, tracking information, and any other important information.

Cart & Checkout

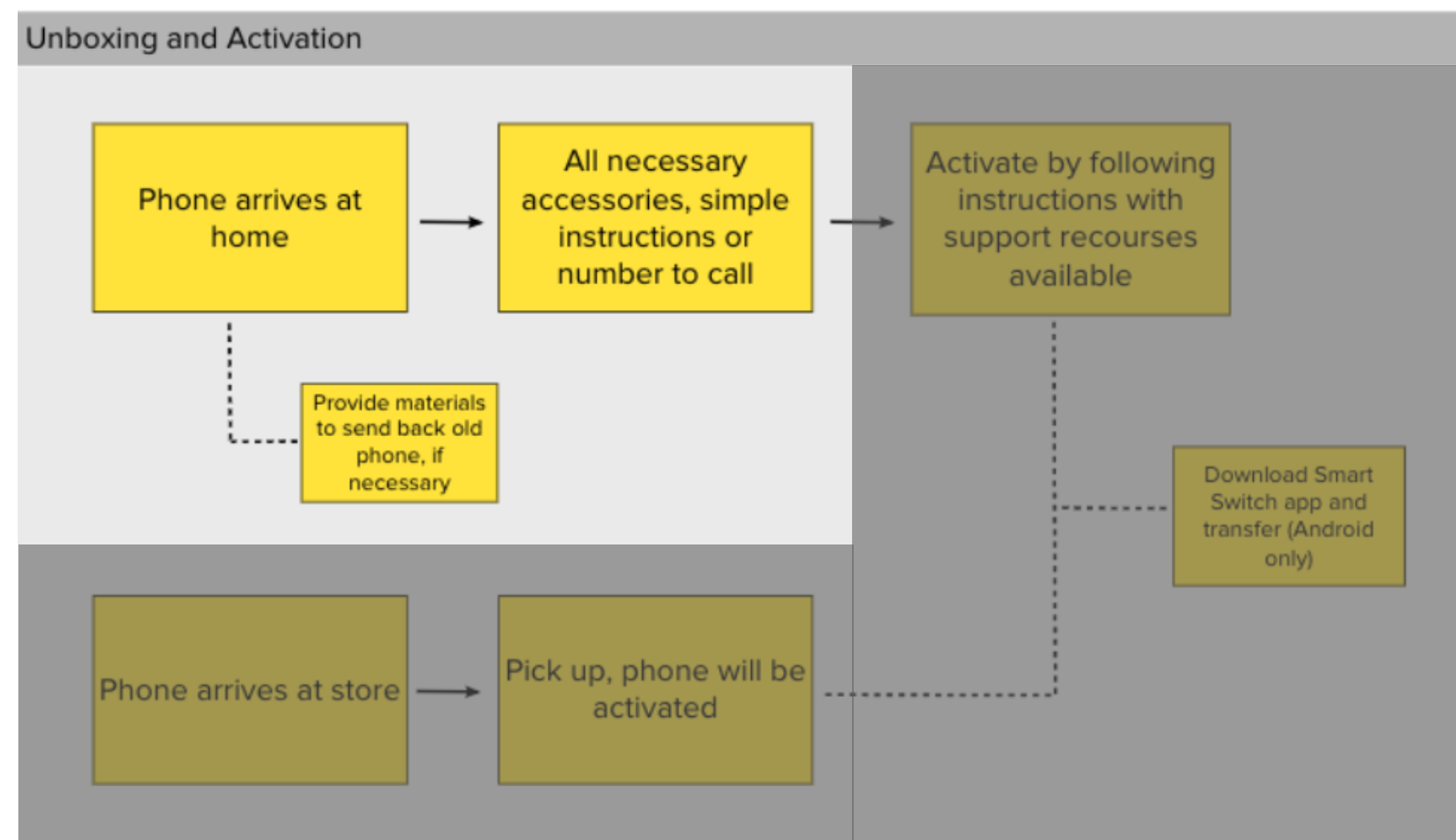
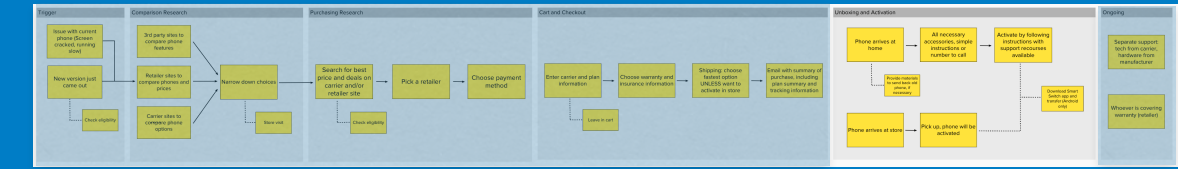


- How might we clearly explain warranty plans in a way where customers understand tradeoffs between price and aspects of the warranty?
 - Some participants indicated a comparison chart, similar to an insurance provider would be appreciated.
- How might we inform the customer that only one phone can be added to cart at any time?
- How might we simplify customers' lives by providing all information clearly and concisely in a single email?

