



Vision Work

Defining the next projects for
Wayfair Professional - Tools & Services

Team:

1 Product Design Lead, 1 UX Researcher,

Role:

Product Design Lead

Timeline:

2 Weeks (December 2022 - Jan 2023)

Project Status:

Discovery phase is delivered.
Execution in progress.



BACKGROUND

What is Wayfair Professional

Wayfair Professional is a free membership program that unlocks “pro” pricing on millions of furniture, decor, and commercial products.

In addition to discounts, this program provides additional tools and services to help professional customers meeting their business needs.



Who are the users?

- Interior Designers
- Builders & Contractors
- Hotels
- Food Services
- Offices

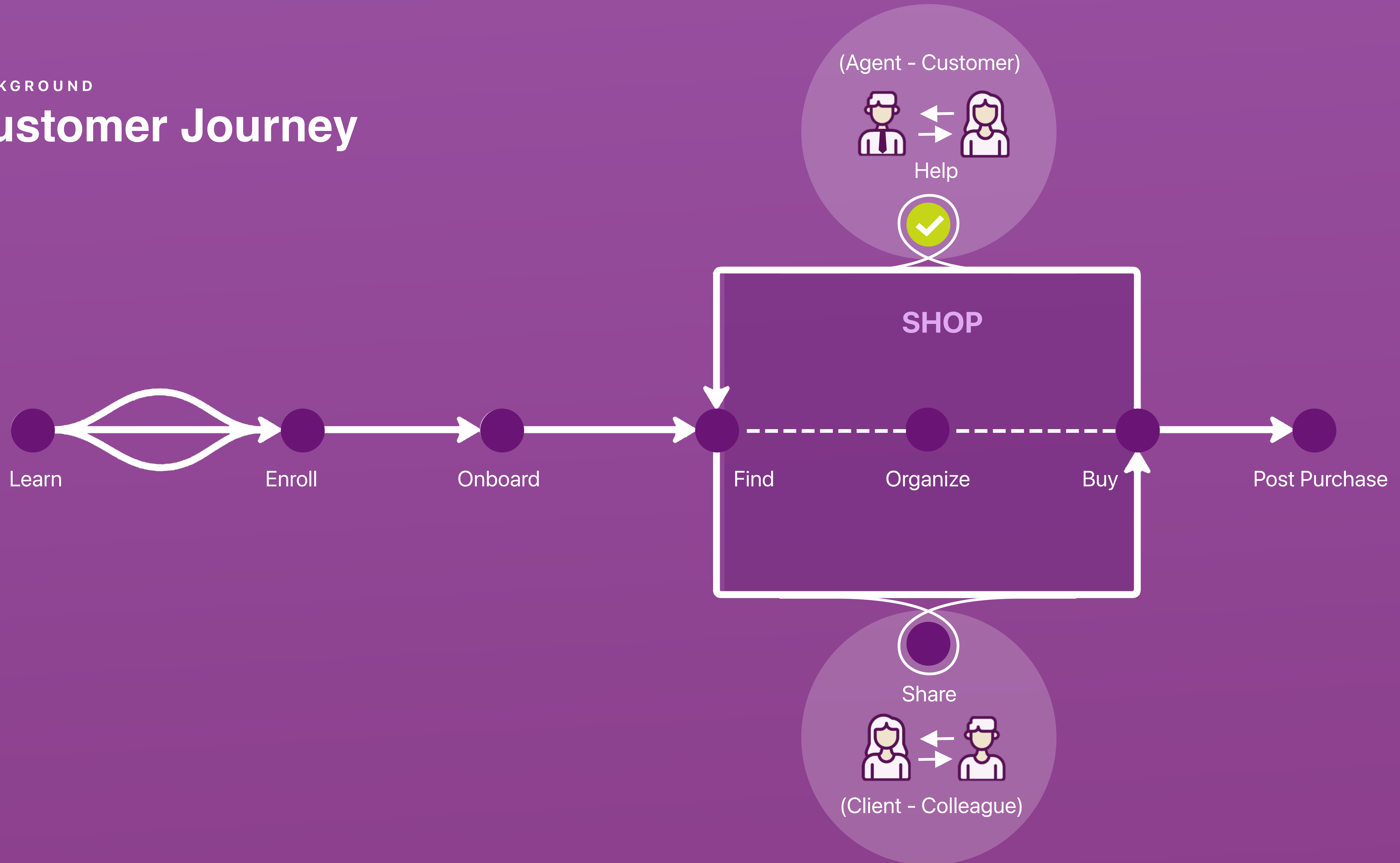


What are some of the benefits?

- Pro Pricing
- Dedicated Account manager
- Consolidated Delivery
- Financing Options
- Design Services
- ▶ ● **Professional Tools&Features**
for different types of users

BACKGROUND

Customer Journey



BACKGROUND

How did it start?



Tracking the data of how professionals place their orders showed that in average more than **78%** of the pros go to their dedicated account manager or on-demand customer service to finalize and place their orders.



This was increasing the volume of the calls. With the limited available resources it was putting a lot of pressure on Wayfair pro customer service team.



In addition to putting pressure on Wayfair Professional customer service, this was becoming very cost concerning for the business.



Business goal:

To reduce the calls by 30%

by understanding the problem and finding the right problem to focus on to solve this problem.

Sales / On-Demand Services Discovery

Timeline: 2 Weeks

Team: Me (As Product Design Lead), 1 UX Researcher



RESEARCH

Who are Sales / On-Demand Services?

Wayfair Professional provides **personal services** to all professionals. Based on the total annual spending or the size of the business, high spending businesses can be assigned to a personal account manager or for lower spending customers, they can access to the same services whenever they need via **on-demand service**.

Since there wasn't enough data or clarity on this part of the customer journey, as our first step, a short discovery was held to learn more about the **most common needs** that drives customers call OD Agents and **how do they interact**.



RESEARCH

What did we need to learn?

- What does this part of the **customer journey** look like?
- What are the **common reasons** for Pros to call an on-demand agent?
- **Where in the shopping journey** Pros need help the most?
- How does an on-demand agent **help** our customer?
- What are the **pain points**?
- How can we **approach** these pain points?

How did we approach it?



Secondary Research

Reviewing 11 research documents that were completed previously which could have some data related to this part of this journey.



Call Listening

Listening to **30** recorded Calls between Pros and On-demand



Ideation

3 ideation sessions with a group of on-demand agents, researchers, designers and stakeholders were held around each breakpoint. At the end all of the ideas were synthesized and grouped.



Interview

10 Interviews with On-demand agents and account managers



Competitive Analysis

Looking at other competitor's (Amazon Business, Home Depot, Designfile,...) solutions for the existing challenges



Concept Design

For each group of ideas, a set of high level concepts were designed. These HL Designs were shared with the same group to vote for. The selected concepts were mapped on the feasibility/impact timeline and were prioritized.

PHASE 1



Analyzing the findings

PHASE 2

PROCESS

Ideation Sessions

3 ideation sessions with a total of 15 participants were held. Participants were from of selected from different group of on-demand agents, researchers, designers and stakeholders. At the end all of the ideas were synthesized and grouped into 5 main themes:

- ✔ Improving Self Serve
- ✔ Self Serve Quotes/discount Enhancement
- ✔ Contextual Help
- Outlining our Services
- Service Tiers

3. IDEATION (40 MIN)

Ideation Session 1

SPEEDY SERVICE

Our user's time is extremely valuable. While we have great customer service it could be more efficient - it's not easy to find, it's not as flexible as competitors, and the sales interaction can feel tedious due to slow and manual processes.

HMW make it easy to find and access help anywhere?

HMW direct users to the right help? And reduce transfers?

HMW let users decide how they want to be helped?

HMW be even more flexible and accommodating?

HMW make hold time more valuable?

HMW educate users to prepare best for a sales call?

HMW more quickly and easily identify our pro members?

HMW leverage data to streamline the sales interaction the agent knows you?

HMW empower users to self-serve more easily?

IDEATION (40 MIN)

Ideation Session 2

Who is "Pre-Order-Support"?

Pros are unaware and unsure of who "Pre-Order Support" is, what they do, and why to call them. Our agents wear many hats - product experts, supplier middleman, site help, support triage etc - but their metrics and incentives mostly support their role as sales people.

HMW make it clear why and when to seek help on SF?

HMW introduce our WayPro sales team on SF in a more engaging way?

HMW provide more contextual, in-the-moment help when users are struggling on site?

HMW empower users to self-serve more easily and often?

HMW support pro's seeking technical expertise?

HMW ensure pros feel supported after speaking to an agent?

HMW provide savings and discounting in a more formal and transparent way?

HMW create a greater sense of continuity for pros?

HMW reduce the sales pressure felt by customers?

HMW better utilize our collection of resources: Help Centre, Questions and Answers on PDF, Buying Guides etc.

IDEATION (40 MIN)

Ideation Session 3

GATEKEEPERS GALORE

Customers may interact with many actors and gatekeepers for support - enrollers, BDR, inbound, outbound, BAM, B2C customer service - which can be confusing and difficult to navigate.

HMW explain our customer service network and services?

HMW simplify and streamline the help experience for users?

HMW build awareness of services a pro may be eligible for?

HMW empower users to choose the help and services they want/need?

HMW increase the odds of connecting agents and users?

HMW create a greater sense of continuity for pros?

Participants: Prashant, Olivia, Cathy, Becky, Prab, Ryan, Lindsay, Maryam, Chris

Ideas include: "remove the idea of 'discount code you need to call in to use'", "Allow customers to build a list of items to request a quote on", "Add a 'pro' badge to the agent's name", "Use chat for more than call", "Leverage chat more, pro prefer chat more than call", "See that to start the conversation while calling agent", "Start from 1 number, filter by phone service, direct customer to the right agent", "Call back form", "Start from chat box to filter down the needs and require for base information", "Chat bot for FAQ", "Use chat for more than call", "Can we generate a code that appears as an invoice on the screen when they call in to get help?", "Call time when the agent is on the line, give the agent a heads up that they're on the line", "Schedule call when chat call are unavailable - Post signs in the UI?", "Agent can trigger 'input credit card' as a pop up on the website", "Auto authenticate based on token from app or website", "Give agents access to all their 'input credit card' based on token from app or website", "Show agent's name and photo on the website", "Consistent help buttons everywhere on the site eg. floating help on every page", "Help screen to direct user to the right place eg. 'is this about an existing order?'", "Agent can trigger 'input credit card' as a pop up on the website", "Allow customer to register their phone number for next time they call in system recognizes it automatically", "Auto authenticate based on token from app or website", "Give agents access to all their 'input credit card' based on token from app or website", "Show agent's name and photo on the website", "Start from 1 number, filter by phone service, direct customer to the right agent", "1 phone number only (call and hear menu)", "During hold we share pro tips, program education", "Floating help number on bottom right of every page", "Customer service page outlining how to use each method (email, phone, chat)", "Sales training for pros - add item to your cart before calling in", "Pro ID numbers (easier to say than email address)", "Show quote callbacks, ping agent is available", "Carrying over the info like the product that they are looking for (possibly via chat or chat with the agent)", "Chatbot that can also provide product info (looking for the weight, ...)", "Search in-spec (in-page) for customers to find the info they need", "Use different triggers to predict the help customer might need", "Providing the relevant contact info in different steps of the journey", "and pro-actively showing 'need help with X?' to the customer", "adding 'expert help' for products that need more support", "Providing levels of service (based on the spending)", "Including searching within 'questions'", "HMW create a greater sense of continuity for pros?"

Participants: Andrew, Jack, Jim, Lindsay, Maryam, Chris

Ideas include: "Use chat for more than call", "Can we generate a code that appears as an invoice on the screen when they call in to get help?", "Call time when the agent is on the line, give the agent a heads up that they're on the line", "Schedule call when chat call are unavailable - Post signs in the UI?", "Agent can trigger 'input credit card' as a pop up on the website", "Auto authenticate based on token from app or website", "Give agents access to all their 'input credit card' based on token from app or website", "Show agent's name and photo on the website", "Consistent help buttons everywhere on the site eg. floating help on every page", "Help screen to direct user to the right place eg. 'is this about an existing order?'", "Agent can trigger 'input credit card' as a pop up on the website", "Allow customer to register their phone number for next time they call in system recognizes it automatically", "Auto authenticate based on token from app or website", "Give agents access to all their 'input credit card' based on token from app or website", "Show agent's name and photo on the website", "Start from 1 number, filter by phone service, direct customer to the right agent", "1 phone number only (call and hear menu)", "During hold we share pro tips, program education", "Floating help number on bottom right of every page", "Customer service page outlining how to use each method (email, phone, chat)", "Sales training for pros - add item to your cart before calling in", "Pro ID numbers (easier to say than email address)", "Show quote callbacks, ping agent is available", "Carrying over the info like the product that they are looking for (possibly via chat or chat with the agent)", "Chatbot that can also provide product info (looking for the weight, ...)", "Search in-spec (in-page) for customers to find the info they need", "Use different triggers to predict the help customer might need", "Providing the relevant contact info in different steps of the journey", "and pro-actively showing 'need help with X?' to the customer", "adding 'expert help' for products that need more support", "Providing levels of service (based on the spending)", "Including searching within 'questions'", "HMW create a greater sense of continuity for pros?"

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GOT STUCK? NEED SOME

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Amazon Chatbot
Providing the basic info with their chatbot to reducing the volume of the calls and chats with the live agent.
Transferring to the live agent for more complicated issues/questions.

Amazon In-page Search
"Looking for specific info?" This makes it faster and easier to search for specific information that customer is looking for instead of reading the whole description/specs.

GOT STUCK? NEED SOME

J Crew
Customer help with some triggers: When adding 2 items of one product, they ask if you need help with sizing.

Build.com
Project Experts: Build refers to their team as "project experts" and provides a bulleted list for "how we can help".

Zappos
Describes what help you can get, and how you can get it. They educate customers that they can self-serve for returns, exchanges etc. They explain that the "Customer Quality Team" can help you find what you need, and answer questions.

Home Depot
Pro Support: Pro Support is shown clearly, alongside other help teams.

Apple
Makes clear how to leverage their various kinds of help, whether community help, customer service support or their support hub.

GOT STUCK? NEED SOME

Home Depot Pro
Pro Xtra Support is shown clearly, alongside other help teams. On the business account's dashboard you can clearly see your spend, what tier you belong to, and what the next tier is.

Recent Purchases table:

Date	Quantity (Units)	Order Date	Total
01/10/2025	1	01/10/2025	\$0.00
01/10/2025	1	01/10/2025	\$0.00
01/10/2025	1	01/10/2025	\$0.00
01/10/2025	1	01/10/2025	\$0.00
01/10/2025	1	01/10/2025	\$0.00



THEME 1

Improving Self Serve

Based on the discovery findings, **top 5** reasons for pros to call are:

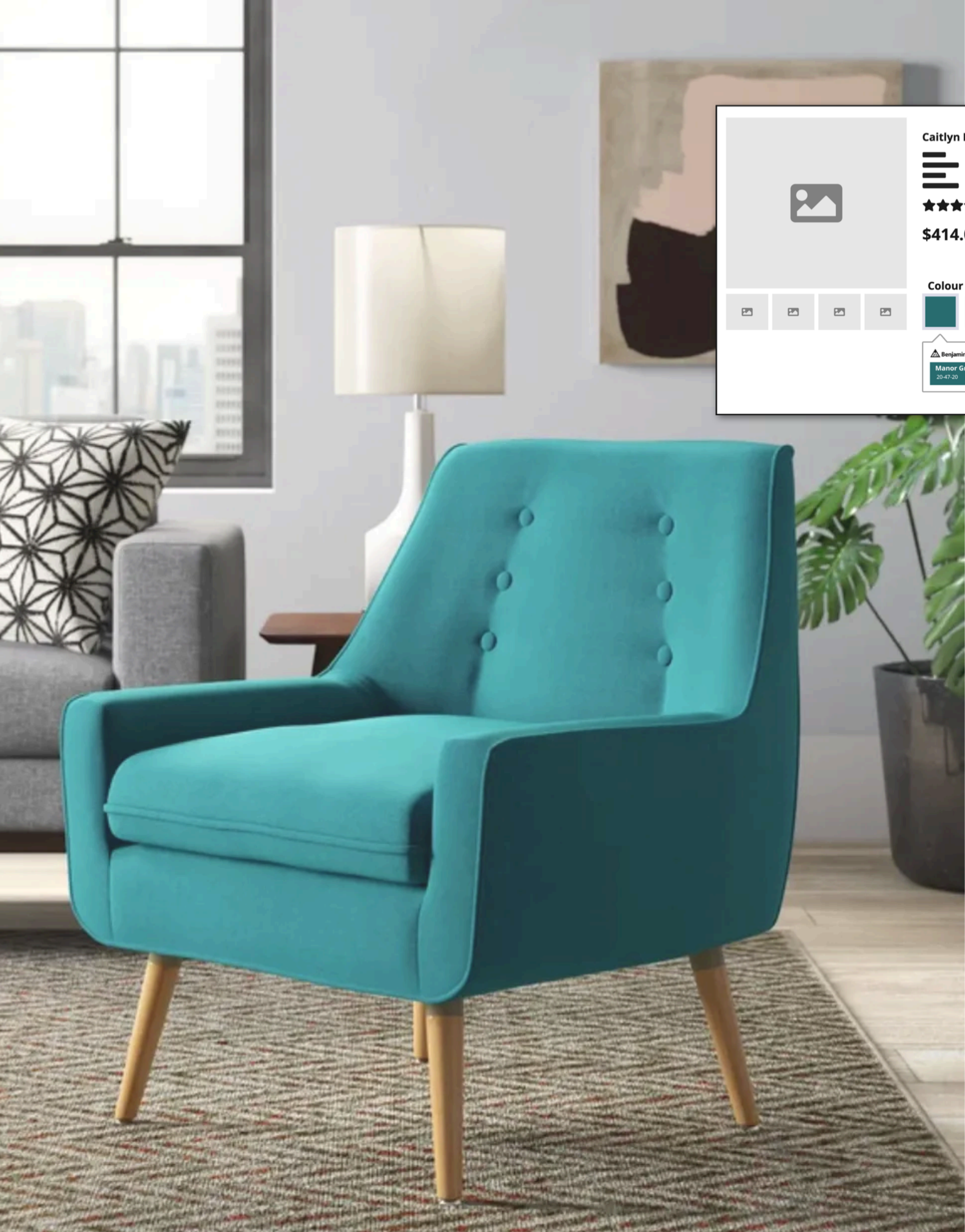
- Getting additional info about the product
- Confirming information such as colour, size or material
- Getting additional discount
- Local Compliance laws check
- Getting expert advice on products that need installation

In this theme which was the most repeated one among all steps of this discovery work, to decrease the volume of the unnecessary calls, the focus was on **increasing customer's confidence** to finish the shopping process on their own by providing more self serve options.