Unboxing & Activation

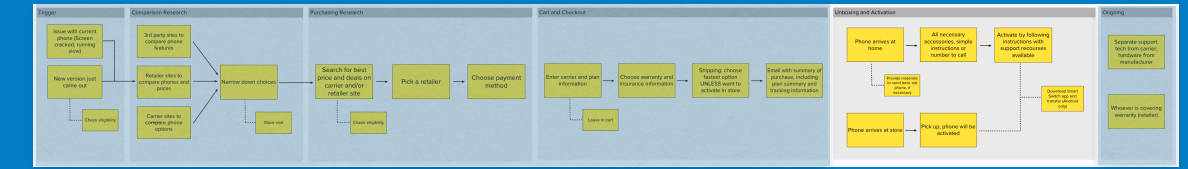


Unboxing: S2H

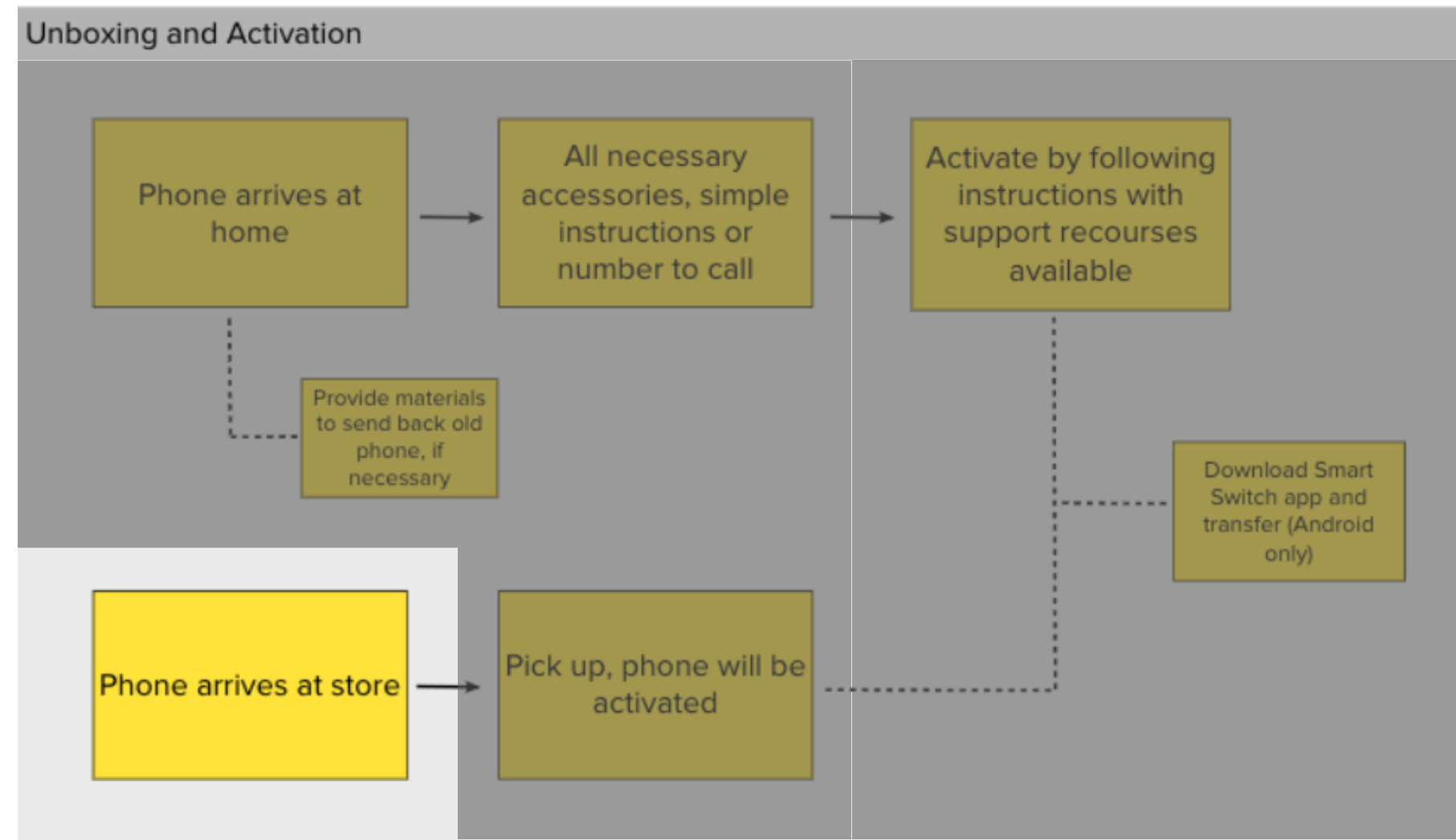


- Participants who choose S2H:
 - Expect all the accessories that come free with their phone in the box, including tool for SIM card installation.
 - Expect simple written instructions for SIM card installation and activation included in box.
- Participants who are trading in old phone would want shipping materials to come with new phone.

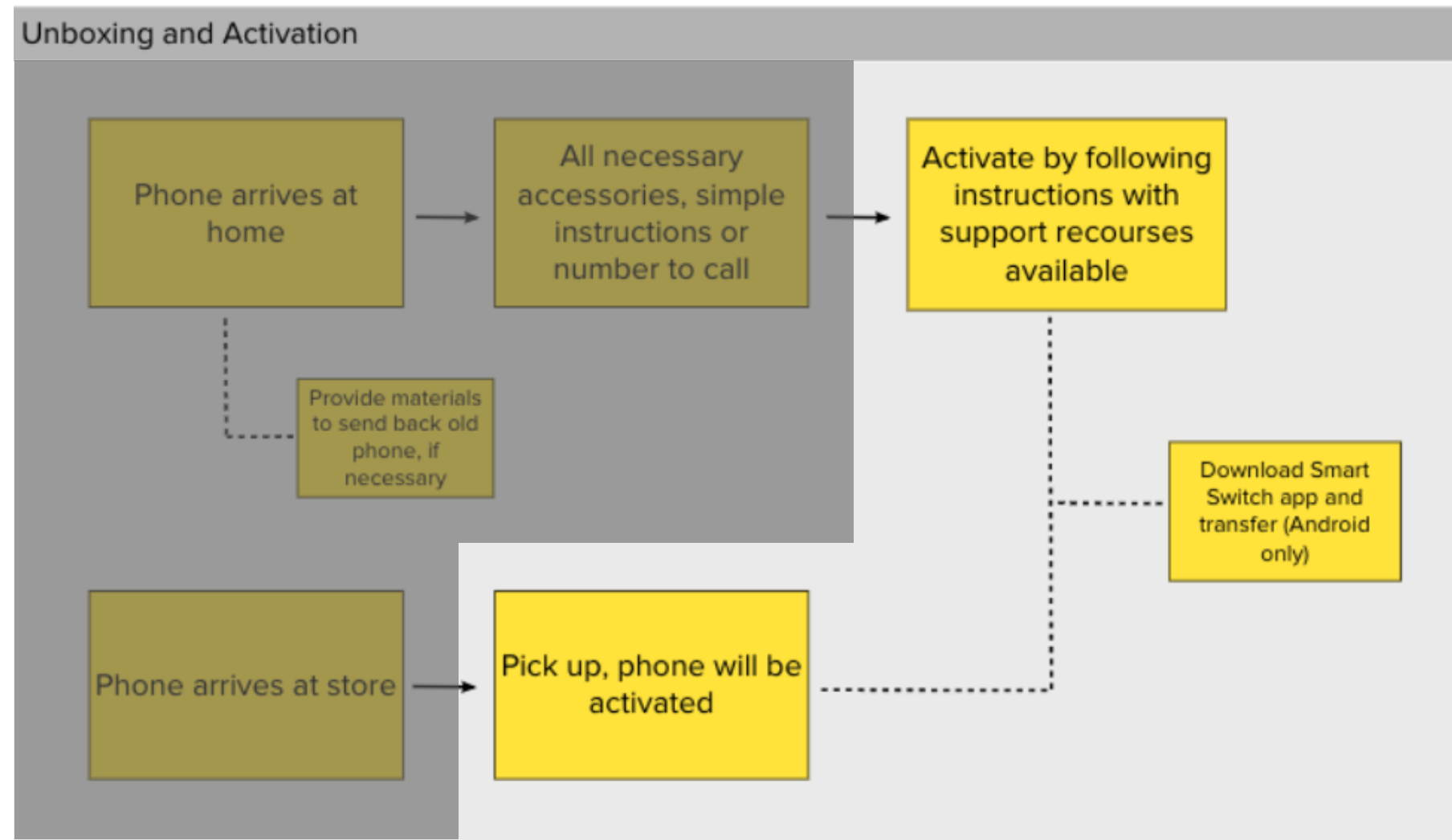
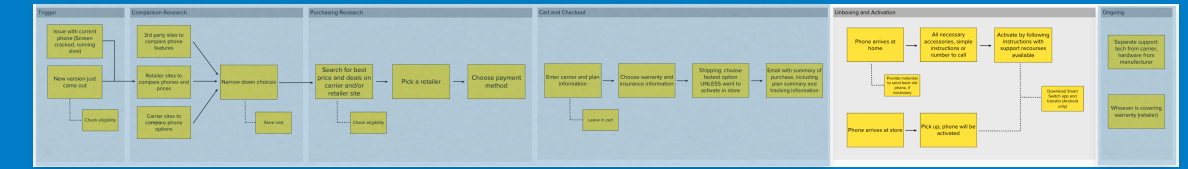
Unboxing: PUT/ S2S



- Participants who prefer PUT/S2S expect SIM card to be already installed when they pick up their phone.

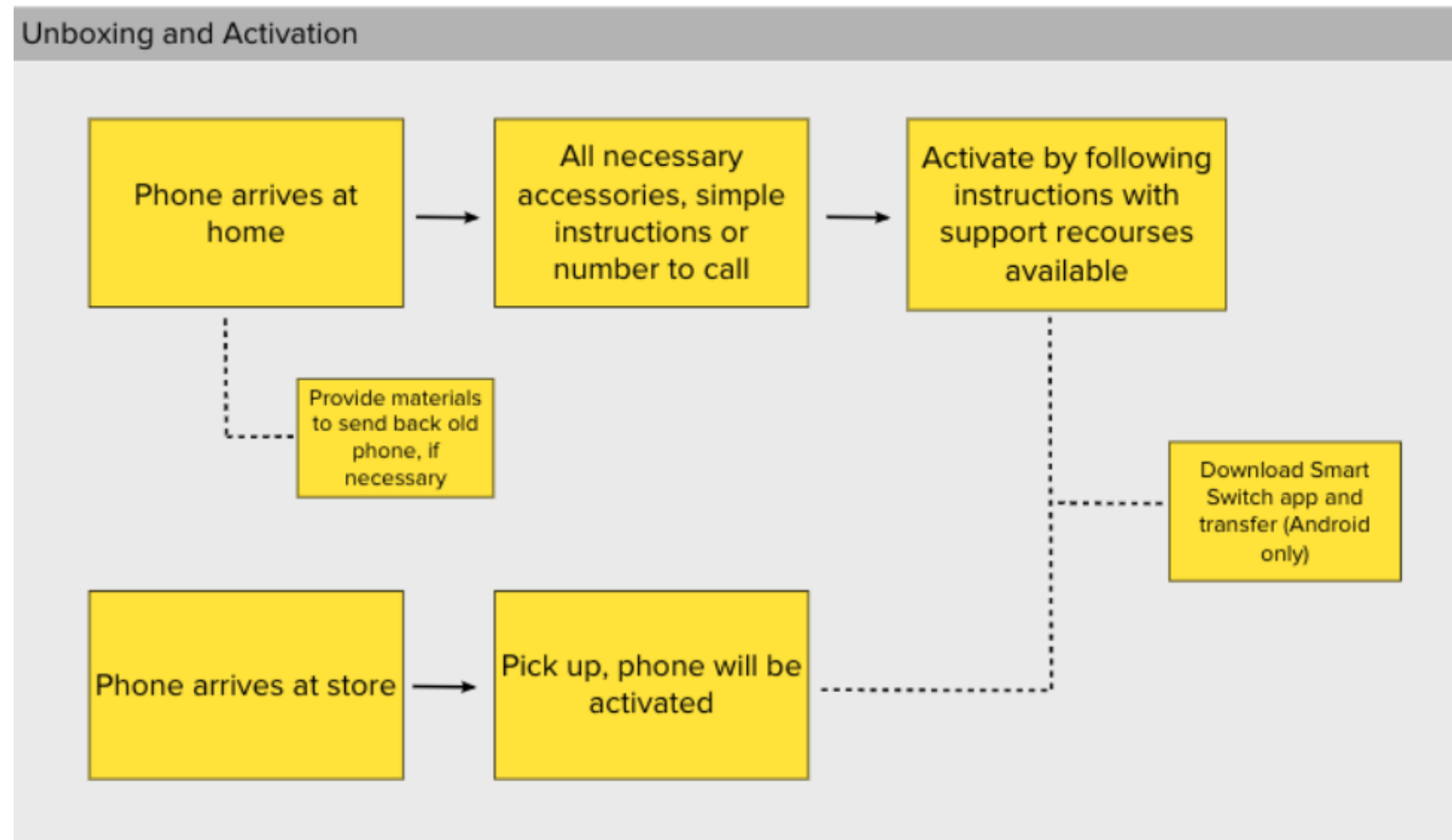
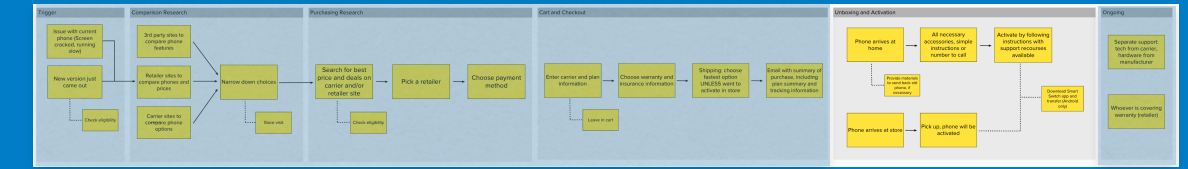