High Level Concepts

IMPROVING SELF SERVE



Caitlyn Knighten 24" Single Bathroom Vanity Set

★★★★★

\$414.00

Colour

Benjamin Moore
Manor Green
20-47-20

Colour

Benjamin Moore
Manor Green
20-47-20

a Colour match

Matching the colour of the product with the closest **Benjamin Moore** or **Pantone** colour swatch

b Review Enhancement

All Pro reviews Brand reviews On social media

Pro badge for pro accounts

Adding different tabs/categories for the reviews:

- Pro reviews
- Brand reviews
- Social media

Showing the summary at the top

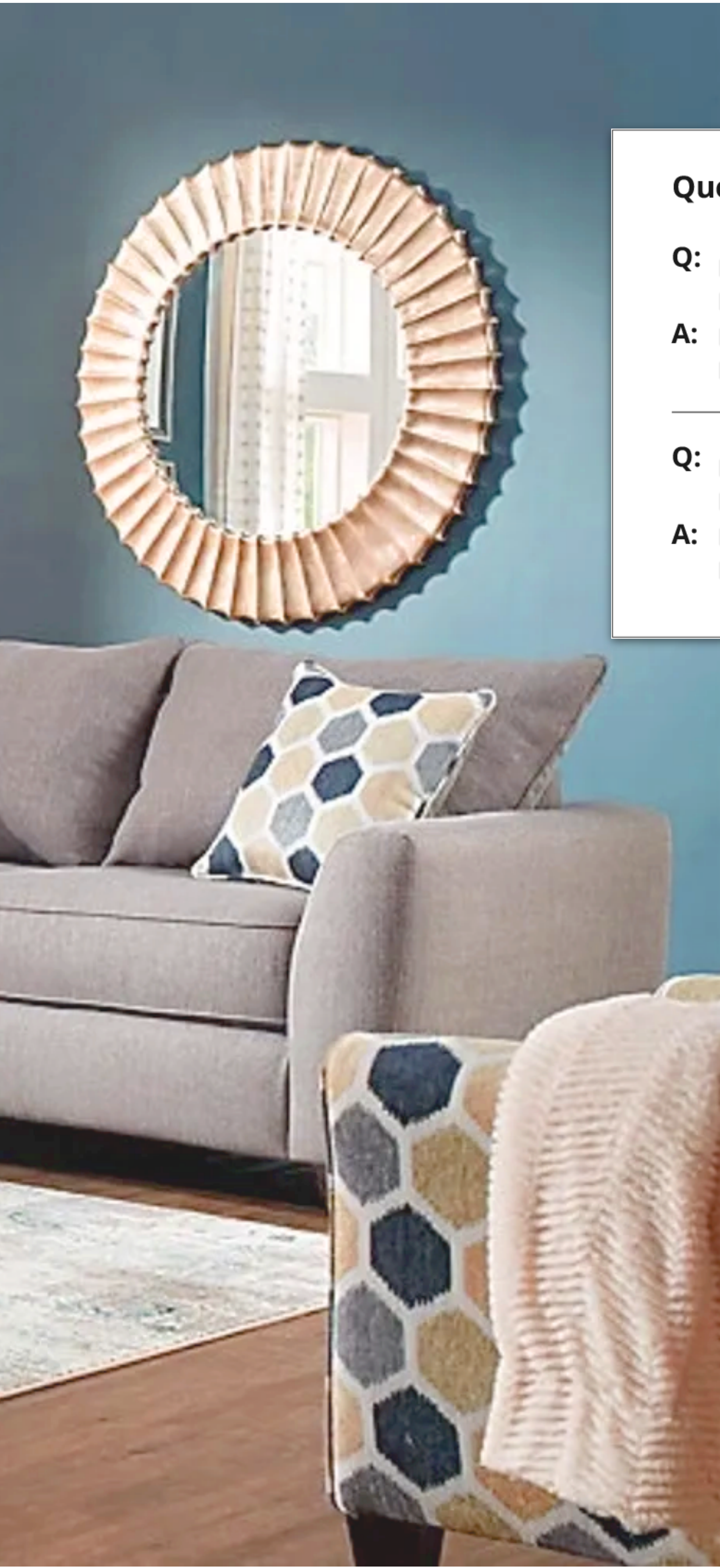
All Pro reviews Brand reviews On social media

Colour Accuracy: **Accurate** 4.7
Material Quality: **High** ★★★★★

Colour Accuracy: **Accurate**
Material Quality: **High**

Colour Accuracy: **Lighter**
Material Quality: **High**

Adding "Colour accuracy and Material quality" to the review form, so it can be shown separately in review section



Questions and Answers

Q: [Redacted] 10 [thumbs up icon]

A: [Redacted]

Q: [Redacted] 6 [thumbs up icon]

A: [Redacted]

C Questions and Answers

► Prioritizing the questions

Prioritizing the list based on the helpful count

► Multi Users Answers



Questions and Answers

Q: [Redacted] 10 [thumbs up icon]

Wayfair Response [multi-colored diamond icon]: [Redacted]

Pro's Response [grey person icon with checkmark]: [Redacted]

supplier/brand specialist response [blue person icon with gear]: [Redacted]

► Pinning the question at the top

PDP Page > Specs

Weight & Dimensions

Specifications

[Pinned Question]

Q: [Redacted]

A: [Redacted]


Have a question? [Call Us]


For commonly asked questions, allowing ODs and account managers to pin a Q&A to the top


OR

Automatically adding the highest ranked Q&A responses



 This product is approved by 123 pro customers

 1000 pros liked this product

 1/300 returned this product

d Adding product stats badges

If there's any product stats that can help with the validation of the product, showing them in the review section.

e Filter: Local Compliance laws

When the filtering is showing non-local compliance law" option, then badges are added on the relevant items



Using some logics/triggers



For specific classes when applied, dynamically having "local compliance" in filter options

BROWSE

Category

End-of-year clearance

Fast Delivery

Commercial Use

Local Compliance xx

Category

End-of-year clearance

Fast Delivery

Commercial Use

Local Compliance xx

Enter ZIP Code

123456

Product Name \$344.90

Product Name \$344.90

Product Name \$344.90

Product Name \$344.90

Product Name \$344.90

Product Name \$344.90

Product Name \$344.90

● When it's selected, then progressively adding the zip code field to be able to find the right products for that zip code area

● Pre-populating the zip code based on what's in the file or based on the IP address



THEME 2

Quote Enhancement

(Freezing the price)

As mentioned, receiving additional discount is one of the most common reasons for pros to call On-Demands.

This is due to the lack of transparency in how the additional discount calculation works which puts ODs in a position to be the one to validate and apply the additional discount on the calls.

Being able to make this discount automated means improving the existing “**Quote**” feature that already exists in Wayfair Professional.

This feature allows pros to **freeze the price** for one or a group of items for 30 days.