Activation



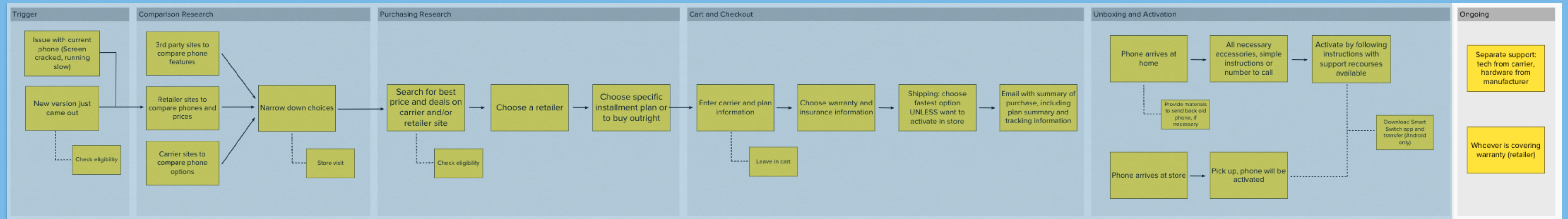
- Regardless of preferring PUT/S2S or S2H:
 - Participants want a number to call to directly have someone support with activation.
 - No strong trends for carrier vs. retailer; dependent on warranty coverage.
 - Participants want the phone already activated when they get it.
- Android participants want to be able to immediately download Smart Switch.

Activation: Opportunities

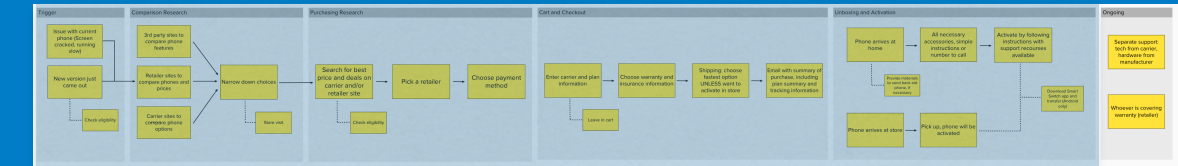


- How might we pre-activate phones for customers?
- How might we make the activation process extremely simple?
- How might we reduce wait time for PUT customers when they arrive to the store?
- How might we reassure customers that they will be able to easily contact support for their warranty provider?

Ongoing



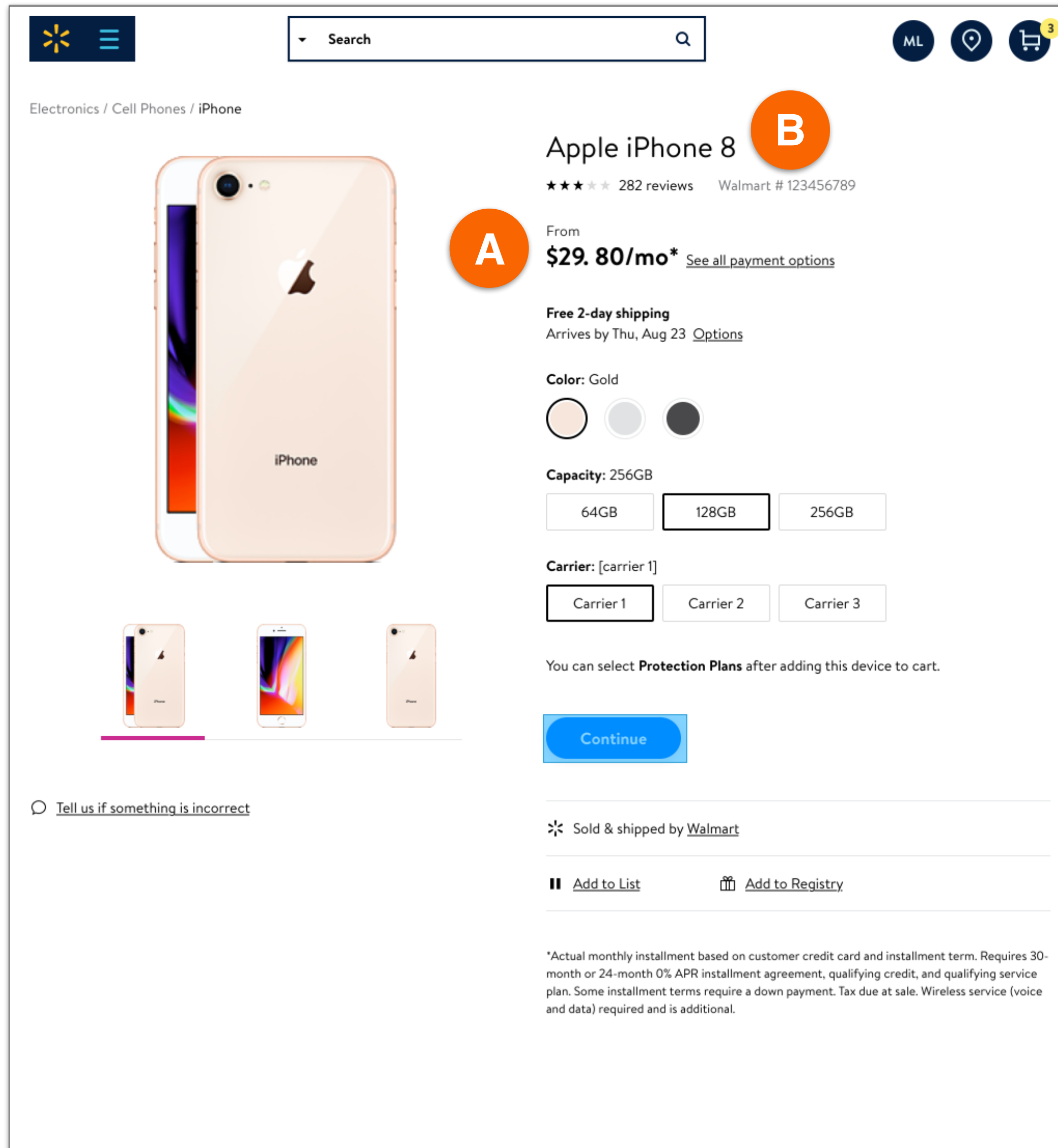
Ongoing



- Most participants expect ongoing support and maintenance to come from whoever is covering their warranty.
- Some participants expect separate support; tech support from carrier or hardware support from manufacturer

Suggestions for MVP

PDP Item Details



A

Price should include a range of what it might be, given eligibilities and other items that could change the price.

B

Provide separate PDPs for 8, 8+, etc.

PDP: Plan Overlay

Electronics / Cell Phones / iPhone

Apple iPhone 8

[Carrier 1] plan comparison

With Carrier 1, you can purchase your device using convenient monthly payments and trade up to a new phone in 24 or 30 months with eligible trade-in.

Estimated device payment options for the iPhone 6s Plus 4G LTE - Carrier 1*

	32 GB	128 GB	256 GB
Next - 30 monthly payments	\$25.67	\$29.00	\$32.33
Next Every Year - 24 monthly payments	\$32.08	\$37.25	\$32.33
Full Price	\$869.99	\$969.99	\$1069.99

*Carrier Plan: For smartphones only. Divides retail price into monthly installments. Requires 0% APR installment agreement and eligible service. Tax due at sale. Down payment option is available. \$0 Down: Requires 30 or 24-month carrier plan installment agreement & well-qualified credit. Service: eligible postpaid service (voice & data) is required and extra. If service is cancelled, remaining installment agreement balance is due. Activation/Upgrade Fee: \$20/line. No upgrade fee for line w/smartphone purchased on an installment agreement prior to 8/1/15. Waiver of fee subject to change. Restocking Fee: Up to \$35.

GENERAL WIRELESS SERVICE: Subject to Wireless Customer Agreement (att.com/wca). Services not for resale. Deposit: may be required. Device Limits: Purchase limits apply & prices vary by location. Credit approval, restocking and other fees, monthly, overage, other charges, usage, other restrictions per line apply. Pricing & terms subject to change & may be modified or terminated at any time without notice. Coverage and service not available everywhere. You get an off-net (roaming) usage allowance for each service. If you exceed the allowance, your services may be restricted or terminated. Other restrictions apply & may result in service termination.

Tell us if s

A

Again, price should show the full range of possibilities.

B

Emphasize “estimated pricing” is for the phone alone, not including coverage or service plan.

WARP: Carrier Sign in

Upgrade your device
Secure

[Return to product page](#)



Apple iPhone 6s Plus 4G LTE - [Carrier 1]
Space Gray, 128 GB
Qty: 1

\$200 Walmart gift card
with any activation on installment ⓘ

A

Let's get your upgrade started

- We'll contact [Carrier 1] to check your eligibility.
- You'll keep your existing phone number and plan.
- We'll ship you the phone for free!

[Carrier 1] account holder's information

Mobile Number

Password

[Cancel](#) [Continue](#)

Adding a new line

You can reserve your phone now and we'll take care of you in the store.

[Reserve](#)

© Walmart Stores, Inc.

A

Should clarify what password is being requested (Walmart? ATT? Apple?)

A

Provide a way to request forgotten password.

WARP: Choose your line

Upgrade your device
Secure

Return to product page



Apple iPhone 6s Plus 4G LTE - [Carrier 1]
Space Gray, 128 GB
Qty: 1

\$200 Walmart gift card
with any activation on installment ⓘ

A

Hi Samantha, you're eligible for device payment pricing*

1 of 3

Choose your line

This will be the line you want to use the new phone with.

☒ (408) 555-1234
Eligible for upgrade

CancelContinue

*Actual monthly installment based on customer credit card and installment term. Requires 30-month or 24-month 0% APR installment agreement, qualifying credit, and qualifying service plan. Some installment terms require a down payment. Tax due at sale. Wireless service (voice and data) required and is additional.