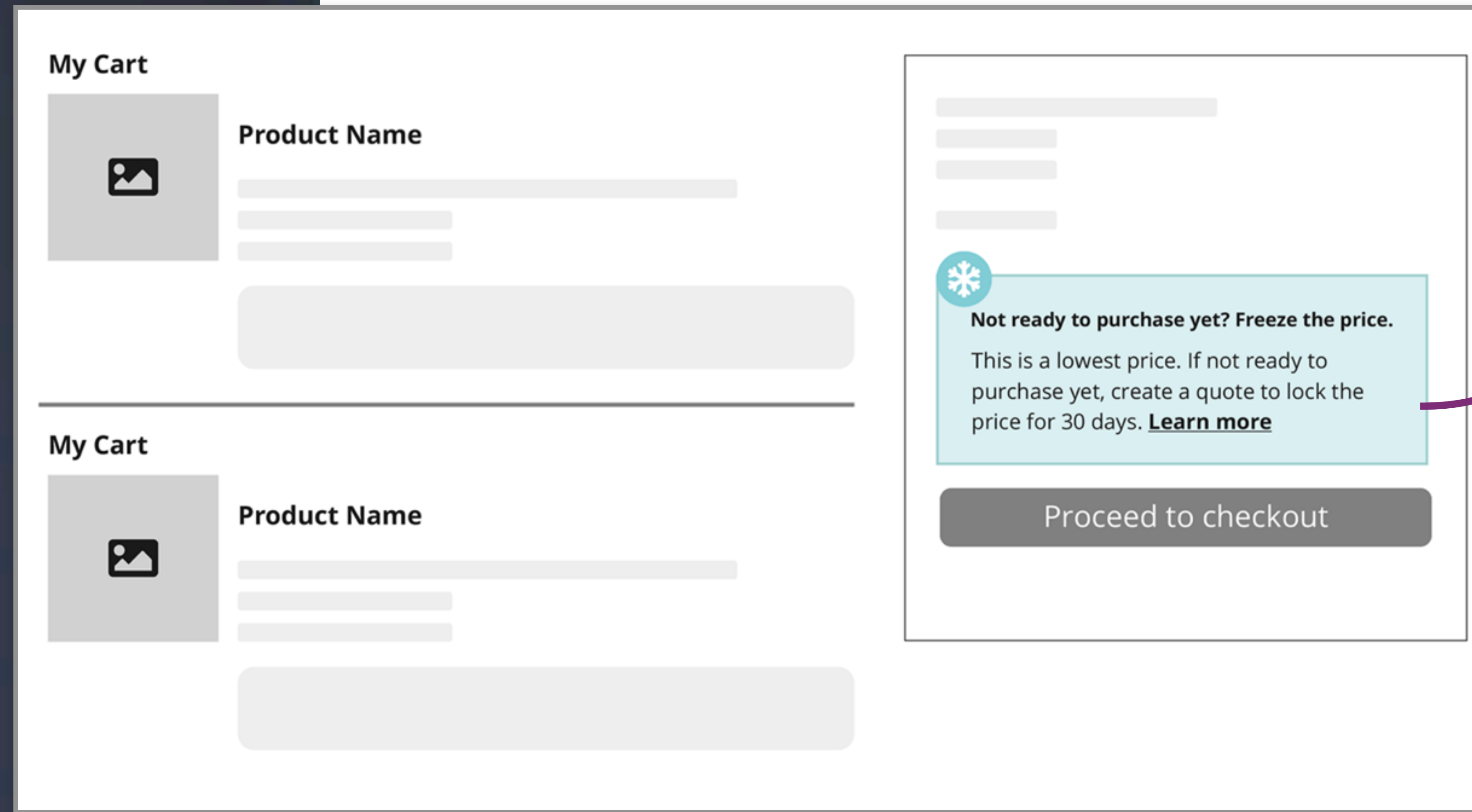
Today this feature is very hidden and is being used by less than 40% of the Pros only. In this theme beside understanding the barriers of this feature that prevents it from being used, the focus was on:

- **Improving the existing feature**
- **Including the automated additional discount**
- **Bringing more visibility on the benefits of this feature**



High Level Concepts

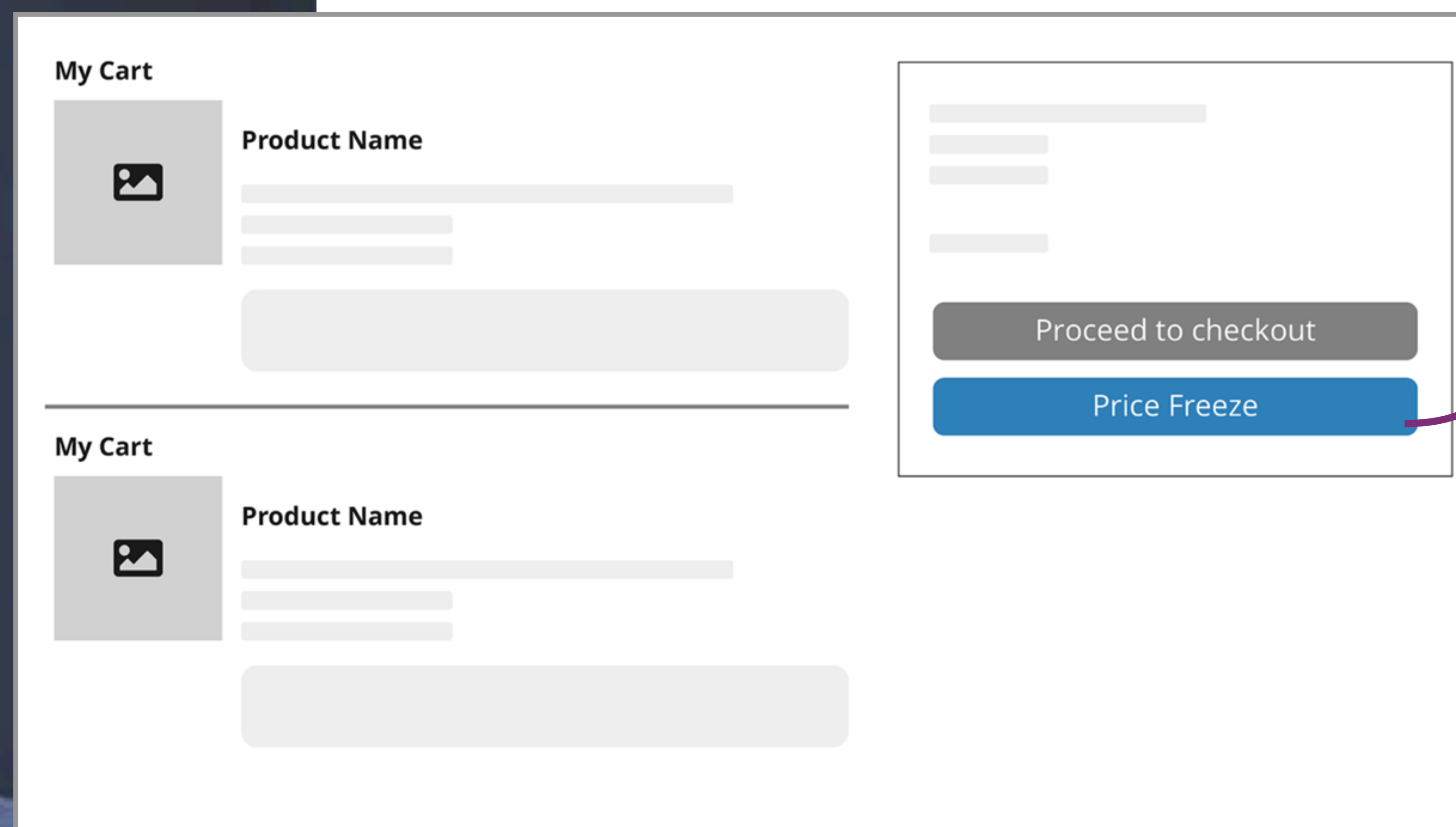
QUOTE ENHANCEMENT



Not ready to purchase yet? Freeze the price.
 This is the lowest price. If not ready to purchase yet, create a quote to lock the price to 30 days. [Learn more](#)