Choose device payment options

Accept the contracts

© Walmart Stores, Inc.

A

Provide price range, if possible.

WARP: Choose from Multiple Lines

1 Choose your line

This will be the line you want to use the new phone with.

☐ (408) 555-1234
Eligible for upgrade

☒ (408) 555-5678
Upgrade with restrictions ⓘ

☐ (408) 555-9102
No upgrade available ⓘ

[Carrier 1] requires that a balance be paid
Please make your payment of \$299.99 to [Carrier 1] before you pick up
your phone.

Reserve your phone now and we'll help you in the store.

Cancel

Reserve

A

1 Choose your line

This will be the line you want to use the new phone with.

☐ (408) 555-1234
Eligible for upgrade

☒ (408) 555-5678
Upgrade with restrictions ⓘ

☐ (408) 555-9102
No upgrade available ⓘ

Reserve your phone now and we'll help you in the store.

Cancel

Reserve

C

1 Choose your line

This will be the line you want to use the new phone with.

☐ (408) 555-1234
Eligible for upgrade

☒ (408) 555-5678
Upgrade with restrictions ⓘ

☐ (408) 555-9102
No upgrade available ⓘ

[Carrier 1] requires that a balance be paid off
Contact [Carrier 1] to make your payment

Visit your carrier or see us in store so we may assist you.

Ok

B

1 Choose your line

This will be the line you want to use the new phone with.

☐ (408) 555-1234
Eligible for upgrade

☒ (408) 555-5678
Upgrade with restrictions ⓘ

☐ (408) 555-9102
No upgrade available ⓘ

Visit your local store for phone availability.

Ok

C

A

Unclear is this is an existing balance or towards the new phone.

B

Provide a link or contact information to the carrier.

C

Provide customers with more information here: What store is being referred to? The carrier? Walmart? Where is the closest store?

WARP: Cont.

Upgrade your device
Secure

[Return to product page](#)



Apple iPhone 6s Plus 4G LTE - [Carrier 1]
Space Gray, 128 GB
Qty: 1

\$200 Walmart gift card
with any activation on installment ⓘ

For your security, we've sent a verification code to (408) 555-1234

Verification Code

Enter your verification code here

Didn't receive a code? [Resend code](#)

[Cancel](#) [Continue](#)

For your security, we've sent a verification code to (408) 555-1234

Verification Code

Didn't receive a code? [Resend code](#)

[Cancel](#) [Continue](#)

© Walmart Stores, Inc.

A

Provide a backup to this verification.
The customer's current phone could be broken to the point of being unusable.

A

Similar to other steps in the process,
provide stats indication.

1 of 3



WARP: Choose Payment Plan



Upgrade

[Return to shopping](#)



Apple iPhone 6s Plus 4G LTE - [Carrier 1]
Space Gray, 128 GB
Qty: 1

\$200 Walmart gift card
with any activation on installment ⓘ

2 Choose device payment options*

☒ [Carrier 1] Plan 1
Trade in after 24 months
\$23.84/month for 30 months ⓘ

☐ [Carrier 1] Plan 2
Trade in after 24 months
\$23.84/month for 30 months ⓘ

☐ [Carrier 1] Plan 3
Trade in after 24 months
\$23.84/month for 30 months ⓘ

Cancel

Continue

*Actual monthly installment based on customer credit card and installment term. Requires 30-month or 24-month 0% APR installment agreement, qualifying credit, and qualifying service plan. Some installment terms require a down payment. Tax due at sale. Wireless service (voice and data) required and is additional.

Hi Samantha, you're eligible for device payment pricing*

✓ Choose your line (408) 555-1234 [Change](#)

2 Choose device payment options*

☐ [Carrier 1] Plan 1
Trade in after 24 months
\$23.84/month for 30 months ⓘ

☐ [Carrier 1] Plan 2
Trade in after 24 months
\$23.84/month for 30 months ⓘ

☐ [Carrier 1] Plan 3
Trade in after 24 months
\$23.84/month for 30 months ⓘ

Cancel

Continue

*Actual monthly installment based on customer credit card and installment term. Requires 30-month or 24-month 0% APR installment agreement, qualifying credit, and qualifying service plan. Some installment terms require a down payment. Tax due at sale. Wireless service (voice and data) required and is additional.

3 Accept the contracts

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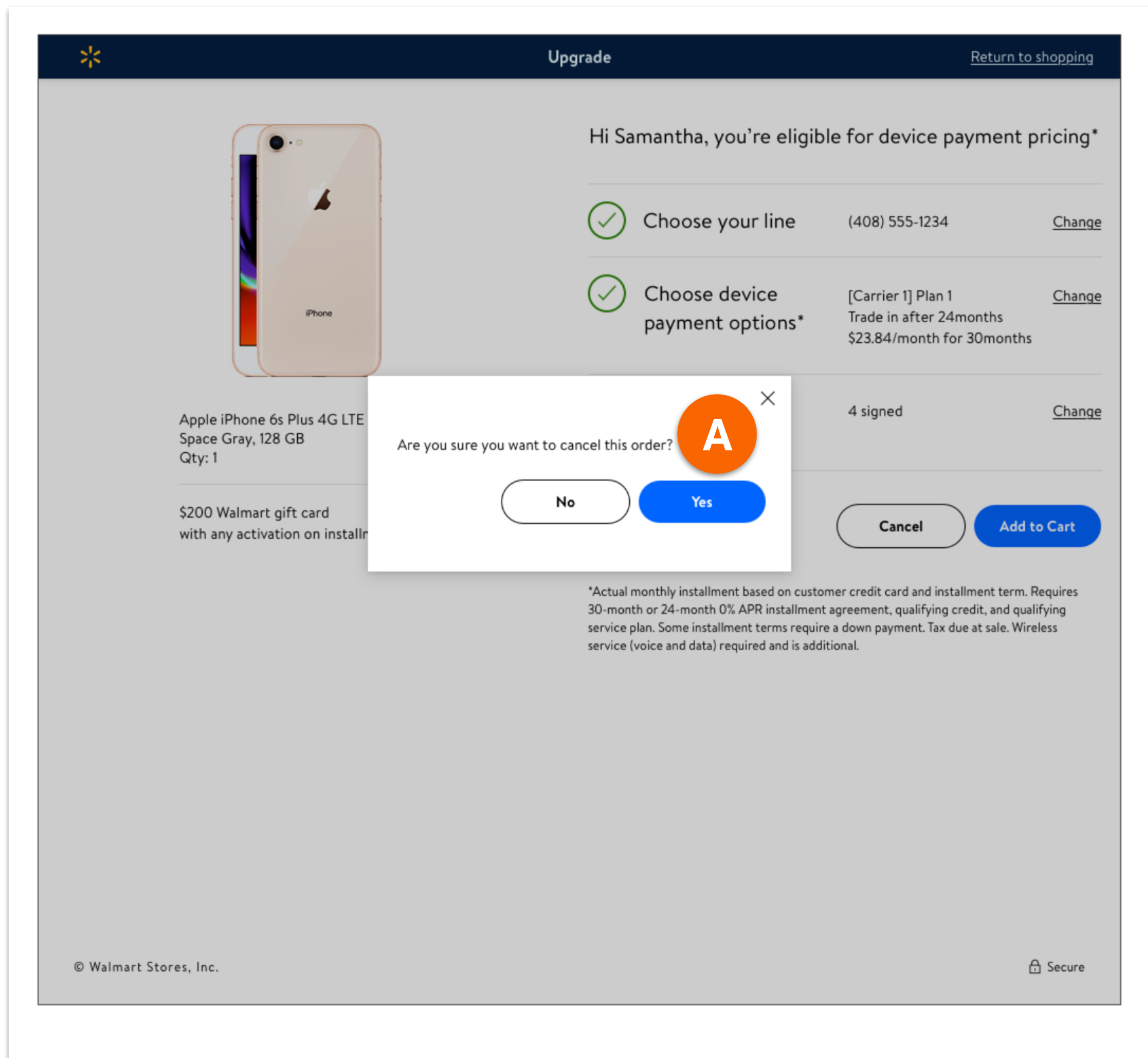
Secure

A

Provide customers with enough information to understand differences between plans

A

WARP: Review Flow



A

The customer can not actually delete an order as they have not yet placed one. Consider other language.

Cart: Warranty

The screenshot displays the Walmart cart interface. At the top, there's a search bar and navigation icons. Below the header, a promotional banner for a \$25 credit is shown. The main section, titled 'Your cart: 1 Item', features an iPhone X 4G LTE. To the right of the item, a price breakdown shows a subtotal of \$0.00, shipping of \$0.00, and taxes/fees of \$78.66, leading to an estimated total of \$78.66. A 'Check Out' button is prominently displayed. Below the item, 'Add-on services' are listed, including the Walmart Protection Plan powered by Allstate (selected), Apple Care, and a carrier device protection plan. Each plan has its respective cost and duration displayed. A 'Remove' or 'Save for later' link is at the bottom right of the item section.

Firstname, save **\$25*** when you open an account online & spend \$25 on your first online purchase today.

Purchase Amount \$35.50
Credit on Billing Statement -\$25.00
Cost after Statement Credit **\$10.50**

*Paid as a statement credit.
Can't be combined with other offers.
Subject to credit approval.
[Learn more](#) | [Open account](#)

Subtotal (1 item) \$0.00
Shipping \$0.00
Est. taxes & fees (Based on 94066) \$78.66
Est. total \$78.66

Check Out

Congrats — you get **free shipping!**
Free pickup available.
[Learn more](#)

Your cart: 1 Item

 iPhone X 4G LTE - [Carrier 1] Space Gray 64 GB
List \$899.00
\$0.00
Carrier financed
2-day shipping

Add-on services [See less](#)

Add a Protection Plan for this device
([See comparison](#))

☒ **Walmart Protection Plan powered by Allstate**
2 Years - \$79.99 3 Years - \$119.99

☐ **Apple Care**
AppleCare+ - \$79.99
AppleCare+ with Theft and Loss - \$119.99

☐ **[Carrier 1] Device Protection Plan - \$89.99**

[Remove](#) | [Save for later](#)

A

Price should update when protection plan is selected to reflect actual pricing in cart.

B

Provide gift cards and incentive information here for customers to consider with their updated pricing.

C

Provide customers with information about the coverage of each plan.

Confirmation



Search

ML

3

Thank you for your order #6051710359462

Keep Shopping

Shipping

You'll receive an email with tracking information when your item ships.

Shipping address

Fran Frugalista
850 Cherry Ave
San Bruno, CA 94066

Arrives by Mon, Nov 23



A

Add-on services

- 2-year Walmart Protection Plan
- Apple Care

[See your item details](#) +

Check your [order status](#) on Walmart.com

Order summary	Payment type	Billing address
Subtotal (1 item)	\$0.00	Visa ending in 2008
Add on services	\$179.98	
Shipping	Free	
Tax	\$78.66	
Total	\$258.64	