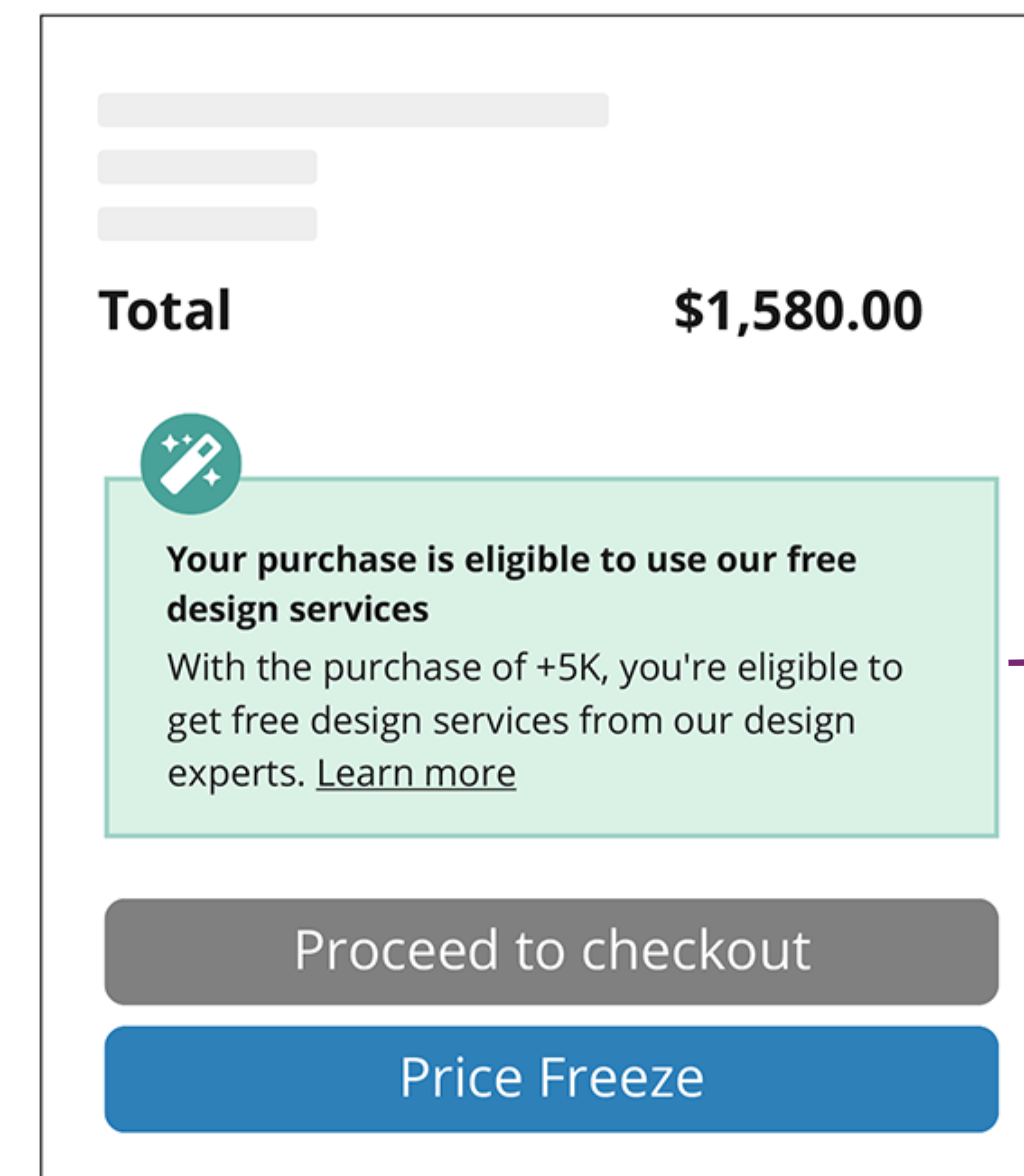
a **Lowest rate insight In the Cart**

To build on the onboarding concept to use quote acquisition hook: When the price is a good deal and customer already has the items in the cart, we can tell them "this is the lowest price"

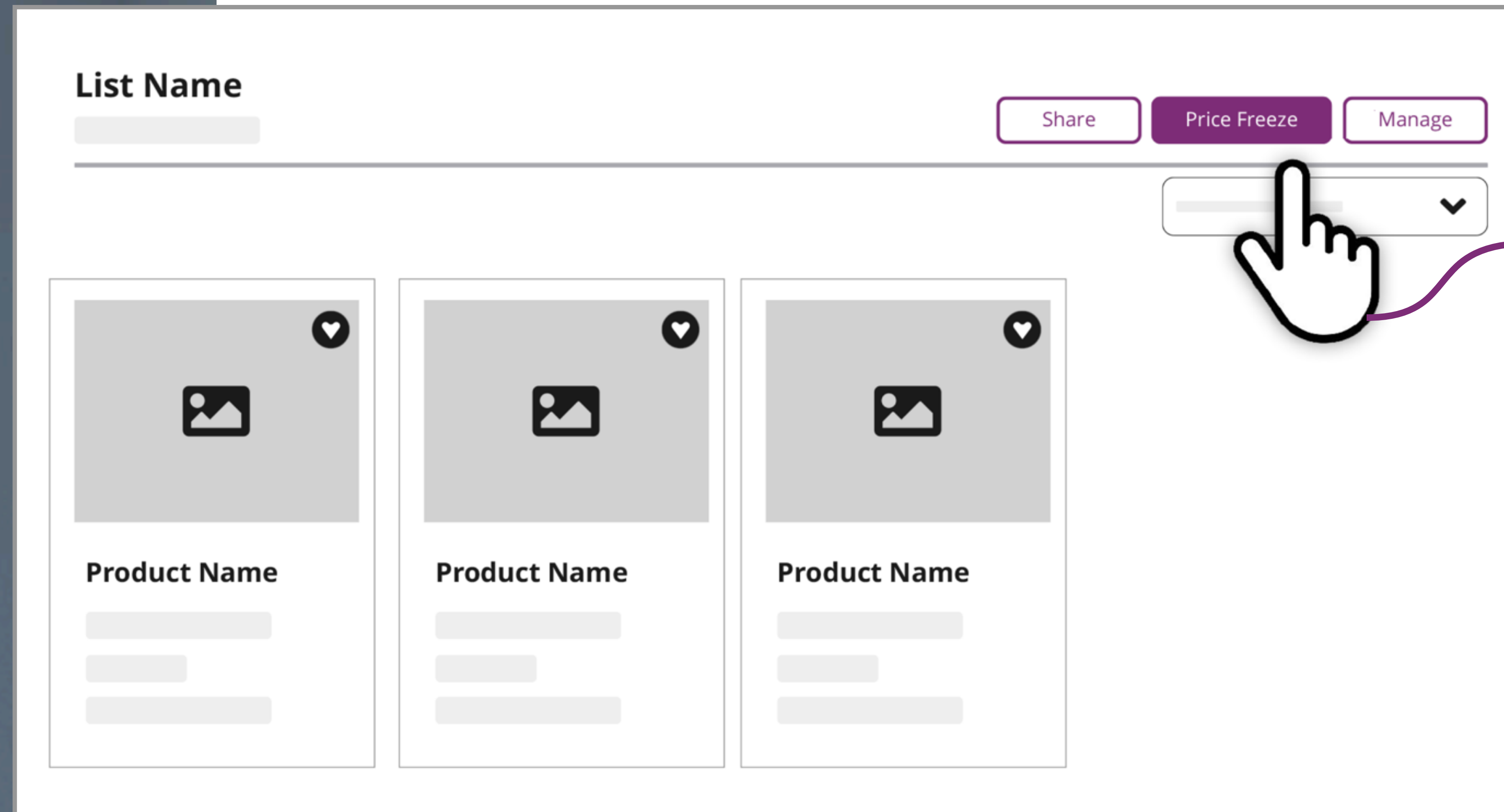


b **Price Freeze Button**

c **Outlining Discount & Services**



Outlining the additional flat rate discount and services

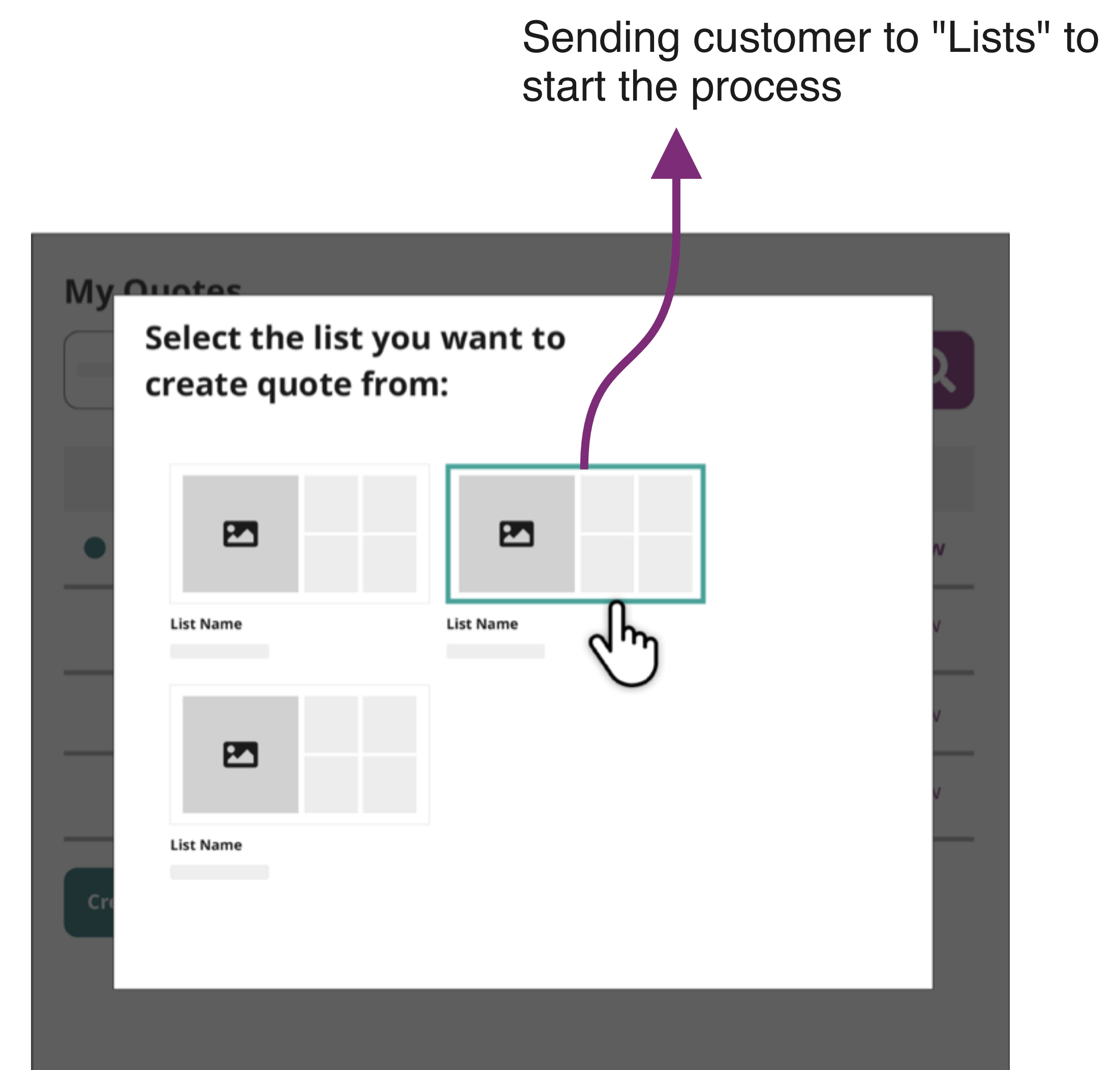
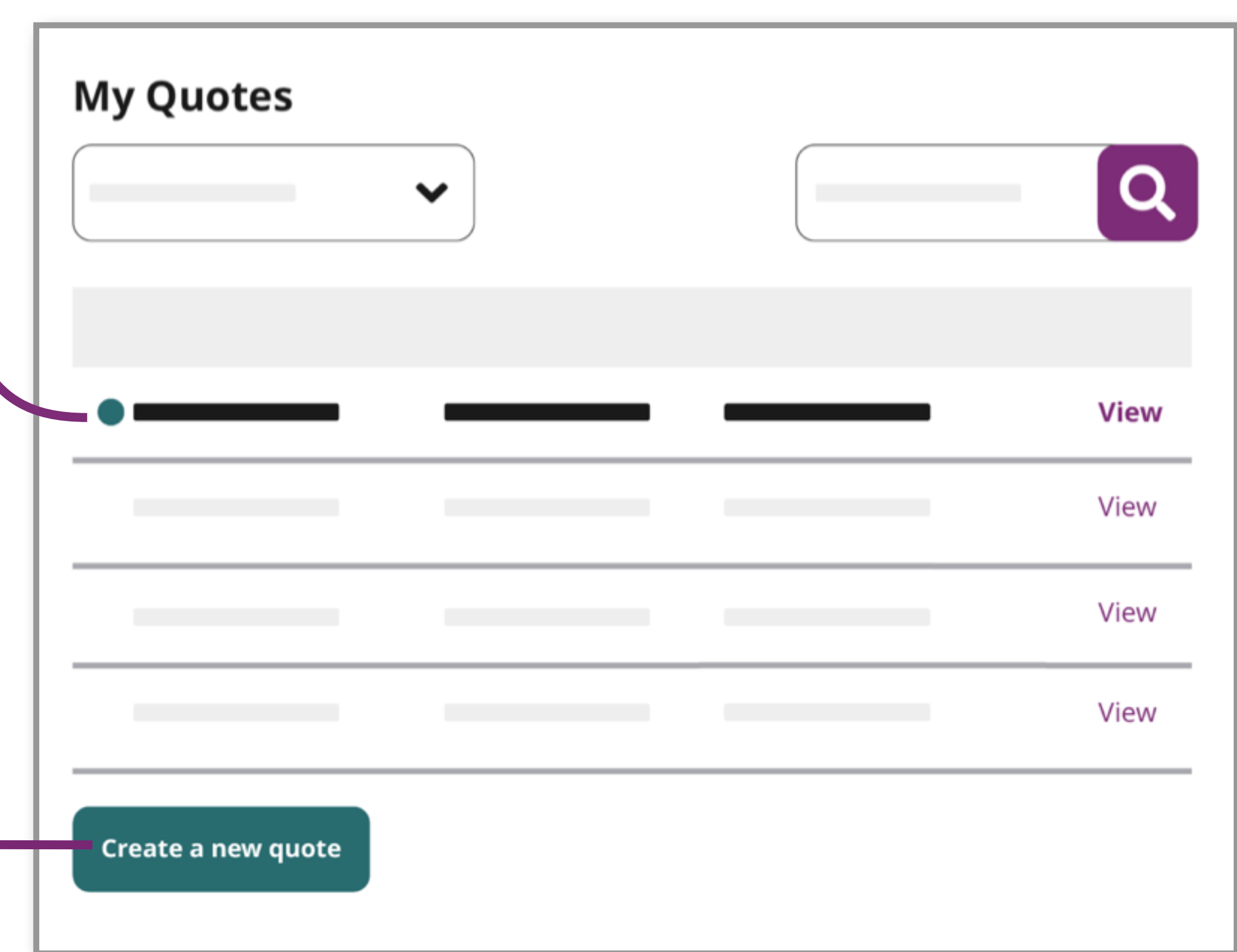


a Adding "Create a Quote" feature to the "Wish List"

MY QUOTES

b The newly added quote by OD will be shown in "My Quote" in "Unread" format

c Button to add a new quote





THEME 3

Contextual Help

To make sure our Pros get the help they need when they need it, the key was to help them at any time in a **smarter**, **faster** and **easier** way.

For stopping the shopping journey from being interrupted and having a smoother experience, in this theme the focus was on:

- **Looking at “Where” customer needs help**
- **Using the triggers to pro-actively helping Pros during the shopping journey.**