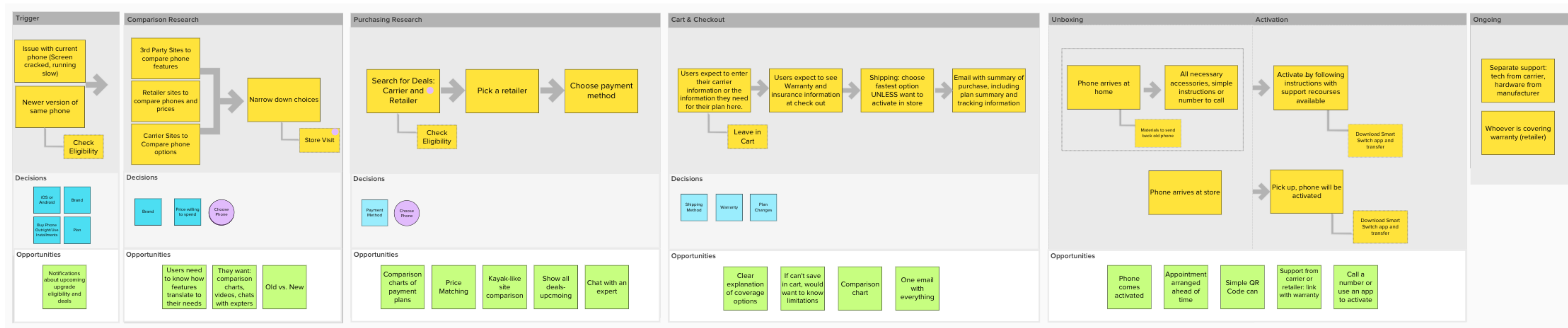
Fran Frugalista
850 Cherry Ave
San Bruno, CA 94066

A

Provide customers with next steps to help them plan; installment plan schedule, gift card incentive upon activation, etc.

Appendix

The Ideal Journey- Expanded



Comparison Chart Examples (Turbo Tax)

Compare TurboTax Online Products

We can handle your unique tax situation, even if you've had major life changes this year

Online Desktop Help me choose ▶

Getting your maximum refund starts here, choose your product

Free Edition	Deluxe	Premier	Self-Employed
Simple tax returns (1040EZ/1040A)	Maximize tax deductions and credits	Investments and rental property	Personal & business income and expenses
\$0 State additional	\$59.99* State additional	\$79.99* State additional	\$119.99* State additional
Start for Free	Start for Free Pay only when you file	Start for Free Pay only when you file	Start for Free Pay only when you file
★★★★★ (4.7/5 45296 reviews)	★★★★★ (4.5/5 86737 reviews)	★★★★★ (4.5/5 20586 reviews)	★★★★★ (4.6/5 16280 reviews)
More Details ▾	More Details ▾	More Details ▾	More Details ▾

NEW **turbotaxlive.**

CPA or EA advice and a final review

\$179.99*
State additional

Start for Free
Pay only when you file

★★★★★
(4.6/5 | 11054 reviews)

Hide Details ▲

Tell us about you – we'll recommend the right tax solution

Select all that apply.

I want to maximize deductions and credits

I have a job (received W-2)

I have children or dependents

I paid rent

I donated to charity

My life has changed and I have questions

I'm self-employed/independent contractor

I own a business

I paid out-of-pocket medical expenses

I own a home

I'd like CPA or EA assistance

I sold stock or own rental property

Am I self-employed? What's a CPA and EA?

WE RECOMMEND

Free Edition	Deluxe	Premier	Self-Employed
Simple tax returns (1040EZ/1040A)	Maximize tax deductions and credits	Investments and rental property	Personal & business income and expenses
\$0 State additional	\$59.99* State additional	\$79.99* State additional	\$119.99* State additional
Start for Free	Start for Free Pay only when you file	Start for Free Pay only when you file	Start for Free Pay only when you file

NEW **turbotaxlive.**

CPA or EA advice and a final review

\$179.99*
State additional

Start for Free
Pay only when you file

Participants mentioned comparison charts for product features, pricing, and warranty plans and gave examples of shopping for airline tickets or insurance. Here is an example of what this could look like, from Turbo Tax.

Background: Business Context

- Objective (Postpaid)L Enable walmart.com customers to view, select, and purchase postpaid eligible wireless devices while providing them the option of Upgrade their existing device or adding/opening a new line of service with their carrier.
- Expected impact: \$1.2B opportunity
- Timelines changed halfway through research phase, so MVP designs were created without insights from this study.
- Findings were thus separated into two sections: Findings, and suggestions for MVP designs rooted in research findings.

Research Design

- Study: 9/17/18-10/17/18
 - Remote-moderated hour-long interviews over Zoom using Mural to create ideal journeys. Participants and moderators co-created an ideal journey on Mural.
 - 15 Participants: Ages 26-54, income \$25k-\$200+k, Android and iPhone users considering or currently searching for a new phone, looking to purchase from a retailer such as Target, Best Buy, or Walmart.

Research Questions

- **Goal: Uncover the ideal journey for someone buying a new phone or upgrading their phone online.**
- Research Questions:
 - What's the decision tree when buying a phone? (OS, phone features, carrier, brand, product features, plan, price tier, accessories)?
 - What do people care most about when deciding about a phone?
 - How do they want to see this information Ex. Should 8, 8+ be on a single PDP? Should they be separate PDPs?
 - What are the preferences around warranties (Apple Care, Walmart, Carrier)?
 - If upgrading, what do people know about their eligibility? Where and when do they want this information?
 - Do we need to have a guest checkout? If we didn't, would you go buy somewhere else (no Walmart account).
 - Only one item that goes through WARP can be in your cart, when do you need to know that information?
 - How do they decide to buy a phone outright vs. installments? Thoughts around each option.
 - What do you expect to happen if you leave a phone in your cart and then don't purchase it for a while?
 - It may not be available anymore or you may not be eligible for upgrade, what now?
 - When you expect when you receive your phone?
 - Do you need help setting phone up? Where would you go for help
 - How do you know how to put in the SIM card and activate the phone?
 - What do you expect to get in the box?
 - What do you expect to come as instructions?
 - What do you expect to have to do with the pieces in the box?
 - How will you figure out what to do?
 - Once you get your phone, where do you go to maintain it? Would you login to Walmart? To Apple? To Verizon?
 - If you buy a phone at Walmart, who sends you the email about everything coming down the road? Walmart? Verizon