High Level Concepts

CONTEXTUAL HELP

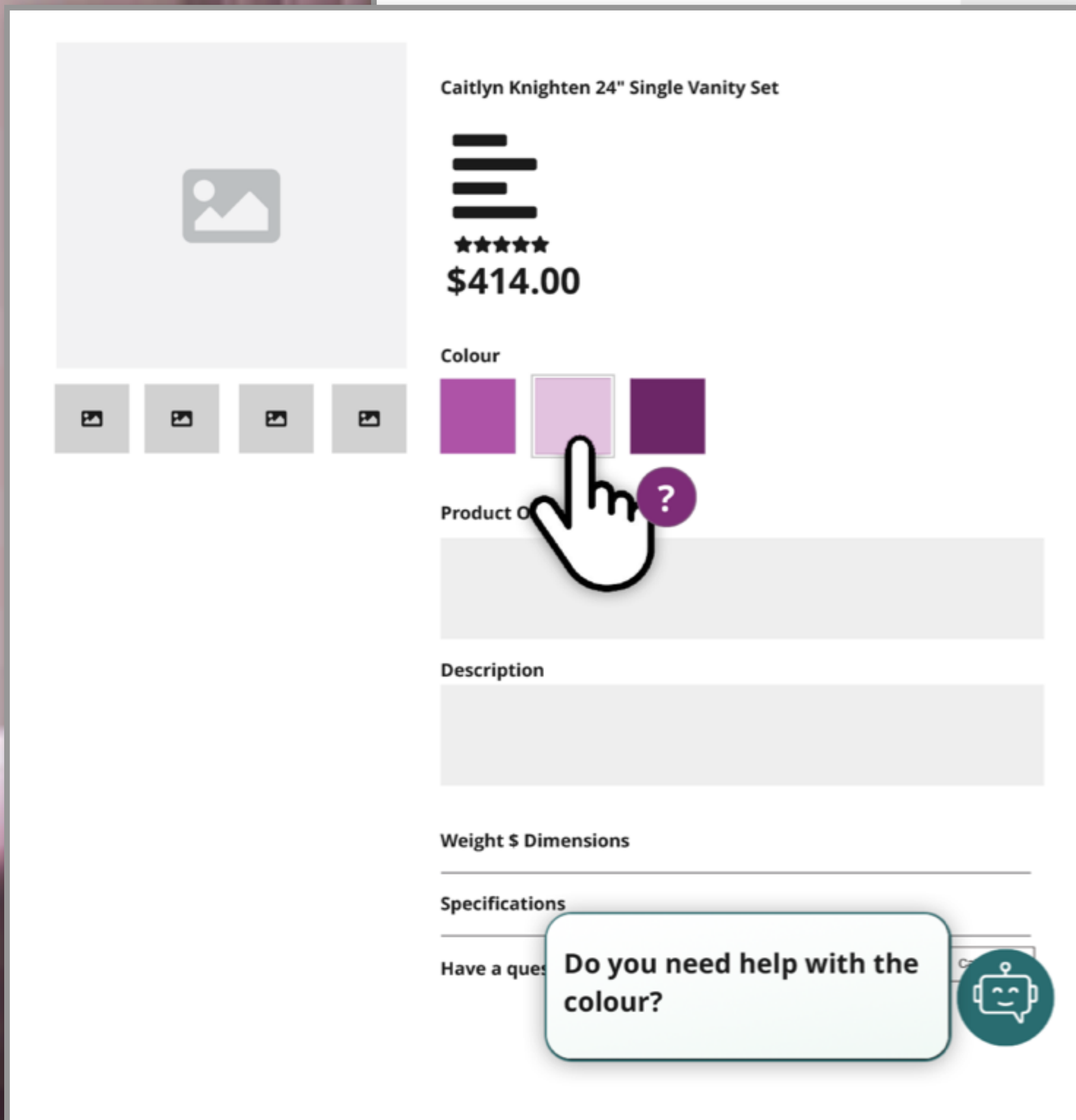
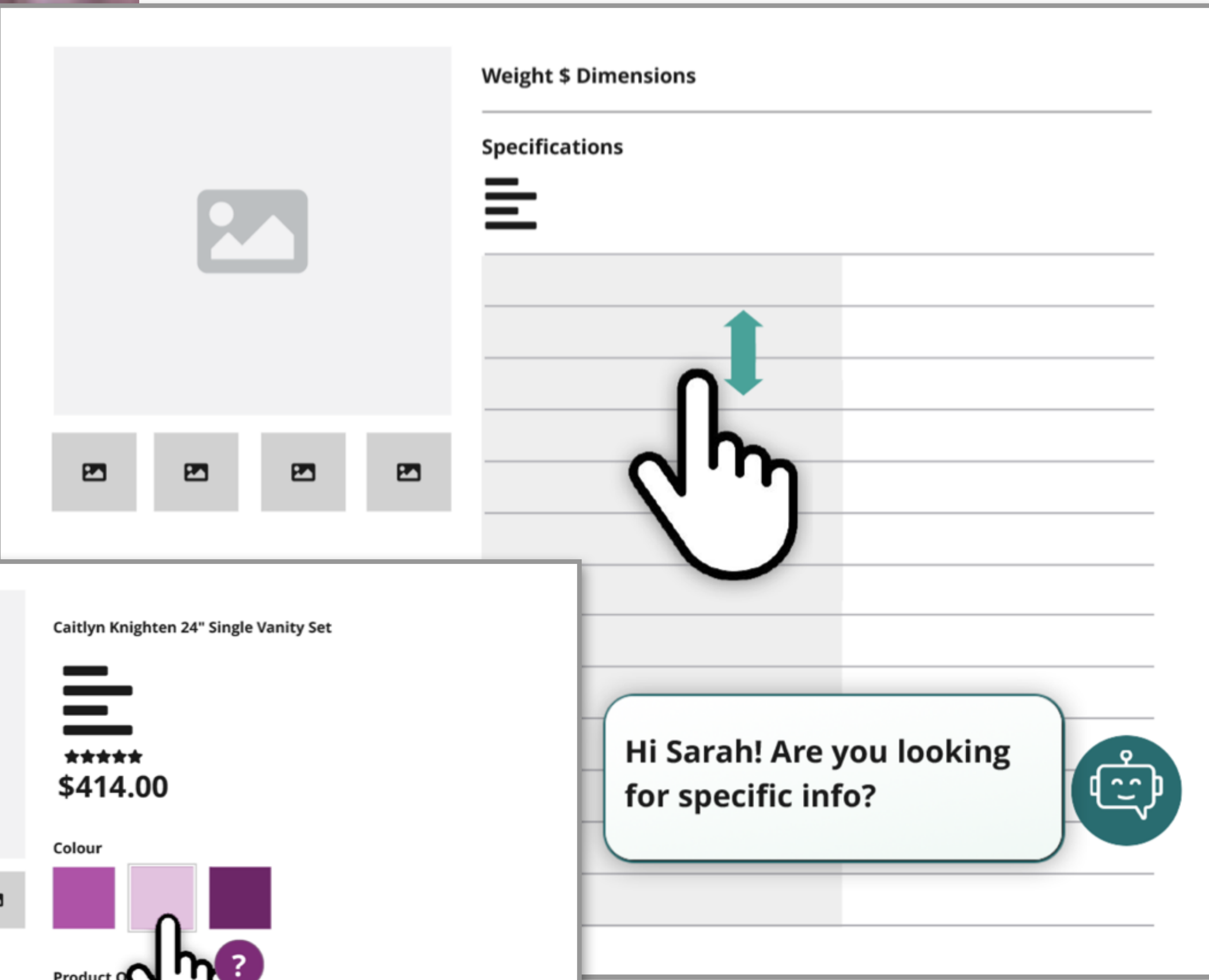
a

Proactively trying to help the customer with finding what they are looking for

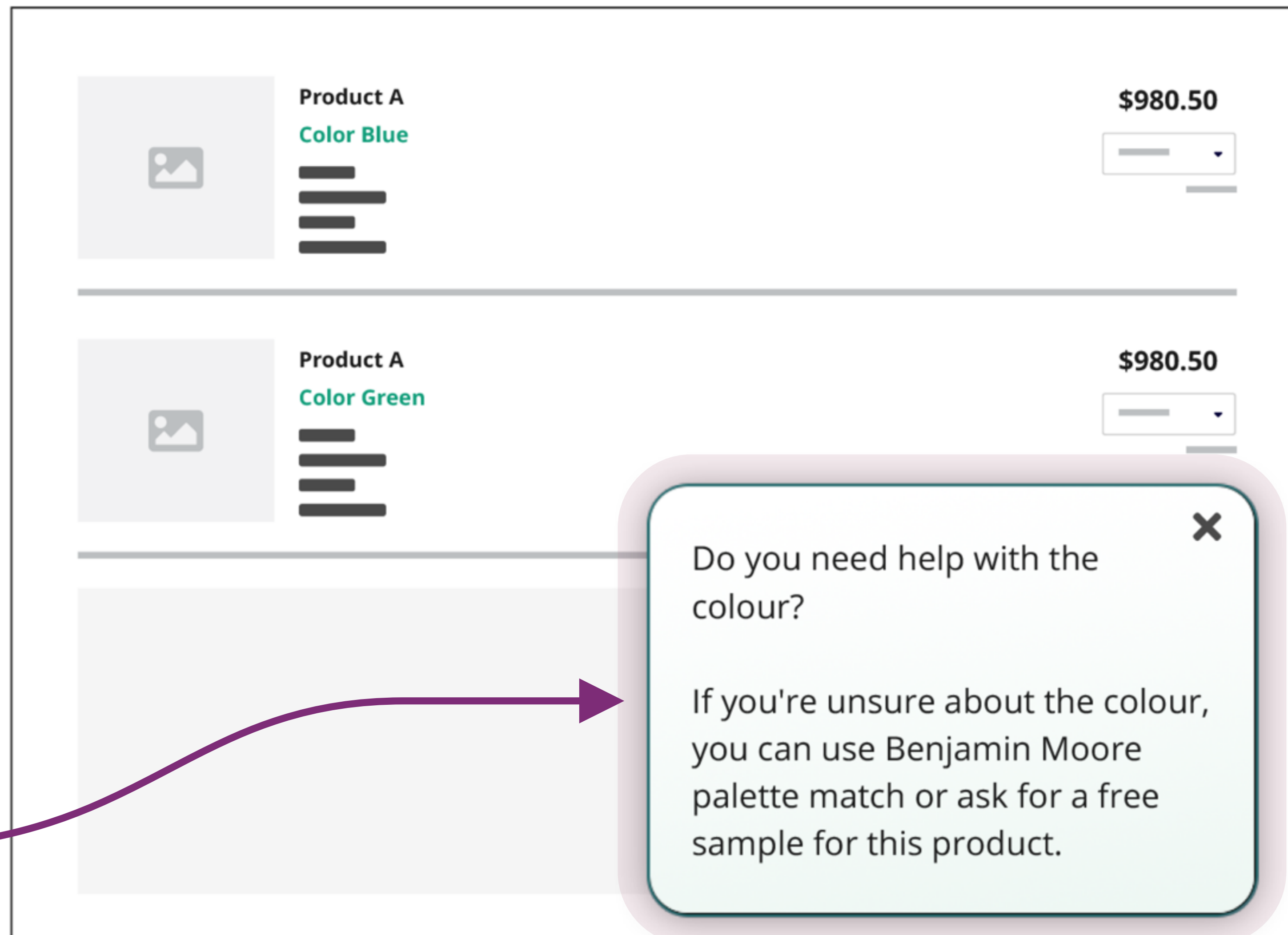
PRODUCT PAGE

When customer is looking up and down in the specs (or using other triggers) then proactively showing a message from chatbot that can help search within:

- Product Info
 - QA
 - Reviews
- Across all products



IN THE CART



Users are looking for a specific colour and can't decide which one is closer to what they want. They keep looking at different info to make sure about the colour.

↓

Since they can't decide, they add both colours to their cart so they can decide later. This can be applied to different sizes or materials....



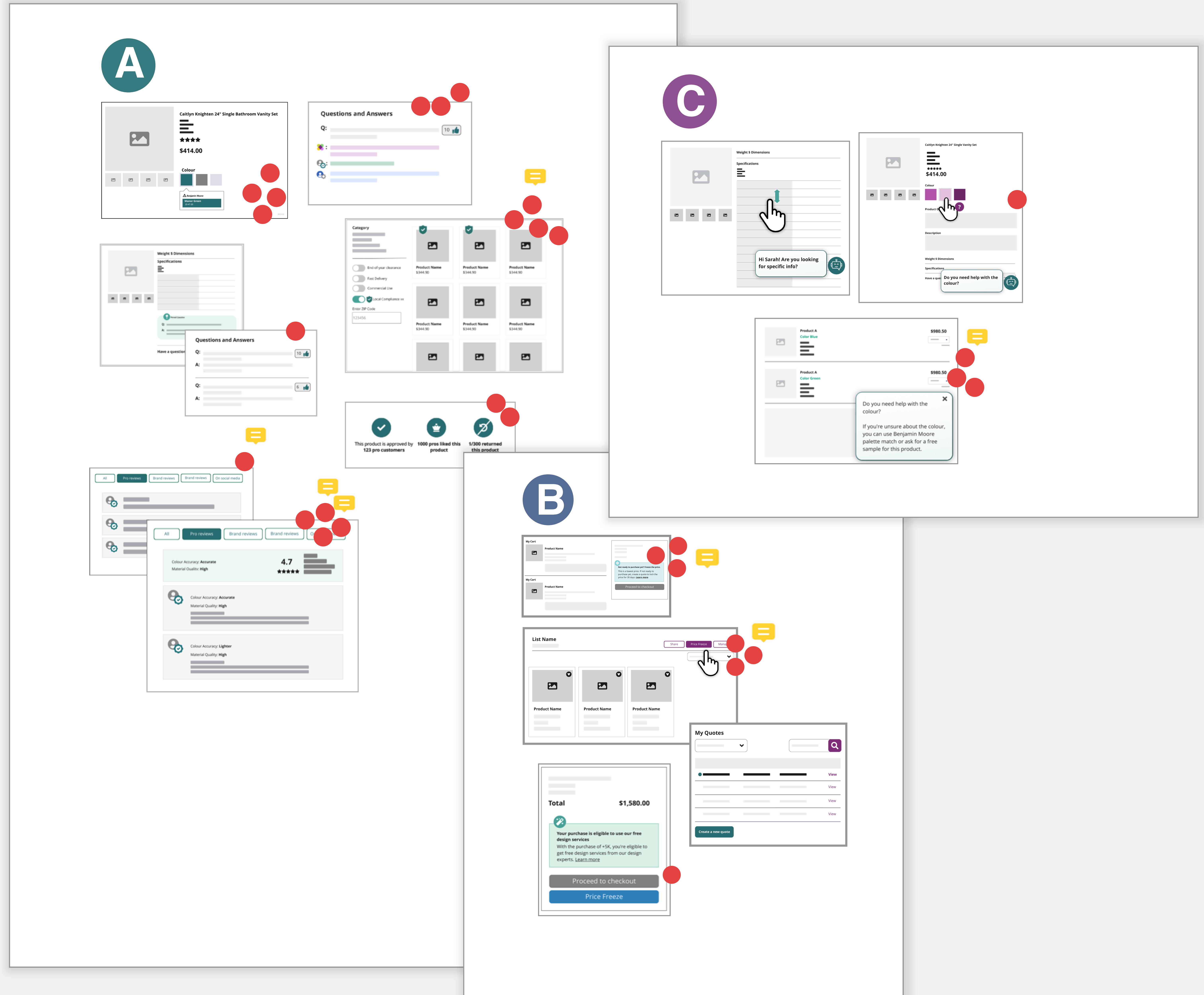
Stakeholder Alignment

RESULT

Selection

After visualizing the concepts, to get alignment with all stakeholders and technology, we asked the team to vote for 2 concepts that they believe can have the most impact.

5 concepts were selected in this phase.

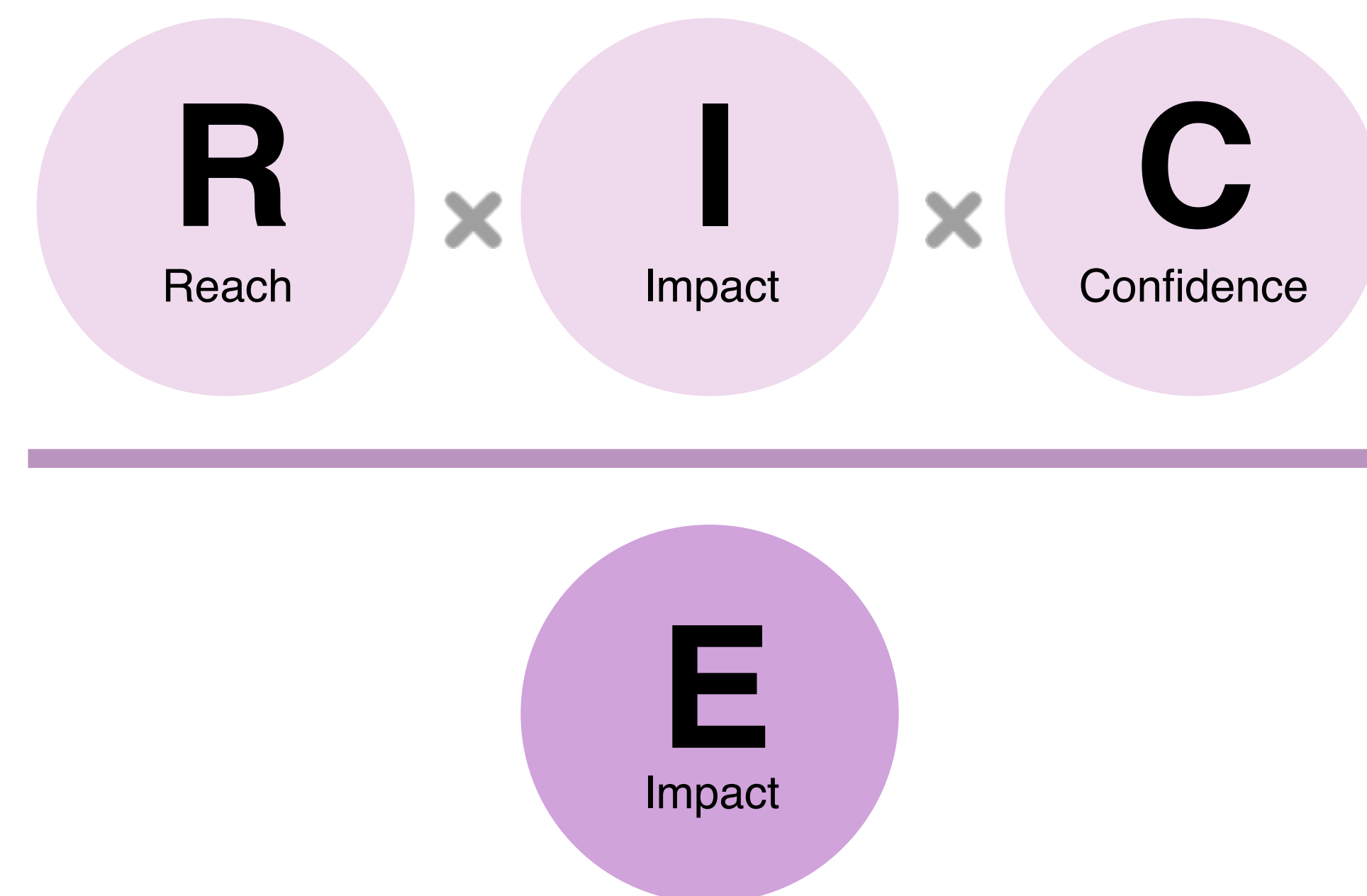


RESULT

Prioritization

In addition to the voting method for selecting the most impactful concept, the team used RICE prioritization method to evaluate to understand the feasibility, complexity and the effort of the ideas with the highest votes.

The outcome of this prioritization was mapped on our roadmap. Based on the ownership of each part, the projects were assigned to the Wayfair professional squads to be completed in Q2 and Q3.



Top 3 prioritized items:

Start Point

- Adding “Create a Quote” feature to “Wish List”
- Local Compliance Laws Filter
- Review Enhancement > Colour accuracy

WHAT'S NEXT

Next Step

As our next step for each of these feature, each of these features will become a project and the team is going through the full design process. From running quick research/ discovery, validating the concepts by testing them with actual customers to providing all the usecases and assets to developers for the execution.



Thank You

 **wayfair**